Episode 4: Behind the Screens: Remote Invigilation, AI, and the Business of Exams
VICTVS On-Air Transcript

Carly Culver 00:00:13

So, today's episode opens with a TikTok taken at the popular Consumer Electronics Show hosted in Las Vegas every January. The video shows an AI based anti-cheating software being showcased by Samsung, known as PROBA. The video shows a student taking a test with the software analysing their movements and flagging certain moves as abnormal.

That TikTok went viral with over 1.6 million views to date and prompted A deluge of comments and articles about the cost and potential bias of such systems. So, if even TikTok is talking about EdTech in 2022. Is this the year that the topic is really going to come to the forefront of big tech brands, minds and strategies? Joining us today to discuss this topic, as well as exactly what we mean by the EdTech industry and why we're seeing such growth is Ben Clayson, CEO of VICTVS and Geoff Chapman, industry expert, who has years of experience working with EdTech companies and exam owners alike. Geoff co-founded World Exam Tech, the Journal for Assessment Executives and Investors, as well as founding his own platform, active education that brings together exam owners and markers.

He's a frequent blog, poster and social media commentator on all things EdTech, so we're really delighted to welcome him today. So, thanks for being here Geoff.

Geoff Chapman 00:01:26

Oh, thanks for the invitation. Great to be here. Thank you.

Carly Culver 00:01:28
Fantastic.

So yeah, like I said, this whole thing starts with the TikTok that I saw a couple of weeks ago. So, what are the big tech companies doing in this space in terms of EdTech or assessment tech.

Geoff Chapman 00:01:42

Lot of the big brands that we know and love, you know, Facebook, Google, Apple, Amazon, AWS, Microsoft that they've all had their own certification exams for a number of years now, obviously delivered internationally and that IT sector was really at the forefront or one of The Pioneers of moving exams on screen you know and then into test centres and then to remote proctoring or remote invigilation.

But are they really engaged in the assessment space? Well, assessments as, as we know round the table it it's very heavily regulated. It's very emotive as well, you know a lot of people have something to say about assessment. You know everybody's been through some sort of education system. It's interesting because those brands. You'd expect them to make a big play in, in education and in some instance they have. Through the hardware.

Others, as you say in in terms of, you know, TikTok and more recent ones, yes, that they're taking a look at it, but are they actually pushing their own education programmes?

Some of the hardware guys, that's what they did back in the day for their IT cert programmes, basically, it was a way of shifting kit. So, you're using that education programme to basically have

those sponsors, those advocates within the corporate, to say we could do with a new Windows Server edition, and we need the education programme to back that up. So, a way of evangelising If you like, you know through an organisation to buy more kit. There are exceptions but, that's mainly what they're where involved.

Carly Culver 00:03:08

Do you think, sorry to interrupt? Do you think they're making them deliberately confusing? So, to force people to have to buy these training programmes from them?

Geoff Chapman 00:03:17

That's an interesting point of view I think it's part of a multi-pronged strategy. Obviously when you look at the difference how they call them channels to market or routes to market, one would be you're getting certain kits through your big box providers get getting it through certain other distribution channels, consumer channels as well and education Is one of those. Obviously, the school market, university markets, they buy kit. So, this is one efficient route to market if you will.

Carly Culver 00:03:44

OK.

Ben Clayson 00:03:45

And who would be the evangelists that you are talking about in terms of within organisations for these types of things?

Geoff Chapman 00:03:51

Pretty much your CTO, anybody who's involved with that procurement process to buy a new kit or is responsible for the refresh of that kit normally. Obviously if your organisation is more historically of a tech bent, if that makes sense. If you're more in in that technology side of things, you will have other stakeholders wanting to know what's going on. So obviously your FD would be interested, but also from an L&D point of view, if your organisation is heavily regulated, same financial services and you're trying to move into more modern technology platforms, perhaps you're trying to automate certain back-office processes. Then of course, you're going to have a stake in in what's being bought as well.

Ben Clayson 00:04:35

Bu am I right in thinking it's mainly kind of IT professionals who are engaging in these training programmes and that there's a degree of sort of value to these qualifications, as in their career qualifications that then can help people access better or different working opportunities?

Geoff Chapman 00:04:55

Yeah. Yes. Is the short answer the, the, the, the gender balance has always been a bit out of kilter as well, you know. You got to any the big tech providers, education conferences and yeah, it's 95%, at least male. It's very stark when you see that gender imbalance. But the programmes themselves, they are genuinely worldwide, you, you can be anywhere in the world and follow that path, depending on what you want to do. If you want to be a database writer, if you want to work in that field, then yeah, you can follow Oracles path no matter where you are in the world and obviously the assessment follows that. what we are seeing is organisations that are trying to look at different ways of assessing rather than just pure theoretical exams, so you have an organisation looking at

simulation where an actual task is on a server somewhere, and whoever that that learner is, they'll be actually go into that environment and solve a problem actually on there. So that has certain technology demands and I think that that's part of the solution. It won't be the entire thing, but it will be a mixed economy in that respect, the type of assessment.

You think of the assessment toolkit, if you will, you know simulations or portfolios of work. They'll be in there with the theoretical tests, but I think it only relatively recently were enough learners and enough places have that infrastructure to deliver.

Ben Clayson 00:06:23

Carly, can you tell us a bit more about the video that appeared on TikTok and describe what was going on, and tell us about what happened?

Carly Culver 00:06:33

Yeah, absolutely. So, like I said, it was a guy that's obviously attending CES in Las Vegas, which is one of the well is the world's largest kind of showcase from big tech providers of all of their new stuff and Samsung each year does a sort of innovation incubator where they feature obviously things they've plucked from around the world from different sectors and PROBA, I'm presuming that's how you pronounce it, was showcased and the video showed a student sat at their desk at a computer ostensibly taking an exam. There was then an overlay which was AI based that was monitoring their head movements, their body movements, and yeah, in the in the video, the guy, kind of leaned back from his desk and looked like he might be looking over someone's shoulder, a big thing flagged up on screen that shouted abnormal and like it's interesting because the guy in the TikTok obviously was saying like "cheaters, beware!"

Ben Clayson 00:07:26

So, it's very much part of this whole trying to use tech to prevent cheating and malpractice in an examination.

Carly Culver 00:07:34

Yeah. And the interesting thing is that a lot of the commenters on that video itself, and obviously it's been picked up by the wider media are saying, why are organisations paying for a technology like this when really they should be investing that money in the education itself rather than, you know, paying for a big piece of technology that's just there to help, you know, prevent cheating?

Ben Clayson 00:07:53

Yeah. So, I've got a question for you, Geoff. Based on your experience and that description, and yourself Carly too. Do we think that the majority of candidates are trying to cheat their way through exams and therefore need every aspect of their body language and movement and behaviour and eye movements and so on to be tracked and analysed by effectively a robot? Or is this perhaps looking at the Problem from a completely distorted perspective, and perhaps what the commentators are saying is actually the legitimate point, which is that perhaps the quality of the education experience, the quality of the assessment experience, ought to be the principal consideration, and is the tech better suited to being a tool that supports people as they go through assessments?

Geoff Chapman 00:08:40

it's really interesting because the rate of change in technology file outstrips rate of change within education and assessments. And so, you do have that imbalance.

Also, as well the communities that are trying to be served are very different for lots of different reasons. There are certain cultures where there's a lot more emphasis placed on high stakes exams than others. So, if there's a lot of pressure to achieve, in a Cliff face exam as they call it. Of course it will lead itself to certain behaviours, so all that's not new, but I think what is new is when you start to push through and again the , the pandemics being a classic example of this where we've tried to push technology to solve an issue you know, exam delivery and it's only worked to a certain extent. I think the industry hasn't done a great job in getting that message across to those communities to say how things have changed, how we're doing in proctoring and invigilation differently. You are pushing that responsibility onto the onto the candidates. Whereas the previous service encounter will be just turn up and sit down.

Now, if you're changing that to do your room scan, make sure everything's locked down. That is a big burden, and not everybody can cope with that. Especially in an exam situation where you're under enough stress anyway. Trying to perform, having all that responsibility pushed on to you is probably not a great recipe for a good outcome. I would say. So, I think the industry's got to be a lot better in not just communicating that and through PR and everything else, but to say they're different ways, there are different techniques to help that in a high stakes environments. But to what you said Ben, harking back to something I said a little while ago that assessment toolkit isn't always held up Under the microscope to see if it's actually any good and if it's appropriate.

You know you will get a lot of assessment owners, exam owners saying, well, of course, high stakes exams are the best measurement tool because look at all the research behind them. Well, of course the assessment owner would say that if they're delivering the high stakes exams, for sure. But let's look at some of those other things in in the toolkit. I mean, in, in terms of, you know, big tech players Carly, You've got people like Sony who've, they've got a blockchain product for the schools and universities and the Ministry of Education runs the annual Global Math Challenge in Japan for that and you've got a quarter of million learners going through that, but that is technology now.

Here we are in 2022, that's, you know, relatively established in lots of different sectors. You know it's using Fintech in medical, it's being used plenty of places, but nobody's really talking about those tools that in in the tool kit because of claiming quote unquote, there's no evidence behind them., even though you got lots of usage cases right around the world.

So yeah, when something happens at CES, it doesn't necessarily play back to the assessment sphere in in Western Europe.

Carly Culver 00:11:45

Yeah, absolutely.

Ben Clayson 00:11:46

I think one of the interesting things about the video is it highlights that kind of focus on the tech and obviously it's in a tech exhibition. So that makes sense. But I think it's interesting that you have big tech names, Microsoft and Google and Amazon and others providing certification schemes for all sorts of different qualifications. Then, looking at the assessment experience itself, like you're saying, Geoff, people get stressed, people get really anxious about exams, technical problems such as Internet connectivity and so on can exacerbate that.

And it seems to me that the kind of the idea of reliance on an overlaid box that will suddenly flash up an alert saying this is abnormal, it doesn't, to my mind, really kind of do anything to allay any of those anxieties. That's the kind of referring back to the very uniquely human experience of having to go through a high stakes assessment. I'm not sure or I'm not convinced at this point that that's adequately met by algorithms.

Carly Culver 00:12:50

No, and I think the interesting thing about the whole thing is that as much as saying sort of CES, is like a tech focused show, which of course it is, it's actually very widely recognised and it's reported in kind of, you know, normal media, not just kind of specific media as well. So that's what really interests me about the about the fact that it's like going on to TikTok, which people see as maybe like. stupid or facile or something, or not, you know, but it's obviously the most popular platform that there is at the moment, so it's I think it's incredibly interesting that that topic is even being yeah, is being focused on that platform and I think it's indicative of a wider kind of trend that people are thinking more about examinations, they're thinking more about how they're being watched or assessed. And you know when they are taking examinations…

Geoff Chapman 00:13:32

I get so frustrated when I see reports published that try to talk about malpractice and they talk about what's being done. And yeah, we, we all know that, you know, different tools are being used by learners to conduct malpractice and other people within that ecosystem and then you get a report published that says, oh, we should ban watches from the exam hall.
Well, you know guys? We've got to do better than that. We've got to understand the whole Vista of not just what's being used, but how you educate somebody to say if this happens, then the exam itself will, if it's got no confidence in the wider community, then there's no point in running the exam. If you're going to an employer and with a certain exam and that exam has been in the in the in the press around cheating and everything else, they're going well, Is it actually worth anything?

So, it has no confidence in the exam, then yeah, the whole system comes crumbling down. It's all about confidence and I don't feel confident when I see those reports that say ban watches. I think it needs to be a much deeper and wider review of how not just prevent prevention, but also education, not just learners as well.

This isn't their fault. This is more to do with the environment in which you know the learning is taking place. It's you know, about the educators and the other people who've got stakes in that whole Assessment Arena.

Ben Clayson 00:15:10

Yeah, I think that something that's often overlooked in relation to professional exams is that there's this big focus on learners and their malpractice and people cheating, individuals cheating when the reality is that professional training providers, of which there are thousands in the UK alone, they arguably have more of an interest In being engaged in nefarious activities like trying to get copies of exam questions and so on because they actually have a ready market of people that may pay to get those resources from them, individual candidates may cheat and you know they will always be a small percentage of people that want to try and gain an advantage.

But is that where the really kind of commercial activities going and is focusing on just the learners actually really kind of missing the point, is it sort of it's to me it seems like a risk assessment that's gone a bit Askew.

Geoff Chapman 00:15:52

That's a really good point. I mean the panorama, the, the UK current affairs programme did a big expose on English testing about three or four years ago now and yeah, that that's what happens. Basically, you've got those training providers who have an interest in a in a good outcome, quote unquote. So, it's driving the wrong behaviours.

Now if I'm a candidate and I'm turning up for test and somebody's at the front saying 17 is B, 18 is this then you're thinking, oh, well, if everybody else is doing it, it's classic Cohort behaviour. You know, if somebody else is doing it well, this seems to be acceptable. Why arent I doing it? Why would I be the wrong one out?

So yeah, its, it's I think again, through the pandemic, and even beforehand where you've seen instructor led training, uh, move to more of a home learning environment that could be a catalyst for change for really pushed that responsibility back onto the learner. You remember when I talked about pushing the responsibility in terms of remote invigilation I think in the training aspect that could be interesting as well where you're more you're communicating with peers online, you're getting you're able to access different advice around a subject, no matter where it is in the world, not just your tutor at the at the private training centre and you probably want to engage deeper because you've got that community and you're able to access mastery level knowledge and understanding of a subject as well, which is great if you get somebody engaged in in a subject and they want to pursue it. I mean that that's gold dust for anybody who owns a qualification programme, an education Programme. You know, that's real cradle to grave. So, I think that move from instructor lead to more home based. I think that's really interesting.

Ben Clayson 00:17:48

So, Carly, you've got personal experience of this Situation of having to deal with learning at home and then undertaking an assessment yourself and exactly as Geoff's talking about, you had the responsibility of going through that setting up and dealing with the monitoring personally.
So, my question is, when you're doing that in an exam, how does it feel? Because to me it feels, and I haven't got experience of it like yourself. But to me it feels a bit like an extension of the whole surveillance society sort of situation. Now I understand there's a requirement for monitoring people, during an assessment to high stakes exam, but how does it feel when you, as a learner candidate, suddenly have to take on the responsibility for monitoring yourself in that particular situation?

Carly Culver 00:18:46

Yeah, I think it's, personally, I find the experience quite frustrating because when it doesn't go right, it's like I said, the honest is on me as the learner to fix it. So, in my case is I didn't have the right webcam or something like that. It was a very specific piece of technology that I needed that I didn't have so that delayed my exam by a few days or something obviously then, when you're taking an exam, as you said, you're kind of quite emotional its quite an emotive experience you're building up, you've kind of prepped for that exact hour or that you know that exact day that you're gonna take the exam. And when it doesn't happen because of something that feels quite out of your own control, even though I think you've read all of the instructions and followed everything for then a disembodied voice on a on a computer screen. Tell me. Oh, no, you can't do it today. It's. Yeah, it's

incredibly frustrating, and it definitely knocks you off your course and in terms of how prepared you feel for the exam and maybe probably, well definitely my experience. Then the next time I went into it, you know my heckles was up. I was quite combative going into the situation. So, I was like I'm. I'm determined to do the exam this time, which probably wasn't a very nice experience for the invigilator that was working with because I was already going in with kind of a bad attitude, I guess because I'd already had a bad, because I'd already had a bad experience. So maybe that wasn't fair on them, but it must be something that people who you know do online invigilation must experience all the time. It's just the frustration of candidates when things don't, You Know their way and especially you know the exam I was taking was nothing to do with technology. So why should I be expected as a learner to know to follow some quite detailed specifications for technology when the exam I was doing was on a totally unrelated topic.

Geoff Chapman 00:20:05
I mean, who looks at the instruction booklet for when you get a new phone?

Carly Culver 00:20:08

Exactly

Geoff Chapman 00:20:21
Nobody

It it's you, you've got to ensure the servicing count is reflective of what people are used to, what it learns, and candidates are used to and if they're used to well, it could be, you know, plug and play or get yourself up and running in in 30 seconds. You need to have solutions That's play to that, rather than play against people. No wonder you're going to get, you know, people feeling antagonistic people, feeling upset if they're having to wade through something that is goes completely against what they used to, for sure.

Carly Culver 00:20:41

Is that something you think is indicative of the industry then that it's not quite at that intuitive plug and play style, both for assessment tech and the kind of the EdTech platforms out there?

Geoff Chapman 00:20:50

Spot on. Absolute spot on. Yeah. Mustn't beat these guys over the head too much, but it's…

Carly Culver 00:21:04

Ohh, feel free.

Geoff Chapman 00:21:06

Well, yeah, but it is an entirely different servicing encounter. When you look at some of the public domain commentary around that switch from regular invigilation to remote proctoring, some of those providers will say, well, we, we didn't, our clients weren't asking for it and we didn't invest much in it. And you're making a lot of these excuses as to why they didn't, you know, pivot quickly enough or and effectively it's upset in in a lot of ways because you can see it coming, but still they didn't do anything and that's trying to turn the tank around, you know, in a corporate sense. Yeah, absolutely. That's what happens if you have a certain size, but basically that that that pushes all that stress onto your learners and that shouldn't be happening, you know, professional PR plug and play

products, you know, design from the ground up, which again, I Hate repeating myself on this, but you've got to, you know, have user forums.

I mean, there's one very big school exam board, in England, that's only just recently started with a candidate forum. You're actually talking to people who take the exams because they're providing a service, all of their revenue is for this service, but they never spoke to the actual kids who were taking exams. I mean, how nuts is that? It's just unbelievable.

Now every exam owner should have that, sort of information coming to them on a regular scheduled basis. In any other business If you weren't getting user feedback you, you'd be out the door. You know that's marketing 101.

Ben Clayson 00:22:32

I think it's the It's the scale of high stakes exams globally and the fact that historically, you've got candidates who are obviously key stakeholders who seem to be given less sort of opportunity to have constructive input into the experience, and then the lockdowns and remote proctoring requires them to be involved, but they were not used to it. Now things are changing again. So, we're looking at candidates potentially coming back into centres. So how does that then work in terms of candidates taking responsibility for anything, are they supposed to just hand back over responsibility? Because I don't think that will work very well because I think the video on TikTok, but particularly the comments is indicative of what you were saying, Carly, about these people paying attention now to the quality of their own experience, and rightly so because most of them are paying for it.

Geoff Chapman 00:23:27

Absolutely. Yeah. Again, when you see a lot of stories that will be on February 22 and your UK cost of living, you're going through the roof inflation in terms of disposable income, a lot of people saying, look, this is very, very valuable indeed. A big chunk of my disposable income that I'm spending on my own education. I want a good service for it, you know comparable to what I'm used to in other environments. And if they do start to go back to the test centres and they start to see that cognitive distance if you like or good service versus bad service, they're going to ask questions and with social media, they've got the voice now to start really not just discussing it, but to really, you know, going hammer and tongs as they say. So again, are exam owners set up to handle that? Are they set up to articulate themselves through social media? I don't see any evidence of that to be quite frank.

Ben Clayson 00:24:33

Yeah. So, the technology's there, it's available, it's great. It does really interesting things, but like any tool, it sort of depends very much on the users. I think that was my kind of take away from that video. Yeah, over focusing on technology kind of leaves a big gaping hole.

Carly Culver 00:24:42

Absolutely. Because like I said, it's easy for us. We're in the industry, we know kind of what's out there, but an AI monitoring technology isn't new. You know, it's not, it's not new, it's not a new piece of technology either as a piece of technology for other applications or in the assessment industry. However, what is new is the fact that, yeah, it's being showcased on a very public platform.

So, I want to roll it back slightly. We're all in the assessment industry. We kind of know what it means, but I want to help explain that for other people. So, what would you say is the EdTech, the assessment industry, who's working in it? What are we actually looking at?

Geoff Chapman 00:25:16

It's what can I say, a great industry to be in and it's been a bit of a privilege to work for as many as I have. I think in terms of, you know what the catalyst is, obviously the internet is the big driver for it, but also as well, reach, by that and mean organisations that want to be the voice of their industry, you know, they may own and examine their own education programmes, but they want to influence policy. They want to spread their wings internationally and Internet delivered assessments and education is a method to do that.

So, I mentioned before about the IT sector, but also financial services, the medical profession, those sectors that have certain demands. So, in the medical sector, if there's a shortage of a particular profession, then you can use the education programme to plug that gap.

If I'm a medical organisation in one of the GCC Middle East countries, I can set up an education programme that can ensure that people who are coming from other countries like Sri Lanka and Philippines to work are of the standard that I'm looking for, so it fulfils that particular gap. If you like that, that particular need. In terms of what the technology play, I mean it, it's interesting it's, it's the old cliche of if you hang around long enough, you see the technology come back you know twice maybe even three times.

You know, things such as Internet delivered tests, you know you're talking 20 plus years where that's been possible and have been done. But as the infrastructure globally has caught up, then you know people like me will say, well, yeah, we could have been doing this for a long time ago. But for lots of different reasons, it was it was never done we mentioned at the start about education Assessment being very emotive.

Lots of people not just have a have a say, but a lot of stakeholders to look after as well. So, when you see a piece of research like what Ofqual did with YouGov, last year they said, well if you're looking at delivering school tests online, who are the people or the groups of people that would like that or wouldn't like that? And the research showed that head teachers were the people who were most against that. So even though the technology exists and that you've got practise in lots of different sectors around the world, even within your Western Europe and the UK.

Those stakeholders still need to be convinced for lots of different reasons, so if I'm a head teacher, do I want exams delivered off site where I don't have that control over my own Kingdom? If you like, you know from my own school or my own Academy chain, those questions aren't being asked at the moment. Obviously, we talk about, you know, students and you know, teachers themselves will have to undergo certain tests before they become fully qualified. But the for heads that that's something which is still going to be debated it, it still needs to be convinced about why it's beneficial for not just my school, but also my pupils and also the people who work for me. Again, I don't think the sector has done a great job in, in in reaching out to people like that and explaining how it works outside the school arena or whether that's down to the vendors or whether that's down to unions or governments. I think it's a mix of them. It's probably because nobody wants to take a very a very sharp Thistle. If you see what I mean? They don't want to grasp that thistle right at the moment, but I think there's an understanding that there are certain groups of people who saying would still have to be convinced about this. So, I think that's where some of those blockers to rolling out the technology and the new solutions are coming from.

Ben Clayson 00:29:10

So, I would suggest that the effects of lockdown has been a kind of rapid acceleration of the certainly the consideration, if not the adoption of technology based solutions to kind of assessing people. And then yeah, you've kind of got people being forced to look at things differently and trying to find different ways of delivery for assessments because perhaps their revenue kind of depends on those assessments. But in terms of education, kind of endpoint assessments or sort of high stakes assessment really has changed very little since the sort of industrial revolution.

And it's interesting to consider whether my generation, which began with no Internet whatsoever and then suddenly had an Internet at the age of 16, which was great, and subsequent generations that are digital natives for want of a better sort of descriptor.

Ben Clayson 00:30:21

As they kind of grow and then turn into senior leaders in different industries, all the ones that you mentioned and plus so many others, it's likely I think that they're going to be much more receptive to those kind of technology first or yeah, technology driven things like assessments that have traditionally being a bit more manual and a bit more traditional.

Ben Clayson 00:30:45

Does that make sense?

Geoff Chapman 00:30:46

Yeah, for Sure, for sure. I mean, in in uh on the ground, you know, in in skills that we use, not a lot of different kits for different things. You know, you know, basic programming with your purple mash or different devices for recording media and there comes a certain point where they go you've got to put the tech down and learn how to write for three hours. For me, that's the kind of Cliff face for me, it's that's the moment that we need to change it. It's you have to learn a different skill for a very short period of time and yeah.

Once you go into the workplace, that skill really isn't needed. And you think, well, it's, serving the system. It's not serving the learner's journey. It's not serving, it's not actually serving the qualification in some respects because of that manual piece that you mentioned.

Ben Clayson 00:31:29

Yeah, because it's focused on yesterday instead of tomorrow. Yeah.

Carly Culver 00:31:32

It's like the standard thing of when you're at school, your teachers like you won't have a calculator forever, and now everybody has a high-powered scientific calculator in their phone at all times, so you don't need to learn how to do trigonometry.

Ben Clayson 00:31:47

That's it, and I regularly do long division.

Carly Culver 00:31:42

Absolutely. I think I had to Google how to do long division The other day.

Ben Clayson 00:31:46

Yeah, I'm impressed that you needed to.

Geoff Chapman 00:31:50

I think as you said, Ben, that the pandemic has, it's not changed attitudes and it's shown a very harsh light on current practise and what what's bad about it and why it's so divergent from all the assessment that's has gone either on screen or online. I did mention in the blog quite recently that It's becoming harder to find examinations that haven't been pushed online. If I'm a small membership body and part of how I get members is for them to sit an exam to prove they've got mastery of what I'm in.

Those smaller guys don't necessarily want to be investing in big analogue solutions. If there's something which can be bought relatively easily in a digital form and able to be dispersed or sold worldwide, then that's a real boom for me as a small organisation, you know.

No big start-up costs. I'm not having to rely on couriers sending papers everywhere. That plays to how I look after my business, how I look after my members. So, if I'm able to reach my members through various different online platforms, it would seem a bit strange for me to say and you know to be a member you've got to fill in a big bunch of papers and sit an exam with a big bunch of paper as well.

You see what I mean? It it's that cognitive dissonance or it's, you know, what's wrong with this picture? Why are you trying to shoehorn an analogue process into my digital world?

Carly Culver 00:33:17

I think that brings me on to something I wanted to ask you, which is about the kind of market in general are we talking? Well, a few big players in terms of EdTech and assessment tech. Or is there a, you know, is there a kind of long tail at the end of thing? What does it look like?

Geoff Chapman 00:33:31

Sure, sure. I mean it's generally global sector, which is great. There's lots of examples of good practise, scale, innovation it's, it's sometimes unfortunate that people who make policy decisions don't recognise that. But when you look at the, the, the numbers behind it and who are we serving? I mean, if you include universities, you're looking around about 34,000 organisations that run in high stakes exam around the world. Generally served in the EdTech or assessment space, if you will.

You know, 160, 170 organisations that will say, yeah, we provide test software a platform for high stakes. So that includes you're offering the test, delivering them and obviously the reporting on the back end and yeah obviously the pandemics really brought to bear the people who do remote invigilation and around about 90, almost 100 of those organisations that are into that, they are generally global. Uhm, organisations in America and the UK, Netherlands, India.

I think what's interesting is that from, again speaking as a Brit, more of a realisation now that we do export assessments and we do rather successfully. So, I mean in again for the numbers you, you're probably looking around about 40 million exams delivered in the UK, but we export a further 11 million so to me that that says that's UK education actually resonates in lots of places around the world. And I think it's important that as we're trying to win over people in the bigger general qualifications market that we bring that success story to bear we don't talk about that success for lots of different reasons, which I often find very difficult to fathom. For UK PLC to have that sort of export is a really big success story.

You know whether it's an organisation in a in a country that's wants to develop its own programme but needs brit expertise to say, how do you set up the qualification programme education

programme to basically bringing in Brits on the supplier side to say we want to run remote invigilation can you? Can you do it for us? Because we know you guys are good. So, I think it's a great success story in in that respect.

I think what the pandemic has helped with as well is plugged into some of those trends. Uhm, you know, the assessment sector does lend itself to the gig economy in in lots of ways, whether it's, you know, remote invigilation or item writers or psychometricians, you know, the people who analyse how exams are performing.

So, it, it does lend itself to, uh, what's going on in wider society. You know, this isn't all about. We hope, you know, Stuffy 9 to 5 uh, in big bad offices. Uh, in plenty of places.

I think the irony is that a lot of exams still delivered by those sorts of organisations, you know those 9 to 5 big places I think will be interesting once we get through the pandemic in terms of will those organisations change or are we going to see a new wave of organisations who can do it better using, you know, different techniques as we've discussed.

We've been able to discuss and talk about the difference. Uh, items in the assessment toolkit and yeah, deliver a better experience also deliver it quicker and probably with a better price point as well to the to the learner.

Carly Culver 00:37:06

When we're talking about the scale of the industry, how many people are we actually talking about here? Both sort of UK internationally?

Geoff Chapman 00:37:12

Ohh crikey, I mean. Yeah, that's a hell of a question. I mean, in terms of the supply base with an assessment you you're looking at a value around between eight, eight to 10 billion. But what makes the you know the people calculation difficult is the nature of how your exams are made and delivered the whole gig economy, the Proctor, the item writers, the markers.

Because you know, these aren't nine-to-five people. I mean the, the, the great irony is that a lot of those big exam programmes are still owned by organisations in the in the 9 to 5 old stuffy offices environments. I think what we're going to see, you know a new wave of organisation that was able to You'll look at new techniques, proven techniques from around the world and pull together a better assessment toolkit that doesn't negatively impinge on learners, but helps them perform to the best of their ability rather than, you know, going through the old ways, which I've got a tonne of research behind them, those new wave of organisations will be able to deploy a lot quicker, be able to create assessment which is more meaningful.

Geoff Chapman 00:38:18

But also deliver with a better price point. So yeah, it it's hard to, you know, pin a tail on how many people are employed, if you if you want to use employed in the traditional sense so. So yeah. Umm, that expertise that uh, you know UK expertise is really cherished and I think we that should be leveraged a lot more in in terms of what we could be doing.

Not just outside the UK, but to improve what we already do.

Carly Culver 00:38:46

So, let's dive specifically into remote vigilate or remote proctoring, as it's known in the US, as we've already discussed today, the pandemic was a huge driver in the growth of that market. Do you want to tell me a bit more about what we're seeing there?

Geoff Chapman 00:39:03

The way of delivering exams is, yeah, traditionally it's been of hundreds or thousands of years. You know, the Chinese Civil service exams where often cited as being the first one. So, we've really lived through a big sea change, you know through the pandemic. A lot of organisations that have sprung up, you're looking at almost 100 suppliers, offering different flavours of the solution but there is a bit more to the story. I mean, when to scratch below the surface you do have those organisations of the pure play suppliers who've done, you know, very well through the pandemic and those guys probably trading around about 200,000,000 collectively, so that's actually not bad from being kind of esoteric left field solution that's you know, 2-3 years ago people where kind of puzzled and scratching the heads, what's it all about?
But those organisations and others have taken up the pioneer pain, you know, trying to deliver a service transition from traditional exam delivery to remote proctoring. We've talked about the messaging side of things, but also the risk profile of exam delivery, the risks of delivering something on the desk, on paper, are very different to on screen. You know, pushing responsibility to the candidates that we've talked about.

But the traditional supplies are still in that mix. What I find interesting when you look at those public domain numbers for the, you know, traditional suppliers who've managed to pivot. Not all of their exam volume has gone on to remote invigilation it's between 13 and 18% in terms of that that transition, which is interesting.

Now for some candidates, finding a place at home for remote is a complete non-starter. You know it could be a busy family home with young children. It could be a home of multiple obligation, or you've got a geography that is Internet challenged.

Those candidate bases still wanting a traditional test centre solution, so it's not for everybody and I think we're only really at the tip of the iceberg for a lot of movements towards remote proctoring. And again, that that's probably a symptom of the sector and the supply is not doing a great job or could be doing a better job in articulating what you need to do and what that looks like for the end user.

So, it is a. It's a totally different service encounter. I mean, we've just seen, there's a high profile European supplier that was sold to a British arm of a US supplier in the higher education space. And you know when you read about those companies and you talk to their customers, absolutely, you know they've done a fair job and they're doing a fair job. But could they do better? I guess that's Something that the new owners are going to be thinking about.

It's remote invigilation, remote proctoring has grown despite a lot of the supply behaviour, despite a lot of things that have gone on, you know, in education, for their clients and the and the learners. And yeah, for organisations and people with who've got the monetary backing to invest in it EdTech and assessments, they're going to be looking at that to say, well, what could be done better? You know, are we reaching the right people that we need to, and that investment side is, is something really, really interesting to talk about?

So yeah, for acquiring companies or venture capital or private equity houses, it's not always about

packing an already successful winner. A good acquirer will understand the addressable markets, the scale, the back office, the product lines. It's the management of high performing.

Uh, obviously don't get me wrong, some will just, uh, flip for a quick profit. You know that that does go on, but others who want to invest will try and bring in expertise and financing to increase the value of what they're doing. And I said before, we, we've seen that happen in Europe. There's also a software company I can think of which they brought in experienced, productive backing not just to pay for revenue growth, but to enhance the management from an unrelated sector. So, they identify that, yeah, it's a good product, but the management could do with, you know, turning up a couple of notches.

And yeah, the, the acquired and the acquiring companies were in different assessment spaces and approached the market in very different ways, but very complementary ways, in some respects. So, it's understanding that, yeah, they're doing great, but they could be doing better and getting that outside expertise in. So yeah, that's kind of sweet spot really where you've got those slightly different approaches, but it's complementary, but there's still headroom for improvement. You see this in the in the membership space as well. It's adjacent and overlapping with assessment that I talked before about a membership body trying to uh be the voice of their industry and being in in international. in the last couple of years, the US private equity House has been conducting what's called a roll up. So, a roll up is where they consider what services are market requires and they buy businesses to fit into that jigsaw if you will.

So, in the roll up back office, the IT becomes shared and the brands that resonates are kept and the brands that don't are quietly sunsetted and the IP is supported as well. So those organisations invest but understand what basket of services the membership bodies or the exam owners actually require, And I think that's quite powerful. You'll see a lot more of that over the next two or three years once you get through the pandemic where investment companies will understand a lot better what goes into an exam, and what's in that heady brew as I would call it.

Ben Clayson 00:44:35

Yeah. I think that when you look at some of the reactions to lockdowns, which were obviously, you know a pandemic response. That's a very unusual situation and hopefully very much exceptional. So, you have this kind of switch fire to remote invigilation and then a bit of a knee jerk, and you have the delivery done by whatever means necessary. And then we've had, because it's gone on long enough, we've seen this situation were now exam candidates and learners are discussing this and asking for different things and you know they're, yeah, discussing the kind of the intricacies of the actual delivery and the nuance of it. And then at the same time, you've got as you're saying, you're talking about investors who are potentially sort of understanding more about exam creation and exam delivery.

And it's interesting because it all sort of suggests that what should be happening is thought about the future rather than thought about right now. That seems from what you're saying to be a bit of an industry kind of trait because we were discussing earlier the kind of college admissions scandal over in the States and the fact that people are or have been able in some contexts to get away with their own sort of individual activities in the background without being scrutinised because there was no means of scrutinising them.

Getting everybody into an exam hall might not be particularly useful but using purpose design technology in order to facilitate kind of independent third party monitoring of that kind of activity, even if it is a bit more nuanced or even if it's very small scale kind of tutor led assessments and

private exams for, you know, one or two candidates. We've seen that the technology is there now to allow people, whether it's the awarding organisations or whether it's independent third parties who actually monitor all of these different aspects of the entire assessment ecosystem. And I think that, well, you would hope that that kind of greater Intelligence and awareness would be something that not only exam designers and delivery suppliers, but also investors might be more aware of the fact that the education technology meets the service providers and becomes something bigger. You know it what it always was, but now it's kind of maybe a bit more obvious.

Geoff Chapman 00:47:02

The rub is you've trying to measure something in a standardised way, so everything fits in the box and on the other side you've got organisations in lots of places, you know, empowerment of learners. They've got a voice through social media. You look at any Reddit forums and yeah you you'll pick up plenty about remote invigilation this isn't all about what's on the BBC website or on the Telegraph or the Guardian in the mainstream guys.

This is all going on the channels. That's those learners I used to using and that's the rub. How do you as an organisation, how do you engage with that discussion at that level? User forums are part of that. I don't think is the full solution. I think you know to useful first step, but you're trying to.

Accommodate the right word, but you're trying to understand the learners better, but appreciate the demands of a of a standardised environment because you're trying to at the end of the day, create shorthand for somebody know what they're doing. You know that that shorthand, that, that can be easily understood, and that's probably one of the barriers in terms of articulation to say we're going to move from a single grade of a three-hour exam to a deeper and richer understanding of what that person it knows how they're learning, how quickly they can learn, and what, how are they competent. So, I think that's a huge challenge for the assessment sector to wrap their arms around and embrace to say the learners and those stakeholders, have been empowered through the pandemic to remote invigilation and learning from home. And yeah, they've been they've had that exposure, they know all the different techniques, but you're still trying to deal with the standardised process that employers and higher education institutes recognise that shorthand we need to move away from that in in, in my view you can look at portfolio, you look at different I ways of authenticating evidence from trainers and from different stakeholders. You know people who are actually involved in that education process.

Digitally authenticating that evidence is more powerful. You want advocacy statements from somebody to say yeah, John has managed to, you know, build this brick wall in a certain way. He's used this technique. This is what it looks like and then actually having John explain.

I think that's probably more powerful to an employer than a shorthand of B grade in a certain qualification. I think that's the chasm that we next need to step to.

Carly Culver 00:49:57

So obviously we've discussed the impacts that the last 24 months have had on the industry. But what I'm really interested in hearing from you, Geoff, is what the future is going to look like. You know, when things are going back to normal and we're kind of coming out the other side. What do you see?

Geoff Chapman 00:50:09

There's been a real awakening. Examiners sort of saw pandemic as an existential threat. You know, if 80% of the revenue is coming from exams, then no exams delivered mean you go bust, you know it's that Simple. So, for those exam owners whose learners are in, say, the emergency services or other critical jobs, they still need their exams to go to work. You know, for them, that's non-negotiable almost. so, the impact for learners, I mean, this has been super hard for the learners in some respects, I mean, trying to pass an exam is stressful enough without worrying about if you can find test slot, you know at a Centre.

So, I think the industry did a reasonable job in trying to turn the taps on either scaling remote invigilation or, you know, trying to pivot away from testing the rebuts. For me, here's what's interesting, I mean, the traditional suppliers were caught on the hop. It was a heady brew of hubris. Defending their real estate, you know, defending their own business if you like. So, you have seen a lot of the copy for the new wave come through and take advantage of that.

Now, for the first time, I think you know, through the pandemic and we'll see more of it in in the in the short term is that many exam owners are now turning to innovative suppliers, boutique suppliers that can move quickly because obviously they've had a bad experience. The traditional guy just couldn't move that quickly. So those suppliers are seeing revenue uptick. Which is great and I think what we'll see in that short to medium term is those guys invest in governance and systems that will level the playing fields that they can present that innovation and present that speed and you know freshness to organisations, exam owners who probably previously wouldn't have considered that. So that's the kind of short medium term.

I think the medium long is where the investors are now paying attention. So in prior to the last 24 months, training organisations would probably see 80% of the attention with assessment 20%. You know if you think you come on a common instructor lead training four days and one day of the exam. It it's not dissimilar in terms of the attention.

So, I think on the investment side, I, I think it's wonderful in a lot of respects. I saw a webinar by the UK Government Trade Department on China on Monday, and they commissioned EY-Parthenon to look at their level of financing for vocational education in China.

So, just to get some perspective on the what's coming through here in the first half of 2021, the deal value was about £720 million for the whole of 2019 is 192. So that's a 275% increase. And what's additionally interesting to that is the number of deals Is decreasing. They might think oh, that's not good. What's happened? There's not enough deals, but it's actually the value of the deal is going up and it's the number of deals is going down, but the value is going up. That tells us that the markets maturing it, it tells us that the market and investors are becoming more versed in what EdTech and assessment is all about, which is great, it it's starting to look under those rocks. It's starting to, you know, chip away at some of the old trusty things that we've always been taking for granted. Nobody's ever questioned. So, I think it's all good in, in the short, medium and long term.

I think what I said before about that concept of the toolkit, I think that's still a frontier that still needs to be discussed. I think we've just come through a lot in the last 24 months. So yeah, once we caught our breath, I think that'll be the next place I'd like to go to.

Ben Clayson 00:53:34

So, if we got any ideas about that toolkit and my kind of cup of tea, you know, where are we going with magic space robots that do exams while they're flying around?

Geoff Chapman 00:53:51

Oh no I hate these robots. Any sort of at Tech PR, it just waters and cheapens the debate.

Carly Culver 00:54:03

What examples are there? I'm curious.

Geoff Chapman 00:54:02

Oh, there was one at the BET show the last year or the year before and somebody was using a robot, you know to do a certain task and say, oh, is it would be great to have one of these and oh yeah, well that means robots are replacing teachers it's just. Oh, yeah.

Carly Culver 00:54:03

 Yeah.

Geoff Chapman 00:54:19

 Just Shoot me now.

Carly Culver 00:54:19

There's definitely a Daily Mail headline, right there.

Geoff Chapman 00:54:20

It's not helpful to debate.

Ben Clayson 00:54:22

Yeah, that kind of reductionism about, oh yeah, this is definitely the solution to that. I think that the trick is using things as complementary tools to help learners do different things. Like you said earlier about assessing somebody who's doing something very manual and physical and trying to provide evidence of that, I think that it's really interesting to look at some of the virtual reality systems which are now evolving and becoming better than they were and the very rudimentary ones were a little bit naff in terms of the experience they provide, but now they're beginning to get really quite good.

And I read something interesting recently that was talking about how the reality that's presented inside virtual reality doesn't actually need to be ultra-high definition, incredibly detailed and so on. Because your brain makes the connection for you, so you feel very immersed, even if it's only 30% resolution. I'm probably misquoting that.

And so, you can see the benefit in terms of training applications then in terms of assessment applications, I don't think these things are being used a lot at the moment because the assessment methodology is still like we said earlier, quite based on old fashioned methods.

Geoff Chapman 00:55:35

Wherever there's risk, those solutions are working well, especially the corporate space. Yeah, oil and gas and that kind of thing. I think 1 thing that might be holding them back is the service encounter the especially given the pandemic. Nobody wants to put on a sweaty Oculus.

Ben Clayson 00:55:52
Yeah.

Geoff Chapman 00:55:58

that's been through your 7-8 different sweaty guys that morning. It's how do we get around that? Obviously this thing like Google Cardboard that's almost disposable in in some ways, but they do the job. So again, it's service encounter, the price point, the availability of that kit when we talk about simulations as well, I mean one of the things that always held back simulation. Is, is it accessible for everybody or if a trainer can spend 50 grand on a simulator for aviation or for driving, that's great, but that should be made available to everybody so that everybody has an equal chance of passing that assessment, whatever that looks like. So, I think there still some road to run on that. I think what we might see is identity systems becoming more into the mainstream for lots of different reasons where you've got. There's certain UK organisations that now have an app which lets you use post office services at the post office and they're using them for, age checking, for alcohol in, in the retail environment. Once those solutions become mainstream for certain demographics of learners, then the big yeah, I use this to, you know, got the shops or to the post office or whatever it is to buy something online, once that becomes mainstream, then yeah, we'll rerun that process again that we did for paper to 1 screen. You know it's used elsewhere. Why? Why can't we apply it? When we checked to see if this person is who they say they are doing the doing the exam.

Ben Clayson 00:57:28

I think now is a good opportunity to for people off the back of all the innovation of the past 24 months to be really future conscious and to be aware of the fact that time passes quite quickly when you're busy and so on, and we now live in a world where Elon Musk, SpaceX are actively looking to colonise Mars at some point in the future, and it seems quite likely now. When 50 years ago it would have seemed like utter madness.

And it's interesting. I was reading it as well yesterday about the asteroid that they were talking about potentially landing on, and I think it's really, you know, although it's very sci-fi considering things and working through hypotheticals, thought, thought experiments about. How could people be regulated in terms of professional qualifications? Should they be outpost on at an outpost on Mars? You know, living off Earth as people have been doing for the past is it 15? 16 years now on the space station, I think?

That kind of future thinking can't hurt our industry if it's perhaps a little bit steeped in tradition and perhaps a little bit or recently suffered a bit of a stumbling block as a consequence of that.

Geoff Chapman 00:58:51

That one thing I've learned is that the progress is never linear and the cadence of that progress is it can be interesting as well, I mean, you know, relating to the space programme, once we saw man land on the moon in 69, we thought, yeah, you know, we'll be able to. We'll be on Mars by 76, but lots of different reasons why that didn't happen. And again, it's quite bumpy and lumpy uh to use the cliché. It's I think we'll, I think we'll see that. We've talked before about you know the blockers and the enablers and obviously the pandemics played its part. But yeah, there's an interesting perspective of when policy aligns up with what could be done. Now, I think. I think we're starting to get towards that point were moving big swathes of general qualifications on screen was just not on the policy at all. We saw that in the O's where we were promised all schools exams will be online by 2009. Obviously, that did happen because the recession and Malpractice, that was a big issue, but back then to certain tests. But now it's starting to come back into that window. It's what's called the Overton window. After a U.S. policy person. And I think that change is, is just about to getting into that window. So, it'll be an opportunity for lots of organisations to engage with that.

And it's a shame because yeah, to your point Ben, we could have been doing this, you know, 15 years ago without too much hassle. In my view, it's only now where with the pandemic as a catalyst is that that policy is starting to get into the sweet spot. So yeah, what we talk about, short, medium long.

I think the short term that's really exciting for everybody in, in the sector for actually policy and the ability to do something and have the backing from enough stakeholders to get something done. Yeah, it's something to look forward.

Carly Culver 01:00:52

To Geoff, thank you so much for joining us today. If people are interested in hearing more about you, hearing what you say, where should they find you?

Geoff Chapman 01:00:58

Geoffchapman.com, that's the easiest thing to do. If you're into Twitter @chappersman.

Carly Culver 01:01:07

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