

# 2018 Canadian Survey of Online and Digital Learning

**TESS**

**November 13, 2018**

**Tricia Donovan and Tony Bates**



**Canadian Digital Learning  
Research Association  
Association canadienne de  
recherche sur la formation en ligne**

# Overview

- Background to survey: 2017 and 2018
- National Survey team
- Developing the roster
- Main results
- Next steps

# Background



- Babson and IPEDs data in the USA
- 2017 Canadian National Survey
- Canadian Survey team + Babson + WCET
- Funding & Support: \$200K eCampusOntario, Campus Manitoba, BCcampus, Contact North, OCAS, Pearson Canada, Quebec, D2L
- Other organizations include: CICan, Universities Canada, Canadian Virtual University



# 2018 National Survey Team

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Babson Survey Research  
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WCET, Definitions & USA  
comparison

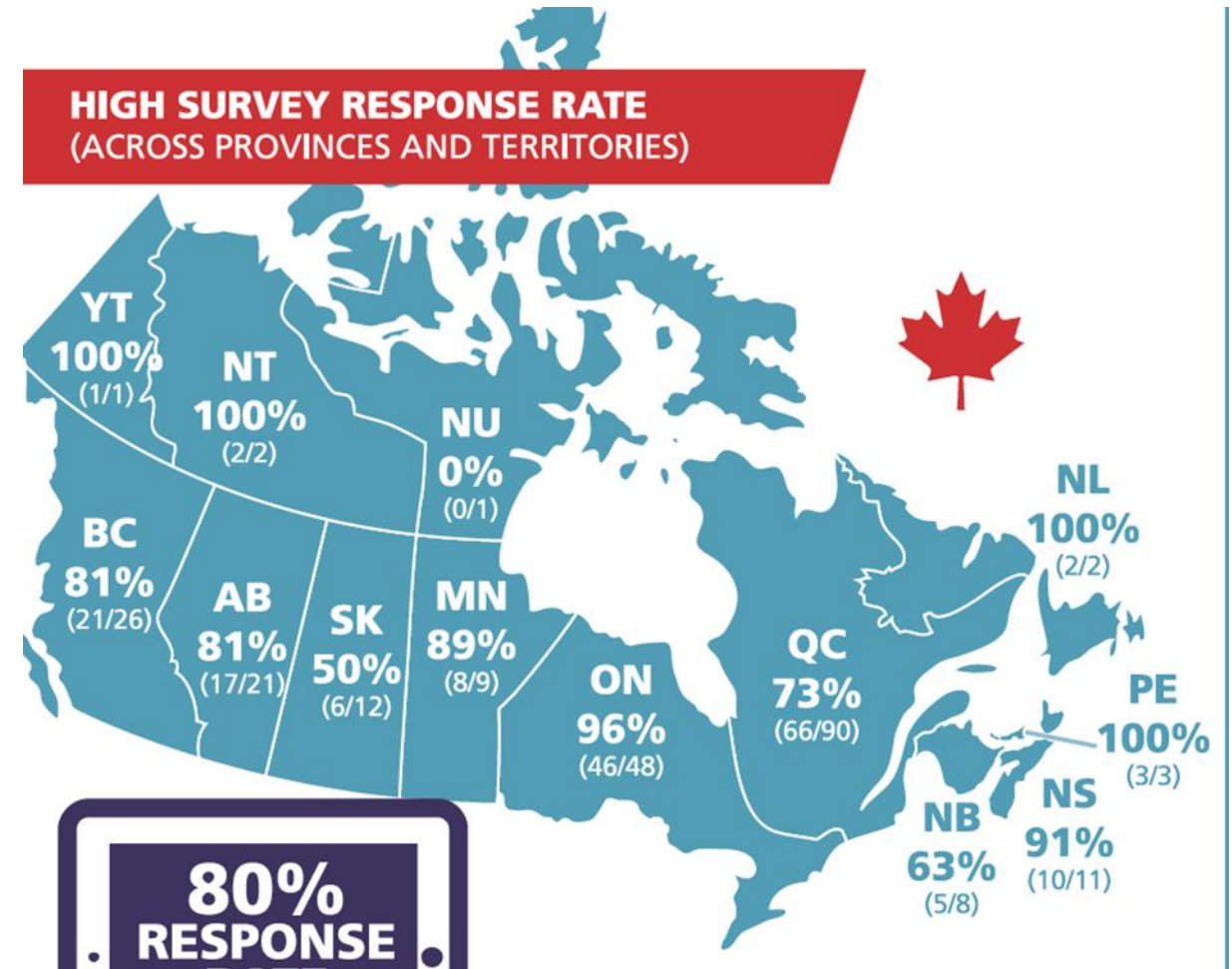
# Expanded Roster of Institutions

- # of changes in universities and colleges
- Inclusion of private-subsidized colleges Quebec
- Survey conducted June – August, 2018

	2017	2018
<b>Universities</b>	<b>72</b>	<b>82</b>
<b>Colleges outside Québec</b>	<b>81</b>	<b>80</b>
<b>CEGEPs</b>	<b>50</b>	<b>51</b>
<b>Private subsidised</b>	<b>0</b>	<b>21</b>
<b>Québec colleges</b>	<b>50</b>	<b>72</b>
<b>Total</b>	<b>203</b>	<b>234</b>

# Main results 2017 and 2018

- Response rate:
  - 2017: institutions **69%**
    - Student population **78%**
  - 2018: institutions: **80%**
    - Represents **92%** of **students** in *publicly funded, post-secondary for credit education*
  - Ontario institutions 2018: **96%**



# Much improved data

<b>2016/17 Academic Year</b>		<b>Key Enrollment Results</b>
<b>Individual students taking at least one online course</b>	<b>Total # of individual students enrolled</b>	<b>Percentage of students taking at least one course</b>
<b>Student course registrations in online courses</b>	<b>Total # student course registrations</b>	<b>Percentage of all enrollments online</b>

# Main results: 2017 and 2018

- Nearly all PSIs offer DE for credit
- Online learning mature market in Canada: 15 years +

## **Online, for-credit:**

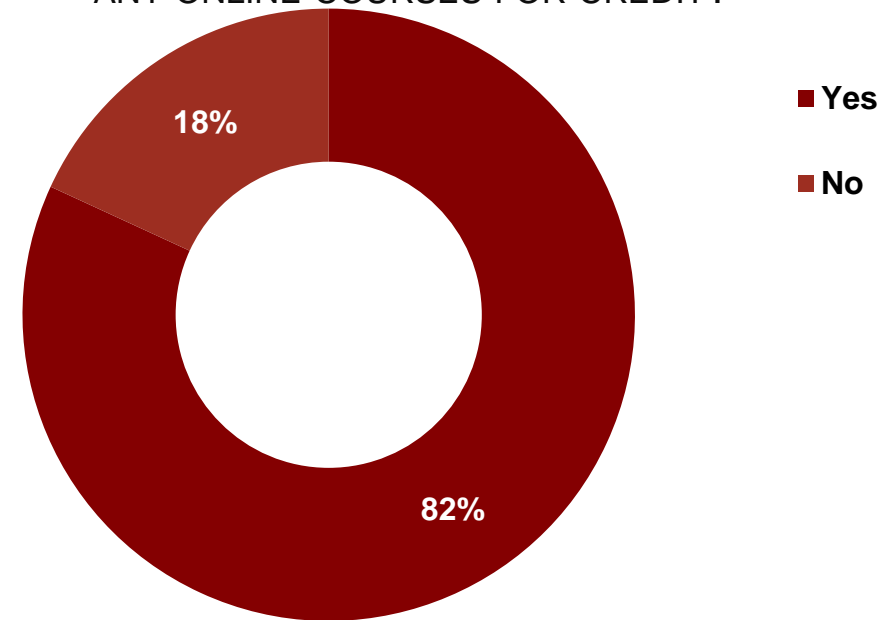
- **88%** universities
- **80%** colleges outside of Quebec
- **59%** CEGEPs
- Ontario: **all** colleges & **21/22** universities



# Main results: online enrolments

- Better data this year: 131 out of 160 institutions with online learning: **83%**
- **8%** of all credit course enrolments are online (universities and colleges)
- **One in five** students (**20%**) taking at least **one online** course
- Colleges in Quebec (**4%**)

DOES YOUR INSTITUTION CURRENTLY OFFER ANY ONLINE COURSES FOR CREDIT?



# National Online Enrollments



1. More than **1.3 million** (fully online) credit course registrations in 2016-17
  - **8%** of all credit-based *except Quebec colleges (4%)*
2. More than 365,000 students taken at least one online course
  - *at least 20%* of for-credit students *except Quebec colleges*
  - United States: *at least 33%* (Lederman, IHE, Nov 7, 2018)

# Main results: Ontario online enrolments

- Students taking **at least 1 online** course:
- Universities: **19%**
- Colleges: **21%**
  - Nearly **150,000** students

## Online course registrations:

- **8%** universities
  - **7%** colleges
  - **550,000** online course registrations



# Main results: Ontario online enrolments

- Two-thirds reported online enrolments up from last year
- 73% expect enrolments will increase next year
- in **Ontario** – **83%** expect **increase**



**Majority** of Canadian publicly-funded  
post-secondary institutions  
**very strongly endorse &**  
**believe online learning** is a  
**critical** part of their offerings

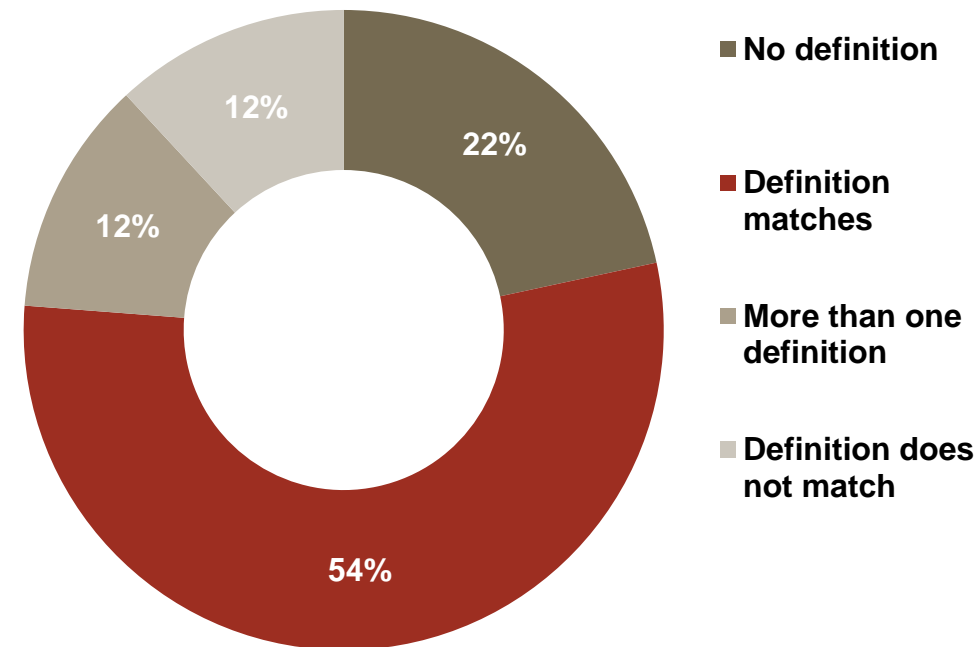
# Defining key terms

## Distance education course:

are those where **no classes** are held **on campus**  
– **all instruction** is conducted at a **distance**.

Ontario institutions: **70% Match**

DOES YOUR INSTITUTION'S DISTANCE  
EDUCATION DEFINITION MATCH THE ONE  
ABOVE?



# 65% Match: Online

## Online Course:

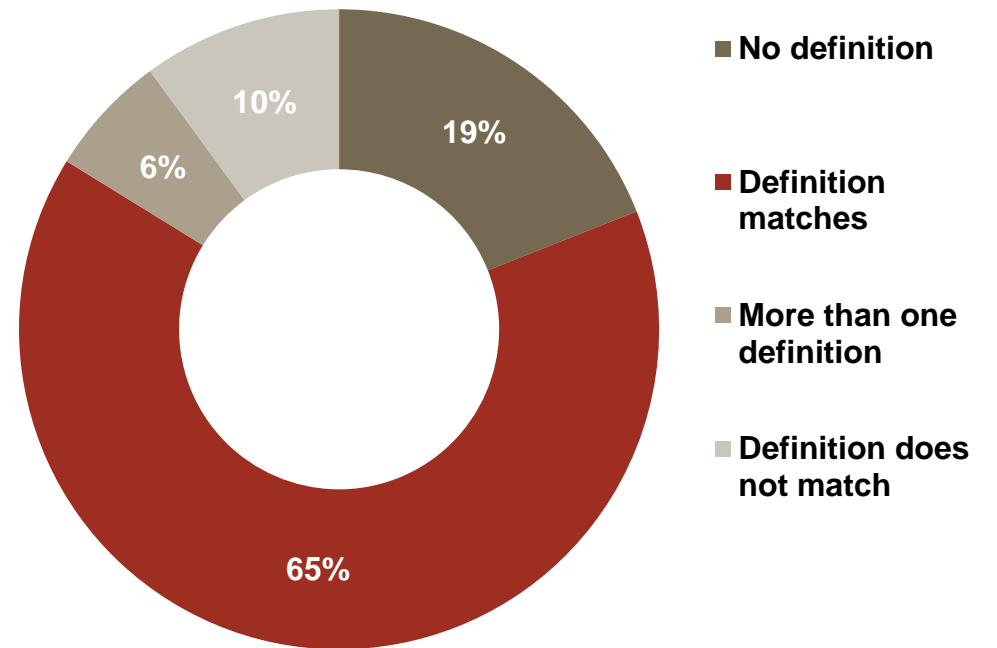
A form of distance education where the **primary delivery mechanism is via the internet**.

These could be delivered **synchronously** or **asynchronously**.

All instruction is conducted at a distance.

Ontario institutions: **83% Match**

DOES YOUR INSTITUTION'S ONLINE EDUCATION DEFINITION MATCH THE ONE ABOVE?

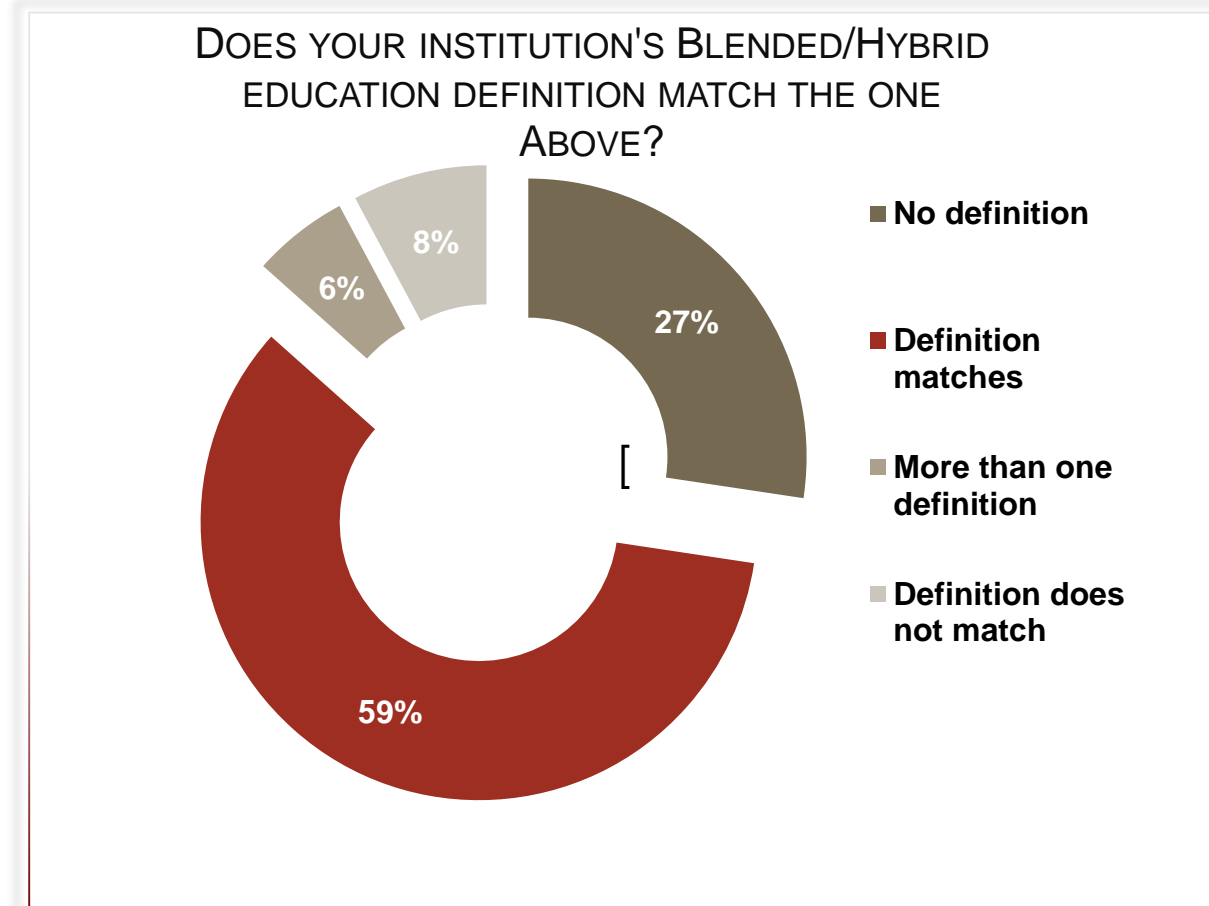


Ontario institutions: **74% Match**

## ■ **Blended/Hybrid course**

- *These are courses **designed to combine** both **online** and **face-to-face teaching** in any combination.)*
- *For the purposes of this questionnaire, we are interested in those courses **where some**, but not all, of the face-to-face teaching **has been replaced** by online study.*

# 59% Agreement Blended/Hybrid





# Defining key terms

Response	Distance Education	Online courses	Blended/hybrid
<b>Our definition matches the one listed</b>	55% <b>Ontario:70%</b>	65% <b>Ontario:83%</b>	59% <b>Ontario:74%</b>
<b>We have more than one definition in use</b>	12%	6%	5%
<b>Our definition does not match the one listed</b>	12%	10%	8%
<b>We don't have a definition</b>	22%	19%	27%
<b>Total</b>	100%	100%	100%
<b>Total responding to question</b>	185	183	184

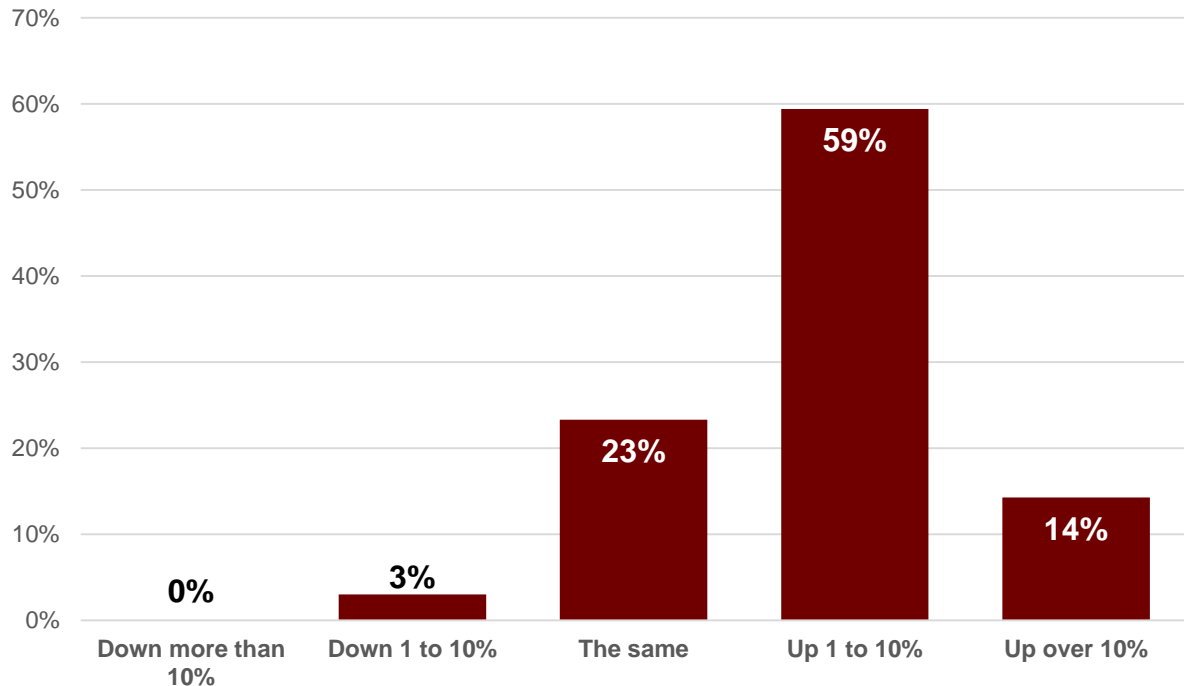
# Online Registrations - On the Rise

- **65%** identified an **increase** in online course registrations **over last year**

- 
- **74%** anticipate an **increase** in **next year's** online course registrations

- 
- Ontario: **83%** expect an increase next year

How do you expect next year's online course registrations to compare to this year's?



# OER Key Findings



- 100 of 167 institutions use open textbooks or 53%
- 54% have Open Education Practice (OEP)/OER training
- Varies by province – **BC** and **Ontario highest emergent interest** in OER/OEP
- Open Textbooks – used in face-to-face, distance, online and blended/hybrid courses
- Ontario:

Call for **professional development** in support of “**online and distributed learning strategic plan**”

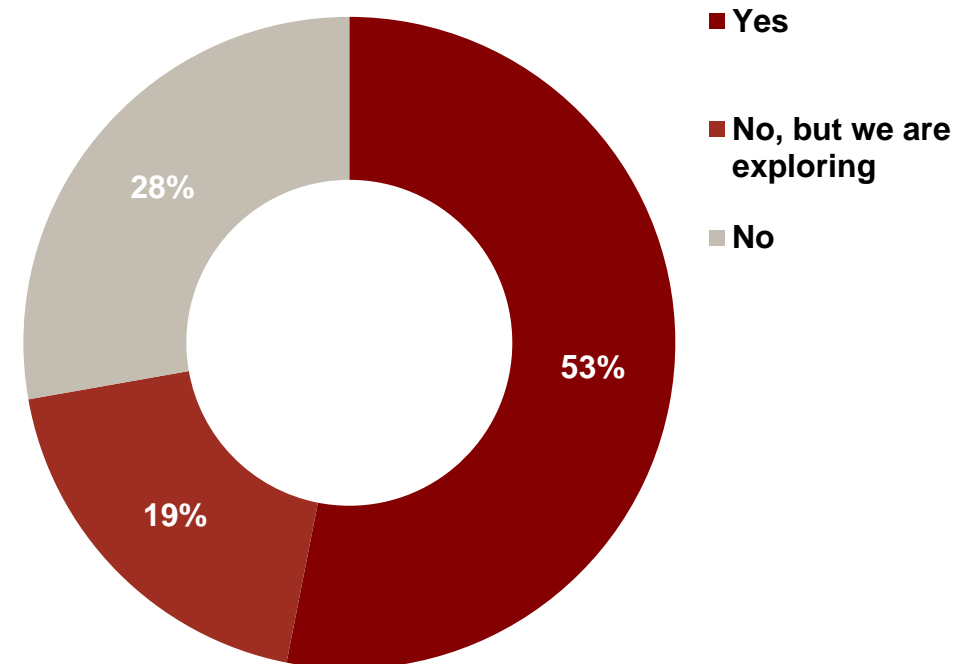
# Open Textbooks



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- **53%** of 167 responding institutions
  - **61%** of 69 Universities
  - **56%** of 59 Colleges
  - **36%** of 39 Quebec Colleges
- **Ontario: 61%**
- **British Columbia: 90%**

Are Open Textbooks used at your institution?

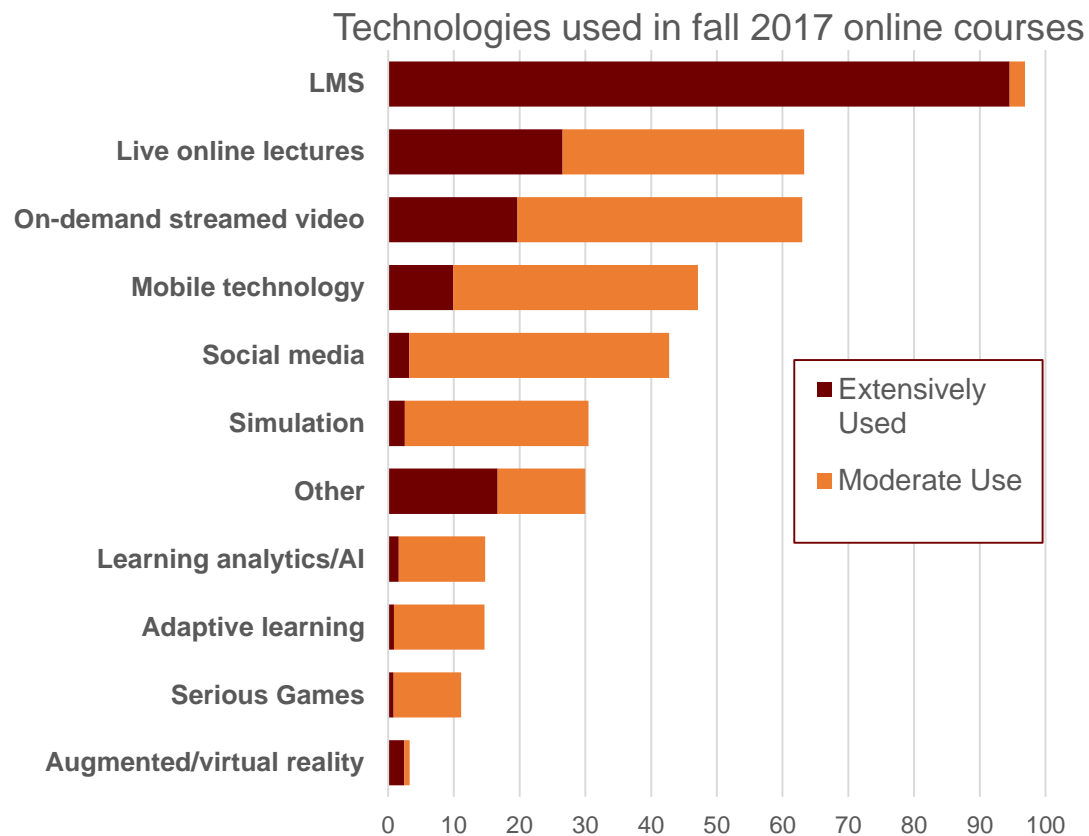


# What is needed to support faculty acceptance?

- “strong institutional commitment” and “**a clear vision communicated by leadership about what the educational offerings are expected to look like, including a fully articulated plan / blended learning strategy,**” and “**the technology needs to works consistently.**”
- “the need for **concrete evidence and research on online learning**”
- “the need to negotiate the **collective agreement**, taking into account the work context of a **21st century teacher.**”
- “**If we do not offer** distance courses **directly in our institution, our students will take** these distance courses **given by other institutions.**”

# Technologies

- **95%** LMS
- **65%** on-demand, streamed video
- **64%** live online lecture (33% in 2017)
- **55%** Mobile technology
- **48%** Social Media

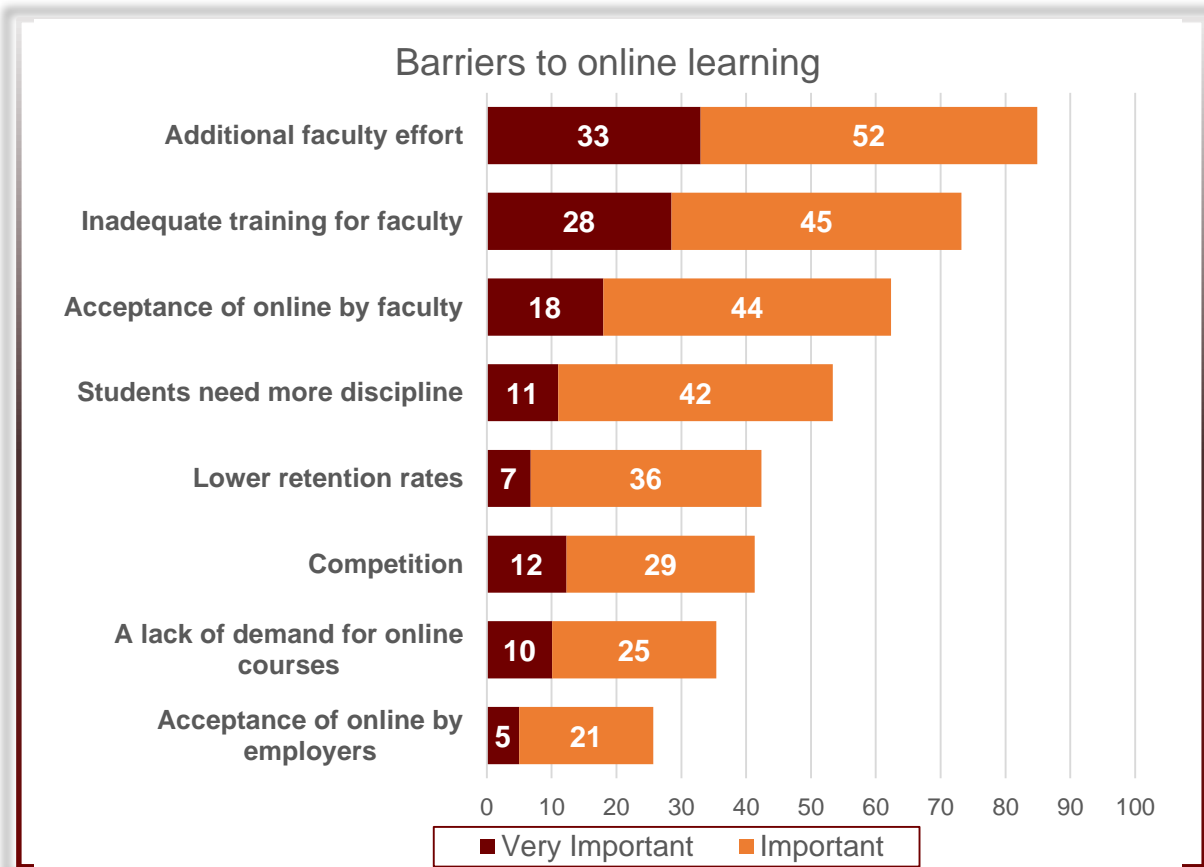


# Barriers

- **85%** Additional faculty time required

- **73%** Inadequate training and support

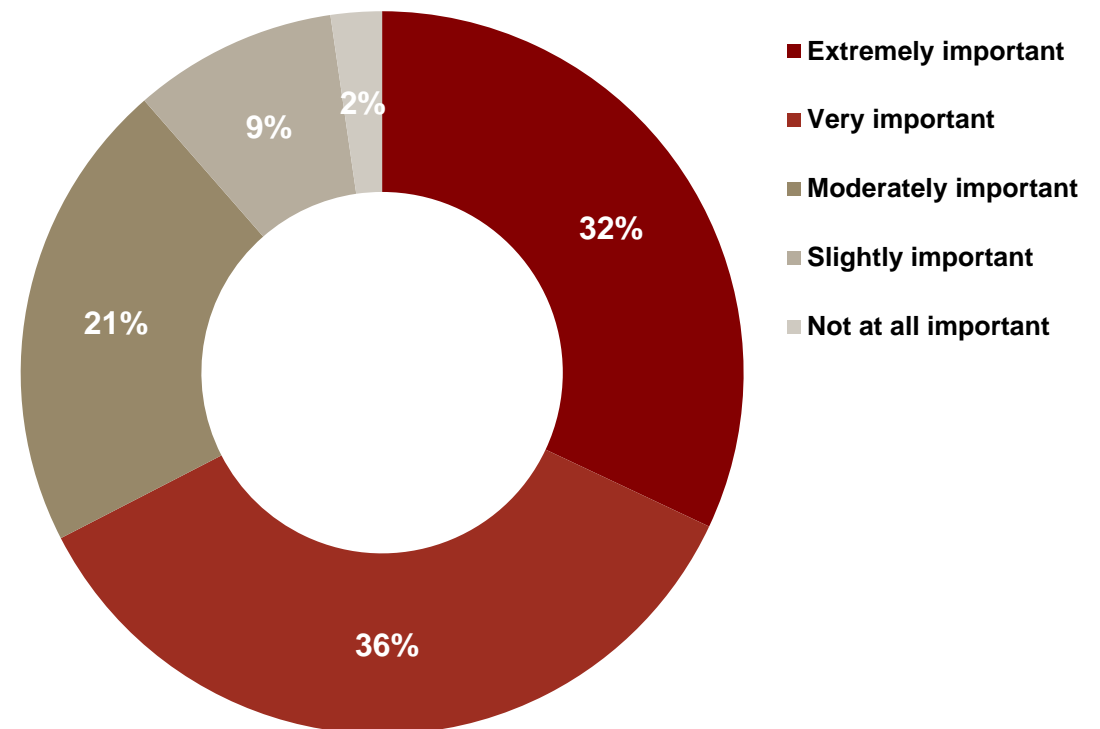
- **62%** Acceptance of online by faculty



# Institution Strategy or Academic Plan

- Very to Extremely important: **68%**
  - Ontario: **80%**
- Most (**72%**) have or are developing a strategy or plan for online learning
  - Ontario: **86%**

How important is online learning for your institution's long-term strategic or academic plan?

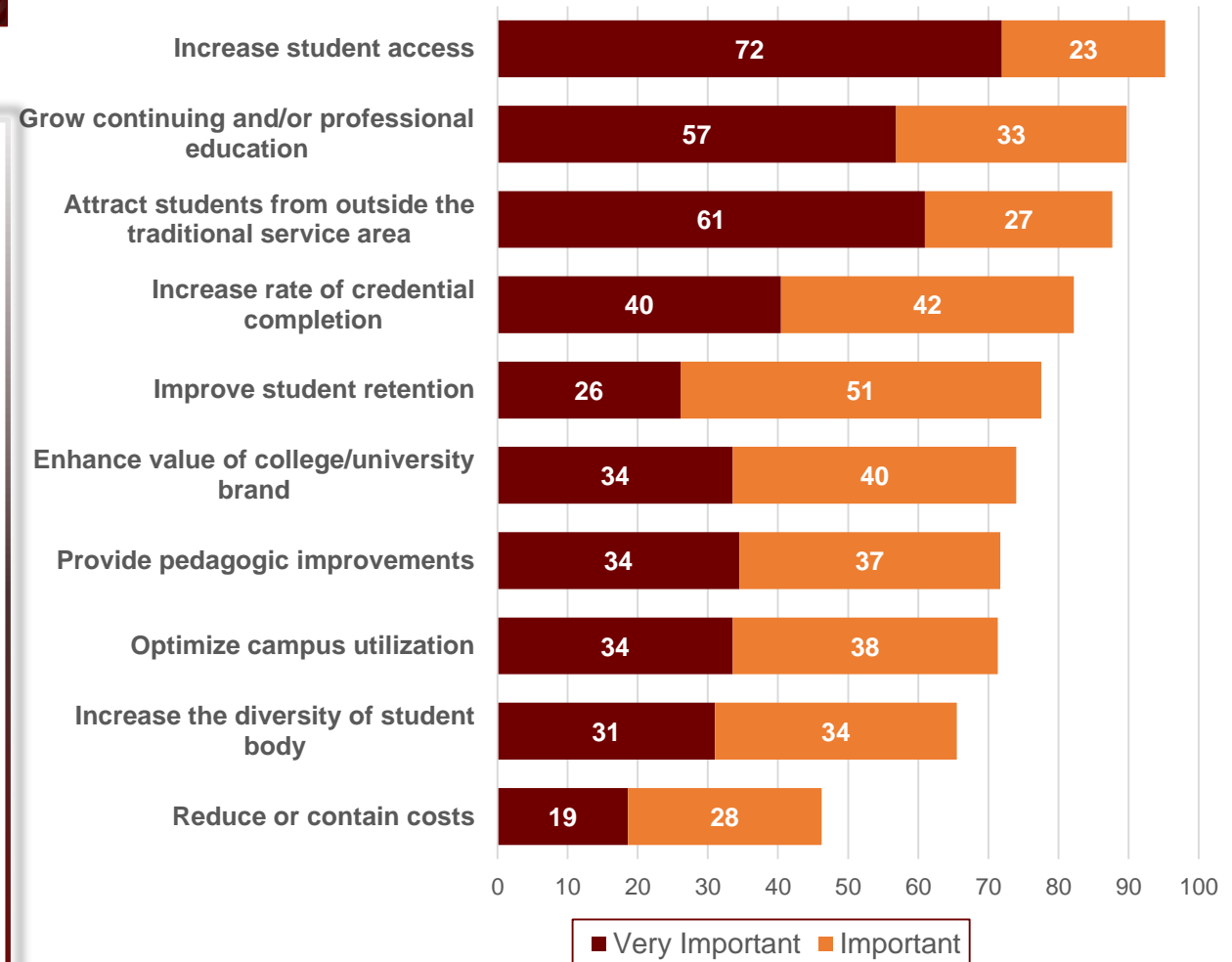




# Strategically Important

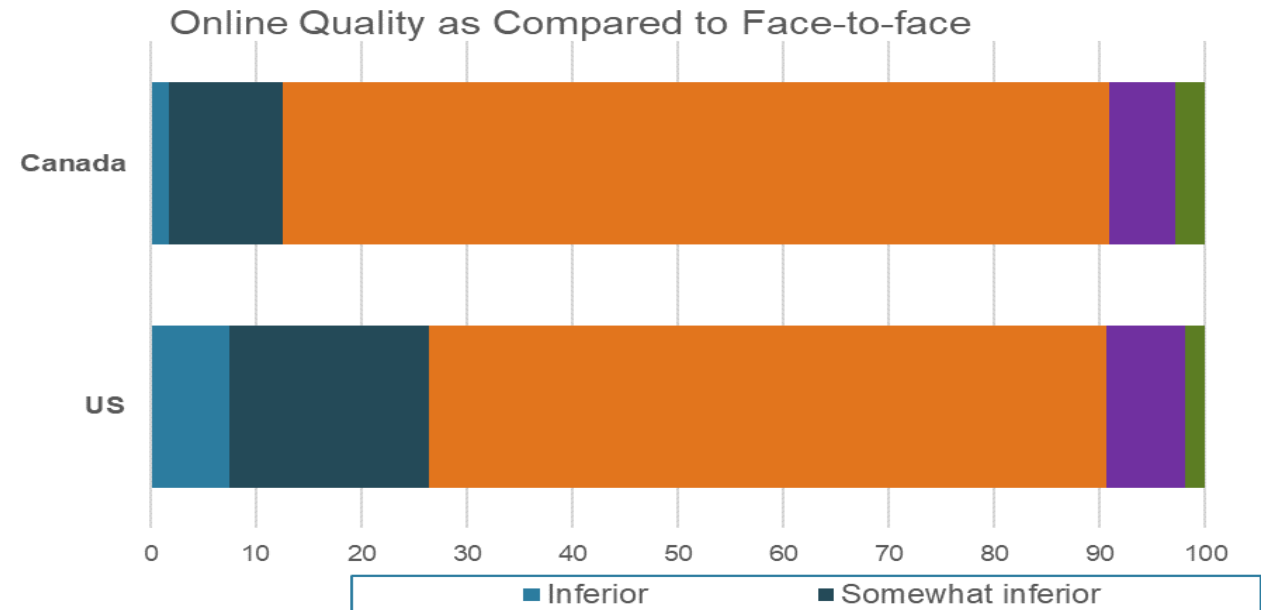
- Increase student access
- Grow continuing and/or professional education
- Attract students from outside traditional service area
- Increased rate of credential completion

## Online education is strategically important



# Online Quality

- **Blended/hybrid:**
  - **78% same** as face-to-face
  - **18% superior** to face-to-face
- **Online**
  - **78%** same as face-to-face
  - **10%** superior



# December 2018



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**Reports:**

**Full Technical & Public Report**

**Western Canada, Ontario, Quebec,**

**Atlantic**

**Open Data**

<https://onlinelearningsurveycanada.ca/>

<https://formationenligne canada.ca/>