

Tracking Online and Distance Education in Canadian Universities and Colleges: 2018

CANADIAN NATIONAL SURVEY OF ONLINE AND DISTANCE EDUCATION

QUÉBEC AND FRANCOPHONE INSTITUTIONS SUB-REPORT

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THE 2018 NATIONAL SURVEY RESEARCH TEAM

Dr. Tony Bates

CDLRA/ACRFL

Distinguished Visiting Professor, Chang School of Continuing Education,
Ryerson University; Research Associate, Contact North

Dr. Tricia Donovan

Executive Director, CDLRA/ACRFL

Former Director, eCampus Alberta

Dr. Jeff Seaman

Director, Babson Research Group. USA

Dr. Denis Mayer

CDLRA/ACRFL

Ancien vice-recteur adjoint, affaires étudiantes, Université Laurentienne

Éric Martel

Directeur adjoint - Formation à distance, Université Laval

Dr. Ross Paul

Former President, University of Windsor, Laurentian University

Dr. Brian Desbiens

Former President, Sir. Sanford Fleming College

Vivian Forssman

CDLRA/ACRFL

Former Director, Centre for Teaching and Educational Technologies,
Royal Roads University

Russ Poulin

Director, Policy and Analysis, WCET, USA

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As in 2017, the major part of the funding for the 2018 survey was provided by various provincial government organizations mandated to support online learning, plus lesser but significant contributions from the private sector. For 2018 the primary funding agencies were:

- eCampusOntario
- BCcampus
- Campus Manitoba
- Contact North
- OCAS
- Pearson Canada
- Government of Québec
- D2L

Also, in order to provide greater transparency in the management of funds, the survey team established itself in 2018 as a federally registered Canadian Not-for-Profit Corporation called the Canadian Digital Learning Research Association/ Association canadienne de recherche sur la formation en ligne (CDLRA/ACRFL).

Once again, the 2018 survey depended heavily on support from other organizations, including:

- Colleges and Institutes Canada (CICAN)
- Universities Canada
- Canadian Virtual University

Above all, though, this is a voluntary survey for institutions to complete. As in 2017, this year's survey required a good deal of work from many different people within the institutions to provide all the information requested. We are truly indebted to everyone who participated in the survey.

The 2018 Canadian National Online and Digital Education Survey is operated by the Canadian Digital Learning Research Association (CDLRA)/Association Canadienne de Recherche sur la Formation en Ligne (ACRFL), a federally incorporated not-for-profit organization. CDLRA/ACRFL was established to engage in research and publish information regarding online and digital learning in the Canadian education system. Dr. Tricia Donovan serves as the Executive Director, and Dr. Tony Bates and Dr. Denis Mayer serve as Directors of the Board.

EXECUTIVE SUMMARY

The public report on the results of the 2018 Canadian National Survey of Online and Distance Education conducted in summer, 2018 is available at <https://onlinelearningsurveycanada.ca/>. This sub-report includes the national results from across the country **and highlights from Québec post-secondary institutions and Francophone institutions outside of Québec. The Québec and Francophone institution specific results are presented in bold text for each area.** Unless otherwise noted, the results presented include those collected from across the country.

The 2018 survey received an 80% response rate from across the country, which represents 187 responses out of our roster of 234 public institutions. Responses were highly representative of institution type, province and size of institution.

In 2018, the National Survey treated francophone affiliated institutions as separate institutions in order to facilitate responses from these institutions. **The response from Québec was strong with 66 of 90 (73%) institutions responding.**

An additional 11 French survey responses were received from institutions across the country, outside of Québec.

This report provides the results of a national survey conducted in the summer of 2018 of all Canadian public post-secondary institutions. The survey universe consisted of 234 institutions and 187 responses. A description of the methodology is presented at the end of this report in an appendix.

The National responses are included herein for comparison with the responses from the French and English institutions in Québec and the Francophone institutions located outside of Québec.

The response rate from Québec in 2018 was 73%, with 66 of 90 institutions responding, compared to a 60% response rate in 2017 (Note the private subsidized colleges were not included in 2017). Of the 66 responses from Québec, 59 completed the French language survey and 7 completed the English language survey. Only a very few private subsidized colleges responded to the survey (8/21) and these results need to be interpreted with caution.

Across Canada, nearly two-thirds (63%) of the respondents to the 2018 survey completed English language surveys and 37% were identified as French language institutions.

In nearly all instances, the results from the Québec universities and the Francophone institutions outside of Québec were more closely aligned with the universities in the rest of Canada, than with colleges in Québec. The same cannot be said for the results from the CEGEPs and private subsidized colleges in Québec, as their results differ considerably from colleges located outside of Québec.

The study results show an increase in online enrolment in Québec universities. In fact, 20% of Québec university students took at least one online course in 2016-2017, and 10% of university course enrolments were in online courses. These figures are higher than the national average (17% and 8%, respectively) and an indication that online education in Québec universities is healthy, mature and thriving.

An analysis of survey participation reveals that 47 of the 74 institutions with no online course enrolments were in Québec. Given that 88% of the universities in Québec offered online courses, the vast majority of institutions with no online course offerings were CÉGEPs and private subsidized colleges. While CÉGEPs continue to develop their online courses and programs to meet the needs of their student population seeking flexibility, the incidence of online education is still lower in the Québec college system than in its universities or colleges in other provinces. The unique situation of CÉGEPs, which issue college diplomas or attestations of college studies for pre-university or vocational programs in a given geographic area, as well as the age range, which differs from that of college students in other provinces, may partly explain the fact that their online education is not as developed.

Furthermore, while a centralized system for distance education at the college level has traditionally allowed most students to take one or more courses in another CÉGEP (with *commandite* authorization under a partnership agreement), CÉGEPs are increasingly developing their own online education offerings to meet their students' needs. Similarly, private subsidized colleges offer more face-to-face courses but are also interested in online learning.

The varying levels of online education maturity between university and college-level institutions likely explains the different level of agreement with the survey definitions compared with the national averages. The need for structure and consistency in working towards a common language is perhaps not a priority in some institutions just starting to roll out their online course offering.

At 35%, Québec's rate of open textbook use is low. While institution usage rates in provinces such as British Columbia (90%) and Alberta (78%) are high due to organizations actively promoting open textbooks, such organizations do not currently exist in Québec. Given that open education resources, most of which are in English, are gaining popularity elsewhere in Canada, it would be interesting to monitor the progress of French language open textbooks used by Québec institutions over the coming years.

In Québec, the percentage of institutions offering online education is lower than in other provinces and territories but has increased from 41% in 2008-2010 to 59% in 2016. The percentage is much higher for the Québec universities where those offering online courses increased from 63% in 2008-2010 to 88% in 2016, which is higher than the national average of 83%.

In Québec, the universities have the highest participation rates in online courses, where 20% of students took at least one online course, and 10% of all university credit course enrolments were in online courses. These figures are slightly higher than the rest of the country (17% and 8% respectively).

In the CEGEPS, 4% of students took at least one online course and 2% of all college credit course enrolments were in online courses. The proportion of students who took at least one online course in private subsidized colleges was 3%, and online enrollments accounted for 3% of all course registrations, a much lower rate than the rest of Canada.

In 2016/17, students in Québec universities took an average of 8.6 courses a year, and where there are online students in Québec universities, they are taking up to half of their full course load online. Students in the CEGEPs took an average 10 courses per year and 5.5 were online.

Nearly all of the responding CEGEPs (89%) forecast an increase in registrations for the coming year of between 1% and more than 10% and 73% of Québec universities reported an increase in their online course registrations. Just 3 private subsidized institutions in Québec responded to this question and one indicated they anticipate their online course registrations to stay the same and the other two forecast an increase.

Extent of Activity

In 2018, the response from Québec institutions was higher than in 2017, aided partially by efforts within Québec to raise awareness of the survey and the inclusion of the private subsidized colleges in the province. Members of the Québec post-secondary system requested that we include this category of institutions in the 2018 survey as they do have official status from the Québec Ministry. Thus, the roster of institutions invited to participate in the 2018 survey, in Québec includes 90 institutions.

The response rate differed by type of institution: 100% of 18 Universities in Québec responded; 78% (40 out of 51) of the CEGEPs and 38% (8 out of 21) of the private subsidized institutions completed the survey. A total of 66 institutions in Québec completed the survey, 59 completed the French version of the questionnaire while 7 completed the questionnaire in the English language.

An additional 11 French surveys responses were received from Francophone institutions located outside of Québec. The results from these institutions are included in the provincial and territory analysis and results, however, we have included select results within sections of this report in order to provide a more complete tracking of Francophone results Canada-wide.

The results of the survey clearly demonstrate that online learning is alive and well with a strong annual growth in online enrolments and more than two-thirds of Canadian public institutions are offering online learning. Nearly all Canadian universities and colleges outside of Québec offer distance education courses for credit.

Definitions

The 2017 survey showed a lack of agreement on definitions of the terms used to describe courses that are offered as 'distance education', 'online' or 'blended/hybrid'. For 2018, institutions were asked to identify if they had a definition at their institution and if so, did it match the one presented in the survey.

Across Canada, between a half and two-thirds of the respondents reported that their internal definition matched that provided in the survey. There was more agreement on the definition of online courses and less on the definition of distance education. Perhaps more significantly, between a fifth to a quarter of the institutions have no definitions of these terms.

The responses from Québec universities indicate a 59% match to the survey definition of *distance education*; and slightly lower than half (45%) of the CEGEPs and private subsidized college indicated a match. The level of agreement was much higher for the Francophone institutions outside of Québec, where 82% of the responses reported that their definition matched that provided by the survey.

Two-thirds (66%) of universities located outside of Québec reported a match to the survey definition of an *online course*, while a slightly lower proportion (59%) of Québec universities agreed that their definition of an online course matched that provided by the survey.

Colleges outside of Québec were more likely to identify a match with the survey definition of an online course (80%). The CEGEPs and private subsidized colleges in Québec were least likely to identify a match with the survey definition (40% and 38% respectively).

Taken collectively, more institutions in Québec did not have a definition for an online course than the rest of Canada, with 37% reporting they do not have a definition. The low level of agreement may be related to a translation or language issue and is an area that we need to explore further.

Nearly all of the institutions that provided a French language survey response from outside of Québec offer online courses for credit and had a much higher match to the survey definition of an *online course* (91%).

For *blended/hybrid courses*, institutions within Québec reported a 52% match to the survey definition and Francophone institutions outside of Québec reported a 73% match.

There was a much higher rate of agreement to the blended/hybrid definition in colleges located outside of Québec (70%) then in the CEGEPs (53%) and the private subsidized colleges (50%).

Distance and Online Course Offerings

In 2018, 83% of responding institutions across Canada offered distance education courses for credit, the same percentage as in 2017, and 83% offered online courses for credit, also the same proportion as in 2017.

Size of institution is very much a determining factor for online offerings Canada wide. Over half of the institutions with fewer than 1,000 students (52%) did not offer online courses, while almost every institution with more than 10,000 students did.

When the types of institution are combined, the results show that nearly two thirds of the institutions in Québec (63%) offer distance education courses for credit. This rate is higher for the Québec universities where 78% indicate they offer distance education courses for credit. The response was lower for the private subsidized colleges (57%) and CEGEPs (58%) in Québec.

The results from the Québec universities for many of the survey questions are comparable to the response from universities located outside of Québec and the responses from the CEGEPs and private subsidized colleges are less comparable with the French and English colleges outside of Québec.

This was the first year that the private subsidized colleges were included in the survey and despite a very low participation (8/21), there is still much to learn about online and digital education the Québec post-secondary system.

Nearly all (88%) of the universities in Québec offer online courses, while 93% of all universities across Canada offer online courses. This is much lower for the CEGEPs (56%) and the private subsidized colleges (38%), then for colleges located outside of Québec, where 91% indicate they offer online courses for credit.

All of the Francophone institutions outside of Québec and 93% of the Anglophone institutions reported they currently offer online courses for credit, while nearly two-thirds (62%) of institutions within Québec offer online courses. Participation in online course offerings in the Francophone institutions outside of Québec may be influenced by the online activity at the affiliated institution or others in their jurisdiction.

The 2018 findings show a significant increase in the number of institutions offering online courses between 2010 and 2011 (from 68% in 2010 to 76% in 2011), and then a more gradual increase between 2011 and 2016 (from 76% in 2011 to 79% in 2016).

In Québec, when institution types are combined, just over half (56%) of the responding institutions have been offering online courses since 2012. Again, it varies considerably by institution type: universities (76%), CEGEPs (50%) and private subsidized (38%).

The main growth has come from the very small institutions. In 2008, only 14 responding institutions with fewer than 2,000 students were offering online programs, but by 2016 this had grown to 26, almost doubling in numbers.

As was first noted in the 2017 study, Canadian post-secondary education appears to be a mature market for online learning. Many have been offering online courses for 15 years or more.

Online Course Enrolments

In 2016-2017, 18% of all Canadian post-secondary students were taking at least one online course for credit, 19% in universities, and 21% in colleges outside Québec.

Of all credit course enrolments, about 8% were fully online, representing 1,357,000 online course registrations. If the online course enrolments are converted to full time equivalents, this would be equal to about four universities of 27,500 each, four colleges of 10,000 each, and a Cégep of 3,500.

The average course load for students taking online courses was between 3 to 4 online courses a year. Overall course loads ranged from 7-8 courses a year in universities to around 10 courses a year in colleges.

Across the country, there has been a steady growth in online enrolments between 2015-2016 and 2016-2017, with almost two thirds of institutions showing growth in online enrolments from last year, and fewer than a quarter showing a decline. The expectations for next year are even higher, with three-quarters reporting likely growth and only 3% expecting a decline in enrolments.

In Québec, the percentage of institutions offering online education is lower than in other provinces and territories but has increased from 41% in 2008-2010 to 59% in 2016. The percentage is much higher for the Québec universities where those offering online courses increased from 63% in 2008-2010 to 88% in 2016, which is higher than the national average of 83%.

In Québec, the universities have the highest participation rates in online courses, where 20% of students took at least one online course, and 10% of all university credit course enrolments were in online courses. These figures are slightly higher than the rest of the country (17% and 8% respectively).

In the CEGEPS, 4% of students took at least one online course and 2% of all college credit course enrolments were in online courses. The proportion of students who took at least one online course in private subsidized colleges was 3%, and online enrollments accounted for 3% of all course registrations, a much lower rate than the rest of Canada.

In 2016/17, students in Québec universities took an average of 8.6 courses a year, and where there are online students in Québec universities, they are taking up to half of their

full course load online. Students in the CEGEPs took an average 10 courses per year and 5.5 were online.

Nearly all of the responding CEGEPs (89%) forecast an increase in registrations for the coming year of between 1% and more than 10% and 73% of Québec universities reported an increase in their online course registrations. Just 3 private subsidized institutions in Québec responded to this question and one indicated they anticipate their online course registrations to stay the same and the other two forecast an increase.

Blended/hybrid Learning

Blended/hybrid learning courses are offered by 78% of the reporting institutions, a rate that varies considerable by type of institution:

- 87%: universities
- 84%: colleges outside Québec
- 58%: CEGEPs
- 43%: private subsidized colleges in Québec

The proportion of blended/hybrid courses overall is slightly lower than the national average of 56%; and a higher proportion of Québec institutions are intending to offer courses in this format, 24% compared to 10% Nationally.

Nearly three-quarters (73%) of Québec universities offer blended/hybrid courses and 89% of universities located outside of Québec offer blended/hybrid courses.

The 2018 findings reinforce the conclusion from the 2017 survey that more than three quarters of Canadian institutions are now integrating online with classroom teaching, but no more than one in five have a significant number of courses in this format.

Open Educational Resources, Practices and Open Textbooks

A substantial number of Canadian post-secondary institutions (just over half) are using open textbooks and a further fifth are exploring their use. Universities and larger institutions are most likely to adopt open textbooks. The highest proportions of institutions using open textbooks were in British Columbia (90%) and Alberta (78%). Open textbooks are being used in all modes of delivery, but mostly in face-to-face courses.

Survey responses indicate that 19 of 55 institutions in Québec (35%) use open textbooks, which is much lower than the National average of 53%. Only a small number of universities in Québec indicated they use open textbooks with 5 of 16 responses (31%), while 70% of universities across Canada reported using open textbooks. Limited availability of French language open education resources and open textbooks may influence the adoption and use of open textbooks.

Québec institutions were also asked to indicate *where* they used open textbooks. Of the 19 institutions that responded to this question, 13 (69%) reported that open textbooks were used in face-to-face classes; 12 (63%) use them in online courses and 7 (37%) indicate that they use open textbooks in blended/hybrid classes.

None of the Québec institutions reported that they track cost savings as a result of using open textbooks.

Continuing Education

The response from the Québec institutions on continuing education mirrors that of the rest of the country, with nearly all (94%) of responding institutions indicating their institution offers continuing education and 6% do not. The percentage of private subsidized colleges was much lower, with 5 of 8 (63%) reporting that they offer continuing education courses.

Continuing education is offered by 93% of both Anglophone and Francophone responding institutions. Continuing education is offered both for-credit and not-for-credit, and institutions take advantage of face-to-face, online and blended/hybrid delivery methods. Face-to-face, not-for-credit courses were the choice most selected by responding institutions (87%).

Technologies

The majority of Québec responding institutions (84%) report using an LMS extensively for their online courses. All of the Québec universities and the private subsidized colleges reported extensive use of an LMS, while just 69% of the CEGEPs responded that they use an LMS extensively.

Across the country, 95% of all responding institutions indicated they use an LMS extensively in their distance and online offerings.

Learning Management Systems (LMS) continue to be the backbone technology used by institutions for their online and blended/hybrid courses. Nearly all institutions are combining various web-based technologies to augment the LMS and support increased interaction and engagement in their courses.

MOOCs

In Québec, eleven of 63 institutions (18%) indicated they have offered MOOCs in the last twelve months, and 10 of 55 responding institutions indicated they would be open to supporting faculty interest and increased MOOC support in the future.

There is relatively little MOOC activity in Canadian institutions, with only 18% having offered MOOCs in the previous year, with most offering between one to five MOOCs in the last 12

months. Most institutions either have no interest in offering MOOCs in the future (36%) or are unsure of their future plans for MOOCs (40%). Only 13% reported that they were willing to support the increased use of MOOCs in future, with the remaining 11% leaving it to individual faculty to decide without necessarily providing institutional support.

Policies and Practices

Online learning is 'very' or 'extremely' important for the institution's long-term strategic or academic plan in 68% of responding institutions across the country. Most institutions recognize the importance of having a plan or strategy for e-learning:

- 65% either had a plan or were developing one;
- Just under a third (30%) did not have a plan, but reported that they needed one;
- Only 5% reported that a plan or strategy was not needed.

Institutions reported that faculty on balance accepted the value and legitimacy of online learning and a clear majority of responding institutions (61%) reported that students were at least as satisfied with online courses as with face-to-face courses. There was also general agreement among the institutions that students need more discipline to succeed in online courses;

Online course learning outcomes are considered by most institutions to be the same as for face-to-face courses, although a few institutions (11%) thought online were inferior. Likewise, most institutions considered blended/hybrid learning outcomes to be of the same quality as face-to-face courses, although a few institutions (19%) thought blended/hybrid were superior.

Institutions reported that the most important strategic reason for online learning was to increase student access, with 95% of institutions rating it as either important (23%) or very important (72%); similarly, online learning was considered important for accessing students from outside the regular catchment area (88% reported this as important or very important).

The most significant barrier to online learning was identified as the additional faculty effort required to develop or deliver online courses (85%), followed closely by inadequate training/pedagogical knowledge available for faculty in online learning (73%), then lack of acceptance of online instruction by faculty (62%).

Institutions in Québec were slightly less likely to report that online learning was very important or extremely important for their long term strategic or academic plans. Of the 45 institutions that responded to this question, 60% selected very important or extremely important, while 20% selected moderately or slightly important.

Nearly three-quarters (72%) of the Francophone institutions outside of Québec reported that online learning was very important to extremely important to their long term strategic or academic plan.

Comparisons with the USA

Distance education is more firmly established in the United States than it is in Canada, with 33% of U.S. higher education students taking at least one distance course as of fall 2017, compared with approximately 18% in Canada.

Leaders in the U.S. appear to be further along in actually implementing their strategic plan with a larger proportion of those in the U.S. reporting that they are now implementing a plan (38% compared to only 21% in Canada), while more Canadian institutions report that they need a plan, but they have not yet begun working on it (30% in Canada compared to 13% in the U.S.)

Academic leaders in the United States have a more positive view of the relative learning outcomes for blended/hybrid courses, with 30% thinking they were superior to those of face-to-face instruction, compared to only 19% in Canada.

In all other areas measured, Canadian leaders have a much more positive view of online education than do the leaders in the United States. Only 21% of the U.S. respondents believe that online credentials have the same level of respect as face-to-face credentials, compared to over one-half (54%) of the Canadian respondents. Likewise, Canadian academic leaders are twice as likely to report that students are at least as satisfied with an online course as they are with a face-to-face course (50% compared to only 27% among U.S. leaders).

There is a big difference between Canada and the USA between those who believe learning outcomes in online courses to be inferior - only 6% of the Canadian respondents reported this, while over a quarter (26%) of U.S. leaders thought that this was true.

There was no specific comparison with Québec institution responses and a US response. Details of our Canada US comparison are available in the Public and Technical Reports.

Future Directions

The evidence suggests that online and increasingly, blended and hybrid learning are not only a small but important part of Canadian post-secondary education, but they are likely to continue to expand and grow. In particular, most institutions recognize that online learning is critical for their future, and have ensured that it is of generally high quality.

The challenge for institutions is to make sure they are properly prepared for these developments, and especially for the impact of scaling up online and digital learning activities. We hope this report will be of help and assistance to institutions as they increasingly maneuver into digital learning environments.

INTRODUCTION

This report represents the second annual effort at tracking distance and digital learning among publicly funded post-secondary institutions in Canada. This effort began with the construction of a comprehensive roster of all publicly funded post-secondary institutions, which for 2018 includes¹:

- 82 universities and Francophone colleges affiliated with Anglophone universities
- 80 colleges outside Québec
- 51 CÉGEPs
- 21 private subsidized colleges in Québec

	2017			2018		
	Resp.	Pop.	%	Resp.	Pop.	%
Universities	56	72	77%	75	82	92%
Colleges (except Québec)	55	81	68%	64	80	80%
CÉGEPs (Québec)	29	50	58%	40	51	78%
Private subsidized (Québec)	n/a	n/a	n/a	8	21	38%
Total	140	203	69	187	234	80%

Resp. = responding institutions; Pop. = all institutions in roster

Table 1.0 Response rate nationally by type of institution response

The overall institutional response rate to the survey was 80% from all types of institutions.

The resulting National roster includes 152 colleges and 82 universities for a total of 234 institutions. In Québec, 90 institutions were invited to respond and 66 (73%) completed the survey.

Responses were highest from universities (92%) and lowest from the **21 private subsidized colleges in Québec which were added to the roster this year (38%)**. If the 21 private subsidized colleges in Québec were excluded, the response rate is 84%, compared with 69% for last year's similar roster base.

¹ A full listing of the Québec roster is provided at the end of this report, and specific details on how it was developed and differs from that used in 2017 are provided in the methodology section of the report.

The 2018 questionnaire was developed, building on prior work of the Babson Survey Research Group in the U.S. and the prior year's Canadian survey and report. All institutions on the roster were invited to participate, with invitations going to the Provost/VP Academic or Vice-President Education or Directeur général at each institution, with copies to other institutional contacts.

Responses were initially submitted online using a unique link for each institution, and later also using a shareable PDF. Members of the project team actively followed up with institutions to address their questions and encourage them to participate.

Overall, the responses provide an excellent, representative sample of colleges and universities across all provinces, and across all sizes of institution, representing 80% of all institutions and 92% of all students studying for institutional credit at Canadian public post-secondary institutions.

THE RESPONSE FROM QUÉBEC AND FRANCOPHONE INSTITUTIONS

As we noted in the Inter-provincial Differences Report in 2017, the post-secondary system in Québec differs from the rest of the country, particularly at the college level where there are two categories for colleges: CEGEPs and semi-privatized institutions.

Québec's college system, although publicly funded, is fundamentally different from the rest of Canada. Although CÉGEPs (Collèges d'enseignement général et professionnel) provide both academic programs that prepare students for university as well as vocational programs, the CÉGEPs often offer a different mix of programs and age ranges found in colleges in other provinces.

Thus in 2017 a distinction was made between colleges (anglophone and francophone) outside Québec, and the CÉGEPs. In 2017 we included 50 CÉGEPs in our roster. Again, as a result of feedback from the 2017 study, we added two more fully funded provincial professional colleges to the 2018 CÉGEPs roster, and reduced two separate CÉGEP entities to one, as the distance education entity was part of the main institution, making a total of 51 for 2018.

Another difference we discovered is that in Québec 'private subsidized colleges are establishments recognized as a public interest and approved for subsidies by the Minister responsible for Higher Education' and are fully accredited within the province. Thus, for 2018 we added these [21 publicly subsidized colleges](#) to the roster.

As a result of feedback regarding the 2017 study, we decided in 2018 to treat as a separate roster entry, the francophone colleges within anglophone universities, as they offer separate academic programs and because they require a separate questionnaire in French. This resulted in an additional five university-type institutions compared to those included in the 2017 survey. We added three Québec institutions to our roster of universities that had in 2017 been treated as constituent components of the Université de Montréal.

Hence, in 2018, our roster for Québec institutions included 90 post-secondary institutions.

- 18 Universities (15 French and 3 English)
- 51 CEGEPs
- 21 private subsidized colleges

The universities in Québec appear to be moving into online learning at about the same pace as the rest of the country (88% offer online). However, the college sector participation in online learning is lower than in other provinces and territories with just 58% of the CEGEPs offering online and 43% of the semi-privatized colleges.

The majority of universities in Québec are francophone, but there are also three anglophone universities in Québec. However, outside Québec, there are

- fully francophone universities,
- several mainly anglophone universities with separate francophone colleges.

In 2018, the roster of institutions was expanded as noted above. In Québec, 66 out of 90 institutions responded (73%): all 18 universities, 40 of 51 CEGEPs (78%) and 8 of 21 private subsidized colleges (38%) responded. See Table 1.1 below.

	2017			2018		
	Resp	Pop	%	Resp	Pop	%
Universities	10	15	67%	18	18	100%
CEGEPs	29	50	58%	40	51	78%
Private Subsidized Colleges	n/a	n/a	n/a	8	21	38%
Total	39	65	60%	66	90	73%

Resp. = Responding institutions; Pop. = all institutions in roster

Table 1.1 Type of institution response: Québec

An additional 11 Francophone responses were received from institutions across the country.

The responses from the Québec universities to many of the survey questions are more closely aligned with the response from universities located outside of Québec, than with the CEGEPs and private subsidized colleges. Furthermore, the responses from the CEGEPs and private subsidized colleges are less comparable with the colleges outside of Québec. This was the first year that the private subsidized colleges were included in the survey and their participation rate was particularly low (8/21).

DISTANCE EDUCATION

A total of 83% of the responding institutions reported that they offer distance education courses for credit. This was the same percentage as in 2017, when 83% answered 'yes'. Nearly all responding institutions with more than 7,500 enrolments (94%) offered distance education courses for credit. See Figure 1.

Small institutions (fewer than 1,000 students) and CÉGEPs and private subsidized colleges in Québec, were least likely to offer distance education courses. Of the 32 institutions that reported that they did not:

- 20 (63%) were CÉGEPs or private subsidized colleges in Québec,
- 6 (19%) were colleges outside Québec, and
- 6 (19%) were universities.

The great majority of Canadian institutions offering distance education courses and programs are using the Internet as the main delivery technology, but this is often supplemented with other technologies, especially conferencing and print. Of those institutions offering distance education courses, 84% used the Internet.

DOES YOUR INSTITUTION CURRENTLY OFFER ANY DISTANCE EDUCATION COURSES FOR CREDIT?

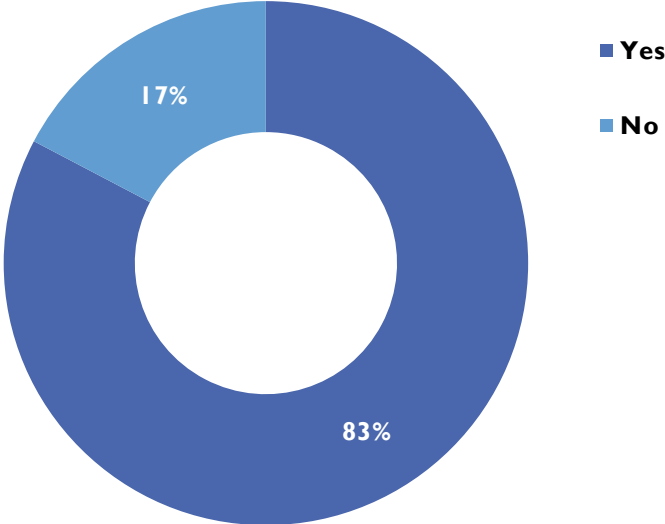


Chart 1.0 Offer Distance education courses: National response

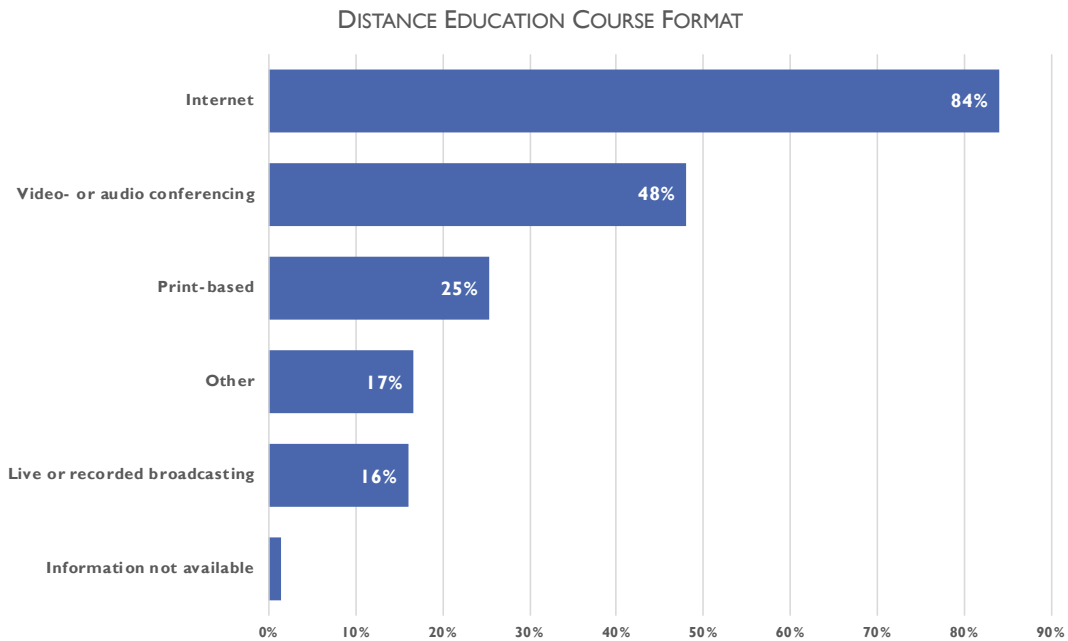


Chart 1.1. Distance education course format: National

When the types of institutions are combined, the results show that nearly two thirds of the institutions in Québec (63%) offer distance education courses for credit. This rate is higher for the Québec universities where 78% indicate they offer distance education courses for credit. The response was lower for the private subsidized colleges (57%) and CEGEPs (58%) in Québec.

Results from Québec institutions are lower than the national average where 83% of responding institutions offer distance education courses for credit. In Québec, 41 of the 65 (63%) institutions that responded to this question indicated they offer distance education courses for credit. See Chart 1.2 below.

DOES YOUR INSTITUTION CURRENTLY OFFER ANY DISTANCE EDUCATION COURSES FOR CREDIT?

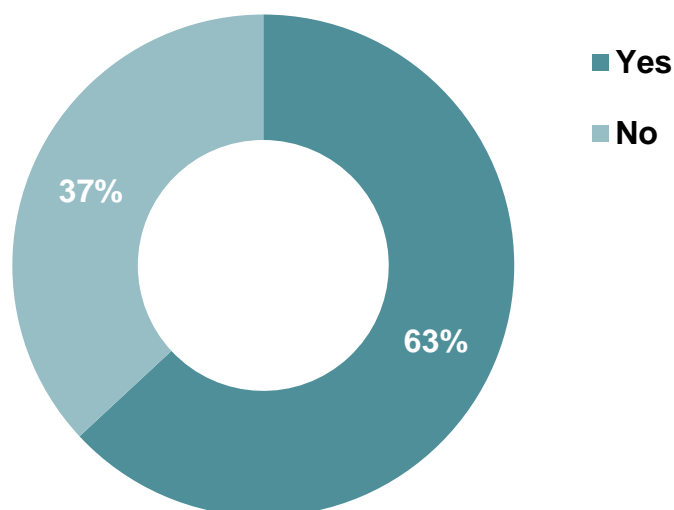


Chart 1.2. Distance education courses: **Québec**

Technologies employed in distance education courses

Although the Internet is clearly the main technology used for distance education, this is a lower proportion than in the 2017 survey, where all but two of the institutions offering distance education used the Internet as their primary delivery format. This difference between the two years could be due to the number of small institutions added to the roster in 2018, since institutions with fewer than 1,000 students were less likely to use the Internet for distance delivery.

The use of conferencing was up slightly from 2017, with 48% in 2018 compared to 44% in 2017. Print is still being used for distance education courses in about a quarter of the responding institutions, similar to 2017. TV or radio is used in a minority of institutions (16%). CÉGEPs and the private subsidized colleges in Québec were the highest users (around 25% of institutions).

Responses from Québec institutions for use of video-or audio-conferencing (50%) aligned with the national figure of 48%. The result of 70% for use of the Internet in distance education courses is lower than the national average of 84%.

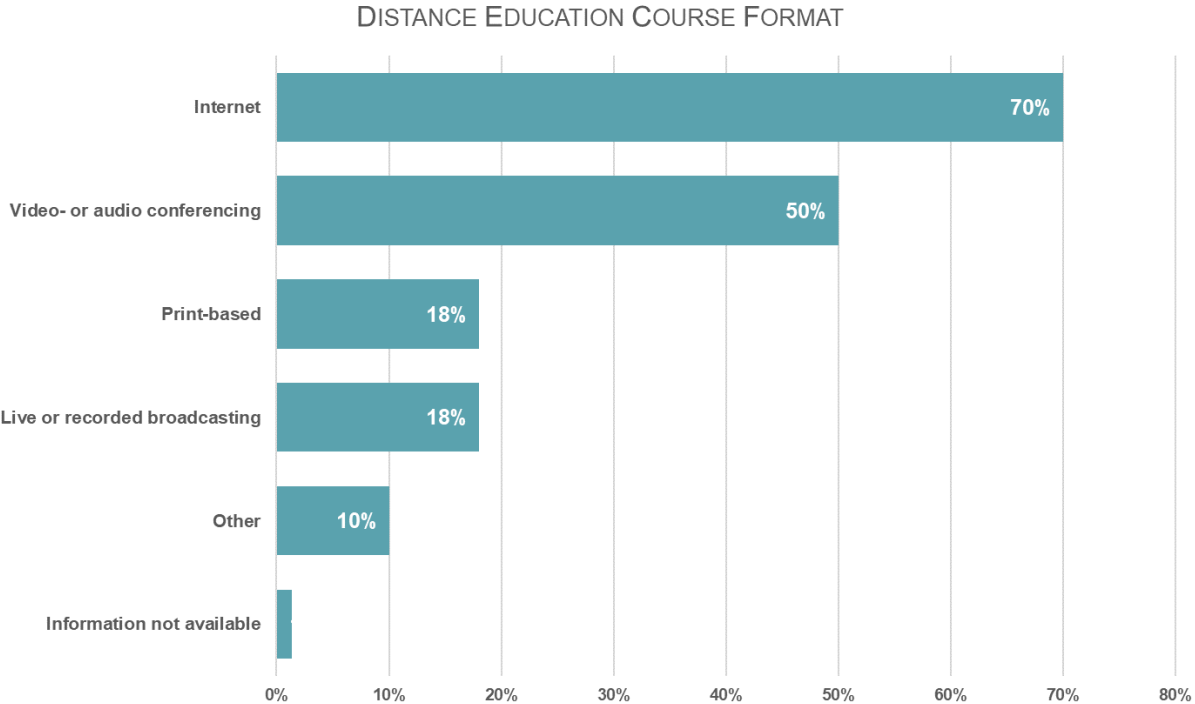


Chart 1.3 Distance Education Format: Québec

ONLINE LEARNING

*More than three-quarters (82%) of all responding universities and colleges offered online courses for credit in the fall of 2016. The response was lower for **Québec universities and colleges**, where collectively, 62% identified they have been offering online courses for credit. The proportion of institutions offering online courses for credit varies widely across the institution type.*

The proportion of institutions reporting that they offer online courses for credit was the same nationally in 2018 (82%) as was reported for 2017. Size of institution is very much a determining factor for online course offerings. Over half the institutions with fewer than 1,000 (52%) did not offer online courses, while almost every institution with more than 10,000 students did (only one did not).

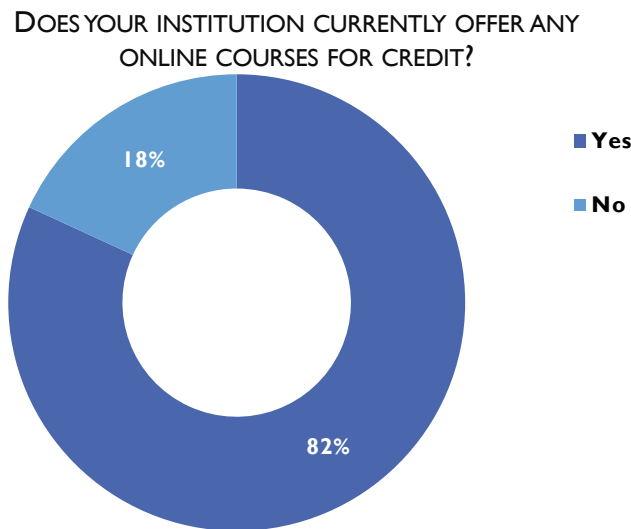


Chart 2.0. Distance Education Format: National

The response from Québec institutions further reflects the nature of their post-secondary system, where a number of institutions have not historically focused on offering online learning courses.

Of the 61 institutions that responded to this question, 38 (62%) reported that they do offer online courses for credit, while 23 reported that they do not. See Chart 2.1 below.

DOES YOUR INSTITUTION CURRENTLY OFFER ANY ONLINE COURSES FOR CREDIT?

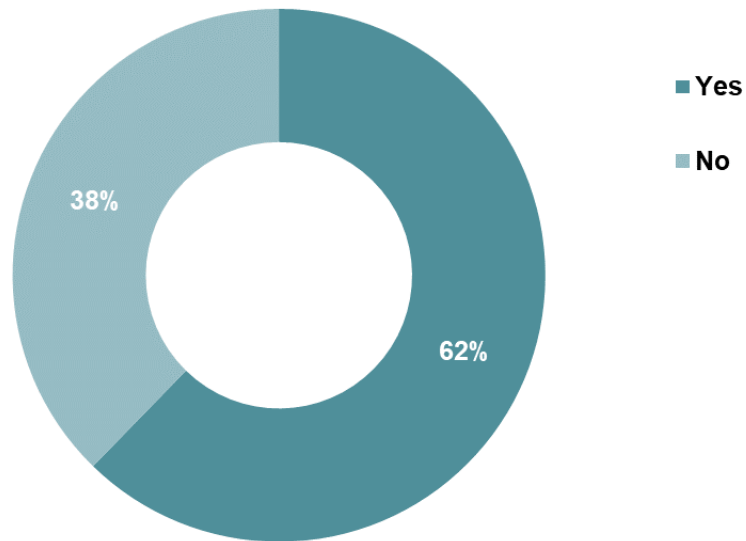


Chart 2.1. Online courses for credit: **Québec**

Nearly all (88%) of the universities in Québec offer online courses, while 93% of all universities across Canada offer online courses. The proportion is much lower for the CEGEPs (56%) and the private subsidized colleges (38%), than for colleges outside of Québec, where 91% indicate they offer online courses for credit.

All of the Francophone institutions outside of Québec and 93% of the Anglophone institutions reported they currently offer online courses for credit (100%), while nearly two-thirds (62%) of institutions within Québec offer online courses. Participation in online course offerings in the Francophone institutions outside of Québec may be influenced by the online activity at the main institution or others in their jurisdiction.

The following illustrates the differences between institutions in offering online courses.

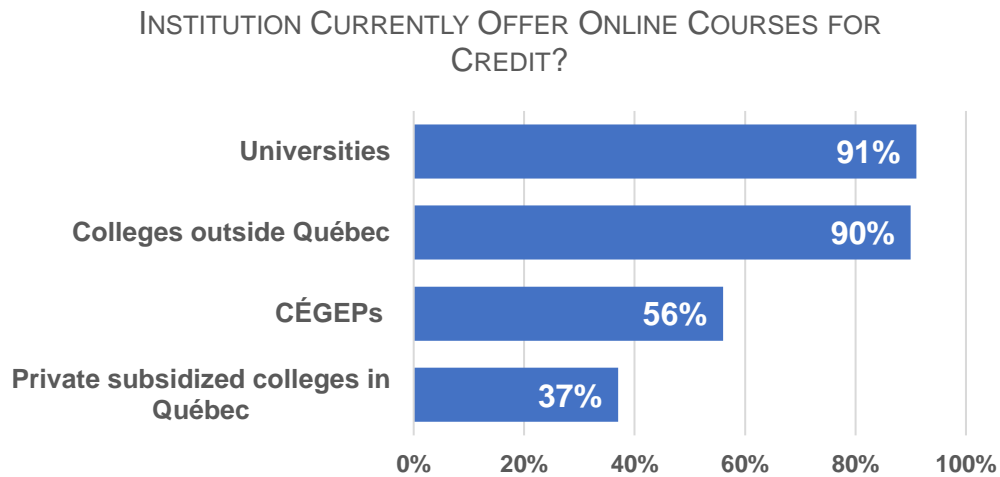


Chart 2.2 Online courses for credit: National

Respondents were asked if their institution offered online courses for credit in any of the years from 2008 to 2016. The results show a significant increase in institutions offering online courses after 2010 (from 68% in 2010 to 76% in 2011), and then a more gradual increase between 2011 and 2015 (from 76% in 2011 to 80% in 2015).

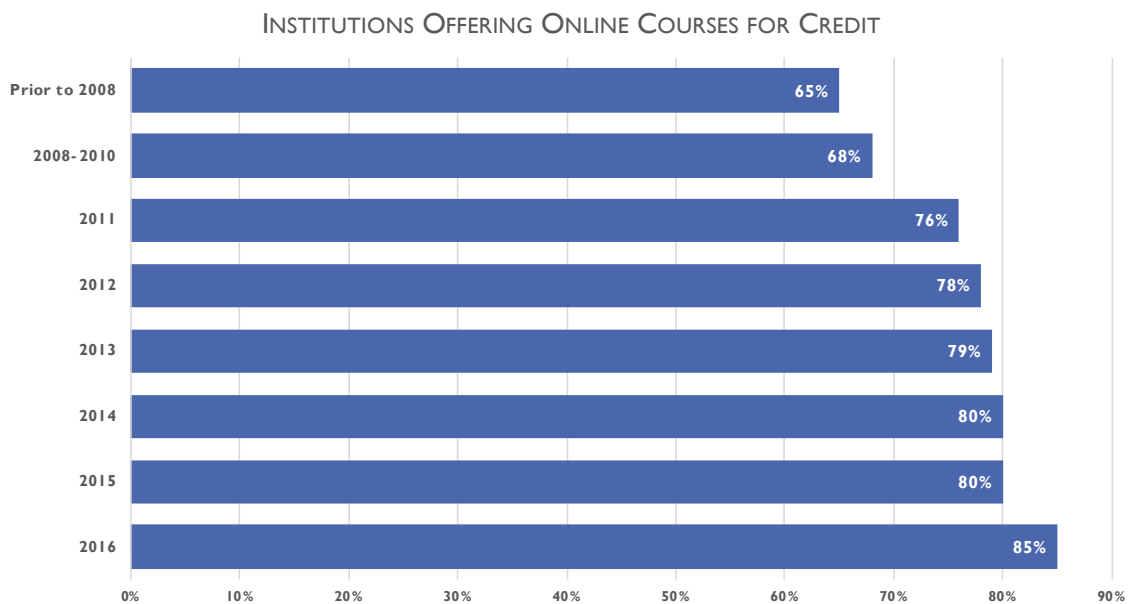


Chart 2.3. Institutions offering online courses for credit: National

Nationally, the main growth has come from the very small institutions. In 2008, only 14 responding institutions with fewer than 2,000 students were offering online programs, but by 2016 this had grown to 26, almost doubling in number. Canadian post-secondary education appears to be a relatively mature and growing market for online learning, with many institutions offering online courses for 15 years or more.

INSTITUTIONS OFFERING ONLINE COURSES FOR CREDIT

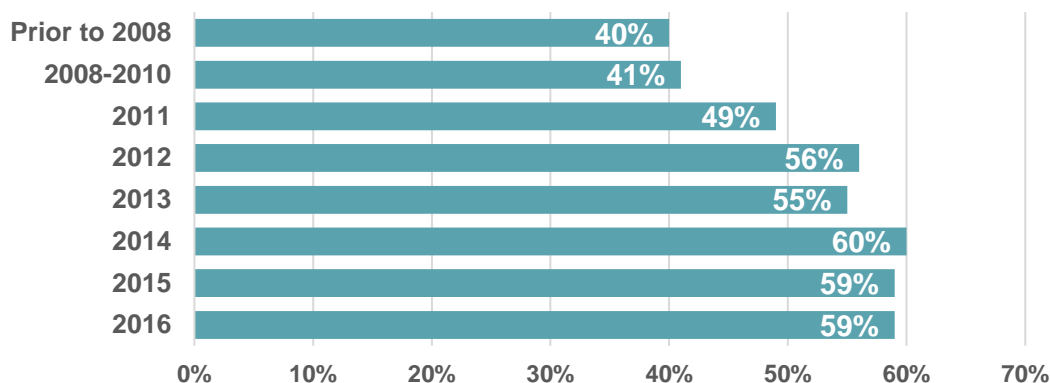


Chart 2.4. Institutions offering online courses for credit: **Québec**

The results from Québec institutions (French and English) indicate that the number of online course offerings for credit has been steadily increasing since 2011 yet remains much lower than the national average: 59% in 2016 compared to 85% Canada wide.

In Québec, the percentage of institutions offering online education has increased from 41% in 2008-2010 to 59% in 2016. The percentage is much higher for the Québec universities where those offering online courses increased from 63% in 2008-2010 to 88% in 2016, which is higher than the national average of 83%. Nearly all universities (93%) located outside of Québec were offering online courses in 2016.

The response from the Francophone institutions outside of Québec are closely aligned with the national average (83%), with 9 of 11 (82%) offering online courses in 2016.

ONLINE COURSE ENROLMENTS

The lack of consistent definitions and national reporting standards makes estimating the number of online course enrolments a daunting task. As noted in our 2017 report, obtaining accurate and reliable online student and course enrolment figures is a major challenge as many institutions do not track enrollments separately for online and distance, while others use different means of defining students and enrolments, making comparisons difficult.

We used a two-step process for 2018 to build reliable enrolment estimates. The first step was an outreach to all institutions on our roster asking them for feedback on the definitions to be used in the survey and what enrolment data they were best able to provide. The second step was to use the revised definitions to collect the enrolment numbers that institutions told us they could reliably report and use these results to build a set of national estimates.

Based on a careful analysis of the reported enrolment results we conclude that:

- For 2016-2017 17% of Canadian post-secondary students were taking at least one online course for credit; 18% in universities, and 19% in colleges outside Québec.
- Of all credit course enrolments, about 8% were fully online, representing 1.36 million online course registrations.
- The average course load for students taking online courses was between 3 to 4 online courses a year. Overall course loads ranged from 7-8 courses a year in universities to around 10 courses a year in colleges.
- 1.36 million online course registrations in terms of full-time equivalent students are equal to four universities each of 27,500 students, four colleges of 12,000 students and one Cégep of 3,500 students.

There are just over 2 million total students (2,072,368) enrolled across the 234 institutions on our roster, with the bulk of these (1,309,185 or 63% of the total) studying at a Canadian university. Our estimate of the total number of these students that took at least one online course is 354,302, or 17% of all enrolled students.

Two-thirds of the online students are at a university (236,917 or 67% of the online student base of 354,302), with most of the remaining at colleges outside of Québec.

NUMBER AND PERCENTAGE OF STUDENTS TAKING AT LEAST ONE ONLINE COURSE FOR ALL CANADIAN POST-SECONDARY INSTITUTIONS BY TYPE OF INSTITUTION

	Students taking at least one online course	All students	Percent of all students
Universities	236,917	1,309,185	18%
Colleges outside Québec	110,447	566,691	19%
CÉGEPs	6,261	173,081	4%
Private subsidized colleges in Québec	677	23,411	3%
Total	354,302	2,072,368	17%

The 2,072,368 total students represent 17,953,599 total course registrations, with universities again responsible for the majority of these (10,261,104 or 57% of the total). Online courses represent 1,357,225 of the 17,953,599 total course registrations (8%). Online course enrollments at universities and colleges outside of Québec each represented 8% of their total course enrollments, with CÉGEPs and private subsidized colleges in Québec reporting much lower proportions of online course enrolments. **Only 2% of online course registrations are at a CÉGEP and 3% for private subsidized college in Québec. It is important to note that only 8 responses were received from the private subsidized colleges.**

Participation in online courses for credit varies significantly in the Québec post-secondary system. In Québec universities, 20% of students took at least one online course, and 10% of all university credit course enrolments were in online courses. In the CEGEPs, just 4% are offering online courses for credit which accounts for 2% of all CEGEP enrollments and in the private subsidized institutions, 3% of all enrollments are in online courses.

NUMBER AND PERCENTAGE OF ONLINE COURSE REGISTRATIONS FOR ALL CANADIAN POST-SECONDARY INSTITUTIONS BY TYPE OF INSTITUTION

	Online course registrations	All course registrations	Percent of all course registrations
Universities	839,673	10,261,104	8%
Colleges outside Québec	476,232	5,661,687	8%
CÉGEPs	34,364	1,798,790	2%
Private subsidized colleges in Québec	6,956	232,018	3%
Total	1,357,225	17,953,599	8%

The Yukon, Newfoundland and Alberta are the provinces with the highest proportion of online learning at 100% of responding institutions for each province and territory. **In Québec, 38 out of 61 institutions (62%) indicated they offer online courses for credit.** Ontario has the second highest proportion of online learning at 98%. The Arctic regions of Nunavut and the North West Territories appear to have almost no online learning, perhaps related to the lack of high-speed Internet in the far north.

A breakdown of students taking at least one online course in **Québec universities and CEGEPs** is presented below:

NUMBER AND PERCENTAGE OF STUDENTS TAKING AT LEAST ONE ONLINE COURSE FOR QUEBEC POST-SECONDARY INSTITUTIONS BY TYPE OF INSTITUTION

	Students taking at least one online course	Percent of online students	Avg. online course load	Online course registrations	Percentage of online enrolments	All course registrations	Average Course Load	Student nos.
Universities	63,557	20%	4.12	262,116	10%	2,749,143	8.61	319,362
Cegeps	6,261	4%	5.49	34,364	2%	1,798,790	10.38	173,331
Total	69,818	14%	4.25	296,480	7%	4,547,933	9.23	492,693

Estimation Method

The process that produced these numbers is worth examination in some detail, both to show the multiple checks that were built into the process and to highlight the problems inherent in trying to build reliable national results from incomplete data.²

The first step was to identify which institutions did not offer any online courses. This information is combined from:

- institutions that returned the questionnaire and reported that they did not have any online offerings, and
- a web search of non-responding institutions' web sites that did not list any online courses, supplemented by personal knowledge of institutions by members of the research team.

A total of 74 of the 234 institutions (or 32%) of our roster have no online enrolments. While institutions with no online enrolments represent almost one third of our roster, they tend to have lower overall student enrolments, and represent only 10% of all students in Canadian post-secondary institutions.

Next, a multi-step process was used to calculate the number of students taking at least one online course and the number of total online course registrations. A few guiding principles were used to direct this effort:

1. Whenever possible use information reported by the institution in the 2018 survey.
2. Where a specific 2018 survey data element was missing, then use other data reported by the institution (e.g. use data for fall 2017 to estimate the 2016-2017 value).
3. Where no 2018 data exists, use data reported in the 2017 survey.
4. And finally, where there was no 2017 or 2018 data, provide an estimate using information from institutions that are most similar (e.g. type, province, and size).

One way to measure the proportion of teaching that is online is to calculate the total number of student online course registrations as a proportion of all course registrations (online and on campus). Institutions were asked the total number of student course registrations for their online courses and for all of their courses (online and on campus). This data was asked of both the most recent Fall term (Fall of 2017) and for the previous full academic year (2016-2017).

Not all institutions were able to provide all the data requested. In total, 132 institutions (82% of all institutions known to be offering online courses) provided data on online course registrations for the full year 2016-2017. A somewhat smaller number, 127, provided fall 2017 online course registrations.

² The data collection and estimate process is fully detailed in the accompanying technical report, the following is a brief overview to allow the reader to better understand the reported results.

Using data from the institutions that provided both online and total course registrations allows the proportion of students studying online in terms of course registrations, to be calculated. These figures suggest that approximately 9%-10% of all courses in Canadian post-secondary education are fully online.

Institutions were also asked to provide data on the number of individual students who took at least one online course for credit (based on individual student records) for Fall 2017 as an optional question. Just over half (52%) of the institutions with online courses provided the number of students taking at least one online course.

Using data from only those institutions that reported the number of unique online students shows that there is a minimum of 255,473 students in 83 Canadian post-secondary institutions taking at least one online course (12% of the total student population). There are a further 89 institutions that offer online courses that did not respond to this question.

Under the assumption that students in similar institutions will take a similar course load, it is possible to estimate the number of students taking at least one online course by dividing the number of online course registrations by the average online course load for that type of institution. This estimate increases the number of students taking at least one course online from 255,473 to 354,302. This constitutes 17% of the total number of post-secondary students in Canada (2,072,368).

A small number of institutions with online offerings (18%) did not provide online course enrolment data. To estimate their likely online course enrolments, calculations were made by identifying course loads. In this case, the ratio of online registrations to all course registrations was calculated for those institutions where data was available, segmented by province and type of institution, and used to estimate the missing data for similar institutions.

EXPECTATIONS FOR ONLINE ENROLMENTS

Institutions with online offerings were asked to compare their current enrolment level to that of the previous year, and to predict what change, if any, they would expect in those levels for the next year. These results indicate a steady growth in online enrolments, with almost two thirds of institutions reporting a growth in online enrolments from 2015-2016 to 2016-2017 with less than a quarter reporting a decline. Just over a third reported modest growth (up between 1-10%) and almost a third reported fast growth (more than 10% from last year).

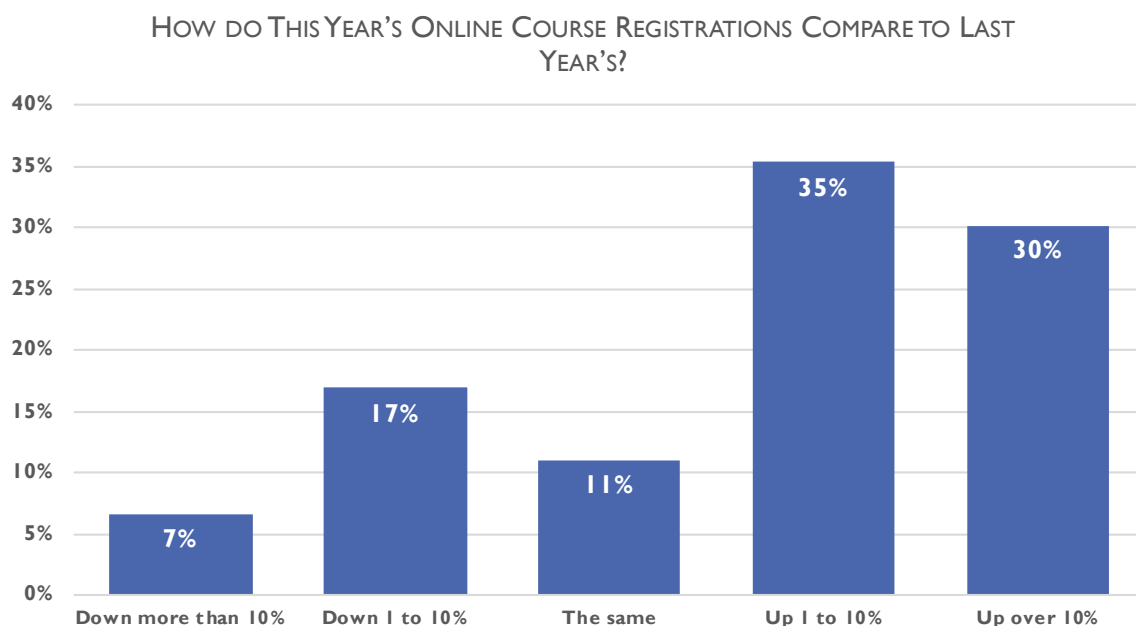


Chart 3.0. Online Registrations comparison last year: National

In British Columbia, eight out of 19 institutions reported a decline in online enrolments in 2017 (although another seven reported an increase). In Ontario, 79% of institutions reported an increase; and 75% of Alberta institutions reported an increase of between 1 and more than 10%.

In **Québec** and Saskatchewan, a majority of the institutions also reported increases in enrolments from the previous year.

HOW DO THIS YEAR'S ONLINE COURSE REGISTRATIONS COMPARE TO LAST YEAR'S?

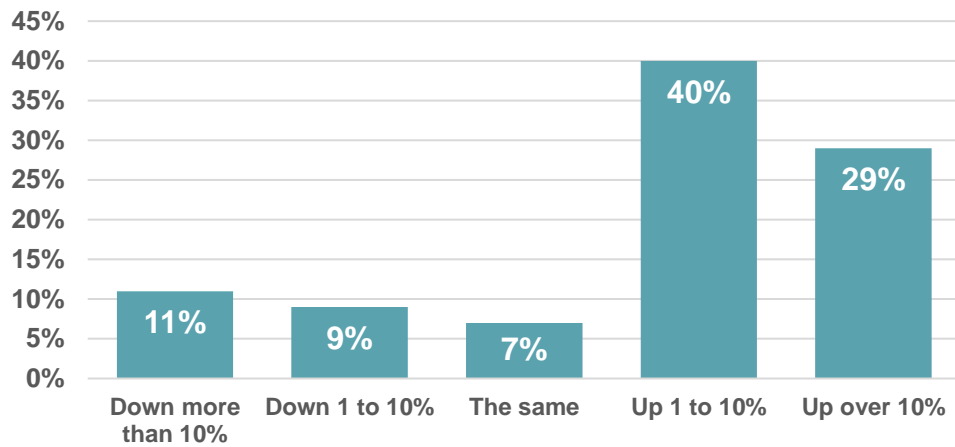


Chart 3.1. Online course registration comparison: **Québec**

The expectations of the change in online enrolments for next year were even higher, with three-quarters reporting likely growth and only 3% expecting a decline in enrolments. Most of the institutions in a majority of provinces expected online enrolments to increase, while in British Columbia four institutions anticipated a decline in online enrolments, the only province where this occurred.

HOW DO YOU EXPECT NEXT YEAR'S ONLINE COURSE REGISTRATIONS TO COMPARE TO THIS YEAR'S?

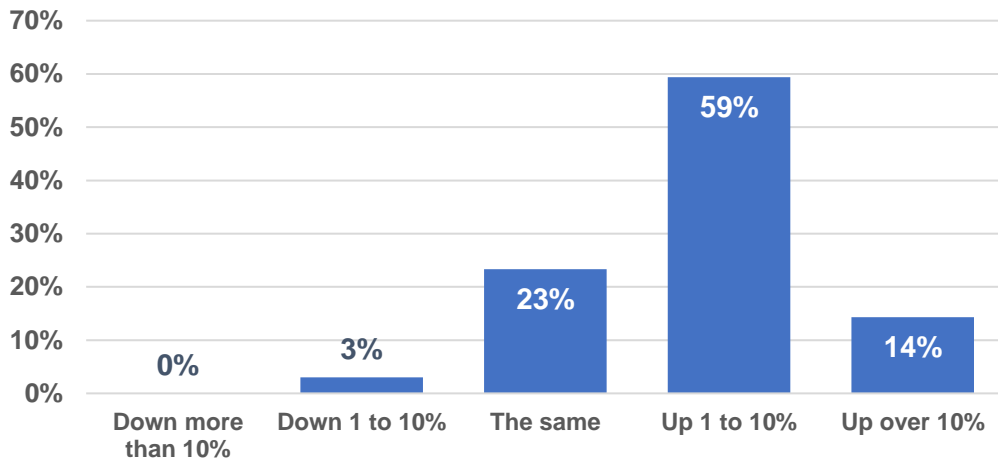


Chart 3.2. Online course registration forecast: National

The smallest institutions (those with fewer than 1,000 students) in general reported lower enrolments in 2016 than the previous year, but were more optimistic about an increase in online enrolments next year. Overall, francophone institutions were slightly more optimistic than anglophone institutions about increased enrolments next year, 76% compared to 68%.

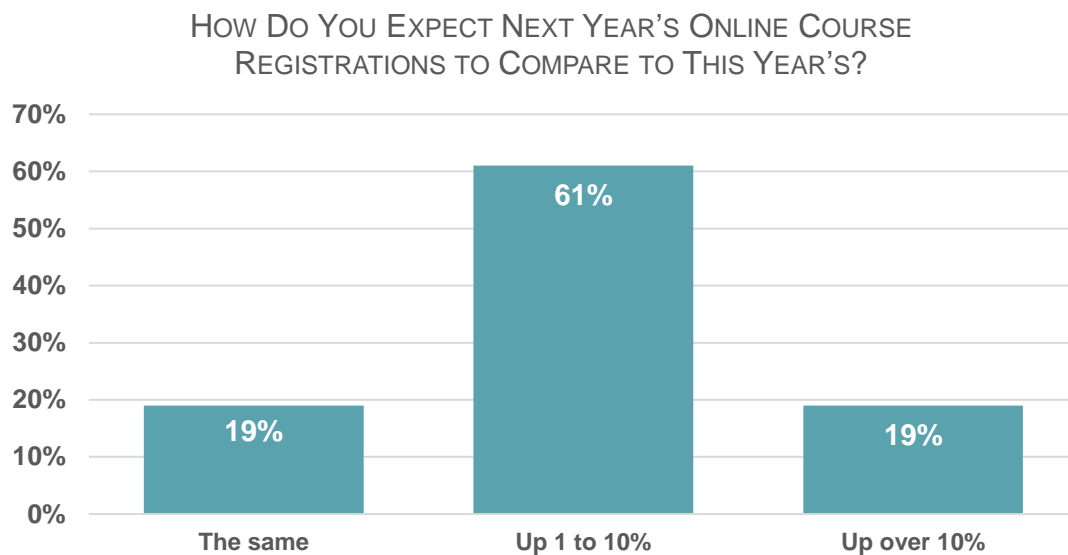


Chart 3.3. Online course registration forecast: Québec

The majority of institutions in Québec (80%) forecast increases in their online course registrations for the upcoming year. As can be seen in Chart 3.3, 61% of institutions forecast an increase of between 1% and 10% and 19% forecast increases of more than 10% for the coming year. The CEGEPs were more likely to forecast an increase (89%), while Québec universities and universities located outside of Québec forecast 73% and 78% respectively.

Nearly all of the CEGEPs (89%) forecast an increase in registrations for the coming year of between 1% and more than 10% and 73% of Québec universities reported an increase in their online course registrations. Just 3 private subsidized institutions in Québec responded to this question and one indicated they anticipate their online course registrations to stay the same and the other two responses forecast an increase.

A total of 9 Francophone institutions outside of Québec responded to this question and 8 of 9 (89%) forecast an increase of between 1%-10% and one institution expected an increase of over 10% for the next year.

BLENDING AND HYBRID LEARNING

Blended/Hybrid courses are designed to combine both online and face-to-face teaching (in any combination). The same definition was used in 2018 as in 2017, counting courses where some, but not all, of the face-to-face teaching has been replaced by online study.

The 2018 responses indicate that all types of institutions are experimenting with blended/hybrid learning in ways that suit the content, student, instructor, geography, discipline, pedagogy and more. In essence, institutions are adapting and adopting the affordance of the technologies available on campus to support a blend of online, face-to-face and learning at a distance.

- Approximately one in five institutions have significant activity in blended/hybrid course offerings
- Over 80% of universities and colleges outside of Québec have integrated blended/hybrid technologies in their offerings
- Between 43-58% of CEGEPs and private subsidized colleges in Québec report some use of blended/hybrid activity
- A number of institutions are using quality assurance models and support their faculty in preparing to teach in blended/hybrid courses.

In the 2017 report, we noted:

- Tracking blended/hybrid counts is difficult. Most institutions do not track classes with reduced face-to-face time, although some are beginning to.
- There are many institutions, but few courses. Almost three quarters of the responding institutions in 2017 reported that this type of teaching was occurring in their institution.
- However, three quarters of the institutions reported that fewer than 10% of their courses were in this format.
- Only a few institutions had a substantial number of courses in this format.

The 2018 results reinforce the conclusions from the 2017 report that more than three quarters of Canadian institutions are now integrating online with classroom teaching, but no more than one in five have a significant number of courses in this format. In other words, blended/hybrid learning is wide but not deep.

The response from Québec institutions mirrors that of the rest of the country with 50% indicating they offer up to 10% of their courses as blended/hybrid courses compared to 56% across the country.

PROPORTION OF COURSES TAUGHT AS BLENDED/HYBRID

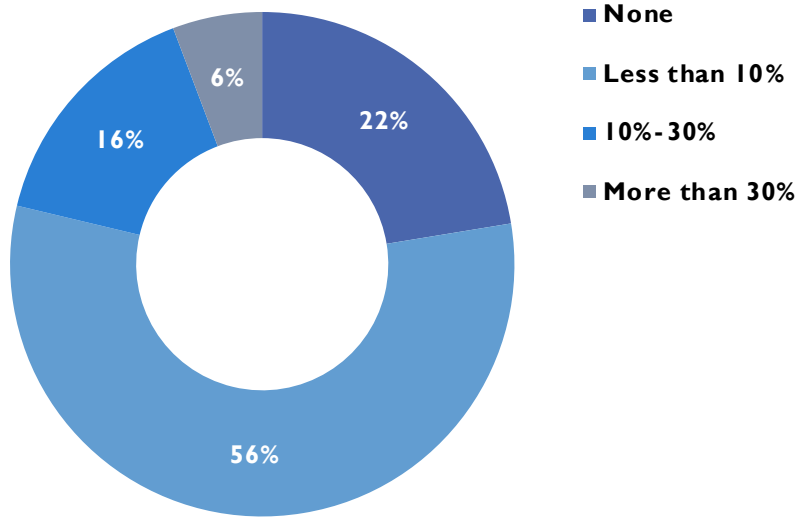
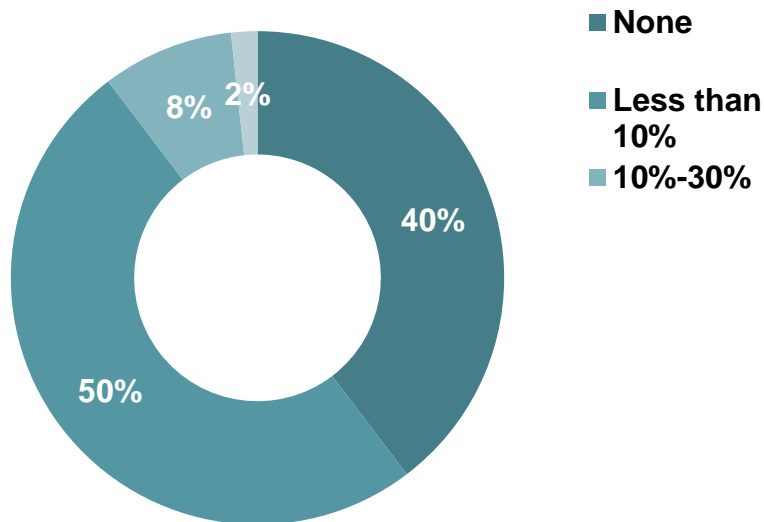


Chart 4.0. Proportion of blended/hybrid courses: National

The proportion of courses in blended/hybrid overall is slightly lower than the national average of 56%; and a higher proportion of Québec institutions are intending to offer courses in this format, 24% compared to 10% nationally.

PROPORTION OF COURSES TAUGHT AS BLENDED/HYBRID



Nearly three-quarters (73%) of Québec universities offer blended/hybrid courses, and 89% of universities located outside of Québec offer blended/hybrid courses.

Chart 4.1. Proportion of blended/hybrid courses: Québec

The proportion of responding institutions in Québec that do not offer blended/hybrid courses was 40% compared to 22% across the country.

There is considerable variation in the level of adoption of blended/hybrid learning by type of institution. The overall rate of 78% across all institutions is composed of higher rates at universities and colleges outside Québec, and lower rates for CÉGEPs and private subsidized colleges in Québec.

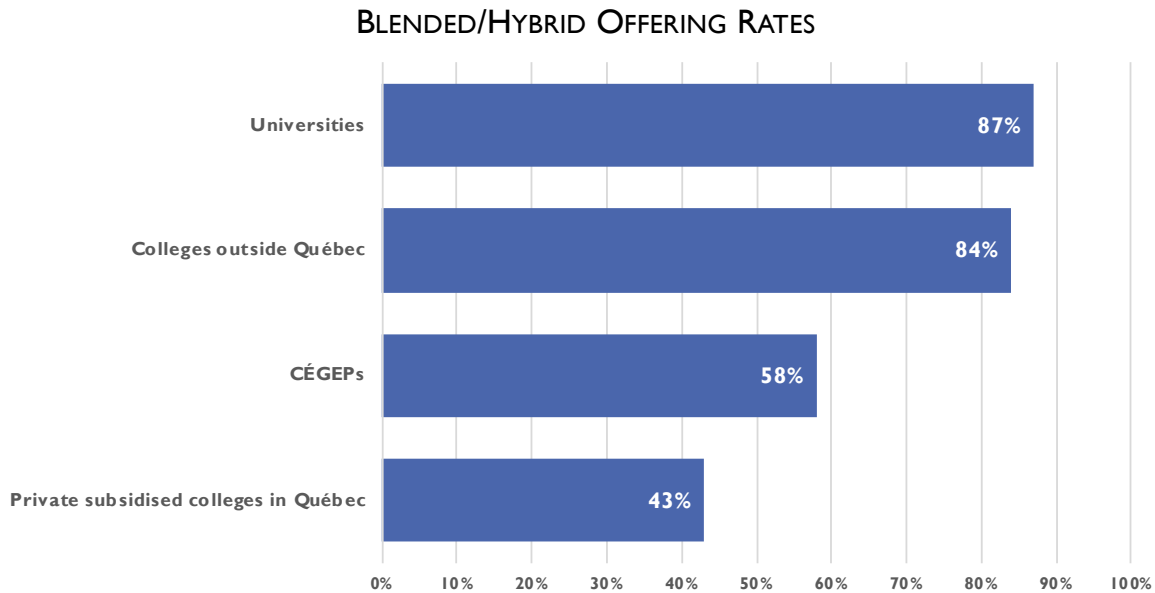


Chart 4.2. Blended/hybrid offering rates: National – FIX P. Subsidized

DEFINITIONS

A critical finding from the 2017 report was the level of disagreement on definitions of the terms used to describe courses that are offered as 'distance education', 'online' or 'blended/hybrid'. Clearly, it is difficult to collect data, conduct research, create effective policies, or have meaningful comparison if the terms used differ in meaning depending on each institution's or department's interpretation.

Because of this issue, the 2018 data collection approach was modified to include a pre-survey to get feedback on the ability of institutions to map their internal definitions to those we could use in the survey, and included a refinement of the survey definitions to more broadly capture the variety of activities that may be labeled in another way locally, but do not differ in how the course is conducted.

As a further test of the reliability of the questionnaire definitions, institutions were specifically asked to compare their internal definitions of distance education, online courses, and blended/hybrid courses to those presented in the survey. Institutions were then requested to share their definition if it didn't match the one provided.

For each of the definitions provided: distance education, online and blended/hybrid, a majority of institutions indicated that their institution definitions match. That is a positive sign as institutions across the provinces tend to be classifying the activities in much the same, or at least a comparable way. However, that still leaves disagreement in the terms by a significant minority, showing the need for more work to foster further agreement.

Defining Distance Education

Institutions were asked if their internal definition for a distance education course matched the one presented in the survey, where they were presented with the following definition:

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

Slightly more than half (54%) of the respondents found that the survey definition matched their institutional definition. Just under a quarter of responding institutions (22%) indicated they have no definition of a distance education course. A small group (12% of responders) reported that they have more than one definition at their institution, which could be an issue especially for larger institutions. An additional 12% reported that the survey and institutional definitions do not match.

DOES THE INSTITUTION'S DISTANCE EDUCATION DEFINITION MATCH THE ONE IN THE SURVEY

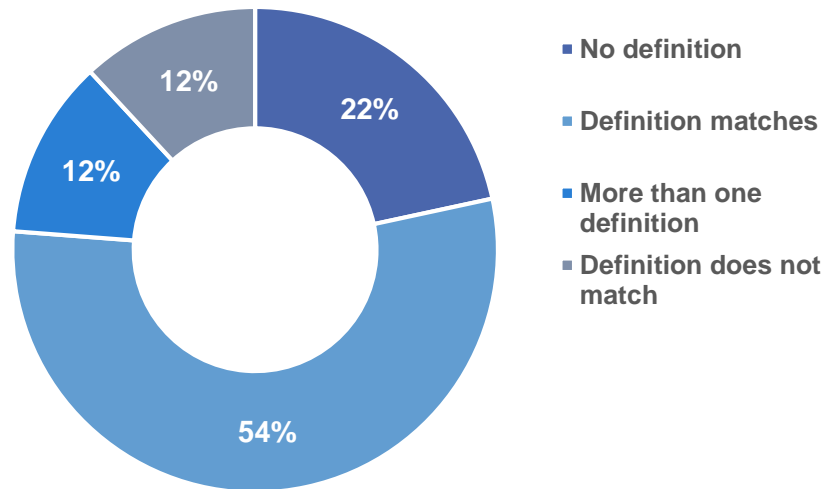


Chart 4.3. Distance education definition match: National

The results show that just under half (45%) of Québec institutions have an institution definition of distance education that matches the survey definition and nearly one-third, (29%) do not have a definition.

DOES THE INSTITUTION'S DISTANCE EDUCATION DEFINITION MATCH THE ONE IN THE SURVEY

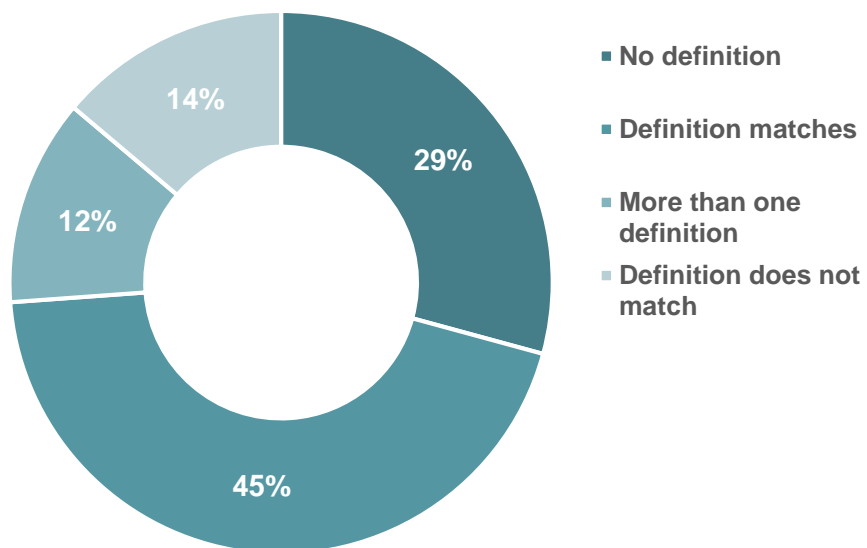


Chart 4.4. Distance Education Definition Match: Québec

The level of agreement with the survey definition varies by institution type. The responses from Québec universities indicate a 59% match to the survey definition of *distance education*. The lowest rate for the definition matching was among the CEGEPs at just 43%. Given that several of the CEGEPs and the private subsidized institution are just beginning to offer online courses, they may be catching up with the other institutional sectors on adopting a definition.

The level of agreement was much higher for the Francophone institutions outside of Québec, where 82% of the responses reported that their definition matched that provided by the survey.

Institutions with a different definition than the survey definition were asked to provide their definition(s) or to explain their answer. Many institutions provided detailed descriptions of exactly what is offered by the institution. For the most part, the open-ended responses were essentially a subset of the distance education definition provided in the survey.

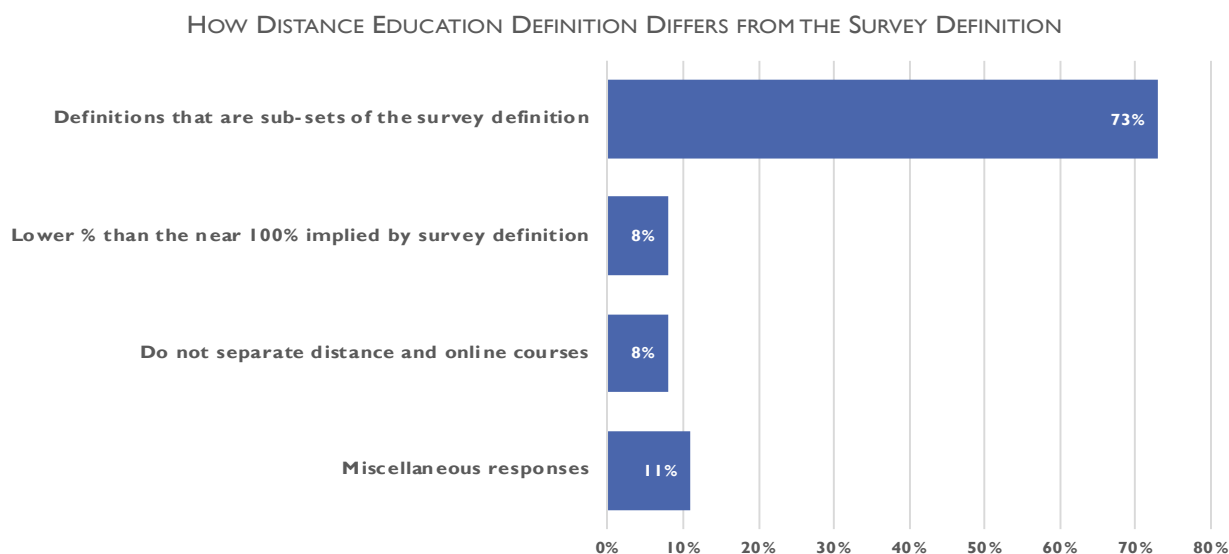


Chart 4.5. Distance Education Definition Differences: National

Whereas the survey definition focuses on what activity is taking place, the text submitted often did not substantially differ in concept. Instead, it provided more details on how distance education is provided, such as listing different modalities. Taking that view, an additional 10-15% of the respondents were generally in agreement with the survey definition.

Defining Online Learning

Institutions were asked if their internal definition for an online course matched the one provided in the questionnaire:

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.

Nearly two-thirds of the responding institutions (65%) used the same definition as the one provided. A further 6% used more than one definition, 19% had no definition and 10% had a different definition from the one provided.

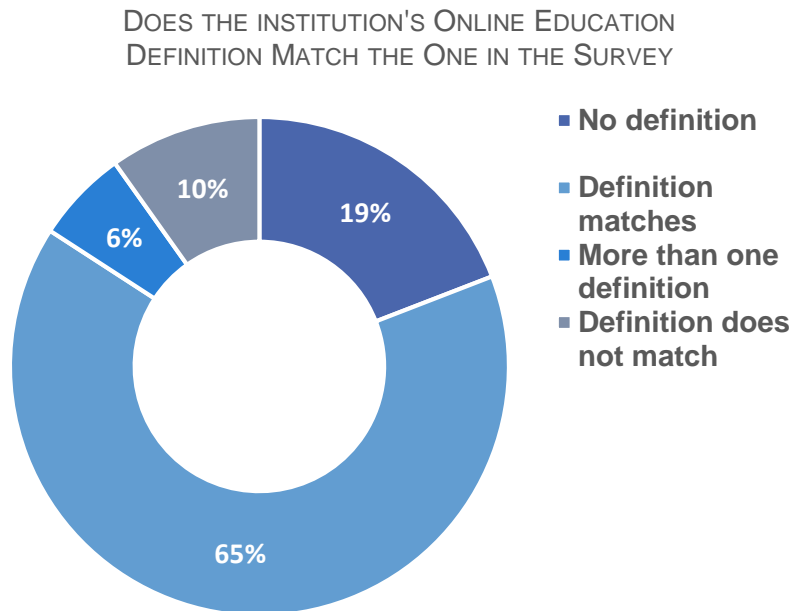


Chart 4.6. Definition of online education match: National

There was a greater level of agreement with this definition than with the one provided for distance education. Among institutions with online course offerings, agreement was even higher

at 70%. Colleges have a remarkably high level of agreement (80%), while fewer than half (45%) of CEGEPs have a definition that matches.

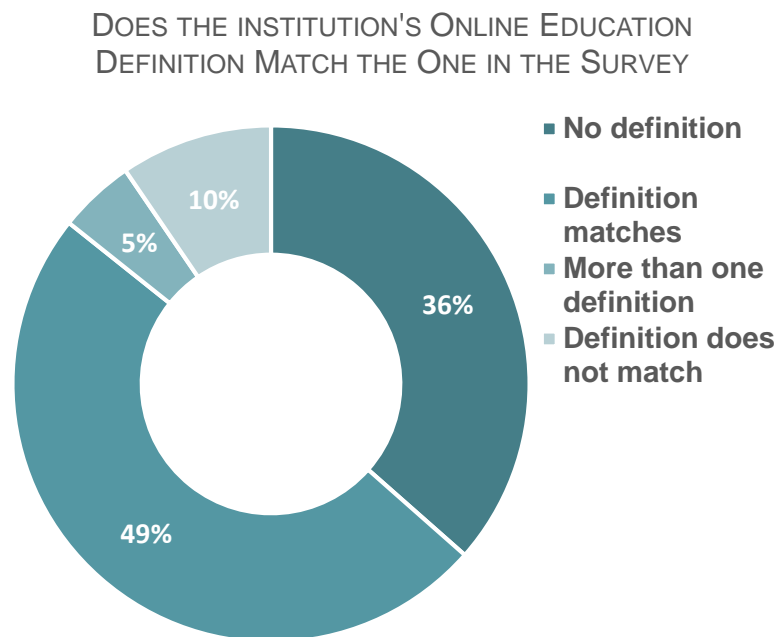


Chart 4.7. Definition of online education match: **Québec**

Nearly half (49%) of all Québec institutions have a definition for online learning that matches the survey definition and just over one-third (36%) of Québec institutions do not have a definition for online learning.

Two-thirds (66%) of universities located outside of Québec reported a match to the survey definition of an *online course*, while a slightly lower proportion (59%) of Québec universities agreed that their definition of an online course matched the one provided by the survey.

The CEGEPs and private subsidized colleges in Québec were least likely to identify a match with the survey definition (40% and 38% respectively).

Taken collectively, more institutions in Québec did not have a definition for an online course than the rest of Canada, with 37% reporting they do not have a definition. The low level of agreement may be related to translation or language issue and is an area that will be explored further. The results were similar in Alberta, where 35% of responding institutions reporting they do not have a definition.

Nearly all of the institutions that provided a French language survey response from outside of Québec offer online courses for credit and had a much higher match to the survey definition of an *online course* (91%).

Almost one-in-five institutions (19%) have no definition of an online education course with this percentage being much higher for CEGEPs and the private subsidized colleges. As mentioned previously, CEGEPs are just beginning to offer or are greatly expanding their online offerings. Meanwhile, colleges outside of Québec have a very high (79%) match rate on this definition. Relatively few (6%) of institutions reported having more than one definition for an online course.

The survey provided the opportunity for respondents to provide their definition(s) or to explain their answer. Whereas the survey definition focuses on what activity is taking place, similar to the results for the distance education definition, the text submitted typically did not substantially differ in concept. Instead, it provided more details on how online education is provided, such as listing different modalities.

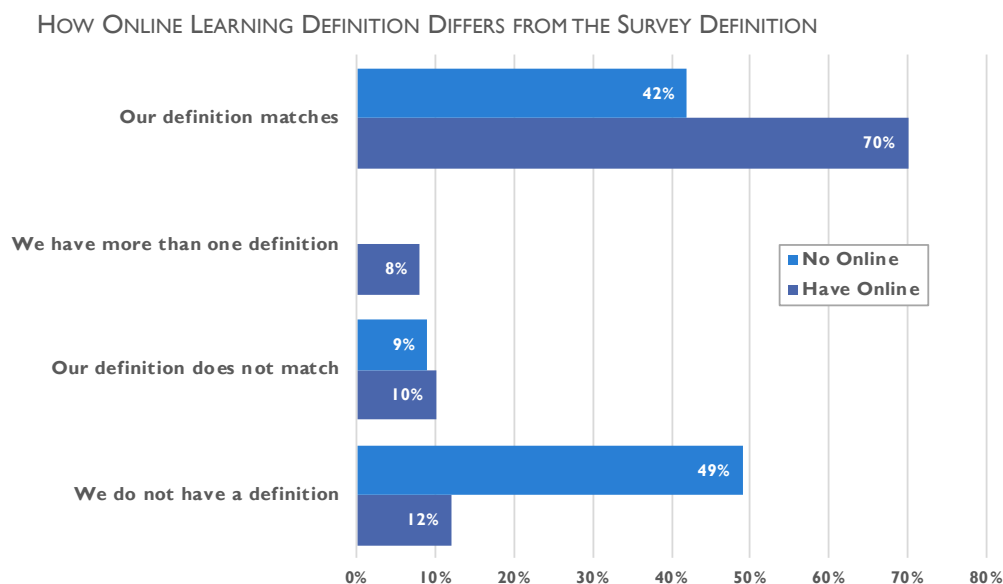
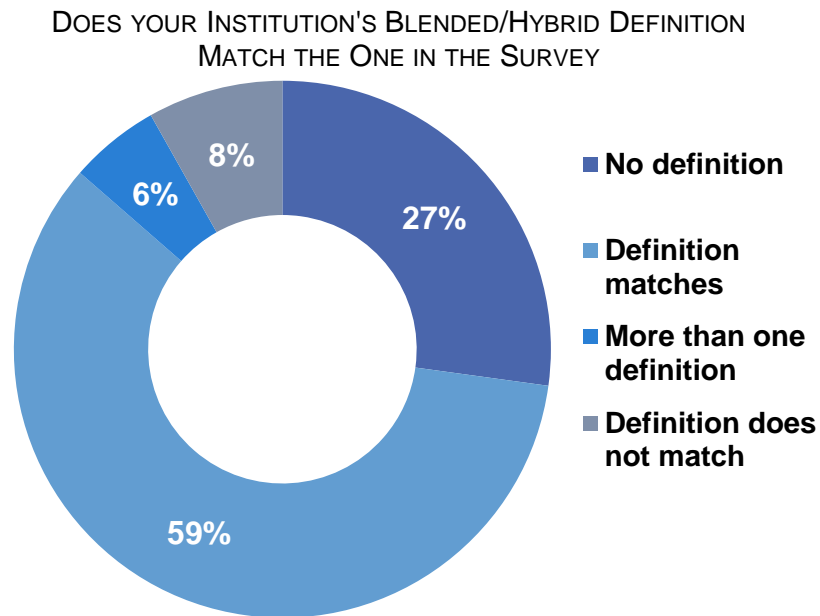


Chart 4.8. Definition of online education differences: National

Defining Blended/hybrid Learning

The term blended/hybrid has been around for a very long time, yet there is still either confusion or disagreement on what is or is not included. The definition, as provided by the survey: *A blended/hybrid course is: 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.*

Chart 4.9. Definition of blended/hybrid education match: National



More respondents agreed (59%) with the blended/hybrid definition than was found with the distance definition, but not quite as many as found a match with the online definition. A quarter (25%) of all reporting institutions do not have a definition, which may be due to this variation of distance education being the most recent.

For CEGEPs, there are more respondents who say this definition matches the one they use than is found for either the distance or online definitions. This model may be a better match for the students they serve. The college sector again has the highest rate of agreement with the survey definition.

Open-ended comments on this definition show that there is a great variation among those not in agreement. The variance may be higher due to the fact that the survey had combined both blended and hybrid in defining this activity. Some use one term, some use the other, some use both interchangeably, and others use different terms.

For the distance and online definitions, comments often tended to be lists of specifics that actually were detailed subsets of the survey definition. This was less the case for blended/hybrid. A few institutions use the blended and/or hybrid terms to describe activities that do not reduce face-to-face instruction, such as “flipped” classrooms, where students are expected to view lectures outside face-to-face time and the in-class experience is more interactive. The others used the term for videoconference classes in which students are synchronously participating in a course via voice and video, but in different locations.

DOES YOUR INSTITUTION'S BLENDED/HYBRID DEFINITION MATCH THE ONE IN THE SURVEY

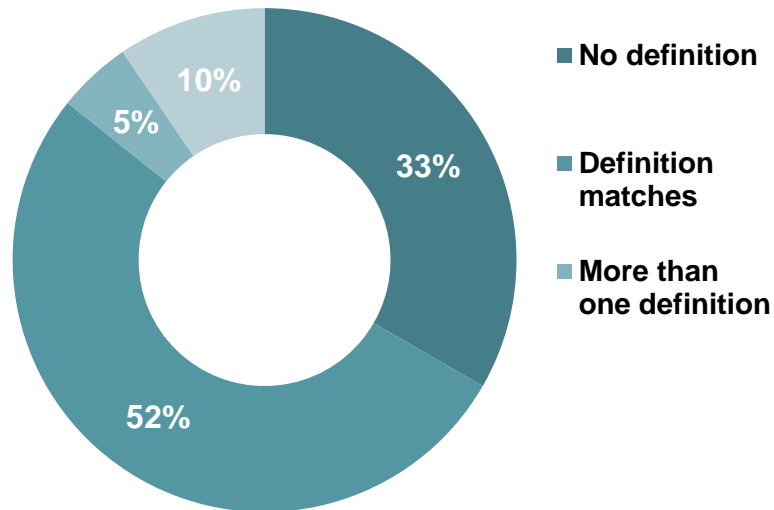


Chart 4.9.1. Definition of blended/hybrid education match: Québec

Just over half, (52%) of Québec institutions reported a match between their institution definition of blended/hybrid education and the survey definition. One-third of the institutions reported that they do not have a definition for blended/hybrid learning.

There was a much higher rate of agreement to the blended/hybrid definition in colleges located outside of Québec (70%) than in the CEGEPs (53%) and the private subsidized colleges (50%).

There was a much higher rate of agreement for *blended/hybrid courses*, in the Francophone institutions located outside of Québec (73%).

OPEN EDUCATIONAL RESOURCES

Open educational resources (OER) are freely accessible, openly licensed text, media, and other assets that are useful for teaching and learning. Several Canadian provincial governments are supporting the development and use of locally produced OER. Open textbooks, a specific form of open educational resources, are licensed under an open copyright license and made available online to be freely used by students, teachers and members of the public. Government agencies in British Columbia, Alberta, Saskatchewan, and Ontario currently have projects to support the use of open textbooks.

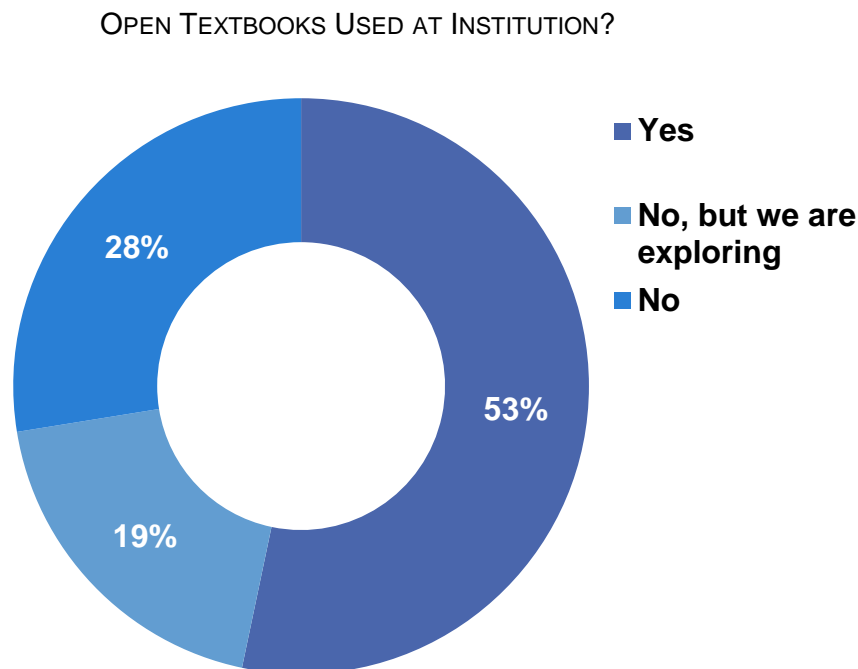


Chart 5.0. Open Textbooks: National

A substantial number of Canadian post-secondary institutions (just over half) are using open textbooks and a further fifth are exploring their use. Approximately 60% of universities use them, while colleges in Québec have a lower rate of utilization (just over a third of institutions). A further 19% of institutions are exploring their use, particularly in colleges outside Québec (27%).

The highest proportions of institutions using open textbooks were in British Columbia (90%), Alberta (78%) which reflects the impact of the BC Open Textbook project that has now been running for five years. In Nova Scotia, 63% of institutions indicated they are using open textbooks and **in Québec, just over one-third (35%) of responding institutions reported using open textbooks and 11% indicated they were exploring using open textbooks.**

Two of the Francophone institutions located outside of Québec reported using open

textbooks, 3 indicated they were exploring their use and 5 of the 10 that responded do not use open textbooks.

The provinces with the lowest reported use were New Brunswick (none), and Saskatchewan (33%). Smaller institutions were much less likely to use open textbooks than larger ones.

OPEN TEXTBOOKS USED AT INSTITUTION?

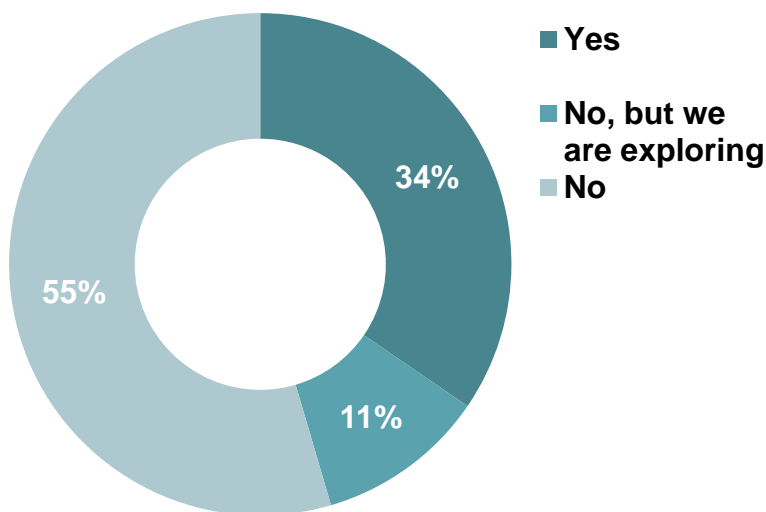


Chart 5.1. Open Educational Resources: Québec

A very small percentage (20%) of institutions using open educational resources report that they track cost savings. Only 5 out of 25 institutions responding to this question indicated they track cost savings.

TRACK SAVINGS FOR STUDENTS FROM SWITCHING FROM COMMERCIAL TO OPEN

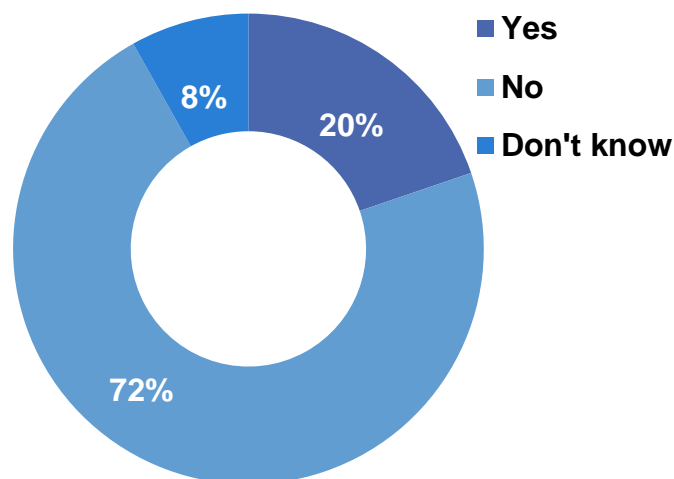


Chart 5.2. Track cost savings from adopting OER materials: National

Survey responses indicate that 19 of 55 institutions in Québec (35%) use open textbooks, which is much lower than the National average of 53%. Only a small number of universities in Québec indicated they use open textbooks with 5 of 16 responses (31%), while 70% of universities across Canada reported using open textbooks. Limited availability of French language open education resources and open textbooks may influence the adoption and use of open textbooks.

Québec institutions were also asked to indicate *where* they used open textbooks. Of the 19 institutions that responded to this question, 13 (69%) reported that open textbooks were used in face-to-face classes; 12 (63%) use them in online courses and 7 (37%) indicate that they use open textbooks in blended/hybrid classes.

None of the Québec institutions reported that they track cost savings as a result of using open textbooks.

Two of the 11 Francophone institutions outside of Québec responded to this question and one reported that it does track cost savings, and the other reported that it did not.

A number of institutions are offering different forms of training for instructors regarding the use of OER, but these still represent a relatively small. Some Ontario universities and colleges have emergent interest in OER/OEP, but most do not have training.

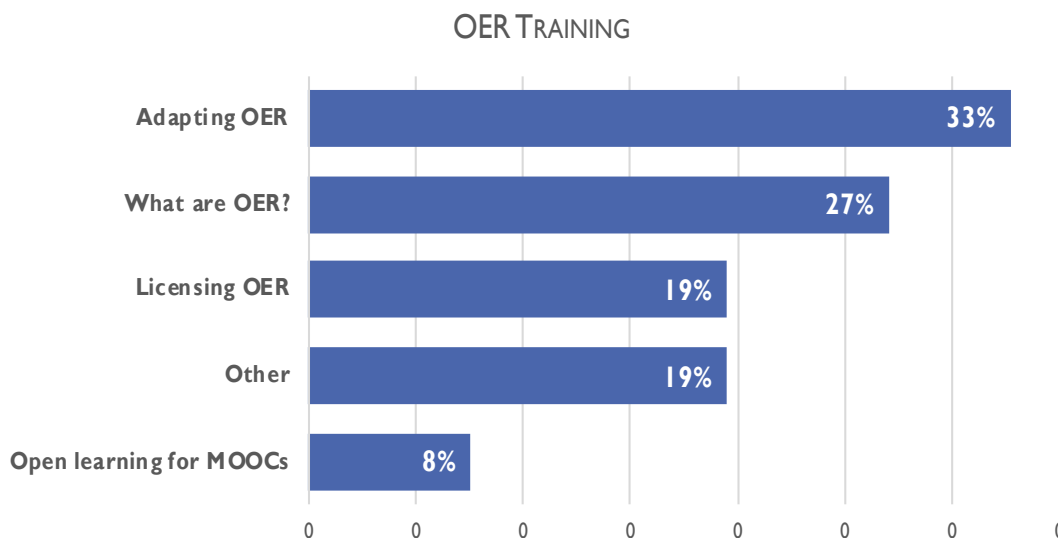


Chart 5.3. OER training: National

Only a small number of Québec institutions and Francophone institutions outside of Québec indicated they offer training for OER, the table below provides a breakdown of institution responses:

OER Training	# of Québec institutions	# of Francophone institutions outside Québec
What are OER?	1	2
Adapting OER for use in classrooms and online	4	2
Licensing OER	2	1
Open learning design for MOOCs and public participation courses	2	1

CONTINUING EDUCATION

Continuing education is offered by the vast majority of institutions in each sector and in every province and territory that responded. Continuing education courses were offered by 93% of the Anglophone institutions and by 92% of the Francophone institutions. A higher percentage of Colleges and CÉGEPs offer continuing education than universities, but all types of institutions offer continuing education courses.

OFFER CONTINUING EDUCATION COURSES

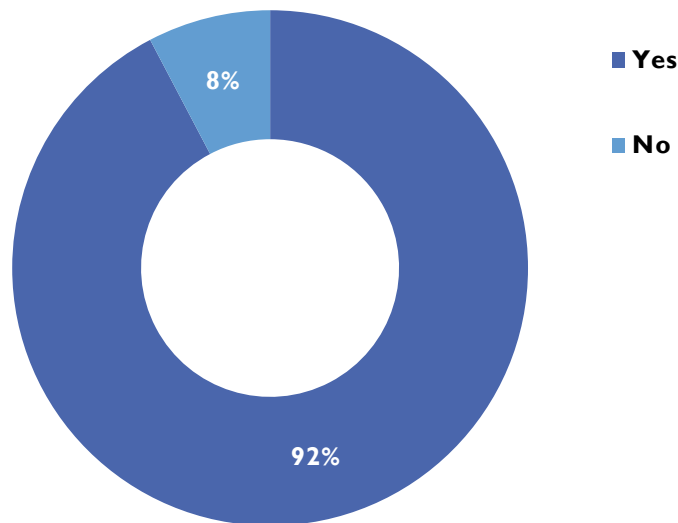


Chart 6.0. Continuing education courses: National

Continuing education is offered as both for-credit and not-for-credit, and institutions take advantage of face-to-face, online and blended/hybrid delivery methods. Face-to-face, not-for-credit courses were the most common offering of the responding institutions (87%). Less than half of the institutions use blended/hybrid delivery for their continuing education and the response for not-for-credit courses was higher for both face-to-face and online delivery. Not-for-credit courses were offered by slightly more institutions than for-credit courses, but the majority of responding institutions offer courses both for-credit and not-for-credit.

The response from Québec institutions on continuing education mirrors that of the rest of the country, with the overwhelming majority (94%) indicating their institution offer continuing education and 6% do not. The percentage of private subsidized colleges was much lower, with 5 of 8 (63%) reporting that they offer continuing education courses.

CONTINUING EDUCATION COURSES

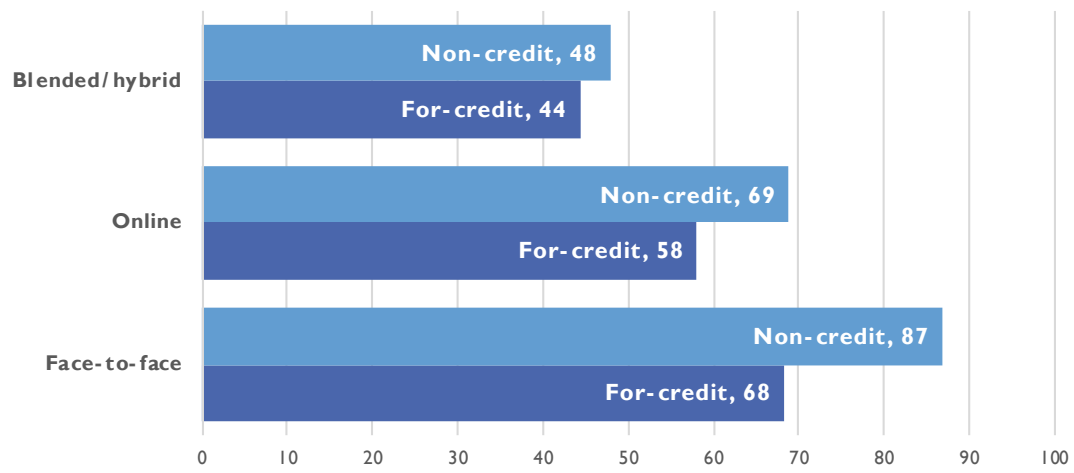


Chart 6.1. Continuing Education courses: National

TECHNOLOGIES

Learning Management Systems (LMS) continue to be the backbone technology used by institutions for their online and blended/hybrid courses. Nearly all institutions are combining various web-based video technologies to augment the LMS and support increased interaction and engagement in their courses. Many are increasing the use of video, lecture capture and video-conferencing and some are developing 360-degree photos and videos to support student engagement.

The 2018 survey included select technologies used in the 2017 survey (LMS, video streaming, social media) and expanded the choices to include emerging innovative technologies such as virtual and augmented reality, learning analytics/ artificial intelligence and simulations.

As in 2017, the responses indicate that nearly all of the responding institutions use the Internet for their online and blended/hybrid delivery. Of the institutions that responded to this question, (95%) indicated that they use a LMS extensively, an increase from 87% in 2017.

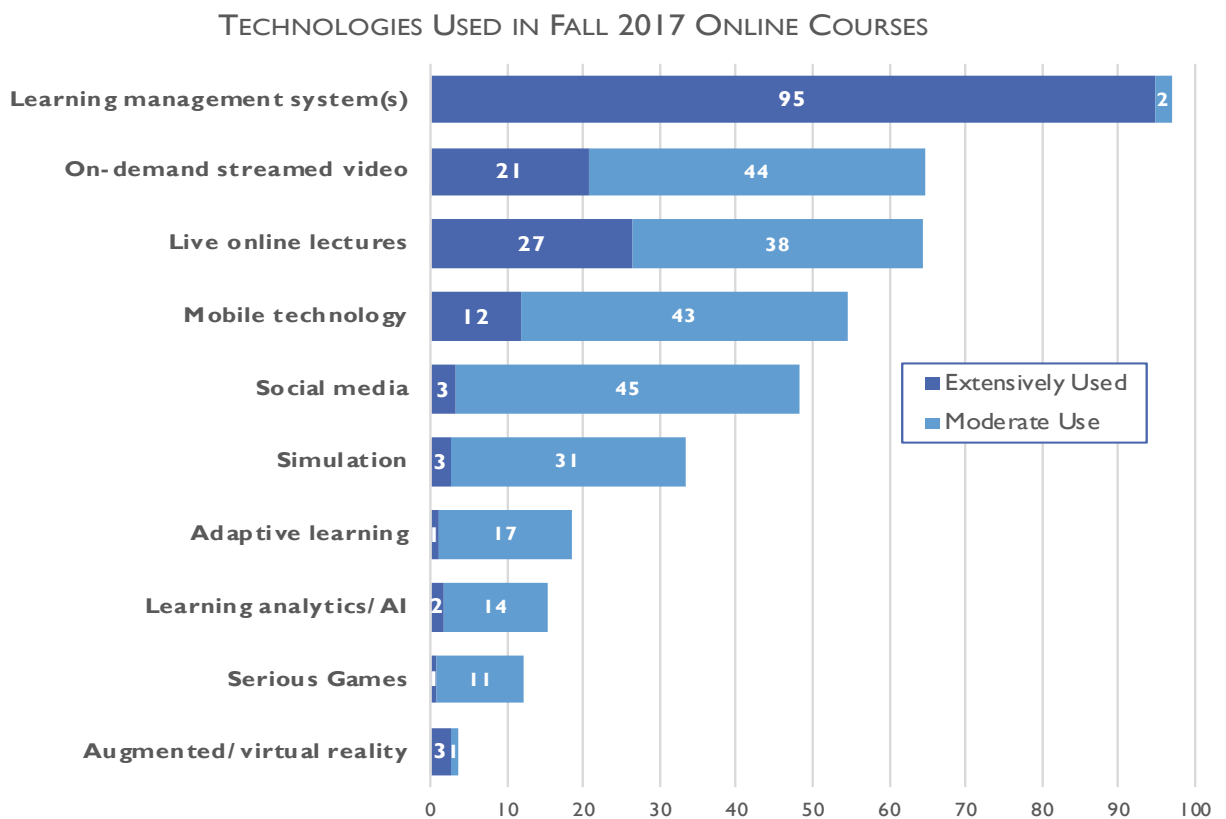


Chart 7.0. Technologies used in online courses: National

A majority of institutions (65%) report moderate to extensive use of on-demand streamed video and also live online lectures. This is consistent with the 2017 result of 62% indicating moderate to extensive use.

The addition of the questions on innovative technologies in higher education illustrate that just over half of institutions report moderate use of mobile technology (55%), and social media such as blogs and wikis are being used in about half the responding institutions. Simulations are being used in about one third of the responding institutions. There is also some experimentation being done with emerging innovative technologies such as adaptive learning (20%), learning analytics (16%) and serious games (12%). However, very few responding institutions are using augmented and virtual reality (less than 5%).

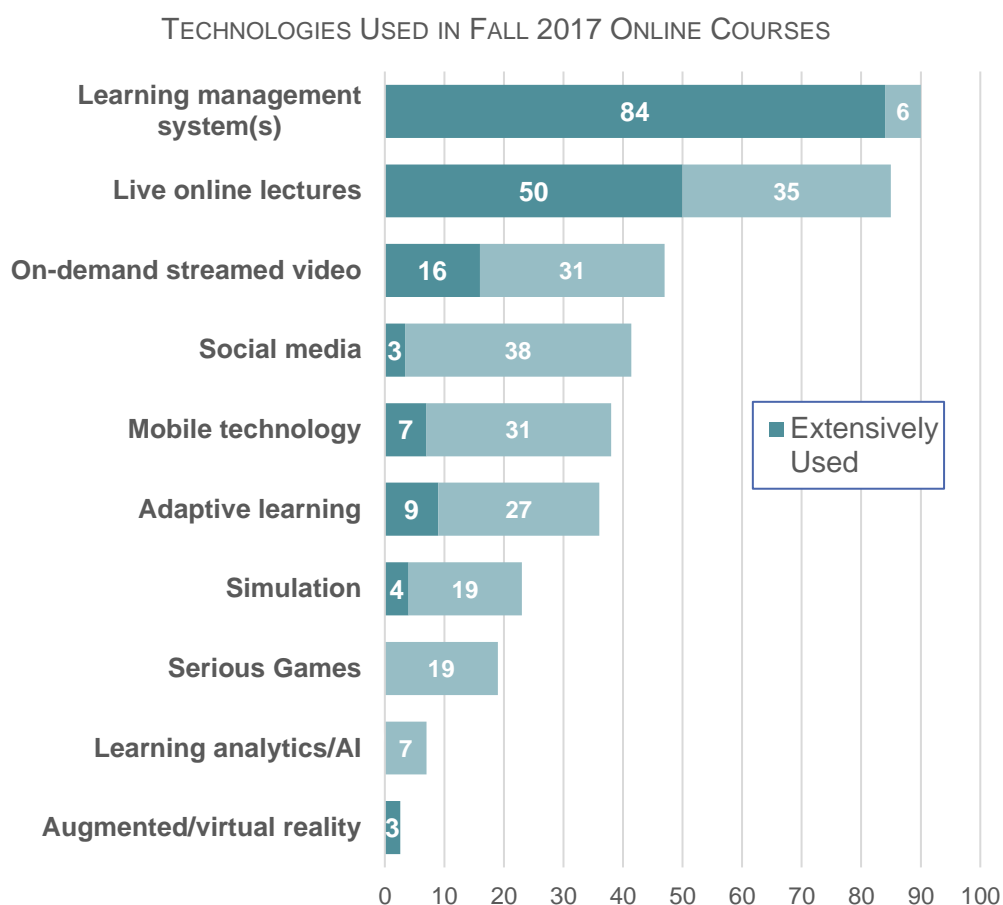


Chart 7.1. Technologies used in online courses: Québec

The majority of Québec responding institutions (84%) report using an LMS extensively for their online courses. All of the Québec universities and the private subsidized colleges reported extensive use of an LMS, while just 69% of the CEGEPs responded that they use an LMS extensively.

Responses from Québec institutions to the question of which technologies are used in their online courses show a higher percentage of reported use of live online lectures (85%) and slightly lower use of on-demand streamed video (46%) than in other jurisdictions. A higher proportion of institutions in Québec reported use of adaptive learning (36%), simulation (23%), and serious games (19%).

Similar questions were asked about the use of technologies in blended/hybrid courses. There are few differences between the use of technologies for blended/hybrid learning courses and for fully online courses, the main difference being a slightly higher percentage of institutions using streamed video for blended/hybrid courses (71%) than for fully online courses (65%).

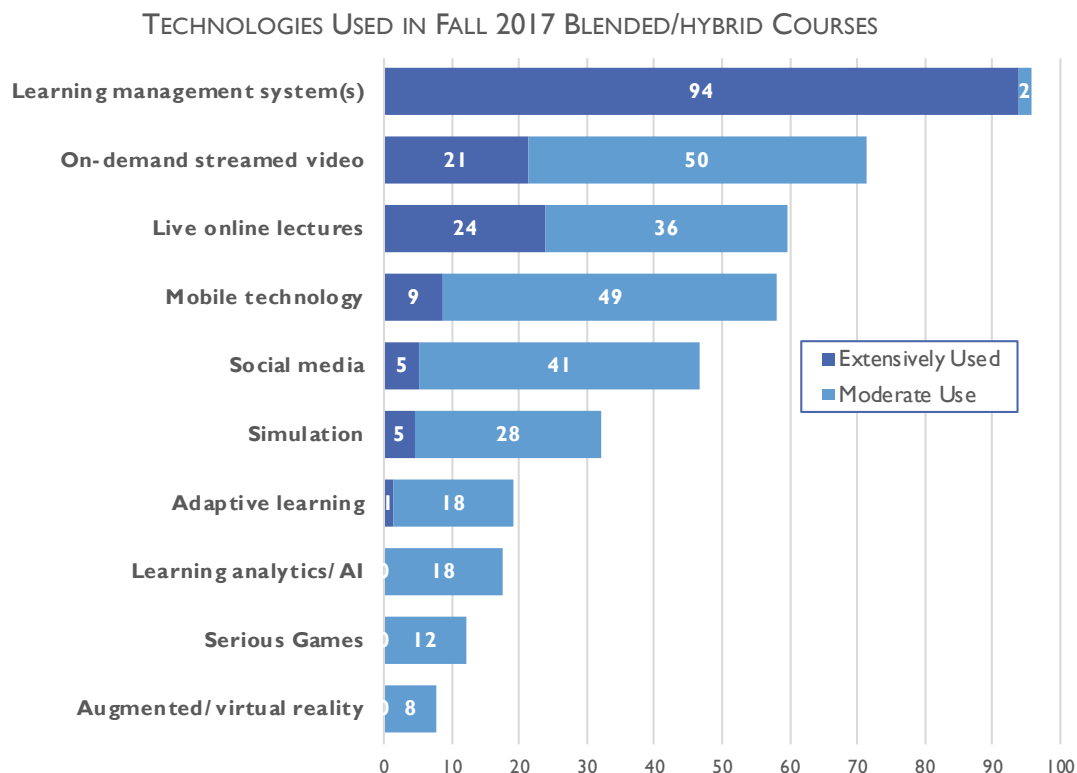


Chart 7.2. Technologies used in blended/hybrid courses: National

As we speculated in 2017, it may be that some of the more experimental applications of technologies by individual faculty members are not known by the institutional respondent(s). It may be even more difficult for institutions to know what technologies are being used for blended/hybrid learning, as illustrated by a comment from one Ontario university:

Blended courses utilize a wide array of technologies often chosen (and managed) by the instructors due to personal preference, familiarity and a perceived limitation of campus tools. There are a variety of tools out there in use by instructors that we may or may not be aware of centrally.

Responses from Québec institutions show interesting differences in the use of some of the technologies employed in blended/hybrid courses. Québec institutions were more likely to report extensive use of live online lectures, adaptive learning and serious games and the results show a lower rate of use of on-demand streamed video than their counterparts across the country.

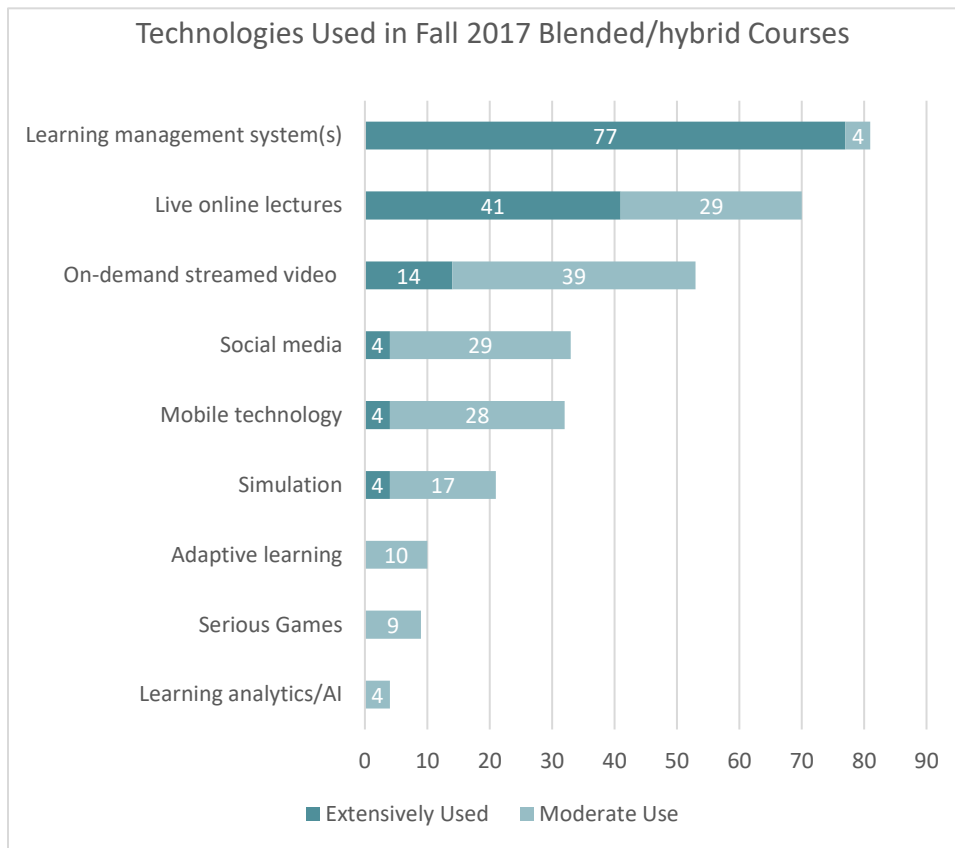


Chart 7.3. Technologies used in blended/hybrid courses: **Québec**

We invited institutions to share further thoughts on the technologies being considered for the future, and 56 institutions provided open-ended responses.

Technology	Mentions
Virtual, Augmented Reality	10
Adding/improving video/audio conferencing	7
More extensive use of video and lecture capture	5
Data Analytics	4
Mobile	3
ePortfolios	3
Adaptive Learning	2
e-Textbooks/OERs	2
Makerspace	1
Grading tools	1
Tools for collaboration	1

While the reported usage of adaptive learning, augmented reality and virtual reality was low, responses in the open-ended comments illustrate experimentation in courses using virtual reality simulation and augmented reality. Others respondents identified using e-portfolios, 3D printing, 360-degree videos, and drone technologies as well as virtual learning through game-based simulations. A number of the comments indicate that experimentation is occurring in face-to-face classes as well as in online and blended/hybrid courses.

The institutions responding to the survey are at varying levels of maturity in the adoption of technologies for teaching and learning. For some, planning of integration of faculty video and/or video-conferencing is on the horizon, while others are experimenting with virtual reality, simulation, serious games and adaptive learning.

MOOCs

Only a few post-secondary institutions in Canada (18%) offered MOOCs in the previous year. Of the institutions responding to this question, 14% indicated they offered between one and five MOOCs; while 3% indicated they offered six or more MOOCs in the last year. Universities (29%) were more likely to offer MOOCs than colleges outside Québec (13%) or CEGEPs (7%)

OFFERED ANY MOOCs IN THE LAST 12 MONTHS?

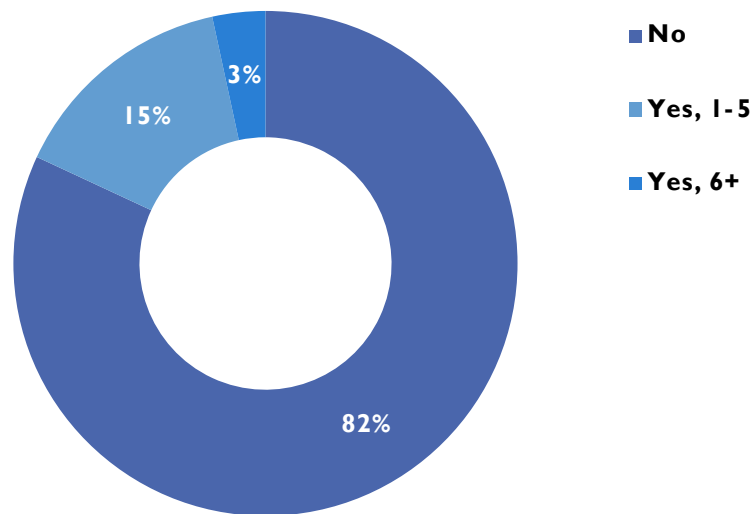


Chart 8.0. Offer MOOCs in last twelve months: National

INSTITUTION'S PLANS FOR MOOCs IN THE FUTURE

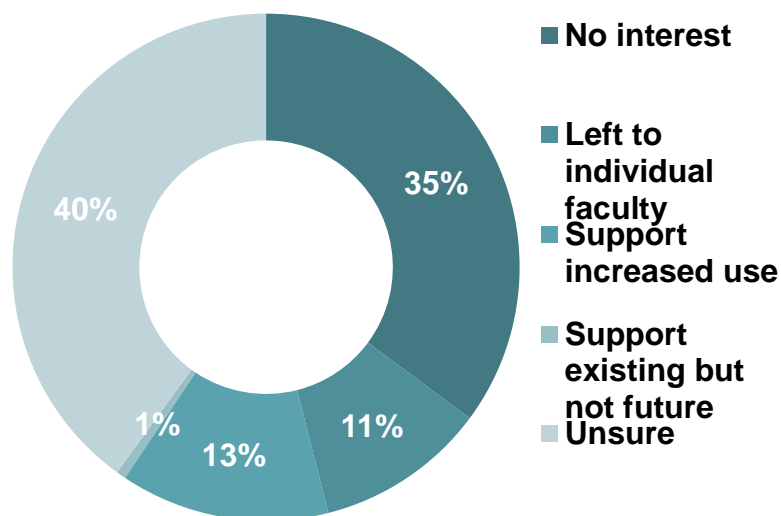


Chart 8.1 Institution plans for MOOCs in the future

There appears to be little future interest in offering MOOCs with 40% unsure of their future plans for MOOCs, and 36% indicating they have no interest in offering MOOCs in the future. The remaining 25% were split, with 13% willing to support the increased use of MOOCs in future, and 11% leaving it to individual faculty to decide without necessarily providing institutional support.

In Québec, eleven of 63 institutions (18%) indicated they have offered MOOCs in the last twelve months, and 10 of 55 responding institutions indicated they may support faculty interest and increase MOOC support in the future.

Four of the 11 Francophone institutions located outside of Québec reported that they have offered a MOOC in the last twelve months.

STRATEGIES AND PLANS

Online learning is very or extremely important for the institution's long-term strategic or academic plan in 68% of responding institutions. Most responding institutions recognize the importance of having a plan or strategy for e-learning:

- 65% either had a plan or were developing one;
- Just under a third (30%) did not have a plan, but reported that they needed one;
- Only 5% reported that a plan or strategy was not needed;

Institutions cited the ability to increase student access as the most important reason for implementing online learning, with 95% of institutions rating it as either important (23%) or very important (72%); second in importance was accessing students from outside the regular catchment area (88% reported this as important or very important). The most significant barrier was identified as the additional faculty effort required to develop or deliver online courses (85%), followed closely by inadequate training/pedagogical knowledge available for faculty in online learning (73%), then the lack of acceptance of online instruction by faculty (62%).

The importance of online learning for the future of the institution

Over two-thirds (68%) of responding institutions reported that online learning was very or extremely important for their long-term strategic or academic plan (compared to 66% in the 2017 survey). Larger institutions placed more importance on online, with 81% of those with 10,000 or more students reporting online learning very or extremely important for their future, compared with 56% of the institutions with fewer than 1,000 students.

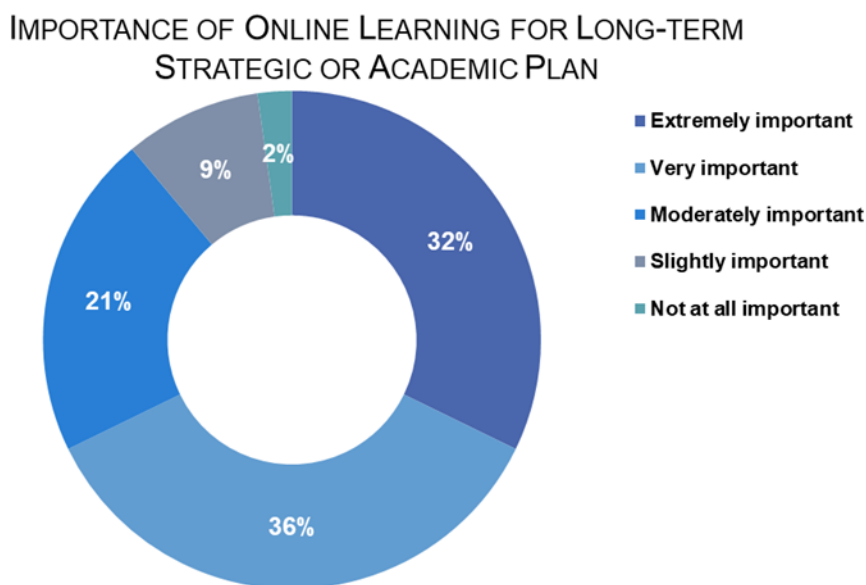


Chart 9.0 Importance of online learning for institutions plans: National

In particular, 81% of colleges outside Québec, and 68% of universities, reported that it was very or extremely important. The perception of the importance of online learning was not as high in the CEGEPs, where just 53% agreed it was very or extremely important to their institution, 28% said it was moderately important and 16% reported it was slightly important.

Ontario and Nova Scotia tied with the highest provincial percentage (80%) of institutions that considered online learning strategically important for their future. British Columbia and Alberta were close behind at 76% and 75% respectively. **In Québec, 60% of the institutions identified online learning as extremely important or very important.** The provinces of Manitoba (38%) and Saskatchewan (50%) were the areas with the lowest numbers in terms of strategic importance of online learning.

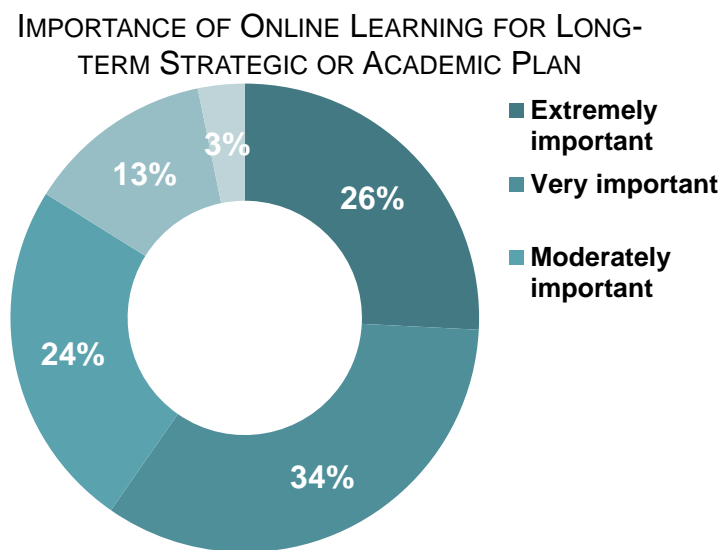


Chart 9.1. Importance of online learning for institutions plans: **Québec**

Strategic plans for online learning

Most responding institutions recognize the importance of having a plan for e-learning. Only 5% reported that a plan or strategy was not needed, and almost two thirds either had a plan or were developing one. Just under a third (30%) did not have a plan, but reported that they needed one.

Nearly half (45%) of the institutions in the size range of 1,000-4,000 did not have a plan but reported that they needed one. Very small institutions (fewer than 1,000 students) were most likely to report that they did not need a strategy.

STATUS OF STRATEGIC PLAN FOR E-LEARNING, HYBRID LEARNING AND/OR ONLINE LEARNING

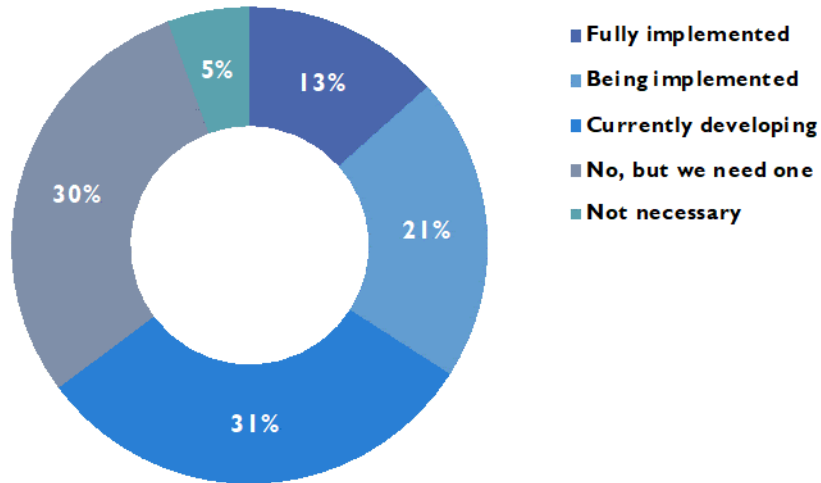


Chart 9.2. Status of strategic plan: National

STATUS OF STRATEGIC PLAN FOR E-LEARNING, HYBRID LEARNING AND/OR ONLINE LEARNING

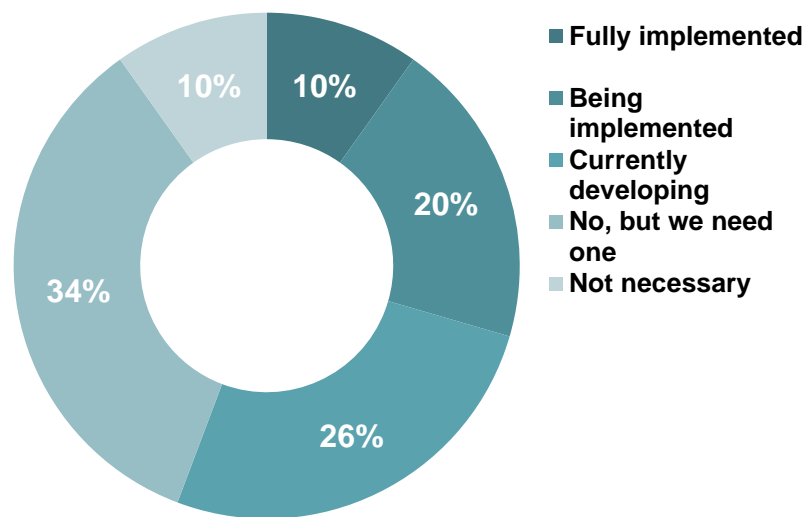


Chart 9.3. Status of strategic plan: Québec

The results from Québec institutions indicate a lower than the national average displayed in Chart 9.2: 6 (10% indicated they had a plan that was fully implemented; 12 (20%) were in the process of implementing their plan; 16 (26%) reported that they were currently developing a plan and 21 institutions (34%) reported that they do not yet have a plan, but recognize they need one. Of the 61 responding institutions, 6 (10%) reported that a plan was not necessary.

Responses to the question on strategic plan status varies by institution type and if located within or outside Québec. A breakdown of the responses for each group is provided in Chart 9.4.

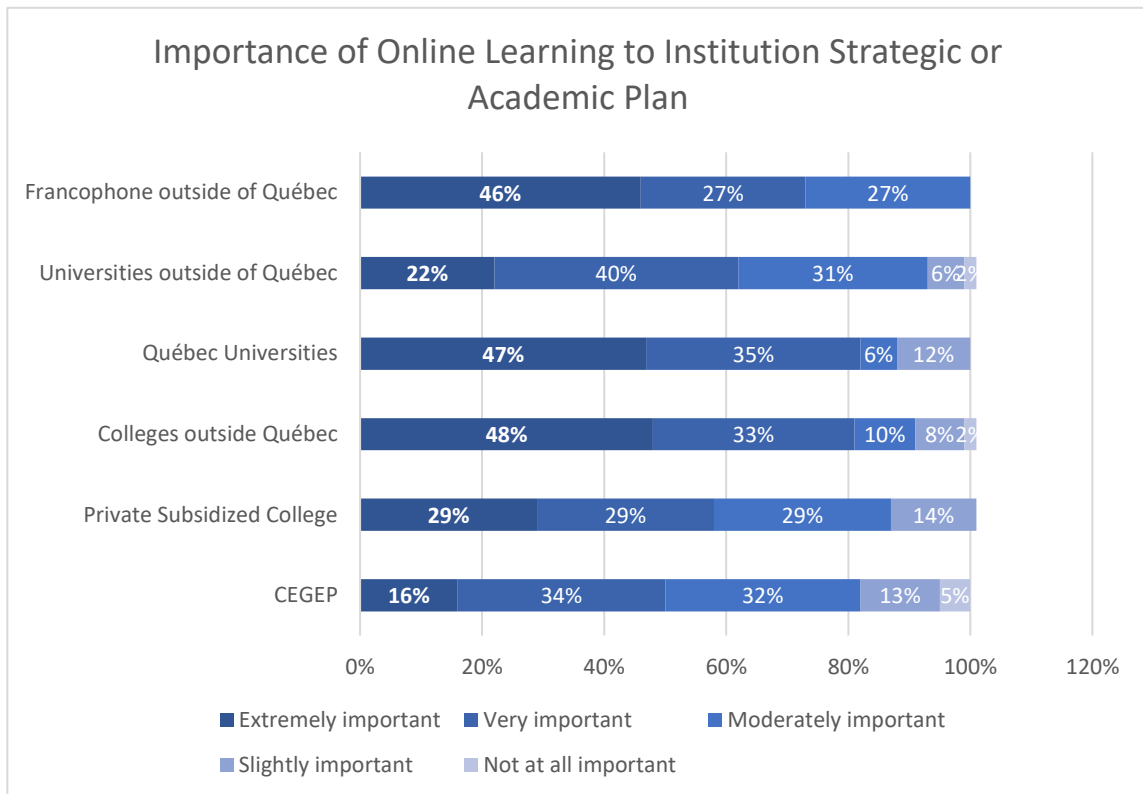


Chart 9.4. Importance of Online Learning by Institution Type and Location

The differences in responses of very important range considerably across the types of institutions, particularly from the CEGEPs and private subsidized colleges with other colleges and universities across the country.

Institution responses to the question of status of a strategic plan or institutional strategy were lowest for the CEGEPs where just 2 of 37 responses indicating they had a plan that was fully implemented. Chart 9.5 below provides a breakdown of status by each institution type and geographic location (inside or outside of Québec).

The responses for the private subsidized institutions, and Québec universities were similar to colleges and universities outside of Québec, although Québec universities were most likely (35%) to report that they were currently implementing a strategic plan or institutional strategy for eLearning/hybrid learning.

The numbers of responses for the private subsidized colleges were derived from 7 responses and therefore need to be considered with caution.

All of the 11 Francophone institutions located outside of Québec indicated online learning was important. However, 8 or 73% selected extremely important or very important and 3 institutions reported it to be of moderate importance.

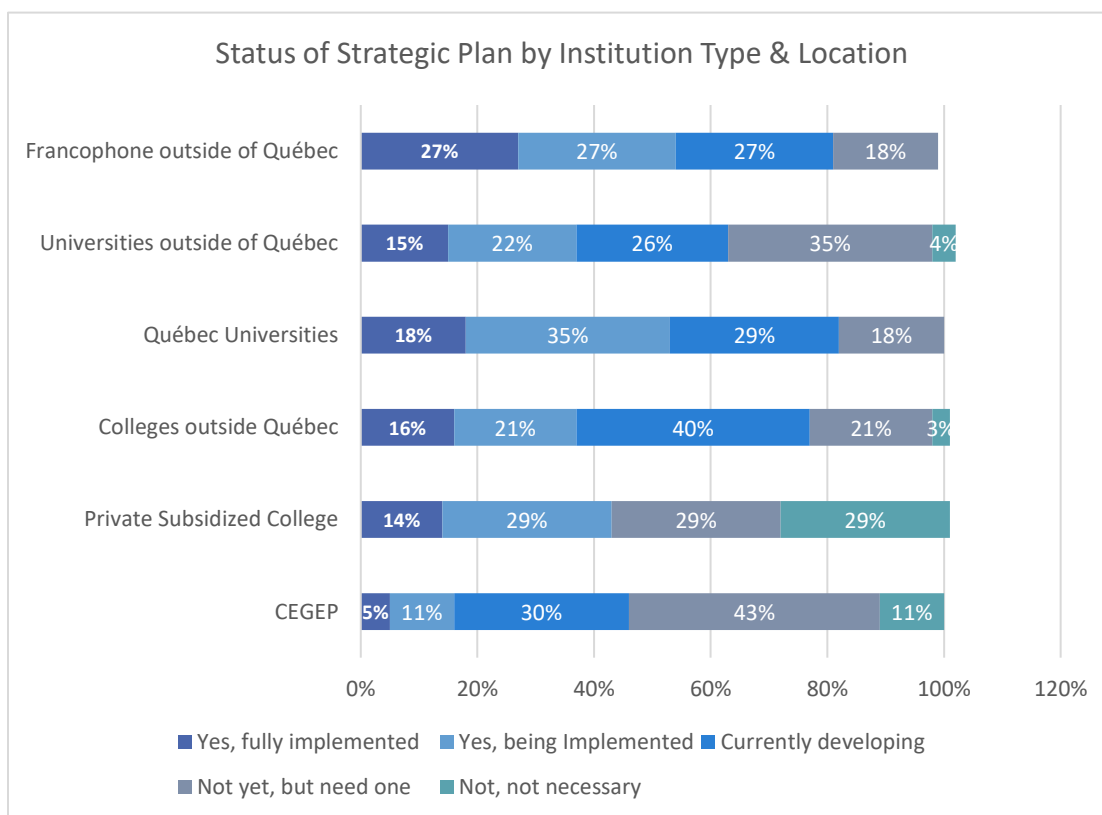


Chart 9.5. Status of Strategic Plan for Online Learning by Institution Type and Location

Just over half (55%) of the Francophone institutions outside of Québec reported that they have a strategic plan that is either being implemented or is fully implemented and two institutions responded that they do not have a plan in place but need one.

The Strategic Importance of Online Learning for Institutions

Institutions were queried about the reasons they considered online learning strategically important. The most important reason for online learning for most institutions was to increase student access, with 95% of institutions rating it as either important (23%) or very important (72%).

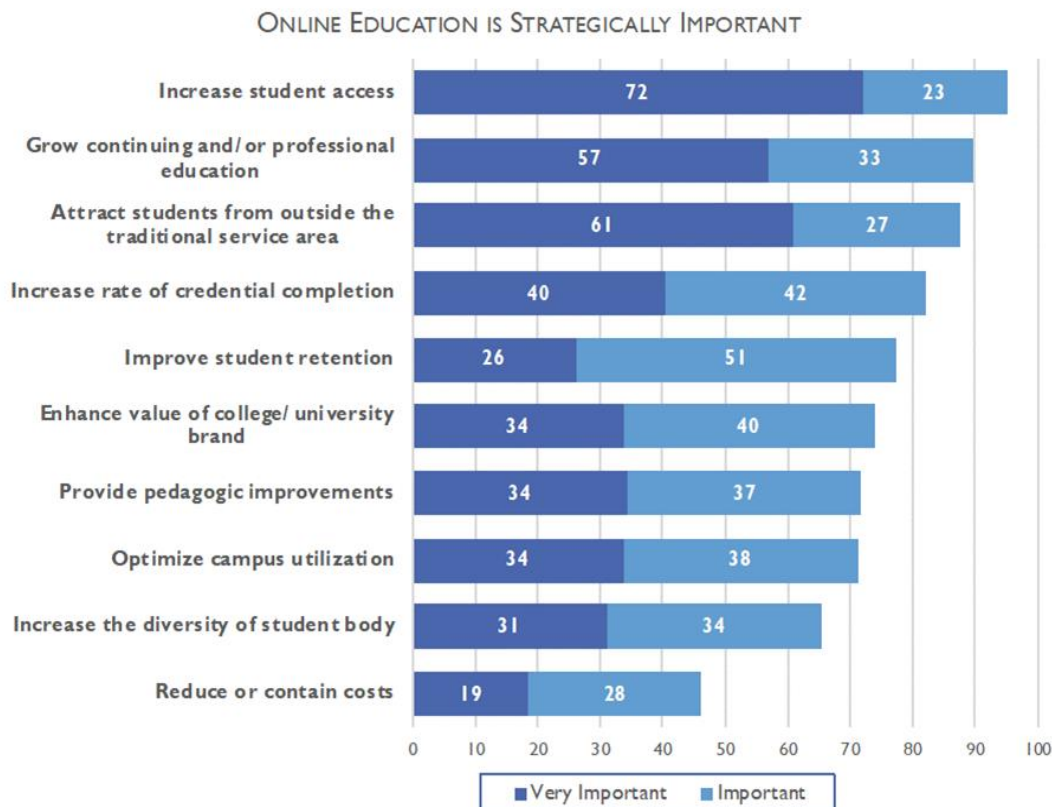


Chart 9.6 Strategic importance of online learning: National

Closely linked in second place was the opportunity to access students from outside the regular catchment area. For 61% of institutions, this was very important and for another 27%, it was important. This was particularly so for institutions in the Maritime provinces, where almost two thirds of the institutions rated this as important or very important. For 57% of institutions online learning was very important for growing continuing/professional education.

For most institutions, using online education to contain or reduce costs was not considered as important as the other reasons, with only 19% rating it as very important.

In general, universities and colleges were similar in their rating of each of these reasons for importance, except that universities and CEGEPs both rated it more important for pedagogical improvement than colleges outside Québec. Colleges outside Québec were also more inclined to rate the importance of online learning higher for reducing/containing costs and for optimizing campus utilization. CEGEPs also rated the importance of online learning for increasing student diversity.

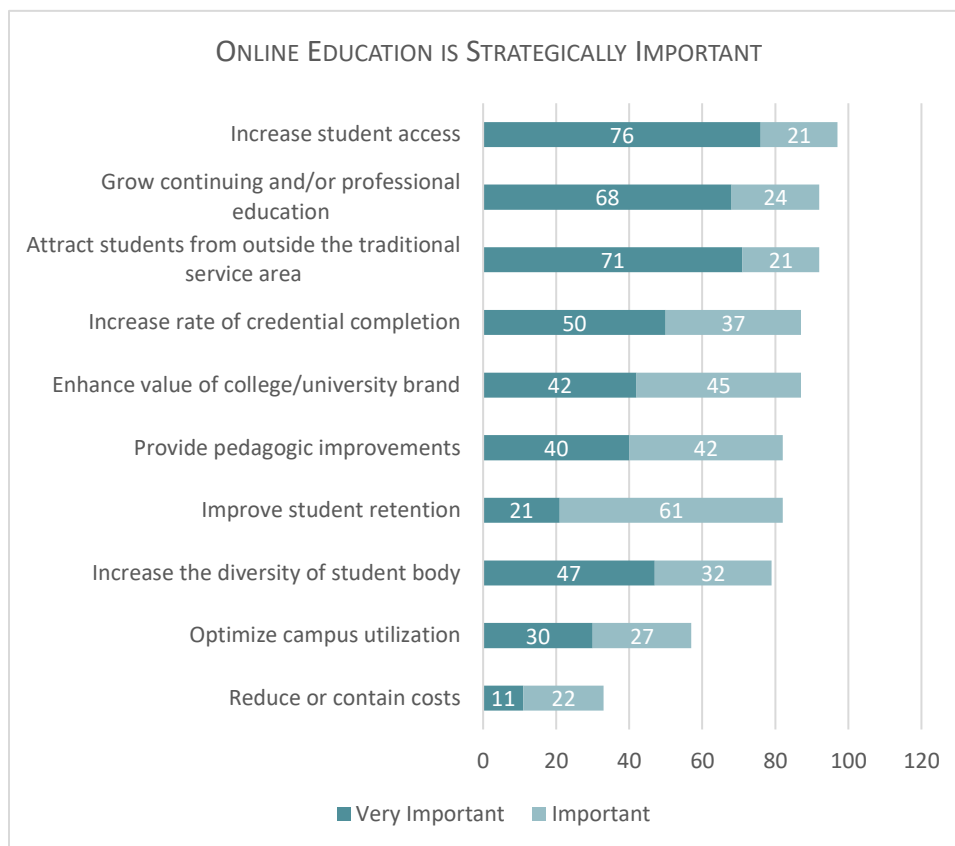


Chart 9.7 Strategic importance of online learning: Québec

The response from Québec institutions to questions on the strategic importance of online learning align with responses from institutions across the country. Institutions in Québec were more likely (71% compared to 61%) to identify online learning as strategically important as a means to attract students from outside the traditional catchment area.

The proportion of Québec institutions that identified increasing student access as strategically important is comparable with the national response with 97% of Québec institutions rating it as very important; and 95% of institutions across the country rating increasing student access as very important strategically.

Barriers to the adoption of online learning

Institutions reported that the most significant barrier to the adoption of online learning was the additional faculty effort required to develop or deliver online courses. This was considered important or very important by 85% of responding institutions. This was followed closely by inadequate training/pedagogical knowledge available for faculty in online learning, rated important or very important by 73% of institutions. The third most significant barrier was also related, lack of acceptance of online instruction by faculty (62% of institutions).

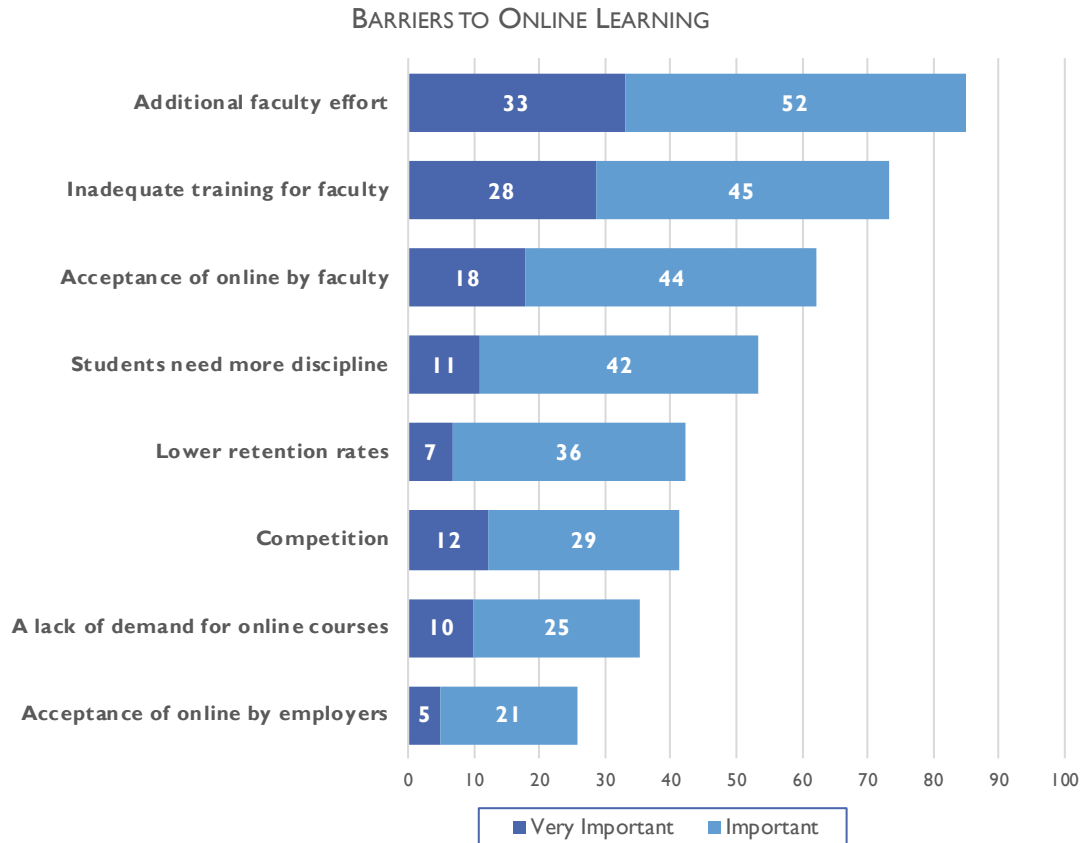


Chart 9.8. Barriers to online learning: National

The least significant barriers identified were lack of acceptance of online learning by employers, 59% did not think this was an important reason; and lack of demand for online courses (54%).

There was very little difference in the responses from Québec institutions to the question of barriers to online learning. Chart 9.9 below provides the Québec results.

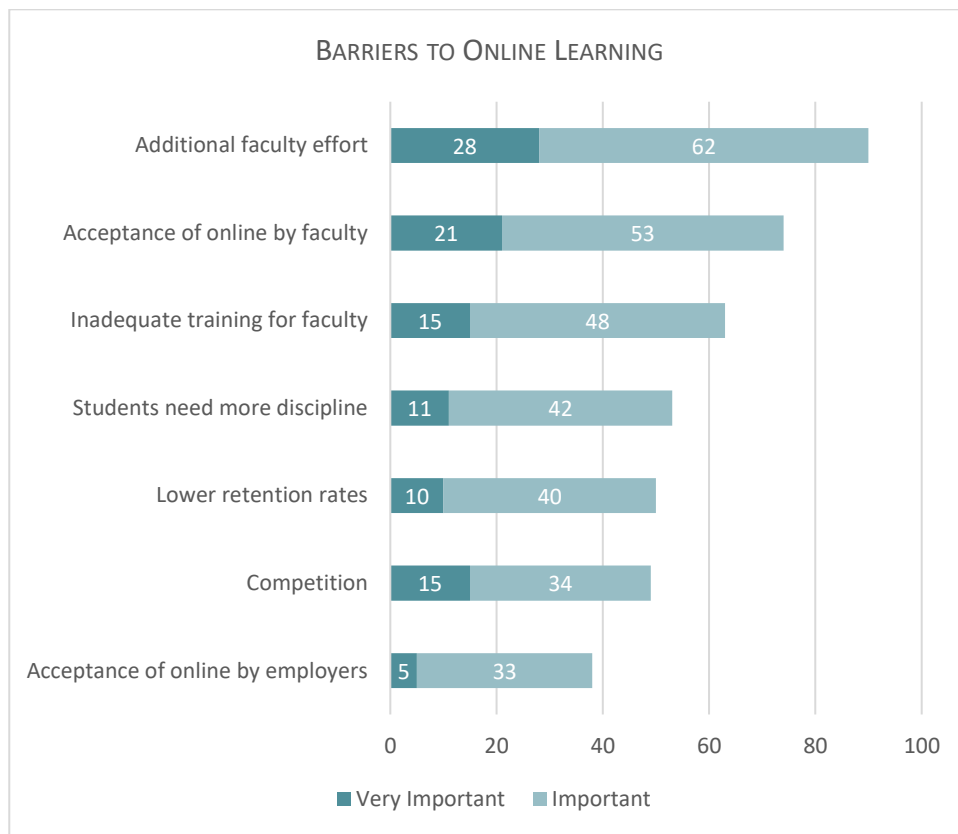


Chart 9.9. Barriers to online learning: **Québec**

Future Developments:

As in 2017, institutions were invited to share their insight into areas they were considering for future developments., by responding to the question:

Are there any comments you would like to share on likely future developments regarding e-learning, hybrid learning and/or online learning?

A couple of institutions highlighted their thoughts on how hybrid learning was the way of the future:

A number of Québec institutions shared areas they were currently engaged in:

À notre avis, l'avenir réside dans la formation hybride Si on ne peut pas présager des changements technologiques à venir dans les 25 prochaines années, on peut toutefois affirmer avec certitude que les êtres humains auront toujours besoin de se rencontrer. Dès lors les salles de classe doivent continuer à exister. D'autre part, on constate que l'apprentissage en ligne comporte actuellement son lot d'échecs et d'insatisfaction. Les expériences et la recherche montrent que la formation hybride doit être valorisée. Québec University

Translated: *In our opinion, the future lies in hybrid training If we cannot predict future technological changes in the next 25 years, we can say with certainty that human beings will always need to meet. Therefore classrooms must continue to exist. On the other hand, we note*

that online learning currently has its share of failures and dissatisfaction. Experiments and research show that hybrid training needs to be valued.

La formation en ligne ne peut être le seul mode d'apprentissage d'un jeune étudiant d'âge collégial (17 - 20 ans) car la relation pédagogique avec le professeur reste un élément important qui est difficilement reproductible dans le contexte de l'apprentissage à distance. Il faut faire la différence entre les besoins des jeunes et ceux d'adultes déjà en emploi régulier pour qui la formation en ligne est une réponse très pertinente, parce qu'elle sauve notamment beaucoup de temps de déplacement. Je pense important que les jeunes continuent d'avoir un LIEU significatif pour leur apprentissage et qu'ils profitent de la présence de leurs pairs et des échanges avec eux pendant leur formation. Mais avec un dosage adéquat, elle peut ajouter de la variété dans les interventions pédagogiques, ce qui stimulera l'apprentissage des étudiants. CEGEP

Translated: *Online training cannot be the only way of learning a young college-age student (17 - 20 years old) because the pedagogical relationship with the teacher remains an important element that is difficult to reproduce in the context of learning. remote. We must differentiate between the needs of young people and those of adults already in regular employment for whom online training is a very relevant answer, because it saves a lot of travel time. I think it's important that young people continue to have a meaningful place to learn and that they benefit from having peers present and interacting with them during their training. But with the right mix, it can add variety to instructional interventions, which will stimulate student learning. CEGEP*

Les mettre dans des projets expérimentaux de formation à distance avec des enseignants qui sont déjà expérimentés en FAD. Mettre en œuvre le e-Campus Québec.

Former et recruter des technopédagogues. "Put them in experimental distance learning projects with teachers who are already experienced in FAD. CEGEP

Translated: *Implement the e-Campus Québec.*

Train and recruit technoépdagogues.

"Put them in experimental distance learning projects with teachers who are already experienced in FAD

Notre établissement continuera d'offrir et de développer son offre de cours multi-sites pour la formation continue. Nous menons aussi un projet-pilote pour offrir des cours avec une approche multi-modale, i.e. l'étudiant choisit son mode d'étude à chaque semaine: en présence, à distance synchrone ou à distance asynchrone. CEGEP

Translated: *Our school will continue to offer and develop its offer of multi-site courses for continuing education. We also run a pilot project to offer courses with a multi-modal approach, i.e. the student chooses his mode of study every week: in presence, remote synchronous or remote asynchronous. CEGEP*

*Amélioration de l'expérience d'apprentissage (personnalisée, ludique, sociale).
Élaboration d'environnements immersifs. CEGEP*

Translated: *"Improvement of the learning experience (personalized, playful, social). Elaboration of immersive environments. " CEGEP*

PERCEPTIONS OF ONLINE LEARNING

Canadian public post-secondary institutions generally hold positive views on online learning:

- Institutions reported that faculty on balance accepted the value and legitimacy of online learning; acceptance was greatest in the colleges outside Québec, then in universities, but less in the CEGEPs, tending towards rejection.
- Online credentials are as respected as face-to-face credentials;
- A clear majority of responding institutions (61%) reported that students were at least as satisfied with online courses as with face-to-face courses;
- Online course learning outcomes are considered by most institutions to be the same as for face-to-face courses, although a few institutions (11%) thought online were inferior;
- Blended/hybrid learning outcomes are considered by most institutions to be the same as for face-to-face courses, although a few institutions (19%) thought blended/hybrid were superior;
- Respondents share a belief that online, blended/hybrid learning can lead to and influence innovative teaching practices.

However, institutions also indicated that:

- A majority of institutions (55%) agreed that retaining students is a greater problem than it is for face-to-face students; this feeling was strongest in CEGEPs, where 79% of CEGEPs agreed with the statement;
- There was general agreement that students need more discipline to succeed in online courses.

Faculty Acceptance of Online Learning

In general, institutions reported that faculty on balance accepted the value and legitimacy of online learning.

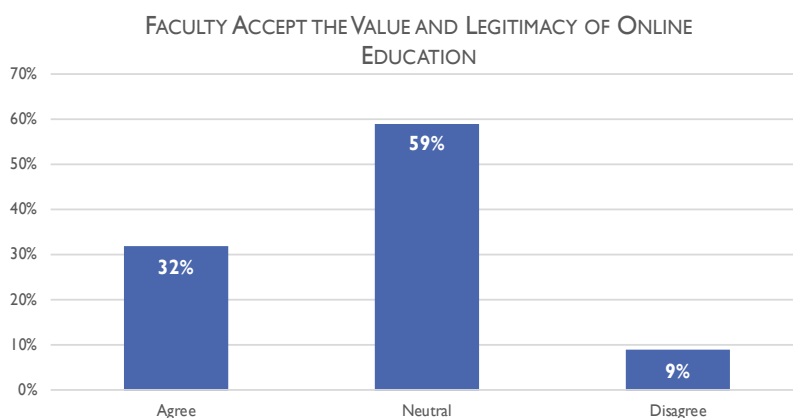


Chart 10.0. Barriers to online learning: National learning.

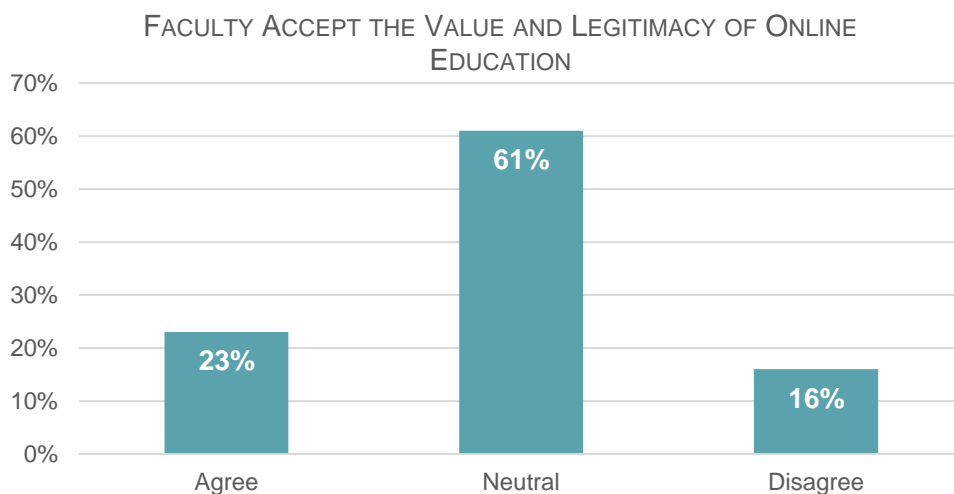


Chart 10.1. Barriers to online learning: Québec

However, acceptance varied considerably between type of institution, and tended to cluster just above neutral (i.e. slightly more to acceptance). Acceptance was greatest in the colleges outside Québec, then in universities and highest in Alberta, British Columbia and Nova Scotia. Acceptance was less in the CEGEPs, tending towards rejection. The private subsidized colleges in Québec were completely split, but the number of institutions responding was very low. **Nearly two-thirds of Québec institutions responded neutral to the question of faculty acceptance of the value and legitimacy of online education.**

Online Credentials

Just under one-half of all institutions see online credentials as having the same level of respect as face-to-face credentials (47%), with most of the remaining being neutral on the issue.

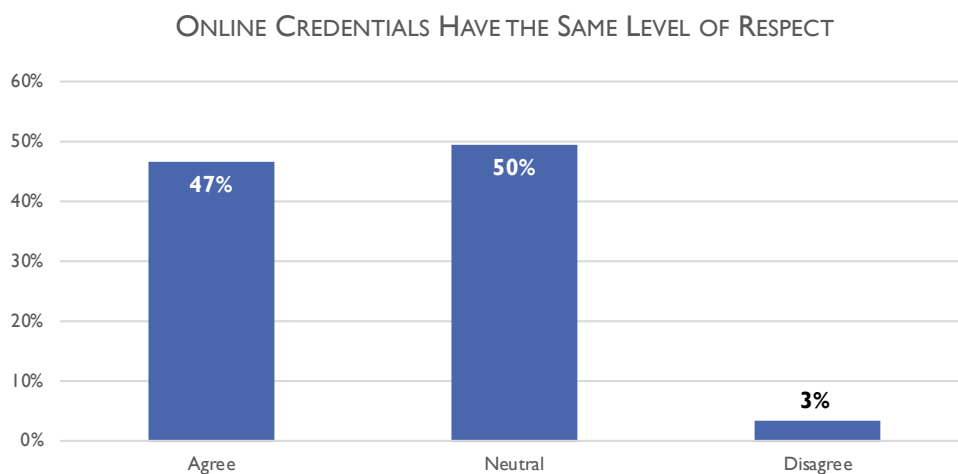


Chart 10.2. Barriers to online learning- Respect: National

ONLINE CREDENTIALS HAVE THE SAME LEVEL OF RESPECT

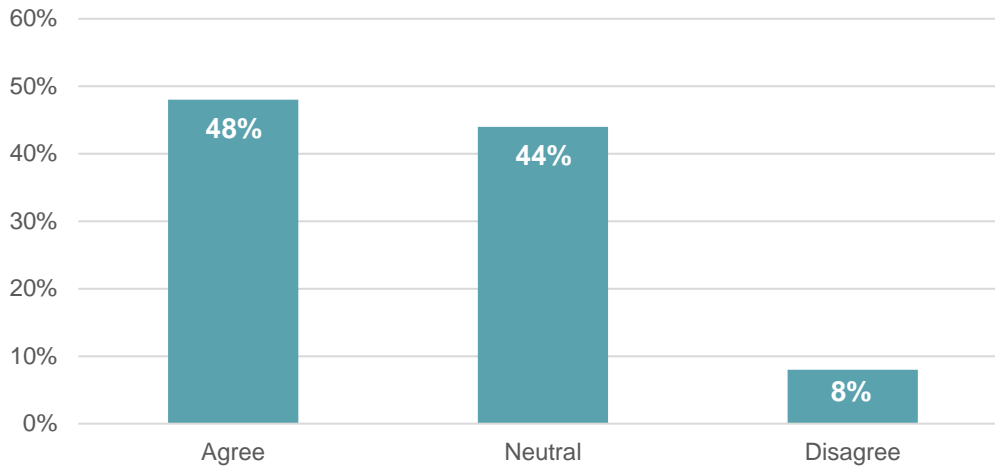


Chart 10.3 Barriers to online learning- Respect: Québec

The response from Québec institutions are similar to the national results, although a higher proportion of institutions (8%) reported they disagree with the statement.

Retention Rates for Online Students

About one quarter of responding institutions (27%) agreed with the statement that retaining online students is a greater problem than it is for face-to-face students. This tendency was strongest in CEGEPs. However, it should be noted that CEGEPs in general have less experience with online courses than other post-secondary institutions in Canada.

RETAINING STUDENTS IS A GREATER PROBLEM FOR ONLINE COURSES

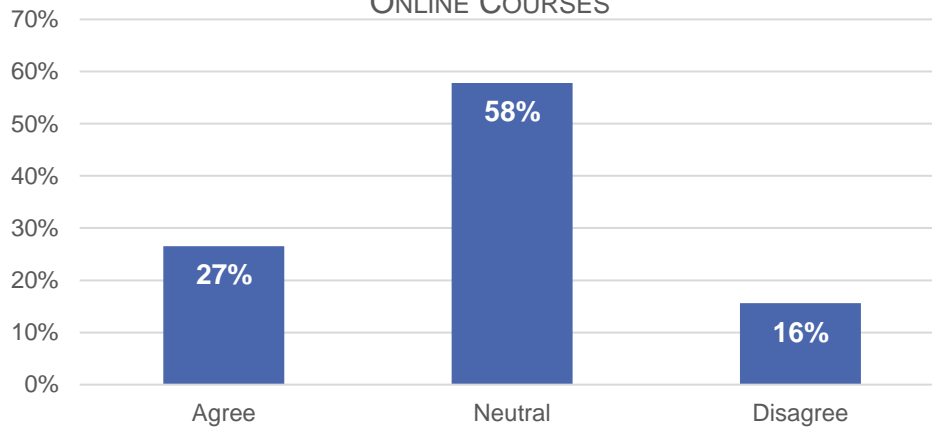


Chart 10.4. Barriers to online learning- Student retention: National

Responses from Québec institutions indicate a slightly higher proportion (32%) believe that student retention is a greater problem for online courses compared to face-to-face courses; 54% were neutral and 14% disagree.

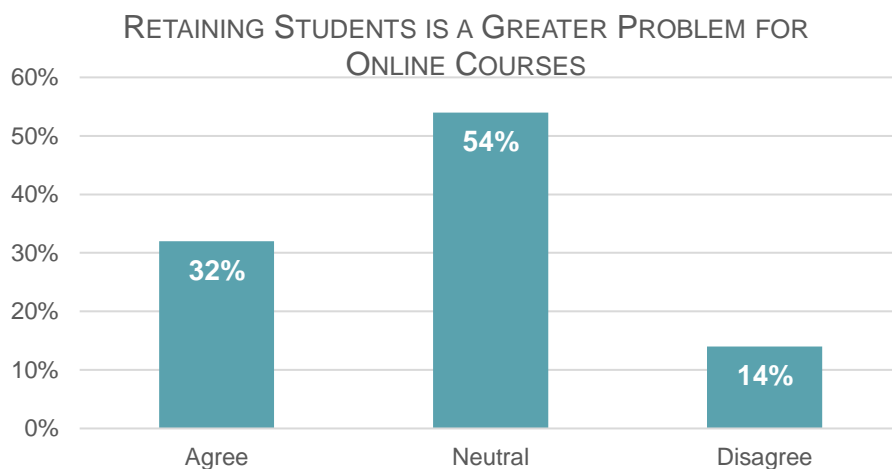


Chart 10.5. Barriers to online learning - Student retention: **Québec**

Student Satisfaction with Online Courses

First, it should be made clear that this question reflects institutional responses, not student responses, to the question of if students are at least as satisfied with an online course as they are with a face-to-face course. A majority of responding institutions (54%) were neutral on this issue, with 42% agreeing and only 3% that disagreed.

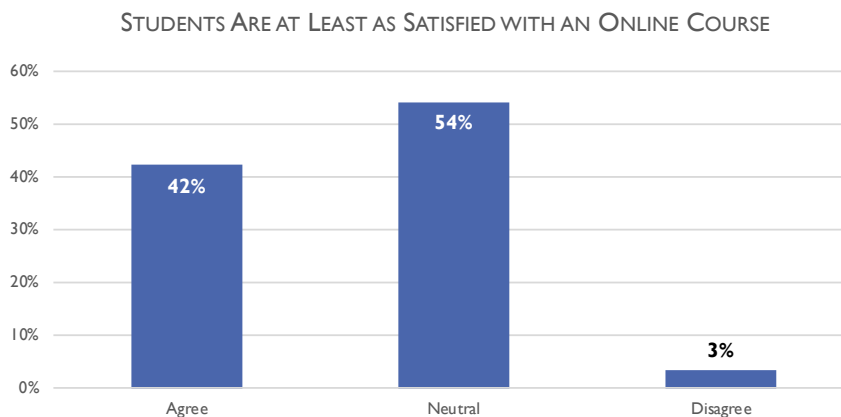


Chart 10.6. Barriers to online learning- Student Satisfaction: National

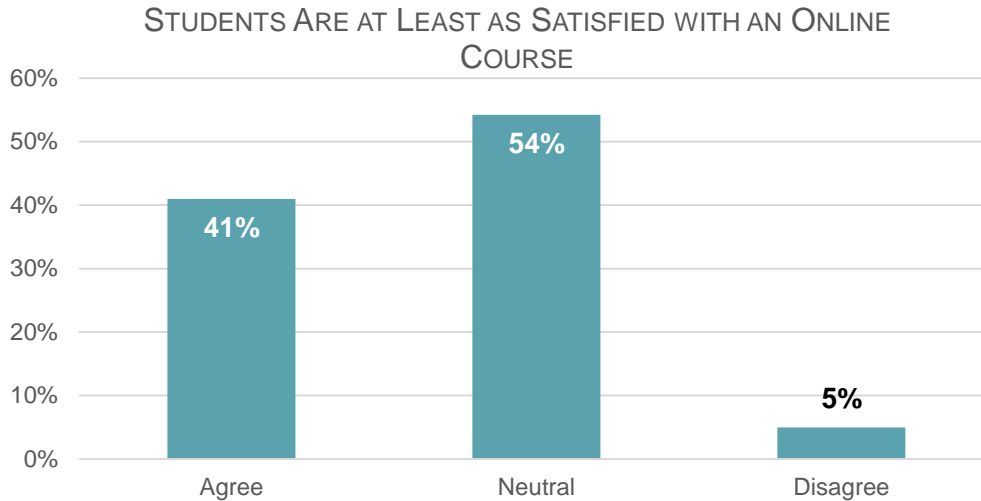


Chart 10.7. Barriers to online learning- Student Satisfaction: **Québec**

There was virtually no difference in the responses from institutions in Québec and the National responses on the question of student satisfaction.

The Need for More Student Discipline in Online Courses

Half of the responding institutions agreed (50%) that students do need more discipline to succeed in online courses, with only 2% disagreeing.

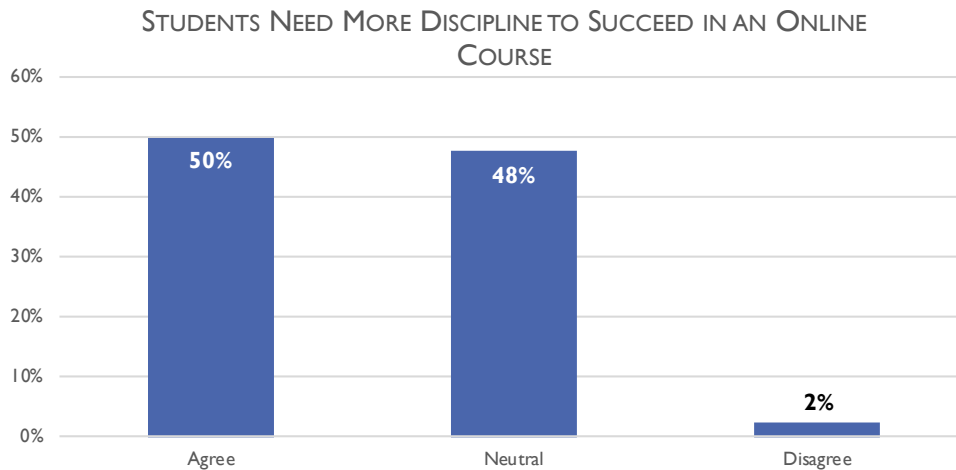


Chart 10.8. Barriers to online learning: Student discipline: National

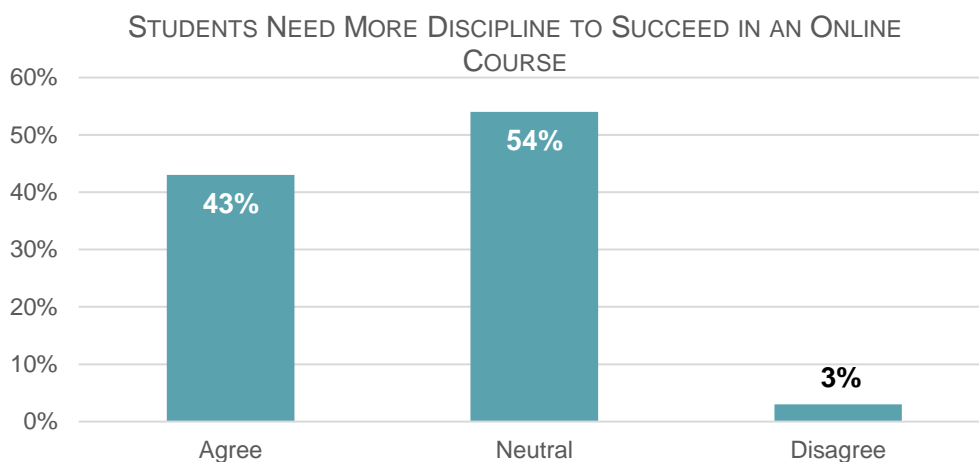


Chart 10.9. Barriers to online learning: Student discipline: **Québec**

As can be seen in comparing Charts 10.8 and 10.9, the responses from Québec institutions were fairly similar to the National response.

Three of the Francophone institutions outside of Québec indicated that that student discipline in online course was very important to success, while just 13% of all Québec institutions agreed.

Learning Outcomes

Institutions were also asked to compare the learning outcomes of online and blended/hybrid courses with those of face-to-face courses. Over three-quarters (78%) of the responding institutions considered the learning outcomes of online courses to be the same as those for face-to-face courses. Thirteen per cent ranked online courses inferior, but nine per cent ranked them superior.

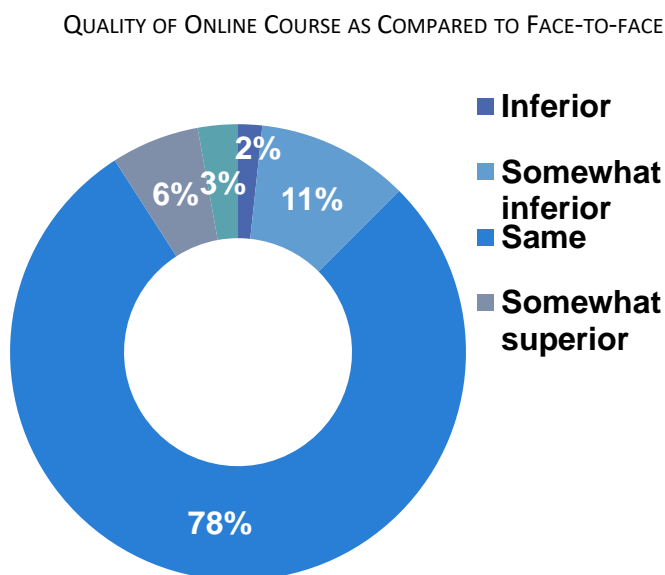


Chart 10.10 Learning outcomes in an online course compared to face-to-face: **National**

QUALITY OF ONLINE COURSE AS COMPARED TO FACE-TO-FACE

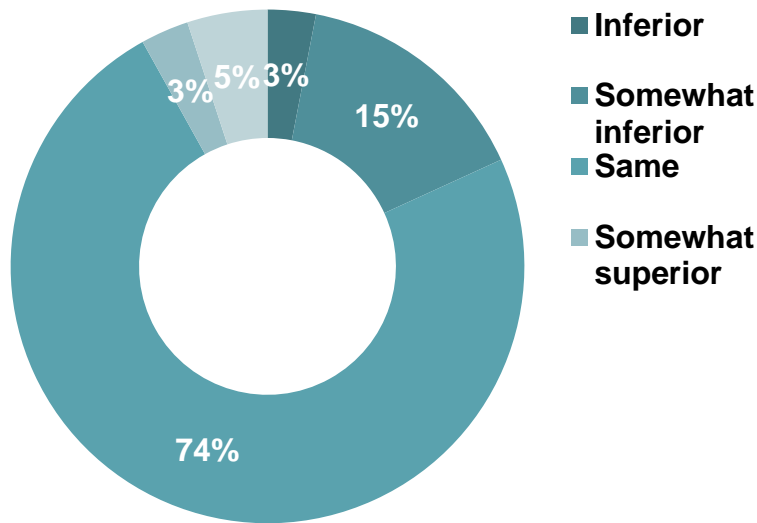


Chart 10.11. Learning outcomes in an online course compared to face-to-face: **Québec**

Most institutions across the country (78%) reported that learning outcomes from online courses were either the same or superior to face-to-face courses, and 74% of institutions in Québec reported they felt the learning outcomes were the same. Responses from Québec universities and **Francophone institutions outside of Québec were both higher than the National average with 82% of responding institutions in both categories indicated they felt learning outcomes in an online course to be the same as face-to-face.**

QUALITY OF BLENDED/HYBRID COURSE AS COMPARED TO FACE-TO-FACE

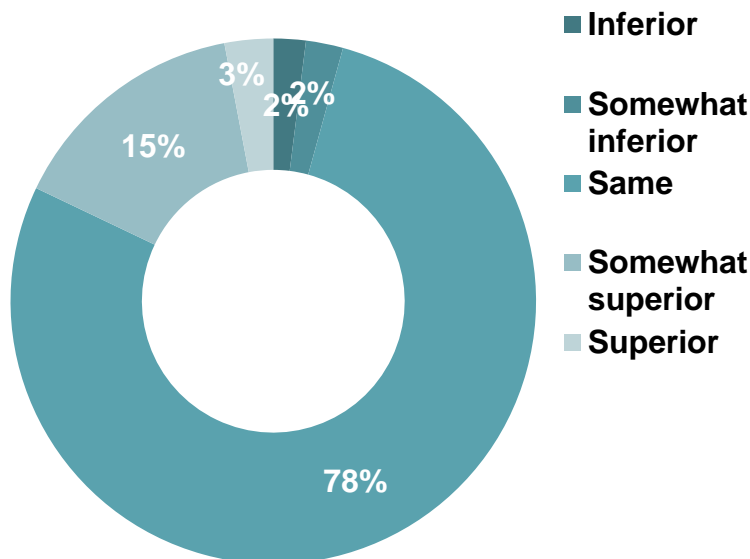


Chart 10.12. Learning outcomes Blended/hybrid courses: **Québec**

A similar proportion (78%) of the responding institutions across the country considered blended/hybrid learning outcomes to be the same as face-to-face learning outcomes. However, in the case of blended/hybrid, 19% considered their outcomes to be superior to face-to-face, while only 3% considered them to be inferior. Once again, there was relatively little difference between CEGEPs, colleges outside Québec, and universities on this question

The results for Québec institutions were similar to the rest of the country on this question of perception of learning outcomes in blended/hybrid courses. Specifically, 78% of Québec institutions indicated they felt the learning outcomes were the same as face-to-face, while 18% reported they believe learning outcomes to be somewhat superior to superior.

Nearly a third of all Québec universities and Francophone universities outside of Québec reported that learning outcomes in a blended/hybrid courses were somewhat superior to face-to-face (29% and 27% respectively). The CEGEPs and Colleges outside of Québec were most likely to consider the learning outcomes the same as face-to-face with 83% of each type providing this response.

In addition, 10 of the 11 Francophone institutions located outside of Québec reported they felt learning outcomes in blended/hybrid courses were the same as face-to-face.

Online, Blended/hybrid Innovative Teaching Practice:

We asked institutions the following question:

Do you believe that offering online or blended/hybrid courses can lead to more innovative teaching? Why or Why not?

Nationally, nearly all (103) responses to this question indicate a belief that that yes, online, blended/hybrid teaching can influence and lead to innovative teaching practice. The majority of responses included references to the importance of sound pedagogy, good planning and course design to support faculty. Some **Québec** institution responses are shared below:

Oui, car nous devons repenser les pratiques pédagogiques. Il est aussi très facile d'innover et d'intégrer la technologie dans les cours.

Translated: Yes, because we have to rethink pedagogical practices. It is also very easy to innovate and integrate technology into the courses. CEGEP

Oui, tout à fait. Les enseignants sont amenés à analyser leur façon d'enseigner. Ils doivent modifier leurs modèles autant au niveau de l'enseignement que des activités d'évaluations. Ils font plus facilement preuve de créativité dans les cours en ligne. Une fois la peur du changement passée, plusieurs confirment que l'enseignement en ligne a changé leur vision du travail et que certaines stratégies sont intégrées par la suite dans les cours en salle de classe. CEGEP

Translated: *Yes quite. Teachers are led to analyze how they teach. They must change their models both in terms of teaching and evaluation activities. They are more easily creative in online courses. Once the fear of change has passed, many confirm that e-learning has changed their vision of work and that some strategies are subsequently incorporated into classroom courses CEGEP*

"Pas nécessairement.

L'utilisation des moyens technologiques comme la visioconférence ou l'enseignement en ligne comporte de nombreux embûches... Le matériel n'est pas nécessairement conçu pour cette forme de prestation de cours (vidéos, tutoriels, logiciels complémentaires) obligeant l'enseignant à recourir à d'autres outils moins performants."

Translated: *"Not necessarily. The use of technological means such as videoconferencing or online teaching has many pitfalls ... The material is not necessarily designed for this form of course delivery (videos, tutorials, additional software) forcing the teacher to use other less powerful tools. "*

Oui, en mettant davantage le focus sur la mobilisation des connaissances et la réflexion collective pour les périodes présentielles. Québec University

Translated: *Yes, putting more focus on knowledge mobilization and collective thinking for the face-to-face periods.*

Oui. Le fait d'utiliser de nouvelles plateformes et de suivre les avancées technologiques peut amener une personne à réévaluer ses stratégies pédagogiques et à en développer de nouvelles. Les échanges avec le personnel de soutien et les collègues peut permettre la co-crédation de solutions et l'innovation.

Translated: *Yes. Using new platforms and tracking technological advances can lead people to re-evaluate their teaching strategies and develop new ones. exchanges with support staff and colleagues can enable co-creation of solutions and innovation.*

Indéniablement, car ce développement incite le professeur à amorcer une démarche réflexive sur ses objectifs d'enseignement, les modalités pédagogiques à favoriser pour favoriser les apprentissages des étudiants. Toutefois une telle démarche exige un accompagnement par des conseillers pédagogiques, ou par du matériel développé à cet effet, ou par un groupe de pairs. Québec University

Translated: *Undeniably, because this development encourages the professor to initiate a reflexive approach on his teaching objectives, the pedagogical modalities to promote to promote*

the learning of students. However, such an approach requires support by educational advisers, or by materials developed for this purpose, or by a peer group. Québec University

Some responses highlighted the advantages they believe inherent in moving to online education:

La formation à distance impose à l'enseignant de revoir ses approches et stratégies d'enseignement, impose à celui-ci de revisiter ses techniques et repenser l'évaluation. Cette remise en question, et l'ouverture requise pour le faire, invite à explorer des techniques ou approches innovantes.

Translated: Distance learning requires the teacher to review his teaching approaches and strategies, requires him to revisit his techniques and rethink the evaluation. This challenge, and the openness required to do so, invites you to explore innovative techniques or approaches.

Définitivement, les enseignants doivent revoir leurs façons d'enseigner, toute la pédagogie doit être revue. CEGEP

Translated: Definitively, teachers must review their ways of teaching, all pedagogy must be reviewed. CEGEP

The majority of the comments shared perspectives on how online and blended courses can support teaching growth and help faculty grow their practice with good designs and supports in place. This comprehensive comment conveys the impact of teaching online for faculty in distance and blended/hybrid courses on teaching practice.

Oui, tout à fait. Dans notre cégep, tout enseignant qui prend la charge de cours à distance se voit libéré pour préparer la pédagogie de son cours à distance avec l'accompagnement d'une technopédagogue. Ce que l'on observe, c'est que les compétences développées pour enseigner à distance ont des bénéfices bien au-delà du cours que l'enseignant a préparé. Ce sont l'ensemble des compétences pédagogiques et technopédagogiques qui sont développées par le fait même. Bien des enseignants vont par exemple transformer la manière de rendre leur matière pour que leur enseignement implique davantage les étudiants que l'on veut garder attentifs même à distance. Or, cette transformation est conservée lorsque l'enseignant se retrouve à nouveau avec une classe en présentiel : on voit là aussi les bénéfices à s'éloigner d'un enseignement magistral. Aussi, dans les cours à distance, de plus en plus de matériel est créé (médiatisé sur des plateformes d'apprentissage) avec pour objectifs de diminuer le temps d'écoute statique et pour donner des ressources aux étudiants de manière asynchrone à l'extérieur des cours. Les enseignants qui ont développé de tels matériels sont ceux qui arrivent éventuellement avec des projets de cours hybrides (synchrones/asynchrones), là où il y a une forte demande des étudiants qui ont des besoins particuliers (étudiants-athlètes, parents en conciliation famille-travail, étudiants qui travaillent, parcours atypiques générant des conflits d'horaire, etc.). De manière générale, les enseignants impliqués dans l'enseignement à distance font un plus grand usage des TIC dans leur enseignement, des compétences que l'on vise à développer chez nos diplômés.

Translated: Yes quite. In our CEGEP, any teacher who takes charge of distance learning is released to prepare the pedagogy of his distance course with the accompaniment of a technopédagogue. What we observe is that the skills developed for distance learning have benefits far beyond the course that the teacher has prepared. It is the set of pedagogical and technopedagogical skills that are developed by the very fact. Many teachers will, for example, transform the way of making their subject matter so that their teaching involves more students than one wants to keep attentive even at a distance. However, this transformation is maintained when the teacher finds himself again with a classroom in class: we see here also the benefits to move away from a lecture. Also, in the distance courses, more and more material is created (mediated on learning platforms) with the aim of reducing the static listening time and to give the students resources asynchronously outside lessons. Teachers who have developed such materials are those who eventually arrive with hybrid course projects (synchronous / asynchronous), where there is a strong demand from students with special needs (student-athletes, parents in family reconciliation). work, students working, atypical courses generating scheduling conflicts, etc.). In general, teachers involved in distance education make greater use of ICT in their teaching, skills that we aim to develop among our graduates.

CANADA & US COMPARISON

Distance education is more firmly established in the United States than it is in Canada. The latest data for U.S. higher education institutions shows that 33 percent of all students took at least one distance course as of fall 2017, a rate double that of Canada. Given this longer history and higher concentration of online activity, do the academic leaders in the U.S. and those in Canada share the same views about the role and success of distance education?

To test this question, we administered the policy and practice portions of the 2018 Canadian survey to a representative sample of chief academic officers (the highest-ranking individual responsible for the academic programs, typical titles are provost, academic vice president, etc.) in the United States. The objective was to compare the experiences and opinions of those at institutions with for-credit distance course offering, so the responses from the 172 Canadian institutions that have for-credit online offerings were compared to a representative random sample of US academic leaders from 112 institutions with for-credit online offerings.

In general, the pattern of responses between the two countries is very similar, and where there are differences, it is the Canadian respondents that are the more positive towards online education.

There was no specific comparison with Québec institution responses and a US response. A detailed comparison of the results is available in the Public Report.

BACKGROUND TO THE 2018 SURVEY

In 2017, a team of independent researchers secured funding and developed a national survey of online learning and distance education in Canadian public post-secondary education. There had been isolated studies of parts of the Canadian system before, and similar studies had been done in the USA, originally by the Babson Survey Research Group (a partner in our study) and later by the United States Department of Education's Integrated Postsecondary Education Data System survey (IPEDS). However, the 2017 Canadian survey was the first comprehensive survey of online learning in Canadian publicly funded universities and colleges.

Funding was raised primarily from provincial government agencies established to support online and digital learning, such as eCampus Ontario, BCcampus, Campus Manitoba and Contact North along with contributions from Pearson Canada, D2L and the Ministère de l'Éducation et de l'Enseignement supérieur (Québec). A main report and several sub-reports, were published in the fall of 2017. Reports are available in English and French³.

Although the survey was both new and voluntary, there was an excellent institutional response, with 69% of institutions covering 82% of the student population responding. The 2017 survey indicated that online learning was alive and well in Canadian post-secondary institutions, with 85% of all responding institutions offering at least some online learning for credit in 2016, and with courses offered in almost all subject areas. Two-thirds of responding institutions stated that online learning was considered very or extremely important for their long-term future.

Goals of the 2018 Survey

Although the response rate in 2017 was good, there were still some significant institutions that did not respond. In 2018, a response rate goal was set at 75%, which was surpassed with a response rate of 80%, with 187 institutions out of 234 responding. Many of the non-responders probably did not have any online or distance education programs for credit. However, there were some non-responders that were known from other sources to have strong online programs.

In 2017, we learned that different questions usually required responses from a number of people within the same institution. Thus, we also invested time in 2018 in improving our database of contacts at each institution, ensuring that the questionnaire went to the right people in each institution.

³ See: <https://onlinelearningsurveycanada.ca/> for the English reports and <https://formationenligneCanada.ca/> for the French report.

The 2017 results also highlighted the inconsistent and unreliable reporting of online course enrolments. The main reason for this was the variety of definitions being used across the country. In many cases there was a mismatch between the definitions in our questionnaire, and the way institutions collected their data. Many institutions did not track online enrolments separately or tracking was decentralized across the institution and different definitions were being used.

Indeed, each province uses its own method to collect data and count overall post-secondary student enrolments. Some count only full-time students, some count full-time equivalents that include a fraction for each part-time student, others count all part-time students the same as full-time students. Some provinces exclude international students (since most are self-funding) while others include them.

There are good reasons for each of these practices within each province, and institutions are set up to give priority to data requested by the provincial government in the format requested. However, it causes major problems when trying to produce consistent national data across provinces and territories.

Actions taken to address the issue for the 2018 survey included:

- considerable feedback from multiple sources on how to improve the definitions,
- work from the entire research team to draft a revised approach to definitions,
- feedback from key players in Canadian higher education on the re-drafted definitions,
- conduct a preliminary survey where institutions were asked about the 'new' definitions, and what data they could reliably report.

The result was a revised and clearer set of definitions that hopefully would match those used by the majority of institutions in the country. Also, the survey asked only for the enrolment data that most institutions told us they could reliably provide.

To obtain a deeper understanding of the unique context of francophone institutions, particularly in Québec, a consultant from Québec was added to the research team. A decision was also made to treat the francophone colleges within anglophone institutions as separate, independent entities with their own francophone questionnaire. Private subsidized colleges in Québec that receive funding from the provincial government were added to the 2018 roster, thus widening the base of institutions in Québec.

Obtain New Information

The scope of the survey was widened, to include questions on:

- how online, hybrid and digital learning were being defined within institutions,
- more detailed questions on open education/open educational resources,
- emerging technologies such as learning analytics, simulations, virtual reality and artificial intelligence,
- online learning /non-credit programming in preparation for a more detailed set of questions in 2019,
- a question about the perceived quality of online learning compared with conventional classroom teaching,
- the impact of benefits, and strategies to reduce barriers, to online learning.

Plans for the Future

The 2018 survey remains focused on online learning in provincially funded (public) institutions in Canada. However, we recognize that we will still need to include other areas that have not been covered, or not covered in depth, such as:

- digital learning in post-secondary institutions managed by First Nations;
- digital learning in non-credit programming;
- emerging pedagogies in digital learning;
- online learning in private post-secondary colleges;
- growth of digital learning;
- adoption of open educational practices;
- further exploration of the impact of benefits and solutions to minimize barriers.

To do this, we will need to reach out to more stakeholders in these areas, and find additional sources of funding, and these will be our priorities for 2019. This may also mean widening our research approach to include case studies and more qualitative research.

APPENDIX 1

METHODOLOGY AND RESPONSE RATE

The universe of interest for this study is all publicly funded post-secondary institutions in Canada.

Almost all universities in Canada are provincially funded. As a result of feedback from Québec following the 2017 survey, three Québec institutions that were previously treated as constituent components of the Université de Montréal were added as independent institutions. Also, in 2018 the scope was expanded to include federally funded post-secondary institutions, adding the Royal Canadian Military College (which has university status) to the 2018 roster.

A further change from 2017 was the decision to treat francophone colleges within anglophone universities as a separate roster entry, as they offer separate academic programs and require a separate questionnaire in French. This resulted in an additional five university-type institutions compared to those included in the 2017 survey. Finally, one provincially funded institution changed its status from a college to a university between 2017 and 2018.

As a result, there are 82 universities listed in the 2018 roster, compared to 72 in 2017.

Canadian private for-profit universities, most of which are very small, are not included in either the 2017 or the 2018 rosters. Likewise, private, not-for-profit universities in Canada, mainly religious-based universities with provincial legal status are not included. Fully private career colleges and institutes are also not included.

Québec's college system, although publicly funded, is fundamentally different from the rest of Canada. Although CÉGEPs (Collèges d'enseignement général et professionnel) provide both academic programs that prepare students for university as well as vocational programs, the CÉGEPs often offer a different mix of programs and age ranges than those found in colleges in other provinces.

Thus in 2017 a distinction was made between colleges (anglophone and francophone) outside Québec, and the CÉGEPs. In 2017 we included 50 CÉGEPs in our roster. Again, as a result of feedback from the 2017 study, we added two more fully funded provincial professional colleges to the 2018 CÉGEPs roster, and reduced two separate CÉGEP entities to one, as the distance education entity was part of the main institution, making a total of 51 for 2018.

Another difference from 2017 is the treatment of Québec private subsidized colleges, which are establishments recognized as a public interest and approved for subsidies by the Minister responsible for Higher Education' that are fully accredited within the province. Thus, for 2018 we added these 21 publicly subsidized colleges to the roster.

A number of aboriginal communities/First Nations also manage their own post-secondary technical colleges. In 2017 we included two First Nations' managed colleges in the roster, as they received provincial funding. There are several other colleges managed by First Nations with a

variety of funding arrangements. These colleges are usually small and on reserves. However, we feel that we need to reach out to First Nations to learn more about these colleges, how they are managed and their interest or otherwise in online learning, but for 2018 we have excluded any colleges or institutes managed by First Nations until we have a better understanding of their needs and interests. This is a priority for 2019.

By extending the scope to federally funded post-secondary institutions, we added the Canadian Coast Guard College to the 2018 roster. Also, a provincially funded specialist language college was added to the roster in 2018.

Thus the 2018 roster includes:

- 82 universities and Francophone colleges of Anglophone universities
- 80 colleges outside Québec
- 51 CÉGEPs
- 21 private subsidized colleges in Québec

The resulting roster includes 152 colleges and 82 universities for a total of 234 institutions, compared with 203 in 2017.

Questionnaire Design and Distribution

The 2017 questionnaire design was initially based on the design of the Babson Surveys, but was modified to meet the Canadian context. For comparison purposes several key questions remain common to both the Canadian and U.S. surveys.

For 2018, a number of questions in the 2017 survey where the information was not likely to change significantly from year to year were dropped. As noted elsewhere in this report, definitions were revised to reflect feedback received after the 2017 study and a question was added to allow institutions to compare their definitions with those of the survey team.

Questions on enrolments in the 2018 survey were also modified to take account of the new definitions and the feedback received from institutions regarding the 2017 study.

New sections specifically on open educational resources, continuing education courses, and a comparison of the perceived quality of online, blended and face-to-face courses were also added.

The most important changes to the 2018 survey (the definitions and the enrolment questions) were tested in a pre-survey that went to all potential participating institutions for feedback and comment. This outreach was also used to update the contact information for each institution.

A survey invitation was sent to the Provost/VP Academic or Vice-President Education or Directeur général at each institution, with copies to the other institutional contacts in our roster. The questionnaire content was identical in both anglophone and francophone versions of the questionnaire.

The questionnaire itself was online and was accessed using a link unique for each participant institution. Members of the project team actively followed up with institutions to encourage them to participate. The project was also promoted through post-secondary educational networks or provincial organizations. The invitations began in late June, 2018 and continued until the end of July. In response to requests from responding institutions in late summer, a pdf that allowed for responses to be entered was made available to requesting institutions, after which the majority of responses were submitted using the pdf. The eventual cut-off date for return of the questionnaire was set at August 31, although the survey team was able to accommodate additional responses on an exception basis after that date.

Comparing the Roster with Statistics Canada

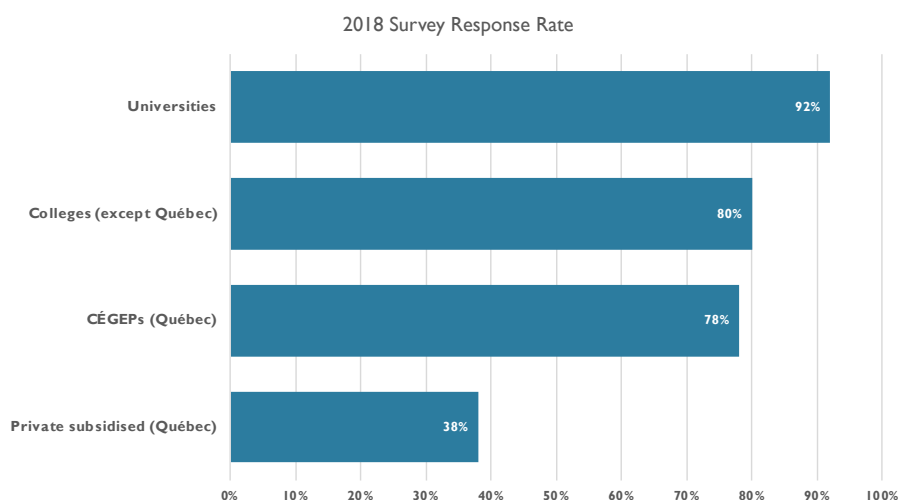
Statistics Canada (StatCan's) provides Canadian post-secondary student enrolments for the fall of the 2015/2016 academic year⁴. Comparing the population base of enrolment data from the questionnaires, supplemented where questionnaire data was missing or unreliable with estimates of an institution's enrolments, showed a high level of agreement with the number of students studying for institutional credit at Canadian public post-secondary institutions, as reported by StatCan for 2015-2016.

	Universities	Colleges/CÉGEPs/S-P	Total
Survey (2017)	1,309,185	763,183	2,072,368
StatCan (2015)	1,307,277	727,680	2,034,957
Difference	1,908	35,503	37,411
% difference	0.15%	4.88%	1.84%

Institutional Response Rates

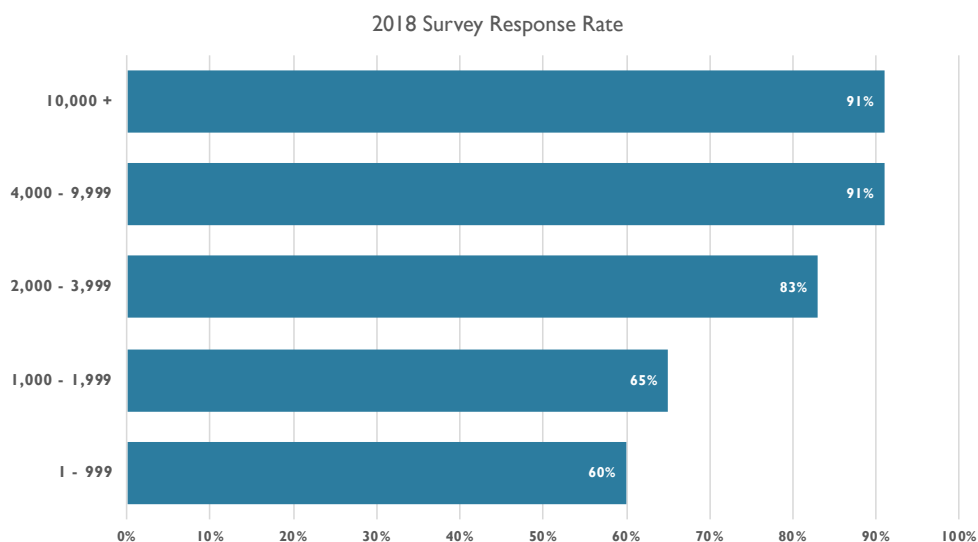
The overall institutional response rate was 80% for all types of institutions.

Responses were highest from universities (92%) and lowest from the 21 private subsidized colleges in Québec added to the roster this year (38%). If the 21 private subsidized colleges in



⁴ <https://www150.statcan.gc.ca/t1/tbl1/en/tv.action?pid=3710001101>

Québec are excluded, the response rate is 84%, compared with 69% for last year's similar roster base.



The response from francophone institutions was higher in 2018 than the 2017 survey (73% compared with 65% in 2017). Even though the low response rate from the newly added private subsidized colleges (38%) pulled the overall francophone average down to 73% for 2018, this is still higher than the 65% in 2017. Without the private, subsidized colleges, the francophone response rate was 83%, almost identical to the anglophone response rate of 85%.

The response rate tended to be lower from the smaller institutions, nevertheless, well over half of even the smallest institutions responded. Since there was a higher response from the larger institutions, the questionnaire responders represent institutions with 92% of the student population base.

Overall, especially considering that this was a voluntary questionnaire, the responses provide an excellent, representative sample of colleges and universities across all provinces, and across all sizes of institution, representing 80% of all institutions and 92% of all students studying for institutional credit at Canadian public post-secondary institutions.

APPENDIX 2

ROSTER OF COLLEGES AND UNIVERSITIES

Note: The institutions listed below were the population base for the survey in 2018. A total of 187 of 234 publicly funded institutions responded to the survey. **A total of 90 institutions in Québec were invited to respond and 66 did. In addition, 13 Francophone or Francophone affiliated institutions outside of Québec were included and 11 completed a French survey. Across Canada, there were 70 of 96 French language surveys completed and 117 of 138 English language surveys.**

Note: The institutions listed below informed the population base of institutions outside of Québec that were invited to participate in the survey. A total of 187 of 234 publicly funded institutions responded to the survey.

Universities

Québec

Bishop's University
Concordia University
École nationale d'administration publique
École Polytechnique de Montréal
École de technologie supérieure
HEC Montréal
Institut national de la recherche scientifique
McGill University
TÉLUQ
Université de Montréal
Université de Sherbrooke
Université du Québec à Chicoutimi
Université du Québec à Montréal
Université du Québec à Rimouski
Université du Québec à Trois-Rivières
Université du Québec en Abitibi-Témiscamingue
Université du Québec en Outaouais
Université Laval

Québec: CEGEPS

Cégep André-Laurendeau
Cégep Beauce-Appalaches
Cégep de Baie-Comeau
Cégep de Chicoutimi
Cégep de Drummondville
Cégep de Granby Haute-Yamaska
Cégep de Jonquière
Cégep de l'Abitibi-Témiscamingue
Cégep de l'Outaouais
Cégep de la Gaspésie et des Îles
Cégep de La Pocatière
Cégep de Lévis-Lauzon

Cégep de Matane
Cégep de Rimouski
Cégep de Rivière-du-Loup
Cégep de Saint-Félicien
Cégep de Saint-Hyacinthe
Cégep de Saint-Jean-sur-Richelieu
Cégep de Saint-Jérôme
Cégep de Saint-Laurent
Cégep de Sainte-Foy
Cégep de Sept-Îles
Cégep de Sorel-Tracy
Cégep de Sherbrooke
Cégep de Thetford
Cégep de Trois-Rivières
Cégep de Victoriaville
Cégep du Vieux Montréal
Cégep Édouard-Montpetit
Cégep Garneau
Cégep Heritage College
Cégep John Abbott College
Cégep Limoilou
Cégep Marie-Victorin
Cégep régional de Lanaudière
Cégep Vanier College
Cégep@distance

Champlain Regional College
Collège Ahuntsic
Collège d'Alma
Collège de Bois-de-Boulogne
Collège de Maisonneuve
College de Valleyfield
Collège Gérald-Godin
Collège Lionel-Groulx
Collège Montmorency
Collège Shawinigan
Dawson College
Institut de tourisme et d'hôtellerie du Québec
Centre Matapédien d'études collégiales
Institut de technologie agroalimentaire

Québec: Private subsidized colleges

Campus Notre-Dame-de-Foy
Collège André-Grasset
Collège Bart
Collège Centennial
Collège Ellis
Collège international des Marcellines
Collège international Marie de France
Collège Jean-de-Brébeuf
Collège Laflèche
Collège LaSalle
Collège Marianopolis
Collège Mérici
Collège O'Sullivan de Québec et Montréal
Collège Stanislas
Collège TAV
Collège Universel - Campus Gatineau
Collégial international Sainte-Anne
École de musique Vincent-d'Indy
École de sténographie judiciaire
École nationale de cirque
Séminaire de Sherbrooke

Universities: National

Alberta

Athabasca University
MacEwan University
Mount Royal University
University of Alberta
Campus Saint-Jean
University of Calgary
University of Lethbridge

British Columbia

Capilano University
Emily Carr University of Art + Design
Kwantlen Polytechnic University
Royal Roads University
Simon Fraser University
Thompson Rivers University
The University of British Columbia
University of Northern British Columbia
University of the Fraser Valley
University of Victoria
Vancouver Island University

New Brunswick

Mount Allison University
St. Thomas University
Université de Moncton
University of New Brunswick

Newfoundland

Memorial University of Newfoundland

Nova Scotia

Acadia University
Cape Breton University
Dalhousie University
Mount Saint Vincent University
NSCAD University
Saint Mary's University
St. Francis Xavier University
Université Sainte-Anne

Ontario

Algoma University

Brock University
Carleton University
Lakehead University
Laurentian University
Université de Hearst*
McMaster University
Nipissing University
OCAD University
Queen's University
Royal Military College of Canada
Ryerson University
Trent University
University of Guelph
University of Ontario Institute of Technology
University of Ottawa
University of Toronto
University of Waterloo
University of Windsor
Western University
Wilfrid Laurier University
York University

Prince Edward Island

University of Prince Edward Island

Colleges: National

Alberta

Alberta College of Art & Design
Bow Valley College
Grande Prairie Regional College
Keyano College
Lakeland College
Lethbridge College
Medicine Hat College
Norquest College
Northern Alberta Institute of Technology
Northern Lakes College
Olds College
Portage College
Red Deer College
SAIT Polytechnic

British Columbia

British Columbia Institute of Technology
Camosun College
Collège Éducacentre
College of New Caledonia
College of the Rockies
Douglas College
Justice Institute of British Columbia
Langara College

Nicola Valley Institute of Technology
North Island College
Northern Lights College
Northwest Community College
Okanagan College

Saskatchewan

University of Regina
University of Saskatchewan

Manitoba

Brandon University
Canadian Mennonite University
University College of the North
The University of Winnipeg
University of Manitoba
Université de Saint-Boniface

Selkirk College

Vancouver Community College

Manitoba

Assiniboine Community College
Manitoba Institute of Trades and Technology
Red River College

New Brunswick

Collège communautaire du Nouveau-Brunswick
Maritime College of Forest Technology
New Brunswick College of Craft + Design
New Brunswick Community College

Newfoundland

College of the North Atlantic

Nova Scotia

Nova Scotia Community College (NSCC)
Gaelic College
Nunavut
Nunavut Arctic College

Prince Edward Island

Collège de l'Île-du-prince-Édouard
Holland College

Saskatchewan

Carlton Trail College

Collège Mathieu - Saskatchewan

Cumberland College

Great Plains College

North West Regional College

Northlands College

Parkland College

Saskatchewan Polytechnic