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

ATLANTIC CANADA SUB-REPORT

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CANADIAN NATIONAL SURVEY
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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). 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.

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.

DEFINING ATLANTIC CANADA

This sub-report provides the results of the 2018 Canadian National Survey of Online and Distance Education, focusing on public post-secondary institutions in Newfoundland and Labrador, Prince Edward Island, Nova Scotia, and New Brunswick. Although Québec and Nunavut have Atlantic coastlines, the CDLRA included Nunavut in the grouping of institutions north of 56 degrees and created a separate sub-report specific to institutions in Québec.

The public report covering the whole of Canada is available at <https://www.onlinelearningsurvey.ca>. This sub-report is a condensed version of the public report, specific to Atlantic Canada.

Atlantic Canada is a small, but distinct region of Canada with a total of 24 institutions. Newfoundland and Labrador, Prince Edward Island, and New Brunswick have a collective total of 13 post-secondary institutions; however, Nova Scotia is distinct with 11 post-secondary institutions, the majority of which are universities.

In general, this sub-report will provide collective results from the region to avoid identifying specific institutions.

RESPONSE TO THE SURVEY

The 2018 survey received an 80% response rate from across the country, which represents 187 responses from our roster out of 243 institutions. Responses were highly representative of institution type, province, and size of institution. The responding institutions covered 92% of all students in post-secondary education in Canada. Non-responders tended to be smaller institutions.

The response rate from the 24 Atlantic Canada institutions (10% of all institutions in the roster) was 83% (20 institutions). All institutions in Newfoundland and Labrador and Prince Edward Island responded to the survey. In New Brunswick, 5 out of 8 institutions responded and 10 out of 11 institutions in Nova Scotia responded.

MAIN RESULTS

EXTENT OF INSTITUTIONAL PARTICIPATION IN DE AND ONLINE LEARNING

Online learning and distance education is prevalent in Canada with 85% of all Canadian universities and colleges offering distance education and 83% offering online courses for-credit in 2016-2017. In almost all cases, distance education is now synonymous in Canada with fully online learning.

In Canada, the average course load for students taking online courses was between 3 and 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.

Details of how these figures were calculated are given in the main public report; however, they take into account non-responding institutions and institutions without online or distance education courses. We are confident that these figures accurately represent the state of online learning in Canada in 2016-2017.

ONLINE COURSE ENROLMENTS

Canada

There are just over 2 million total students (2,072,368) enrolled across the 234 institutions in our roster, with a majority (1,309,185 or 63% of the total) studying at a Canadian university. The 2018 survey indicates that for the academic year 2016-2017:

- 17% of Canadian post-secondary students were taking at least one online course for credit. Similarly, in Atlantic Canada, 16% of post-secondary students (15,947 of 97,395 total students) were enrolled in at least one online course for credit. Within the Atlantic Canada provinces, 50% of students taking at least one online course for credit are from institutions in Newfoundland and Labrador (7982 students of the 15,947 students).
- Of all credit course enrolments in Canada, about 8% were fully online, representing 1.36 million online course registrations.

Atlantic region

A total of 16 institutions (11 universities and 5 colleges) in Atlantic Canada offer distance education/fully online courses for credit.

Looking at the Atlantic Canada region as a whole, we see the same proportion as the Canadian average: 8% of for-credit course enrolments being fully online (a total of 902,949 course registrations with 68,659 being online course registrations in the Atlantic region). When examining the provinces individually, the percentage of fully online course enrolments is lower than the national percentage for Prince Edward Island (4%), Nova Scotia (6%), and New Brunswick (3%); however, the percentage of fully online course enrolments for Newfoundland and Labrador is significantly higher than the Canada-wide percentage, at 19%.

TRENDS IN ONLINE ENROLMENTS

Canada

Almost two thirds of institutions in Canada reported 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). Three quarters of all Canadian post-secondary institutions anticipated increases in enrolments from 2016-2017 to 2017-2018.

Atlantic region

In Atlantic Canada, the results were consistent with the nationwide results. 70% of institutions reported growth in online course registrations compared to the previous year (39% reported modest growth and 31% reported fast growth). The remaining institutions reported a decline; however, the majority (23%) of institutions that reported a decline indicated that it was a modest decline (between 1-10%).

When asked how they expect the 2017-2018 online course registrations to compare to online course registrations for 2016-2017, all Atlantic provinces reported that they expect either the same number of online course registrations (21%) or growth (79%). The majority of institutions in the region (71%) reported that they expect modest growth in online course registrations (up between 1-10%) for 2017-2018.

BLENDED/HYBRID LEARNING

Canada

The 2018 survey responses indicate that all types of institutions are experimenting with blended/hybrid learning.

- Blended/hybrid course offerings constitute more than 10% of all course offerings in 22% of all post-secondary institutions in Canada
- Over 80% of universities, and over 80% of 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.

Atlantic region

18 institutions in Atlantic Canada responded to the question asking about the institution's current situation regarding courses for credit where some, but not all, of the face-to-face teaching has been replaced by online study. Of these responding institutions, 56% (10 institutions) indicated that they had a few courses (up to 10%) already in a blended/hybrid format. An additional 2 institutions reported that between 10-30% of courses were in a blended/hybrid format and 1 institution reported having more than 30% of courses in a blended/hybrid 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 only just over one in five have a significant number of courses in this format. In other words, blended/hybrid learning is wide but not deep.

THE USE OF TECHNOLOGY IN ONLINE AND BLENDED/HYBRID LEARNING

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.

All institutions in Atlantic Canada indicated that they extensively use LMS in online and blended courses.

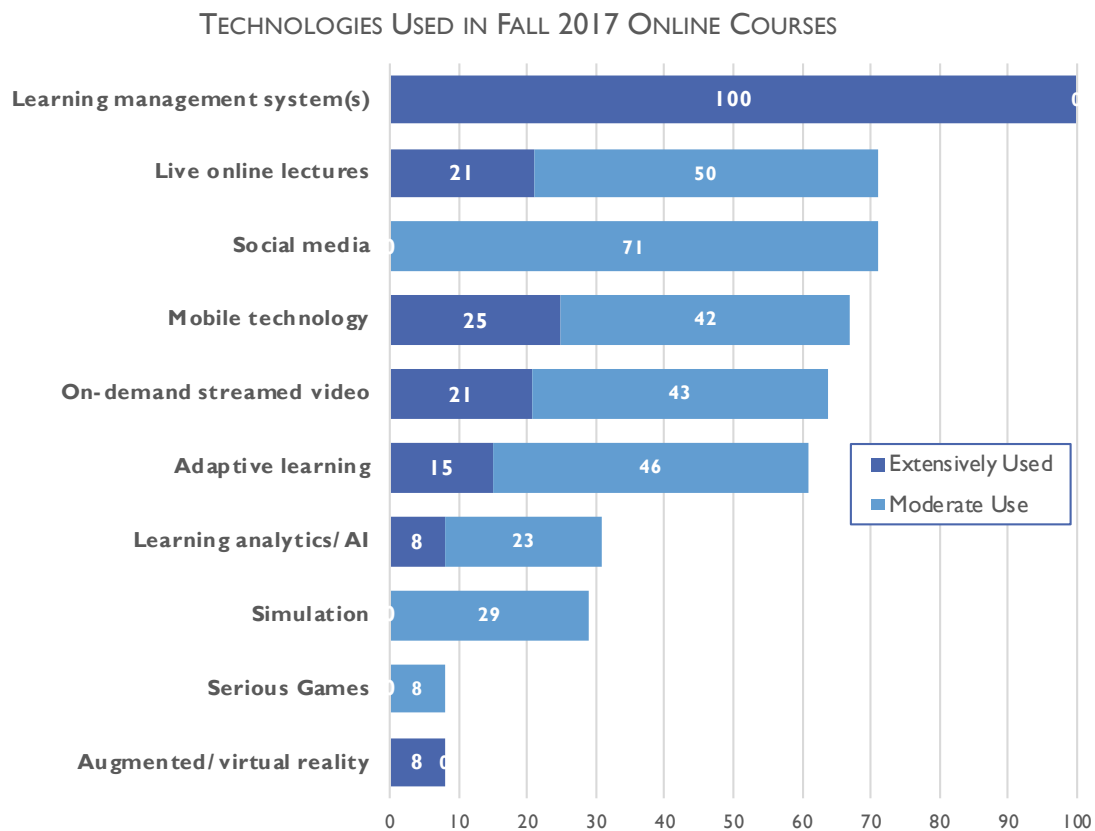


CHART A: Technologies used in online courses: Atlantic Region

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’. 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 learning, and blended/hybrid learning), a majority of institutions indicated that their institution definitions match.

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

Canada

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.

Atlantic region

Of the 19 institutions in Atlantic Canada that responded to the question about the definition of distance education, the majority of respondents (63%) indicated that their definition of distance education matched the survey definition. Only 1 institution had a definition that did not match the survey definition, 2 institutions had no definition, and 4 institutions indicated that they had more than one definition.

Online learning: 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.

Canada

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.

Atlantic region

Similarly, the majority of respondents from institutions in Atlantic Canada (63% of 19 institutions that responded to the question) used the same definition for online learning as the one provided. For the minority that did not use the same definition: 4 had definitions that did not match, 1 institution had no definition, and 2 institutions had more than one definition.

Blended/hybrid learning: 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.

Canada

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 form of teaching being the most recent.

Atlantic region

Again, the responses from the institutions in Atlantic Canada that responded to this question (20 institutions), reflect the nationwide response with 55% of institutions agreeing with the blended/hybrid definition. 30% of institutions in the region did not have a definition for blended/hybrid learning.

OPEN EDUCATIONAL RESOURCES

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%).

In Atlantic Canada less than half (39%) of post-secondary institutions are using open textbooks and an additional 22% of institutions are exploring their use.

MOOCs

Canada

There is no MOOC mania in Canada. Only a few post-secondary institutions in Canada (18%) offered MOOCs in the previous 12 months. 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%).

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.

Atlantic Region

Within Atlantic Canada, the majority of institutions (84%) had not offered MOOCs over the previous 12 months. Of the institutions that had offered MOOCs (16%), all reported that they offered between 1-5 MOOCs

Institutions in Atlantic Canada indicated less uncertainty will regard to future plans for MOOCs: 44% of institutions reported no interest in offering MOOCs, 12% reported that individual faculty could choose to offer MOOCs but without institutional support, and 25% of institutions indicated uncertainty. The remaining minority (19%) indicated a willingness to support the increased use of MOOCs in the future.

STRATEGIES AND PLANS

Canada

Online learning is very or extremely important for the institution's long-term strategic or academic plan in 68% of responding institutions across Canada. Less than 12% of all responding institutions reported that it was slightly or not at all important.

Across Canada, most responding institutions either had or were developing 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.

Very small institutions (fewer than 1000 students) were most likely to report that they did not need a strategy.

Atlantic region

Similarly, 68% of responding institutions in Atlantic Canada reported that online learning was very or extremely important to their institution's long-term strategic or academic plan. 16% indicated that it was slightly or not at all important.

Within Atlantic Canada, a lower percentage of responding institutions (52%) reported that they either had a plan or were developing one for e-learning. 37% of institutions indicated that they did not have a plan but they needed one and 11% of institutions reported that a plan for e-learning was not necessary.

REASONS FOR IMPLEMENTING ONLINE LEARNING

Institutions were asked about the reasons why they considered online learning strategically important.

Canada-wide, the most important reason given 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%). In Atlantic Canada, 100% of institutions rated increasing student access as important (20%) or very important (80%).

Closely linked in second-place across the country 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 Atlantic Canada region where 93% of the institutions rated this as important or very important.

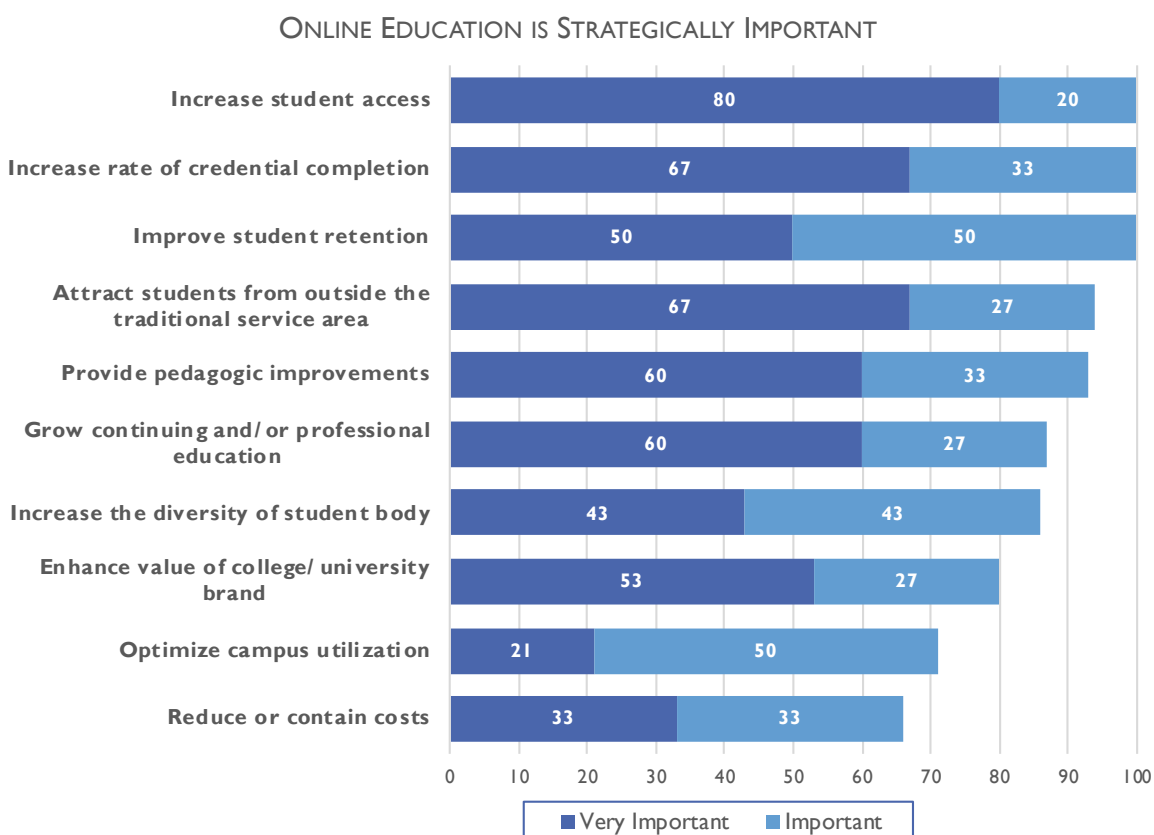


Chart B: Why online education is strategically important: Atlantic Region

BARRIERS TO THE ADOPTION OF ONLINE LEARNING

Institutions were asked about the barriers to online learning (Chart C below).

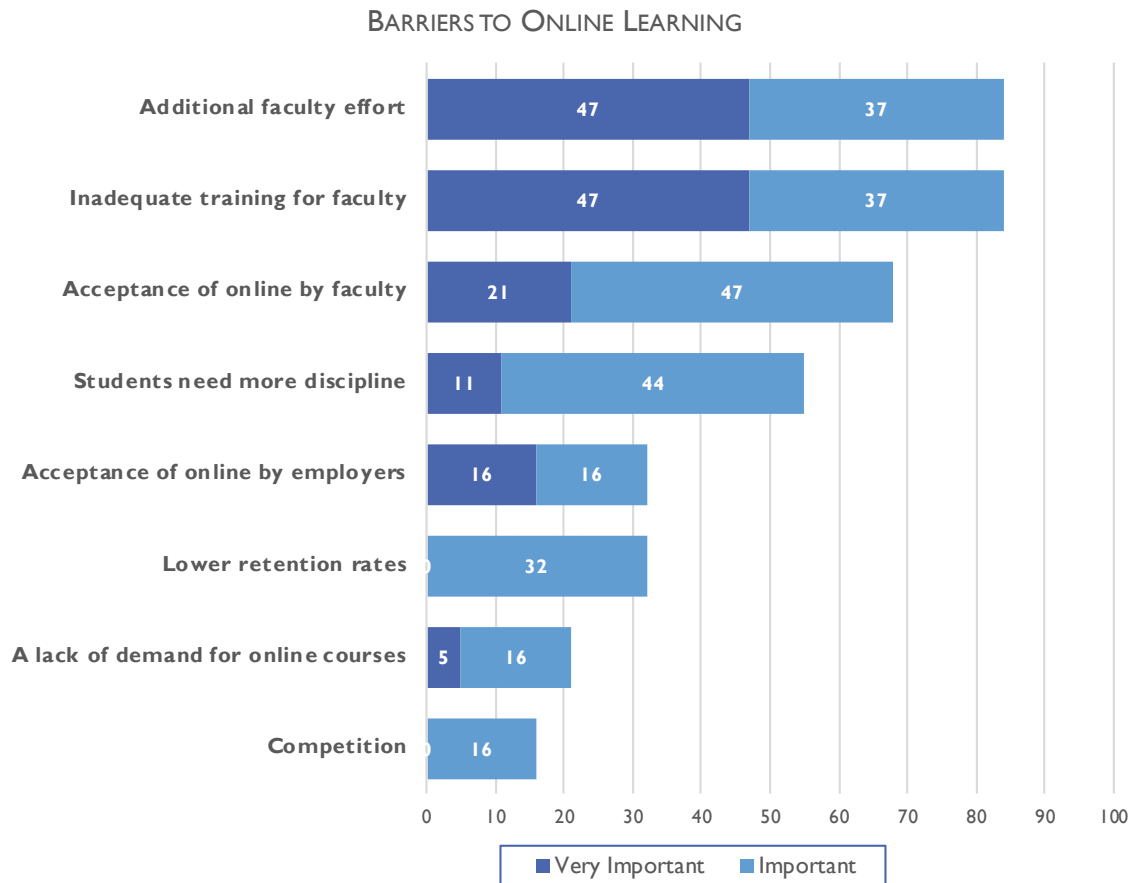


Chart C: Barriers to online learning: Atlantic Region

Institutions across Canada 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, including those in Atlantic Canada.

This was followed closely by inadequate training/pedagogical knowledge available for faculty in online learning, rated important or very important by 73% of institutions. This was even more pronounced in Atlantic Canada, where 84% of the institutions reported this as an important or very important barrier.

Nationwide, the third most significant barrier was lack of acceptance of online instruction by faculty (62% of institutions Canada-wide,) and in Atlantic Canada, the percentage rises slightly with 68% of institutions rating this as an important or very important barrier.

INSTITUTIONAL PERCEPTIONS OF ONLINE LEARNING

Canada

Canadian public post-secondary institutions generally hold positive views of 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 and/or 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.

Atlantic region

Institutions in the Atlantic region were less likely to report positive views of online learning, compared to the rest of the country:

- 42% of institutions reported that faculty accept the value and legitimacy of online learning
- The majority of institutions (53%) reported that online credentials are as respected as face-to-face credentials.
- The percentage of institutions that reported that students were at least as satisfied with online courses as with face-to-face courses was lower in the Atlantic region (47%) when compared to the overall response for Canada (61%).

- Although most institutions reported that online course learning outcomes were the same as face-to-face learning outcomes (63%) or somewhat superior to face-to-face outcomes (16%), a greater percentage of institutions reported that online learning outcomes were inferior (16%).
- Only 6% of institutions in the Atlantic region reported that learning outcomes were inferior in blended/hybrid courses and the majority (71%) reported that learning outcomes in blended/hybrid courses were the same as face-to-face courses. 24% of institutions reported that learning outcomes were superior in blended/hybrid courses.

CANADA AND U.S. 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 (17 per cent).

The policy and practice portions of the 2018 Canadian survey was administered 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.

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. The main differences are as follows:

- While Canadian academic leaders are slightly more likely to believe that online learning has a high degree of importance for their institution, leaders in the U.S. appear to be further along in actually implementing their strategic plan incorporating "e-learning, hybrid learning and/or online learning."
- 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
- 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).
- U.S. leaders are more likely to believe that students need more discipline to succeed in an online course (65% compared to 52% for Canadian leaders).
- U.S. leaders are more likely to believe that retaining students in online courses is harder (43% for the U.S., 25% for Canada).

- There is a big difference in 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.

More details can be found in the public report.

CONCLUSIONS

Overall, the Atlantic region was fairly close to the national average on most issues, including the growth in online enrolments, the percentage of students taking online courses for credit, and the percentage of fully online course enrolments. As a whole, the region was comparable; however, we found significant differences between the Atlantic provinces in online course enrolments with Newfoundland and Labrador having a much higher percentage and the other provinces a significantly lower percentage than national average. We also found that the Atlantic region has significantly less activity in open educational resources and open textbooks than the rest of the country.

In terms of placing importance on online learning for their future, the results from institutions in the Atlantic region were similar to the Canada-wide results. The importance of online learning for accessing students from out of province was particularly strong for institutions in the Atlantic region, compared to the rest of the country. A higher percentage of institutions in Atlantic Canada reported that students were at least as satisfied with online courses compared to face-to-face offerings.

THE NEED FOR BETTER FACULTY DEVELOPMENT AND TRAINING

Although institutions in the Atlantic provinces reported that online learning was important for their future, they were less likely to have a plan or to be developing one. Further, a lack of training and pedagogical knowledge in online learning for faculty was even more pronounced in Atlantic Canada than in the rest of the country, as was lack of acceptance of online learning by faculty. Consistent with the national results, institutions in the Atlantic region reported that the most significant barrier to the adoption of online learning was the additional faculty effort required to develop and deliver online courses.