

Tracking Online Education in Canadian Universities and Colleges:

National Survey of Online and Digital Learning

2019 Québec Report

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We also thank the following organizations for their support: Colleges and Institutes Canada (CICAN) and Universities Canada.

Most importantly, we thank our responding institutions. We recognize that the completion of this survey is voluntary. As in 2017 and 2018, this year's survey required a collaborative effort from many different people within the institutions to provide all the information requested. We are truly indebted to everyone who participated in the survey. One of the main aims of conducting this research is to ensure our work adds value to our responding institutions.

We thank Carole Freynet-Gagné for her translation services that enabled the bilingual production of the 2019 CDLRA/ACRFL reports and presentations. We also thank Joanna Bossert for her graphic design services that supported the production of the 2019 CDLRA/ACRFL reports and presentations.



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EXECUTIVE SUMMARY

All public reports on the results of the *2019 Canadian National Survey of Online and Digital Learning*, which was conducted throughout the spring and summer of 2019, are available at <https://onlinelearningsurveycanada.ca/>.

The sub-report on Québec includes the national results from across the country and focuses on the responses from Québec's post-secondary institutions. Québec-specific results are presented under each key area of focus for the survey and are contextualized by the National results.

The 2019 questions are similar to those asked in previous surveys. Many responding institutions have shared that the questions asked in the National Survey have contributed to their improved tracking of participation in online and digital learning. The 2019 survey results for online offerings are representative of our entire roster of institutions and provide the most accurate count of institutions with online offerings to-date; however, many institutions still struggle to provide data specific to their online enrolment activities.

The 2019 survey received a 70% response rate from across the country, which represents 164 responses out of our roster of 234 public institutions. Responses were highly representative of institution type, province and size of the institution.

In Québec, 17 universities, 37 CEGEPS, and 8 private subsidized colleges (62 institutions) completed the survey, resulting in a 69% response rate. In the 2019 report, there are instances where a lower proportion of institutions reported engaging in aspects of online learning or technology use when compared with the 2018 results.

Lower proportions are not necessarily due to a decrease in engagement with online learning or technology use in Québec from 2018 to 2019. Rather, more institutions without online offerings, or who are in the early stages of developing online offerings, responded to the survey in 2019. The CDLRA is appreciative of institutions within Québec that responded to the survey for the first time in 2019, additional responses facilitated a richer understanding of the state of digital learning in the province.



FRANCOPHONE INSTITUTIONS OUTSIDE QUÉBEC

The 2019 roster for the survey also included 14 institutions which offer programs in the French language, located outside the province of Québec. Roughly half of these institutions responded to questions in the survey, which limited our ability to provide an accurate comparative analysis of Francophone institutions within Québec and outside of Québec. Where applicable, this Québec report includes a call out box with snapshots of information about these Francophone institutions outside the province.





Key findings:

The majority of institutions in Québec expect online enrolments to increase over the next year.

A greater proportion of online students enrolled at institutions in Québec reside within the province than is the pattern for the rest of the country.

A higher proportion of institutions within Québec reported having blended/hybrid offerings and that they expect growth in blended/hybrid offerings compared to the national average.

Most institutions in Québec reported that online learning is very or extremely important to their long-term plans. The open-ended comments revealed that institutions consider online learning to be important for maintaining adequate enrolment numbers and to better meet the personal needs of students.

A higher proportion of institutions in Québec require professional development for faculty teaching online compared to the national average.

Open Educational Resource use in Québec is lower than the national average, and fewer institutions perceive the cost of materials to be a barrier for students.





INTRODUCTION

The 2019 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.

This report represents the third annual study on tracking online and digital learning among publicly-funded, post-secondary institutions in Canada. The survey universe consists of all Canadian publicly-funded, post-secondary institutions. In 2019, a total of 234 institutions comprised the roster and included CEGEPs, colleges (including polytechnic institutions), private but publicly subsidized colleges in Québec, and universities. The 2019 survey had a response rate of 70% (164 of 234 institutions) with the responding institutions representing 90% of all students taking for-credit courses and 95% of all online enrolments in Canada.

Before the launch of the 2019 survey, institutions received a preliminary survey, which guided the development of new topics for inclusion in the survey. Several potential questions regarding enrolments were dropped as a result of this preliminary survey, while new questions on alternative credentials and online course registrations by level and location of study were added to the survey for 2019.

The criteria for inclusion in this survey is that the institution is a publicly-funded post-secondary institution in a province or territory of Canada. This includes universities, colleges, polytechnics, CEGEPs and private subsidized colleges in Québec.

This Québec sub-report offers insight and specific reference to the results provided by Québec's universities, CEGEPS, and private subsidized colleges to the *2019 National Survey on Online and Digital Learning* of Canada's post-secondary institutions.



LIMITATIONS TO THE REGIONAL REPORTS

Regional reports are designed to be a single-year comparison to the national data. The purpose of these reports is to provide information about the distribution of the results from the National Report and to gain a richer understanding of the diversity associated with the growth and development of digital learning within Canada.

In the National Report, year-to-year comparisons of results are provided, where appropriate. Our position is that these comparisons are made possible due to the high response rate recorded at the national level. Based on our experience, if a small number of institutions report notable changes from previous years in their responses, the impact on the national level results is minimal.

For the regional results, however, the number of responding institutions is naturally much lower and varies considerably from region-to-region. For this reason, we purposely limit regional year-to-year comparisons or region-to-region comparisons. At the regional level, differences in the number of responding institutions within the region or variability in reported data from only a few institutions can substantially impact the magnitude of change in the reported proportions.

Our intent is to provide special reports as the survey matures to highlight important changes over time at the regional level. As data collection and reporting at the institutional level improves, we anticipate increased accuracy which will better facilitate such analyses.

If you would like to discuss the results from each year, the CDLRA/ACRFL invites you to contact us at tdonovan@onlinelearningsurvey.ca

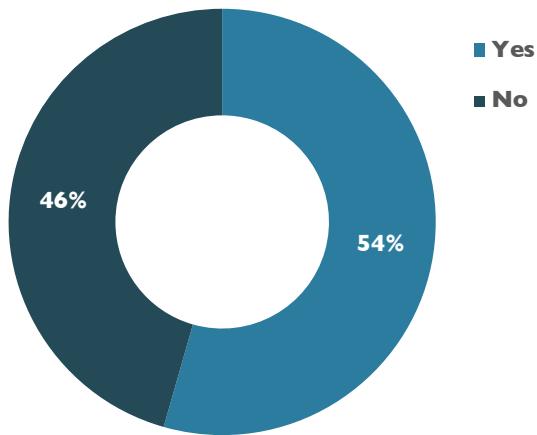
ONLINE ENROLMENT DATA

Online learning is growing within Québec and is widespread in universities throughout the province.

Online learning is the primary delivery modality of distance education and is pervasive in universities and colleges across Canada. The 2019 survey measured the proportion of institutions that offer online courses for credit.

At the national level, of the 234 publicly-funded institutions included in our roster, 76% offer some form of online learning, and 24% do not. In Québec, 54% of institutions offer online courses for credit.

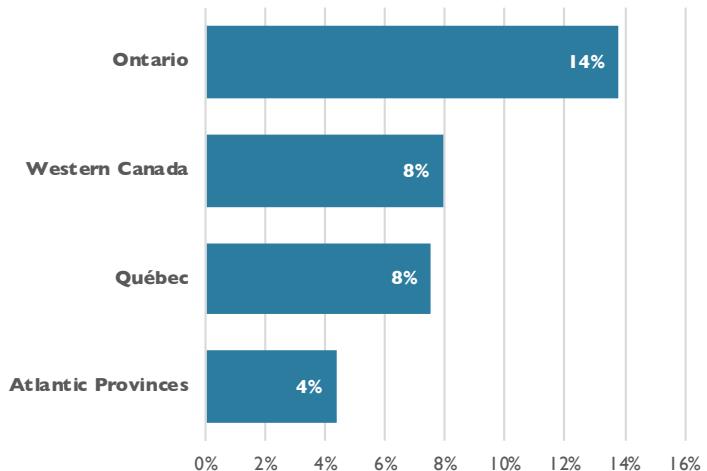
QUÉBEC: FOR-CREDIT ONLINE COURSE OFFERINGS



Nationally, online course registrations grew by around 10% between 2016-17 to 2017-18. This result, based on online course registration data among institutions who reported in both survey years, is broad-based with gains seen in all regions of the country, among all sizes of institutions, and among all types of institutions.

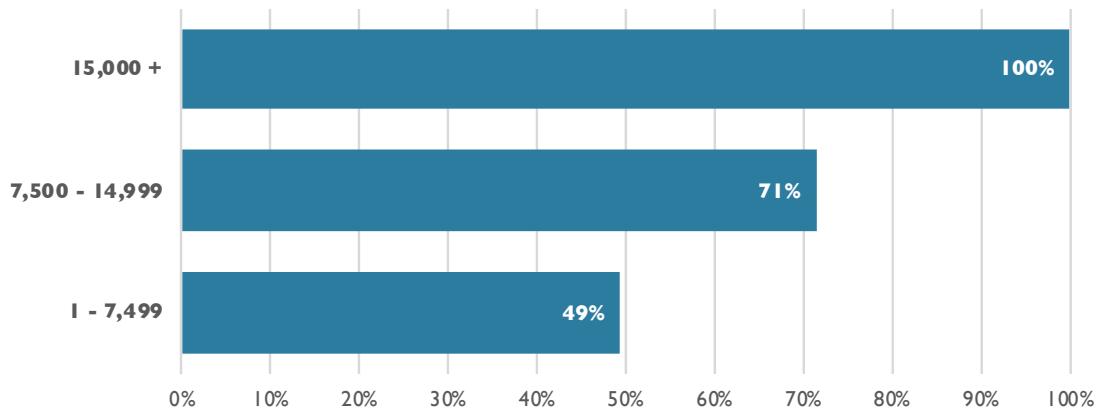
Québec institutions experienced a slightly lower rate of growth in online course registrations when compared to the national average, with an 8% increase between 2016-17 to 2017-18.

CHANGE IN ONLINE COURSE
REGISTRATIONS FROM 2016-17 TO 2017-18



Institution size is a factor in whether online courses are offered at institutions in Québec: all institutions with more than 15,000 enrolments offered online courses for credit, as did 71% of institutions with enrolments between 7,500 and 14,999. Of the institutions with less than 7,500 enrolments, roughly half had online offerings.

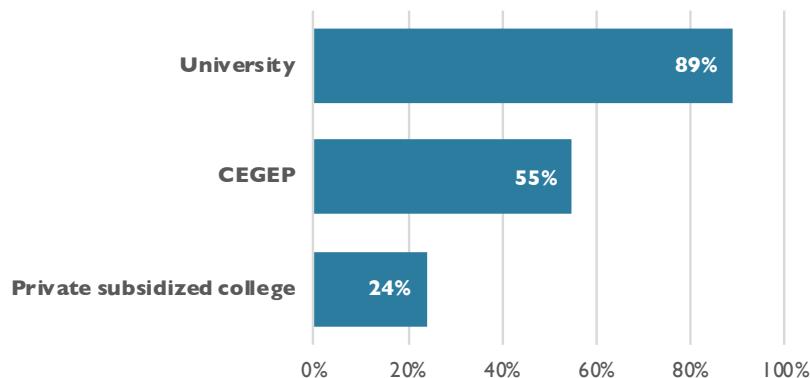
QUÉBEC: FOR-CREDIT ONLINE COURSE OFFERINGS: INSTITUTION SIZE



A substantial majority of universities within Québec (89%) and a slight majority of CEGEPS (55%) offer online courses for credit. Private subsidized colleges are least likely to offer online courses.



QUÉBEC: FOR-CREDIT ONLINE COURSE OFFERINGS:
INSTITUTION TYPE



These growth estimates use information from the 2018 and 2019 survey on 'total student course registrations in online courses.' There are several caveats to keep in mind when examining these results. The first is that collecting consistent student enrolment and registration data is far from easy, depending on institutional decisions on coverage by credit status, full- or part-time, which divisions of the institutions to include, etc. The assumption being made here is, whatever processes the institution has chosen to apply, it remained consistent between the two years.

A further consideration is that the estimate does not reflect the totality of all Canadian higher education. At a national level, only 43% of institutions provided reliable data for both years.

In Québec, 22 of 90 (24%) institutions provided reliable data for both years. Those reporting course enrolment data tended to be the larger institutions, and together they represented 41% of all Québec enrolments.

FRANCOPHONE INSTITUTIONS OUTSIDE QUÉBEC

All francophone institutions outside Québec have for-credit online offerings.

ONLINE COURSE REGISTRATION BY LOCATION

The vast majority of online students attending institutions in Québec reside within the province.

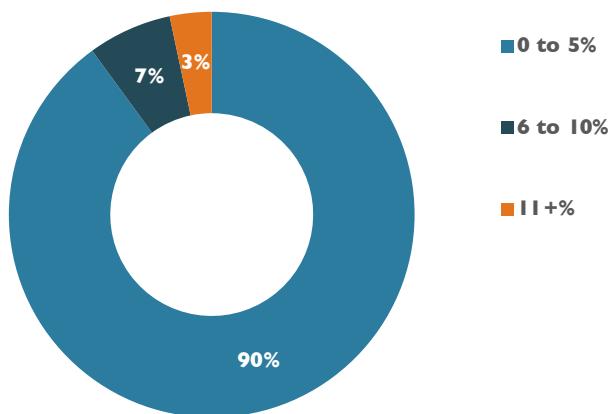
Institutions were asked to provide the proportion of their online students that resided within the same province as the institution, as well as the proportion of online students from outside of the province.

Nationally, over one-third of institutions with online courses do not track this information and were unable to provide a response. A second group did not have exact data but were able to provide estimates, leaving only 39% of institutions with online offerings reporting that they tracked this data and were able to provide reliable numbers. At the provincial level, 24% of Québec institutions with online offerings did not track the proportion of online students that resided within the province.

At the national level, the majority of institutions (52%) reported that less than 5% of their online students resided outside the province, and few institutions (18%) reported that 21% or more of their online students resided outside the province.

In Québec, the tendency of online students to take online courses within their own province is more pronounced. Very few online students attending institutions within Québec reside outside the province: the vast majority (90%) of institutions that track online course offerings by location reported that 0-5% of online students were from outside the province. Only 10% of institutions reported that more than 5% of their online students were from out of province.

QUÉBEC: PROPORTION OF ONLINE STUDENTS FROM OUTSIDE OF PROVINCE



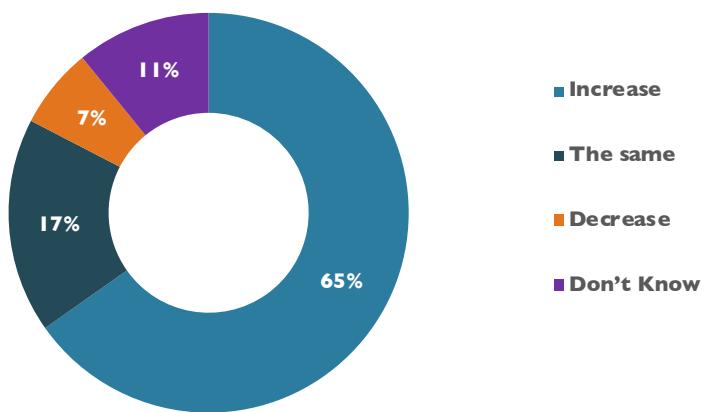
EXPECTATIONS FOR ONLINE ENROLMENT

The majority of institutions in Québec expect online enrolments to increase or stay the same in the coming year.

At the national level, the majority of institutions (71%) expected online enrolments to increase, and only 7 institutions expected a decrease. A further 17% of institutions expected online enrolments to stay the same.

In Québec, a slightly lower proportion of institutions expected online enrolments to increase (65%); however, the proportion of institutions that expected online enrolments to stay the same (17%) or decrease (7%) matched the national average.

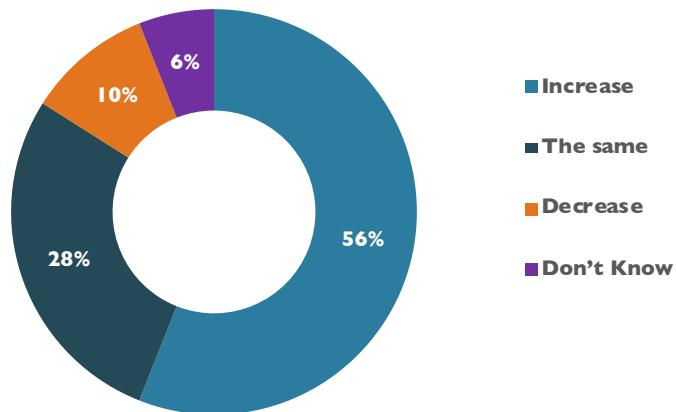
QUÉBEC: EXPECTED CHANGE IN ONLINE ENROLMENTS FOR NEXT YEAR



The survey also asked institutions to predict the change in total for-credit enrolments (the sum of their online and in-person courses) for the next year and, across Canada, fewer institutions (63%) predicted growth in their total enrolments compared to their online growth expectations.

When considering overall for-credit enrolments, the proportion of institutions (56%) within Québec that predicted growth in their total enrolments was slightly lower than the national average.

QUÉBEC: EXPECTED CHANGE IN TOTAL ENROLMENTS FOR NEXT YEAR

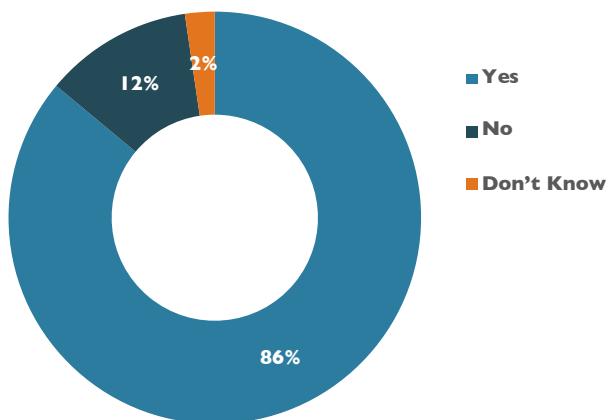


BLENDED/HYBRID COURSES

Blended/hybrid offerings are widespread within Québec institutions.

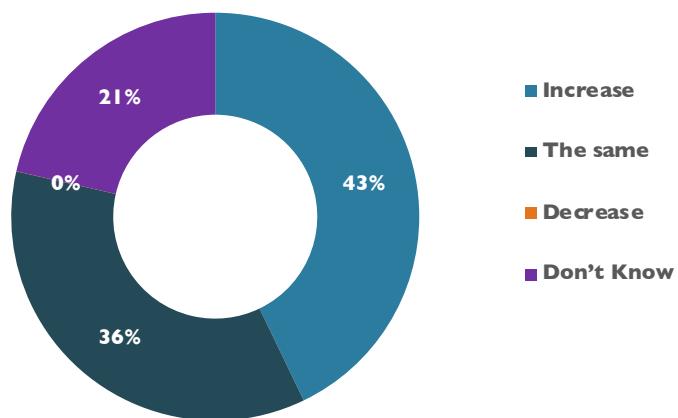
A greater proportion of Québec institutions (86%) reported offering blended/hybrid courses when compared to the national average (76%).

QUÉBEC: BLENDED OR HYBRID COURSE OFFERINGS



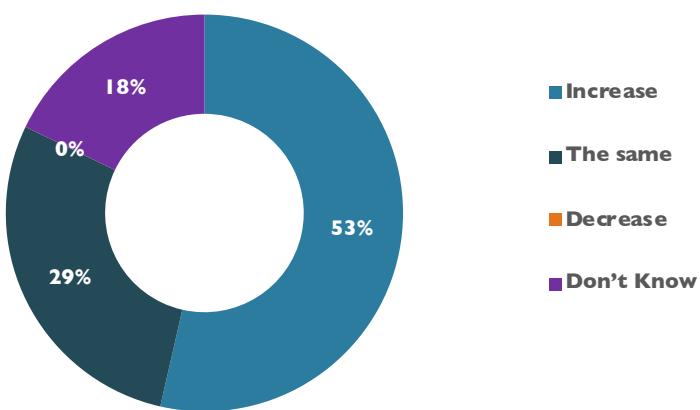
Change in enrolments from the previous year: Nationwide, 40% of institutions reported an increase in blended/hybrid enrolments and 35% reported they had the same number of blended/hybrid enrolments compared to the previous year. Slightly more institutions in Québec (43%) reported an increase in blended/hybrid enrolments from the previous year and roughly the same number of institutions (36%) reported that blended/hybrid enrolments had stayed the same.

QUÉBEC: CHANGE IN BLENDED ENROLMENTS FROM LAST YEAR



Predicting change for next year: At the national level, when predicting change in blended/hybrid enrolments for next year, the majority of institutions (78%) expected an increase (49%) in blended/hybrid enrolments or expected their numbers to stay the same (29%). A greater majority of Québec institutions (82%) expect that blended/hybrid enrolments will either increase (53%) or stay the same (29%). No institutions within Québec expect a decrease in blended/hybrid enrolments.

QUÉBEC: EXPECTED CHANGE IN BLENDED ENROLMENTS FOR NEXT YEAR



The open-ended comments provided by Québec institutions offered additional insight into the blended/hybrid learning landscape in the province. Specifically, institutions commented that offering blended/hybrid courses enabled students to receive the benefits of both face-to-face learning and online learning.

This is the heart of developments in FAD in our establishment. Hybrid courses seem to bring the best of both worlds (the autonomy of the asynchronous and synchronous teacher) and agree on a larger proportion of students, including mature students or those with many time constraints. (CEGEP)

A continuous training, blended learning can meet a need for reconciliation studies-family-work for customers. (CEGEP)

The growth of hybrid formation is not done at the expense of distance education. The hybrid training to replace the purely-face training by seeking the best of both worlds ("knowledge" online and "knowledge / skills" class). (Large University)



ALTERNATIVE CREDENTIALS

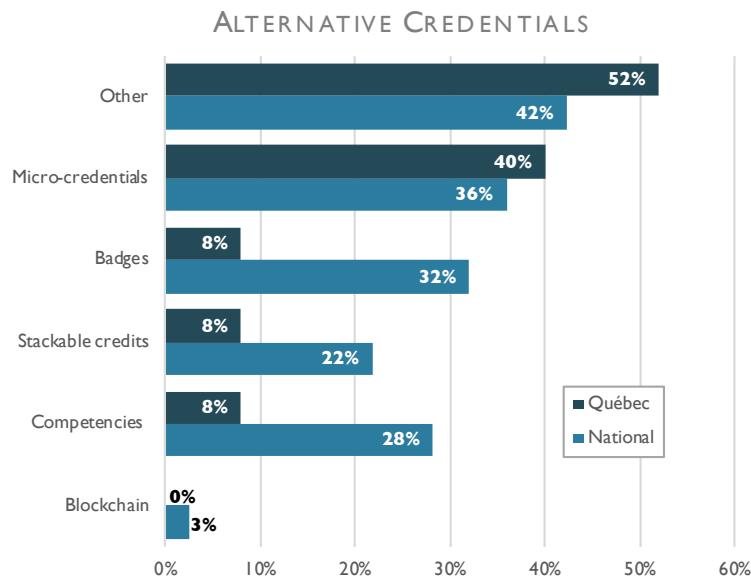
Overall, alternative credentials are being offered by a slight majority of institutions in Québec.

New to the 2019 survey were questions on alternative credentials such as micro-credentials, stackable credits, badges, blockchain, and competencies (from competency-based learning). Essentially, alternative credentials are offerings beyond traditional degrees, diplomas, and certificates. As institutions continue to develop and implement alternative credentials, it will be increasingly important to develop shared operational definitions to support institutions in classifying and tracking such offerings.

Nationwide, of the institutions that responded to whether they offer alternative credentials, nearly one-half are experimenting with these offerings.

At the national level, there appeared to be some ambiguity as to what qualified as an alternative credential, with many institutions reporting that they offered an ‘other’ alternative credential. In Québec, a higher proportion (52%) of responding institutions reported that they offered some ‘other’ alternative credentials compared to the national results (42%).

A large minority (40%) of institutions in Québec also reported offering micro-credentials. Less than 10% of institutions reported offering badges, stackable credits or competencies.





In the open-ended comments, some Québec institutions shared the types of alternative credentials offered at Québec institutions:

We will be bringing in a stackable degree credit system in the coming academic year. (Large University)

Training: Credit courses outside programs. Micro certificate college courses. (CEGEP)

Recognition of Acquired Competencies (RAC) (CEGEP)

Certificate of participation in a non-credit training (CEGEP)

Success Certifications (customized training, MOOC) (Large University)

Nanoprogrammes are being developed for a first release. (Large University)

Customized training to continuing education (Private Subsidized College)

Other comments by institutions within Québec suggested that alternative credentials are becoming important for workforce learning outside of formal education.

The granting other types of certificates is discussed. The rate of college graduation is stagnant in Québec, are there other ways to qualify students with college skills? Other certificates that graduates could have a beneficial effect on the students but also the recognition of college skills in the labor market, with employers. (CEGEP)

Digital badges are widely used in services to business (not credited). (CEGEP)

We are thinking of ways to develop programs that meet short credited for ad hoc training needs in addition to a degree program or training. (Large University)

We offer a certified training for professional associations of members for which we issue certificates of participation. (Large University)



TECHNOLOGIES

A higher proportion of Québec institutions reported using on-demand streamed video lectures compared to the national-level results.

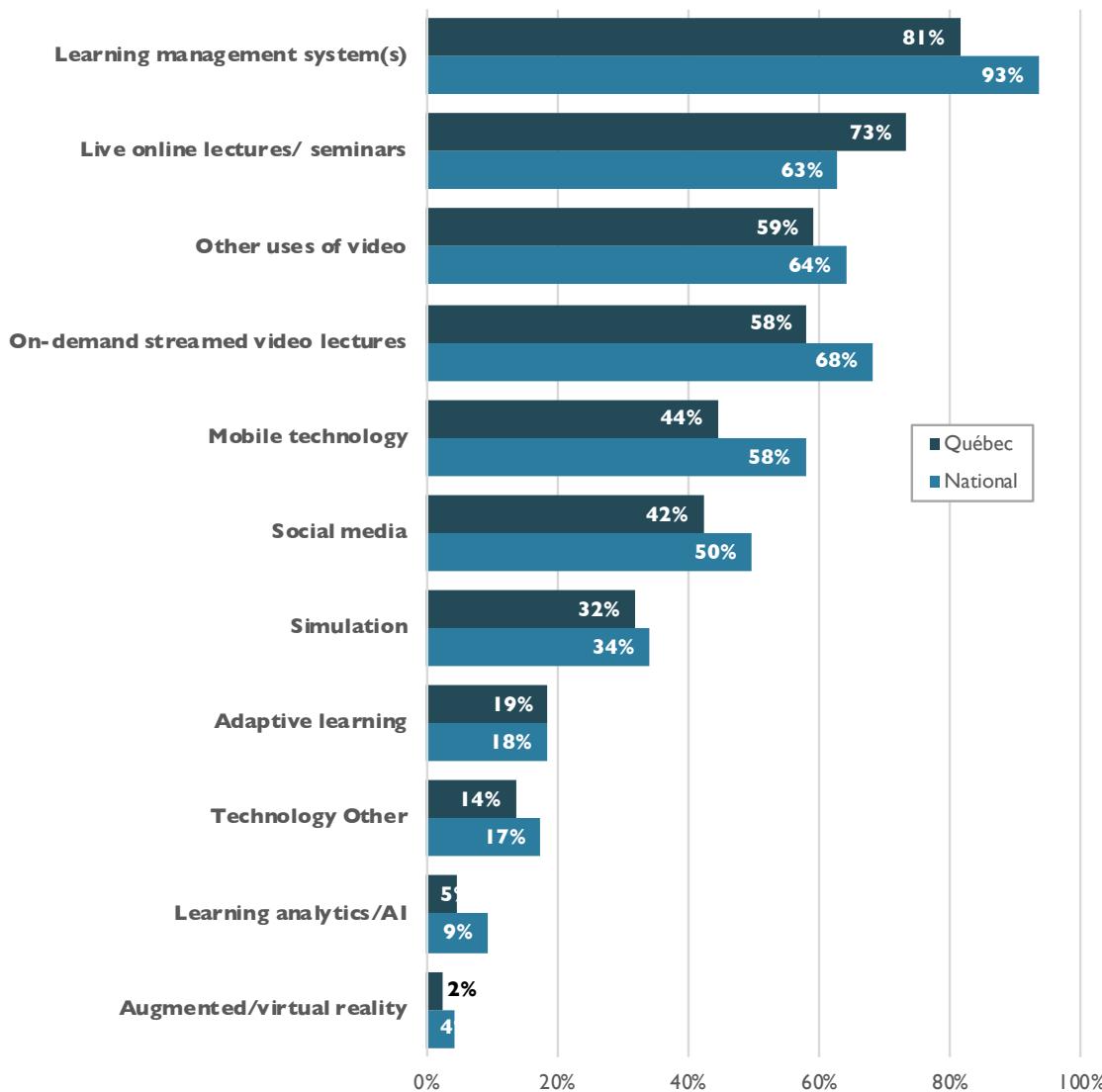
The survey provided a list of technologies and asked institutions to report the level of use, if any, of technologies used for teaching and learning at their institution. The results indicate that the responding institutions use a wide range of the listed technologies.

Nationwide, Learning Management Systems (LMS) are the primary technology that is extensively used by institutions in their online courses.

In Québec, fewer institutions (81%) reported using LMS technology compared to the national average; however, this is related to the lower proportion of institutions in Québec (54%) that have online offerings compared to the national average (76%). Among Québec institutions that responded in both 2018 and 2019, the majority reported the same level of LMS use for both years. Institutions that reported a change in the level of LMS use overwhelmingly reported a greater level of use in 2019 than in 2018.

The Québec results are also reflective of the national results concerning the use of other technologies. Compared to the national results, a greater proportion of Québec institutions reported using on-demand streamed video lectures (73%), and a similar proportion (19%) used adaptive learning. For all other technologies, the proportion of institutions that used the technology was slightly lower than the national average.

TECHNOLOGIES USED IN ONLINE COURSES





The open-ended responses from Québec institutions related to technology use described the exploration of new technologies.

The development of hybrid and especially during classes where technical skills are required leads us to open our minds to different ways of doing labs, field trips, etc. So we remain open and proactive in analyzing the potential of augmented reality, virtual reality, etc. Also, we believe that we will soon be before the adaptive learning projects to better meet the needs of a diverse student population. (CEGEP)

We will put in place an expert group in artificial intelligence and robotics. We also have a related consultation group with the digital action plan of the college. The college community (employees and students of all levels) was consulted to fully understand their needs. co-creation sessions were organized. The task of an educational consultant ADF was increased to 100%. She is responsible for the support, development as well as training and technical support in ADF continuing education and business services. (CEGEP)

In the coming months, some courses will be offered with virtual reality servings for several programs. (CEGEP)

3D printing environment in mechanical engineering, greater use of iPads, phones, videos as part of the strategy of the flipped classroom, augmented reality, high-fidelity mannequins in healthcare. (CEGEP)

We are actively working on introducing simulations, XR and learner analytics into our online courses in the next couple of years. (Large University)

OPEN EDUCATIONAL RESOURCES

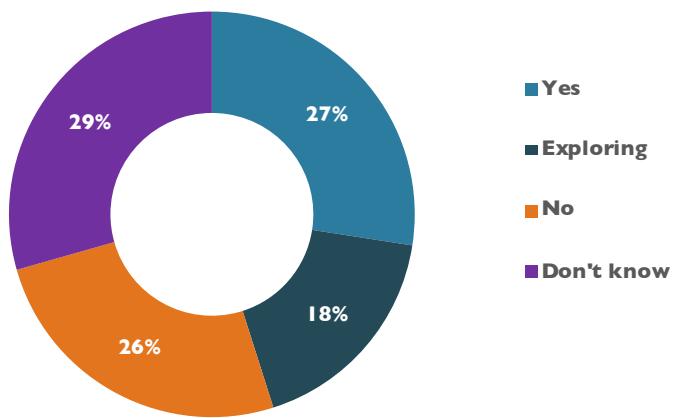
OER use in Québec is emergent and exploratory. A higher proportion of institutions report that cost is not a barrier compared to the rest of Canada.

Open educational resources (OER) are resources useful for teaching and learning (text, media, and other assets) that are freely accessible and openly-licensed (such as a Creative Commons license), where there is legal permission for creation, use, and reuse of educational content.

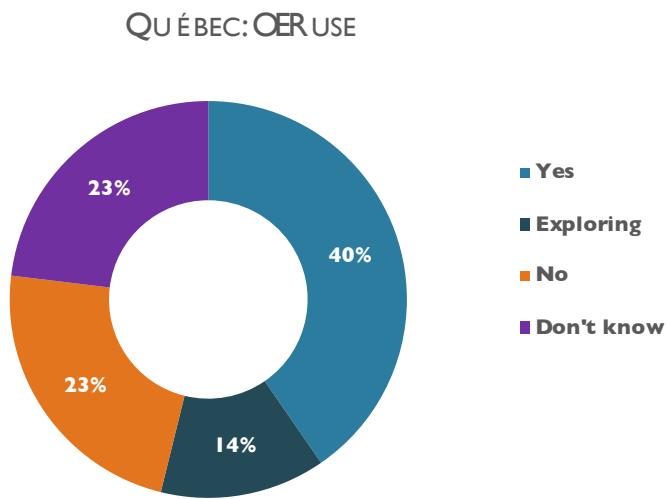
At the national level, of the 143 institutions that responded to the question on open textbook use at their institutions, 54% reported that they currently use open textbooks. An additional 17% are exploring their use.

In Québec, a considerably lower proportion of institutions reported using open textbooks (27%) with a comparable proportion (18%) to the national average exploring their use.

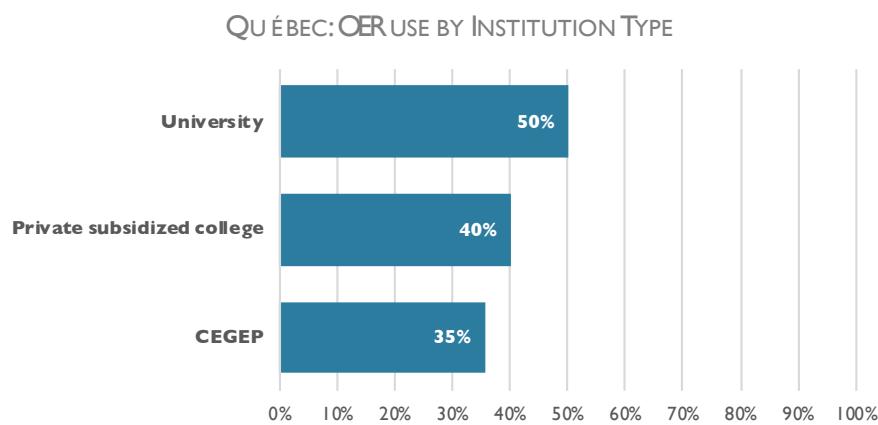
QUÉBEC: OPEN TEXTBOOK USE



The 2019 survey also asked institutions whether they use OER other than open textbooks. Nationally, the majority of institutions (67%) reported that they use other types of OER with an additional 10% exploring their use. In Québec, fewer institutions (40%) reported using other types of OER; however, a slightly greater proportion (14%) reported that they were exploring their use.



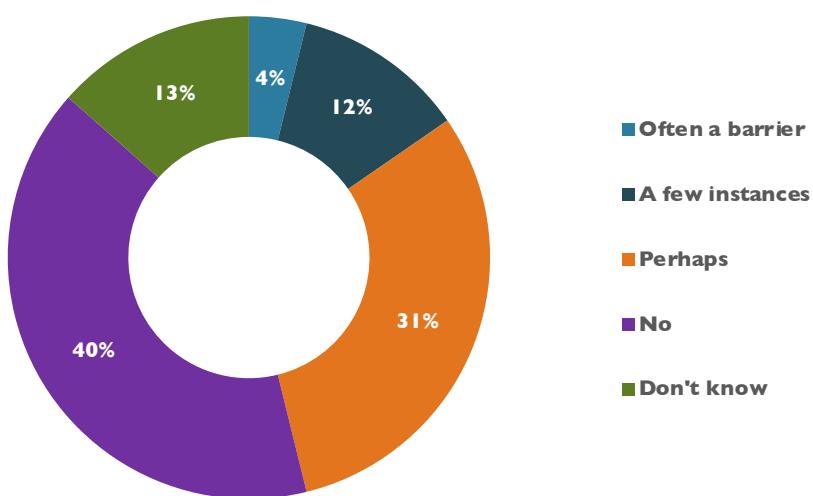
Universities in Québec were most likely to report the use of OER: 50% of responding universities reported using OER. A sizable minority of CEGEPS and private subsidized colleges also reported OER use.



The national results indicated that most institutions are concerned to some degree that cost is a barrier in preventing students from having the required material, with only 18% of institutions reporting that cost is not a concern.

In Québec, nearly half of the responding institutions reported having some level of concern that cost is a barrier; however, a significantly higher proportion of institutions (40%) reported that cost was not a concern compared to the national average (18%). Québec has highly subsidized tuition rates for students, which may be related to lower concerns about the costs of materials.

QUÉBEC: CONCERN ABOUT COST AS A BARRIER FOR COURSE MATERIALS

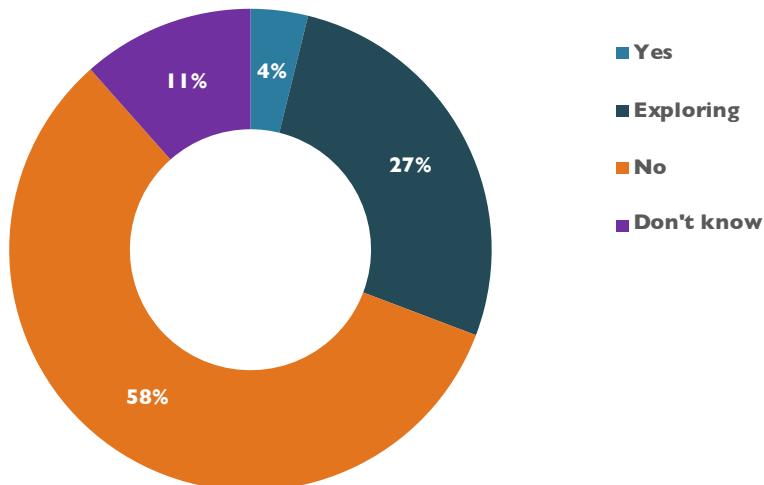


In Québec, a slight majority of institutions do not have a formal policy for OER or open pedagogy; however, this finding aligns with the greater proportion of institutions in Québec that reported that the cost of materials is not a concern.

Nationally, 48% of Canadian institutions reported that they either have (9%) or are exploring (39%) a formal policy or strategy for OER.

Within Québec, 4% of institutions reported having a formal policy or strategy for OER and an additional 27% are exploring the development of a strategy.

QUÉBEC: FORMAL POLICY OR STRATEGY FOR OER OR OPEN PEDAGOGY





Although OER use is not as widespread in Québec, as compared to other provinces, the open-ended comments from Québec institutions suggested that OER use is emerging, particularly through the initiatives of faculty.

We need more information to teachers to use these resources. For most, they know where to find and how to use such resources. There are probably personal initiatives on the part of teachers which we ignore their existence. (CEGEP)

We are developing a digital strategy for our university and OER for both online and in-person classes has been adopted as one of the core projects within that strategy. (Large University)

We are currently working with a handful of instructors who are independently using OERs or have expressed interest in working with students to identify appropriate resources. The Library and Teaching and Learning Services are collaborating. (Large University)

The use of such resources is not official by the institution, it is still an initiative of teachers. (Large University)

Our institution has not adopted a formal policy or strategy for educational resources or open learning practices, but encourages the use of such resources. (Large University)

We sent a survey to teachers on staff knowledge, practices, motivations and postures as to REL [OER]. (Large University)

FRANCOPHONE INSTITUTIONS OUTSIDE QUÉBEC

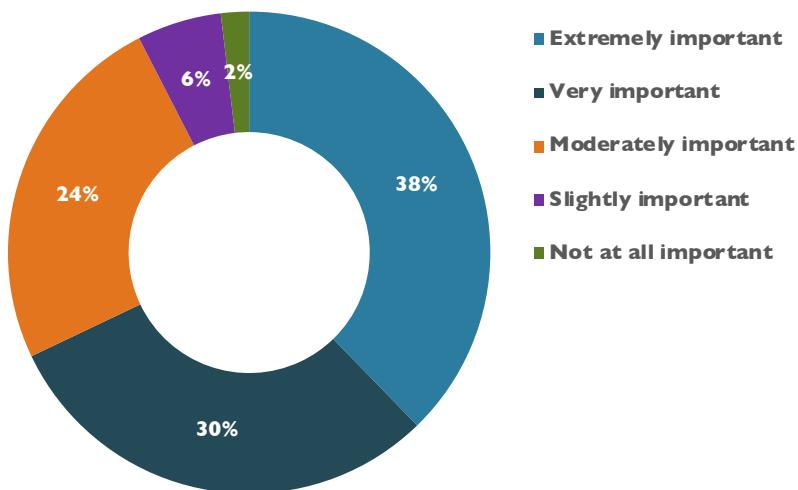
Outside of Québec, 7 francophone institutions responded to the survey questions about OER use. Of these institutions, 6 reported that they were either using OER or exploring OER use; however, no institutions reported using open textbooks. None of these francophone institutions reported having a formal policy or strategy for OER.

STRATEGIES AND PLANS

The majority of institutions in Québec consider online learning to be an important part of their long-term plan.

Consistent with the national results, online learning is highly important to long-term institutional plans in Québec: 38% of Québec institutions reported that online learning is extremely important to their long-term plan, and 30% reported that it was very important.

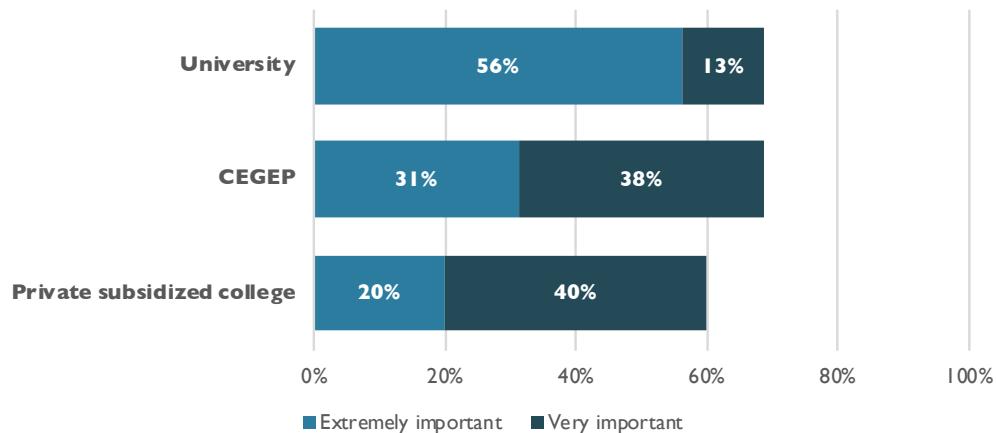
QUÉBEC: IMPORTANCE OF ONLINE LEARNING FOR LONG-TERM PLAN



Across Canada, colleges were most likely to report that online learning was important for their long-term plan, with 84% colleges rating this as very or extremely important.

In Québec, an equal proportion (69%) of universities and CEGEPS reported that online learning was extremely or very important to their long-term institutional plan; however, a greater proportion of universities (56%) reported that online learning was extremely important compared to CEGEPS (31%).

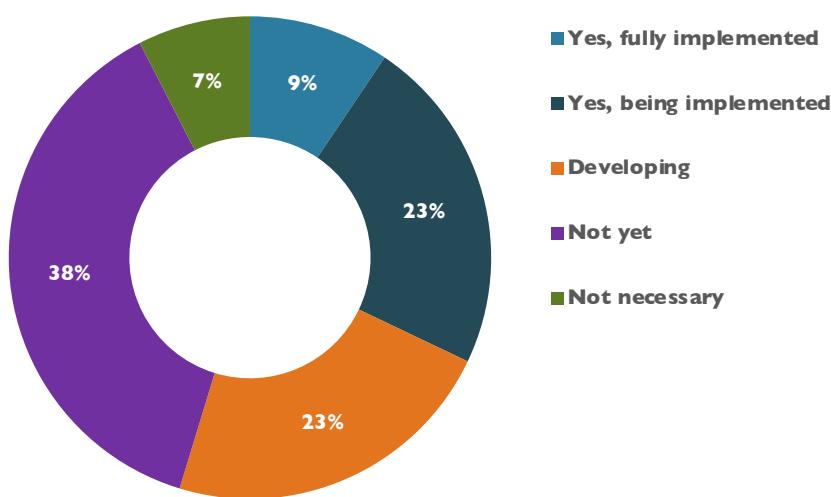
QUÉBEC: IMPORTANCE OF ONLINE LEARNING FOR LONG-TERM PLAN: INSTITUTION TYPE



Nationally, the proportion of institutions that are implementing a plan for online learning to some extent remains a minority (42%).

In Québec, 32% of institutions reported having a plan that is fully implemented or in the process of implementation. An additional 23% of Québec institutions are developing a plan. The greatest proportion of institutions within Québec (38%) reported they did not yet have a plan, but acknowledged a need for one. Only 7% of institutions reported that such a plan was not necessary.

QUÉBEC: STATUS OF STRATEGIC PLAN FOR E-LEARNING





In the open-ended comments, some Québec institutions shared their perspective as to why online learning was strategically important. Reasons included to offer a more personalized and accessible learning experience for students and to maintain an adequate number of students.

This is a key issue in the development of our college in a context of population decline and geographic dispersion. Can also meet manpower needs in small communities. (CEGEP)

Our college wants to offer more flexibility in its course offerings and more alternatives. The ADF is an excellent way to do this. In continuing education, in a region such as ours, all programs must be available online (almost) to gather sufficient cohorts for starting programs. (CEGEP)

We evaluate the possibility to offer courses in hybrid mode for small cohorts and / or summer courses. (CEGEP)

In Québec, with the advent of eCampus, distance learning becomes a strategic issue for all Québec universities and puts pressure on smaller universities. (Large University)

The development of e-learning or hybrid education is part of the institution's accessibility mission, particularly for students with atypical studies or having to combine their studies with their family or professional responsibilities. This is why e-learning or hybrid learning was one of the major focuses of the 2015-2019 Strategic Plan (Large University)

We believe that online or hybrid training is a good way to offer students the opportunity to have choices or personalize their student experience. We are exploring the idea of providing more resources to students. (Private Subsidized College)

FRANCOPHONE INSTITUTIONS OUTSIDE QUÉBEC

All responding francophone institutions outside Québec reported that online learning was important to some extent to the institution's long-term plan. All these institutions also reported that a plan for online learning was in some stage of implementation.

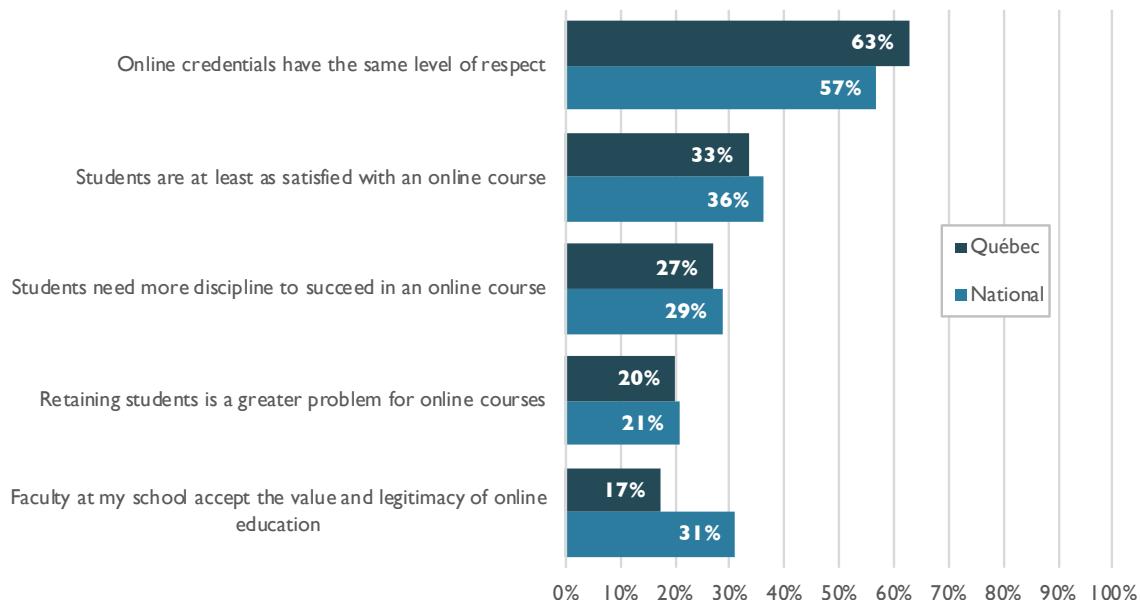
PERCEPTIONS OF ONLINE LEARNING

A greater proportion of institutions in Québec perceive online credentials to be equivalent to those earned in face-to-face courses; however, Québec institutions also reported that a lower proportion of faculty accepts the value of online education.

Nationally, a slight majority (57%) of institutions held the perception that online credentials have the same level of respect as face-to-face credentials. In Québec, a slightly greater proportion of responding institutions (63%) held this perception.

Most of the perceptions reported by Québec institutions were similar to the national results; however, a lower proportion of Québec institutions (17%) reported that faculty at their institution accept the value and legitimacy of online education compared to the national average (31%).

PERCEPTIONS OF ONLINE LEARNING





STRATEGIC IMPORTANCE OF ONLINE LEARNING

Québec institutions consider online learning to be of strategic importance for growing continuing education, to attract students from outside the traditional service area, and to increase student access.

The survey provided institutions with a list of reasons why online learning may be important. Respondents were asked to select all that applied.

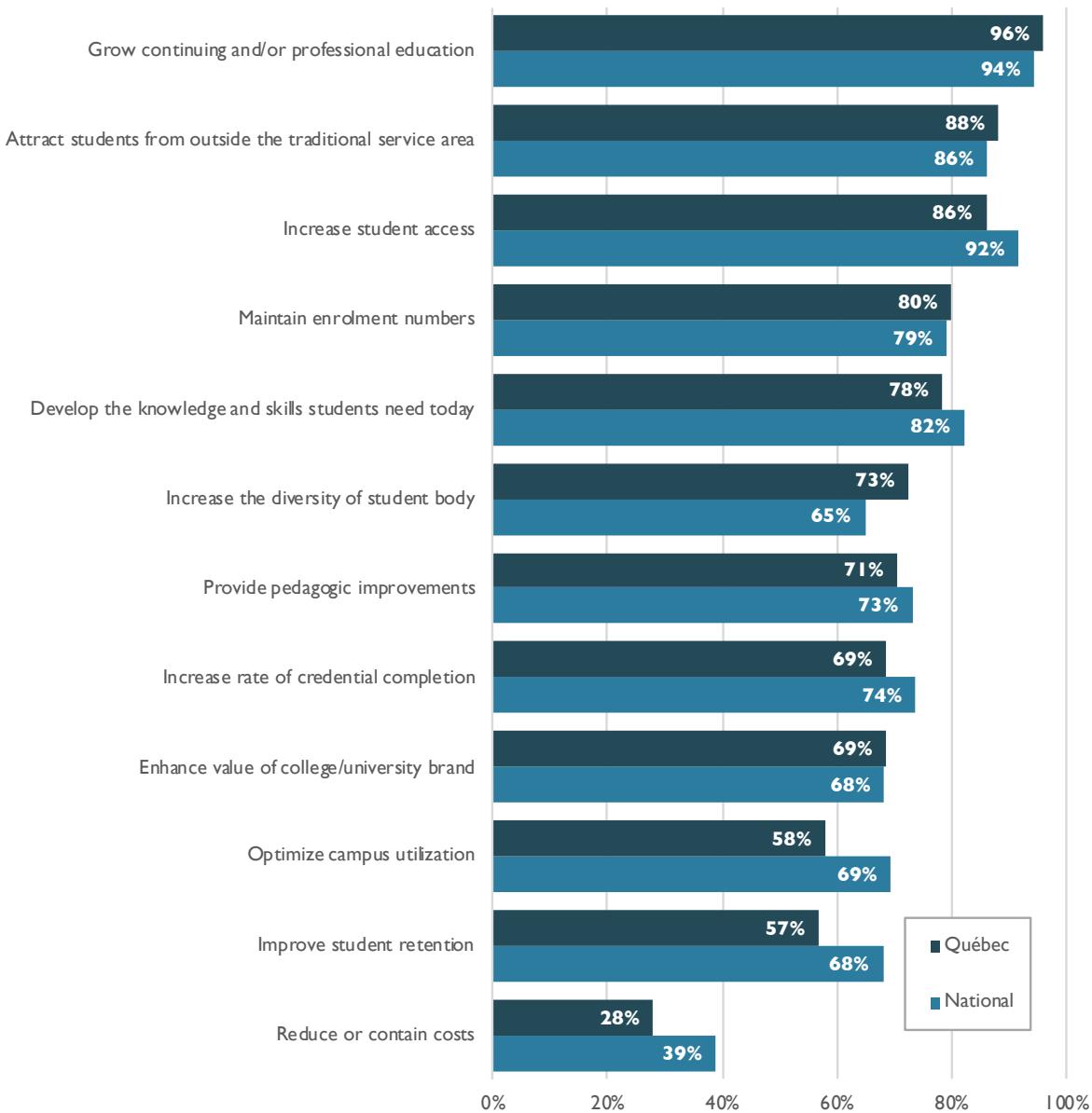
In Québec, the results were similar to the national level results. The four most reported reasons why Québec institutions considered online learning to be strategically important were: to grow continuing and/or professional education (96%), to attract students from outside the traditional service area (88%), increase student access (86%), and to maintain enrolment numbers (80%).

FRANCOPHONE INSTITUTIONS OUTSIDE QUÉBEC

All responding francophone institutions outside Québec reported that ‘attracting students from outside the service area’ and ‘maintaining enrolment numbers’ were very important strategic reasons for online learning.



STRATEGIC IMPORTANCE OF ONLINE LEARNING





BARRIERS TO THE ADOPTION OF ONLINE EDUCATION

In Québec, the top three reported barriers to the adoption of online learning relate to faculty.

Nationally, the top barrier to the adoption of online education, reported by institutions, was the additional faculty effort required. Additional faculty effort required was also the top barrier reported by institutions in Québec. Furthermore, institutions in Québec reported that inadequate training for faculty and the acceptance of online by faculty were barriers for more than three-quarters of institutions.

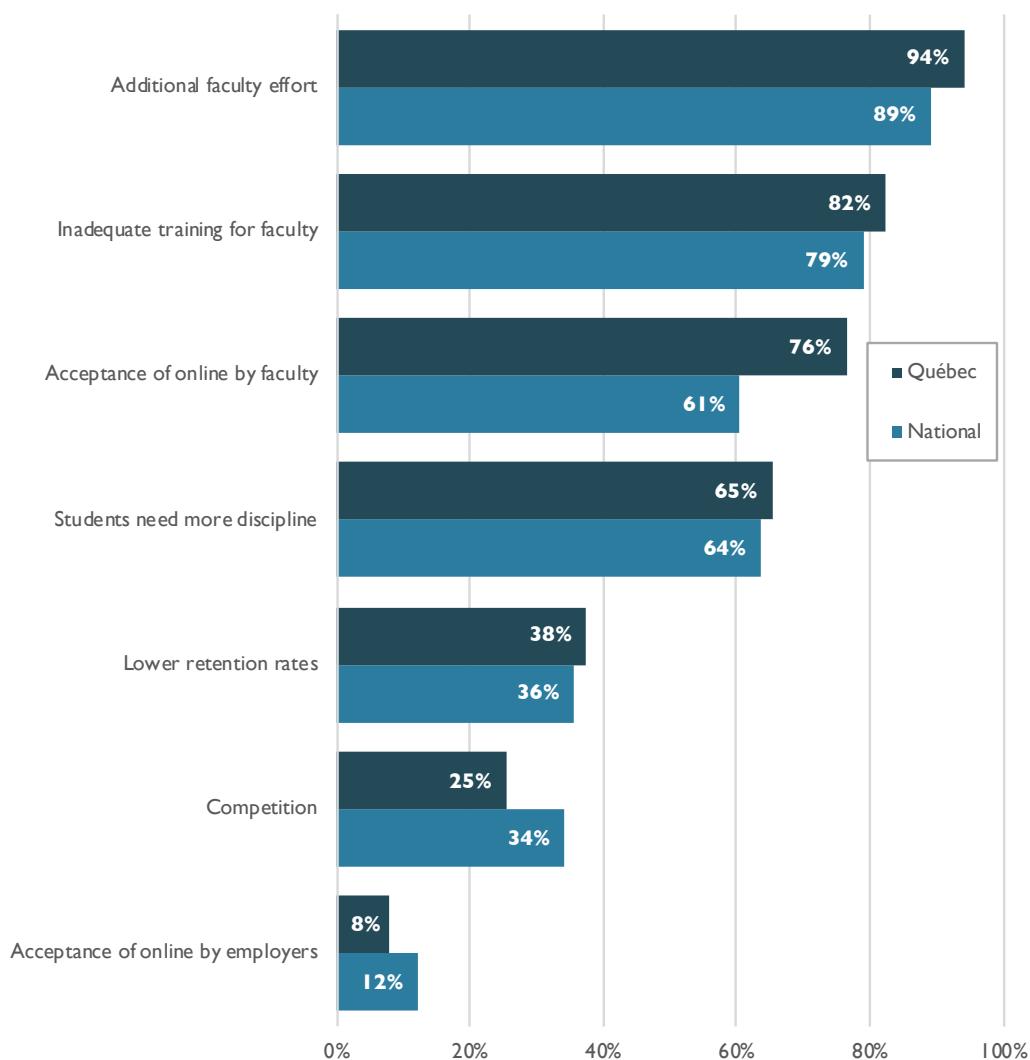
However, the open-ended comments indicated that institutions in Québec are working to overcome these barriers. One small/medium university wrote:

*We are trying to hire an instructional designer to support Faculty who teach online or to help guide those who are contemplating the switch. However, finding a qualified individual is not easy.
(Small/Medium University)*

A large university also described a shift in faculty attitudes:

Unlike just a few years ago, there is now a willingness of the faculty to develop hybrid or online courses. (Large University)

BARRIERS TO ONLINE EDUCATION



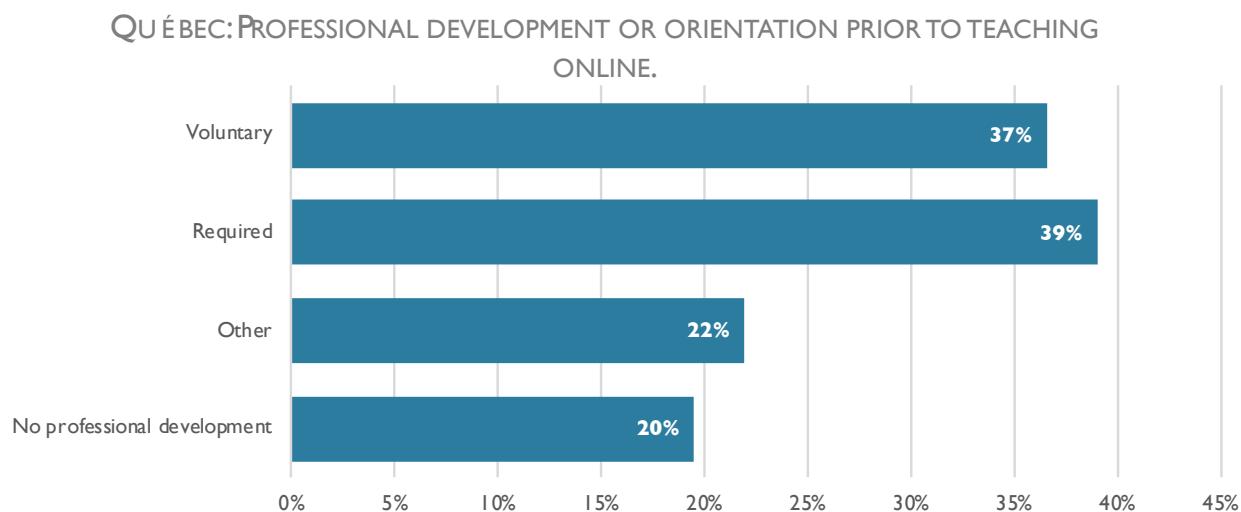
PROFESSIONAL DEVELOPMENT

Compared to the national average, more institutions within Québec require professional development for faculty that teach (or who will teach) online.

Over one-third of institutions in Québec offer some sort of professional development for faculty.

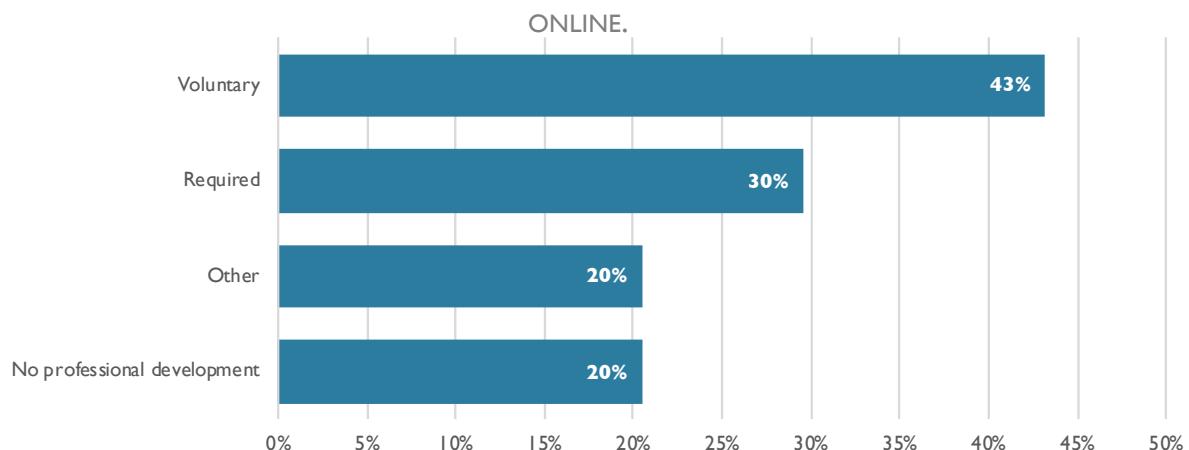
Of the Québec institutions that responded to the question on professional development, 37% reported that they offer it on a voluntary basis for teachers new to online teaching, and 39% of responding institutions require professional development for teachers new to online.

Nationally, while 58% of institutions offer voluntary professional development for faculty new to teaching online, only 29% of institutions require such training.



For experienced faculty teaching online, a higher proportion of institutions in Québec (30%) require professional development compared to the national average (15%). The proportion of responding institutions within Québec that offer voluntary professional development (43%) is lower when compared to institutions Canada-wide (73%); however, this may be a natural result of having more mandated training.

QUÉBEC: PROFESSIONAL DEVELOPMENT FOR EXPERIENCED FACULTY TEACHING ONLINE.



Open-ended responses also provided further insight into the nature of professional development offered by institutions in Québec. Several institutions mentioned that support is available to faculty on an individual basis, which may offer insight into the types of professional development that 20% of institutions reported as 'other' on the survey.

We have also established a mentoring approach in support and evaluation of the first online educational experience. (Small/Medium College)

With the implementation of our Digital Action Plan, actions, information, training, and support for teachers will be offered. (CEGEP)

We offer personalized support (educational and technology). Training and workshops are offered to all teachers and their participation is optional (Large University)

Teachers are accompanied by a team technopédagogues. (Large University)



FUTURE DEVELOPMENTS

Responses from institutions in Québec about their future developments in digital learning focused on innovation and growth.

As part of the survey, respondents were asked to comment on future developments being planned for their institution.

Several institutions described initiatives to incorporate new technologies at their institution, including facilities for videoconferencing, virtual classrooms, and virtual reality.

Other institutions mentioned institutional goals to improve services, to increase the number and diversity of online offerings, and to become more responsive to student needs.





CONCLUSIONS

We reiterate our thanks to the many institutions in Québec who participated in the 2019 survey and enabled us to gain a better understanding of the digital learning landscape in Québec.

The continued development of online learning is strategically important to many institutions in Québec, and a higher proportion of institutions in Québec have blended/hybrid offerings compared to the national average.

Most students that take online courses offered by Québec institutions reside within the province. Institutions mentioned using online offerings to maintain, or increase enrolment numbers several times in the open-ended comments.

While faculty support and training remain barriers for Québec institutions, the data shows that a higher proportion of Québec institutions require faculty training for teaching online and numerous institutions remarked that individual support for faculty that teach online was available. Faculty support and training for teaching online is a primary barrier at the national level.

Although there are more institutions that do not have online offerings in Québec, those that do have online offerings are implementing innovative practices and working to improve the quality of online learning.





METHODOLOGY

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

Almost all universities in Canada are funded provincially. There were multiple changes to the roster of institutions between 2017 and 2018, and only one change between 2018 and 2019. Based on 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 Military College of Canada (which has university status) to the roster.

A further change in 2018 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 roster. Finally, one provincially-funded institution changed its status from a college to a university between 2017 and 2018. There was only a single change in the roster between 2018 and 2019 when the activities of the institution formerly known as Cégep à distance were integrated with Collège de Rosemont.

Beginning in 2018, 'private subsidized colleges' in Québec were added to the roster. These establishments are recognized as a public interest and approved for subsidies by the Minister responsible for Higher Education that are fully accredited within the province.

Institutions that are not included in the roster include Canadian private for-profit universities, most of which are very small, as well as fully private career colleges and institutes.

The 2019 roster includes:

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

The resulting roster includes 152 colleges and 82 universities for a total of 234 institutions.





Questionnaire design and distribution

The initial questionnaire design for 2017 was based on surveys used in the U.S. by the Babson Survey Research Group, that were modified to meet the Canadian context. From 2017 to 2018 several questions were dropped where the information was not likely to change significantly from year to year. The 2018 survey also reflected the additional work on definitions and included questions to allow institutions to compare their definitions with those of the survey team. While the bulk of the survey remained the same from 2018 to 2019, some changes were made for 2019, adding additional questions on open resources, faculty professional development, and the location of online students.

All changes to the survey have been tested in pre-surveys. The definitions and enrolment questions in 2018 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 second pre-survey was conducted in 2019 asking institutions what information they tracked and could supply for proposed enrolment tracking questions.

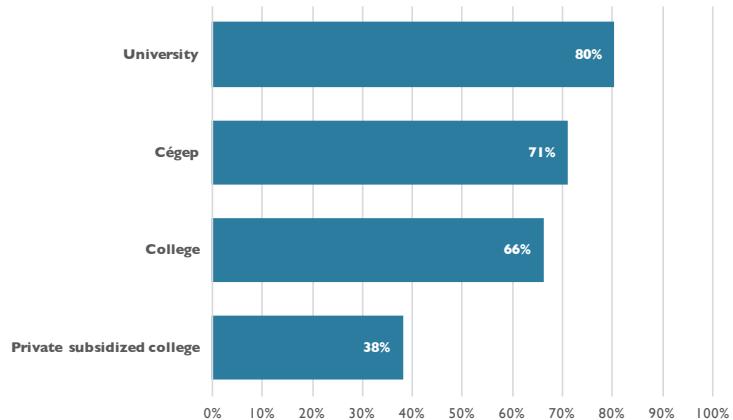
A survey invitation was sent to the Provost/VP Academic or Vice-President Education or Directeur général for each institution on the roster, with copies to the other institutional contacts. The questionnaire content was identical in both Anglophone and francophone versions of the questionnaire.

The questionnaire itself was a fillable PDF file, that could be shared among multiple people at the institution. Members of the project team actively followed up with institutions to answer any of their questions and to encourage them to participate. The project was also promoted through post-secondary educational networks or provincial organizations.



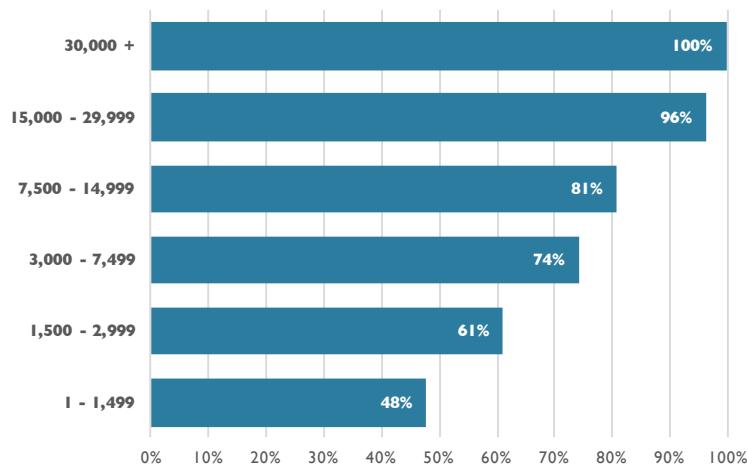
The overall institutional response rate was 70% for all types of institutions. Responses were highest from universities (80%) and lowest from the 21 private subsidized colleges in Québec (38%).

2019 RESPONSE RATE BY INSTITUTION TYPE



The response rate tended to be lower from the smaller institutions; nevertheless, close to half of even the smallest institutions responded. Since there was a higher response from the larger institutions, the questionnaire responders represent institutions with 90% of the student population base and 95% of all online enrolments.

2019 RESPONSE RATE BY INSTITUTION SIZE





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 institutions, representing 70% of all institutions and 90% of all students studying for institutional credit at Canadian publicly-funded post-secondary institutions.

Questions on course registrations

Survey questions addressing numbers of course registrations and numbers of students have been revised each year based on feedback from responding institutions. The 2017 questionnaire included several enrolment questions, which proved difficult (or impossible) for many institutions to answer. The 2018 survey scaled this back considerably to include only six questions: three on overall enrolments and three on online enrolments. A pre-survey conducted ahead of the 2019 main survey provided even more feedback, resulting in a further reduction in the number of questions to only four: two on overall enrolments and two on online enrolments.

The fact that it remains difficult for many institutions to provide data consistent with the survey questions is to be expected. The lack of a universal reporting requirement, the differing reporting standards for each province, and the wide-ranging internal tracking requirements for the institutions themselves have resulted in multiple systems designed to meet specific institutional and governmental agencies reporting objectives.

A further complication is that, while the question of ‘how many students?’ may sound simple, it is anything but. Provinces and institutions can have widely ranging definitions of what constitutes a ‘student’. Questions arose and included: Should institutions count all students or convert part-time counts into full-time equivalents (FTE)? Should institutions count all students or only students taking for-credit courses or programs? Do students in continuing education or other non-core programs count as part of the main institution? Should institutions count only those being supported by a particular program or all of the students, regardless of their support?

All of these factors lead to considerable variability in what each institution can measure and report, making reliable comparisons across institutions extremely difficult. However, it is possible to compare the same data element across time for the same institution, provided that an identical question is being asked at each point in time. The year-to-year comparisons in this report use an identical question on total online course registrations over the academic year.





BACKGROUND TO THE 2019 NATIONAL SURVEY

Collectively, the National Survey aims to cover all types of publicly-funded post-secondary institutions within every province and territory. The inaugural survey was launched in 2017, and over time, we have modified the questions in response to suggestions from responding institutions.

Since our inception, we have developed, and are continuously revising, a comprehensive roster of all publicly-funded post-secondary institutions. This is part of an ongoing effort to build a strong relationship between the research team and every post-secondary institution in our roster. We strive to acknowledge and portray the diversity in post-secondary institutions in our endeavors.

From its outset, the survey has been a bilingual undertaking, acknowledging that the provincial post-secondary system in Québec differs significantly from other provincial and territorial jurisdictions. We also recognize that there is a significant number of francophone institutions across Canada.

Each year, we review the responses, suggestions, and advice that responding institutions share with us. In early 2019, we sent a preliminary survey to determine whether institutions would be able to provide data on new areas of interest. Our research team collected, analyzed, and integrated responses from the preliminary survey into the 2019 Canadian National Survey of Online and Digital Learning. The survey launched in April and data collection concluded in July. We received a small number of responses in August and included these in the data analysis.

We invite you to reach out to our research team to offer feedback and suggestions for future surveys and research projects that investigate digital learning at post-secondary institutions across Canada.





2019 PRIMARY RESEARCH TEAM

Nicole Johnson is the newly appointed Research Director of the Canadian Digital Learning Research Association. She was the primary author for the 2019 National Report and works closely with Dr. Tony Bates, Dr. Jeff Seaman and Dr. Tricia Donovan. She is currently an online PhD student in the Education and ICT (e-learning) program at the Open University of Catalonia in Barcelona, Spain, while residing in Abbotsford, B.C. Nicole completed her Master of Educational Technology degree online through UBC and also holds Bachelor degrees in Education and Human Kinetics from UBC. Additionally, Nicole is currently part of a research team at Royal Roads University that is exploring the nature of academics' online participation over time.

Dr. Tony Bates is currently a Senior Advisor at the Chang School of Continuing Education, Ryerson University. He is also a Research Associate at Contact North|Contact Nord. He has 50 years of experience in using technology for teaching, including teaching online, managing online programs, conducting research into educational technologies, and consulting on digital learning strategies and management. Tony has pioneered the Canadian National Survey and is a Director of the Board, CDLRA/ACRFL.

Dr. Jeff Seaman has worked in education information technology his entire career and currently serves as Director of the Babson Survey Research Group. His experience includes creating and running the Computing Resource Center at the University of Pennsylvania, Chief Technology Officer at HighWired.com, Vice President of Engineering for Vista Associates, and Chief Information Officer for Lesley University. He has taught at multiple institutions and served on numerous academic technology advisory boards including Apple Computer, IBM, and Microsoft.

Dr. Tricia Donovan is currently the Principal, eCampus at NSCC. She has over twenty years of experience with online, distance and digital education with colleges, universities and consortia. She was the Executive Director, eCampusAlberta for 15 years and works closely with the eCampus organizations across Canada and in partnership with WCET in the United States. She has experience in working with online and digital learning strategic planning, quality assurance in online learning and consultation. Tricia also serves as Project Lead for the National Survey and is a Director of the Board.





2019 EXECUTIVE CONSULTANTS

The Canadian National Survey is made possible through the dedication and commitment of our team of Executive Consultants. Their collective experience and understanding of the Canadian post-secondary system, and of research in online and digital learning, is unparalleled.

Dr. Denis Mayer, is currently serving as interim Board Chair for the Higher Education Quality Council of Ontario (HEQCO) and is a board member of the Canadian Digital Learning Research Association. Formerly at Laurentian University he led Continuing Education and Student Affairs and was involved in distance and online learning regionally, provincially and nationally. He chaired the board of the Canadian Virtual University, the board of the Canadian Association for Distance Education and was a board member for the Ontario Council for University Lifelong Learning and Contact North. He now does consulting in distance education and online learning.

Dr. Brian Desbiens currently is coaching CEO and Senior Executive teams at six institutions (University, College, Health Care and educational support agencies) in Ontario. He is a Research Associate at Contact North | Contact Nord. He is a past President of Sir Sandford Fleming College and worked in the college system for 36 years. He is an Adjunct Professor in the Higher Education Department of the Ontario Institute of Education at the University of Toronto and teaches Leadership in the doctoral program.

Éric Martel is currently Director of distance learning at Université Laval. He is also a Lecturer in the Department of Management at Université Laval and has been teaching undergraduate and graduate online courses since 2002. He has over ten years of experience in managing online programs, recruiting students in online programs and developing online courses.

Dr. Ross Paul spent more than 35 years in senior academic administrative positions in Canadian colleges and universities including presidencies at Laurentian University and the University of Windsor. He has written extensively on leadership and management issues and is best known for his books *Open Learning and Open Management: Leadership and Integrity in Distance Education* (1990) and *Leadership Under Fire: The Challenging Role of the Canadian University President* (2nd edition, 2015).

Vivian Forssman has expertise in online learning strategy, program development, learning design, and technology operations. She is currently part of a team focused on climate change with the BC Professionals Adaptation Network Project. From 2013 – 2017 she served as the Director of the Centre for Teaching and Educational Technologies at Royal Roads University, providing pedagogical and technical support for faculty; implementing learning technologies; and improving curricular alignment through program mapping services. She holds an MBA from the University of Cape Town, and undertook doctoral research focused on technology policy in higher education, through Simon Fraser University, in the period 2004-2008.

Russ Poulin is the Executive Director, WICHE Cooperative for Educational Technologies (WCET), Vice President for Technology-Enhanced Education, Western Interstate Commission for Higher Education (WICHE). Russ has more than 20 years of experience focused on the practice, policy, and advocacy of technology -enhanced learning in higher education. Russ, and WCET, have partnered with CDLRA/ACRFL and have worked in concert with eLearning consortia in both the United States and Canada. He has received recognition from the Presidents' Forum, Excelsior College, and the National University Technology Network for his contributions to policies for technology-enhanced postsecondary education. Poulin received a bachelor's degree from the University of Colorado Denver and a masters from the University of Northern Colorado.



ROSTER OF INSTITUTIONS

Alberta

Alberta University of the Arts
Athabasca University
Bow Valley College
Centre Collégial de l'Alberta - Campus Saint-Jean
Grande Prairie Regional College
Keyano College
Lakeland College
Lethbridge College
MacEwan University
Medicine Hat College
Mount Royal University
Norquest College
Northern Alberta Institute of Technology (NAIT)
Northern Lakes College
Olds College
Portage College
Red Deer College
SAIT Polytechnic
University of Alberta
University of Calgary
University of Lethbridge

British Columbia

British Columbia Institute of Technology
Camosun College
Capilano University
Coast Mountain College
Collège Éducacentre
College of New Caledonia
College of the Rockies
Douglas College
Emily Carr University of Art and Design
Justice Institute of British Columbia
Kwantlen Polytechnic University
Langara College
Nicola Valley Institute of Technology
North Island College
Northern Lights College

Okanagan College

Royal Roads University
Selkirk College
Simon Fraser University
The University of British Columbia
Thompson Rivers University
University of Northern British Columbia
University of the Fraser Valley
University of Victoria
Vancouver Community College
Vancouver Island University

Manitoba

Assiniboine Community College
Brandon University
Canadian Mennonite University
Manitoba Institute of Trades and Technology
Red River College
The University of Winnipeg
Université de Saint-Boniface
University College of the North
University of Manitoba

New Brunswick

Collège communautaire du Nouveau-Brunswick
- Campus d'Edmundston
Maritime College of Forest Technology
Mount Allison University
New Brunswick College of Craft and Design
New Brunswick Community College
St. Thomas University
Université de Moncton
University of New Brunswick -St. John

Newfoundland and Labrador

College of the North Atlantic
Memorial University of Newfoundland

Northwest Territories

Aurora College
Collège Nordique francophone



Nova Scotia

Acadia University
Canadian Coast Guard College
Cape Breton University
Dalhousie University
Gaelic College
Mount Saint Vincent University
Nova Scotia Community College (NSCC)
NSCAD University
Saint Mary's University
St. Francis Xavier University
Université Sainte-Anne

Nunavut

Nunavut Arctic College

Ontario

Algoma University
Algonquin College
Brock University
Cambrian College
Canadore College
Carleton University
Centennial College
Collège Boréal
Conestoga College Institute of Technology and Advanced Learning
Confederation College of Applied Arts and Technology
Durham College
Fanshawe College
Fleming College of Applied Arts and Technology
George Brown College of Applied Arts and Technology
Georgian College of Applied Arts and Technology
Glendon College
Humber College
La Cité
Lakehead University
Lambton College
Laurentian University

Loyalist College of Applied Arts and Technology

McMaster University
Mohawk College
Niagara College
Nipissing University
Northern College
OCAD University
Ontario Tech University
Queen's University
Royal Military College of Canada
Ryerson University
Sault College
Seneca College
Sheridan College
St. Clair College
St. Lawrence College of Applied Arts and Technology

The Michener Institute of Education at UHN
Trent University
Université de Hearst
University of Guelph
University of Ottawa
University of Toronto
University of Waterloo
University of Windsor
Western University
Wilfrid Laurier University
York University

Prince Edward Island

Collège de l'Île-du-prince-Edouard
Holland College
University of Prince Edward Island



Québec

Bishop's University
Campus Notre-Dame-de-Foy
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 Sherbrooke
Cégep de Sorel-Tracy
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
Centre Matapédien d'études collégiales
Champlain Regional College
Collège Ahuntsic

Collège André-Grasset
Collège Bart
Collège Centennial
Collège d'Alma
Collège de Bois-de-Boulogne
Collège de Maisonneuve
Collège de Rosemont
College de Valleyfield
Collège Ellis
Collège Gérald-Godin
Collège international des Marcellines
Collège international Marie de France
Collège Jean-de-Brébeuf
Collège Laflèche
Collège LaSalle
Collège Lionel-Groulx
Collège Marianopolis
Collège Mérici
Collège Montmorency
Collège O'Sullivan de Québec
Collège Shawinigan
Collège Stanislas
Collège TAV
Collège Universel - Campus Gatineau
Collégial international Sainte-Anne
Concordia University
Dawson College
École de musique Vincent-d'Indy
École de sténographie judiciaire
École de technologie supérieure
École nationale d'administration publique
École nationale de cirque
École Polytechnique de Montréal
HEC Montréal
Institut de technologie agroalimentaire
Institut de tourisme et d'hôtellerie du Québec
Institut national de la recherche scientifique
McGill University
Séminaire de Sherbrooke
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

Saskatchewan

Carlton Trail College

Collège Mathieu - Saskatchewan

Cumberland College

Great Plains College

La Cité Universitaire francophone de
l'Université de Regina

North West Regional College

Northlands College

Parkland College

Saskatchewan Polytechnic

Southeast College

University of Regina

University of Saskatchewan

Yukon

Yukon College





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