

# Tracking Online Education in Canadian Universities and Colleges:

## National Survey of Online and Digital Learning

### 2019 Western 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

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

The sub-report on the Western region includes the national results from across the country and focuses on the responses from post-secondary institutions in Manitoba, Saskatchewan, Alberta, and British Columbia. Western-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 the Western region, 21 universities and 20 colleges completed the survey, resulting in a 60% response rate.





### **Key findings:**

The vast majority (91%) of institutions in Western Canada offer online courses for credit.

Most institutions in Western Canada (92%) reported that online learning is important to some extent to their long-term plan.

A greater proportion of institutions in Western Canada reported OER use compared to the national average.

Compared to the national results, fewer institutions in Western Canada reported that faculty acceptance of online learning was a barrier to the adoption of online education.

A higher proportion of Western Canadian institutions reported having online students that reside outside the province in comparison with the national results.





## 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 Western sub-report was prepared to provide insight and specific reference to the results provided by universities and colleges in Manitoba, Saskatchewan, Alberta, and British Columbia 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](mailto:tdonovan@onlinelearningsurvey.ca)







## ONLINE ENROLMENT DATA

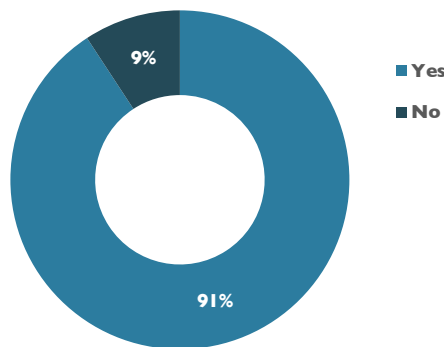
***Online learning is widespread in universities and colleges throughout the Western region.***

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, 177 institutions (76%) offer some form of online learning and 57 institutions (24%) do not.

In Western Canada, 91% of institutions offer online courses for credit.

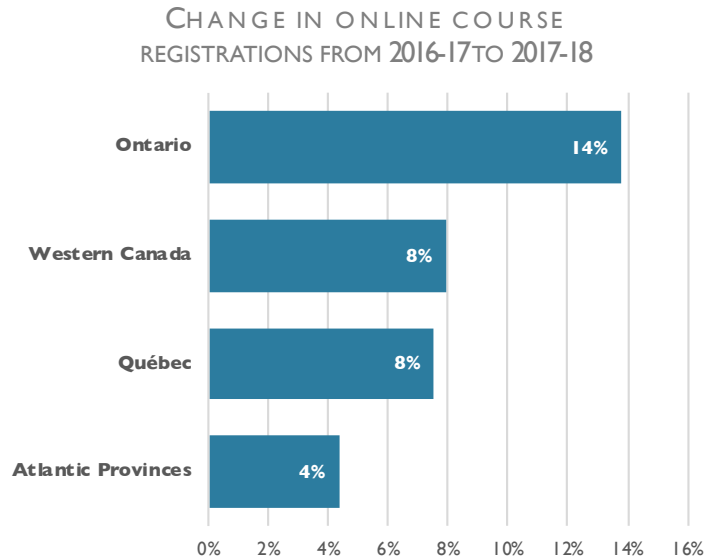
WESTERN REGION: FOR-CREDIT ONLINE COURSE OFFERINGS



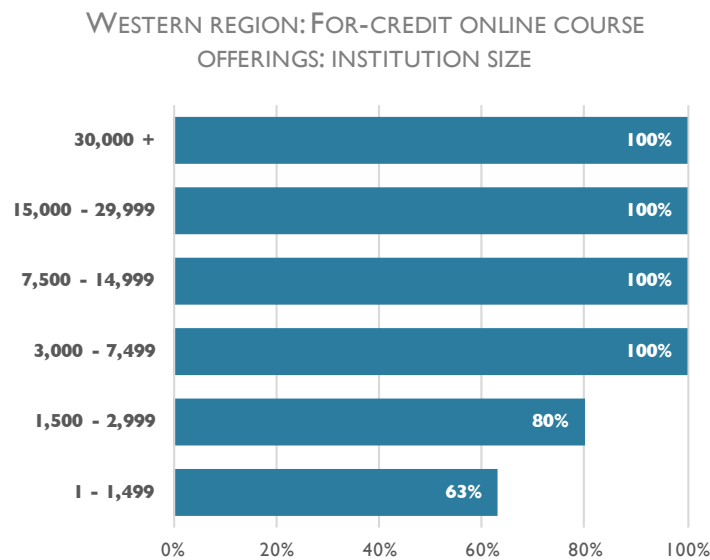
Nationally, online course registrations grew by around 10% between 2016-17 to 2017-18. This result, based on online course registration data among institutions who reported in both survey years, is broad-based with gains seen in all regions of the country, among all sizes of institutions, and among all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



Institutions in Western Canada experienced a slightly lower rate of growth in online course registrations (8%) between 2016-17 and 2017-18, when compared to the national growth rate of 10%.

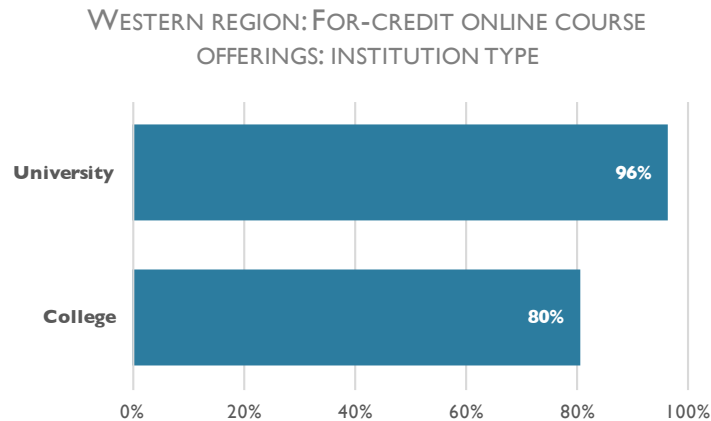


Institution size is a factor in whether online courses are offered at Western institutions: all institutions with more than 3,000 enrolments offered online courses for credit. Of the institutions with less than 3,000 enrolments, a sizable majority had online offerings.





Almost all universities (96%) and the majority of colleges (80%) in the Western region have for-credit online offerings.



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 Western Canada, 31 of 68 (46%) institutions provided reliable data for both years. Those reporting course enrolment data were, on average, three times the size of those who did not, and together they represented 73% of all Western Canada enrolments.



## ONLINE COURSE REGISTRATION BY LOCATION

***Institutions in Western Canada had a higher than average proportion of online students residing outside their 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. 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 38% of institutions with online offerings reporting that they tracked this data and were able to provide actual numbers.

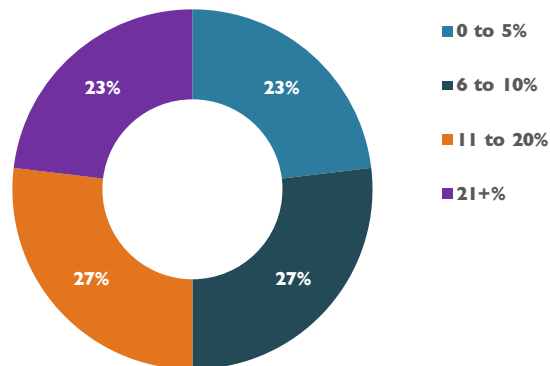
In Western Canada, 35% of institutions did not track the proportion of online students that resided in within their province.

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.

Online students attending institutions within Western provinces were more likely to reside outside the province than those attending institutions in other regions: half of the responding institutions reported that more than 10% of online students were from outside their province, compared to only 31% of institutions nationally.

Canada-wide, only 10% of institutions reported that more than 21% of their students resided outside their province. In the Western provinces, 23% of institutions reported that more than 21% of students lived out of province.

WESTERN REGION: PROPORTION OF ONLINE STUDENTS FROM OUTSIDE OF PROVINCE





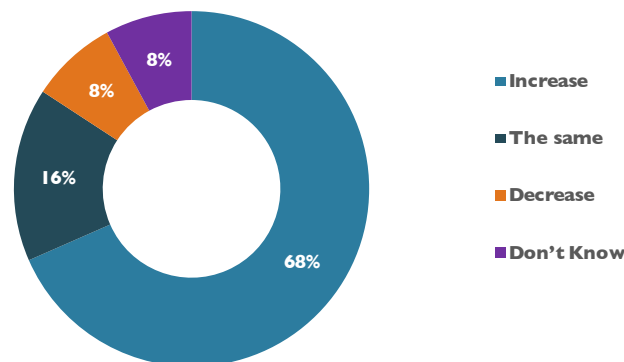
## EXPECTATIONS FOR ONLINE ENROLMENT

***The majority of institutions in Western Canada 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.

The results for institutions in Western Canada were comparable to the national-level results: 68% of institutions expected online enrolments to increase in the coming year and 16% expected online enrolments to stay the same.

WESTERN REGION: EXPECTED CHANGE IN ONLINE ENROLMENTS  
FOR NEXT YEAR

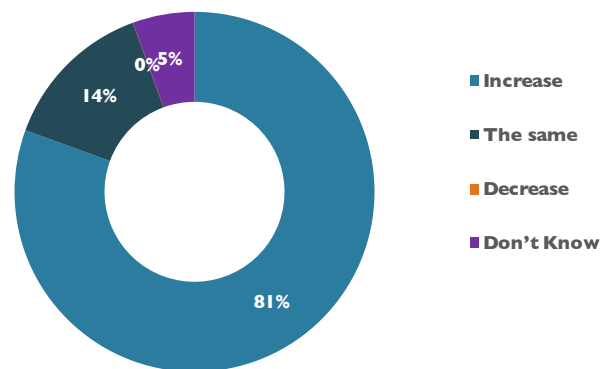




Institutions were also asked to predict change in total for-credit enrolments (the sum of their online and in-person courses) for the next year and, across Canada, fewer institutions (63%) predicted growth in their total enrolments compared to their online growth expectations (71%).

Western Canada differed from other regions as the expected growth in total enrolments (81%) exceeded the expected growth in online enrolments (68%).

WESTERN REGION: EXPECTED CHANGE IN TOTAL ENROLMENTS  
FOR NEXT YEAR



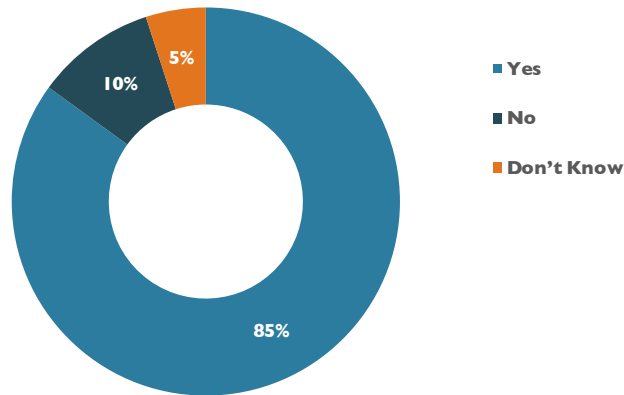


## BLENDED/HYBRID COURSES

***Blended/hybrid offerings are widespread within institutions in Western Canada.***

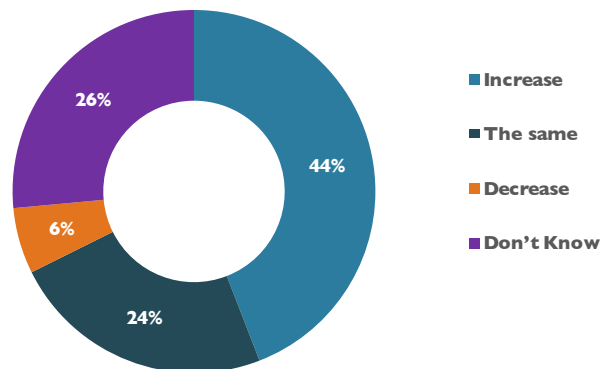
A greater proportion of Western institutions (85%) reported offering blended/hybrid courses when compared to the national average (76%).

WESTERN REGION: BLENDED OR HYBRID COURSE OFFERINGS



***Changes 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. Compared to the national results, slightly more institutions in Western Canada (44%) reported an increase in blended/hybrid enrolments from the previous year and fewer (24%) reported that blended/hybrid enrolments had stayed the same. An additional 26% of institutions reported that they did not know.

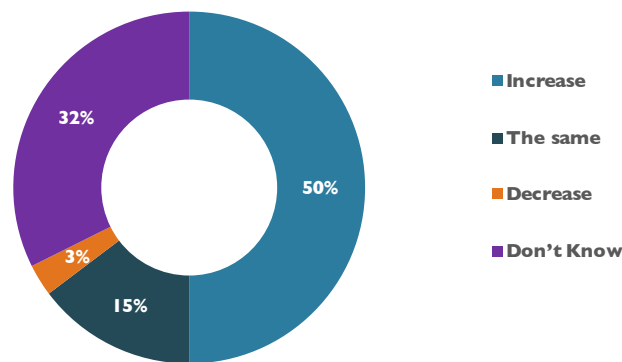
WESTERN REGION: CHANGE IN BLENDED ENROLMENTS FROM LAST YEAR





*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%). Fewer institutions in Western Canada (65%) expect that blended/hybrid enrolments will either increase (50%) or stay the same (15%), compared to the national average. A large minority of institutions (32%) reported that they did not know.

WESTERN REGION: EXPECTED CHANGE IN BLENDED ENROLMENTS FOR NEXT YEAR



*We are working with faculty to develop more online courses in general and blended/hybrid options to offer more flexibility for students. (Large University)*

”





## ALTERNATIVE CREDENTIALS

***Institutions in Western Canada are more likely to offer competencies and less likely to offer micro-credentials compared to the national results.***

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, operational definitions are needed to support institutions in classifying and tracking such offerings.

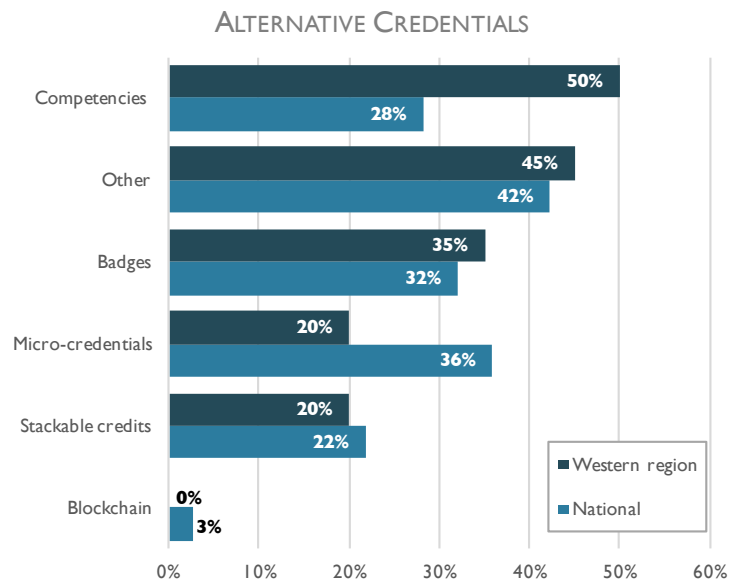
Nationwide, of the institutions that responded to whether they offer alternative credentials, nearly one-half are experimenting with these offerings.

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 Western Canada, a similar proportion (45%) of responding institutions reported that they offered some ‘other’ alternative credentials compared to the national results (42%).

In Western Canada, 50% of institutions reported offering competencies, which is considerably higher than the national average (28%); however, institutions in Western Canada were also much less likely to offer micro-credentials (20%) compared to the national-level results (36%).

*Our institution is re-imagining adult education with a new initiative. This initiative responds to the current workforce disruption in a way that supports both employers and employees. This initiative will give employees a portfolio of skills and competencies that help them shift in their career, and meet Canada’s future workforce needs. Professional development content is everywhere, allowing people to learn skills online, or through courses and work experience. The problem is finding a way to assess and recognize that knowledge. But, with this initiative we can assess competencies, regardless of how they were acquired, and then endorse them with a trusted micro-credential. This initiative validates the learning process in an accessible, and meaningful way for employers and employees. This initiative also helps employers to hire and retain the right talent, and reduces the cost of ongoing corporate training. (Large College)*

”





## TECHNOLOGIES

***In Western Canada, the use of technologies for teaching and learning was similar to the national-level results.***

The survey provided a list of technologies and asked institutions to check any of these technologies that they utilize in teaching and learning. 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 (93%) in their online courses. In Western Canada, almost all institutions (98%) use LMS technology.

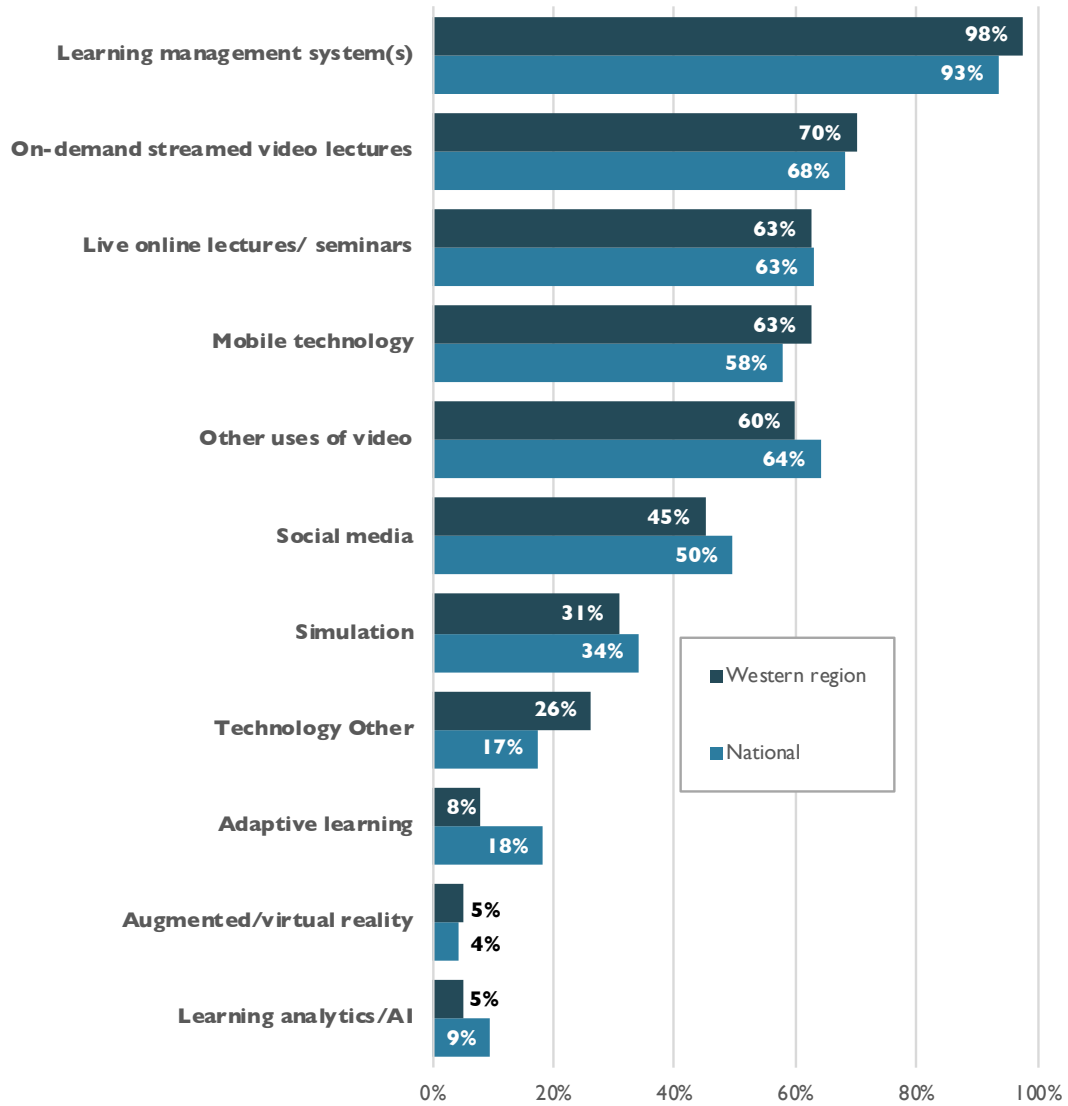
As seen in the national results, more than half of institutions in Western Canada reported using video-based technologies (70% provided on-demand lectures, 63% live-streamed lectures, and 60% used video in other ways) and mobile technology (63%). A sizable minority of institutions also reported using social media (45%) and simulation (31%).

*We have talked about using AI to help support students (and perhaps faculty) in the use of online technologies. We have a high fidelity simulation centre that supports some online courses as well. Students use mobile technology, even if courses or the LMS is not designed for such use. This can cause challenges for students. We are finding our enterprise video recording system (screen capture or camera) is easy for faculty to use and has therefore increased our use of video. Augmented reality is something we are in early stages of exploring. (Large University)*





## TECHNOLOGIES USED IN ONLINE COURSES





## OPEN EDUCATIONAL RESOURCES

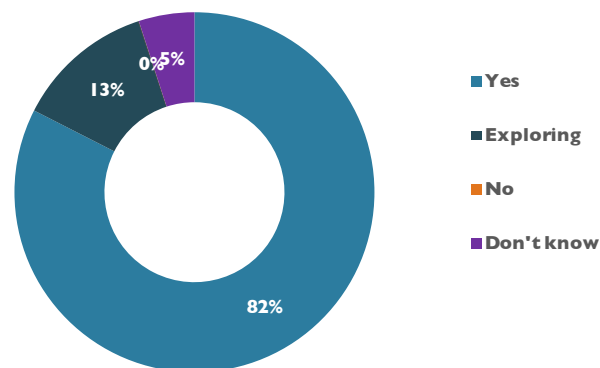
***A greater proportion of institutions in Western Canada reported OER use compared to the national average.***

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 institution, 54% reported that they currently use open textbooks. An additional 17% are exploring their use.

In Western Canada, a substantial majority of institutions (82%) reported using open textbooks and an additional 13% reported that they were exploring open textbook use.

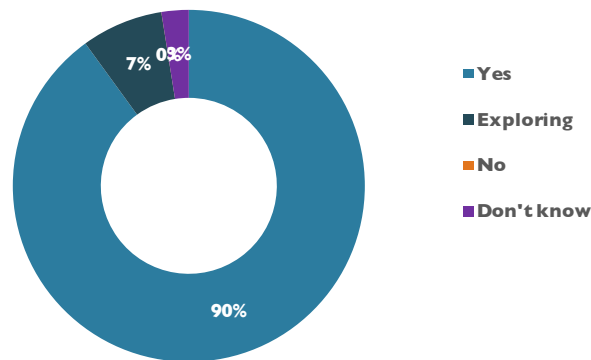
WESTERN REGION: OPEN TEXTBOOK USE





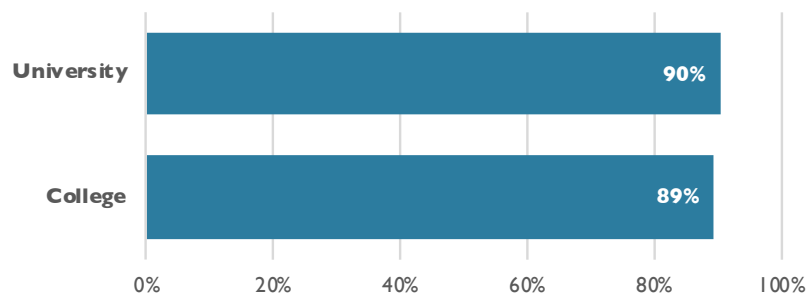
The 2019 survey also asked institutions whether they use OER other than open textbooks. In the Western region, the vast majority (90%) reported using other types of OER and the remainder reported that they were either exploring OER use (7%) or did not know whether their institution used OER (3%).

WESTERN REGION: OER USE



Universities and colleges in Western Canada were equally likely to report the use of OER.

WESTERN REGION: OER USE BY INSTITUTION TYPE

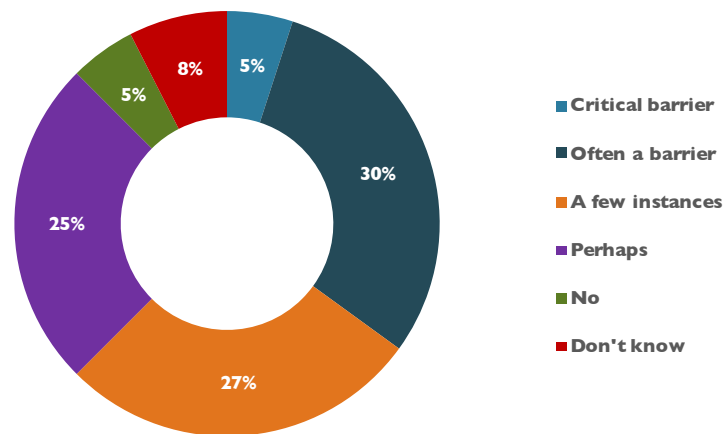




The national results indicated that most institutions are concerned to some degree that cost is a barrier in preventing students from having the required material with only 18% of institutions reporting that cost is not a concern.

Most institutions in Western Canada reported having some level of concern that cost of materials is a barrier for students. Roughly one-third of institutions in the Western region reported that cost is a critical or frequent barrier.

WESTERN REGION: CONCERN ABOUT COST AS A BARRIER FOR COURSE MATERIALS

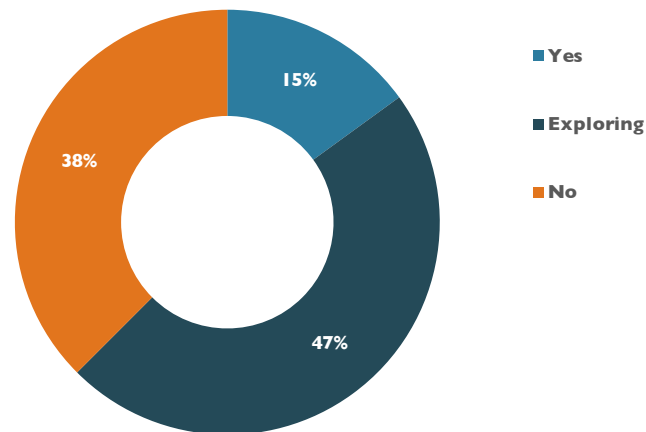




Nationally, 48% of Canadian institutions reported that they either have (9%) or are exploring (39%) a formal policy or strategy for OER.

Institutions within Western Canada were more likely to report that they either have a formal policy or strategy for OER (15%) or are exploring the development of one (47%).

WESTERN REGION: FORMAL POLICY OR STRATEGY FOR OER OR  
OPEN PEDAGOGY



*Our institution is exploring an institution-wide strategy and does have two programs that have moved away from the use of any resources for which the students must pay additional fees/costs. Our learning design process clearly articulates OER materials be considered at the course planning stage. (Small/Medium University)*





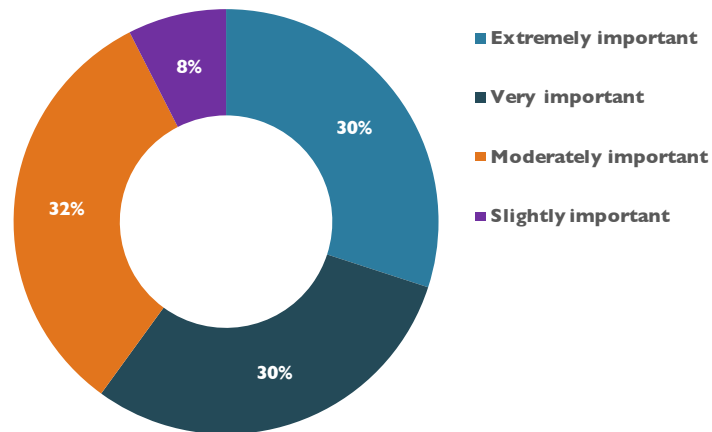


## STRATEGIES AND PLANS

***Almost all institutions in Western Canada consider online learning to be an important part of their long-term plan.***

Consistent with the national results, online learning is recognized as a highly important part of institutional long-term plans in Western Canada: 60% of Western Canadian institutions reported that online learning is extremely or very important to their long-term plan. An additional 32% reported that online learning is moderately important.

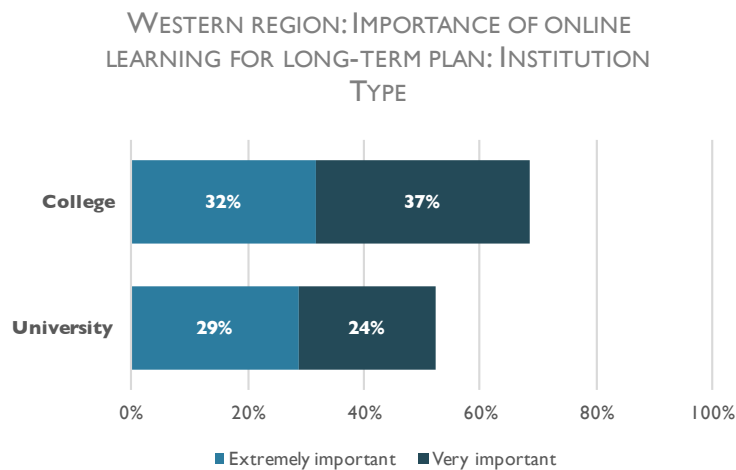
WESTERN REGION: IMPORTANCE OF ONLINE LEARNING FOR  
LONG-TERM PLAN





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 Western Canada, 69% of colleges reported that online learning was important for their long-term plan, compared to 53% of universities.

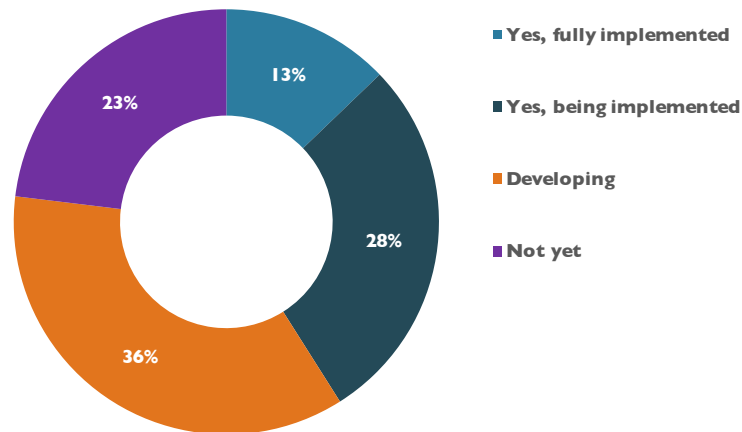




Nationally, the proportion of institutions that are implementing a plan to some extent remain a minority (42%).

Comparably, 41% of Western Canadian institutions reported that they implementing a plan to some extent. An additional 36% of institutions in Western Canada reported that they are developing a plan and 23% reported that they do not have a plan yet, but they acknowledged a need for one. None of the institutions in the Western provinces reported that a plan for e-learning was unnecessary.

WESTERN REGION: STATUS OF STRATEGIC PLAN FOR E-LEARNING





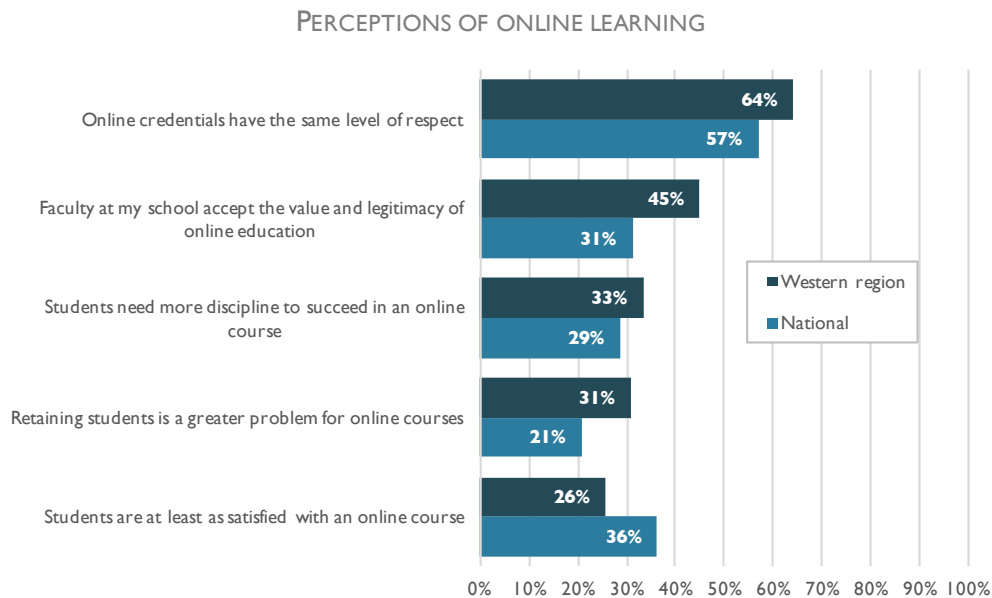
## PERCEPTIONS OF ONLINE LEARNING

***A greater proportion of institutions in Western Canada reported that faculty accept 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 Western Canada, a slightly greater proportion of responding institutions (64%) held this perception.

Compared to the national results, a greater proportion of Western Canadian institutions (45%) reported that faculty at their institution accepted the value and legitimacy of online education.

A greater proportion of institutions in Western Canada also reported that retaining students was a problem for online courses (31% compared to 21%, nationally) and fewer institutions (26% compared to 36%, nationally) reported that students were at least as satisfied with an online course.





## STRATEGIC IMPORTANCE OF ONLINE LEARNING

***In Western Canada, institutions consider online learning to be of strategic importance for increasing student access and to grow continuing and/or professional education.***

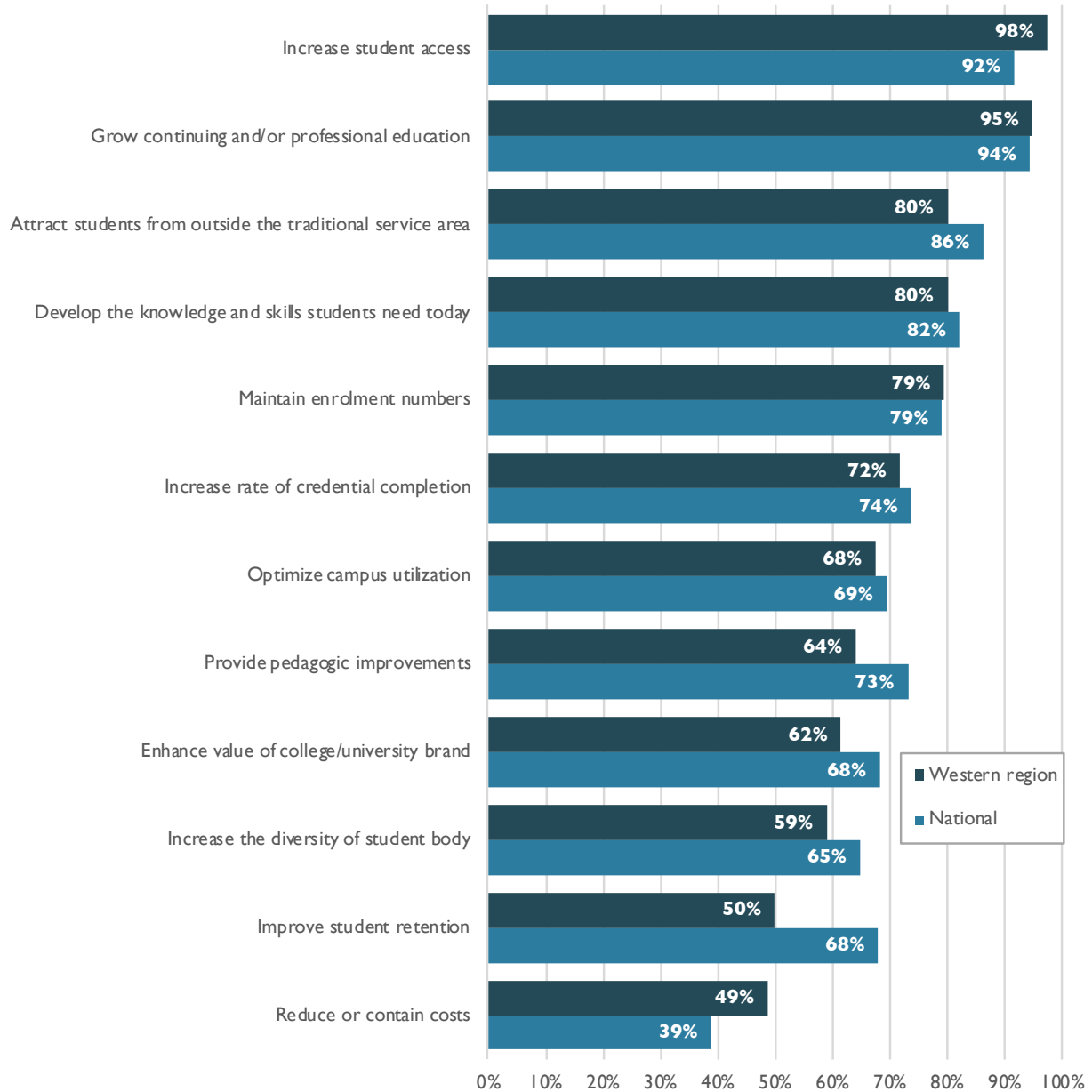
The survey provided institutions with a list of reasons why online learning may be important. Respondents were asked to select all that applied.

In Western Canada, the top two reasons were to increase student access (98%) and to grow continuing and/or professional education (95%). Other top reasons included to attract students from outside the traditional service area (80%), to develop the knowledge and skills that students need today (80%), and to maintain enrolment numbers (79%).

Overall, the reasons as to why online learning was strategically important for Western Canadian institutions remained similar to the national results. The one area where the results for the Western provinces and the national results differed concerned improving student retention. Fewer institutions in Western Canada (50%) reported this as being important compared to the national response (68%).



## STRATEGIC IMPORTANCE OF ONLINE LEARNING





## **BARRIERS TO THE ADOPTION OF ONLINE EDUCATION**

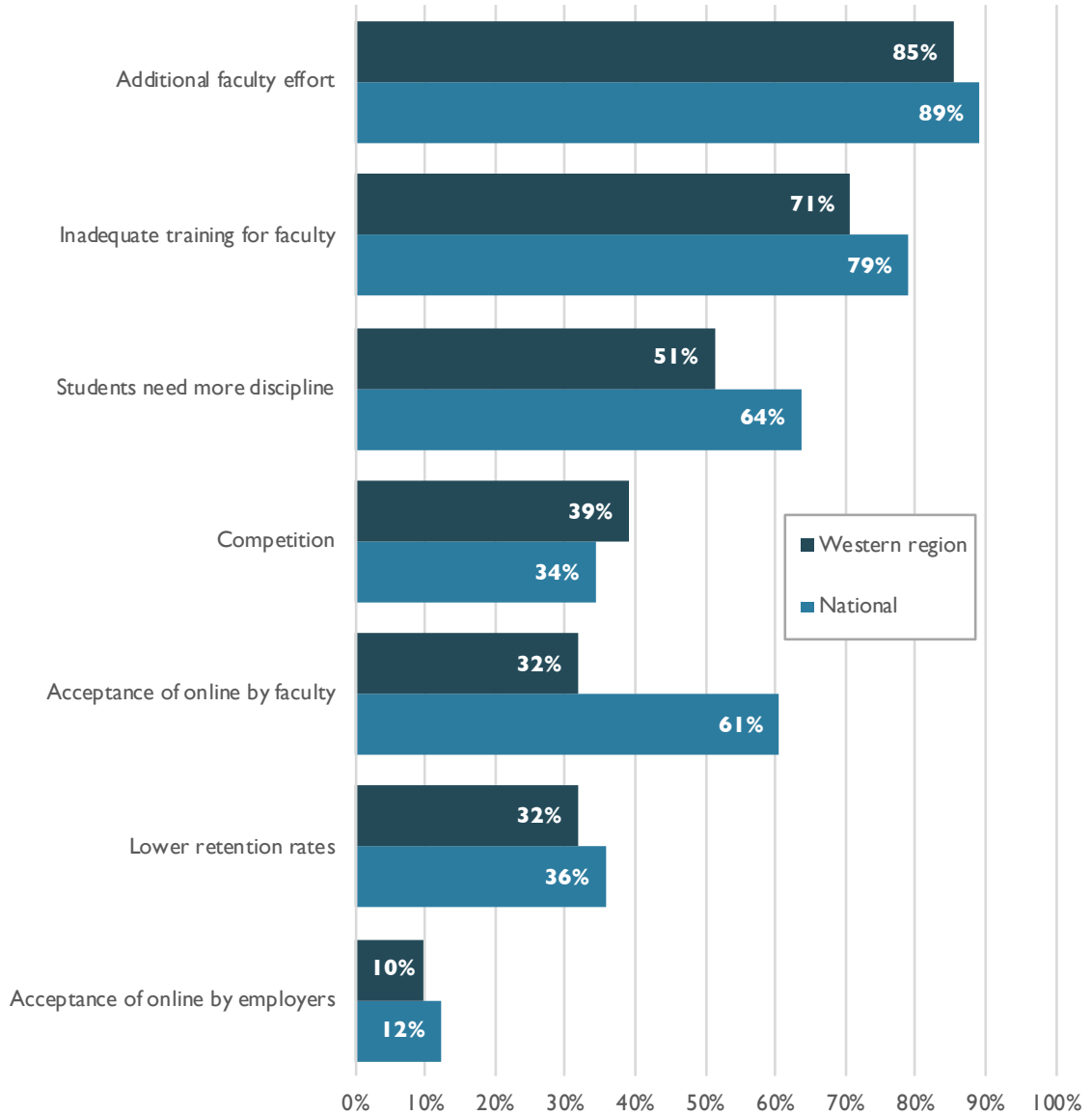
***In Western Canada the top barriers to the adoption of online learning were additional faculty effort and inadequate training for faculty.***

Nationally, the top barrier to the adoption of online education was the additional faculty effort required and this was also the top reported barrier for the Western region.

Compared to the national results, fewer institutions in Western Canada (51% compared to 64%, nationally) reported that students needing more discipline was a barrier. Further, considerably fewer institutions in Western Canada (32% compared to 61%, nationally) reported that acceptance of online learning by faculty was a barrier. Otherwise the Western Canadian and national results were relatively comparable, with differences being minor.



## BARRIERS TO ONLINE EDUCATION



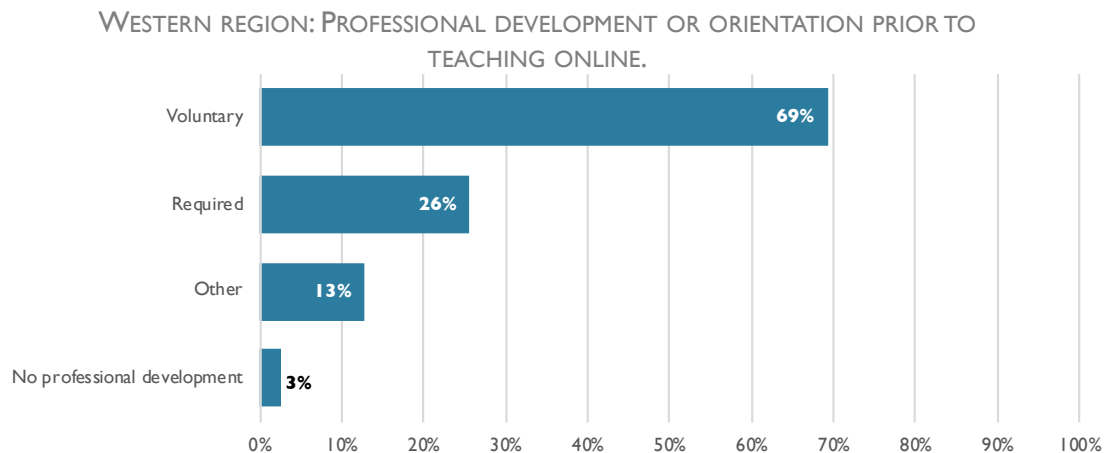




## PROFESSIONAL DEVELOPMENT

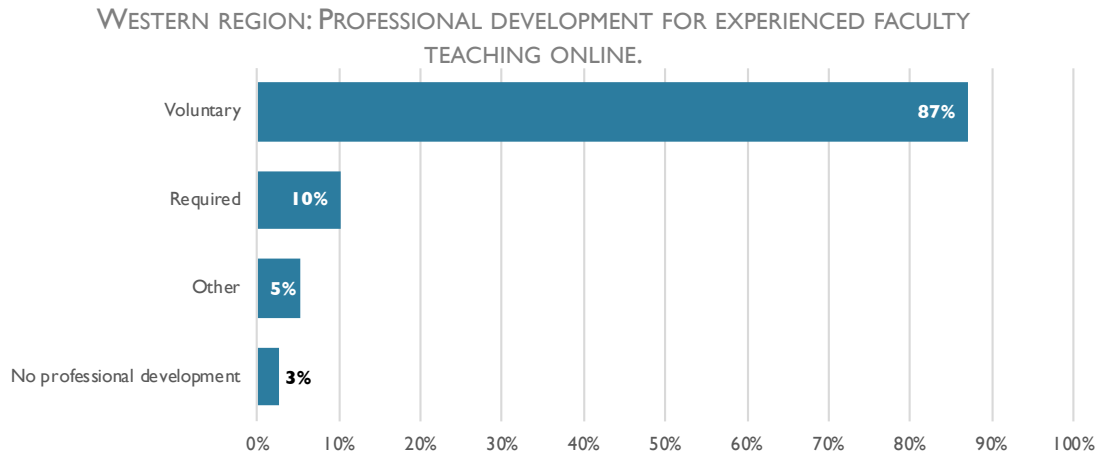
***Consistent with the national results, professional development before teaching online and for experienced online faculty remains mostly voluntary.***

The second-most common barrier to the adoption of online education reported by institutions in the Western region was inadequate training for faculty. In Western Canada, a higher proportion of institutions (69%) reported that they provide voluntary professional development opportunities for faculty before teaching online compared to the national average (58%). Only 3% of institutions reported that they did not offer any professional development before teaching online, compared to 11% nationally.





For experienced faculty teaching online, most (87%) institutions offer voluntary professional development; however, few institutions (10%) require professional development for experienced faculty.





## CONCLUSIONS

Online and blended learning is widespread across the Western provinces and the majority (91%) of post-secondary institutions in Western Canada offer online learning and continue to experience growth in online course enrolments.

Most institutions are implementing or developing a plan for e-learning and online learning is perceived to be of strategic importance primarily to increase student access and to grow continuing and/or professional education.

Institutions in Western Canada reported higher than average use of OER.

While perceptions of additional faculty effort and inadequate training for faculty who teach online were reported as the primary barriers to the adoption of online education, considerably fewer institutions in Western Canada reported that acceptance of online learning by faculty was a barrier, compared to the national results. Most institutions offer voluntary professional development for faculty that will, or do, teach online; however, only a minority of institutions require such training.

The most notable findings for Western Canada were the higher than average use of OER use and perceptions of greater acceptance of online learning by faculty, compared to the national-level results.





## 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.

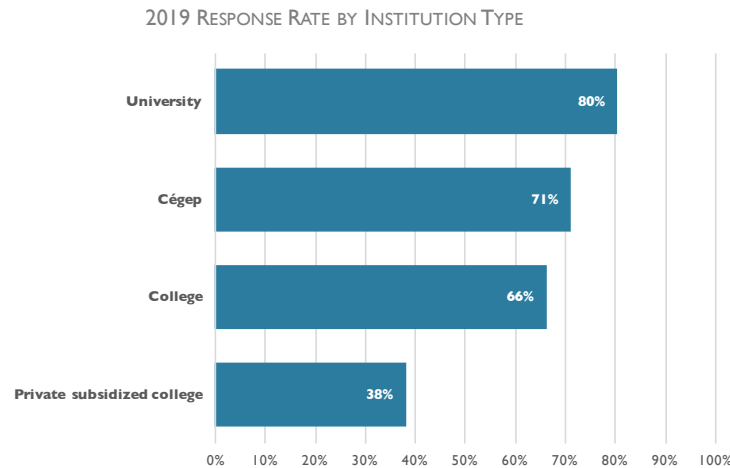
A survey invitation was sent to the Provost/VP Academic or Vice-President Education or Directeur général for each institution on the roster, with copies to the other institutional contacts. The questionnaire content was identical in both Anglophone and francophone versions of the questionnaire.

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.

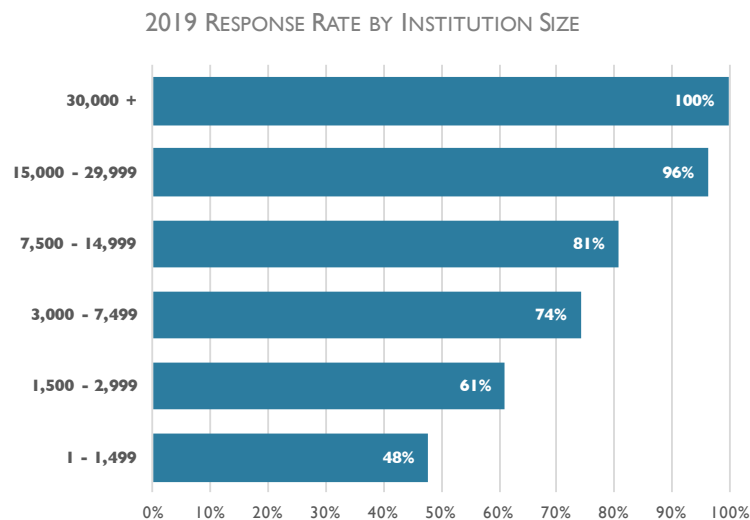




The overall institutional response rate was 70% for all types of institutions. Responses were highest from universities (80%) and lowest from the 21 private subsidised colleges in Québec (38%).



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.





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 Éducentre  
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 Régina  
North West Regional College  
Northlands College  
Parkland College  
Saskatchewan Polytechnic  
Southeast College  
University of Regina  
University of Saskatchewan

### **Yukon**

Yukon College





## CONTACT:

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