

Drivers and Barriers to Online Learning in Ontario

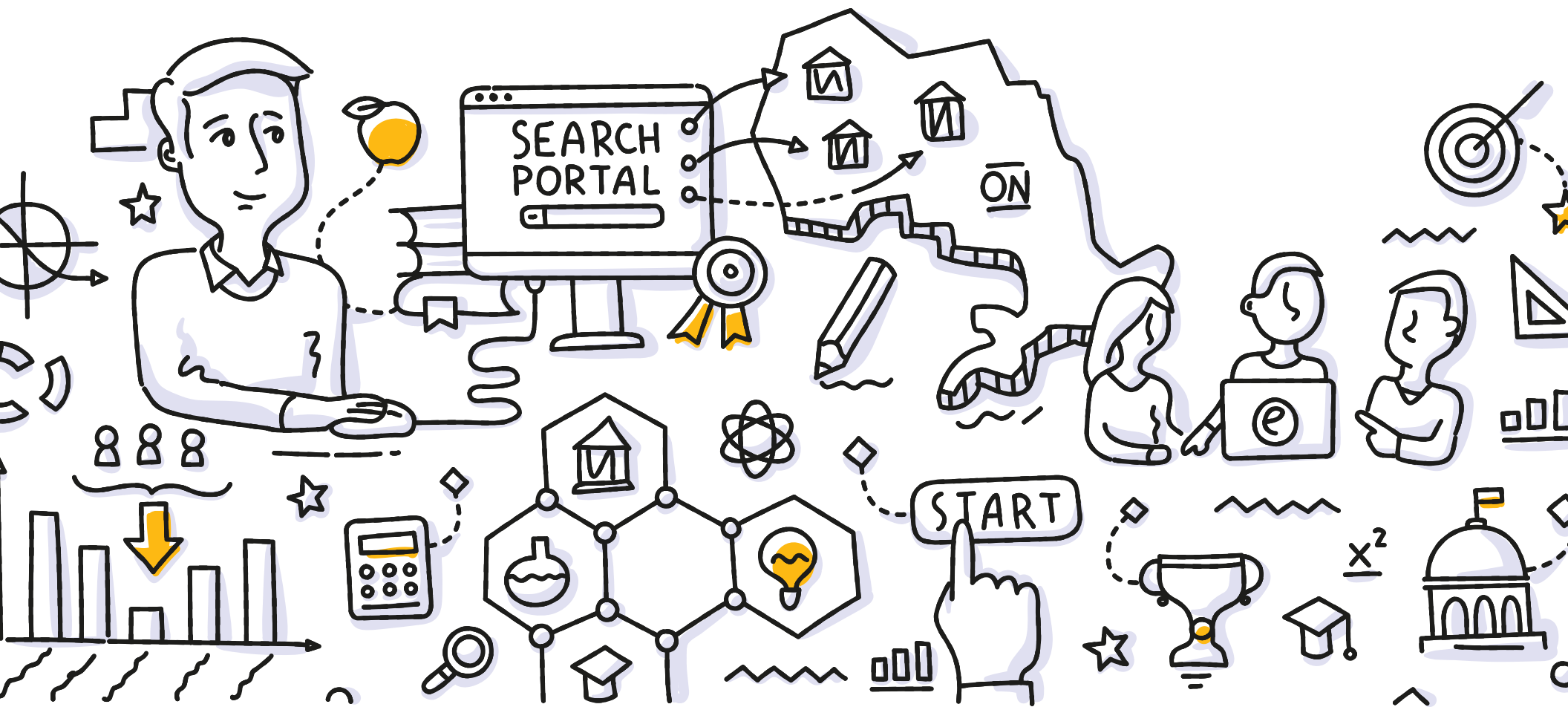


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Introduction

Post-secondary education is constantly evolving with the introduction of new concepts and technology. However, audiences have varying responses to the growth of online learning options and platforms. In an effort to learn more about the ways in which different people perceive online education and the eCampusOntario brand, we engaged Ipsos, a reputable market research firm to conduct a study on attitudes towards online education. By utilizing a comprehensive online survey, Ipsos was able to gather a wide variety of data that shed light on the status, growth and perception of online learning in Ontario.

Research Methodology and Key Metrics

In total, 1,050 Ontarians participated in Ipsos' poll, which was open from May 15-19, 2017. The entire sample of participants was categorized into the following subgroups:

- Current undergraduate students (aged 18-23): n=300
- Future students (aged 16-23): n=200
- Current graduate students (aged 22-30): n=200
- Professionals (aged 25-60): n=289
- Parents (aged 25-60): n=134/

*Category totals add up to more than 1,050 participants.

A credibility interval was used to measure the precision of the online poll: if every Ontarian from each subgroup had been surveyed, 19 times out of 20, the results would match the findings from the Ipsos poll, give or take 3.4 percentage points.

Executive Summary

The Ipsos poll revealed a wide array of information about Ontarians' attitudes towards online learning and gathered detailed data regarding the familiarity, favourability, trust, and advocacy that individuals have towards online education.

Overall, the poll demonstrated that Ontarians display a high degree of familiarity with online learning, although some individuals (ie. future post secondary students) are ill informed about the details and benefits of online education. Of all the Ipsos survey respondents, graduate students were the most familiar with online learning. This subgroup also exhibited a high opinion of online education as a whole; 53% of grad students stated that they would advocate for online learning or recommend it to a friend or colleague. On the other hand, professionals were most favourable towards online learning, making it clear that grad students and working professionals could potentially be the most receptive to eCampusOntario's online services and future marketing campaigns.

When asked about the eCampusOntario brand, many of the survey respondents stated that they were familiar with the organization. However, further questioning revealed that most of these individuals didn't actually know as much as they thought they did about eCampusOntario. This demonstrates a to direct future marketing resources towards raising awareness about eCampusOntario and it's benefits for students and professionals.

To round out the online poll, Ipsos conducted a behavioural science analysis. This analysis gathered a variety of useful data that exposed the main barriers encountered by Ontarians in their pursuit of online education. Four individual factors were studied: motivation, ability, physical context, and social context. The main results from the analysis are summarized below.

Motivation

While 81% of Ontarians feel that it is their personal responsibility to improve their education, 37% of individuals feel concerned that they may have anxiety about online education.

Ability

On average, ability was not a hugely negative factor in individuals' pursuit of online learning; over half of participants repeatedly stated that they felt able to pursue online education.

Physical Context

Individuals' physical context presented some barriers to their pursuit of online learning. While 80% of Ontarians stated that they had the technology and resources required for online learning, 42% stated that their work, family, or social life would make it challenging.

Social Context

On average, social context has the potential to affect individuals' pursuit of online education. Roughly half of Ontarians feel pressured to choose traditional forms of academia over online courses and programs due to normalization of the traditional campus and the stigmas associated with online learning.

Key Recommendations

To confront barriers, increase Ontarians' knowledge about eLearning, and raise awareness about the eCampusOntario brand, Ipsos provided a set of key recommendations based on the results of the entire online survey. These recommendations exist to help eCampusOntario properly target the most receptive audiences by efficiently making use of marketing and communications resources.

See page 27 to learn more about these recommendations and read the report's conclusion to learn about the ways in which eCampusOntario is acting on these recommendations.



Research Findings

The research conducted by Ipsos led way to detailed findings that gave eCampusOntario valuable insight into its relevant markets and target audiences. The main findings are individually identified below.

I. Participants' Familiarity with Online Learning

The Ipsos survey carefully gaged participants' familiarity with various components of online learning. In response, 75% of survey participants said they were familiar with the benefits and challenges of online learning and 68% knew where to go to find a list of programs. Unfortunately, respondents were less familiar with detailed information about online learning. Only 47% of individuals stated that they were familiar with the support services offered to online learners and only 50% of respondents said they knew how to transfer credits between institutions. Thus, Ontarians tend to be aware that eLearning exists, yet many don't fully understand online education. According to the Ipsos survey, grad students are among the most familiar with online learning. Undergrads and future students demonstrate low familiarity across the board.



	Familiar											
	Gender			Segments					Satisfaction with Current Job		Satisfaction with Career Thus Far	
	Total	Male	Female	Undergrads	Future Students	Grad Students	Professionals	Parents	Satisfied	Unsatisfied	Satisfied	Unsatisfied
Base: All Respondents (unwtd)	1050	435	615	300	200	200	289	134	526	140	654	207
The benefits and challenges of earning online	75%	76%	74%	78%L	62%	82%LO	79%LO	72%	80%	73%	79%	73%
Where to go to find a listing of all programs and courses offered by Ontario universities and colleges	68%	68%	67%	68%	65%	76%KLNO	68%	63%	73%	67%	71%	64%
The quality of programs and courses offered online	59%	62%	56%	58%L	46%	72%KLO	65%L	56%	70%o	53%	66%q	53%
The cost of online programs and courses	59%	61%	57%	65%LO	41%	74%KLNO	61%L	54%L	68%o	53%	66%q	54%
The breadth of programs and courses offered online	58%	62%C	54%	58%L	40%	72%KLNO	64%LO	54%L	69%o	51%	66%q	52%
Which colleges and universities offer online programs and courses	58%	60%	55%	59%L	42%	71%KLO	63%L	56%L	68%o	50%	66%q	50%
Credit transfer/accreditation recognition between colleges and universities	50%	56%C	44%	49%L	37%	66%KLNO	52%L	49%L	59%o	47%	56%q	47%
Support services offered to online students	47%	52%C	43%	51%L	35%	59%LN	48%L	48%L	56%o	41%	53%q	44%

Image 1: Familiarity with online learning

II. Participants' Favourability Towards Online Learning

When surveyed about favourability towards online learning, 33% of respondents indicated that they were favourable towards online education while 89% of respondents said they were favourable towards "traditional" campus learning (Image 1). Individuals who favoured online learning were most likely to do so because they viewed it as convenient and adaptable to their individual schedules (Image 3). Those surveyed appreciated the fact that online learning allows individuals to work at their own pace.

When Ontarians who did not favour online learning were asked why, 25% responded that it was because online education didn't allow them enough social interaction with teachers, while another 25% stated that online learning didn't offer them enough social interaction with peers (Image 4). Hence 50% of individuals who don't favour online learning dislike it because they place value on peer-to-peer social interaction. Increased awareness about new and advanced eLearning practices and up-and-coming technologies could increase favourability, especially with young individuals who require social stimulation.

	Favourability												
	Gender			Segments					Region		Familiarity		
	Total	Male	Female	Undergrads	Future Students	Grad Students	Professionals	Parents	GTA	Outside GTA	High	Moderate	Low
Base: All Respondents (unwtd)	1050	435	615	300	200	200	289	134	535	515	174	457	419
A traditional campus-setting program or course	89%	89%	88%	90%N	95%MN	88%	82%	90%N	91%J	86%	85%	87%	92%bc
A blended form of learning in a campus setting and online	85%	86%	84%	85%	87%	82%	86%	93%KMN	85%	86%	93%cd	84%	84%
An online program or course	77%	77%	77%	71%	73%	79%	87%KLMO	74%	76%	78%	87%cd	79%d	71%

Image 2: Favourability

	Gender			Segments				
	Total	Male	Female	Undergrads	Future Students	Grad Students	Professionals	Parents
Base: All Respondents (unwtd)	808	334	474	213	145	159	252	100
Positive (Net)	73%	71%	75%	69%	73%	68%	82%KLMO	72%
Easier/ more convenient	19%	20%	19%	19%	18%	18%	21%	16%
Works with student's schedule	16%	14%	19%B	14%	10%	18%	21%KLO	12%
Can study at your own pace	14%	13%	15%	19%MO	17%O	11%	12%	7%
Can maintain a full-time/ part-time job	12%	9%	15%B	4%	8%	12%	20%	10%
Don't need to attend in person/ can do it from home	9%	8%	9%	12%MO	7%	5%	10%O	4%
Ease of access/ accessible from anywhere/ anytime	8%	7%	10%	10%	9%	9%	6%	8%
Don't need to travel/ relocate	8%	8%	7%	6%	10%M	4%	9%M	12%M
Like it/ it's a good option/ suits my needs	8%	7%	8%	5%	9%	8%	9%	9%
Flexibility (unspecified)	6%	5%	6%	4%	5%	6%	7%	8%
Other positive mentions	6%	7%	4%	7%	2%	5%	7%	9%
Negative (Net)	19%	14%	24%	26%	24%MNO	15%N	13%	14%
Online courses lack interaction/ direct contact with a teacher/ teacher support	5%	3%	8%B	9%	7%NO	5%N	2%	3%
Online courses lack the benefits of social interaction/ working with students	4%	3%	5%	3%	7%	3%	5%	2%
Prefer/ like a traditional/ classroom/ in-person setting	4%	4%	4%	4%	6%M	1%	4%	4%
Students can learn/ apply themselves better in a classroom setting	4%	2%	6%	9%	3%	2%	2%	1%
Miscellaneous (Net)	16 %	13%	18%B	20%	15%	13%	13%	17%
Currently taking/ have taken online courses before	5%	2%	8%	7%	4%	3%	7%	4%
Other	5%	6%	5%	6%	6%	7%	3%	4%
Don't know	7%	9%	4%	8%	6%	12%	3%	5%

Image 3: Reasons for being favourable

	Gender			Segments				
	Total	Male	Female	Undergrads	Future Students	Grad Students	Professionals	Parents
Base: All Respondents (unwtd)	242	101	141	87	55	41	37	34
Negative (Net)	87%	81%	93%B	87%	98%KMNO	74%	82%	84%
Online courses lack interaction / direct contact with a teacher / teacher support	25%	14%	37%B	32%NO	34%NO	22%	9%	13%
Online courses lack the benefits of social interaction/ working with students	25%	20%	30%B	24%	37%M	13%	29%	19%
Students can learn/ apply themselves better in a classroom setting	22%	20%	23%	20%	18%	21%	26%	29%
Prefer/ like a traditional/ classroom/ in-person setting	18%	17%	18%	18%	20%	13%	15%	15%
Requires self discipline/ not self-motivated enough for online programs/ in class is more motivating	9%	4%	14%	13%	10%	9%	2%	2%
Online courses offer a lower quality of education/ a classroom offers a better/ more enriching experience	7%	6%	8%	6%	3%	13%	8%	6%
Online courses are more difficult/ confusing experience/ more work	4%	2%	6%	3%	7%	5%	5%	6%
Online courses are too expensive/ poor value for the money	4%	2%	6%	7%L	-	5%	3%	-
Safety/ fraud/ abuse issues with online courses	4%	5%	2%	5%	2%	5%	3%	3%
Other negative mentions	10%	12%	7%	9%	9%	10%	14%	5%
Positive (Net)	4%	5%	3%	4%	-	12%L	3%	3%
Miscellaneous (Net)	9%	8%	9%	8%	9%	4%	14%	12%
Currently taking/ have taken online courses before	4%	3%	4%	4%	7%	2%	3%	-
Don't know	8%	11%	6%	11%L	-	18%L	9%L	3%

Image 4: Reasons for being unfavourable



III. Participants' Perceptions of Online Learning

Ipsos also surveyed Ontarians to find out more about their overall perceptions of online learning (Image 5). Over half of survey respondents perceived online learning programs to be convenient and accessible, however, only 34% of individuals perceived online learning as a tool that could offer close contact with fellow students. Additionally, a mere 41% of respondents perceived online education as something that is able to ready students for the workforce, despite the advancement of unique online learning tools that are able to bridge the gap between education and work experience, such as Riipen. This indicates that greater awareness must be raised about the recent advancements in online learning that enable students to communicate with online peers and gain experience before graduation.

The Ipsos study also asked participants to compare the traditional campus experience to the online campus experience (Image 6). Individuals rated the overall learning experience of the traditional campus as higher than that of an online course or program. However, online learning scored higher than the traditional campus in five notable areas including overall experience for part-time students, easy access, convenience, ability to pursue a program or course at one's own pace, and ability to access course materials online. Thus, the flexibility and accessibility of online learning were revealed to be its two main strengths.

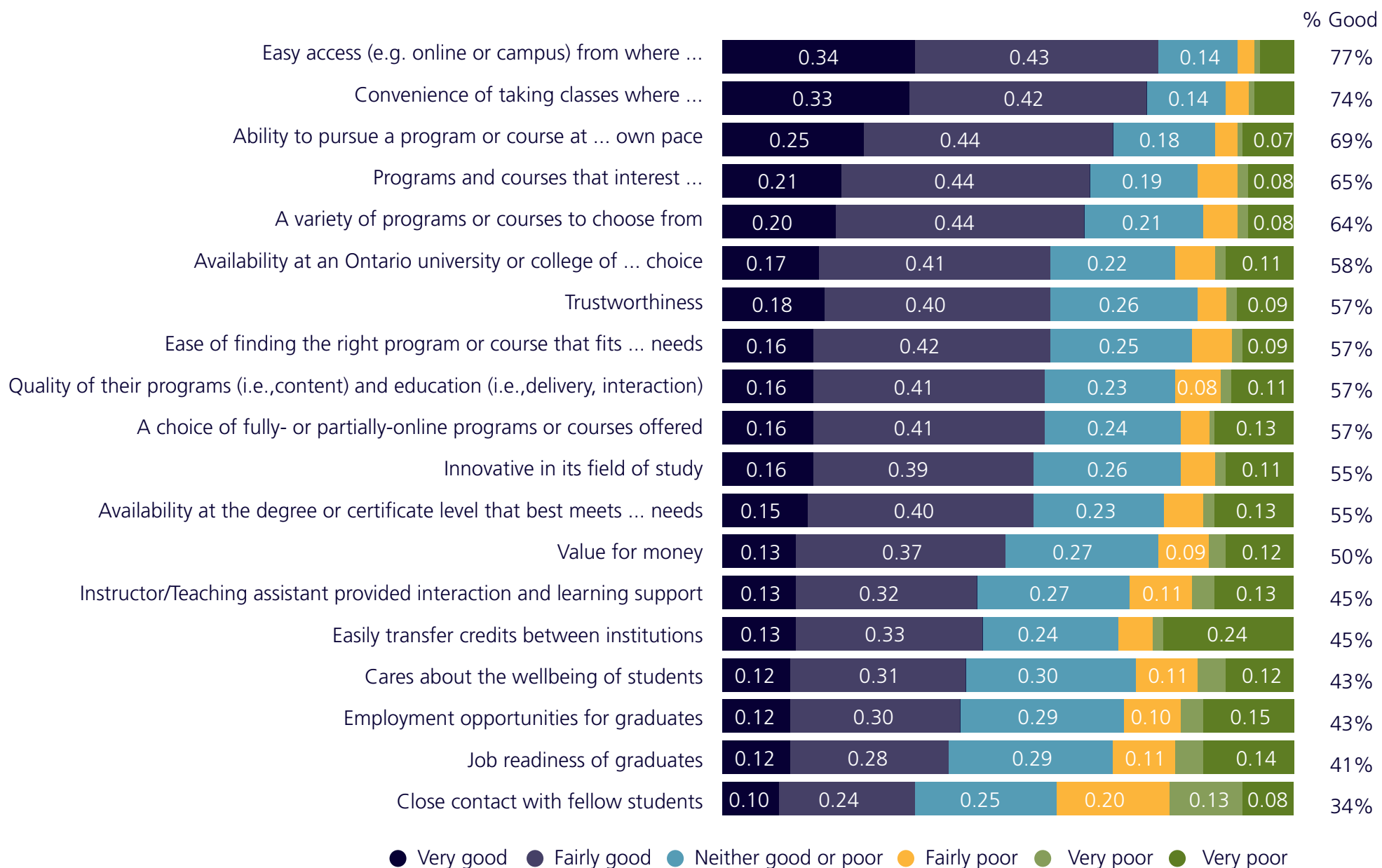


Image 5: Perceptions of Online Study Programs/Courses

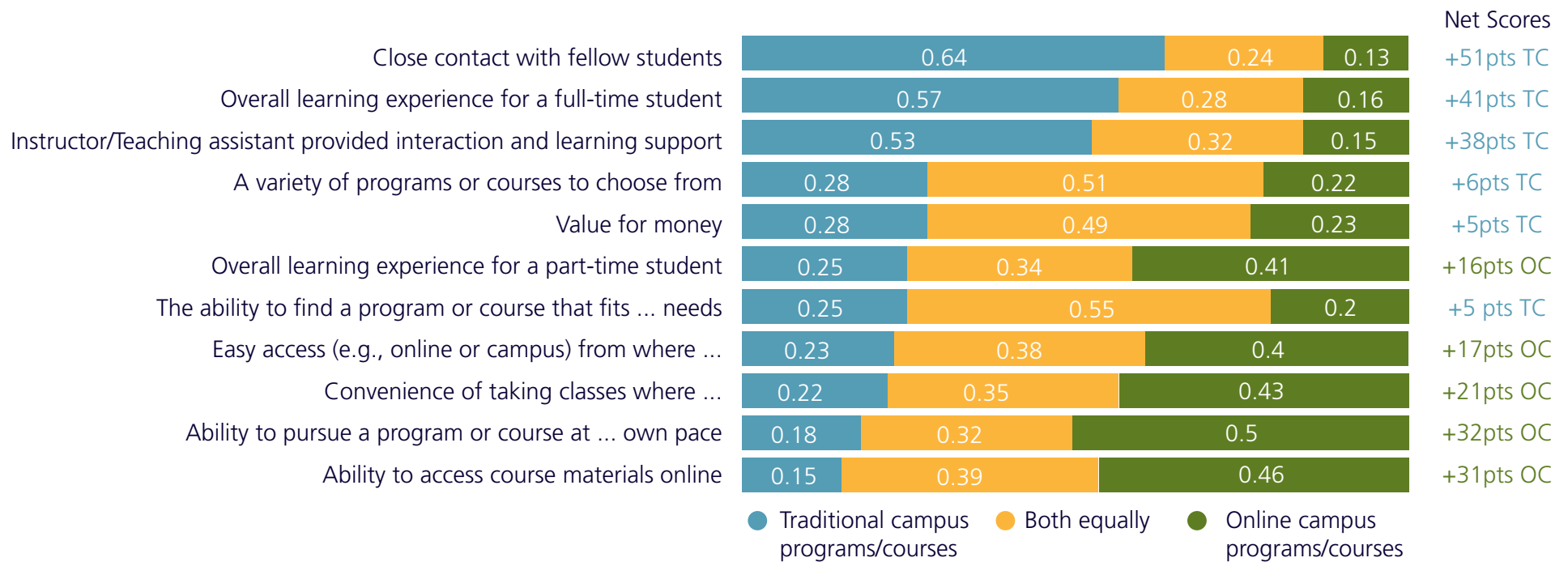
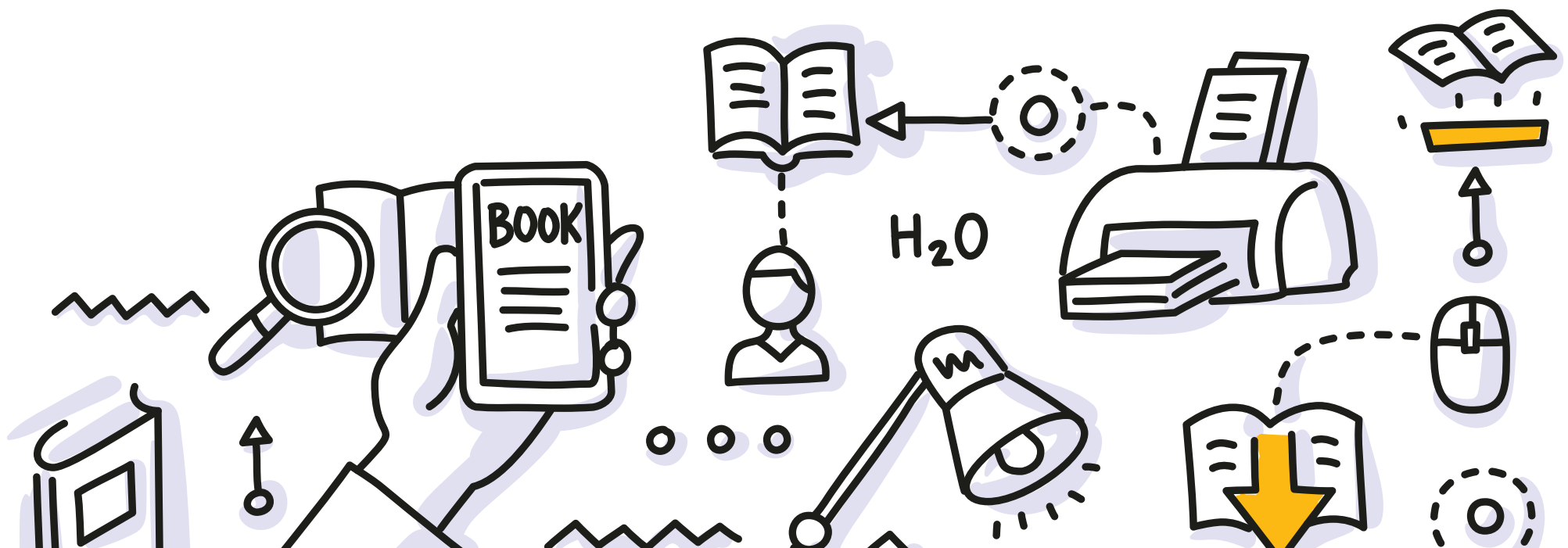


Image 6: Head-to-head: traditional campus vs. online



IV. Participants' Likelihood to Advocate for Online learning

When survey respondents were asked about their likelihood to advocate for online learning, 38% said they would advocate for it, including 26% who said they would speak highly of it if someone asked their opinion. Meanwhile, 45% of respondents were neutral to the question, 9% chose not to express an opinion, and 10% said they would be critical of online courses and programs (2% without being asked). Unsurprisingly, of all participant subcategories, graduate students were the most likely to advocate for online learning, with 53% of grad students stating that they were likely to advocate for it. This could be due to the fact that most graduate students have had some form of previous experience with online courses and programs.

	Advocate														
	Gender			Segments					Familiarity			Satisfied with Current Job		Satisfied with Career Thus Far	
	Total	Male	Female	Undergrads	Future Students	Grad Students	Professionals	Parents	High	Moderate	Low	Satisfied	Unsatisfied	Satisfied	Unsatisfied
Base: All Respondents (unwtd)	1050	435	615	300	200	200	289	134	174	457	419	526	140	654	207
Top 2 Box	38%	43%C	32%	31%	25%	53%KLO	46%KL	40%L	71%cd	43%d	17%	47%o	37%	42%	36%

Image 7: Advocacy

V. Participants' Likelihood to Apply for Online Courses/Programs

Various factors drive student applications for online learning (Image 8). According to the Ipsos survey, the two main driving factors are trustworthiness of an online course or program and job readiness of graduates. These have the greatest influence over someone who is considering applying to an online course or program. The third most important driving factor is whether or not individuals will be in close contact with fellow students.

When respondents were asked about whether or not they were likely to apply for an online course or program in the next two years, 24% said they were very likely to apply (Image 9). Among those who expressed high familiarity with online learning, 51% said they were very likely to apply within two years. Of all respondents, grad students were the most likely to apply to an online course or program, perhaps because they require increased flexibility or tend to show more familiarity towards online learning than undergrads.

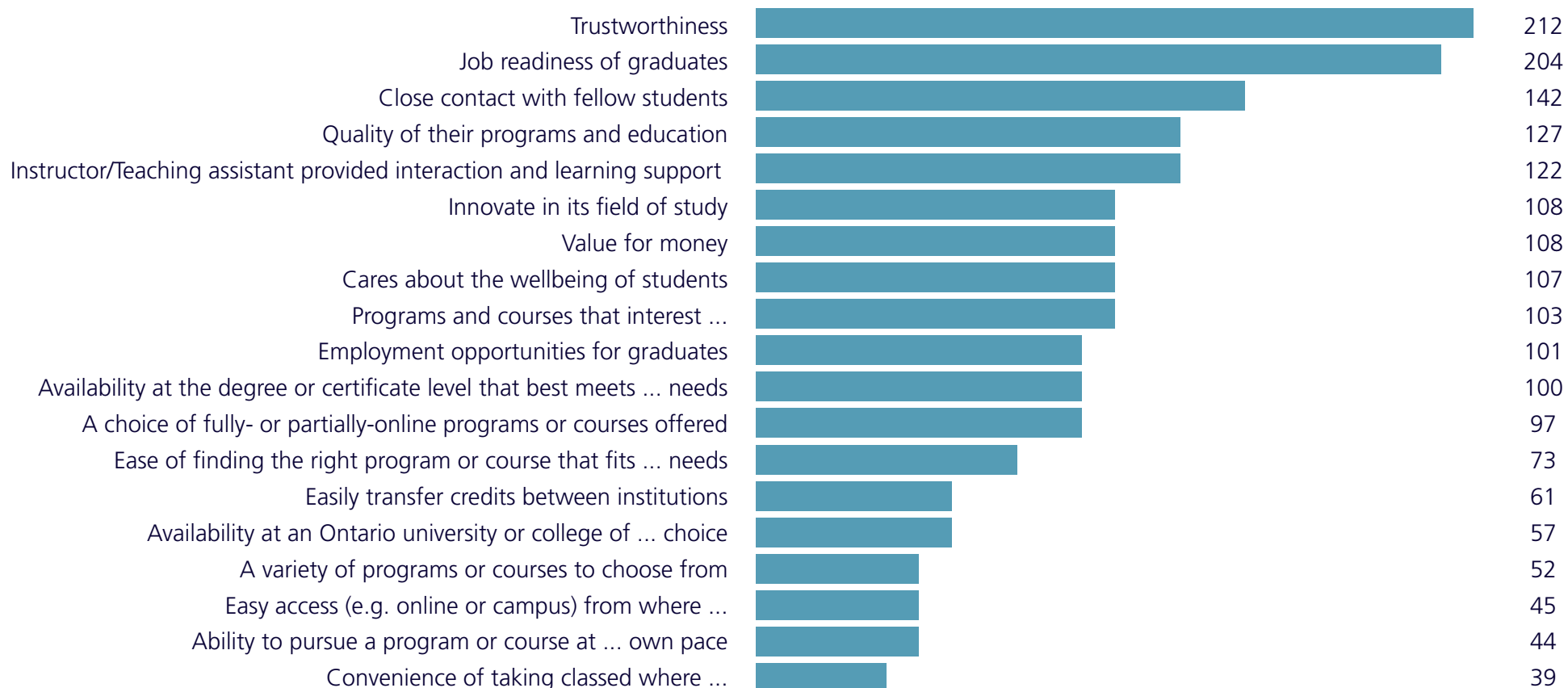


Image 8: What Drives Applications for online learning?

	%Likely										
	Gender				Segments				Familiarity		
	Total	Male	Female	Undergrads	Future Students	Grad Students	Professionals	Parents	High	Moderate	Low
Base: All Respondents (unwtd)	1050	435	615	300	200	200	289	134	174	457	419
%Very/Somewhat Likely	68%	71%C	65%	60%	55%	76%KL	80%KLO	71%KL	84%cd	74%d	55%
%Very Likely	24%	25%	23%	19%	15%	34%KL	29%KL	31%KL	51%cd	24%d	12%

Image 9: Likelihood to Apply

VI. Participants' Reasons for Pursuing an Online Study Program

Respondents gave various reasons for considering pursuing an online study program (Image 10). Of all individuals, 44% said they would consider it to advance their career or their child's career, while 44% said they would consider an online study program for its convenience. Hence, working professionals view online study programs as a vital resource and the convenience factor of eLearning encourages busy or remotely-located individuals to pursue their degrees online.

	Gender			Segments					Familiarity		
	Total	Male	Female	Undergrads	Future Students	Grad Students	Professionals	Parents	High	Moderate	Low
Analyzed Respondents : Likely To Apply To Online Program/Course	709	309	400	181	110	149	232	94	146	336	227
To advance ... career by learning new skills	44%	43%	46%	32%	29%	48%KL	59%KLMO	35%	55%cd	43%	39%
For convenience - to balance life, work and study commitments	44%	39%	51%B	48%N	53%N	46%	36%	42%	43%	46%	42%
To help ... find a job	30%	36%C	25%	24%	39%KN	38%KN	26%	35%	39%cd	27%	29%
For the pleasure of learning	26%	26%	26%	25%	24%	21%	32%MO	22%	32%	24%	24%
Better affordability compared to traditional campus-based programs or courses	20%	22%	19%	13%	35%KMN	21%	17%	28%KN	19%	21%	20%
To complete credits missing from a study program or course ... already begun	19%	19%	20%	31%LMN	13%	21%N	13%	20%N	19%	21%	17%
For access - no universities or colleges near where ...	11%	10%	12%	11%N	17%N	14%N	6%	12%N	15%	10%	10%
Some other reason	7%	6%	9%	13%MN	8%M	2%	4%	8%M	4%	6%	10%b

Image 10: Reasons for pursuing an online study

VII. Helpful Info for Online Learning Programs

The Ipsos study also asked participants about the kind of info that they would like to receive if they were applying to an online course or program (Image 11). While 17% of individuals indicated that they would like to have access to information regarding cost and financing, an even greater number of individuals were unsure about what kind of info they wanted to receive. Hence, there was no overarching response to this question. Ontarians simply want a broad array of information that is easily accessible and available online.

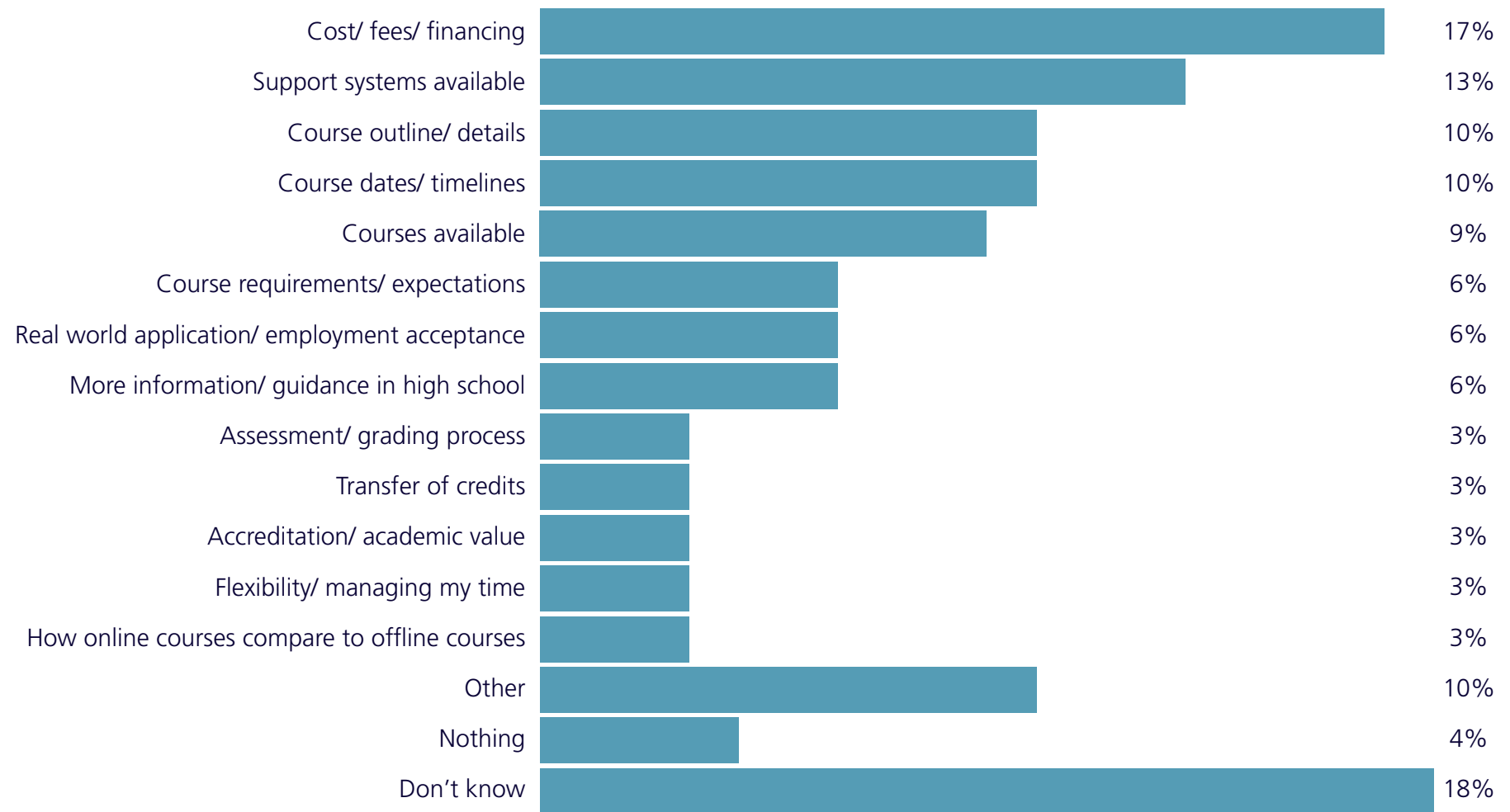
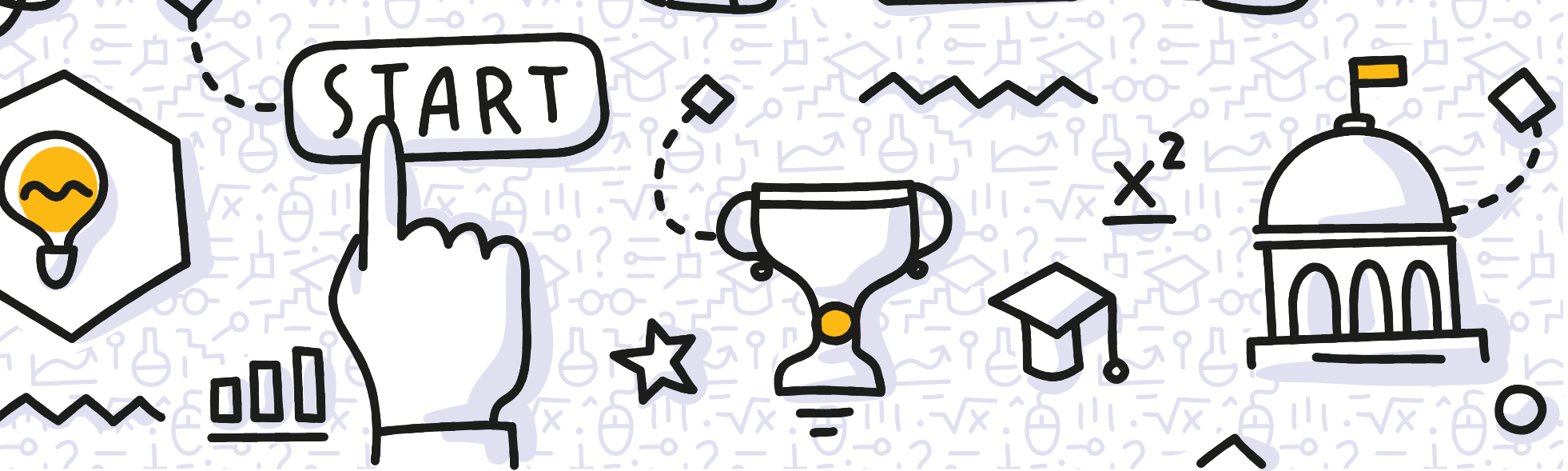


Image 11: Helpful info for online learning programs



VIII. Participants' Familiarity with the eCampusOntario Brand

The Ipsos survey also gaged participants' familiarity with the eCampusOntario brand (Image 12). Of all respondents, 26% initially stated that they were familiar with the brand and 74% of individuals were unfamiliar with the brand. After receiving a helpful description of what eCampusOntario is, only 25% of survey respondents stated that they were familiar with eCampusOntario, while 75% of respondents said they were unfamiliar with the company. Furthermore, 72% of participants said they have never had a direct interaction with the brand or its services. Of all subgroups, grad students displayed the most familiarity with the brand as a whole and also claim to have interacted with it most.

When asked about the value of eCampusOntario's services, individuals gave fairly positive responses (Image 13). Roughly 80–90% of participants viewed eCampusOntario's services as valuable to students. Of all participant subgroups, professionals saw the most value in eCampusOntario's offerings, particularly in terms of online course registration and the ability to access information on how to study online (Image 14).

	Familiar							
	Gender			Segments				
	Total	Male	Female	Undergrads	Future Students	Grad Students	Professionals	Parents
Base: All Respondents (unwtd)	1050	435	615	300	200	200	289	134
Top 2 Box	25%	29% ^C	20%	24%	17%	42% ^{KLNO}	23%	26%

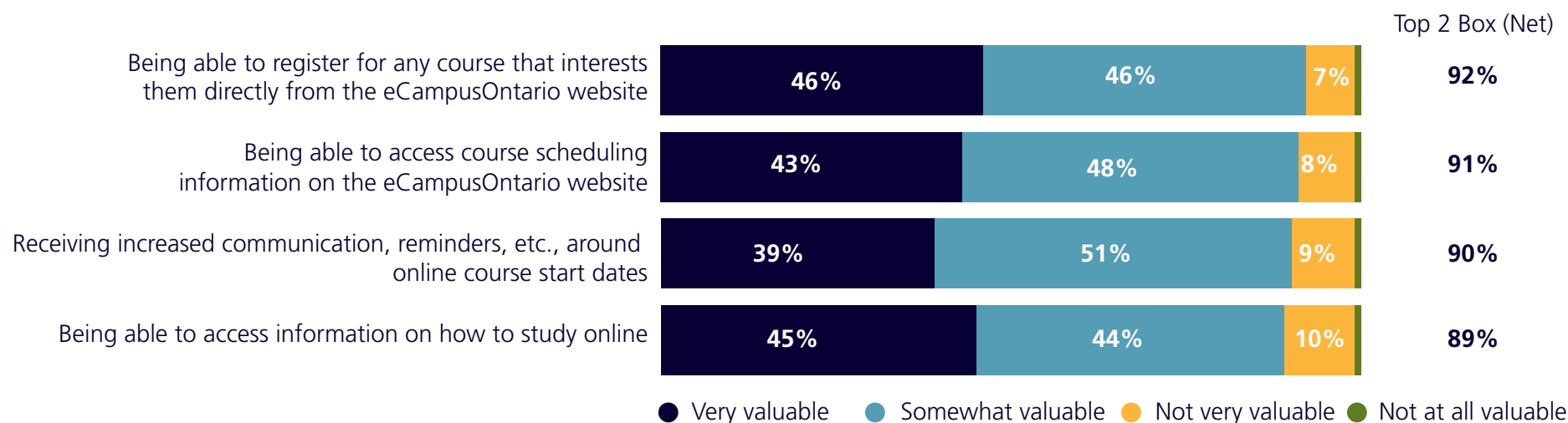


Image 13: Value of Services

	%Valuable							
	Gender			Segments				
Analyzed Respondents : Familiar With eCampusOntario	Total	Male	Female	Undergrads	Future Students	Grad Students	Professionals	Parents
	480	242	238	117	81	120	144	67*
Being able to register for any course that interests them directly from the eCampusOntario website	92%	93%	91%	88%	96%	88%	96%KM	94%
Being able to access course scheduling information on the eCampusOntario website	91%	91%	92%	88%	95%	89%	94%	89%
Receiving increased communication, reminders, etc., around online course start dates	90%	88%	92%	86%	92%	88%	93%	92%
Being able to access information on how to study online	89%	88%	90%	84%	89%	85%	96%KM	92%

Image 14: Value of Services



Behavioural Science Analysis

As part of the main online poll, Ipsos conducted a Behavioural Science Analysis that surveyed participants' behaviours and used their responses to gauge the motivation, ability, physical context, and social context behind their respective opinions of online learning. The information was then used to address the various barriers that individuals face in the pursuit of online education. Each main portion of the Behavioural Science Analysis is conveniently broken down in the following subsections.

I. Motivation

Individuals' motivation to pursue online learning is complicated by a few different factors (Image 15). While 81% of survey participants recognized their personal responsibility to improve their education and 74% of individuals make a habit of doing things online, 37% of respondents were concerned that they may have anxiety towards online learning. Thus, someone who may or may not display confidence towards online platforms could still show hesitation towards online education, possibly because they aren't fully aware of how online education functions in various contexts.

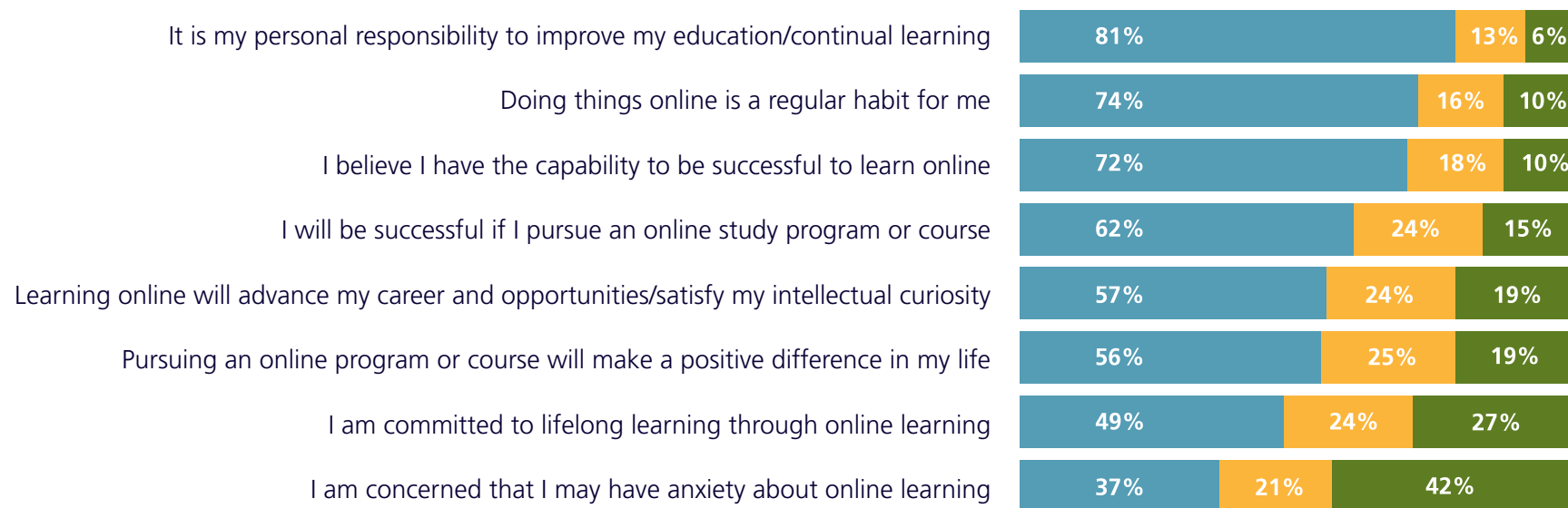


Image 15: Behavioural Science Analysis: Motivation

● Top 3 Box (Net) ● 4 ● Bottom 3 Box (Net)

II. Ability

Most survey respondents felt able to pursue online education (Image 16). When individuals were asked about their physical ability (eye sight, posture, etc.) to study online, 80% stated that they were physically able. As well, a majority of participants saw themselves as being able to learn online, access online resources, and self-regulate learning habits. Thus, Ontario learners' ability to study online is unquestionably high.

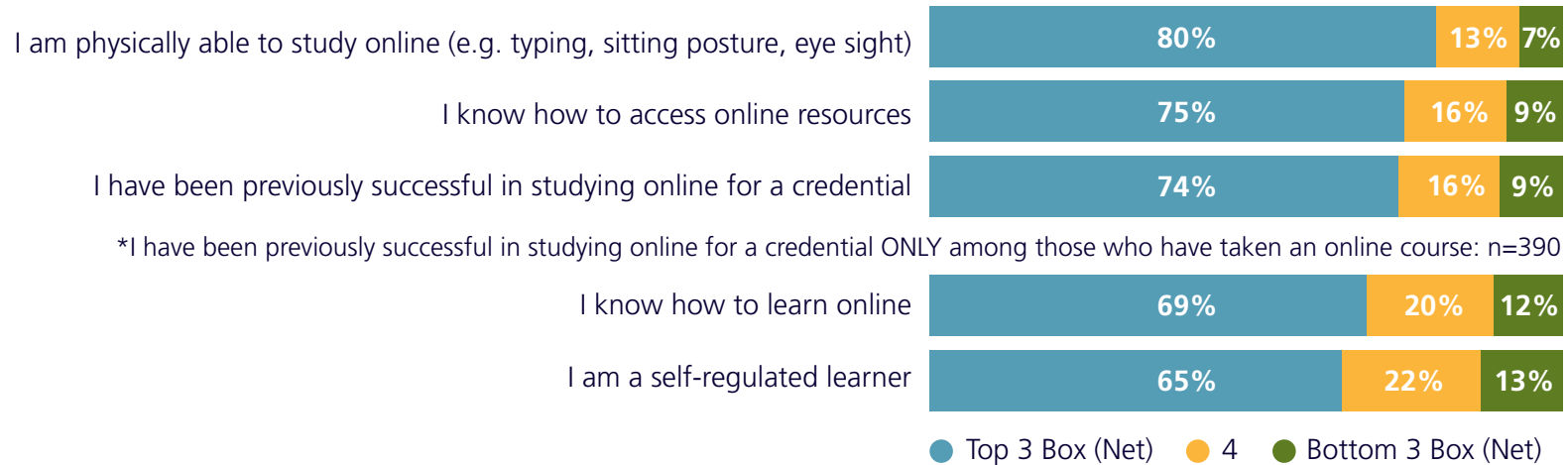


Image 16: Behavioural Science Analysis: Ability

III. Physical Context

Physically, 80% of individuals said they had the technology (ie. a computer, internet connection, and study space) required to complete an online course or program but 42% of respondents agreed that work, social life or family would make it challenging to study online (Image 17). However, it is likely that these respondents would encounter even more barriers to learning if they were to pursue education at a "traditional" campus, meaning online learning is still a competitive and convenient option, even with these barriers in place.

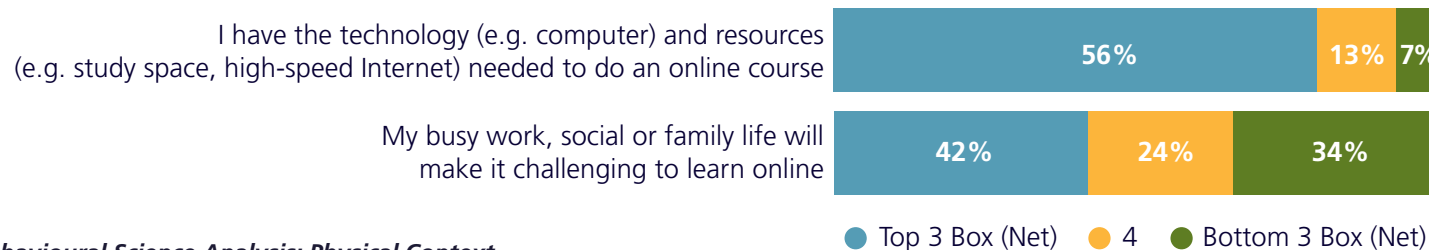


Image 17: Behavioural Science Analysis: Physical Context

IV. Social Context

Online learning did not score incredibly high when it came to social context (Image 18). Only half of respondents agreed that the social perception of online learning is a positive option for learning, while 56% of respondents stated that employers may not view online credentials as equal in quality to traditional campus credentials. Furthermore, 50% of individuals agreed that their friends and family encouraged them to pursue traditional campus education as opposed to online education. Thus, the analysis of social context exposed the stigmas and insecurities that Ontarians have towards online learning.

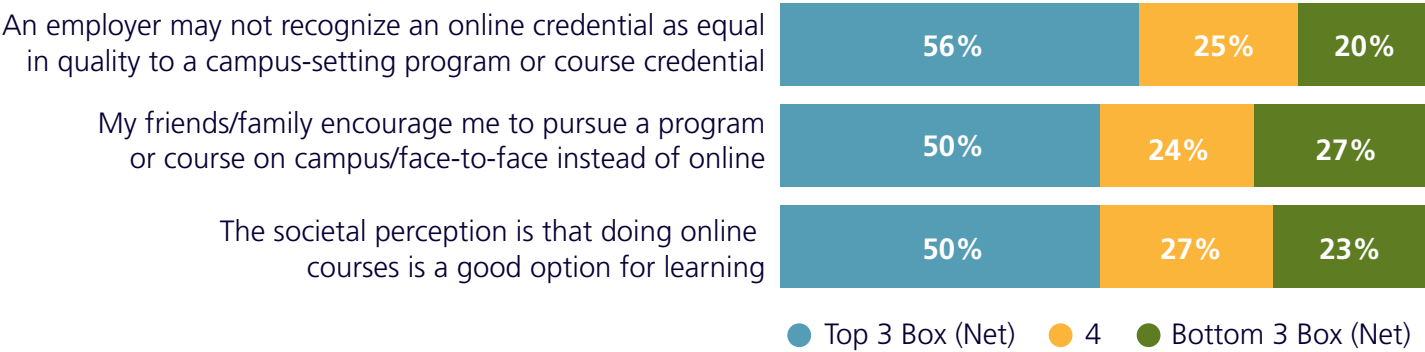


Image 18: Behavioural Science Analysis: Social Context

V. Barriers and Challenges Towards Online Learning

The results of the Behavioural Science Analysis revealed the various barriers and challenges of online learning in Ontario. To understand these barriers, Ipsos took participants’ responses to the analysis and examined their likelihood of negatively influencing an online application (Image 19). In the image on the next page, primary barriers are bold.

The barriers to online learning are largely motivational, not related to ability or physical context. Specifically, while there is some skepticism that one would be successful if they were to pursue an online study program or course, many are also skeptical that online learning will advance their career/ opportunities, and will make a positive difference in their lives. Others say they’re simply not committed to lifelong learning through an online means. These are all correlated with intention to apply for online courses/programs.

MAPS Identification	MAPS Behavioural Statements	%Agree with statement	Likelihood to Apply Correlation
Motivation (Social Role)	It is my personal responsibility to improve my education/continual learning	81%	0.130
Ability Physical	I am physically able to study online (e.g. typing, sitting posture, eye sight)	80%	0.083
Physical Context (Accessibility)	I have the technology (e.g. computer) and resources (e.g. study space, high-speed Internet) needed to do an online course	80%	0.050
Ability Psychological (Knowledge)	I know how to access online resources	75%	0.130
Motivation (Habit)	Doing things online is a regular habit for me	74%	0.175
Motivation (Beliefs Capable)	I believe I have the capability to be successful to learn online	72%	0.358
Ability Psychological (Knowledge)	I know how to learn online	69%	0.283
Ability Psychological (Behavioural Regulation)	I am a self-regulated learner	65%	0.268
Motivation (Optimism)	I will be successful if I pursue an online study program or course	62%	0.416
Motivation (Goals)	Learning online will advance my career and opportunities/satisfy my intellectual curiosity	57%	0.518
Motivation (Beliefs Consequence)	Pursuing an online program or course will make a positive difference in my life	56%	0.489
Social Context (Issue Concerns)	An employer may not recognize an online credential as equal in quality to a campus-setting program or course credential	56%	-0.090
Social Context (Social Support Circle)	My friends/family encourage me to pursue a program or course on campus/face-to-face instead of online	50%	0.003
Social Context (Social Norms)	The societal perception is that doing online courses is a good option for learning	50%	0.439
Motivation (Reinforcement)	I am committed to lifelong learning through online learning	49%	0.445
Ability Psychological (Memory)	I have been previously successful in studying online for a credential	48%	0.282
Physical Context (Time)	My busy work, social or family life will make it challenging to learn online	42%	0.061
Motivation (Emotion)	I am concerned that I may have anxiety about online learning	37%	0.086

Image 19: Barriers and Challenges to online study programs

Ipsos Recommendations

When the Ipsos study reached its completion, eCampusOntario was provided with five key recommendations:

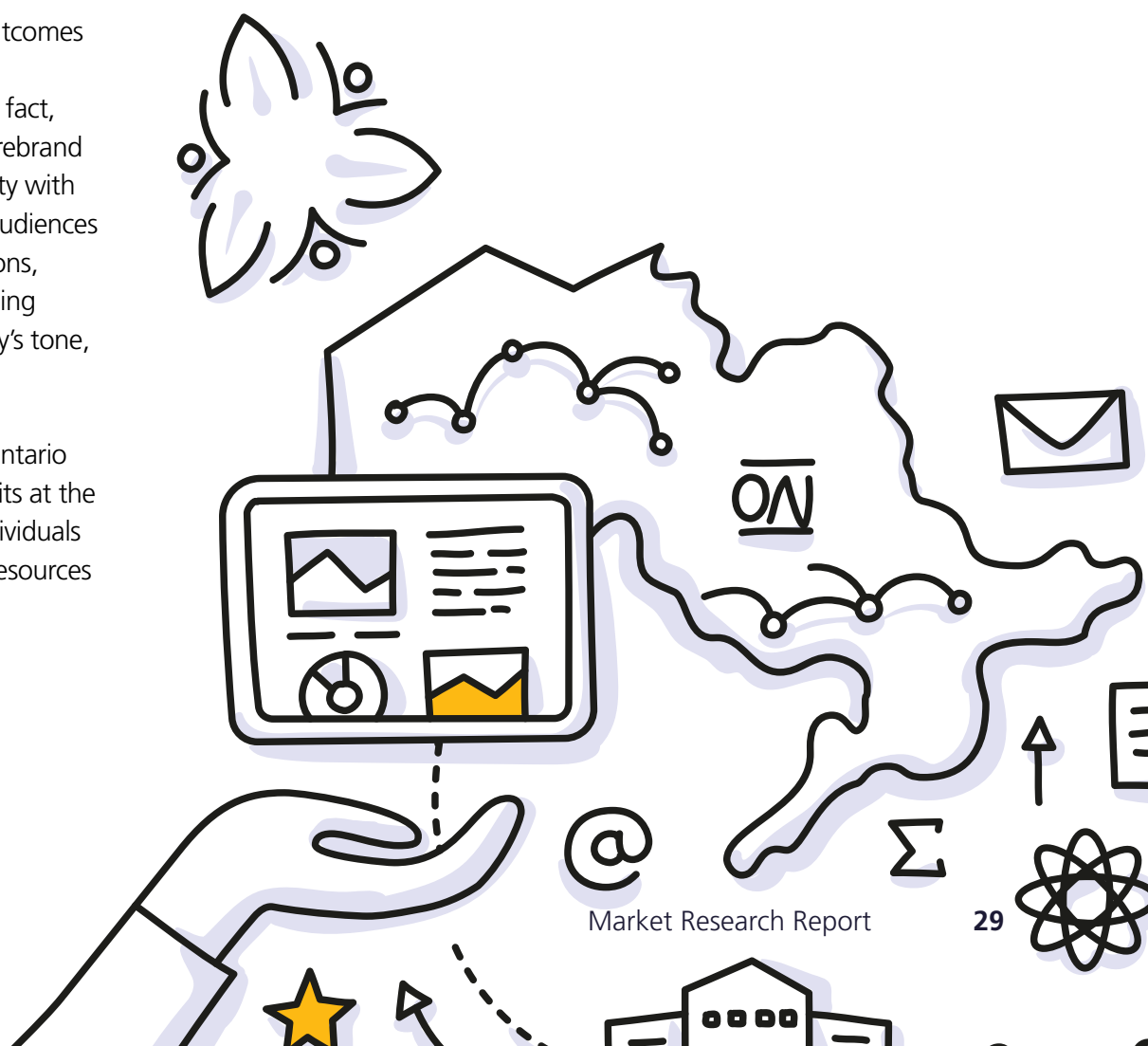
1. Build familiarity with online learning and what it has to offer, focusing on quality, interaction, and the difference it will make in everyday lives
2. Focus communication around the drivers of applications, learners' ability to trust in the quality of online education, and the way in which online learning can enhance graduates' opportunities and careers
3. Focus on grad students and professionals for the time being
4. Address the motivational and contextual barriers to online learning by:
 - Helping people realize that they have what it takes to be successful
 - Reinforcing the importance of lifelong learning through online means
 - Convincing people that online education will make a difference in their lives by advancing their career and creating opportunities
 - Addressing the societal misperception that online learning is inferior in some way
 - Leveraging professionals' attestations as proof that online learning is of value to them
5. Build the eCampusOntario brand and address confusion about what the organization is and what it does



Conclusion

The results from the Ipsos study lead to a variety of positive outcomes for eCampusOntario, including possibilities for new marketing strategies and improved awareness about target audiences. In fact, eCampusOntario utilized the results to craft a company-wide rebrand that addressed issues raised by the study—such as low familiarity with the eCampusOntario brand—and appealed to the company's audiences in a fresh and innovative way. Using Ipsos' key recommendations, eCampusOntario refurbished its website, developed public facing marketing campaigns, and is working to improve the company's tone, voice and messaging across all mediums.

The content upgrades and graphic redesign of the eCampusOntario website work to position the site as a modern, vital tool that sits at the forefront of the online movement. It aims to better inform individuals about the benefits of online learning and Open Educational Resources (OER).



References

Image 1: Familiarity with online learning – Q.5 Thinking about online study programs or courses that are offered by universities or colleges in Ontario, please indicate how familiar you are with the following items: Base: All Respondents (unwtd) n=1050

Image 2: Favourability – Q.2 Based on [your child's/your] current situation, how favourable are you towards the overall education experience at Ontario universities and colleges through Base: All Respondents (unwtd) n=1050

Image 3: Reasons for being favourable – Q.4 You've indicated that you're ... towards online programs or courses. Why do you say that? Base: Total Answering (unwtd) n=808

Image 4: Reasons for being unfavourable – Q.4 You've indicated that you're ... towards online programs or courses. Why do you say that? Base: Total Answering (unwtd) n=242

Image 5: Perceptions of Online Study Programs/Courses – Q.1 Thinking about the program or course [you are currently enrolled in/you are planning to take/you child it planning to take], how important are each of the following to you when deciding what program or course to enroll in? Base: All Respondents (unwtd) n=1050

Image 6: Head-to-head: traditional campus vs. online campus – Q.3 Based on [your child's/your] current situation, do you think that a traditional campus setting or online program or course offered in Ontario provides the better option in the following areas: Base: All Respondents (unwtd) n=1050

Image 7: Advocacy - Q.6 Which of these statements reflects your view, overall, about online study programs or courses offered by universities and colleges in Ontario? Base: All Respondents (unwtd) n=1050

Image 8: What Drives Applications for online learning?

Image 9: Likelihood to Apply - Q.9 How likely ... to apply to an online study program or course offered by an Ontario university or college in the next two years? Base: All Respondents (unwtd) n=1050

Image 10: Reasons for pursuing an online study - Q.12 Why [is your child/are you] pursuing an online study program or course offered by an Ontario university or college at this time in ... life? Analyzed Respondents : Likely To Apply To Online Program/Course n=709

Image 11: Helpful info for online learning programs - Q.11. You indicated that [your child is/you are] likely to apply to an online study program or course offered by an Ontario university or college. What would be helpful to know about online learning, if [they/you] are considering this as a means to study at the undergraduate or graduate level? Base: Likely to Apply to Online Program/Course (unwtd) n=709

Image 12: Aided familiarity with eCampusOntario - Q.15 How familiar are you with eCampusOntario? Base: All Respondents (unwtd) n=1050

Image 13: Value of Services - Q.18 Thinking about the eCampusOntario website, how valuable would you find each of the following? Analyzed Respondents : Familiar With eCampusOntario n=480

Image 14: Value of Services - Q.18 Thinking about the eCampusOntario website, how valuable would you find each of the following? Analyzed Respondents : Familiar With eCampusOntario n=480

Image 15: Behavioural Science Analysis: Motivation - Q.14 To what extent do you agree or disagree with the following statements? Base: All Respondents (unwtd) n=1050

Image 16: Behavioural Science Analysis: Physical Context - Q.14 To what extent do you agree or disagree with the following statements? Base: All Respondents (unwtd) n=1050

Image 17: Behavioural Science Analysis: Physical Context - Q.14 To what extent do you agree or disagree with the following statements? Base: All Respondents (unwtd) n=1050

Image 18: Behavioural Science Analysis: Social Context - Q.14 To what extent do you agree or disagree with the following statements? Base: All Respondents (unwtd) n=1050

Image 19: Barriers and Challenges to online study programs



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