From: Roger Pizarro Milian

To: Canadian Education Watchers

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Re: **Surging Demand for Hybrid Learning in Canadian PSE**

COVID-19 forced Canadian post-secondary education (PSE) to make a near-overnight shift to online education. In doing so, it overrode deep-rooted concerns among faculty members, PSE administrators and policymakers alike about the method's efficacy in promoting learning, its appeal to traditional students, and the feasibility of offering it at scale.

As the dust begins to settle, many questions remain about the long-term demand for online learning in Canada. It will have lasting impact and is here to stay, say some, while others have emphasized the many factors that will repel students from online classes and send them back onto campus.

However, in Canada – as in other jurisdictions – data on the evolving demand for the various types of PSE learning have been slow to emerge. As a result, there is little to guide strategic government investments in digital learning infrastructure, or to help institutions anticipate and adapt to demand trends.

Within this context, Academica's University/College Applicant Study (UCAS) provides a useful overview of evolving student demand. Since 2015, the UCAS has asked more than 320,000 applicants to a non-random sub-sample of more than 70 Canadian institutions about their preferred form of course delivery. Patterns in these data – though lacking the generalizability we are accustomed to from other national surveys – provide much food for thought.

At a national level, there has been little change in student demand for online/distance learning since 2015. In 2022, 10 percent of UCAS respondents indicated they preferred online learning. This is only up 4 percentage points from 2018 to 2020, when roughly 6 percent expressed the same preference.

A 15-percent drop in demand for in-class learning was the biggest shift in the UCAS survey, from 71 percent to 56 percent of applicants, which almost perfectly matches the increase in those choosing hybrid and online options.

It is worth emphasizing that COVID-19 only accelerated existing long-term trends.

We don't know when PSE student demand will stabilize, but it is difficult to imagine interest in hybrid forms of learning – along with the flexibility they offer students – disappearing anytime soon. The genie appears to be out of the bottle.

This makes it more important to keep tracking the evolution of student demand to better serve those opting for online or hybrid forms of course delivery. For example, our 2022 UCAS data – like recent work from the Higher Education Quality Council of Ontario – finds older applicants have greater interest in both online and hybrid classes. While only 2 percent of UCAS respondents aged 17 or younger prefer online delivery, the number is 22 percent for those 30 and over. Similarly, while 22 percent of the younger cohort prefer hybrid, it's 37 percent for older applicants. These figures provide greater clarity about who we are reaching through these various types of program delivery.

Beyond age, we also see notable disparities in applicant preferences across other dimensions (and their intersections) that are worthy of investigation, including respondents' current employment status, gender identity, and parental status. For example, among respondents who identified as women, were employed full-time, and who also had dependents under the age of 15, preferences were almost evenly split: In-class (32 percent), online (29 percent) and hybrid (38 percent). Intelligence on these and other disparities could be key to informing policy strategies to leverage digital learning to meet the needs of underserved populations.

Meanwhile, we need to continue to invest in strategies to improve the quality of digital learning in Canadian PSE to meet the online and hybrid demand. The UCAS does not capture information on students after the application stage, but pre-pandemic studies in the US typically found that online learning has a detrimental effect on varied measures of student learning, particularly for students from marginalized groups. That being said, there is little similar work on hybrid forms of PSE course delivery, which differ from traditional online courses and need rigorous evaluation within the Canadian context, ideally using system-level administrative data.

Beyond the classroom, the longer-term impact of online/hybrid learning requires study, especially since some pre-pandemic US studies found online delivery hurting both student persistence in PSE and labour market outcomes.

However, none of this is possible in Canada until we start doing a better job of tracking student participation in various course delivery methods, and linking that information to outcomes. Perhaps most importantly, these data need to be made accessible to analysts capable of distilling insights that can guide digital learning policy discourse and strategy in a timely fashion.

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