



TRADE MARKET INTELLIGENCE
SPECIAL REPORT:
K-12 Education and Education Technology
in Canada

March 2019

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Nova Scotia Business Inc.



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Report Overview

Primary and Secondary (K-12) education in Canada is a foundational aspect of our country, but not a static one. Canadian education has been adapting to changes in demographics and technology, creating a variety of opportunities for innovative companies.

When considering education-related export in Canada, it is important to understand the unique demographic trends and school systems operating in each province. From the public francophone schools in New Brunswick to the independent schools in British Columbia, different school systems will have different demands, challenges, and needs.

The following report provides information on the different types of K-12 schools available in each province, provincial enrollment trends, and national trends in education technology usage.

This report aims to provide a basic understanding of potential markets and therefore stays broad in scope. However, a variety of associations and organizations have been linked throughout the report which may serve as a starting point for further research into more specific areas of interest.

Additionally, a list of relevant conferences and events related to education technology has been provided. Companies interested in pursuing the market should consider attending events to network and find clients.



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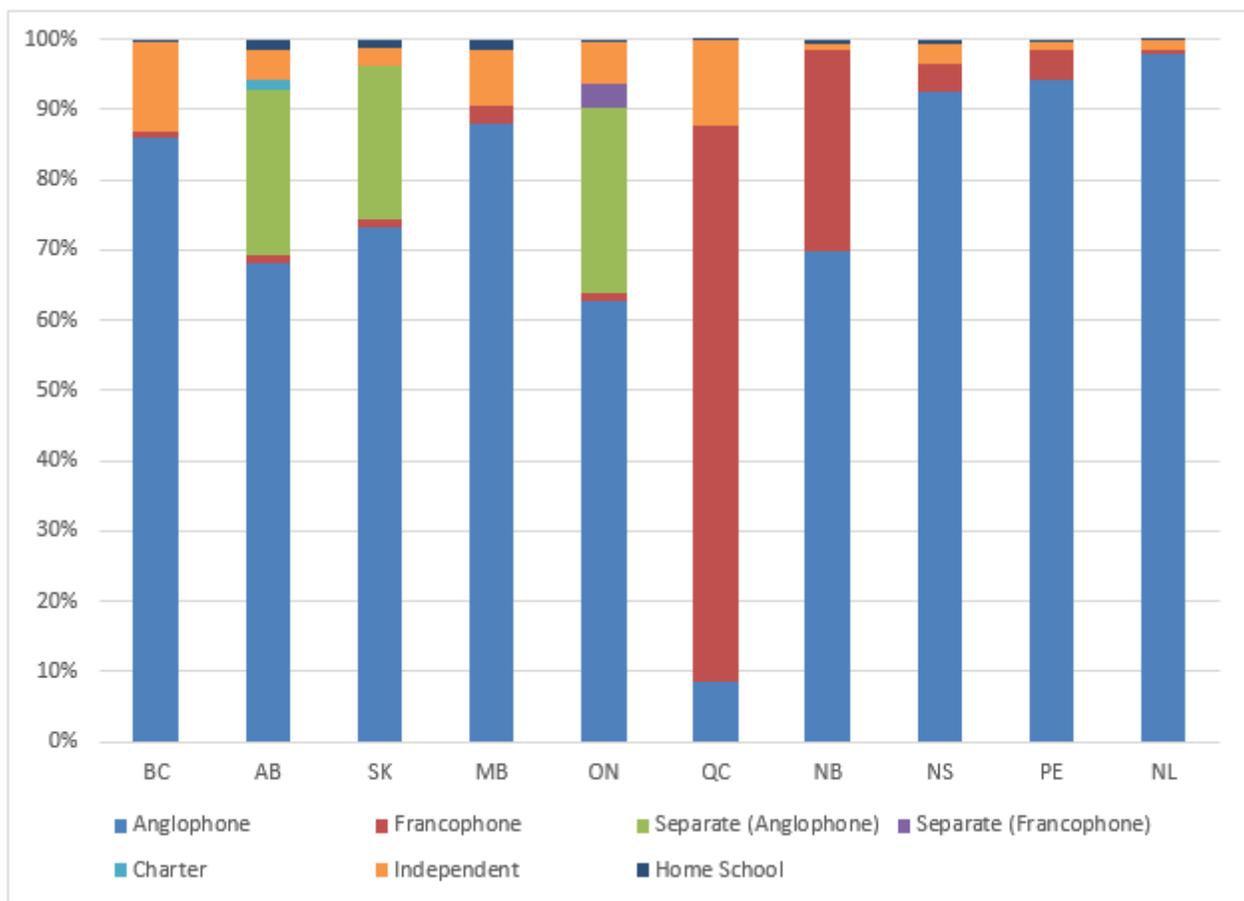
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K-12 Education

In 2017, there were over 5.5 million Canadian primary and secondary school students and over 700,000 teachers, professors and counsellors.^{1 2} There are three main types of K-12 education in Canada: public schools (including anglophone, francophone, separate, and charter schools), independent schools, and homeschooling. The relative share of enrollment in each type of school varies by province, as seen below. It is important to note that enrollment also includes adults in programs primarily for youth; however, those that are registered in Adult Education Centres and youth enrolled in programs primarily for adults are not included. For Quebec, all adults are excluded as adult education is managed separately from the general education program.^{3 4}

Share of Total K-12 School Enrollment by Type of School, 2014/15⁵



Anglophone Public Schools -

English-taught public schools. These schools are largely secular, though Alberta has faith-based (primarily Christian) schools as part of its anglophone public system. With the exception of Quebec, anglophone school systems run by multiple school boards are the primary source of education in all provinces.⁶

Francophone Public Schools -

French-taught public schools. Quebec is the only province that has a public francophone system as its main school system. New Brunswick, as Canada's only bilingual province, also has a notably large share of francophone public school enrollment.⁷

Separate Public Schools -

Roman Catholic or Protestant public schools. Alberta, Saskatchewan, and Ontario operate separate Roman Catholic school boards. Saskatchewan and Ontario also operate one separate Protestant school board each. Roman Catholic instruction is offered in both official languages. In Alberta and Saskatchewan, the francophone school districts operate both secular and Roman Catholic schools teaching in French, and thus their total enrollment is captured as part of the francophone section. However, Ontario has distinct francophone separate school boards, and as such francophone separate enrollment can be viewed independently.⁸

Charter Public Schools -

Autonomous, not-for-profit schools within the public system that provide alternative education programs. They generally have greater discretion in selecting curriculum, offer diverse teaching approaches, and focus on more specific learning styles than public schools. As of 2014/15, Alberta was the only province offering charter schools.⁹

Independent Schools -

Schools characterized by alternative teaching approaches (such as the Waldorf or Montessori teaching methods), usually with a distinct academic or religious focus. As of 2014/15, British Columbia, Alberta, Saskatchewan, Manitoba, and Quebec offered partial funding for independent schools, while Ontario and the Atlantic Provinces did not.¹⁰ The term "independent school" is often used interchangeably with the term "private school". However, the Canadian Accredited Independent Schools (CAIS) association defines independent schools as those that are not-for-profit schools while private schools are generally for-profit. Statistics Canada considers private/independent schools to be those operated, managed, and administered by private individuals and/or groups.¹¹ For the purposes of this report, the term "independent schools" will include both not-for-profit and for-profit schools operated by private individuals and/or groups.

Home Schooling -

Parents in all provinces are legally entitled to educate their children at home, though the amount of oversight in the education provided varies by province. Some provinces only require notification to the local school board, while others require periodic progress reports and education plans.¹²

K-12 School Enrollment Trends by Type of School^{13 14}

BC	2000/01 Number	2014/15 Number	2016/17 Number	2000-14 % Change	2004-16 % Change
Anglophone	616,392	538,981	-	-12.6	-
Francophone	2,769	5,382	-	94.4	-
Total Public	619,161	544,363	549,921	-12.1	1.0
Independent	59,734	80,636	83,472	35.0	3.5
Home School	4,134	2,221	2,316	-46.3	4.3
Total Enrollment	683,029	627,220	635,709	-8.2	1.4
AB					
Anglophone	421,765	454,110	-	7.7	-
Francophone	3,141	7,353	-	134.1	-
Separate (Anglo)	125,845	156,768	-	24.6	-
Charter	2,558	9,131	-	257.0	-
Total Public	553,309	627,362	652,272	13.4	4.0
Independent	18,491	29,400	27,534	59.0	-6.3
Home School	5,278	9,631	12,732	82.5	32.2
Total Enrollment	577,078	666,393	692,538	15.5	3.9
SK					
Anglophone	145,062	128,766	-	-11.2	-
Francophone	1,007	1,645	-	63.4	-
Separate (Anglo)	37,225	38,744	-	4.1	-
Total Public	183,294	169,155	179,190	-7.7	5.9
Independent	2,245	4,261	4,572	89.8	7.3
Home School	1,595	2,162	2,376	35.5	9.9
Total Enrollment	187,134	175,578	186,141	-6.2	6.0
MB					
Anglophone	184,066	171,020	-	-7.1	-
Francophone	4,470	5,257	-	17.6	-
Total Public	188,536	176,277	183,018	-6.5	3.8
Independent	13,855	15,344	13,815	10.7	-10.0
Home School	1,047	2,964	3,390	183.1	14.4
Total Enrollment	203,438	194,585	200,226	-4.4	2.9
QC					
Anglophone	105,575	84,523	-	-19.9	-
Francophone	903,246	787,930	-	-12.8	-
Total Public	1,008,821	872,453	907,611	-13.5	4.0
Independent	105,245	122,224	122,994	16.1	0.6
Home School	-	1,275	2,565	-	101.2
Total Enrollment	1,114,066	995,952	1,033,170	-10.6	3.7

ON	2000/01 Number	2014/15 Number	2016/17 Number	2000-14 % Change	2004-16 % Change
Anglophone	1,446,255	1,339,282	-	-7.4	-
Francophone	20,000	28,862	-	44.3	-
Separate (Anglo)	603,902	562,017	-	-6.9	-
Separate (Franco)	73,442	73,156	-	-0.4	-
Total Public	2,143,599	2,003,317	2,006,700	-6.5	0.2
Independent	109,904	129,607	138,324	17.9	6.7
Home School	-	6,502	8,757	-	34.7
Total Enrollment	2,253,503	2,139,426	2,153,781	-5.1	0.7

NB	2000/01 Number	2014/15 Number	2016/17 Number	2000-14 % Change	2004-16 % Change
Anglophone	86,555	69,972	-	-19.2	-
Francophone	38,387	28,934	-	-24.6	-
Total Public	124,942	98,906	97,842	-20.8	-1.1
Independent	874	763	1,134	-12.7	48.6
Home School	608	693	762	14.0	10.0
Total Enrollment	126,424	100,362	99,735	-20.6	-0.6

NS	2000/01 Number	2014/15 Number	2016/17 Number	2000-14 % Change	2004-16 % Change
Anglophone	151,445	113,931	-	-24.8	-
Francophone	3,976	4,877	-	22.7	-
Total Public	155,421	118,808	118,566	-23.6	-0.2
Independent	2,608	3,343	3,603	28.2	7.8
Home School	708	981	948	38.6	-3.4
Total Enrollment	158,737	123,132	123,120	-22.4	0.0

PE	2000/01 Number	2014/15 Number	2016/17 Number	2000-14 % Change	2004-16 % Change
Anglophone	23,089	19,113	-	-17.2	-
Francophone	603	825	-	36.8	-
Total Public	23,692	19,938	20,007	-15.8	0.3
Independent	216	226	276	4.6	22.1
Home School	-	91	192	-	111.0
Total Enrollment	23,908	20,255	20,475	-15.3	1.1

NL	2000/01 Number	2014/15 Number	2016/17 Number	2000-14 % Change	2004-16 % Change
Anglophone	90,031	66,937	-	-25.7	-
Francophone	256	358	-	39.8	-
Total Public	90,287	67,295	66,183	-25.5	-1.7
Independent	734	957	1,005	30.4	5.0
Home School	-	126	141	-	11.9
Total Enrollment	91,021	68,378	67,329	-24.9	-1.5

Public School Trends

The vast majority of students in Canada attend public schools. With the exception of Quebec, most public schools are part of the general anglophone system. In Quebec, the majority are francophone.

Overall, the share of students enrolled in public schools declined between the academic year of 2000/01 and 2014/15 in ten provinces. Except for Nova Scotia, there was a slight drop of less than 1.0% in the public-schools enrollment in Atlantic Canada. Provinces outside of Atlantic Canada indicated a significant drop of over 1.0% in public school enrollment. British Columbia had the lowest percentage of students enrolled in public schools at 86.8%, while New Brunswick had the highest percentage at 98.5%. British Columbia had the largest decline; -4.3% over the period. New Brunswick, on the other hand, had the smallest decline in percentage at 0.3% over the period.

Notably, the overall downward trend was seen more strongly in anglophone public schools than francophone public schools. While anglophone schools were declining, francophone schools saw an increase in enrollment in all provinces except for Quebec and New Brunswick.

In Alberta, Saskatchewan, and Ontario, between 20% and 30% of students attend separate schools. Enrollment in separate schools increased in Alberta and Saskatchewan but decreased in Ontario.

Charter schools in Alberta increased enrollment by an impressive 257%, making them the fastest growing public-school category in Alberta.

Between the 2014/15 and 2016/17, the downward trend for total public-school enrollment had shifted in some provinces. British Columbia, Alberta, Saskatchewan, and Manitoba saw increases in total public enrollment. The highest increase was in Saskatchewan, which increased by 5.9%.

Home Schooling Trends

Home schooling accounts for only a small share of total enrollment across Canada. It is most prevalent in Manitoba, Alberta, and Saskatchewan, where it accounted for 1.5%, 1.4%, and 1.2% of total enrollment, respectively, in 2014/15.

Between 2014/15 and 2016/17, all provinces saw an increase in home schooling enrollment, with the exception of Nova Scotia which decreased -3.4%.

Independent School Trends

Canada has about 2,000 private/independent schools.¹⁵

With the exception of New Brunswick, which recorded a decline of -12.7%, all provinces indicated growth in the number of students enrolled in independent schools between the 2000/01 and 2014/15 academic years. British Columbia had the highest increase in the number of students enrolled, while Saskatchewan had the highest percentage change, increasing by 89.8%. The highest share of enrollment for independent schools was in Quebec, where independent schools accounted for 12.3% of total enrollment in 2014/15.

All provinces saw growth in the share of total enrollment for independent schools. Even New Brunswick, which had a negative percentage change in number of enrolled students, recorded a slightly larger share of total enrollment, growing from 0.7% in 2000/01 to 0.8% in 2014/15.

Between 2014/15 and 2016/17, all provinces except for Alberta and Manitoba continued to see growth in the number of students enrolled in independent schools. The most significant growth was in New Brunswick, which grew enrollment by 48.6%, followed by Prince Edward Island which saw a 22.1% increase.



School Boards

With so many school boards active in Canada, associations are key to finding and understanding which school boards have jurisdiction in a target market.

The [Canadian School Boards Association](#) (CSBA) consists of members from provincial school board associations that represent just over 300 school boards, serving close to four million elementary and secondary school students across Canada. CBSA strongly supports the public-school system and the value of local school boards/districts across Canada through advocacy, leadership, and policy implementation. The names and website links to all of their provincial school board association members are available on the [membership section](#) of the CSBA website.

There are also many associations for independent schools, including:

- [Association of Christian Schools International \(East, West\)](#)
- [Canadian Association of Independent Schools \(CAIS\)](#)
- [BC Federation of Independent School Associations](#)
- [Society of Christian Schools in British Columbia \(SCSBC\)](#)
- [Manitoba Federation of Independent Schools Inc. \(MFIS\)](#)
- [The Prairie Centre for Christian Education](#)
- [Conference of Independent Schools of Ontario](#)
- [Ontario Federation of Independent Schools](#)
- [Fédération des Établissements D'enseignement Privés](#)
- [Quebec Association of Independent Schools](#)

Opportunity: Canadian Accredited Independent Schools (CAIS)

[CAIS](#) is a national organization for independent schools in Canada. Accredited independent schools are not-for-profit, are overseen by an elected Board of Governors, and are in compliance with provincial standards.¹⁶ Hence, independent schools have the freedom to explore new ways of teaching and learning, and seek educational excellence that best fits their students. The organization aims to pursue accreditation, exemplary leadership training, research, and international standards of educational excellence.¹⁷ For independent education, CAIS is the symbol of educational excellence, with 12 Standards examined by the Standards Council of the Board and recognized by the [National Association of Independent School \(NAIS\)](#).¹⁸

There are currently 94 accredited independent schools, which can be found through the “[Find a School](#)” function of the CAIS websites. All of these schools are committed to a CAIS standards evaluation every 7 years, which includes a reflective and collaborative school improvement process, National Standards, and research and professional development.¹⁹

With their focus on providing more for their students, CAIS schools may represent a potential opportunity for companies with innovative offerings.

Digital Trends

Educators and students have access to a greater range of information, content, and technologies than ever before. Information technology in education, or “EdTech”, is being gradually integrated into the Canadian K-12 educational system and environment.

According to the [Association for Educational Communications and Technology \(AECT\)](#), EdTech is defined as “the study and ethical practice of facilitating learning and improving performance by creating, using, and managing appropriate technological processes and resources.”²⁰ Due to this significant shift in education, new teaching and learning methodologies are being used to accommodate changing Canadian educational content. Each Canadian province has its distinct digital initiatives to improve their education system and support educational technology.

In the report *Digital Trends and Initiatives in Education: The Changing Landscape for Canadian Content* prepared for the Ontario Media Development Corporation in 2017, the concept of 21st century learning has become the primary focus of ministry, school district, and school-based initiatives.²¹

[Canadians for 21st Century Learning and Innovation \(C21 Canada\)](#) is a national, not-for-profit organization that advocates for 21st Century models of learning in education. According to C21 Canada, “digital learning environments are prerequisites to 21st century models of learning.”²² The idea of 21st century learning aims to prepare all learners by providing the means for skills development, competencies, and knowledge required to succeed in a dynamic, technology-driven, and globalized world.²³ This is facilitated by initiatives in better instruction quality, personalized learning, flexible learning environments, and technology-driven tools and resources to support students in discovering their learning pathways.

Several frameworks have been developed to address 21st century learning. They emphasize the following skills, attributes, and competencies:²⁴

- Literacy and numeracy;
- Critical thinking, inquiry, and problem-solving;
- Innovation, creativity, and entrepreneurship;
- Communication and collaboration;
- Metacognition (learning to learn, self-directed learning);
- Local, global, and digital citizenship.

The concept of 21st century learning has a significant impact in K-12 education, shifting the way in which education is thought about and classrooms are organized.

Evolving Practices in the 21st Century Classroom²⁵

From...

A focus on covering all curriculum content; "One size fits all" instruction



An emphasis on the learning process and enabling students to "learn how to learn". Accommodating students' diverse needs through personalized learning and efficient use of technology.

From...

A teacher as the source of information and knowledge; Lecture-style instruction



A teacher who facilitates, guides, and activates learning. Designing lessons in which students are engaged through inquiry and project-based learning to deepen their learning.

From...

A teacher as the sole director of learning



Teachers guide students to shape their learning pathways. Promoting personal growth, success, and lifelong learning.

From...

Little or no technology integration; Learning in a physical space



Flexible learning models and environments are enabled by technology and extend outside the classroom (blended and online learning, Learning Commons, field trips, etc.).

From...

Teachers who use limited approaches and technology to access professional learning



Teachers are a diverse group of life-long learners. Engaging in continuous self-directed and collaborative or community-based learning through digital content and technology-enabled approaches.

Technology integration is one major area of change in teaching practices and student learning optimization. Some of the most commonly used technologies are listed below.²⁶

Interactive Whiteboards

Interactive Whiteboards (IWB) are large interactive displays in the form of a whiteboard. SMART Board® (based out of Calgary) and ActivBoard are two of the most popular IWB systems. This allows content interaction between teachers and students.

As part of mobile learning, Apple iPad and Google Chromebook are two of the most popular devices deployed in K-12 education. Other kinds of tablets are also used in schools.

Tablets and Chromebooks

eReaders

eReaders allow students to access eBooks and other digital content. With features like text-to-speech, adaptable font size, built-in dictionaries, reference tools, etc., they are often used to facilitate book clubs, novel study, independent reading, research, and reading programs.

Assistive/Adaptive Technologies allow students with disabilities to access knowledge and information by adapting content into supportive mediums. For example: Personal Reading Machines, Speech or Voice Recognition, Screen Readers, Video Description, Large Print/Screen Magnification, Closed Captioning/Transcription.

Assistive/ Adaptive Technologies



In 2014, the public education charity [People for Education](#) found that 99% of Ontario elementary and secondary school students have access to computers in school and that for most students computer use starts in kindergarten.²⁷ Technology use is also no longer restricted to computer labs and libraries: 96% of schools reported student access in classrooms and 58% reported students using their own devices. In fact, only 85% of schools reported technology access in libraries, and 76% in computer labs, suggesting a decrease in the relevance of stationary EdTech spaces. Many schools now have “mobile labs” with devices that can be moved between classrooms.²⁸

Mobile learning is also enabled by Bring Your Own Device (BYOD) programs, which allow students to use their own personal electronic devices (tablets, laptops, eReaders, smartphones, etc.) at school. BYOD programs are proliferating in Canadian schools.²⁹

One issue that must be addressed, particularly as BYOD programs are introduced, is equitable access to technology for all students.³⁰ The availability and use of educational technology across Canada does vary. In K-12 education, the use of specific technology tools varies greatly from district-to-district and school-to-school. While 83% of Canadian households had access to the internet at home in 2014, there was still a huge difference in access for the top and bottom income quartiles. In-home internet was available to 98% of families in the top quartile, but only 58% of families in the bottom quartile. Many schools reported having at least some students that did not have internet access at home. As a result, some schools have initiatives to provide affordable technologies for families to purchase for home/school use, or they try to provide as much in-school access as possible.³¹

Today, educational tools in schools are typically provided by the province or school districts and are expected to meet the following criteria: ³²

- Protect student safety, data, and privacy
- Enhance instruction and learning
- Work on all devices and browsers and be reliable
- Assist with student and teacher productivity and efficiency
- Be data driven
- Be intuitive and user-friendly

For educators, there are several barriers to the full implementation of digital resources; this includes: ³³

- Availability and reliability of technology tools;
- Infrastructure (i.e., access to technology or broadband);
- The price point of licensed digital resources;
- Budget/funding is dedicated to the purchase of digital content specifically and intentionally developed for use in the Canadian classroom; and
- Teachers' lack of confidence and knowledge relating to the use of technology for instruction.

Learning Management Systems (LMS) are a widely used type of technology in Canada. LMS refers to systems or platforms that provide a centralized place to create, deliver and manage a course or a learning module, as well as a suite of administrative tools that allow teachers to manage student learning and assessment. These systems can be open source, or licensed by provincial education ministries, districts, or schools. In Canada, the most widely used LMS systems are Moodle, Blackboard Learn, and Brightspace by D2L.³⁴

LMS systems help to facilitate the use of technology in classrooms, particularly as it pertains to flexible/collaborative learning and sharing content. Most content being disseminated through LMS systems must be integrated into the system by the purchaser. While digital educational content is being sold into schools today, resources are typically sourced through the usual channels and are not sold on the strength of being pre-loaded or integrated into LMS systems.³⁵ However, this may be an area of opportunity in the future.



TIP: If your company is looking to research specific opportunities, you may want to consider applying for NSBI's Small Business Development Program. The Small Business Development Program supports the acquisition of a private sector consultant to provide professional expertise. [Find out more online](#) or by [contacting your nearest Regional Business Development Advisor](#).



Online Learning

Completely digital learning is also a growing trend in Canada. Online learning, also known as virtual, distributed, or distance education, is an increasingly important strategy used by schools to offer students greater access to courses.³⁶ Provincial online learning initiatives include:

- [LearnNowBC](#)
- [Alberta Distance Learning Centre](#)
- [eLearning Ontario](#)
- [New Brunswick Distance Learning Program](#)
- [Newfoundland and Labrador Centre for Distance Learning & Innovation](#)

Canada has a long history of developing software and technologies for online learning, going back into the 1980s when the University of Guelph developed CoSy, an early computer conferencing system. Other notable Canadian contributions to online learning technology include the major LMS system provider Desire2Learn, which is based out of Kitchener, and Elluminate, a Calgary-based web conferencing company that was purchased by Blackboard Inc to be integrated into their suite of services.³⁷

Companies interested in the online learning space should be aware of the [Canadian eLearning Enterprise Alliance \(CeLEA\)](#). CeLEA is Canada's only national commercial e-learning sector-focused industry organization. CeLEA plays a key role in fostering communication between industry, government, and other stakeholders in the e-learning space, with the ultimate goal of identifying and communicating business opportunities, and helping Canadian companies successfully compete for those opportunities.

Conferences and Events

The following section provides a short list of K-12 education conferences in Canada and a list of key global “EdTech” conferences. Other events can be found through the [EdCan Network](#) and [Canadian Teacher Magazine](#) event calendars. Conferences located outside of Canada can be found using [EdTech.Events](#) and the [EdSurge](#) events calendar.

Reading for the Love of It 2019

Feb 21-22, 2019 - Annual

Toronto, ON

<http://www.readingfortheloveofit.com/index.html>

43rd annual language arts conference which addresses all grade levels including ELL, ESL, special needs, French immersion, struggling readers, etc.

National Reading Recovery and Early Literacy Conference

April 4-5, 2019 - Annual

Winnipeg, MB

<http://rrcanada.org/annual-teachers-conference/>

Canada’s premier professional development experience for K-3 teachers of early literacy. Reading Recovery is an evidence-based professional development model designed for children who struggle with early literacy learning. A post-conference workshop focuses on early literacy.

2019 Digital Learning Symposium

April 7-9, 2019 - Biennial

Vancouver, BC

<https://canelearn.net/symposium19/>

An annual Digital Learning Symposium hosted by the PC Partners in Online Learning, BlendEd BC, Educators for Distributed Learning, and the Canadian eLearning Network.

CONNECT

April 30-May 3, 2019 - Annual

Niagara Falls, ON

<http://www.canconnected.com/>

Canada’s largest EdTech conference with over 2,000 participants to share best practices and drive the horizons of EdTech in the global and digital economy.

6th Annual CAfLN Conference and Members' Symposium

May 2-4, 2019 - Annual

Ladner, BC

<http://caflnforum.ca/2019-conference-and-symposium/>

Hosted by Delta School District, the Canadian Assessment for Learning Network (CAfLN) offers a pre-conference, conference, and symposium events regarding the assessment for learning in Canada.

Canadian Network for Innovation in Education (CNIE)

May 21-24, 2019 - Annual

Vancouver, BC

<https://cnie2019.arts.ubc.ca/>

CNIE connects educators, administrators, and practitioners in a bilingual, pan Canadian network. CNIE addresses all educational contexts, including K-12, post-secondary, and the private sector.

EduTeach2019

July 27-28, 2019 - Annual

Toronto, ON

<https://educationconference.info/>

4th Canadian international conference on advances in education, teaching, and technology, offering premier knowledge building and professional networking event for global educators.

Online Learning 2019

October 8-10, 2019 - Annual

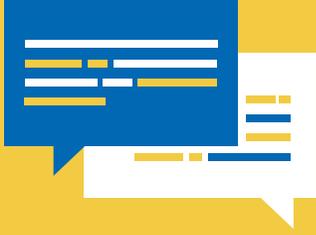
Toronto, ON

<http://globalonlinelearningsummit.ca/>

A global summit & EdTech expo focused on teaching and learning in the digital age.



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