Learning Management Systems in Ontario – Who's Using What?

2012

Arroway and Sharma stated that in 2008, over 99 per cent of surveyed colleges and universities in the USA reported operating a Learning Management System (LMS) as their core platform for blended and online learning. According to the 2010 Campus Computing Survey, 97 per cent of campuses have a single, standard (campus-wide) LMS system installed.

However, 60 per cent of schools support only one proprietary LMS. The 2009 ECAR Study of Undergraduate Students and Information Technology showed that the number of students using an LMS increased from 80 percent in 2006 to 91 percent in 2009. The percentage of courses that use an LMS rose from 15 percent in 2000 to more than 53 percent in 2008.

Not all in the LMS "garden" is rosy however. The 2011 ECAR Study of Undergraduate Students and Information Technology shows that only one in four students think that these LMS systems are being used effectively within their institutions, and only one in five think that the LMS systems are well integrated in classroom activities for blended learning.

There is clearly more work to do.

Who "Owns" the Market for LMS Systems?

In 2005, Blackboard acquired WebCT. Combined, the two systems controlled 76 per cent of the US post-secondary education market. Between 2005 and 2010, Blackboard's market share declined rapidly, despite acquiring Angel, another open source platform, in 2009. During the same period, all of Blackboard's major competitors increased market share:

Figure 1: Market share for select LMS companies in the U.S., 2006-2010
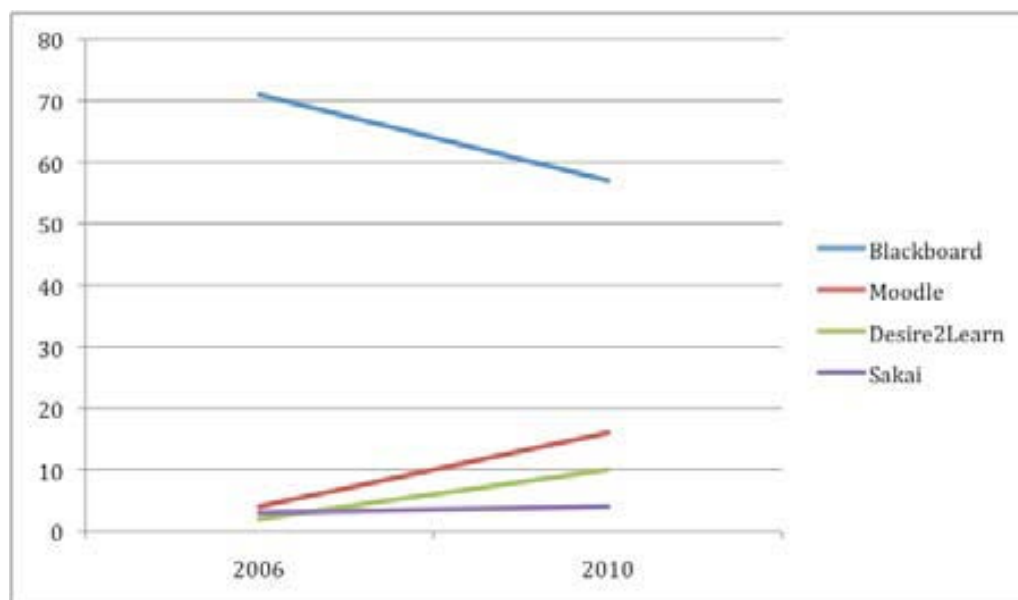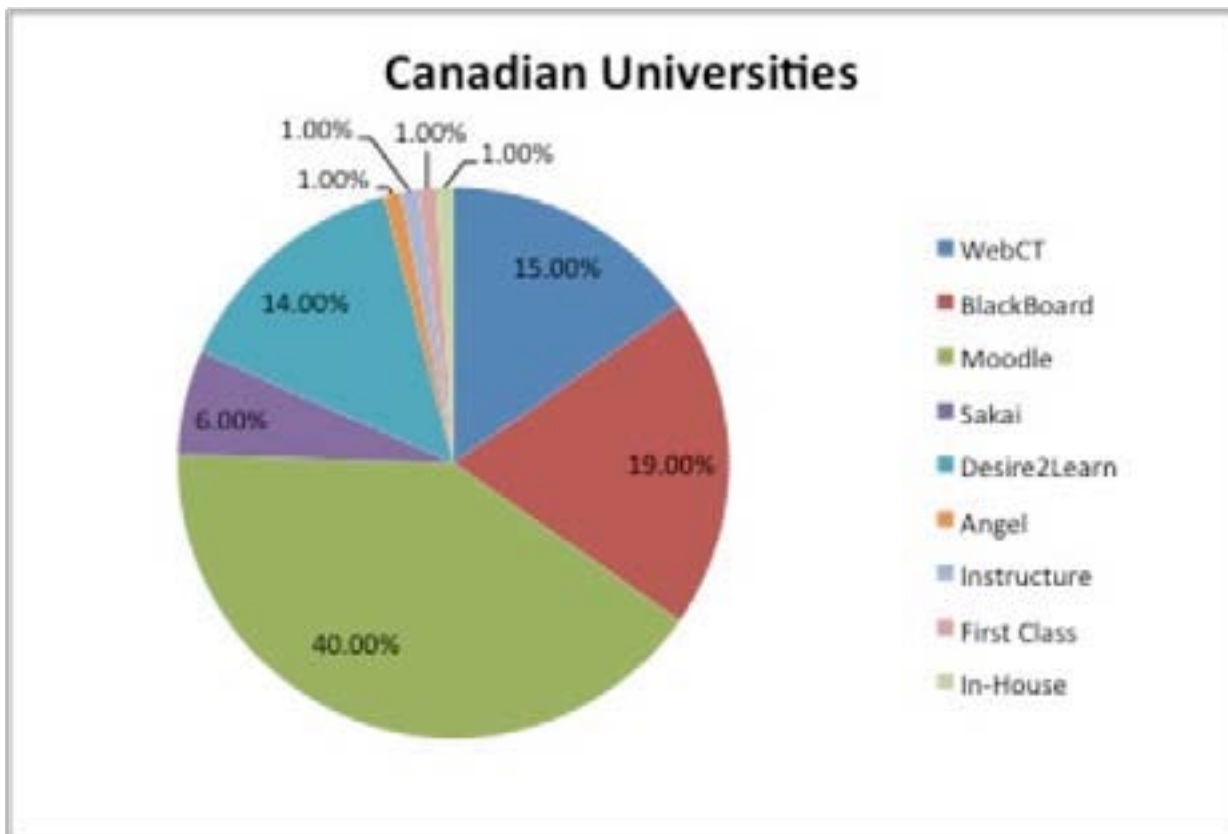

Source: Campus Computing Survey, 2010

The decline in Blackboard's market share may be less substantial than the data suggests. The percentages reflect changes in the number of institutional clients acquired by each provider. If the use of each system is analyzed in terms of number of users (students), then the changes in market share are less severe. Blackboard, like many larger companies, has sought to focus on its largest and most profitable clients. Many of the institutions now using Moodle, for example, are quite small in terms of student enrolment.

For this study, a search was done of Canadian institutional web sites to identify which LMSs they are using. The charts below illustrate adoption percentages of learning management systems in universities in Canada (Figure 2) and Ontario (Figure 3).

Figure 2: Market share of select LMS companies in Canadian universities, 2010

Canadian Universities

- WebCT — 15.00%
- BlackBoard — 19.00%
- Moodle — 40.00%
- Sakai — 6.00%
- Desire2Learn — 14.00%
- Angel — 1.00%
- Instructure — 1.00%
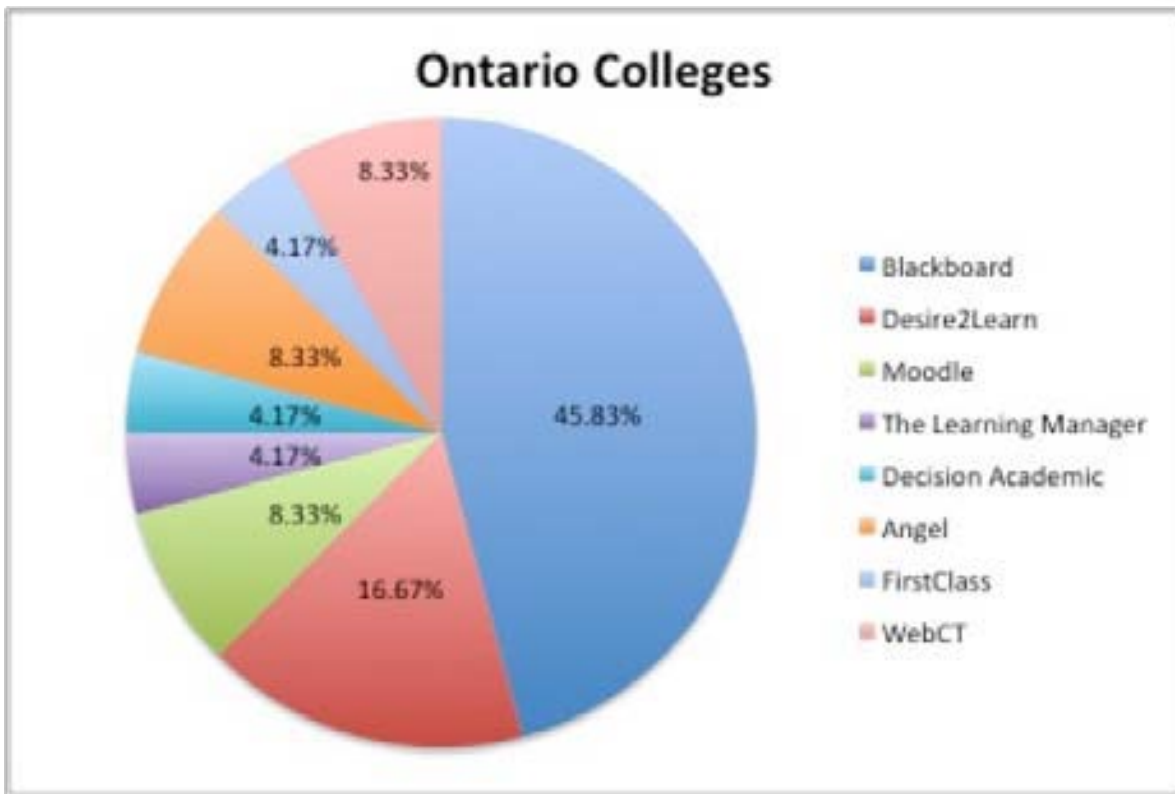- First Class — 1.00%
- In-House — 1.00%

There are only a couple of small public post-secondary education institutions in Canada that do not have an LMS deployed as of January 2012. Moodle is deployed at a surprising 40 percent of Canadian universities, well above the adoption rate in the US. All five of the institutions that have more than one LMS deployed include Moodle.

It can be seen that the picture for Canadian universities is quite different from the Campus Computing Survey (which covers only U.S. institutions). Moodle is clearly the main LMS used in Canadian universities, with 40 per cent, while Blackboard (with Angel and Web CT) has 36 per cent of the market, and Desire2Learn (a Canadian company based in Ontario) has 14 per cent. Also worth noting is that Moodle is particularly popular among institutions in British Columbia.

Figure 3: Market share of select LMS companies in Ontario universities, 2010
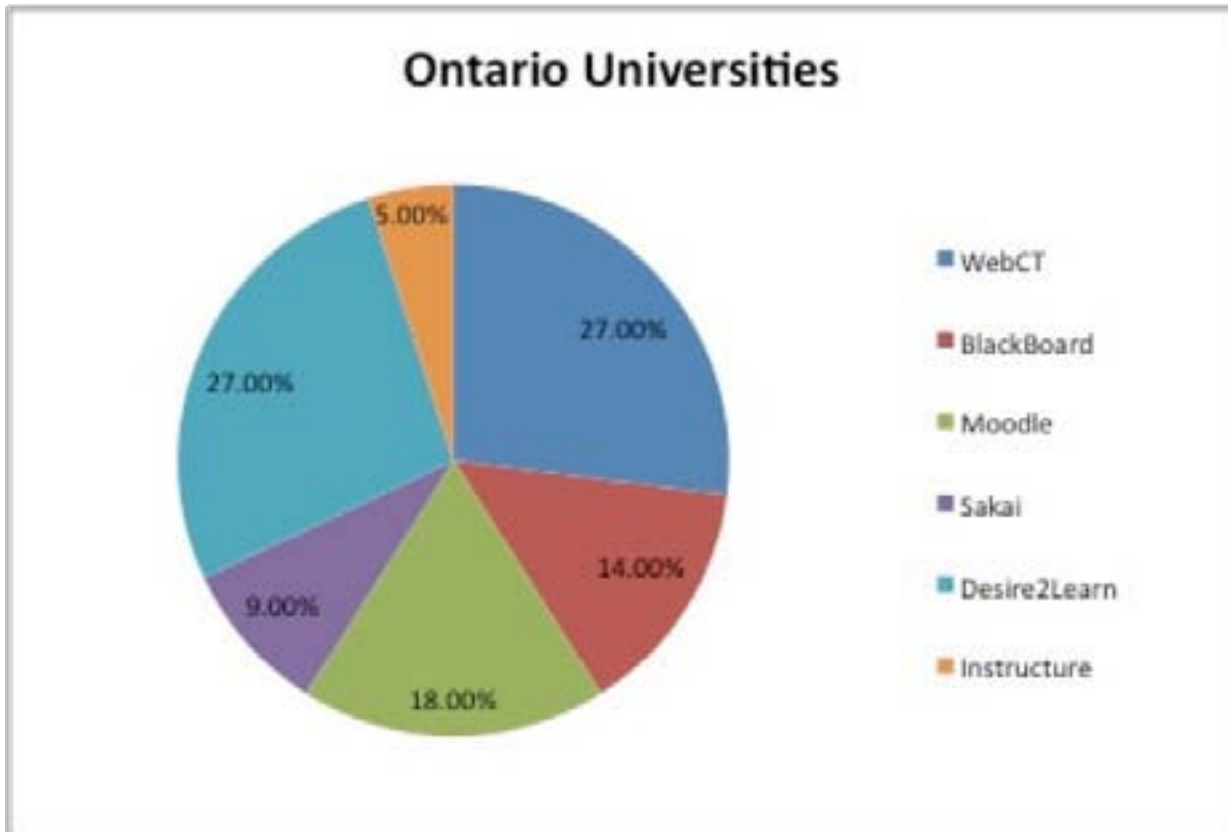
It is worth noting that the split between proprietary (Blackboard, WebCT, Angel and Desire2Learn) and open source systems is higher (68-32) in Ontario than in Canada as a whole, including Ontario (53-47). The market share in the US between proprietary and open source systems is more consistent within Ontario than it is for the rest of Canada.

Ontario Colleges

- Blackboard — 45.83%
- Desire2Learn — 16.67%
- Moodle — 8.33%
- The Learning Manager — 4.17%
- Decision Academic — 4.17%
- Angel — 8.33%
- FirstClass — 4.17%
- WebCT — 8.33%

The above chart depicts the LMS choices amongst Ontario's twenty-four community colleges. The shares of the different platforms are largely consistent with North American statistics, with a very high proportion of proprietary systems (over 90 per cent). We can speculate on the reasons for this, but generally colleges are likely to see less risk in going with well established proprietary products, which also fit well with a more standard form of didactic teaching. It will be interesting to see if the colleges also follow the trend in Canadian universities to move more towards open source solutions over the next few years.