



A Study of National Market Potential for CHEC Institutions

By Al Hiebert, Executive Director, CHEC

In the fall of 2006, Christian Higher Education Canada (CHEC) together with The Evangelical Fellowship of Canada (EFC), commissioned Ipsos Reid to conduct a study of the national market potential for CHEC institutions. The completed report, delivered in July 2007, is entitled *Christian Post-Secondary Education in Canada: Defining the Market*. The full 353-page report (plus a 43-page executive summary) provides CHEC and its 34 member institutions with much useful data with which to plan future ministry and marketing initiatives. These institutions, all of which are affiliates of the EFC, consist of Christian universities, university colleges, graduate schools, seminaries, and Bible colleges across Canada.

The study consisted of three phases: 1) consultations in three cities with key EFC and CHEC stakeholders; 2) seven focus groups with selected target audiences in three Canadian cities; and 3) a national survey including 1,000 representative telephone interviews, plus 6,698 online surveys of six target audiences outside Quebec. The online survey population was broken into the groups listed in table 1 for analysis.

Table 1. CHEC Survey Population Groups

Population Group	Number
Members of the general population	2,582
Parents of high school students	1,955
18-24 years of age, not in school	533
High school students who have not had any contact with CHEC member	925
High school students who have contacted CHEC member institutions	243
Current students at CHEC member institutions	460
Total	6,689

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From their replies, Ipsos Reid grouped respondents into six “mind-sets” on matters of faith and education that are listed in table 2 below.

Table 2. “Mind-sets” of Survey Respondents

“Mind-sets”	Percent of Population ^a
Evangelical Enthusiasts – committed to Christian belief, church and religion in society	12%
Cultural Christians – committed to Christian belief but not to church	10%
Private Believers – uncomfortable with public faith	14%
Church & State – believe faith and education should be kept separate	19%
Deeply Disinterested – virtually no interest in religion	19%
Ambivalent Agnostics – ambivalent about faith	27%

^a Percentages do not add exactly to 100 due to rounding error.

At the CHEC annual general meeting in Calgary on October 19, 2007, leaders focused especially on several key findings. One major concern was that of those respondents not connected to CHEC institutions, some two-thirds did not know what the expression “Christian higher education” means and could not name a single such institution. For these respondents, the following definition was provided:

To clarify, Christian post-secondary education consists of a group of post-secondary institutions (e.g., universities, colleges, university colleges, and Bible colleges, graduate schools and seminaries) that incorporate a faith-based perspective into their curriculum. This means they promote not only academic and intellectual excellence, but they also pursue goals of personal, moral, and spiritual development with their students.

With this explanation, some respondents favoured “Christian higher education,” others did not for various reasons, and still others offered no opinion. Across all respondent groups, most Canadians favoured the concept of studying in a community of people who share the same values and beliefs. Naturally, some opposed such education and expressed concern that faith and education should be kept separate, lest “single perspective bias” distort the education offered at such schools. Most assume that Christian higher education is only for those who plan careers in religion. Most assume that at CHEC institutions Christian faith is taught in all courses in the curriculum but prefer that discussion of Christian faith should be restricted to religion courses only.

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Understandably, current students studying at CHEC institutions and high school students who have contacted CHEC institutions were overwhelmingly favourable to Christian higher education. They do not think faith and education should be kept separate. For them the experience and prospect of personal and spiritual development are more important than any limitation of perspective, though many think personal and spiritual development is also possible in non-Christian public higher education. Few current CHEC students and high school students who have contacted CHEC institutions think that Christian higher education is only for those who plan careers in religion. Most prefer that Christian faith be taught in all courses in the curriculum rather than having it restricted to religion courses only.

Remarkably, across all respondent segments, between 50% and 98% reported that they would be willing to give “some consideration” to Christian higher education options when selecting post-secondary studies. Even among respondents who had no prior relationship with CHEC institutions, some 10% reported that they would “definitely consider” Christian higher education options. Among the “general population,” 19% reported that they would be willing to give “some consideration” to Christian higher education options, and 46% of Canadian parents gave such indications. Understandably, 93% of students currently studying at CHEC institutions and 97% of high school students who have contacted CHEC institutions “are firmly in the CHE market.” To no one’s surprise, “Evangelical Enthusiasts” support Christian higher education options most strongly.

Study participants were asked to rate both Christian and non-Christian institutions on 19 factors, both concerning their views of the importance of these factors in selecting a post-secondary institution and concerning their views of the relative strength of these institutions. In three areas, most respondent segments give Christian post-secondary institutions much more positive ratings than non-Christian institutions:

- Small class size (greater access to teachers — by all audiences except high school students)
- Having teachers act as mentors (all audiences except high school students)
- Integrating faith as part of the learning process

Also, CHEC students, CHEC high school prospects, and certain market segments give Christian institutions more positive scores than non-Christian institutions in the following areas:

- Teacher/instructor excellence and quality of education (CHEC students)
- Interesting program offerings (CHEC students)
- Learning environment encourages personal as well as academic growth (CHEC audiences, as well as Evangelical Enthusiasts, and Private Believers)
- Residence/living affordability (Evangelical Enthusiasts and Private Believers)
- Tuition/fees affordability (Evangelical Enthusiasts and Cultural Christians)

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From respondent groups outside CHEC students and CHEC high school prospects, however, Christian post-secondary institutions obtained lower ratings than did non-Christian institutions on a number of factors that members of these other groups rank highly as affecting their choice of post-secondary institutions to attend. These include the following factors:

- Interesting program offerings
- Institutional accreditation
- Institutional reputation
- Job placement record
- Breadth of majors/minors offerings
- Quality of equipment and facilities
- Proximity to home so the student can save money by living at home
- Proximity to friends and family
- Access to good socio-cultural activities
- Excellence of extra-curricular activities

For those respondents who knew something about Christian institutions, the report also identified differing perceptions concerning these schools. When these respondents compared Bible colleges to Christian universities, they viewed the latter as providing greater degree recognition, as better accredited, as offering higher degrees and longer schooling, as offering more academic teaching, and as offering a wider range of courses than Bible colleges. These respondents viewed Bible colleges as focusing on the Bible for teaching more than Christian universities. They also viewed Bible colleges as focusing on personal spirituality and religion more than Christian universities.

For those respondents who knew something about Christian graduate level institutions, the report also identified differing perceptions concerning these institutions. Seminary was seen to prepare people for full-time pastoral ministry, to focus more on personal spirituality and religion, and to use the Bible for teaching. Christian graduate school was seen to provide higher degree opportunities, a broader range of courses, and “integrat[ing] Christianity without it being the main focus of teaching.”

When asked for key influencers concerning choice of post-secondary schools, the report showed that in all audiences students seek personal contacts (family, friends, and parents, but not employers or colleagues). “Overall, CHEC students and CHEC high school prospects are much more likely to have looked at a wider variety of information sources than all other audiences.” A second tier of important information sources are institutional materials and contacts, particularly viewbooks, calendars, brochures, and websites.

The report also suggests strategic considerations for prioritizing the audiences. Given the high value that “Evangelical Enthusiasts” place on spiritual and personal growth and on enhancement of faith, this segment represents the strongest market potential for CHEC schools.

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The study listed many conclusions and implications of special interest to CHEC and other evangelicals. “There appears to be a solid Christian post-secondary education market in Canada, with between a fifth and a half of the various target audiences saying they’d consider attending a Christian post-secondary institution.” Of the six segments or mindsets, four segments or mind-sets, which comprise 63% of the Canadian population, show varying degrees of interest in Christian post-secondary education. A portion of each segment is already committed to Christian higher education. The study identified definite opportunities for CHEC enrolment growth among the Evangelical Enthusiasts and Cultural Christians.

The study also listed some key challenges facing CHEC and its members. Among these challenges are the need to raise visibility of Christian higher education in Canada, and to target key audiences for growth potential.

The CHEC council regards the CHEC mission as strategic: “to advance Christian higher education, foster institutional cooperation, and raise public awareness of the value of Christian higher education in Canada.” The Ipsos Reid study findings prompted the CHEC council to strike a marketing advisory group to prepare a new national CHEC communications and marketing proposal, which the CHEC membership approved at the 2007 annual general meeting.

The first of the proposal’s three phases calls for the production of a short DVD suitable for showing in youth groups or congregational meetings. This video will not only raise awareness of Christian higher education options available in Canada but also attract viewers to a redesigned CHEC website, where they can do a “smart search” of various study options and other dimensions of school life available at both the undergraduate and graduate level. To guide viewers to the types of schools that interest them most, CHEC schools will also be grouped as to which curricular concentration - the Bible, theology, and ministry or the liberal arts and sciences - is foregrounded.

As part of Phase 1, it is planned in 2008 to distribute these DVDs to evangelical churches and Christian bookstores across Canada. In 2009, the plan is to distribute these DVDs to mainline churches across Canada as part of Phase 2.

A National Forum is planned for June 1–3, 2009, in the Ottawa area, with some 300–500 participants expected. Seven outstanding plenary speakers have agreed to address the theme, “Discerning our Future: Canadian Christian Higher Education in the 21st Century,” and to serve on a panel. Many peer groups among leaders in CHEC institutions will also meet in breakout sessions. This event will likely also serve to raise public awareness of the values of Christian higher education in Canada.

Digital copies of the full Ipsos Reid 353-page report are available for purchase. For details contact Nita Stemmler, CHEC Program Director, at nstemmler@checanada.ca or phone 519-974-1639. 