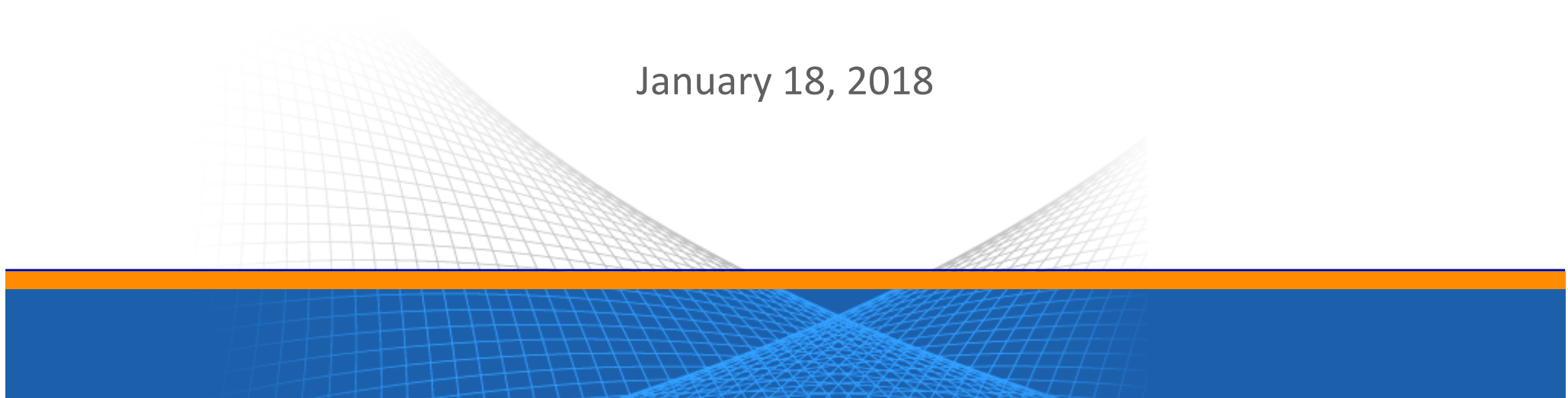




Trends in Higher Education in Canada

University of Victoria

January 18, 2018



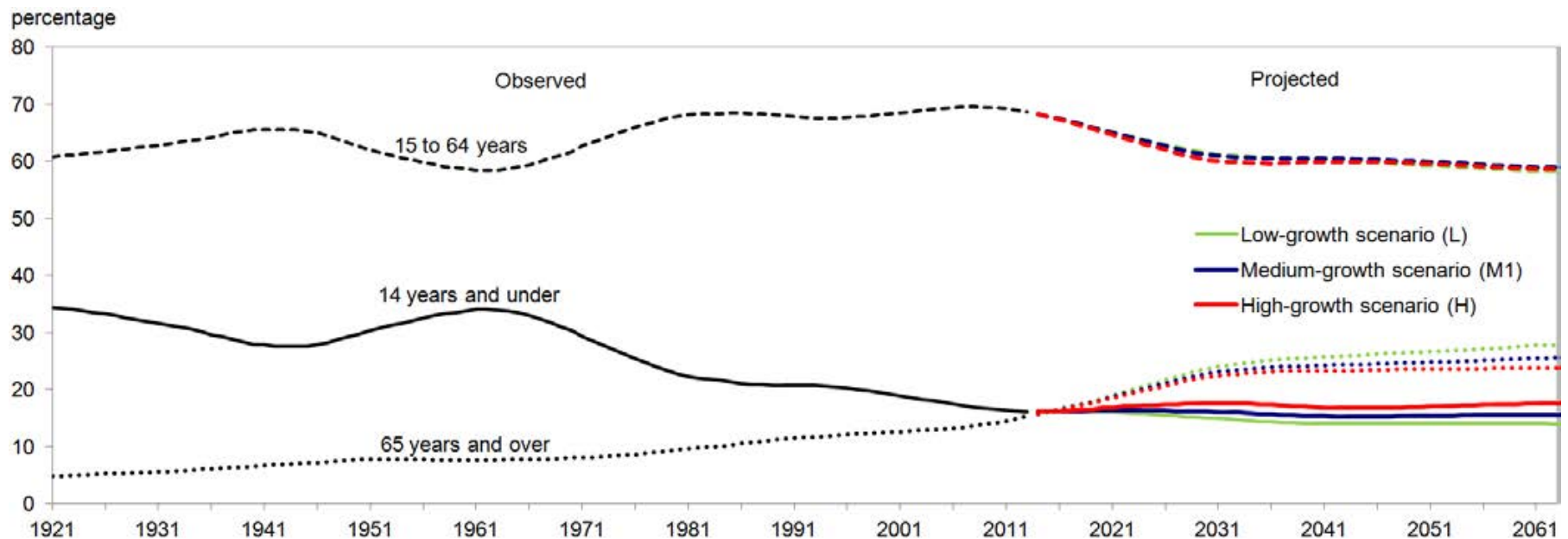
Major trends shaping Canadian HE

1. Demographic shifts
2. The new generation of students and their choice factors
3. Movement toward applied fields and WIL
4. Rise of teaching universities in BC
5. International student trends
6. Indigenization

An aging Canadian population

Figure 2.5

Distribution of the total population by age group, observed (1921 to 2013) and projected (2014 to 2063) according to the low-growth (L), medium-growth (M1) and high-growth (H) scenarios, Canada



Source: Statistics Canada, Demography Division.

Variations by Province

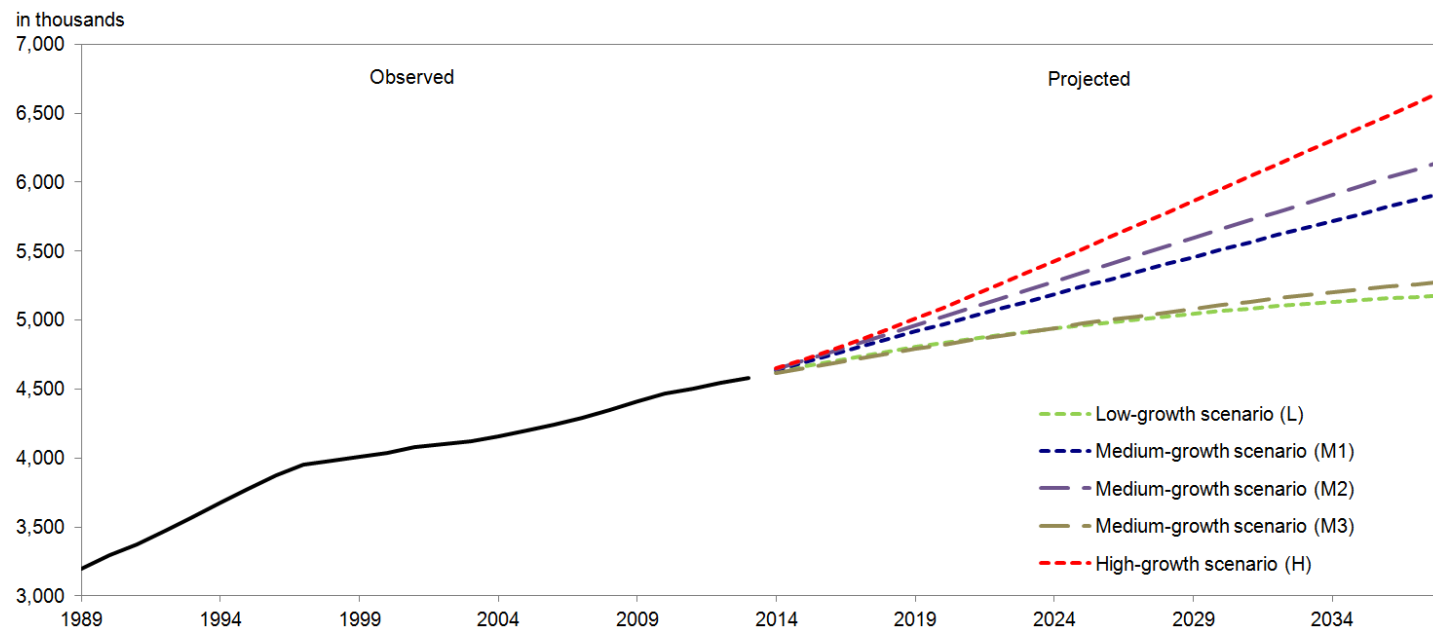
1. The far eastern provinces (PEI, N-L, NS) are flat or shrinking, following stagnant population sizes or decreases:
 - They will also age rapidly, reflecting a smaller young population.
2. Quebec and Ontario continue to grow and dominate Canadian population clusters:
 - However, the population ages there, too, and over a quarter of all people are projected to be over age 65 by 2038.
3. Manitoba, Saskatchewan and Alberta are expected to grow significantly and stand out as the provinces that will be younger than others in the country:
 - This will be an opportunity for recruitment for all universities that attract a national audience.

Variations by Province

1. British Columbia will continue its growth over the next 25 years, according to projections
2. Like the eastern provinces, the population will age rapidly and the percentage of persons over age 65 is expected to reach about 25% by 2038.

Figure 3.19

Population, observed (1989 to 2013) and projected (2014 to 2038) according to selected scenarios, British Columbia



Source: Statistics Canada, Demography Division.

Variations by Province – Aboriginal population

Table 9
Aboriginal identity population and proportion that it represents in the total population by province and territory of residence, Canada, 2011 (observed) and 2036 (according to four projection scenarios)

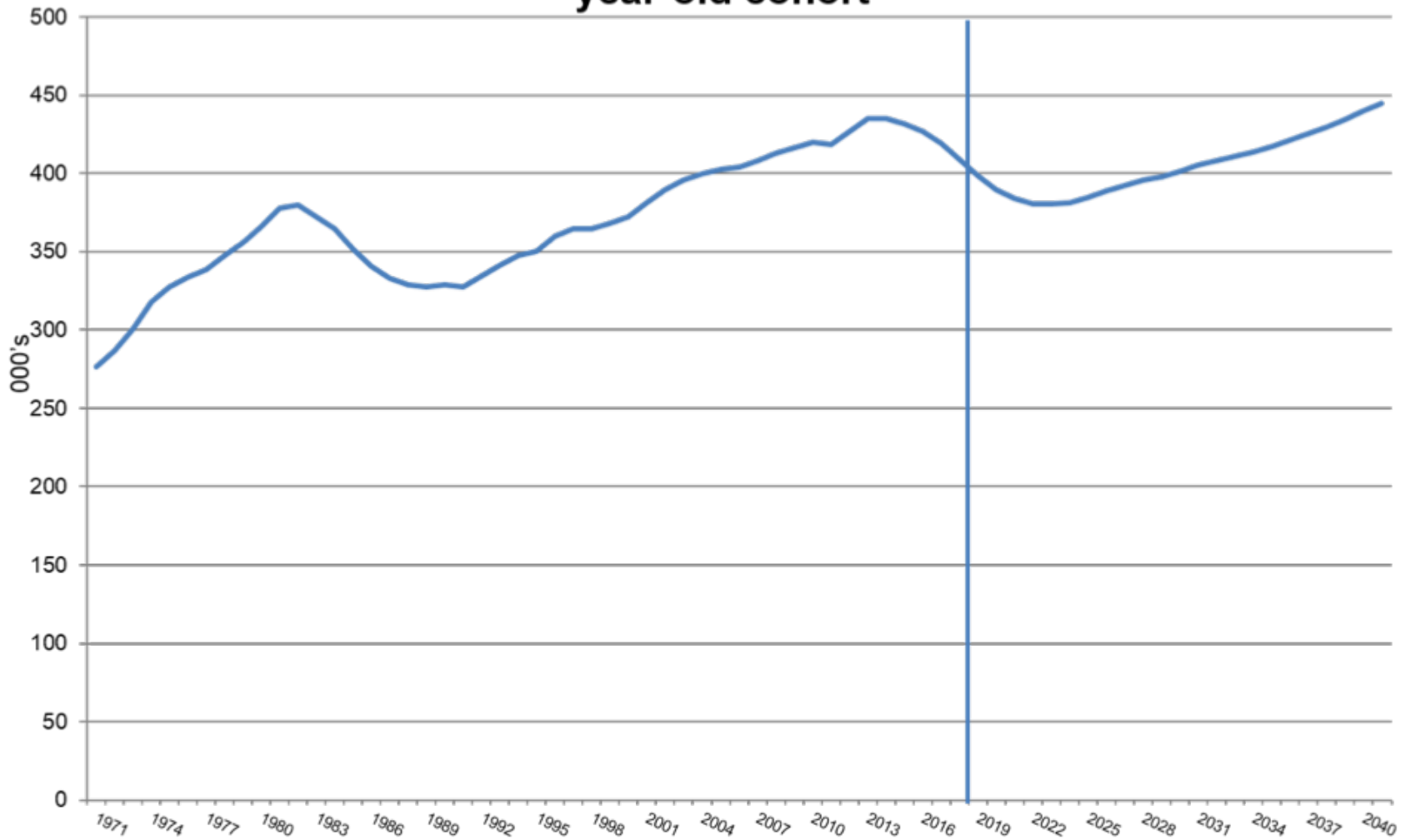
Province and territory of residence	2011 (observed population and proportion)		2036 (projected population and proportion)									
			Reference		Moderate convergence of fertility		Constant fertility		No ethnic mobility		No internal migration	
	thousands	percent	thousands	percent	thousands	percent	thousands	percent	thousands	percent	thousands	percent
Canada	1,502	4.4	2,510	5.8	2,569	6.0	2,633	6.1	1,965	4.6	2,510	5.8
Newfoundland and Labrador	37	7.1	43	9.8	43	9.9	44	9.9	34	7.8	54	10.2
Prince Edward Island	2	1.6	6	4.0	6	4.1	6	4.1	3	1.9	6	3.9
Nova Scotia	35	3.7	57	6.2	58	6.3	58	6.3	39	4.2	64	6.5
New Brunswick	23	3.0	40	5.8	41	5.9	42	6.0	26	3.7	46	6.0
Quebec	162	2.0	275	2.9	280	3.0	286	3.1	195	2.1	276	2.8
Ontario	334	2.5	605	3.5	611	3.6	616	3.6	416	2.4	606	3.6
Manitoba	205	16.7	311	20.1	322	20.7	335	21.3	273	17.6	325	18.8
Saskatchewan	166	15.6	251	20.4	269	21.5	289	22.7	241	19.5	258	18.5
Alberta	236	6.3	430	7.6	438	7.8	447	7.9	346	6.1	393	7.4
British Columbia	241	5.4	416	7.2	422	7.3	428	7.4	316	5.5	403	7.4
Yukon	8	23.3	10	24.0	10	24.3	10	24.6	9	23.5	10	21.7
Northwest Territories	23	51.9	27	54.7	28	55.6	29	56.2	27	54.1	29	51.0
Nunavut	29	86.1	39	88.8	41	89.4	44	89.9	39	88.6	41	88.5

Source: Statistics Canada, Demography Division.

High-growth Provinces

Population trends in British Columbia

British Columbia Population and Projections for 18 to 24 year-old cohort



Some important notes about Canadian demography

1. The northernmost territories continue to have a very small population and even high growth rates leave them with populations smaller than many midsize Canadian cities
2. Much of the projection of growth is fueled by international migration into the provinces:
 - This could change for any number of reasons and growth, as a result, could be negative in several provinces.
3. BC has a highly differentiated post-secondary system, new residents may not understand the variations between institutions. If international in-migration continues, Universities will need to adjust efforts to attract these new students.

The next generation of university students

1. Post-Millennials, Gen Z, iGen, Centennials
 - Born between 1996 and 2000
 - Now entering universities
2. "Cloud innate"
 - Storage is not needed
 - Everything is streaming or online
3. Favorite "channel" is YouTube
4. Hyper-aware of security and safety issues:
 - There has always been terrorism and we have been at war with terrorism since they were toddlers or pre-school age

Important aspects of GenZ and enrolment (Usher, 2017)

1. Parental influence in decision-making is minimal, especially compared to Millennials
 - College choice may be generally guided by parents but is otherwise the student's choice
2. Willing to invest only if the returns appear to be extraordinary
 - Otherwise, “good enough” is OK and local options for HE would be fine
3. Most HE marketing turns them off:
 - Quality is not what they expect and they are negatively impressed by the institution, as a result
 - Recruitment presentations are perceived as saccharine or generic and therefore of little worth

Applied Learning

1. Growth in popularity of STEM fields
2. Shifting away from fields in social sciences, liberal arts and fine/performing arts
3. For men, shifts away from math and biology
4. For women, gains in biology and neutral in math

Recessional impacts on choice of major

Figure 6: Change in Share Due to 1 ppt Increase in Unemployment Rate - Men

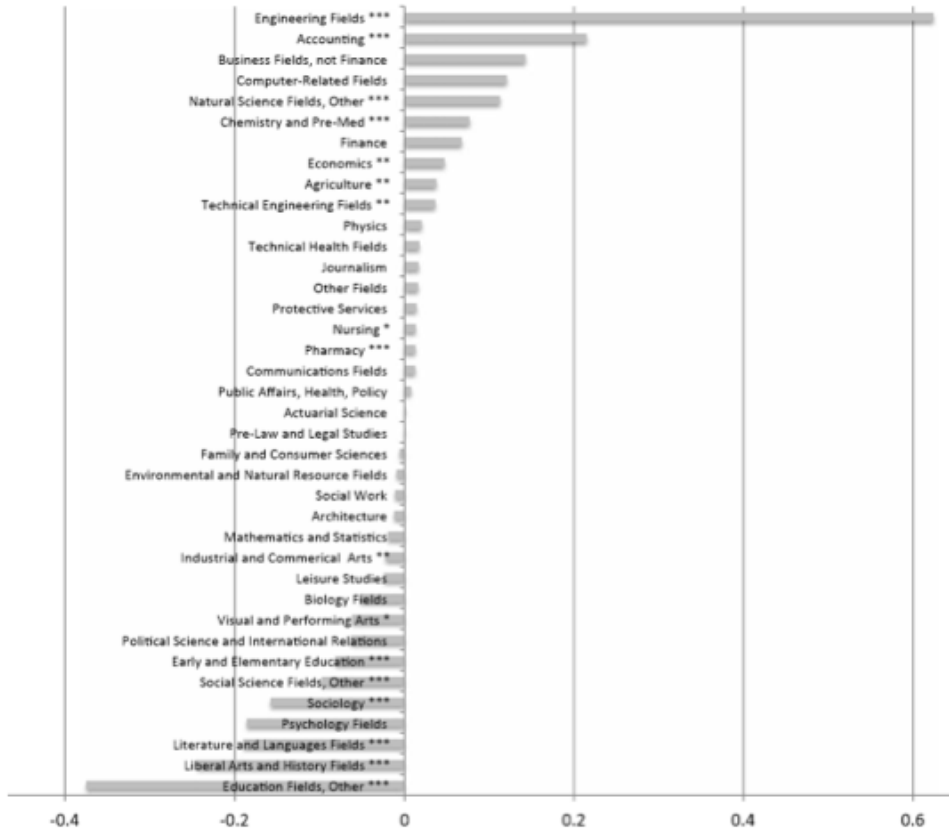
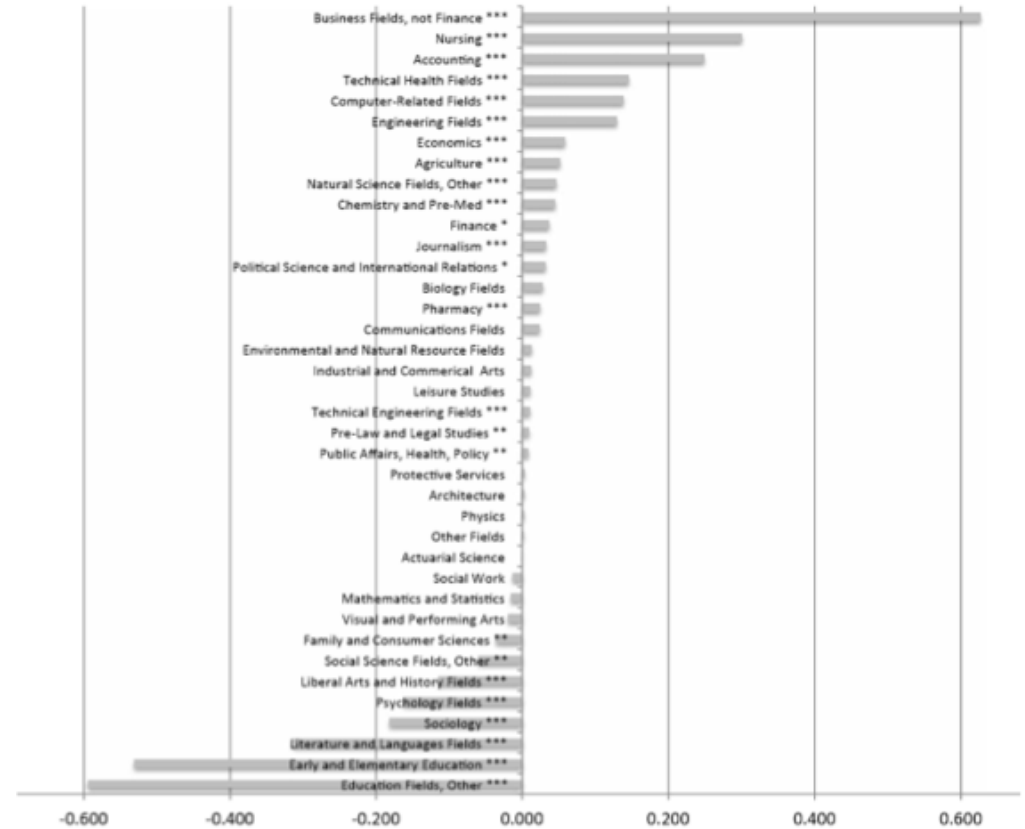


Figure 4: Change in Share Due to 1 ppt Increase in Unemployment Rate - Women



Bloom, E., Cadena, B.C., Keys, B.J. (2015): Investment over the Business Cycle: Insights from College Major Choice. IZA Discussion Paper No. 9167. Bonn.

Work Integrated Learning (WIL)

1. Goal:

- 100% of Canadian post-secondary students will have access to applied learning as part of the degree programs
 - Sado, Jenkins, Cannon – July, 2016 in iPolitics
- Four initial steps:
 - Establish a common definition of WIL
 - Find out what is working and where gaps exist
 - Bring everyone on-board
 - Remember why this is important (making Canadians globally competitive)

2. Also a prevalent movement in Australia

New Universities in BC

1. 1989: UBC-O, Okanagan College partnerships and continued expansion of Okanagan through 2005
2. Five colleges were granted university status in 2008:
 - Fraser Valley
 - Kwantlen
 - Vancouver Island
 - Emily Carr Art + Design
 - Capilano
3. While none of these alone may significantly dent UVic's overall enrolment, they may:
 - Chip away at key revenue-paying students
 - Erode some of the quality within specific programs where they are somewhat competitive

International student trends

1. Up 10.7% across Canada from 2016 to 2017
2. More than a “Trump Bump”:
 - Follows a pattern of growth: 7% annually in 2015 and 2016
 - Driven by policy decisions that make Canada easier to come to and easier to stay, live and work in after degree completion
3. Uneven results across the provinces:
 - BC had the biggest increase at 15.2%
 - Newfoundland decreased by 5.7%
 - Saskatchewan grew just 2%
 - PEI and ON grew by 13%, each

Shen, A. *International student enrolment rises by 11 percent at Canada’s universities*. University Affairs, November 24, 2017. Accessed at universityaffairs.ca on 11/29/17.

Indigenous representation in HE

1. Growth in programs and activity directed at making universities more “welcoming to and representative of Canada’s Indigenous peoples.”
 - Academica, January 2017

2. 2015 recommendations of the Truth and Reconciliation Commission (just some of those most evidently related to HE):
 - Close educational achievement gaps
 - Fund post-secondary grants (PSSSE)
 - Preserve Aboriginal languages, including degree programs in them
 - Close health gaps; improve health care for Aboriginal peoples:
 - Increase the number of Aboriginal health care professionals
 - Data collection and study of Aboriginal social issues; related increases in treatment and improvement of social conditions

Indigenous representation at UVic

1. UVic has an “Indigenous Plan 2017-2022”
2. Five Cedar Strands:
 - Students
 - Faculty and Staff
 - Education
 - Research
 - Governance
3. Student enrollment has grown from just over 500 to over 1200 since 2002.