

NORTHERN
POLICY INSTITUTE

INSTITUT DES POLITIQUES
DU NORD

ENVIRONMENTAL SCAN 2015

CONFEDERATION COLLEGE, JANUARY 23RD 2015



In Brief

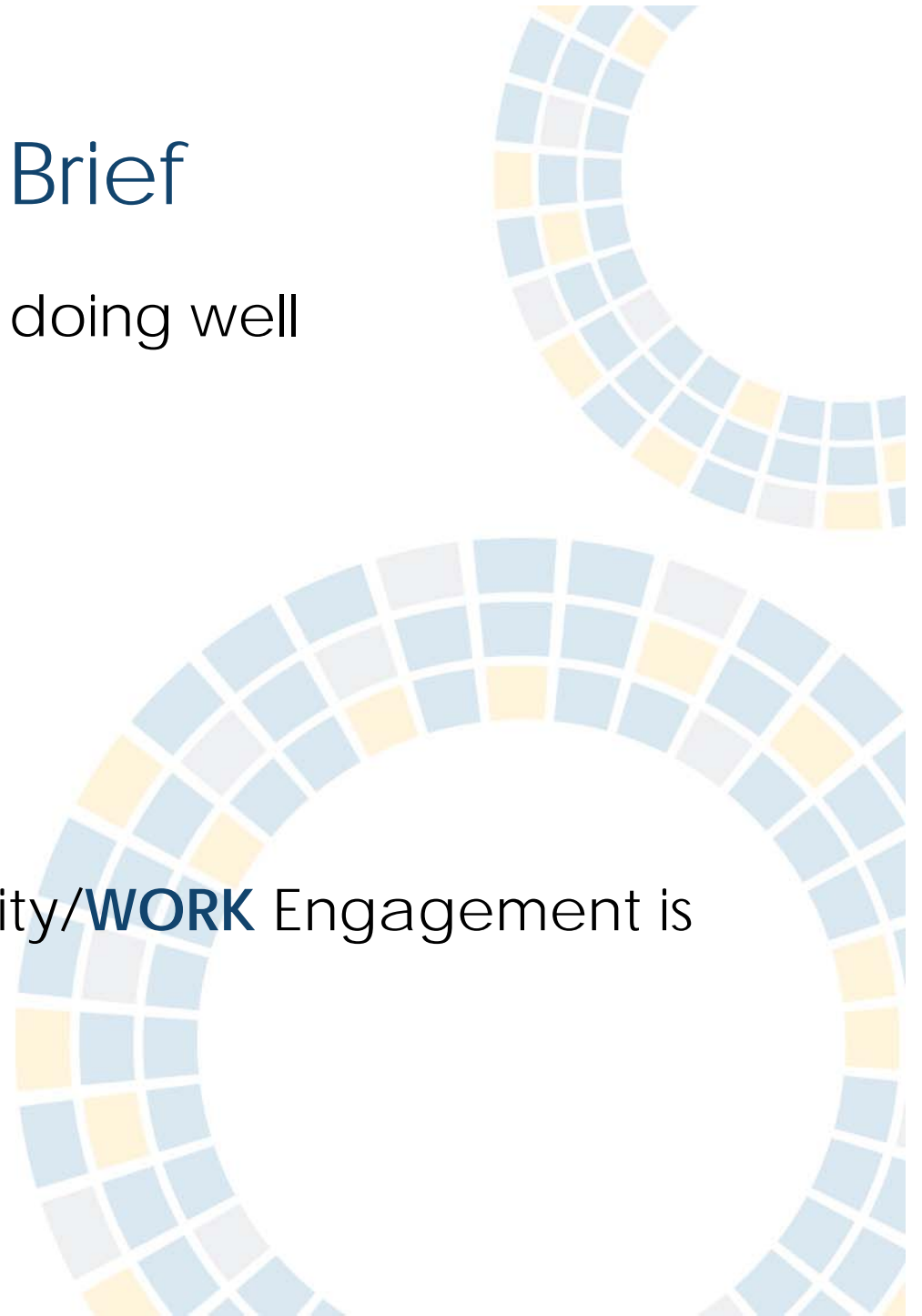
Confederation College is doing well

But the world is changing

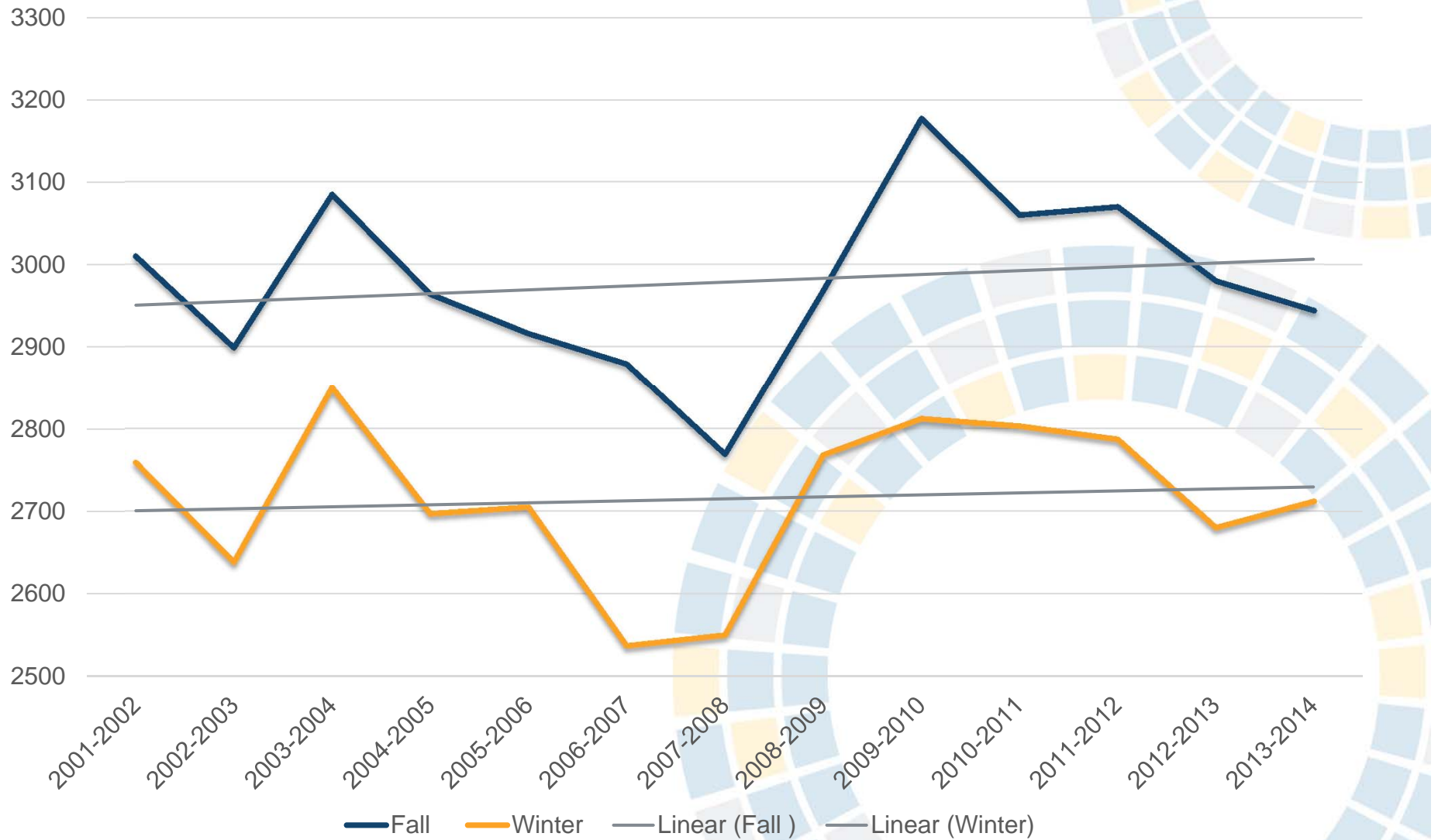
Demand is changing

- *Demand from who*
- *Demand for what*

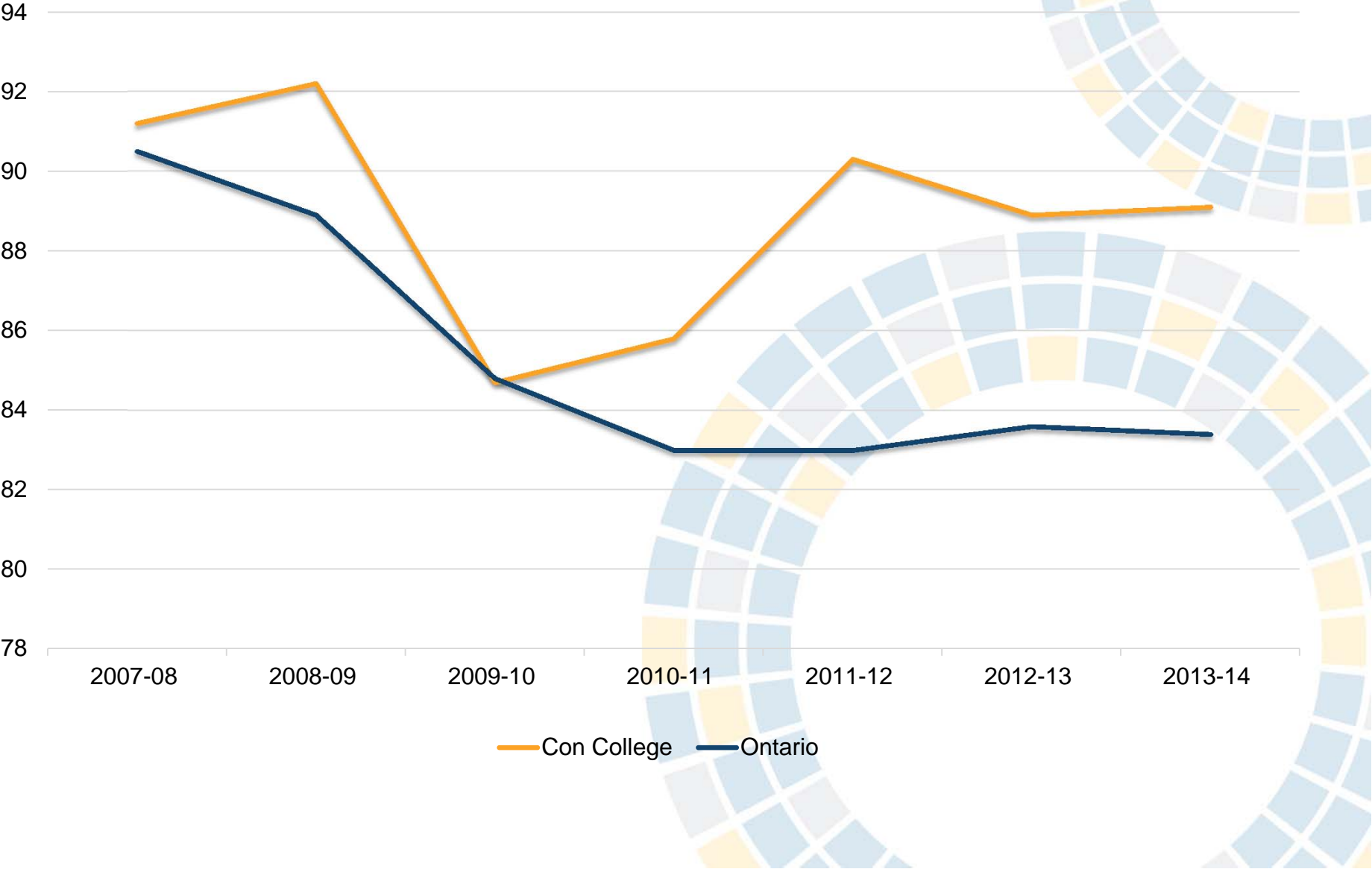
Student/Family/Community/**WORK** Engagement is
the key



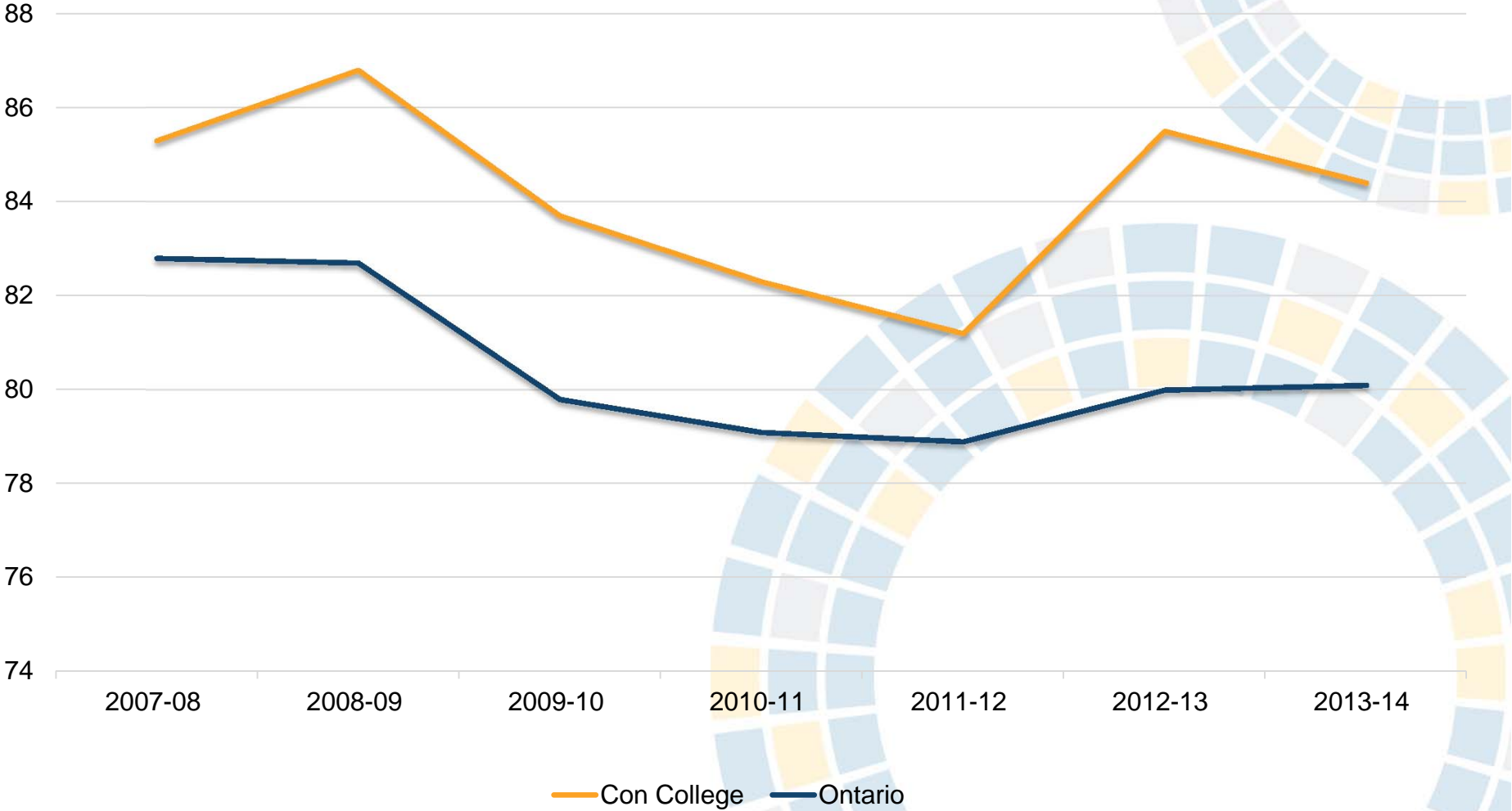
Good - Total Enrolment



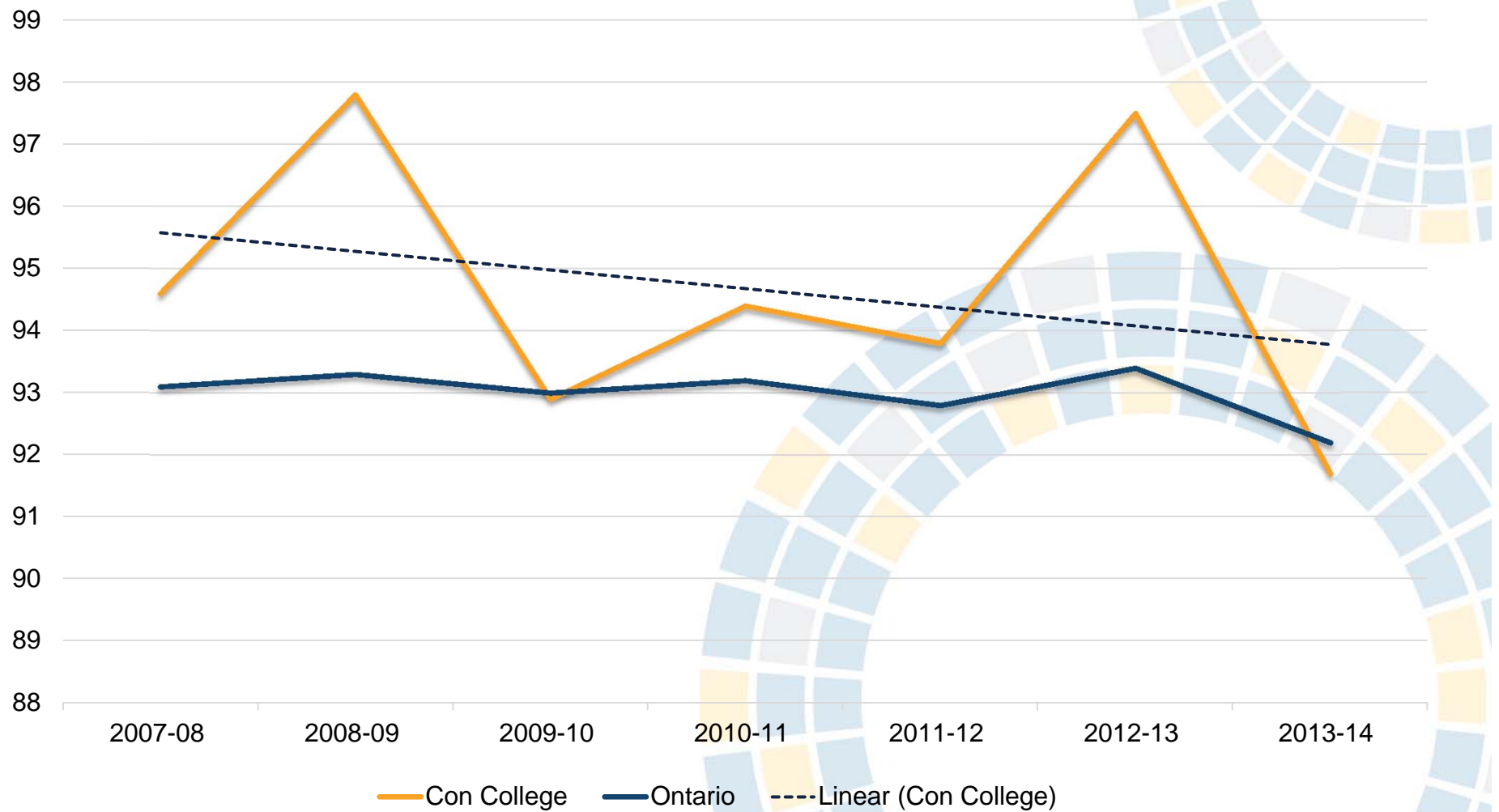
Good - Graduate Employment Rate



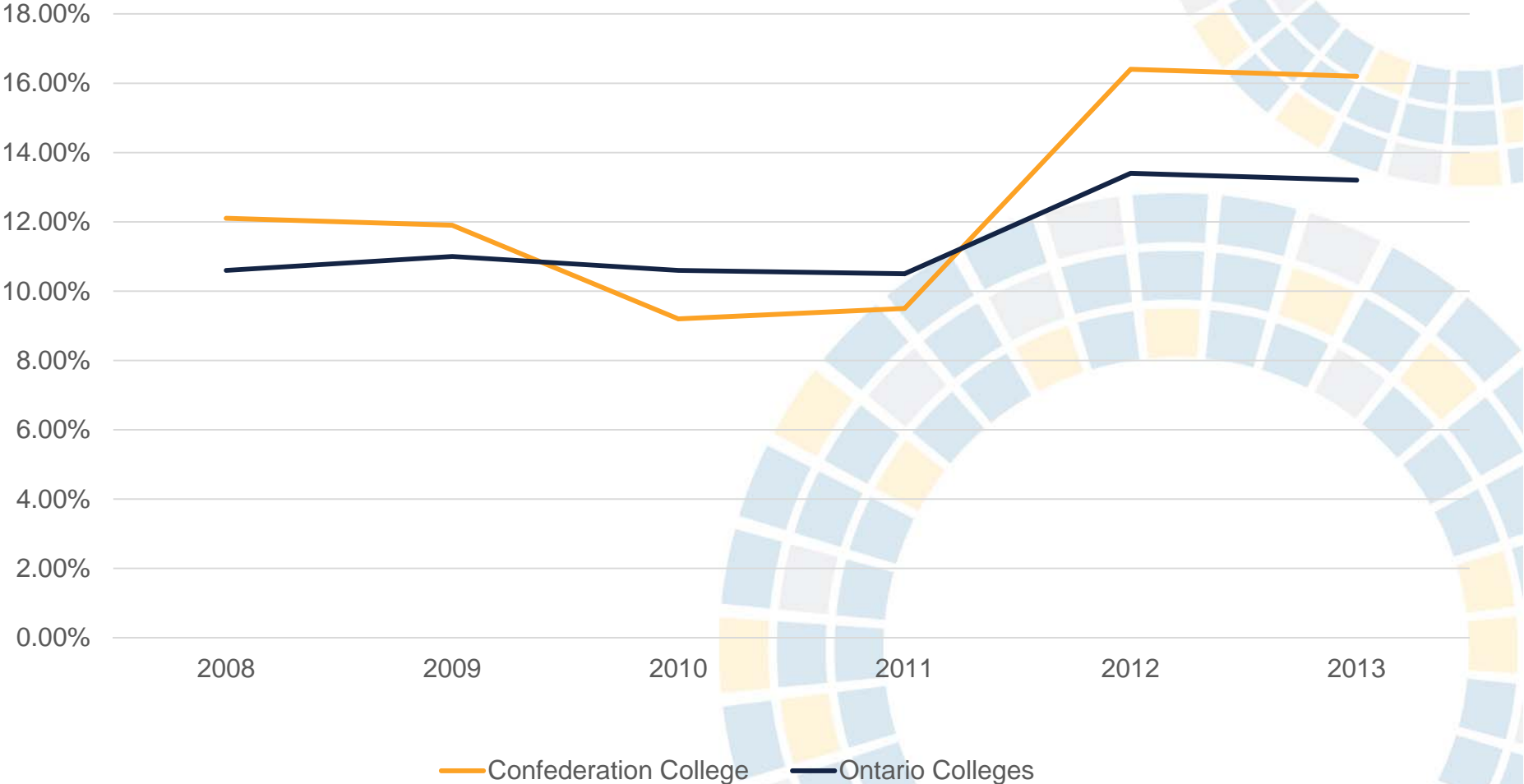
Good - Graduate Satisfaction Rate



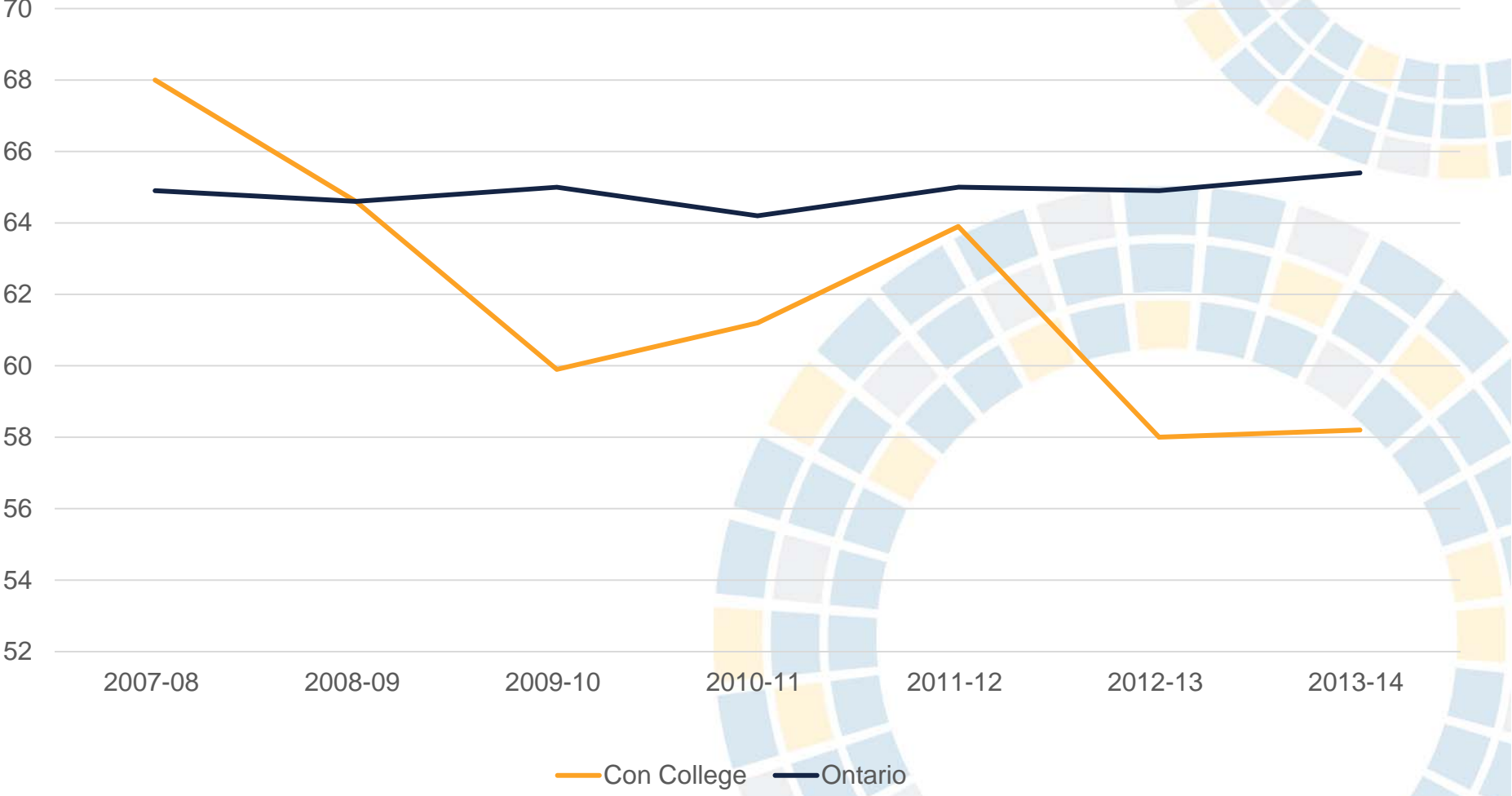
Bad - Employer Satisfaction Rate



Bad - Loan Default Rates



Bad? - Graduation Rate



Education inflation: More students getting university credentials

Census 2006	Less than highschool %	Apprenticeship or trades certificate or diploma %	College, CEGEP or other non-university certificate or diploma %	University certificate, diploma or degree
Thunder Bay	26.7%	11.5%	19.8%	13.9%
Rainy River	30.2%	11.6%	17.5%	9.3%
Kenora	38.6%	10.3%	15.9%	8.6%
Northwestern Ontario	30.1%	11.2%	18.6%	12.1%
Ontario	22.2%	8.0%	18.4%	20.5%
NHS 2011	Less than highschool %	Apprenticeship or trades certificate or diploma %	College, CEGEP or other non-university certificate or diploma %	University certificate, diploma or degree
Thunder Bay	22.7%	11.3%	22.4%	16.1%
Rainy River	27.0%	11.9%	20.8%	10.4%
Kenora	31.2%	11.1%	18.7%	11.2%
Northwestern Ontario	25.2%	11.3%	21.3%	14.4%
Ontario	18.7%	7.4%	19.8%	23.4%

Does distance matter?

Using nation-wide data, Frenette (2002) used econometric analysis to show that, after controlling for family income, parental education, and other factors associated with university participation, students living “out-of-commuting distance” are far less likely to attend than students living “within commuting distance” are. Students beyond 40 km from a university (35% of the student population) are only 63% as likely to attend university shortly after high school as students living within 40 km from a university. Students living beyond 80 km from a university are only 58% as likely to attend as students living within 40km.

Frenette (2003) finds that students living near a college only are more likely to attend college than those living near both a university and a college.

Potential student pool shrinking too

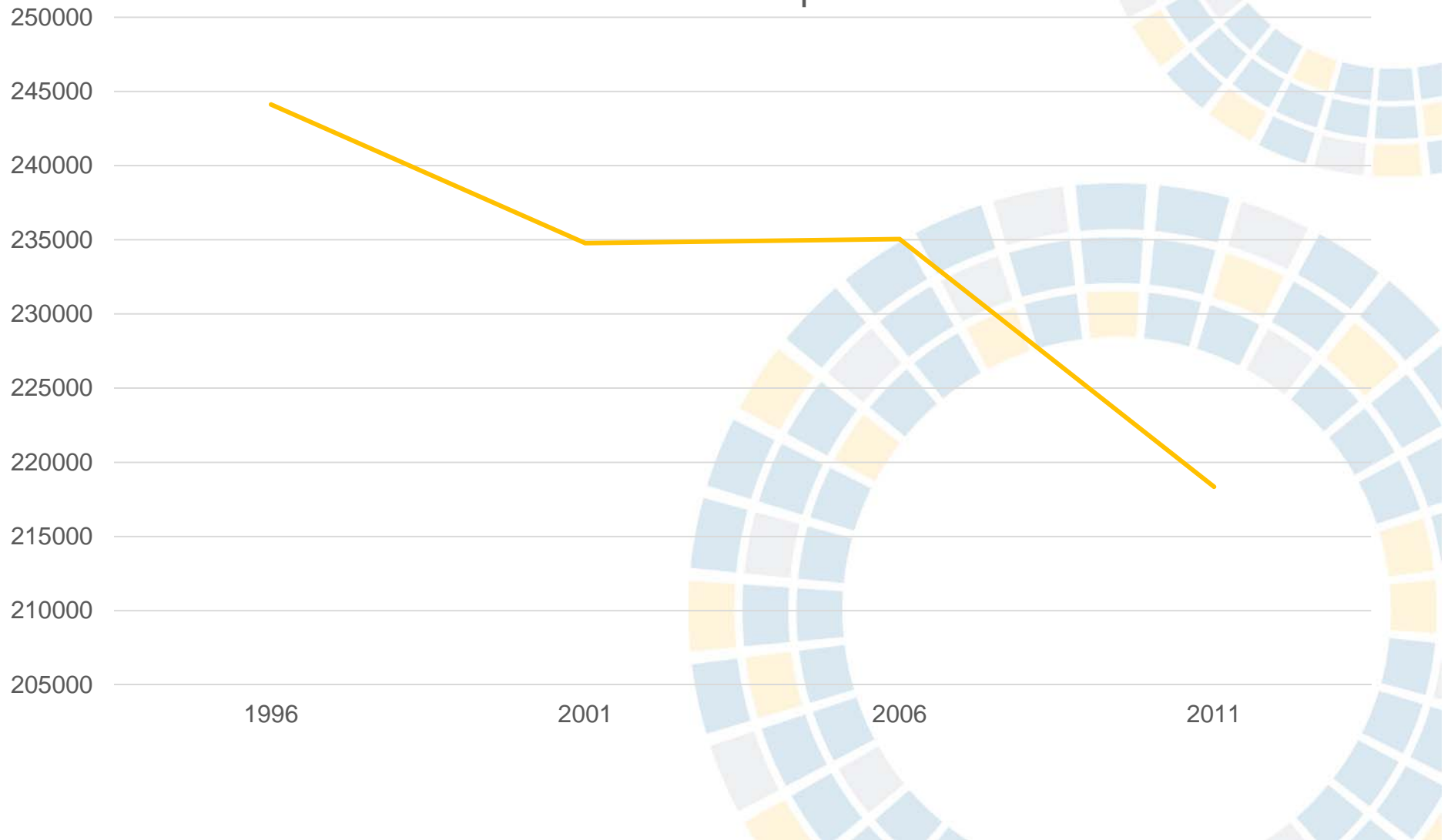
Enrolment in Public Elementary and Secondary Schools:

- Canada down **9000** students since 2007
- Ontario down **44,000** students since 2007
- Northern Ontario down **2500** students in just **ONE** year (11/12)
- Northwestern Ontario down **1050** students in that same year

The situation is so bad that the Department of Education is looking to accelerate school closure process.

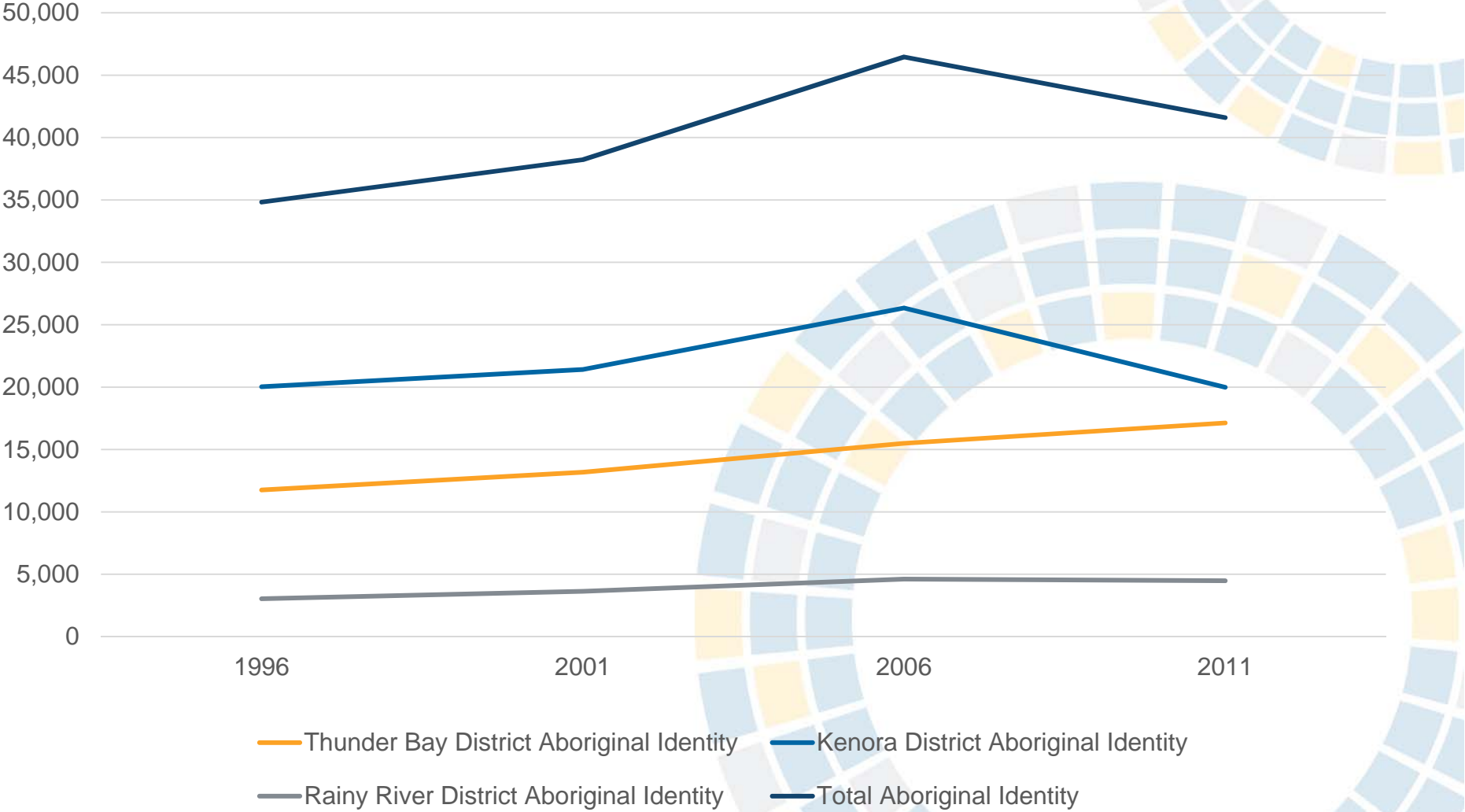
Total Population Declining

Northwestern Ontario Population Total

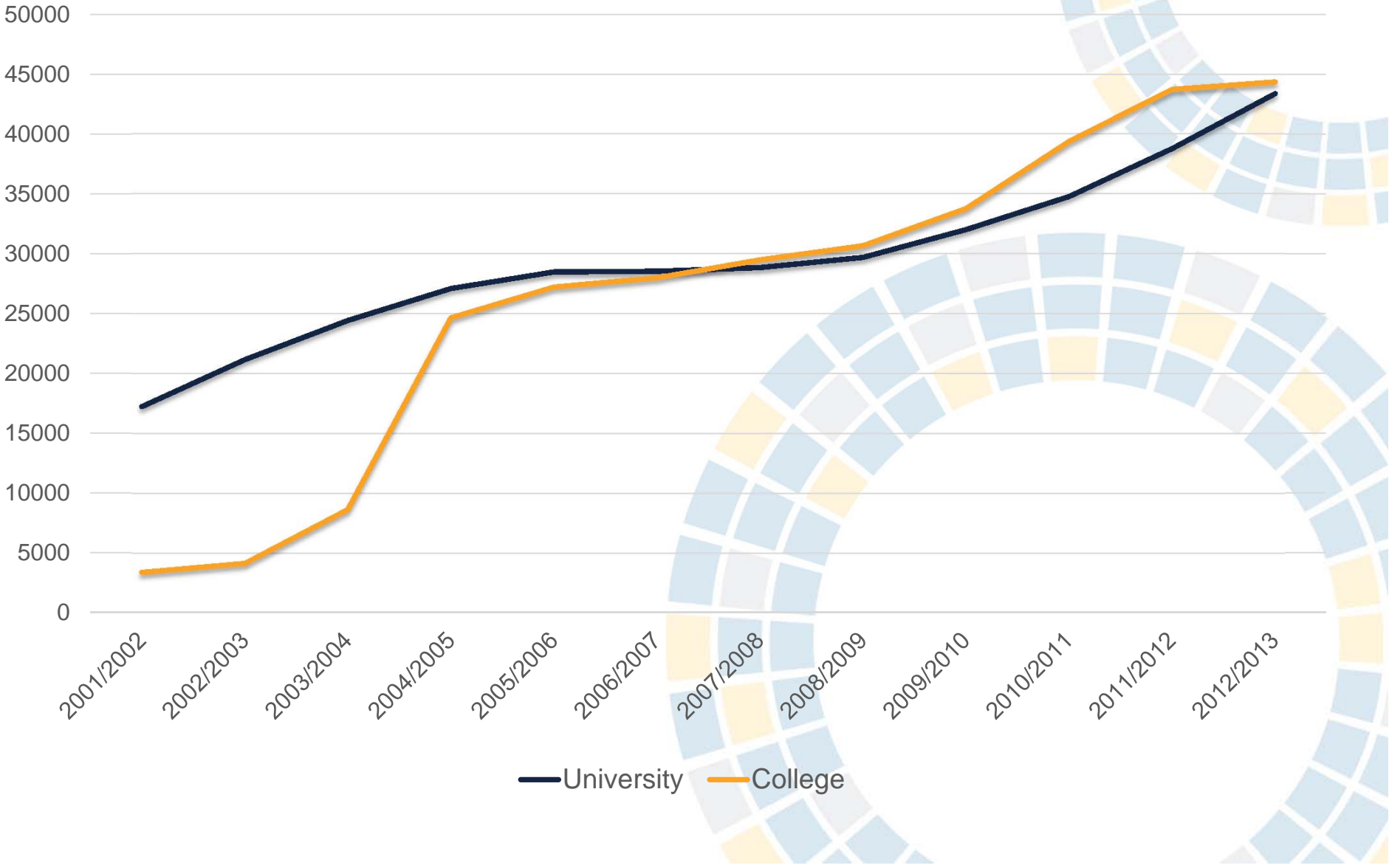


Aboriginal population may be stabilizing

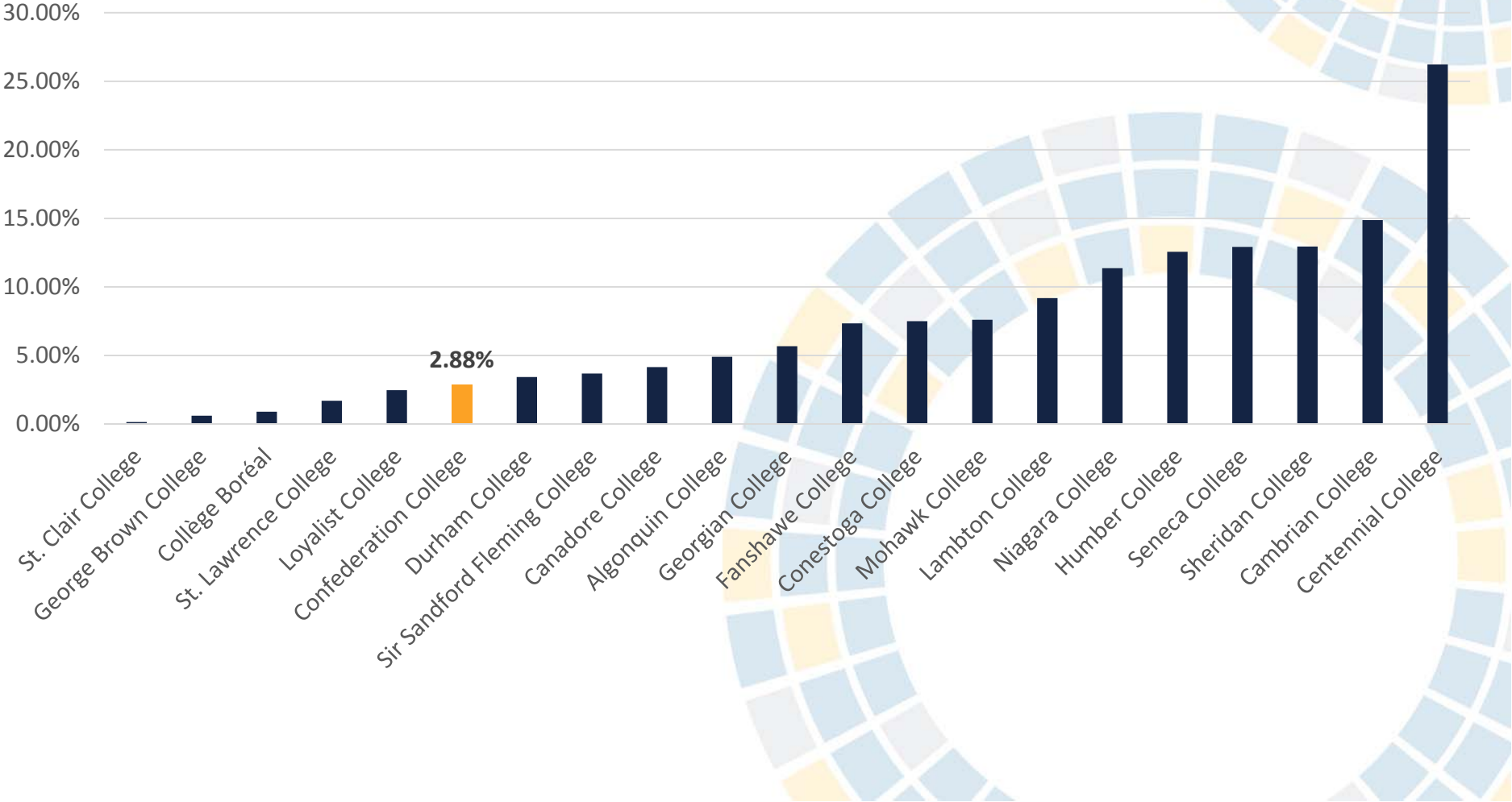
Aboriginal Population by District



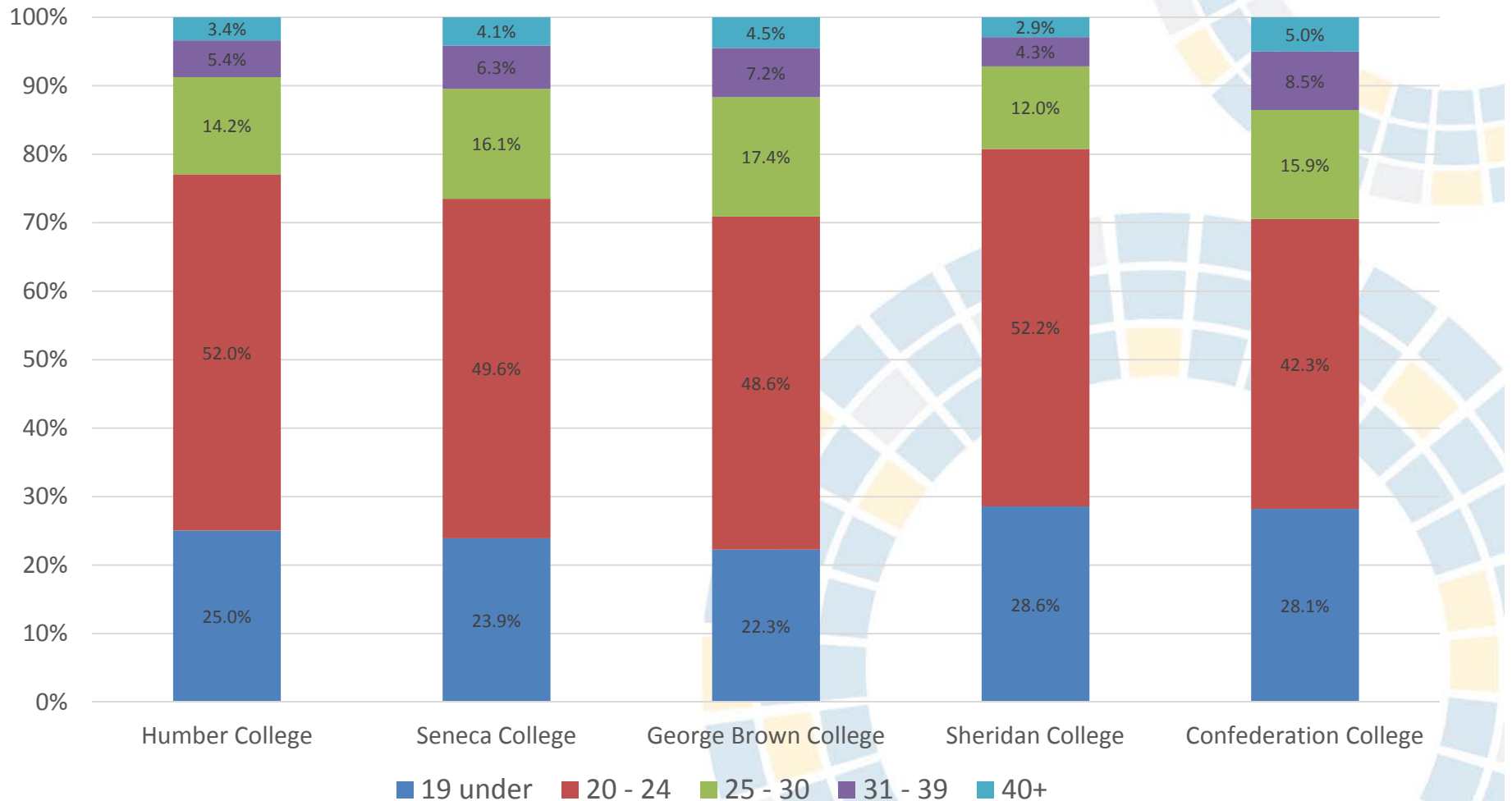
Foreign Student Enrolment: Ontario



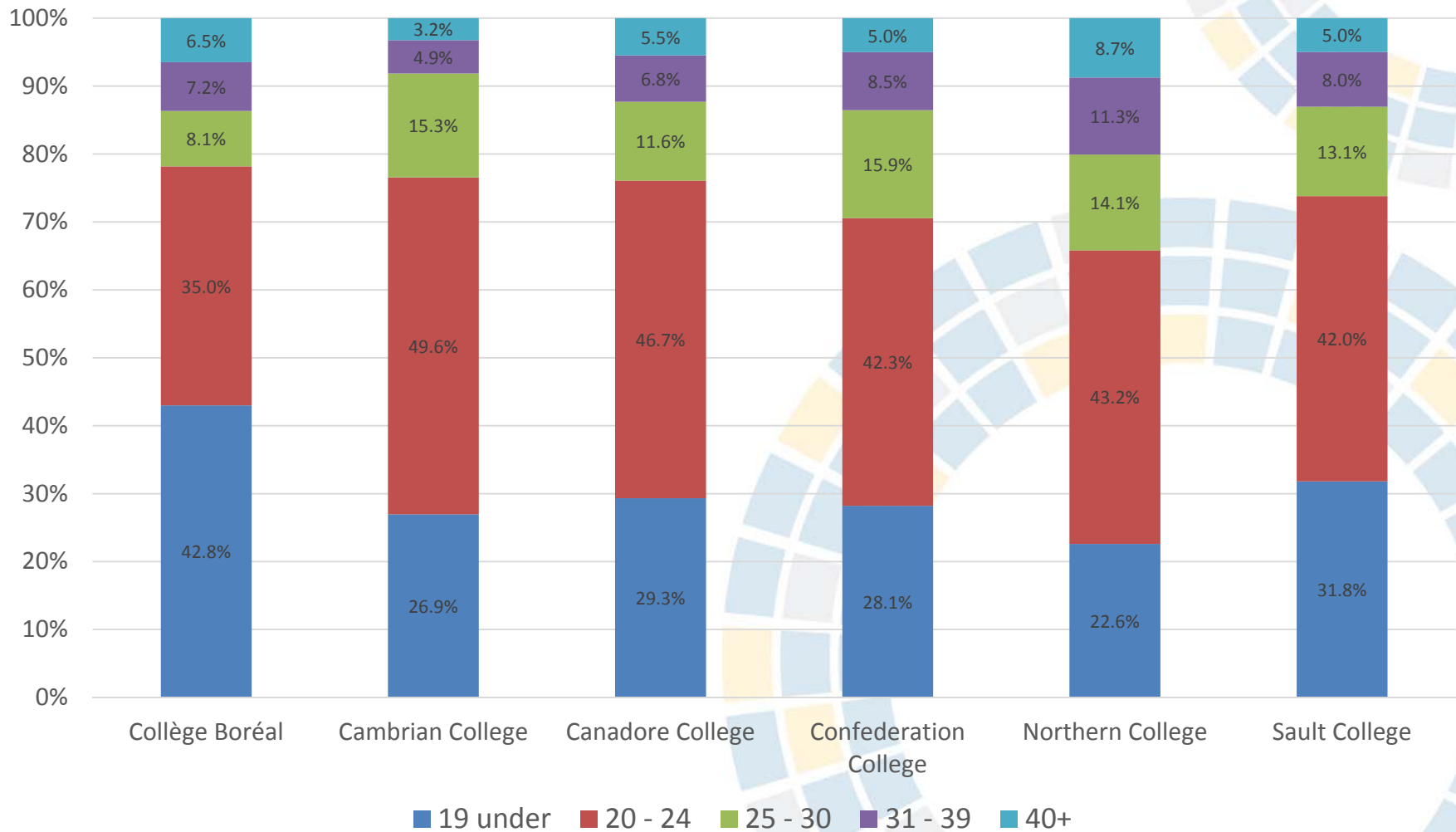
Proportion of Students with Student Permit/Visa Fall 2012-13



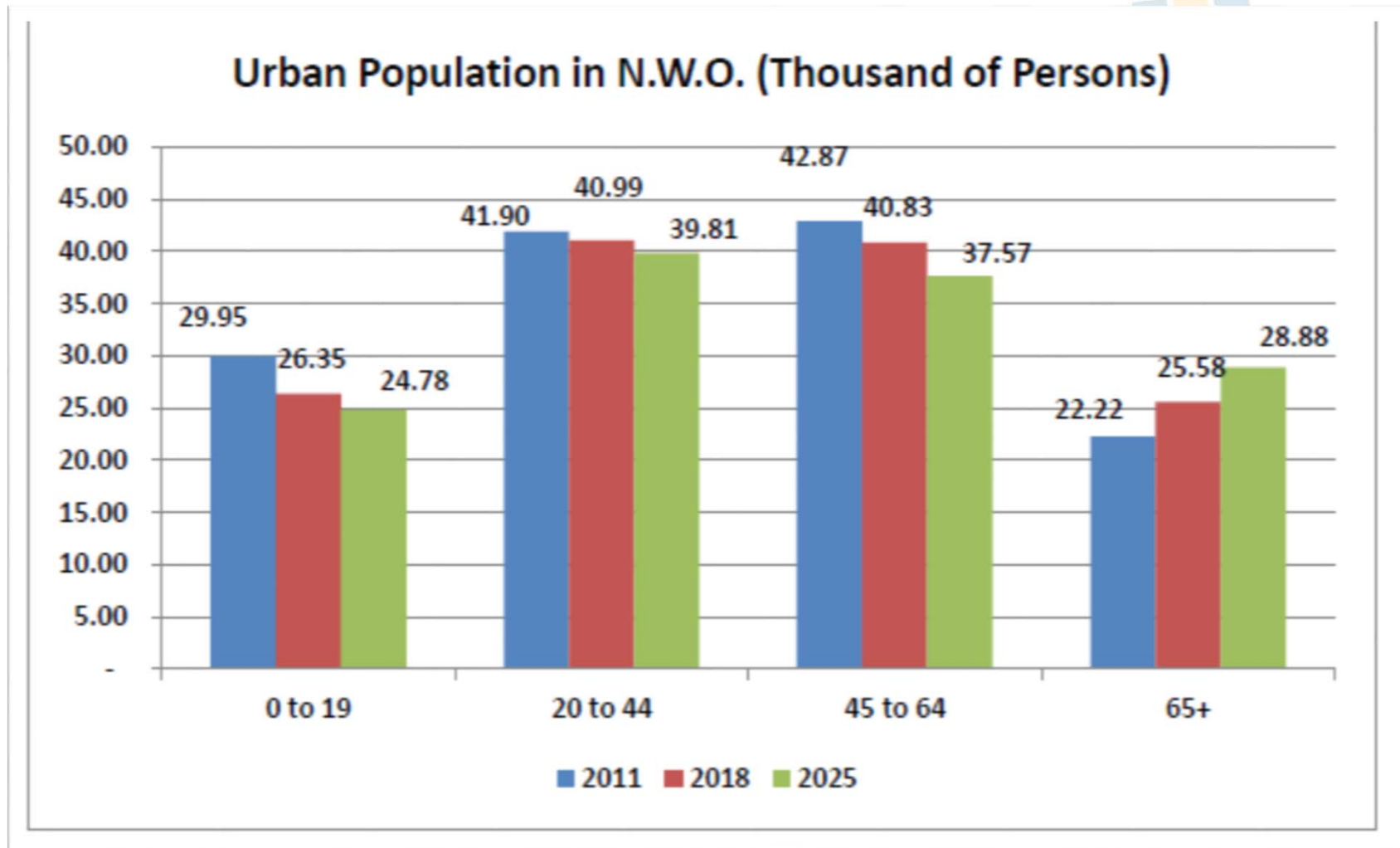
Result: College students getting older



The 6 Northern Colleges – Age Distribution Fall 2012-2013



Urban Population Projection



A quick note on the job market

	Thunder Bay CMA	Rainy River CD	Kenora CD
Public Administration	10% increase since 2005 (2100 jobs)	36% increase since 2001 (240 jobs)	37% increase since 2001 1050 jobs
Education Services	13% increase since 2005 (700 Jobs)	-19% drop since 2001 (-135 jobs)	9% increase since 2001 180 jobs
Professional, Scientific & Technical	80% increase since 2005 (1800 jobs)	-35% drop since 2001 (-70 jobs)	-6% drop since 2001 -35 jobs
Manufacturing	20% annual increase in each of 2011, 2012, 2013 (1900 jobs)	-65% drop since 2001 (-1085 jobs)	-66% drop since 2001 -1870 jobs
Health care and social services	4% increase since 2005 (400 jobs)	13% increase since 2001 (155 jobs)	28% increase since 2001 (985 jobs)
Information and cultural industries	-16% drop since 2005 (500 jobs)	-28% drop since 2001 (-45 jobs)	36% increase since 2001 (100 jobs)

Sources:
2001 Census, 2011 NHS.
LFS Table 282-0112

A word of warning – supply side risk

Working Age Population (20-64)	1996	2015	2025	2035	Difference from 2015-2025
Canada (x1000)	17458.5	22229.2	22667.5	23391.6	1162.4
Ontario (x1000)	6507.2	8545.3	8762	8898.6	353.3
Northwestern Ontario	142775	145480	134110	124770	-20710
Northeastern Ontario	246605	335310	303110	279330	-55980
Thunder Bay	94,365	93190	84120	77720	-15470

Sources:

1996 Census.

CANSIM Table 052-0005.

Statistics Canada/Ministry of Finance- *Ontario Population Projections Update, 2012-2036.*

You are on the right track



Your strategic directions reflect the known realities

- Make it **EASY** to get to you.
- Put the college in the students **BACK YARD**.
- Recognize **LIFE AND EXISTING SKILLS** for credit
- Bond with the student, their community, their family **AND THEIR EMPLOYER**.

Support and expand workplace learning and apprenticeships –
WORKING AND LEARNING

Don't overbuild for current demand – build **FLEXIBLY**, and partner

Work with employers to combat (educational) **INFLATION**

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