

Higher Education
Quality Council
of Ontario



An agency of the Government of Ontario

Ontario's Domestic Postsecondary Enrolment: Examining Recent Trends to Inform Policy and Planning

Sophie Lanthier, Alana Button and
Amy Kaufman

Published by:

The Higher Education Quality Council of Ontario
88 Queens Quay West, Suite 2500
Toronto, ON, M5J 0B8, Canada

Phone: (416) 212-3893 | Fax: (416) 212-3899

Web: www.heqco.ca | **E-mail:** info@heqco.ca

Cite this publication in the following format:

Lanthier, S., Button, A., & Kaufman, A. (2025) *Ontario's Domestic Postsecondary Enrolment: Examining Recent Trends to Inform Policy and Planning*. Higher Education Quality Council of Ontario.

Acknowledgements

HEQCO team members Alastair Woods and Julia Colyar contributed to the development of this report.



An agency of the Government of Ontario

The opinions expressed in this research document are those of the authors and do not necessarily represent the views or official policies of the Higher Education Quality Council of Ontario or other agencies or organizations that may have provided support, financial or otherwise, for this project. © King's Printer for Ontario, 2025.



Table of Contents

Research Questions and Methodology	6
Findings.....	6
PSE Student Profiles and Diversities	7
Canadian Domestic PSE Enrolment Trends by Sector, Credential and Field of Study	8
Discussion.....	15
Understanding Declining College Enrolments.....	15
Fiscal Constraints and High-cost Programs.....	16
Planning for New Enrolments.....	16
Conclusion	17
References.....	18



List of Tables

Table 1 *Domestic Student Enrolments from 2015 to 2022 at Colleges and Universities in Canada, Ontario, Alberta and BC* 9

Table 2 *Ontario Domestic Student Enrolment from 2012 to 2021 by Credential*..... 12

Table 3 *Domestic Enrolments from 2015 to 2022 Across STEM and BHASE Fields*.. 14

Table 4 *Postsecondary Participation Rates of Adults Aged 18 to 24 Years from 2016 to 2021 in Canada, Ontario, Alberta and BC* 27

Table 5 *College and University Participation Rates of Adults Aged 18 to 24 years from 2016 to 2021 in Canada, Ontario, Alberta and BC* 28

Table 6 *Annual Percentage of Domestic Student Enrolments by Gender at Colleges and Universities from 2017 to 2022 in Ontario, Alberta and BC from 2017 to 2022*..... 29

Table 7 *New Domestic Enrolments for Indigenous and Non-Indigenous Students from 2015 to 2021 in Canada, Ontario, Alberta and BC* 31

List of Figures

Figure 1 *Enrolment Actuals and Projections for Ontario's Universities and Colleges from 2012 to 2046* 26



Ontario's postsecondary education (PSE) institutions are navigating a period of significant financial uncertainty. There have been no increases to operating grants since 2017, coupled with a tuition rollback and freeze in 2018.¹ Institutions' ability to manage costs and ensure financial sustainability is constrained by the Ministry of Colleges, Universities, Research Excellence and Security's (MCURES) corridor funding model, which limits enrolment growth,² and is further exacerbated by federal immigration policy changes that restrict international student enrolments and revenue. In this environment of significant fiscal constraint, MCURES is working with institutions to develop the fourth generation of Strategic Mandate Agreements (Harrison, 2023).

Adding to these pressures, demand for PSE spaces is expected to grow in Ontario. The Ministry of Finance's (MOF) population projections signal that the total population of the province is projected to increase by 6.5 million by 2051 (MOF, 2024b).^{3,4} The population of 18- to 24-year-olds, the age group most likely to attend PSE, is expected to grow by approximately 751,000 people in the next 24 years, marking the end of a decade of stagnation (MOF, 2024a).⁵ This growth is expected to start imminently and continue through to 2046, when the population of this age group will reach 2.2 million (Choi & Hou, 2023; Usher & Balfour, 2024; Zwaagstra et al., 2023). Using the MOF projections, HEQCO estimates a need for an additional 225,000 domestic PSE seats by 2046. By this estimation, Ontario's PSE enrolments are expected to grow by 45%, reaching 725,000 students⁶ by 2046.

¹ Since 2008, nominal operating grants for per student funding have not increased appreciably.

² Current enrolment envelope funding in MCURES's Core Operating Grant (COG) flows through a corridor mechanism. Each institution receives COG funding associated with corridor midpoints, which are calculated using five-year moving enrolment averages. Institutions who exceed their midpoint moving averages do not receive additional enrolment funding; institutions who do not meet midpoints receive full midpoint funding, provided enrolments do not fall below the allowable floor.

³ Ontario MOF projections incorporate demographic trends — base population, births, deaths and five types of migration — by census division and sex. The five types of migration are immigration, emigration, net change in non-permanent residents, interprovincial in- and out-migration and intra-provincial in- and out-migration. Assumptions about births, deaths and migration are derived from the analysis of long-term and recent trends, as well as expectations for future direction (MOF, 2024a).

⁴ Ontario's population is expected to grow from 15.6 million to 22.1 million between 2022 and 2051. The GTA is expected to reach 10.4 million by 2051, up from 7.4 million (MOF, 2024b).

⁵ This estimate was derived using MOF's Ontario's 2023 population projections, before Canada's 2023 immigration targets were revised.

⁶ HEQCO's projections indicate that the majority of the domestic PSE spaces (more than 200,000 of the estimated 225,000) will be needed in the university sector. For more details on HEQCO enrolment projections, please see Appendix A.



Anticipating how the estimated 225,000 additional seats will be distributed across the province's university and college programs is crucial for managing Ontario's PSE system and preparing infrastructure and program offerings. To support MCURES's planning for the increased demand for domestic PSE spaces, HEQCO analyzed domestic enrolment trends in Ontario and Canada from 2015 to 2022. This report provides an overview of college and university enrolment patterns, trends in PSE access and the challenges of high-cost programming. Finally, we offer a discussion of the important policy and data considerations raised by these findings.

Research Questions and Methodology

HEQCO explored the following research questions:

1. What were the PSE domestic enrolment trends in Ontario and other jurisdictions in Canada between 2015 and 2022?⁷
2. How do these trends inform future domestic enrolment planning for MCURES and Ontario institutions?

HEQCO used data from MCURES and Statistics Canada's (2023) Postsecondary Student Information System (PSIS) to examine enrolment trends. In addition to national data, provincial data for Ontario, BC and Alberta were reviewed. Alberta and BC were chosen as comparator jurisdictions for Ontario due to their population sizes and the structure of their PSE sectors.

Findings

Broad PSE participation and student demographic trends for Canada and Ontario provide the context for a more detailed review of enrolment trends. Domestic PSE enrolment in Canada was relatively stable between 2015 and 2022. In 2021-22, domestic enrolment across Canadian colleges and universities totaled 1.78 million,

⁷ The time frame of 2015-2022 represents the most complete public data available at the writing of this report. Data reported on enrolment by Ontario credentials uses a 2012-2021 timeframe.



down 0.9%⁸ from total enrolment in 2015-16 (Statistics Canada, 2024a). PSE participation rates — the share of eligible individuals in a population that choose to pursue PSE — were also relatively stable in Canada, rising slightly from 43% to 46% between 2016-17 and 2021-22 (Statistics Canada, 2024b).⁹ The slight increase occurred despite a decreasing youth population in Canada: The number of 18- to 21-year-olds dropped by about 1% between 2012 and 2021 (Choi & Hou, 2023; Usher & Balfour, 2024; Zwaagstra, 2023). Ontario's PSE participation rate for 18- to 24-year-olds was the highest in Canada between 2016 and 2022, ranging from 46% to 48% (Statistics Canada, 2024b).

PSE Student Profiles and Diversities

Since the early 2000s, women have outnumbered men in PSE institutions (Fortin, Oreopoulos & Phipps, 2015; Frenette & Zeman, 2007). In 2021-22, women constituted 55–59% of university enrolments and 52–60% of college enrolments nationally (Statistics Canada, 2024a).¹⁰ In Ontario, women university enrolments increased from 56% to 57% between 2017 and 2022; women college enrolments increased from 55% to 58% over the same time.

The students enrolled in PSE in Canada and Ontario are from diverse backgrounds (Statistics Canada, 2021, 2022; Usher & Balfour, 2024). Nationally, the proportion of domestic PSE students from racialized backgrounds increased from 30% of total domestic enrolment in 2014-15 to 34% in 2021-22 (Statistics Canada, 2024e). In Ontario, the proportion of students identifying as racialized grew from 38% to 44% during this period. South Asian students (32%) made up the largest group, followed by Chinese students (17%) and Black students (16%).

Most PSE students in Canada (66%) and Ontario (71%) in 2021-22 were between the ages of 17 and 24 (Statistics Canada, 2024c). That said, recent evidence points to a growing trend of older students returning to PSE on a part-time basis to upskill and

⁸ 2015-16 total domestic enrolment in Canada was 1,802,439. In 2021-22, total enrolment was 1,787,115 (Statistics Canada, 2024a).

⁹ See Appendix A, Table 5 for participation rates of 18- to 24-year-olds in Canada, Ontario, Alberta and BC by institution type. Appendix A, Table 4 shows overall participation rates for Canada and by province.

¹⁰ Appendix A, Table 6 provides annual domestic enrolment counts by gender and province between 2017 and 2022.



enhance their credentials (Colleges Ontario, 2017, 2021; Harrison, 2017). While both colleges and universities are motivated to expand flexible, part-time and short-term credential programs to meet the needs of lifelong learners (Cote & White, 2020; Pichette et al., 2019), mature students are particularly prominent in the college sector. Students aged 26 and older make up a growing portion of the college student population (Colleges Ontario, 2017; 2022; Jafar, 2022).

PSE pathways are as diverse as learners themselves. Eight percent of students (approximately 60,000) transfer between Ontario's universities, colleges and Indigenous Institutes each year (ONCAT, 2022). In 2021, 18% of applicants to colleges held another postsecondary credential (Colleges Ontario, 2022). As the diversity and demographics of students evolve, so too will their enrolment patterns and tendencies.

Canadian Domestic PSE Enrolment Trends by Sector, Credential and Field of Study

Analysis of historical enrolment data can assist in the development of models to inform enrolment growth. Domestic enrolments between 2015-16 and 2021-22, both nationally and in comparator provinces, increased in the university sector and decreased in the college sector. Enrolments in Ontario mirror this broad trend, with enrolment in credentials typically offered in the college sector decreasing and enrolment in bachelor's and postgraduate programs increasing. Enrolments by field follow global trends: BHASE enrolments are falling, while STEM enrolments are on the rise.¹¹

Between 2015 and 2022, Canadian domestic college enrolments dropped by nearly 7% (45,000 fewer enrolments), while university enrolments rose 3% (an additional 31,000 students).¹² These trends were evident across the provinces included in this review (Statistics Canada, 2024a). Table 1 illustrates these trends by year across Canada, Ontario and the comparator provinces.

¹¹ BHASE is comprised of studies in business, humanities, health, arts, social science, education, legal studies, trades, services, natural resources and conservation. STEM is comprised of studies in science, technology, engineering, and mathematics and computer sciences.

¹² More up-to-date data may show fluctuation in enrolment as the system adjusts to the reduced number of international students and institutions modify their domestic enrolment recruitment practices.



Table 1*Domestic Student Enrolments from 2015 to 2022 at Colleges and Universities in Canada, Ontario, Alberta and BC*

	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	% Change 2015- 2022
Universities								
Canada	1,136,721	1,140,507	1,144,005	1,146,279	1,141,998	1,174,392	1,167,507	2.7
Ontario	459,384	462,528	461,271	464,793	465,513	477,255	478,281	4.1
Alberta	114,639	117,291	119,223	122,625	123,963	129,153	126,852	10.7
BC	144,264	142,581	145,605	147,744	145,758	148,140	146,787	1.7
Colleges								
Canada	665,718	658,185	658,650	652,296	639,936	615,954	619,608	-6.7
Ontario	247,494	244,209	249,966	246,924	239,778	227,721	222,255	-10.2
Alberta	53,310	55,218	55,842	55,992	55,212	50,694	51,387	-3.6
BC	84,084	84,108	82,320	81,510	80,730	74,610	75,249	-10.5

Source: Statistics Canada (2024a)

Note: This table shows the annual domestic student fall enrolment headcount for public colleges and universities in Canada, Ontario, Alberta and BC from 2015 to 2022. It should also be noted that enrolments include full- and part-time registration and are based on program counts and not student counts. If a student is enrolled in more than one program as of the snapshot date, then all their enrolments are included in the count.

In Ontario and BC, the decline in college enrolments outpaced growth in university enrolments, resulting in small overall declines of 1% in Ontario and 3% in BC.¹³ Despite enrolment declines in its college sector, Alberta still saw a 6% increase in overall PSE enrolments. This was due to the substantial rise in university attendance, which more than offset the decline in college enrolments. These findings highlight regional differences in enrolment patterns that may be influenced by local demographic and economic shifts.

Trends in PSE participation rates differed for universities and colleges: university participation rates increased by 5% to 9% in Canada, Ontario, BC and Alberta, while college participation rates declined by 2% to 3%, except in Alberta where they remained stable (See Appendix A, Table 5). University participation-rate gains offset declines in college participation rates,¹⁴ resulting in an overall increase in PSE participation rates ranging from 2% to 9% across the provinces studied.

Decreases in domestic Ontario college enrolment were most evident at the sub-baccalaureate level (MCURES, 2022).¹⁵ Enrolments in college certificates¹⁶ decreased by 17%, diploma enrolments decreased by 13% and advanced diploma¹⁷ enrolments decreased by 12% between 2015 and 2022. Domestic enrolments increased in bachelor's degree and postgraduate programs at Ontario colleges. College enrolments in bachelor's degrees increased by 6,680 students and graduate certificate enrolments increased by 2,353.¹⁸ Enrolment increases in these programs do not offset overall decreases. College bachelor's degrees represented 12% of total college enrolments in 2021;¹⁹ graduate certificates represented just over 5% of total enrolments. Diplomas

¹³ The college sector continued to experience enrolment declines in the 2022-2023 fiscal year (MCURES, 2024 a,d; Statistics Canada, 2024a). However, some colleges have reported domestic enrolment increases for 2023-2024 (Morden, 2024; Northern College, 2024; Pedro, 2024; Taylor, 2024).

¹⁴ Alberta experienced participation rate gains across both sectors.

¹⁵ The credentials definitions used by Statistics Canada's PSIS (2023) follow the [International Standard Classification of Education](#) and differ from those used by Ontario's PSE institutions. To provide Ontario-specific insights, we used MCURES data from 2012 to 2021 to examine domestic enrolment variations by Ontario PSE credentials (MCURES, 2022).

¹⁶ Ontario college certificates are typically one year in duration.

¹⁷ Diploma programs are typically two years in duration, while advanced diplomas are typically three years.

¹⁸ These modest increases in enrolment numbers result in large percentage gains due to the relatively small initial enrolments for both credentials. Specifically, enrolments in bachelor's degrees and graduate certificates grew by 45% and 34%, respectively.

¹⁹ College bachelor's degrees represent 5.8% of total bachelor's degree enrolments (college and university) in Ontario.



and advanced diplomas — despite declining by 13% and 17% respectively since 2012-13 — comprised 72% of total domestic college enrolments in 2021.

In the Ontario university sector, all credentials showed domestic enrolment growth, pointing to a steady demand for university education across credentials. This is aligned with broader trends in the labour market that favour advanced qualifications (Colyar et al., 2022; Future Skills Centre, 2022). Table 2 displays enrolments²⁰ in Ontario colleges and universities by credential from 2012 to 2021.

²⁰ MCURES (2022) data includes full-time headcount enrolments, while Statistics Canada (2024a) includes both full- and part-time students. As a result, the MCURES enrolment counts are lower than Statistics Canada (2024a) totals included in Table 1.



Table 2*Ontario Domestic Student Enrolment from 2012 to 2021 by Credential*

	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	% Change 2013- 2021
College										
Certificate	23,014	24,521	24,150	23,869	22,543	23,596	23,644	21,692	19,029	-17
Diploma	96,471	98,534	96,990	96,432	93,045	93,736	91,278	89,272	83,750	-13
Advanced Diploma	51,809	52,865	52,353	52,013	51,257	51,092	49,587	47,543	44,333	-12
Bachelor's Degree	14,719	16,187	17,421	18,561	19,524	20,425	20,816	20,897	21,399	45
Graduate Certificate	6,936	7,760	7,532	8,024	8,165	8,615	8,583	8,164	9,289	34
University										
Bachelor's Degree	331,578	334,244	334,107	335,594	339,025	339,717	341,340	341,096	347,466	5
Master's/ Doctoral Degree	41,733	42,397	42,797	43,766	44,853	45,980	47,083	47,969	49,664	19

Source: MCURES (2022)

Note: This table shows the fall full-time domestic student enrolment for different credentials in Ontario from 2012 to 2021.

Analyzing enrolment trends by fields of study offers further insight into evolving student preferences and highlights which programs are most in demand. This information shows areas of alignment between PSE program uptake, government priorities and labour market demand in the STEM, healthcare and skilled trades sectors (Council of Ministers of Education Canada, 2021; Government of Ontario, 2023).

PSIS data for enrolments from 2015 to 2022 show that STEM and BHASE proportions shifted over time. Table 3 displays STEM and BHASE enrolment trends by year across the country and by province. STEM enrolments grew while BHASE enrolments declined (AUCC, 2011; Council of Ministers of Education Canada, 2021; Choi & Hou, 2023; Statistics Canada, 2024c). The sole exception to this trend is Alberta, where BHASE enrolments rose by 5%. Unlike BC and Ontario, Alberta has experienced significant growth in its youth population, which, combined with economic expansion, may be driving enrolment growth in both fields (Choi & Hou, 2023; Zwaagstra et al., 2023). The rise in STEM enrolments across all examined provinces aligns with government priorities to boost the number of STEM graduates entering the workforce.



Table 3*Domestic Enrolments from 2015 to 2022 Across STEM and BHASE Fields*

	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	% Change 2015- 2022
STEM								
Canada	388,512	397,149	403,767	406,425	410,487	423,618	429,963	11
Ontario	172,206	178,449	184,566	185,877	187,362	191,844	192,636	12
Alberta	33,819	34,455	34,845	35,352	35,484	36,327	37,164	10
BC	43,599	43,755	44,328	44,922	45,219	47,055	48,288	11
BHASE								
Canada	1,343,604	1,338,222	1,331,838	1,324,635	1,309,944	1,313,256	1,297,281	-3
Ontario	494,022	493,800	488,430	485,805	479,973	479,703	468,486	-5
Alberta	134,127	138,054	140,217	143,262	143,694	143,523	141,075	5
BC	177,450	175,080	175,923	176,163	173,955	170,802	168,723	-5

Source: Statistics Canada (2024c)

Note: This table shows the number of students enrolled in STEM and BHASE programs in Canada, Ontario, Alberta and BC from 2011 to 2021.

Discussion

Enrolment in specific sectors, fields and credentials is shaped by many factors, including government and institutional policy, demographic trends, socio-cultural factors and labor market conditions. The Ontario government's emphasis on developing skilled workers with STEM, healthcare and trades backgrounds, for example, could drive student enrolment and program expansion in these areas (MCURES, 2024e; Office of the Premier, 2024). Economic factors such as higher unemployment rates could drive more Ontarians to pursue PSE directly from high school or mid-career for reskilling or upskilling. This examination of enrolment trends does not capture all of the complexities of student enrolment decisions but offers broad insights that can help government and institutions prepare for the estimated PSE enrolment increases over the next 25 years.

Latest trends in Ontario's PSE enrolments show that students are increasingly older, diverse and women. Enrolments are rising in STEM fields, while fewer students are enrolling in college sub-baccalaureate programs. These data should inform policy discussions about the future of higher education in Ontario, including the renegotiation of Strategic Mandate Agreements in early 2025 and the funding formula review scheduled for 2026-27 (MCURES, 2024c). Discussions about long-term sustainability in the sector and the funding of new spaces at colleges and universities should be pursued in the context of historical enrolment trends and future projections.

The enrolment trends outlined in this report raise important considerations that can be explored in sector consultations and discussions.

Understanding Declining College Enrolments

Planning for new domestic college enrolments starts with understanding the downward enrolment trend Ontario colleges experienced between 2015 and 2022. The question of why college domestic enrolments are declining is worth investigating, not only to inform attempts to reverse this trend, but also to paint a clearer picture of students' motivations when they pursue PSE. Ontario's colleges offer exceptional programming, and their students have good rates of postgraduate employment. Attempts to expand program and credential offerings have had limited impact on overall enrolment and revenue, adding new costs for program offerings that do not generate significant revenue gains



(Snowdon, 2022). College enrolment declines have been observed in some provinces but not others, suggesting that enrolment changes are likely more influenced by the push and pull of local economic, political and social conditions than by larger national or international currents.

Planning for new Ontario college domestic enrolments takes on added urgency considering the recent federal changes to international student policy. While both colleges and universities are facing significant revenue shortfalls due to fewer international enrolments, the impact on Ontario's publicly assisted colleges is far more severe due to their reliance on international enrolments (Statistics Canada, 2024f). Even with new domestic enrolments expected with population increases, colleges cannot resolve budget gaps once filled by international tuition revenue. Domestic enrolments do not generate the required revenue, through tuition and government grants, to sustain high-cost programming and ensure student access and success.

Fiscal Constraints and High-cost Programs

Increased STEM enrolments are not surprising as governments of all jurisdictions have promoted STEM disciplines during the expansion of the tech sector and subsequent job opportunities for STEM graduates. Changes in the economic landscape and advancements in artificial intelligence will likely fuel future enrolment demand. However, the costs of mounting and operating STEM programs are high in comparison to other disciplines and are prohibitive in the absence of appropriate levels of funding. Consideration will need to be given to the level of support provided through operating grant funding as well as tuition flexibility to ensure that the demand for spaces can be met at a time of urgent need for these graduates in Ontario and across Canada.

Planning for New Enrolments

Ontario boasts a relatively high participation rate for PSE. Two decades of focus on access have helped ensure that students from all sociodemographic backgrounds are able to pursue a high-quality PSE that prepares them for promising careers in many sectors. Without planning and funding for new spaces, application processes will become increasingly competitive and Ontario students may not have access to the programs they are most interested in pursuing.



The last time Ontario had to address large enrolment increases across the PSE sector was in response to secondary school curriculum changes that lead to a “double cohort” of high school graduates in 2003. At the time, government assured students and families that a PSE space would be available for all willing and qualified students. Accommodating double-cohort students required new policies, increases in operating grants and infrastructure investments (Winton & Jones, 2015). The planning timeline for the current anticipated increase in domestic students is different, but the concerns are the same: Higher enrolment demands without institutional capacity create a competitive environment for students and profoundly impact their educational choices and career pathways (King et al., 2005).

Conclusion

Ontario’s PSE sector faces a pivotal moment. Demographic projections indicate that the demand for domestic PSE spaces will rise over the next two decades due to population growth. Analysis of historical PSE participation rates indicate that a higher proportion of the population will choose to pursue PSE. Demand for new spaces, however, will not be evenly distributed across sectors, credentials or programs. Strategic enrolment planning will be crucial, and both government and institutions can use projections and trends like those outlined in this report to inform their decisions about where to invest.

New enrolment demands will challenge Ontario’s PSE system in terms of costs and capacity. The government must determine how to manage the impending growth while maintaining and growing a responsive, high-quality PSE system for Ontarians. This is a moment for the government to work with institutions to ensure that the system remains viable and accessible and contributes to Ontario’s economic productivity.



References

- AUCC. (2011). *Trends in higher education: Volume 1 – Enrolment*. Association of Universities and Colleges of Canada. <https://www.univcan.ca/wp-content/uploads/2015/11/trends-vol1-enrolment-june-2011.pdf>
- Choi, Y. & Hou, F. (2023). *A comparison of postsecondary enrolment trends between domestic and international students by field of study*. Statistics Canada. <https://www150.statcan.gc.ca/n1/pub/36-28-0001/2023009/article/00003-eng.pdf>
- Colleges Ontario. (2017). *2017 Environmental Scan – Student and Graduate Profiles*. <https://www.collegesontario.org/en/resources/2017ES-student-and-graduate-profiles>
- Colleges Ontario. (2021). *2021 Environmental Scan – Student and Graduate Profiles*. <https://www.collegesontario.org/en/resources/2021-environmental-scan-student-and-graduate-profiles>
- Colleges Ontario. (2022). *2022 Environmental Scan – Student and Graduate Profiles*. <https://www.collegesontario.org/en/resources/2022-environmental-scan-student-and-graduate-profiles>
- Colyar, J., Brumwell, S., & Deakin, J. (2022). *Exploring postsecondary credentials and labour market alignment in Ontario*. Higher Education Quality Council of Ontario. <https://heqco.ca/pub/exploring-postsecondary-credentials-and-labour-market-alignment-in-ontario/>
- Cote, A. & White, A. (2020). *Higher education for lifelong learners: A roadmap for Ontario post-secondary leaders and policymakers*. Ontario 360. https://on360.ca/wp-content/uploads/2020/12/ON360_HigherEducation_v3.pdf
- Council of Ministers of Education Canada. (2021). *Trends in STEM and BHASE graduates from public postsecondary institutions across Canadian provinces and territories 2010 to 2018*. https://www.cmec.ca/Publications/Lists/Publications/Attachments/420/STEM_BHASE_graduates_report_Final_EN.pdf



- Council of Ontario Universities. (2024). *Funding enrolment growth to support Ontario students and economic growth*.
- Fortin, N. M., Oreopoulos, P., & Phipps, S. (2015). Leaving boys behind: Gender disparities in high academic achievement. *Journal of Human Resources*, 50(3), 549–579. <https://jhr.uwpress.org/content/50/3/549>
- Frenette, M. & Zeman. K. (2007). *Why are most university students women?: Evidence based on academic performance, study habits and parental influences*. Statistics Canada. <https://www150.statcan.gc.ca/n1/en/pub/11f0019m/11f0019m2007303-eng.pdf?st=nWmydk0N>
- Future Skills Centre. (2022). *The labour market of tomorrow: Projections from the model of occupations, skills, and technology (MOST)*. Toronto Metropolitan University, Blueprint, and The Conference Board of Canada. https://fsc-ccf.ca/wp-content/uploads/2022/10/FSC_the-labour-market-of-tomorrow_EN.pdf
- Government of Ontario. (2023). *Ontario Preparing Students for Jobs of the Future*. Ontario Newsroom. <https://news.ontario.ca/en/release/1002810/ontario-preparing-students-for-jobs-of-the-future>
- Harrison, A. (2023). *Ensuring Financial Sustainability for Ontario’s Postsecondary Sector*. Blue Ribbon Panel on Postsecondary Education Financial Sustainability. <https://files.ontario.ca/mcu-ensuring-financial-sustainability-for-ontarios-postsecondary-sector-en-2023-11-14.pdf>
- Harrison, N. (2017). Patterns of participation in a period of change: Social trends in English higher education from 2000 to 2016. In R. Waller, N. Ingram & M. Ward (Eds.), *Higher Education and Social Inequalities*, pp. 54–80. Routledge. <https://cronfa.swan.ac.uk/Record/cronfa36240>
- Jafar, H.F. (2022). Transition experiences of mature students at Ontario Colleges. *Canadian Journal of Higher Education*, 52(4), 135–148. <https://doi.org/10.47678/cjhe.v52i4.189729>
- King, A., Warren, W., Boyer, J. & Chin, P. (2005). *Double cohort study: Phase 4 report*. Prepared for the Ontario Ministry of Education by Social Program Evaluation Group, Queen’s University. <https://www.edu.gov.on.ca/fre/document/reports/renfrew/report4.pdf>



- Ministry of Colleges, Universities, Research Excellence and Security. (2022). *Postsecondary analytical environment* [Unpublished Dataset].
- Ministry of Colleges, Universities, Research Excellence and Security. (2024a). College enrolment [Data set]. <https://data.ontario.ca/dataset/university-enrolment>
- Ministry of Colleges, Universities, Research Excellence and Security. (2024c). *Ontario's postsecondary education system performance based funding technical manual* [Technical Manual]. Financial Sustainability, Performance and Oversight Division.
- Ministry of Colleges, Universities, Research Excellence and Security. (2024d). University enrolment [Data set]. <https://data.ontario.ca/dataset/college-enrolment>
- Ministry of Colleges, Universities, Research Excellence and Security. (2024e). *Ontario investing nearly \$1.3 billion to stabilize colleges and universities*. <https://news.ontario.ca/en/release/1004227/ontario-investing-nearly-13-billion-to-stabilize-colleges-and-universities>
- Ministry of Finance. (2023). *Population projections* [Data set]. Ontario Data Catalogue. <https://data.ontario.ca/dataset/population-projections>
- Ministry of Finance. (2024a). *Annual update to MOF population projections (2022–2046)* [PowerPoint slides]. Labour Economics Branch.
- Ministry of Finance (2024b). *Ontario population projections*. <https://www.ontario.ca/page/ontario-population-projections>
- Morden, P. (2024). Lambton College's domestic enrolment up as foreign enrolment drops. *The Observer Sarnia*. <https://www.theobserver.ca/news/local-news/lambton-colleges-domestic-enrolment-up-as-foreign-enrolment-drops>
- Northern College. (2024). *Northern College sees domestic enrolment growth, issues over \$700k in scholarships, bursaries and awards*. Northern College. <https://www.northerncollege.ca/news-and-updates/northern-college-sees-domestic-enrolment-growth-issues-over-700k-in-scholarships-bursaries-and-awards/>



- Office of the Premier. (2024). *Ontario investing over \$74 million through next round of skills development fund capital stream*.
<https://news.ontario.ca/en/release/1005311/ontario-investing-over-74-million-through-next-round-of-skills-development-fund-capital-stream>
- ONCAT. (2022). *Transfer and student mobility in Ontario*. Academica Forum.
<https://forum.academica.ca/forum/transfer-and-student-mobility-in-ontario-heres-what-research-tells-us>
- Pedro, P. (2024). St. Clair College sees domestic jump in enrolment, still shy of 2023 totals. *CK News Today*. <https://cknewstoday.ca/chatham/news/2024/09/20/st-clair-college-sees-domestic-jump-in-enrolment-still-shy-of-2023-totals>
- Pichette, J., Tamburri, R., McKeown, J., Blair, K. A. W. & MacKay, E. (2019). *Lifelong Learning in Ontario: Improved Options for Mid-career, Underserved Learners*. Higher Education Quality Council of Ontario. <https://heqco.ca/pub/lifelong-learning-in-ontario-improved-options-for-mid-career-underserved-learners/>
- Snowdon, K. (2022). *College and university baccalaureate degrees: Another look at costs*. Higher Education Quality Council of Ontario. <https://heqco.ca/pub/college-and-university-baccalaureate-degrees-another-look-at-costs/>
- Statistics Canada. (2021). *A portrait of educational attainment and occupational outcomes among racialized populations in 2021*. (Census in Brief, Census of Population, 2021). <https://www12.statcan.gc.ca/census-recensement/2021/as-sa/98-200-x/2021011/98-200-x2021011-eng.pdf>
- Statistics Canada. (2022). *Table 98-10-0429-01. Highest level of education by census year, visible minority and generation status: Canada, provinces and territories, census metropolitan areas and census agglomerations*. [Data table].
<https://doi.org/10.25318/9810042901-eng>
- Statistics Canada. (2023). *Postsecondary student information system (2021/2022)*. [Data set].
https://www23.statcan.gc.ca/imdb/p3Instr.pl?Function=getInstrumentList&Item_Id=1495219&UL=1V



Statistics Canada. (2024a). *Table 37-10-0018-01 Postsecondary enrolments, by registration status, institution type, status of student in Canada and gender*. [Data table]. <https://doi.org/10.25318/3710001801-eng>

Statistics Canada. (2024b). *Table 37-10-0103-01 Participation rate in education, population aged 18 to 34, by age group and type of institution attended*. [Data table]. <https://doi.org/10.25318/3710010301-eng>

Statistics Canada. (2024c). *Table 37-10-0163-01. Postsecondary enrolments, by International Standard Classification of Education, institution type, Classification of Instructional Programs, STEM and BHASE groupings, status of student in Canada, age group and gender*. [Data table]. <https://doi.org/10.25318/3710016301-eng>

Statistics Canada. (2024d). *Table 37-10-0264-01 New entrants to postsecondary education by Indigenous identity, educational qualification, field of study (STEM and BHASE (non-STEM) groupings), gender and age* [Data table]. <https://doi.org/10.25318/3710026401-eng>

Statistics Canada. (2024e) *Table 37-10-0268-01 Canadian postsecondary enrolments by visible minority group, educational qualification, field of study (STEM and BHASE (non-STEM) groupings), gender and age*. [Data table]. <https://doi.org/10.25318/3710026801-eng>

Statistics Canada. (2024f). *Canadian postsecondary enrolments and graduates, 2022/2023*. The Daily. <https://www150.statcan.gc.ca/n1/daily-quotidien/241120/dq241120b-eng.htm>

Taylor, D. (2024). Domestic enrolment up as Sault College faces 'market chill' in international students. *Soo Today*. <https://www.sootoday.com/local-news/domestic-enrolment-up-as-sault-college-faces-market-chill-in-international-students-9674892>

UNESCO. (2017). *International Standard Classification of Education (ISCED)*. <https://uis.unesco.org/en/topic/international-standard-classification-education-isced>



Usher, A., & Balfour, J. (2024). *The state of postsecondary education in Canada, 2024*. Higher Education Strategy Associates. <https://higheredstrategy.com/the-state-of-postsecondary-education-in-canada-2024/>

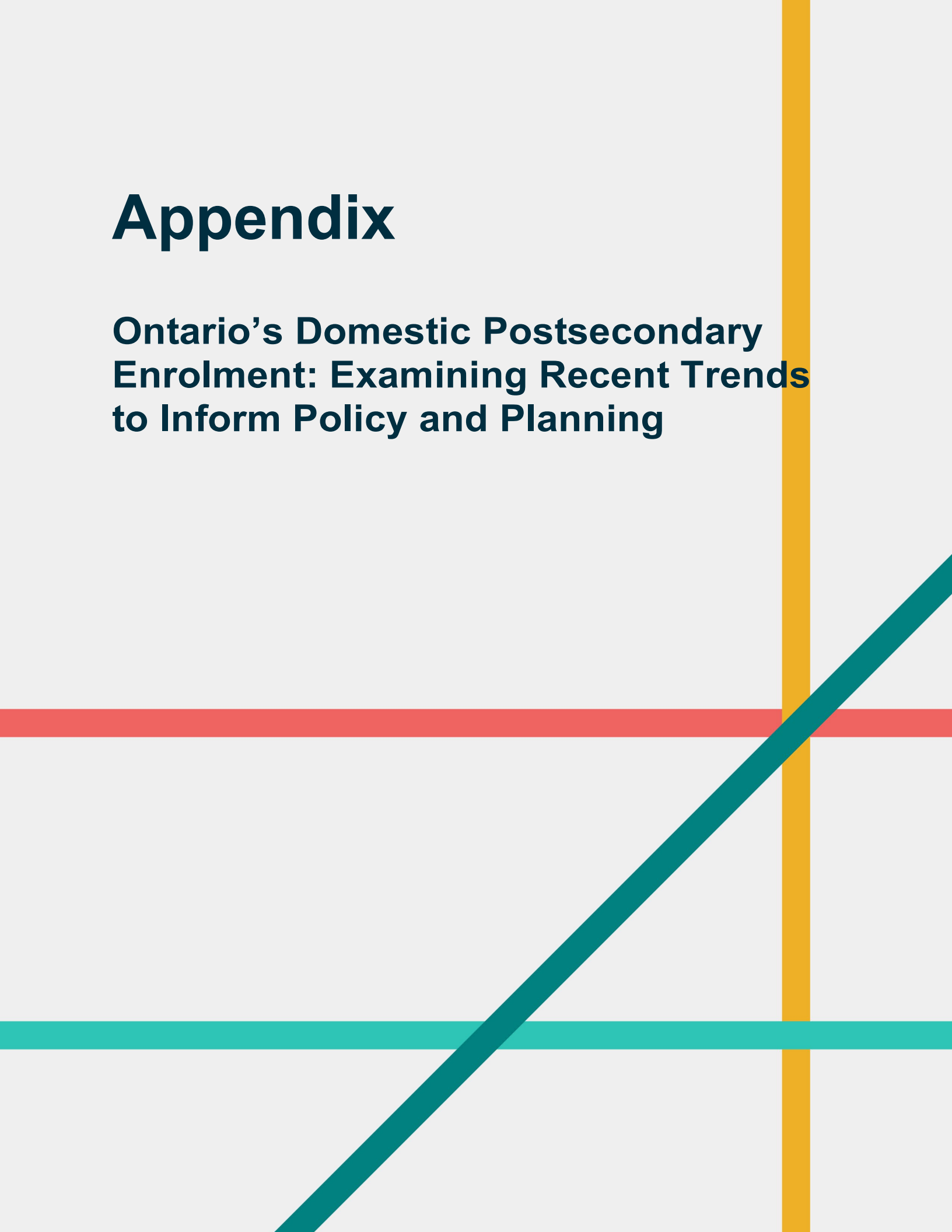
Winton, S. & Jones, G. (2015). Ontario's double cohort. *International Higher Education*, 36, 25–27. DOI:[10.6017/ihe.2004.36.7422](https://doi.org/10.6017/ihe.2004.36.7422)

Zwaagstra, M., Emes, J., Ryan, E., & Palacios, M. (2023). *Where our students are educated: Measuring student enrolment in Canada, 2022*. Fraser Institute. <https://www.fraserinstitute.org/studies/where-our-students-are-educated-measuring-student-enrolment-in-canada-2022#:~:text=In%202019%E2%80%9320%2C%20Newfoundland%20%26,students%20enrolled%20in%20public%20schools.>



Appendix

Ontario's Domestic Postsecondary Enrolment: Examining Recent Trends to Inform Policy and Planning



HEQCO estimated domestic enrolment trends in Ontario's colleges and universities from 2023 to 2046 using the Ministry of Finance's (2024a) population projections for 18- to 24-year-olds and the projected provincial participation rates for this age group calculated using data from Statistics Canada's (2024b) Labour Force Survey. First, we calculated the average annual change in participation from 2005 to 2022, which revealed a 0.3% annual increase for universities and a -0.05% annual decrease for colleges. We applied these changes to the previous year's participation rate to estimate the following year's rate. As a result, college participation is projected to decrease from 13% in 2023 to 11.6% by 2046, while university participation is expected to increase from 33% to 39.8%.

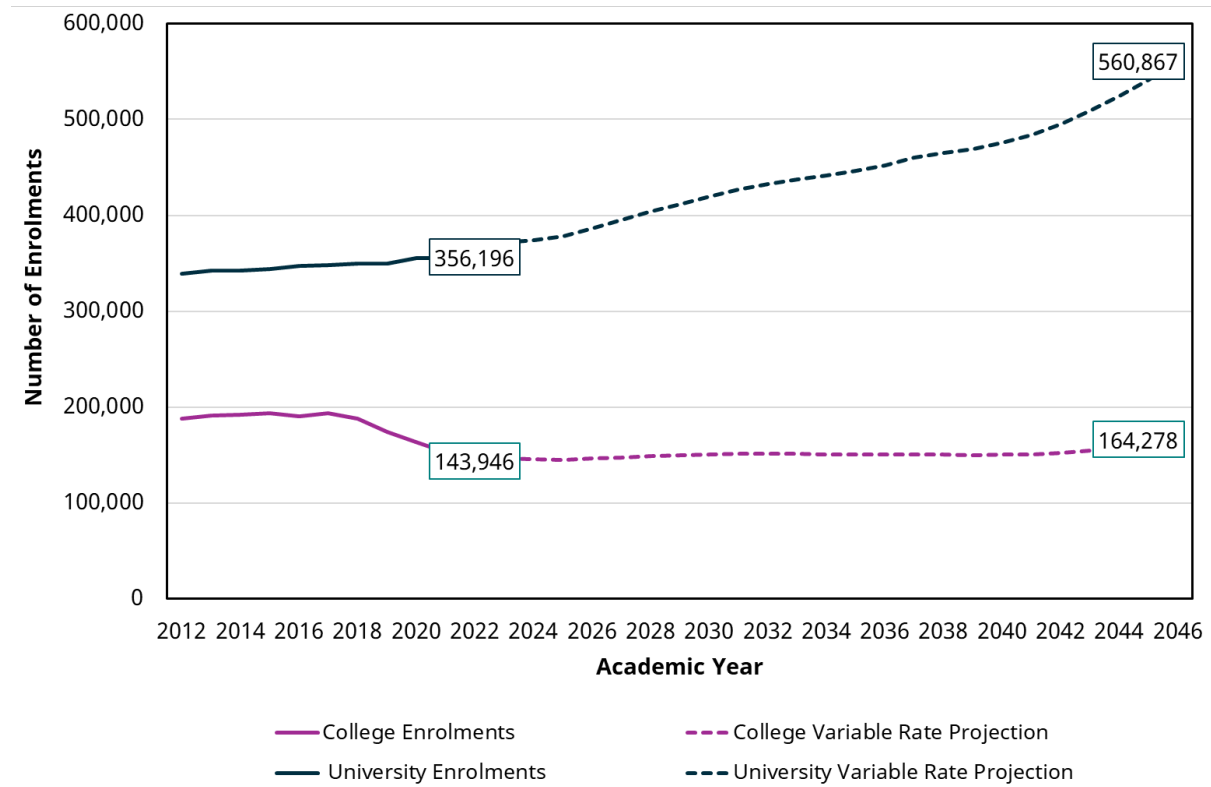
We applied the projected variable participation rates to the Ministry of Finance's projected 18- to 24-year-old population to produce an estimate of enrolment growth from 2023 to 2046. Figure 1 below presents these enrolment projections for Ontario's universities and colleges from 2023 to 2046, alongside actual enrolments from 2012 to 2022 (MCURES, 2024a,d).²¹ By 2046, both sectors are projected to experience enrolment growth, with the university sector seeing a more substantial increase. Despite declining participation rates, Ontario colleges are projected to see a 14% rise in enrolments from 2022, adding 20,332 students for a total of 164,278. Universities are projected to see a 57% increase from 2022, with the addition of 204,671 enrolments, bringing total university enrolments to 560,867. Our projections align with other Ontario PSE forecasts which point to a significant influx of new students (Harrison, 2023), particularly in the university sector (COU, 2024).

²¹ Enrolment data was sourced from MCURES's (2024a,d) open-data portal. [University enrolments](#) reflect fall full-time domestic undergraduate headcounts. [College enrolments](#) reflect fall full-time domestic student headcounts.



Figure 1

Enrolment Actuals and Projections for Ontario's Universities and Colleges from 2012 to 2046



Source: MCURES (2024a,d), Statistics Canada (2024b).

Note: This figure presents Ontario college and university actual domestic enrolments from 2012 to 2022 and enrolment projections from 2023 to 2046.



Table 4

Postsecondary Participation Rates of Adults Aged 18 to 24 Years from 2016 to 2021 in Canada, Ontario, Alberta and BC

	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	% Change, 2016–2022
Canada	43	43	44	44	45	46	3
Ontario	46	45	46	45	47	48	2
Alberta	33	33	33	36	38	42	9
BC	41	40	43	42	42	44	3

Source: Statistics Canada (2024b)

Note: This table shows college and university participation rates of adults aged 18 to 24 years from 2016 to 2021 in Canada, Ontario, Alberta and BC.



Table 5

College and University Participation Rates of Adults Aged 18 to 24 years from 2016 to 2021 in Canada, Ontario, Alberta and BC

	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	% Change, 2016–2022
Canada							
University	28	29	29	30	32	33	5
College	15	14	15	14	13	13	-2
Ontario							
University	31	31	32	32	35	36	5
College	15	14	14	13	12	12	-3
Alberta							
University	25	26	24	28	30	34	9
College	8	7	9	8	8	8	0
BC							
University	29	28	30	31	32	35	6
College	12	12	13	11	10	9	-3

Source: Statistics Canada (2024b)

Note: This table shows college and university participation rates of adults aged 18 to 24 years from 2016 to 2021 in Canada, Ontario, Alberta and BC.



Table 6

Annual Percentage of Domestic Student Enrolments by Gender at Colleges and Universities from 2017 to 2022 in Ontario, Alberta and BC from 2017 to 2022

	2017-18	2018-19	2019-20	2020-21	2021-22
Ontario					
University					
Man	43	43	42	42	41
Woman	56	56	57	57	57
Unknown	< 0.5	< 1	1.2	1.5	1.7
College					
Man	45	45	45	42	42
Woman	55	55	55	57	58
Unknown	< 0.5	< 0.5	< 0.5	< 0.5	< 1
Alberta					
University					
Man	40	40	40	39	39
Woman	60	60	60	60	60
Unknown	< 0.1	< 0.1	< 0.1	< 0.5	< 0.5
College					
Man	40	40	40	39	39
Woman	60	60	59	61	61
Unknown	< 0.1	< 0.1	< 0.1	< 0.1	< 0.5
BC					
University					



Man	42	42	41	41	41
Woman	58	58	58	59	59
Unknown	< 0.1	< 0.1	< 0.5	< 0.5	< 0.5
College					
Man	44	44	44	43	44
Woman	55	56	55	56	55
Unknown	< 0.5	< 0.5	< 1	< 0.1	1

Source: Statistics Canada (2024a)

Note: This table shows the proportion of annual domestic student enrolment for different genders in Ontario, Alberta and BC from 2017 to 2022.



Table 7

New Domestic Enrolments for Indigenous and Non-Indigenous Students from 2015 to 2021 in Canada, Ontario, Alberta and BC

	2015	2016	2017	2018	2019	2020	2021	% Change 2015-2021
Canada	381,420	375,260	375,850	370,210	365,460	355,810	361,000	-5
Indigenous	17,200	17,560	17,330	17,270	17,210	15,590	16,440	-4
Non-Indigenous	364,220	357,700	358,520	352,940	348,250	340,220	344,560	-5
Ontario	196,580	189,450	191,460	186,820	182,620	174,190	175,800	-11
Indigenous	6,640	6,370	6,530	6,100	6,160	5,180	5,500	-17
Non-Indigenous	189,940	183,080	184,930	180,720	176,460	169,010	170,300	-10
Alberta	37,010	39,730	39,690	38,970	39,910	39,590	41,640	13
Indigenous	2,060	2,360	2,470	2,540	2,480	2,720	2,770	34
Non-Indigenous	34,950	37,370	37,220	36,430	37,430	36,870	38,870	11
BC	35,740	35,600	35,210	35,890	35,510	35,370	36,200	1
Indigenous	2,210	2,300	2,200	2,260	2,320	2,040	2,280	3

Non-Indigenous	33,530	33,300	33,010	33,630	33,190	33,330	33,920	1
----------------	--------	--------	--------	--------	--------	--------	--------	---

Source: Statistics Canada (2024d)

Note: This table shows the number of and percentage increase in new annual domestic enrolments for Indigenous and non-Indigenous students in Canada, Ontario, Alberta and BC from 2015 to 2021