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# **Demographic Shifts in Ontario and the Greater Toronto Area and the Implications for Post-secondary Education**

**A Presentation to**

***Annual Strategic Planning Retreat***  
**School of Administrative Studies, York University**

**By**

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**Toronto, Ontario**  
**September 8, 2009**

# Demographic Analysis

## Overview

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- Study of human populations
- Key factors of analysis:
  - » Sex
  - » Ethnicity/race
  - » Marital status and family structure
  - » Births and deaths
  - » Migration
  - » **AGE**

# Demographic Analysis

## Overview

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To become an amateur demographer  
you must understand:

- Two assumptions
- Template of “cohorts”

# **Demographic Analysis**

## **Assumptions**

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### ***Assumption #1***

***Every year you get a year older***

# **Demographic Analysis**

## **Assumptions**

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### ***Assumption #2***

***You tend to act your age***

***or***

***Someday you will be like your  
parents***

# Demographic Analysis

## Assumptions

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- *Acting your age:*

- » “Two-thirds of everything” (David K. Foot, *Boom, Bust & Echo 2000*)
- » Life cycle analysis of **economic behaviour**: how you spend your time and money
- » **Strategic and long-term** (10-20 years)
- » **Baseline analysis** (don't forget the survey research, economic forecasting, policy analysis, etc.)

# Demographic Analysis

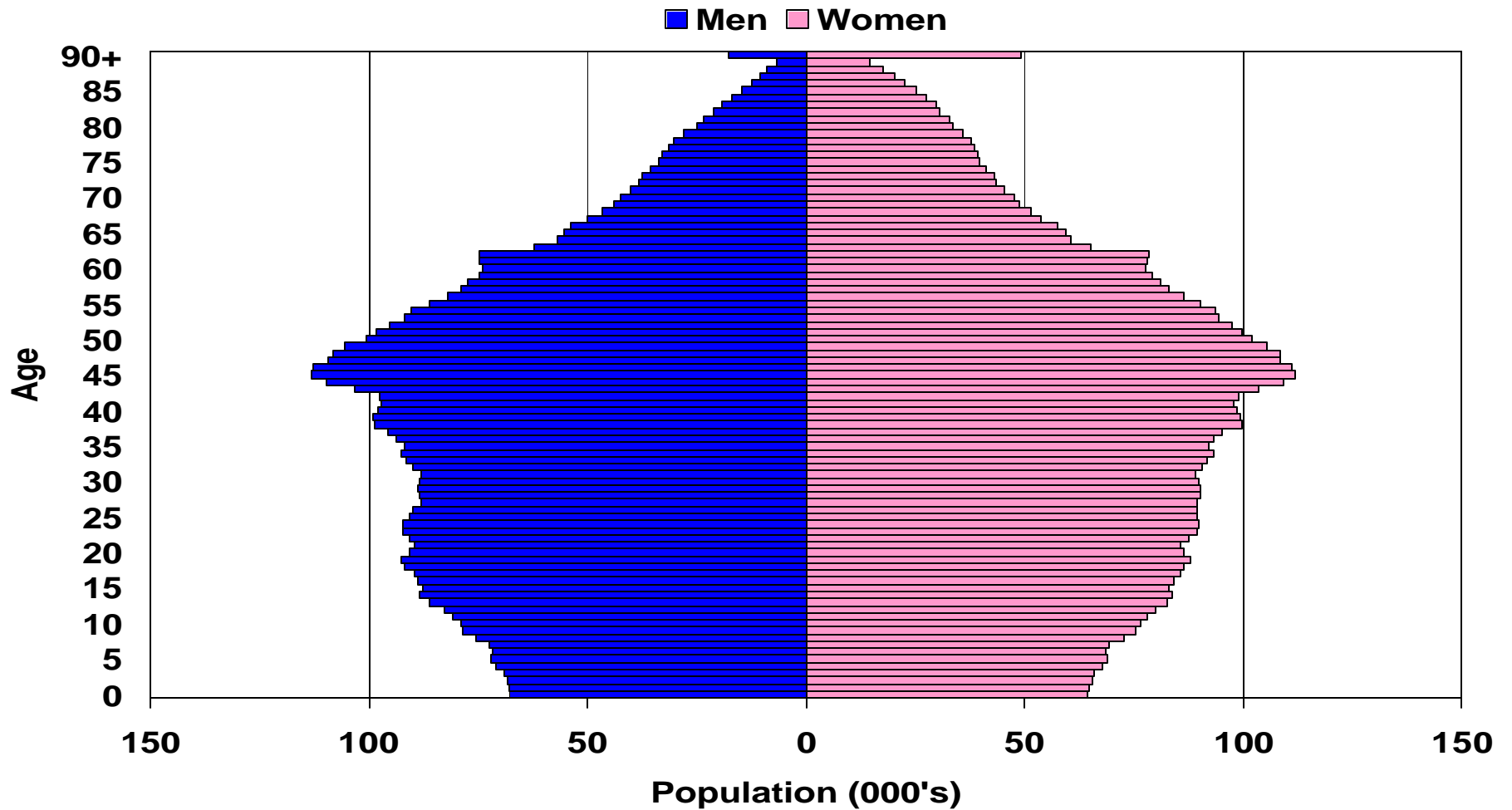
## *Cohorts*

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- **Boom:** 1947-1966
  - » 43-62 in 2009
  - » 29 percent of Ontario's population
- **Bust:** 1967-1979
  - » 30-42 in 2009
  - » 19 percent of Ontario's population
- **Echo:** 1980-1995
  - » 14-29 in 2009
  - » 22 percent of Ontario's population

# Ontario

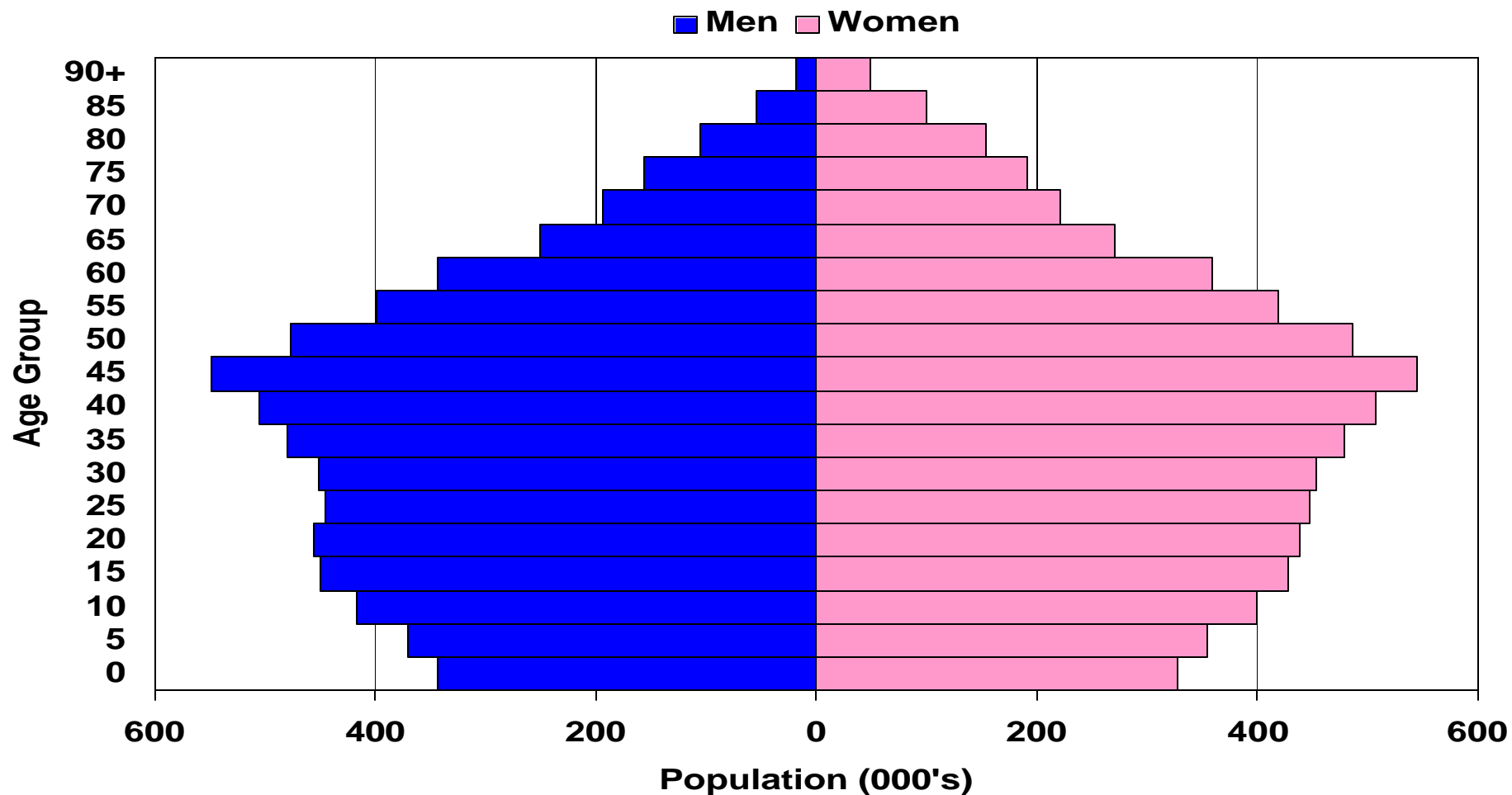
## Single-year Population Pyramid, 2009 (thousands)



Source: Statistics Canada and R.A.L. Consulting Limited

# Ontario

## Five-year Population Pyramid, 2009 (thousands)



Source: Statistics Canada and R.A.L. Consulting Limited

# Demographic Analysis

## Today's Presentation

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- Aging and ethnic/racial diversification of Ontario's population
- Projected population change in Ontario, 2009 to 2019:
  - » Regions
  - » Age groups
- Opportunities and challenges facing Ontario's universities in sustaining enrolment growth over the next ten years

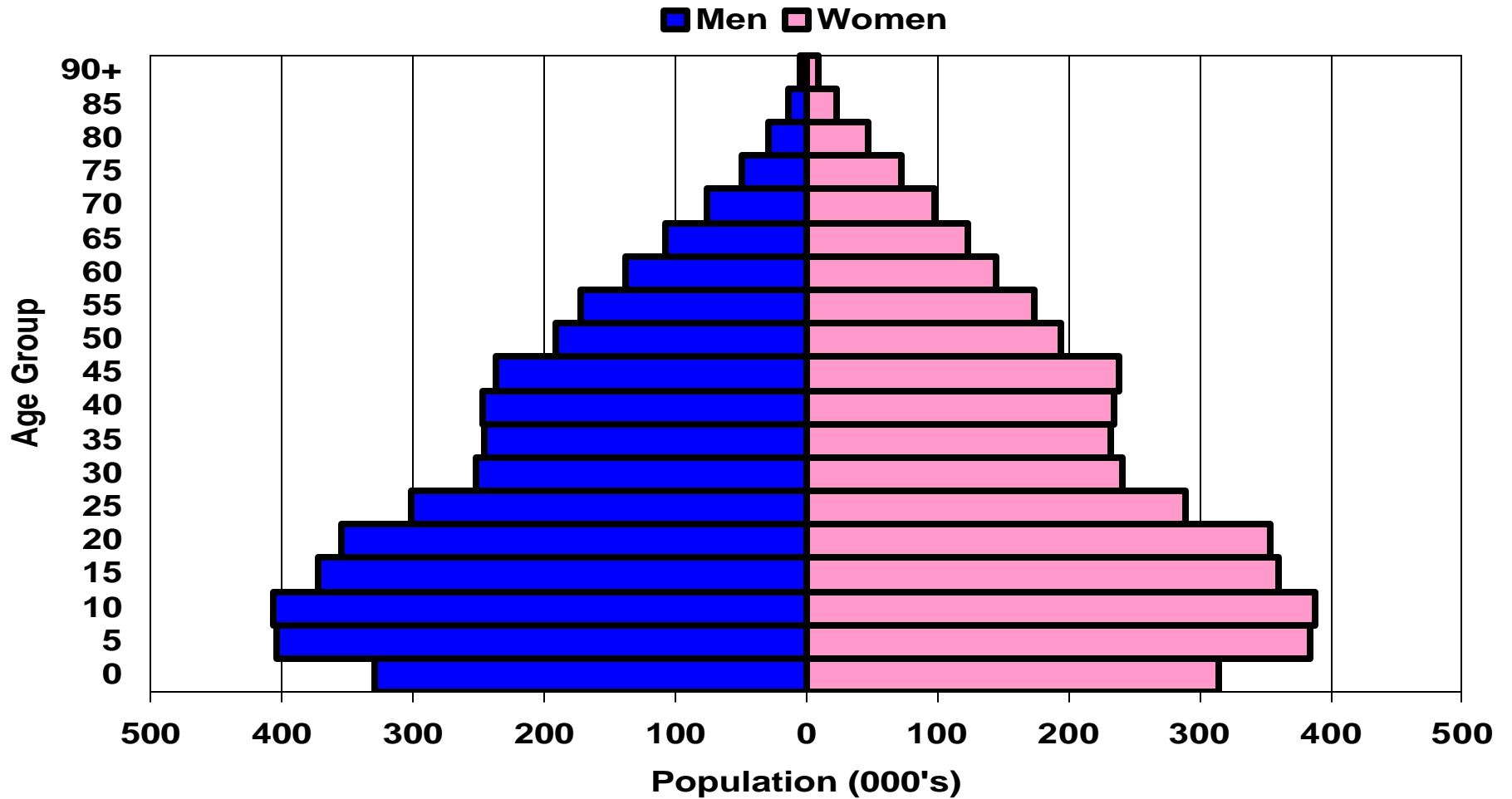
# **Demographic Trends - Ontario**

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## ***Population Aging***

# Ontario

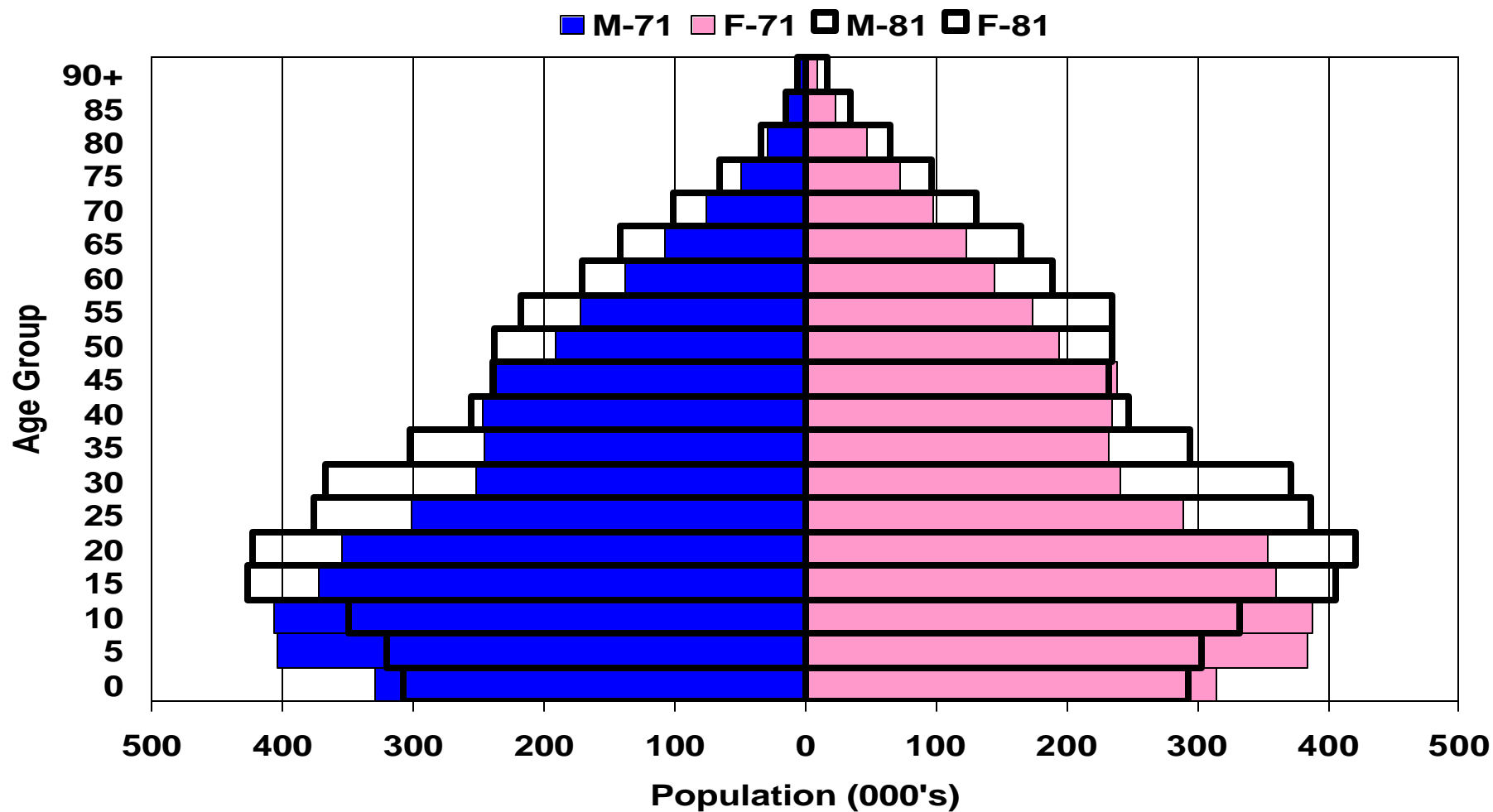
## Population Pyramid, 1971



Source: Statistics Canada and R.A.L. Consulting Limited

# Ontario

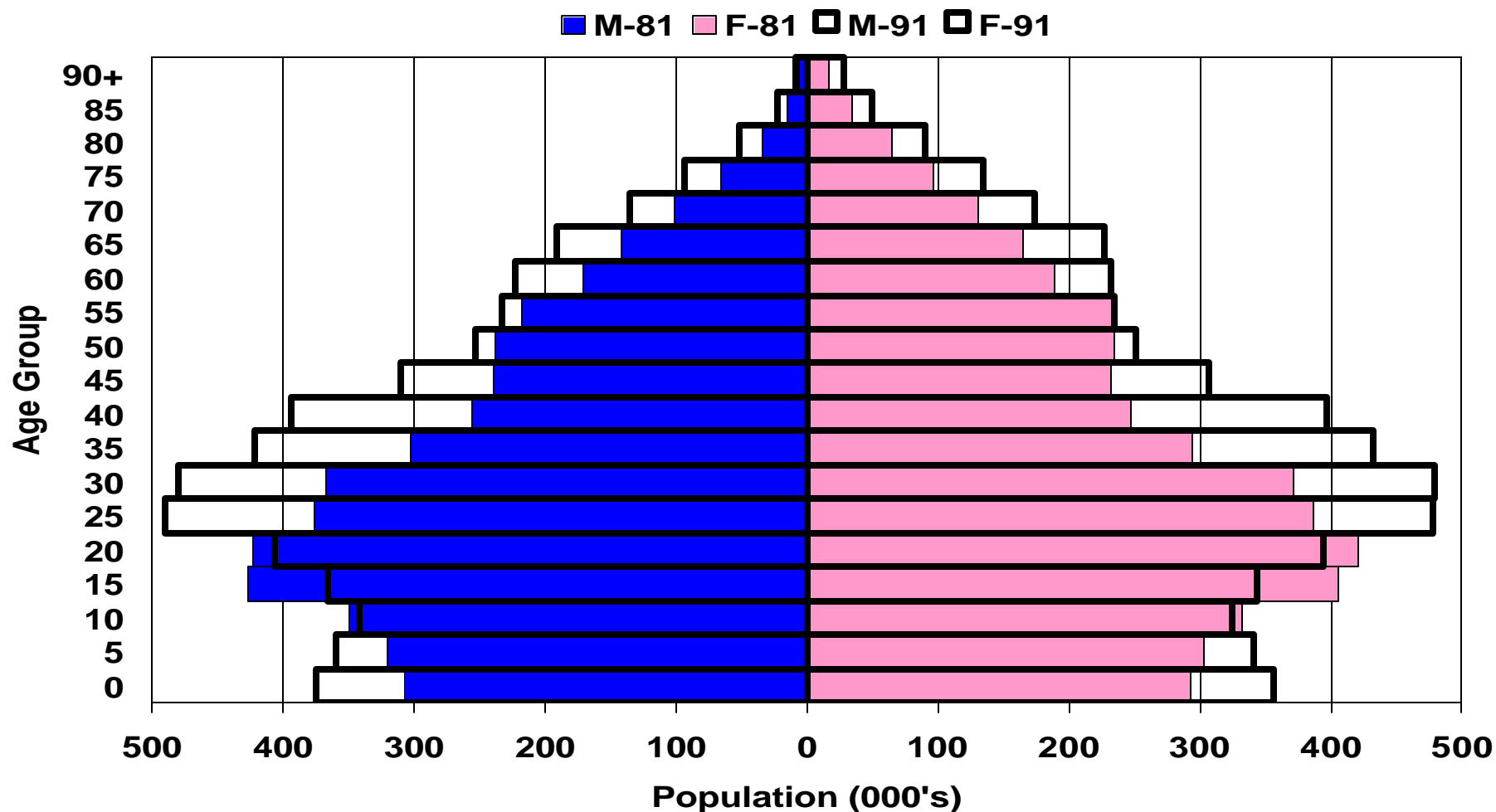
## Population Pyramid, 1971 (colour) versus 1981 (outline)



Source: Statistics Canada and R.A.L. Consulting Limited

# Ontario

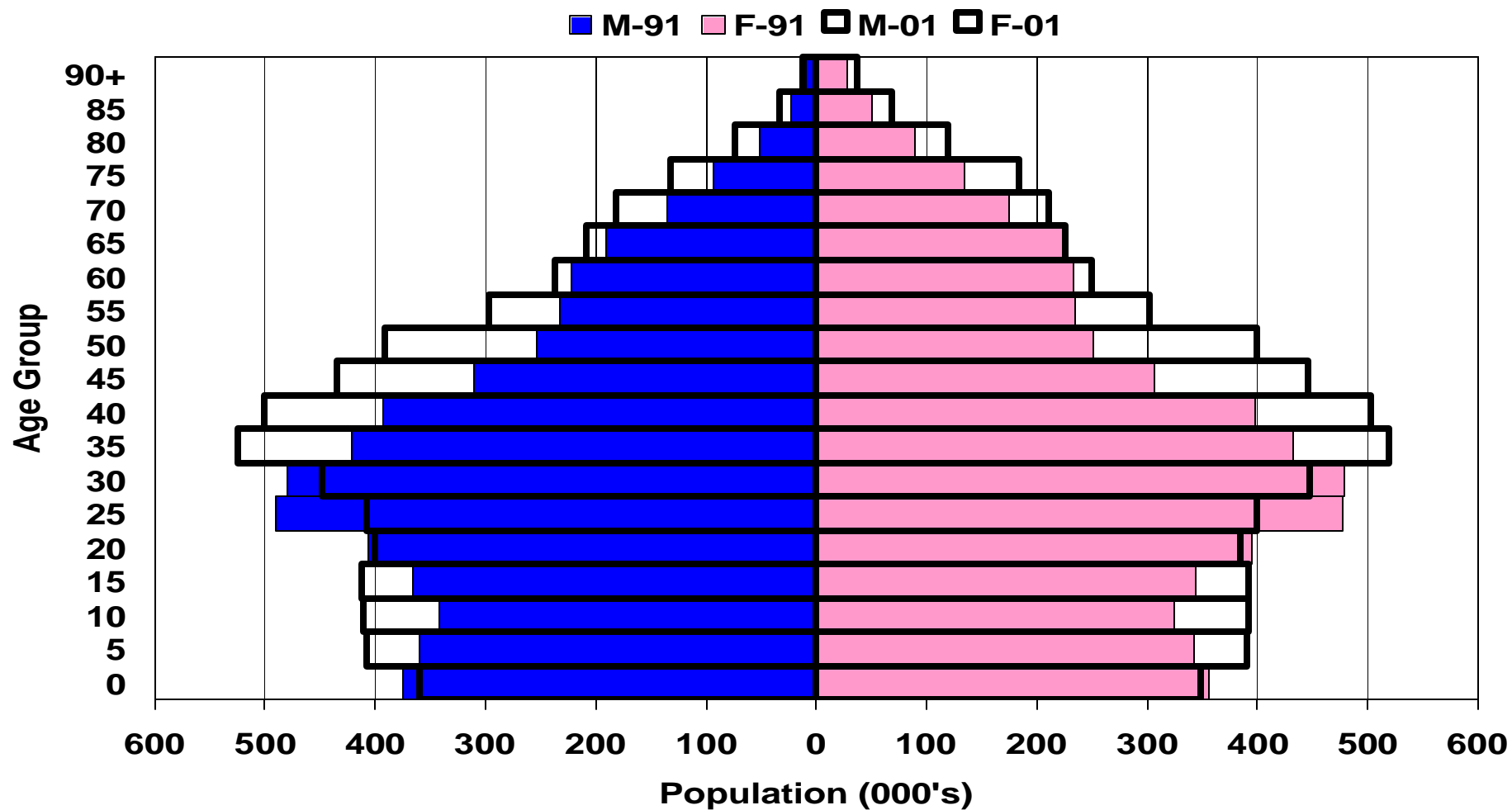
## Population Pyramid, 1981 (colour) versus 1991 (outline)



Source: Statistics Canada and R.A.L. Consulting Limited

# Ontario

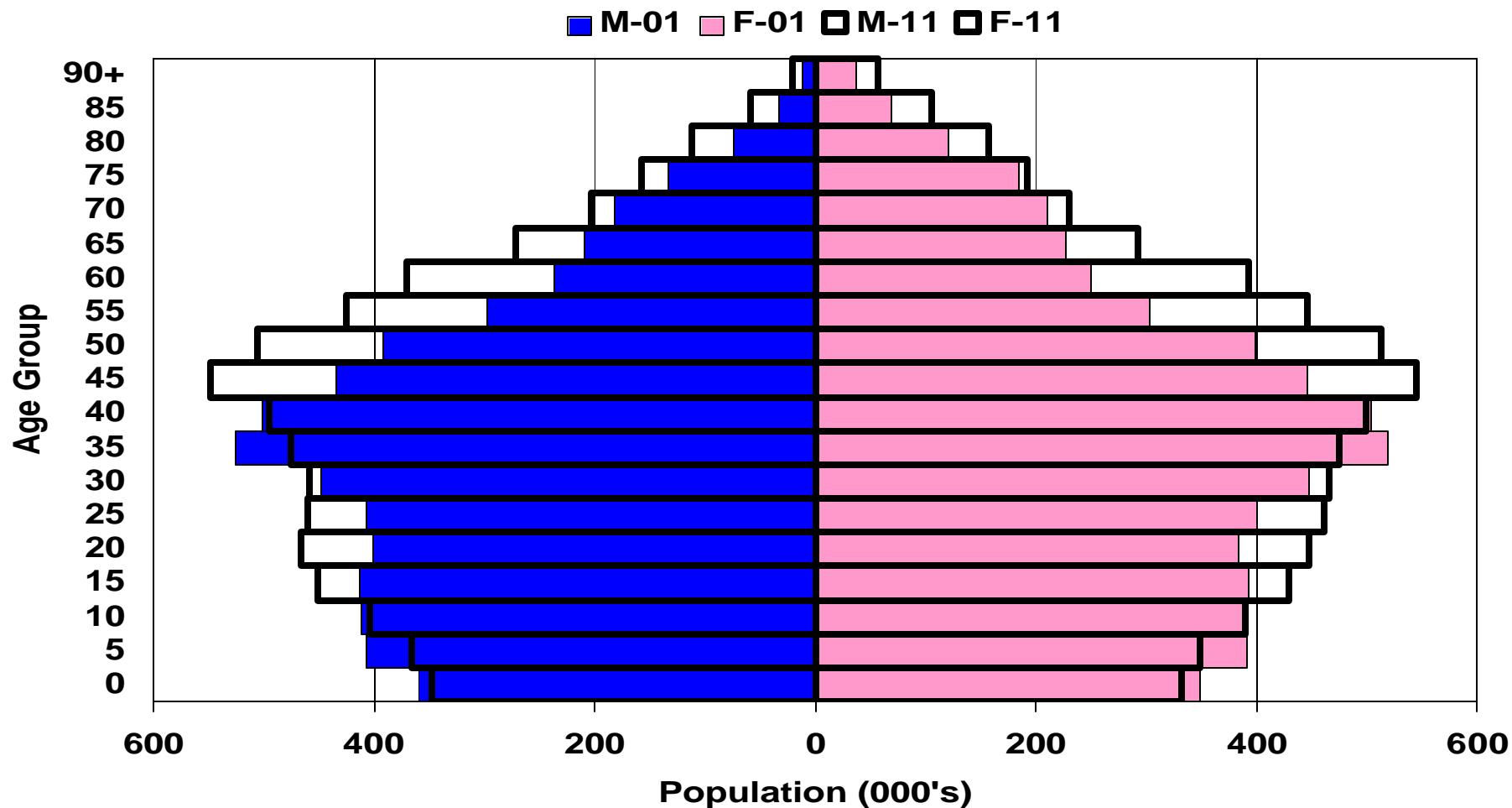
## Population Pyramid, 1991 (colour) versus 2001 (outline)



Source: Statistics Canada and R.A.L. Consulting Limited

# Ontario

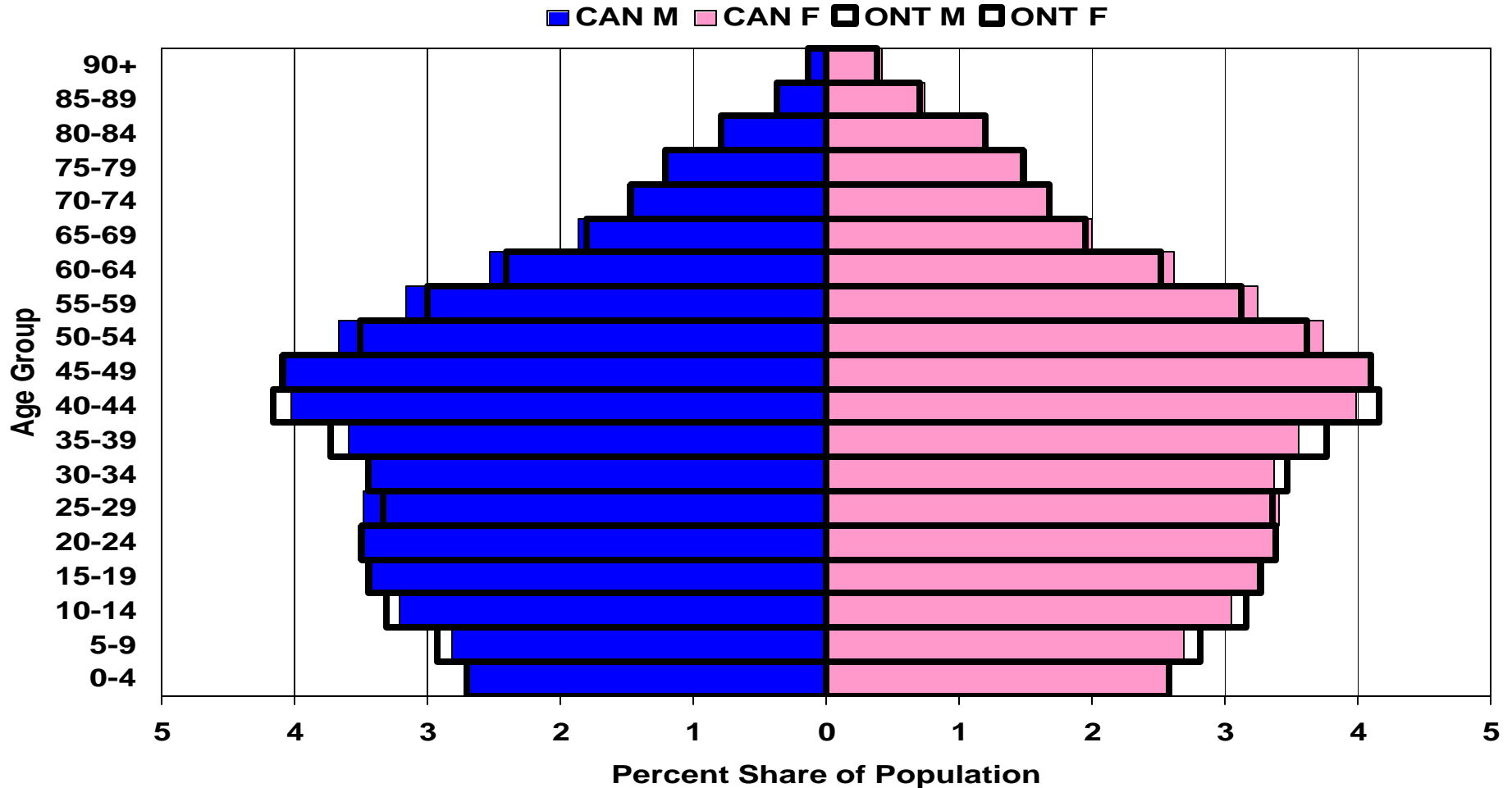
## Population Pyramid, 2001 (colour) versus 2011 (outline)



Source: Statistics Canada and R.A.L. Consulting Limited

# Population Pyramid

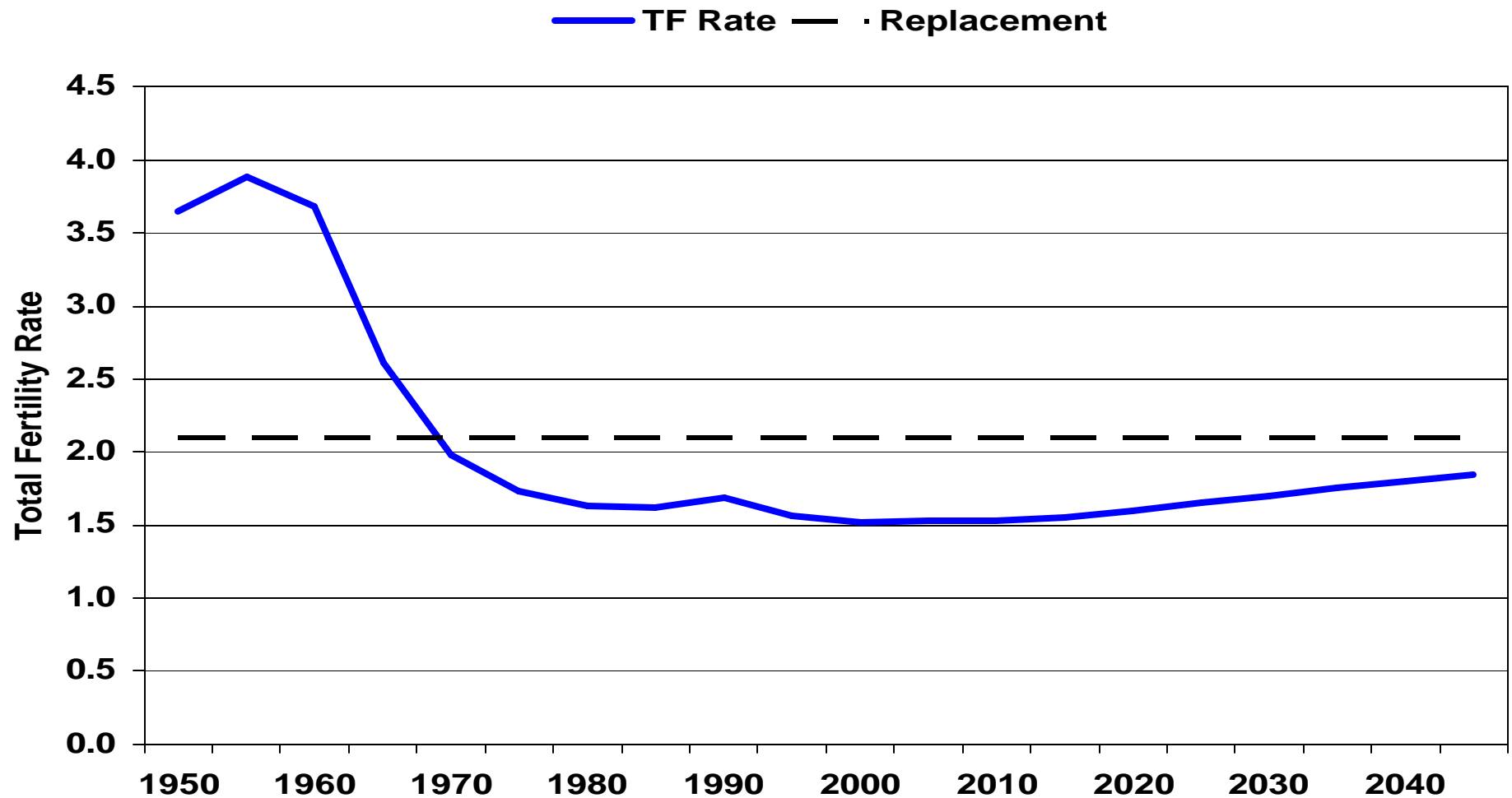
## Ontario versus Canada, 2007



Source: Statistics Canada and R.A.L. Consulting Limited

# Total Fertility Rate

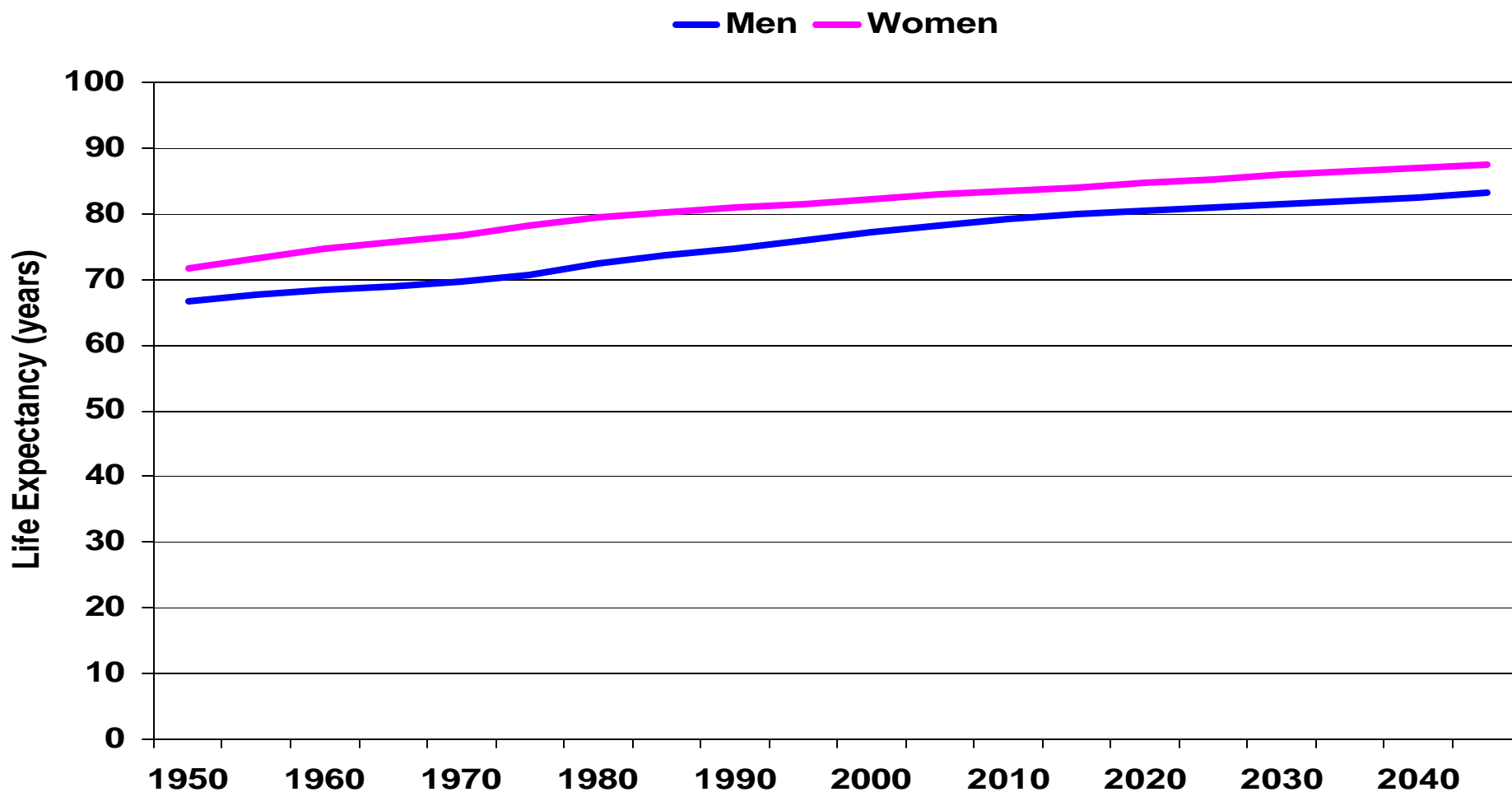
Canada, 1950 to 2050 (historical and projected)



Source: United Nations Population Division

# Life Expectancy at Birth by Sex

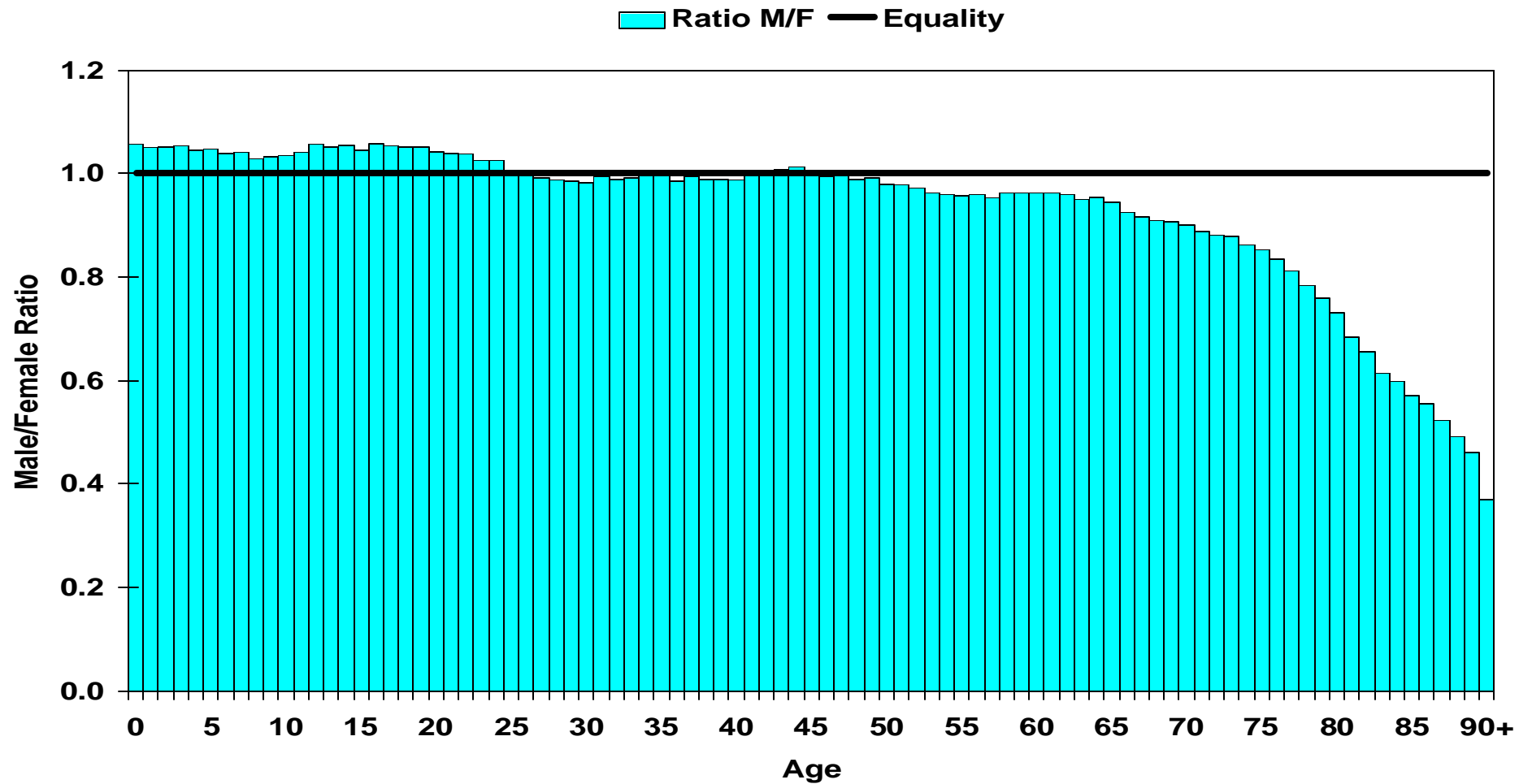
## Canada, 1950 to 2050 (historical and projected)



Source: United Nations Population Division

# Male:Female Ratio by Age

Ontario, 2007



Source: Statistics Canada and R.A.L. Consulting Limited

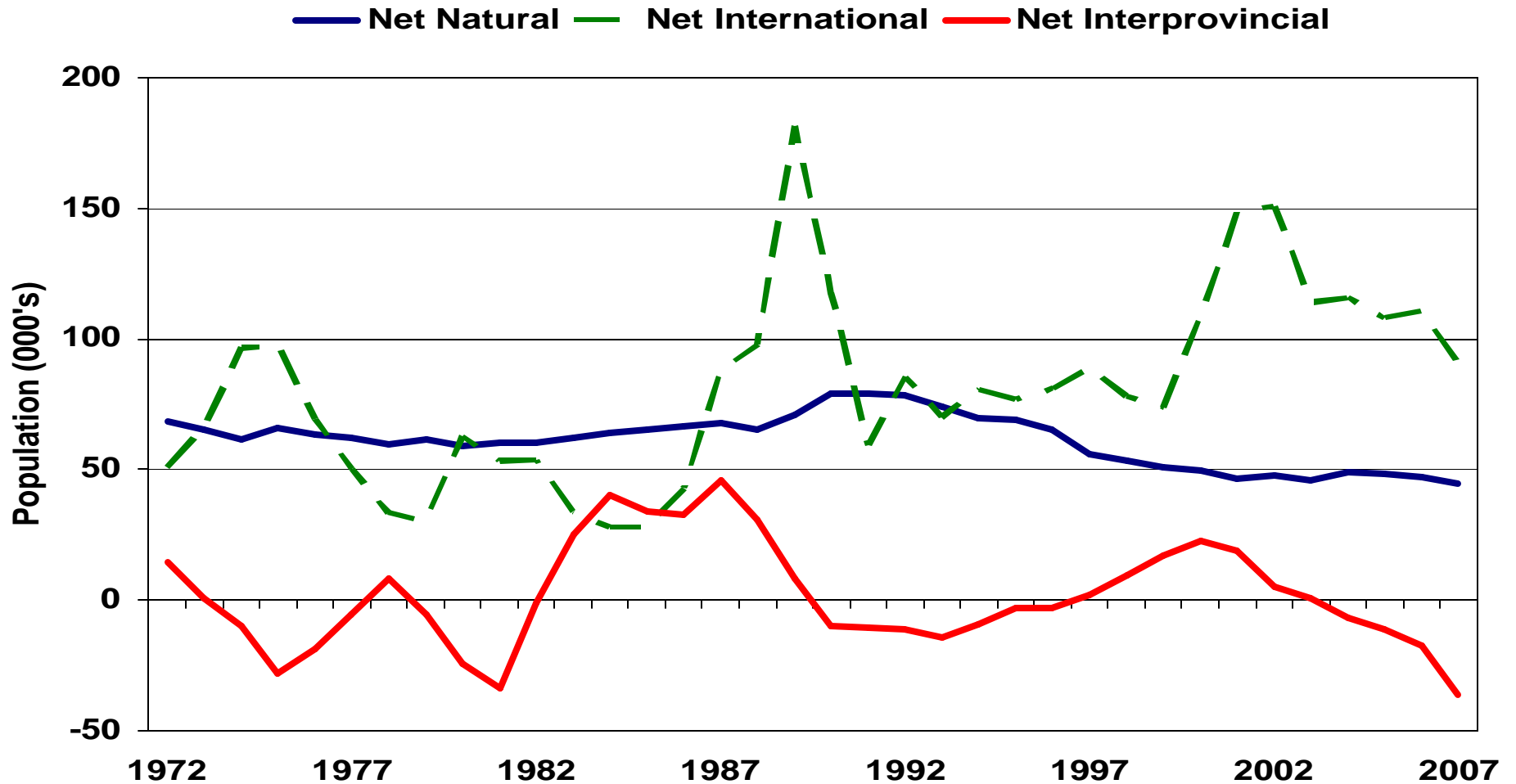
# **Demographic Trends - Ontario**

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## ***Population Change and Diversity***

# Ontario

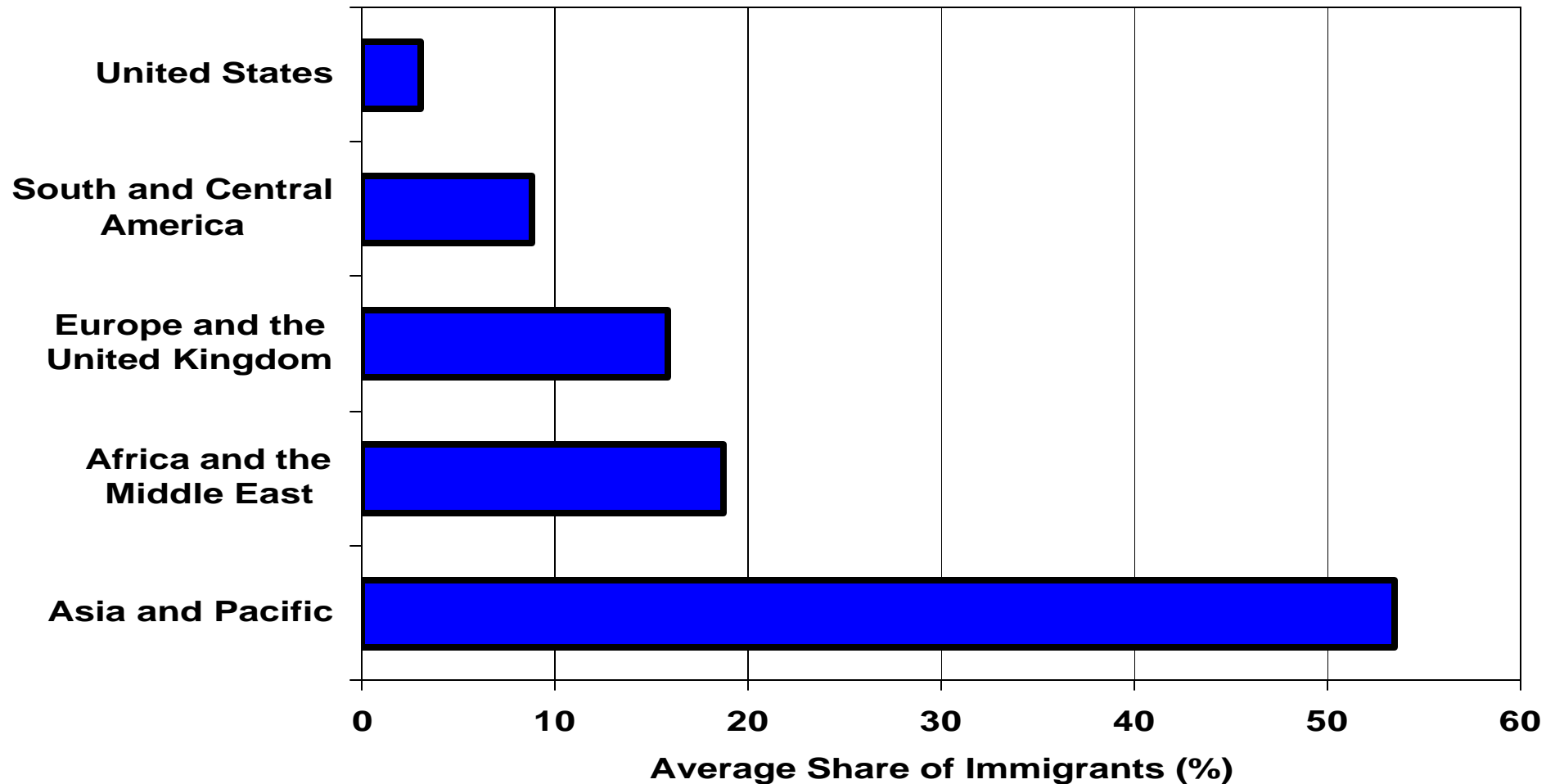
## Population Change by Source, 1972-2007



Source: Statistics Canada and R.A.L. Consulting Limited

# Ontario

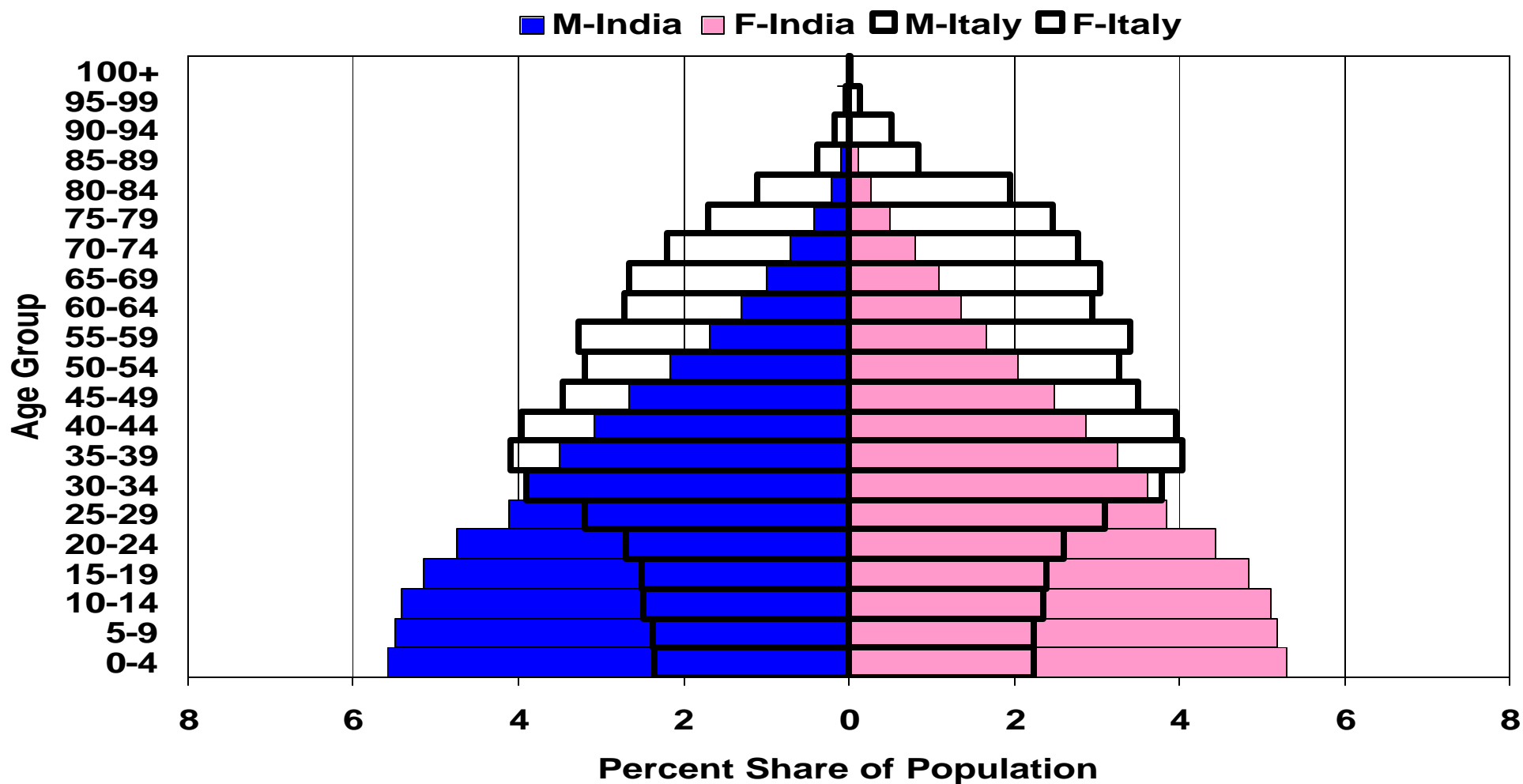
## Average Share of Immigrants by Source Region, 1998-2007



Source: Citizenship and Immigration Canada and R.A.L. Consulting Limited

# Population Pyramid

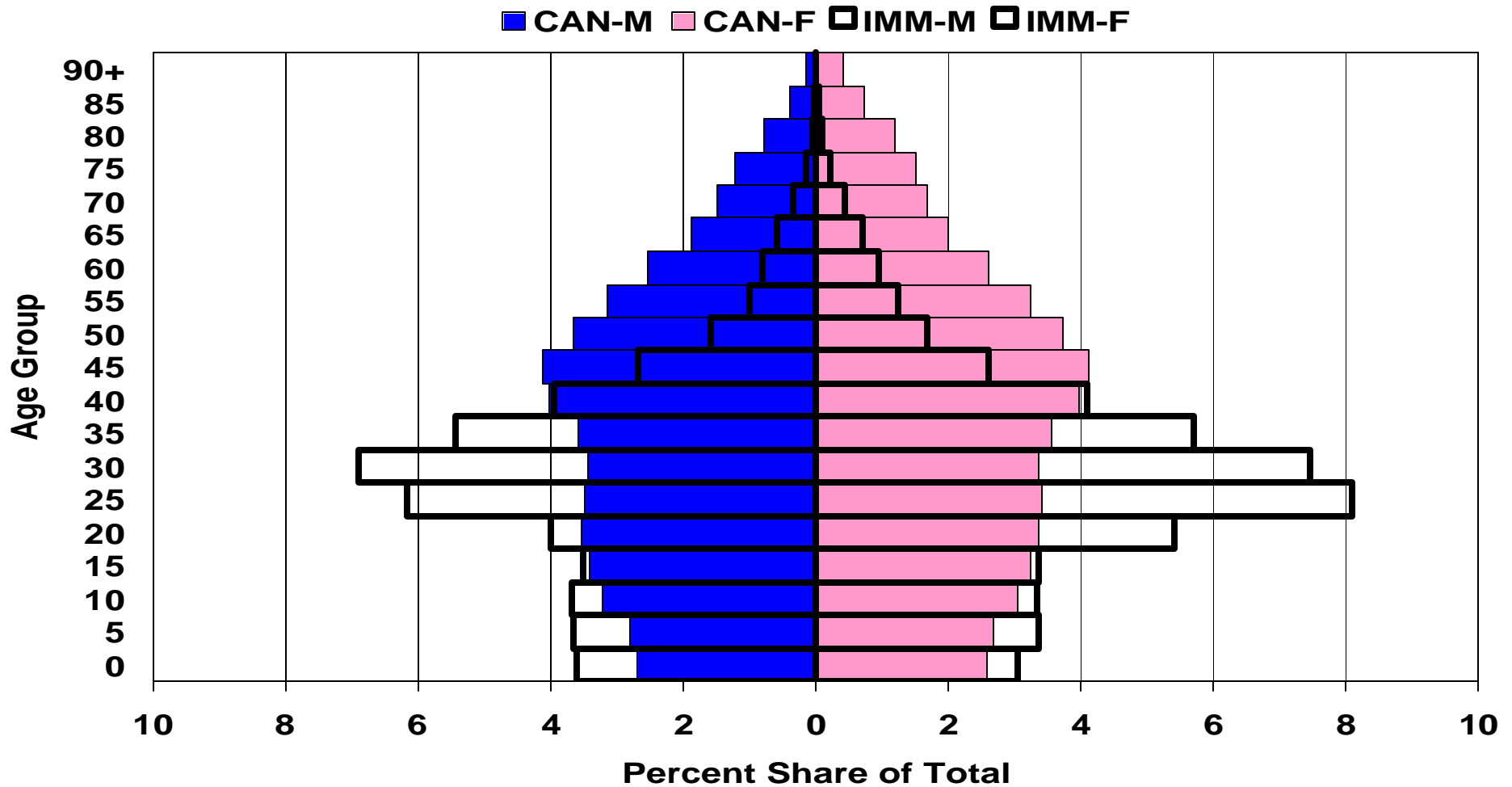
## Italy (outline) versus India (colour), 2005



Source: United Nations and R.A.L. Consulting Limited

# Demographic Footprint: Population

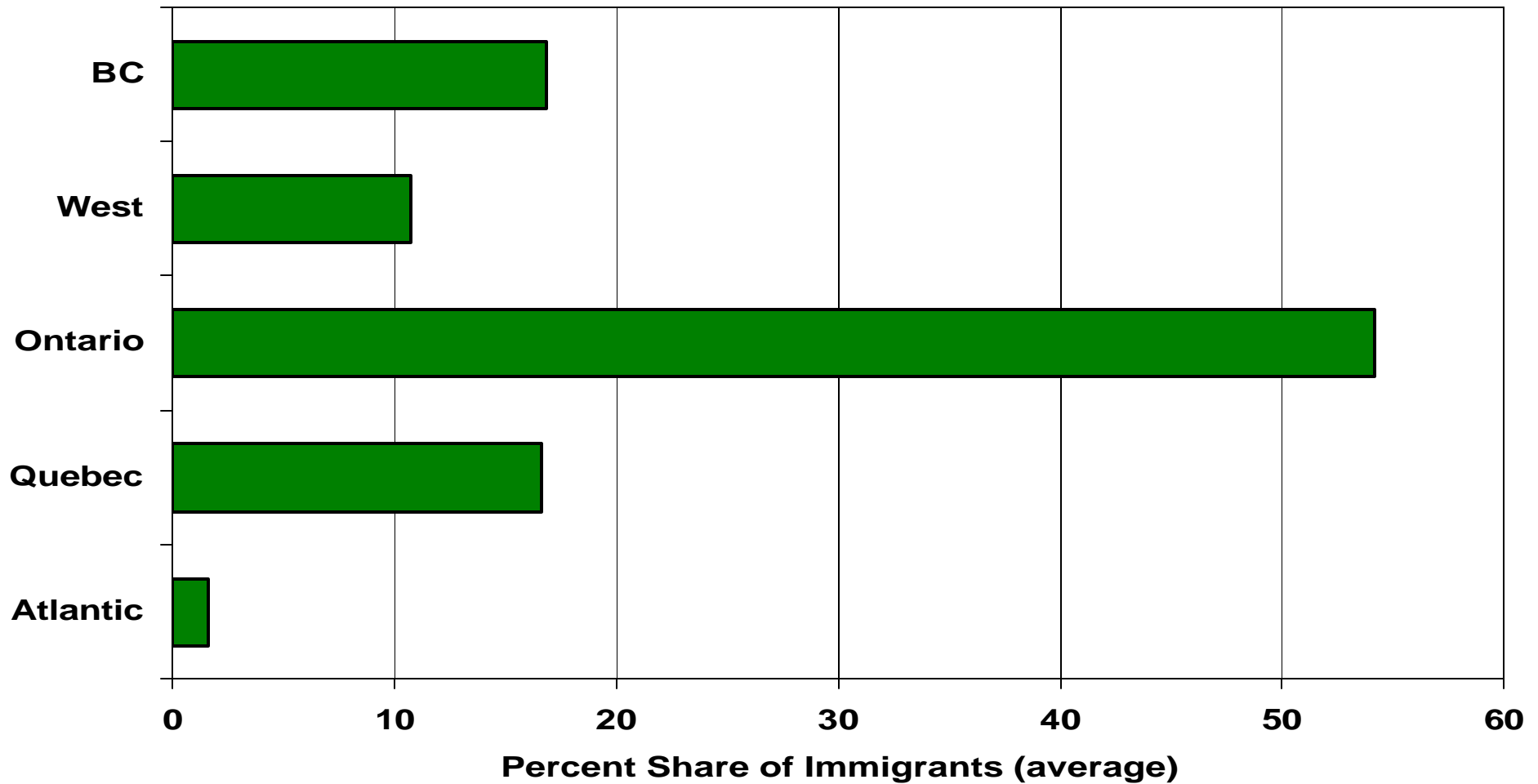
Immigrants to Canada (outline) versus Canada (colour), 2007



Source: Statistics Canada and R.A.L. Consulting Limited

# Canada

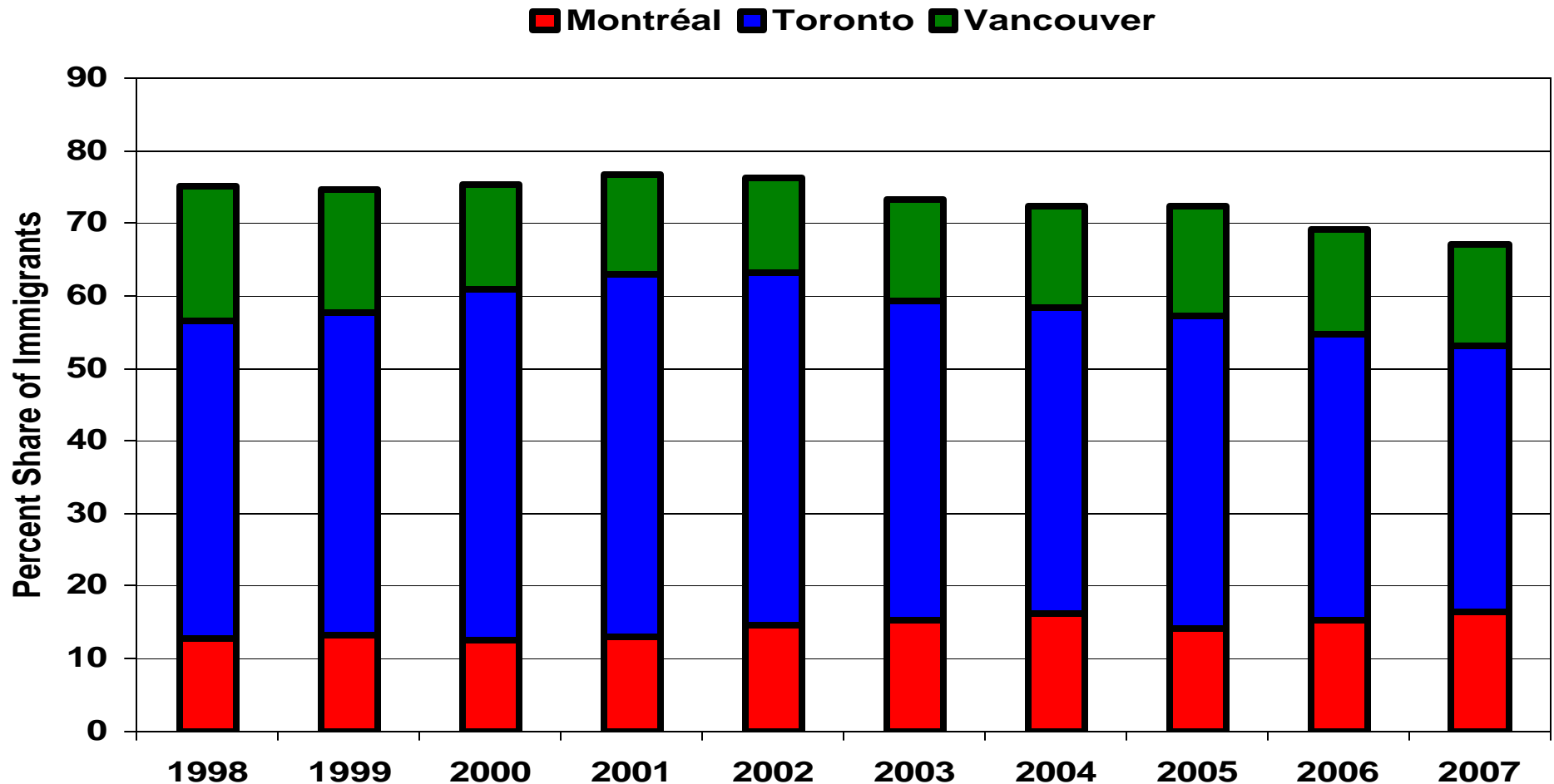
## Average Share of Immigrants by Destination, 1998-2007



Source: Citizenship and Immigration Canada and R.A.L. Consulting Limited

# Canada

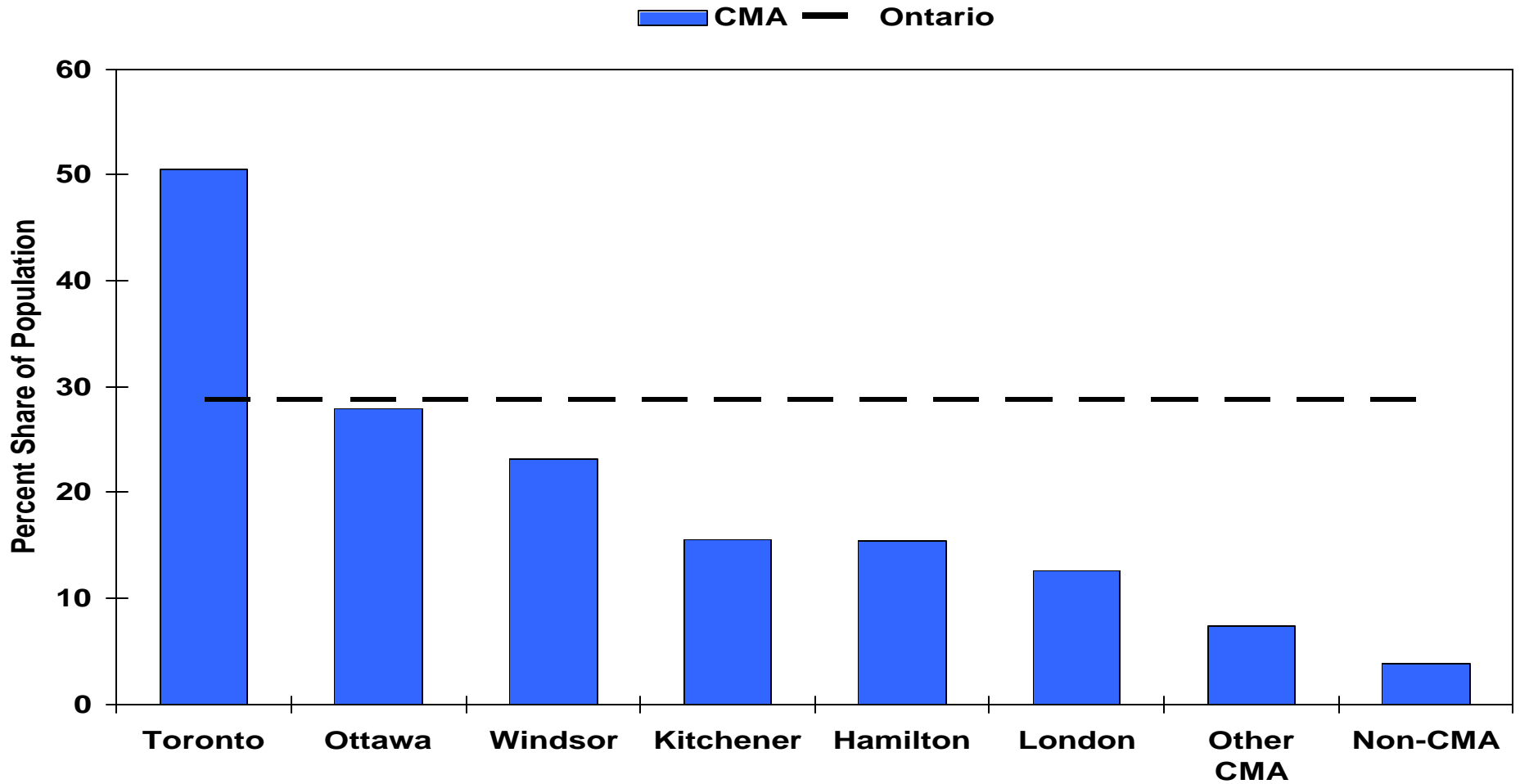
## Average Share of Immigrants by Census Metropolitan Area, 1998-2007



Source: Citizenship and Immigration Canada and R.A.L. Consulting Limited

# Ontario

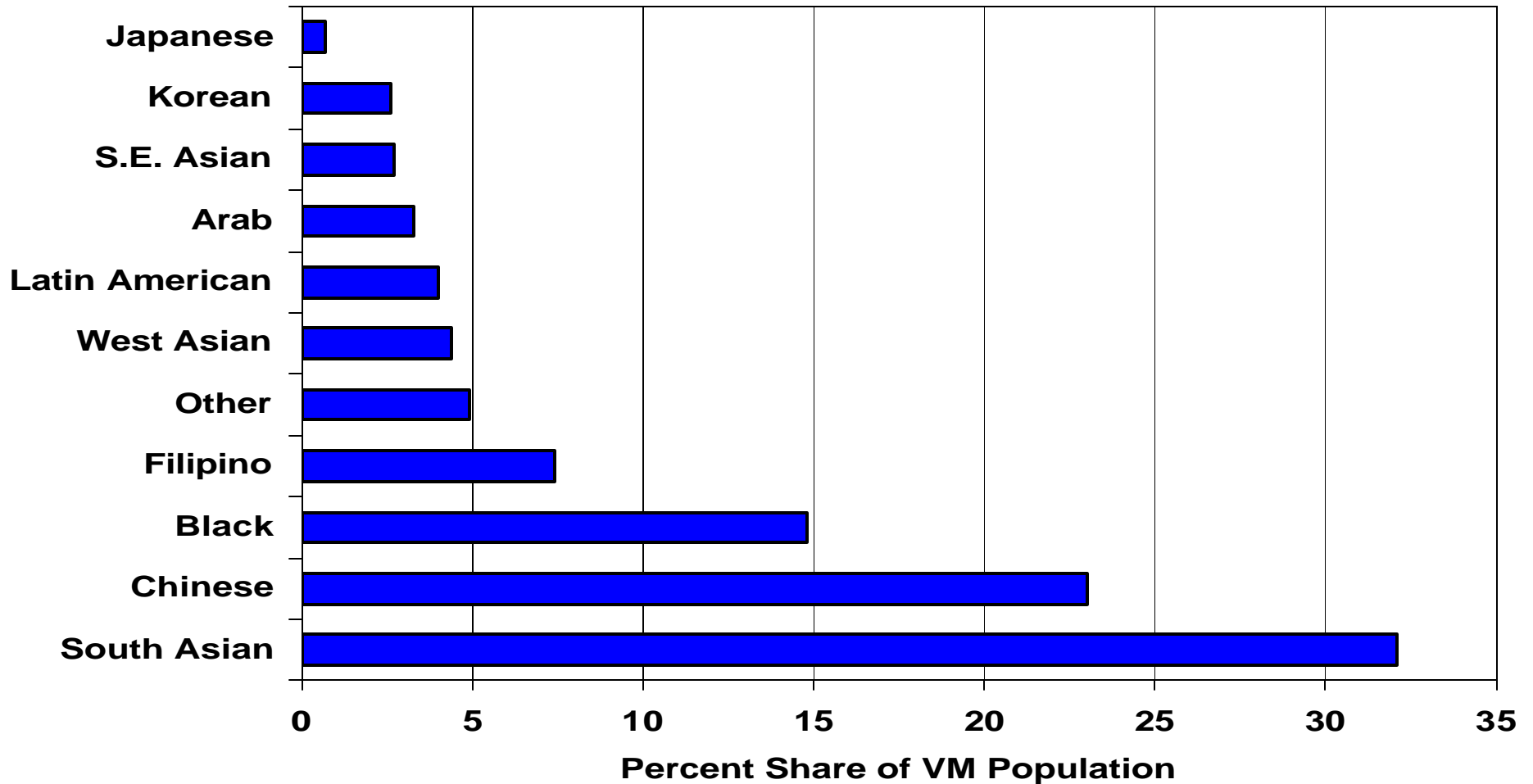
## Visible Minority Population Share by CMA, 2017 (projected)



Source: Statistics Canada and R.A.L. Consulting Limited

# Visible Minority Population

Projected Share by Ethnic/racial Group, Toronto CMA, 2017



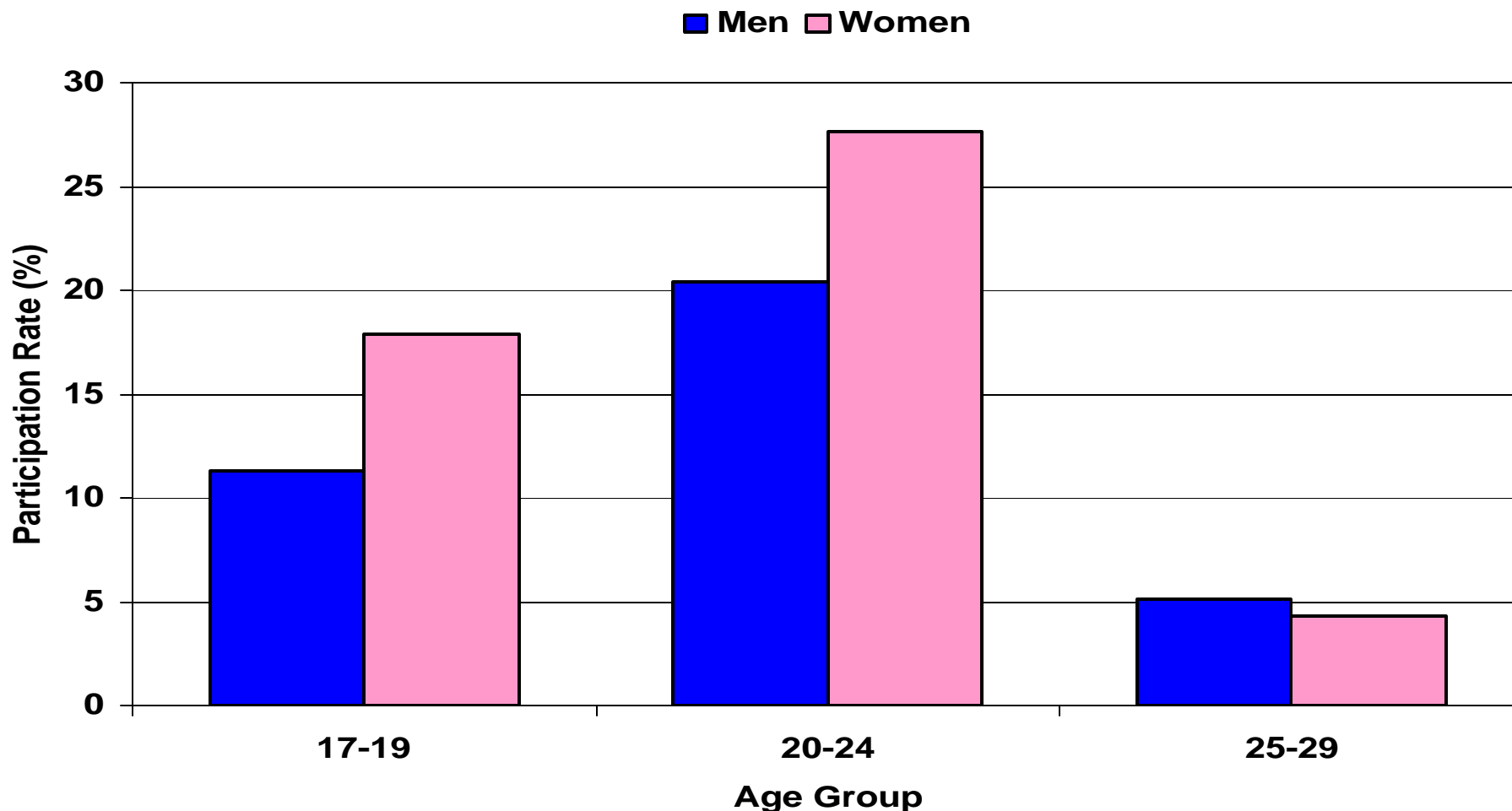
# **Demographic Trends - Ontario**

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## ***Population Change, 2009 to 2019***

# Full-time University Participation Rates

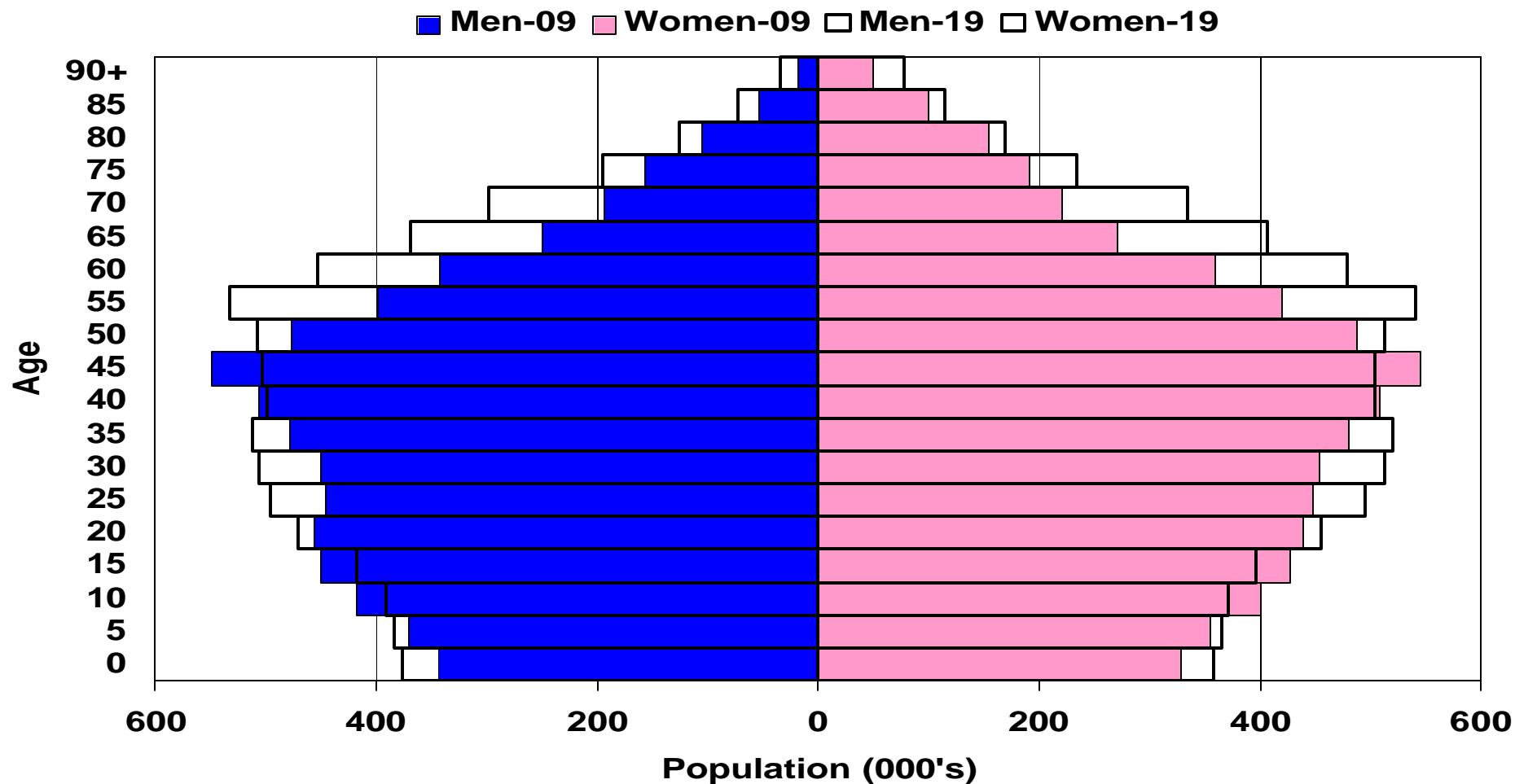
## Ontario, 2003/2004 to 2005/2006 Average (percent)



Source: Statistics Canada, *Postsecondary Enrolment Trends to 2031: Three Scenarios*

# Ontario

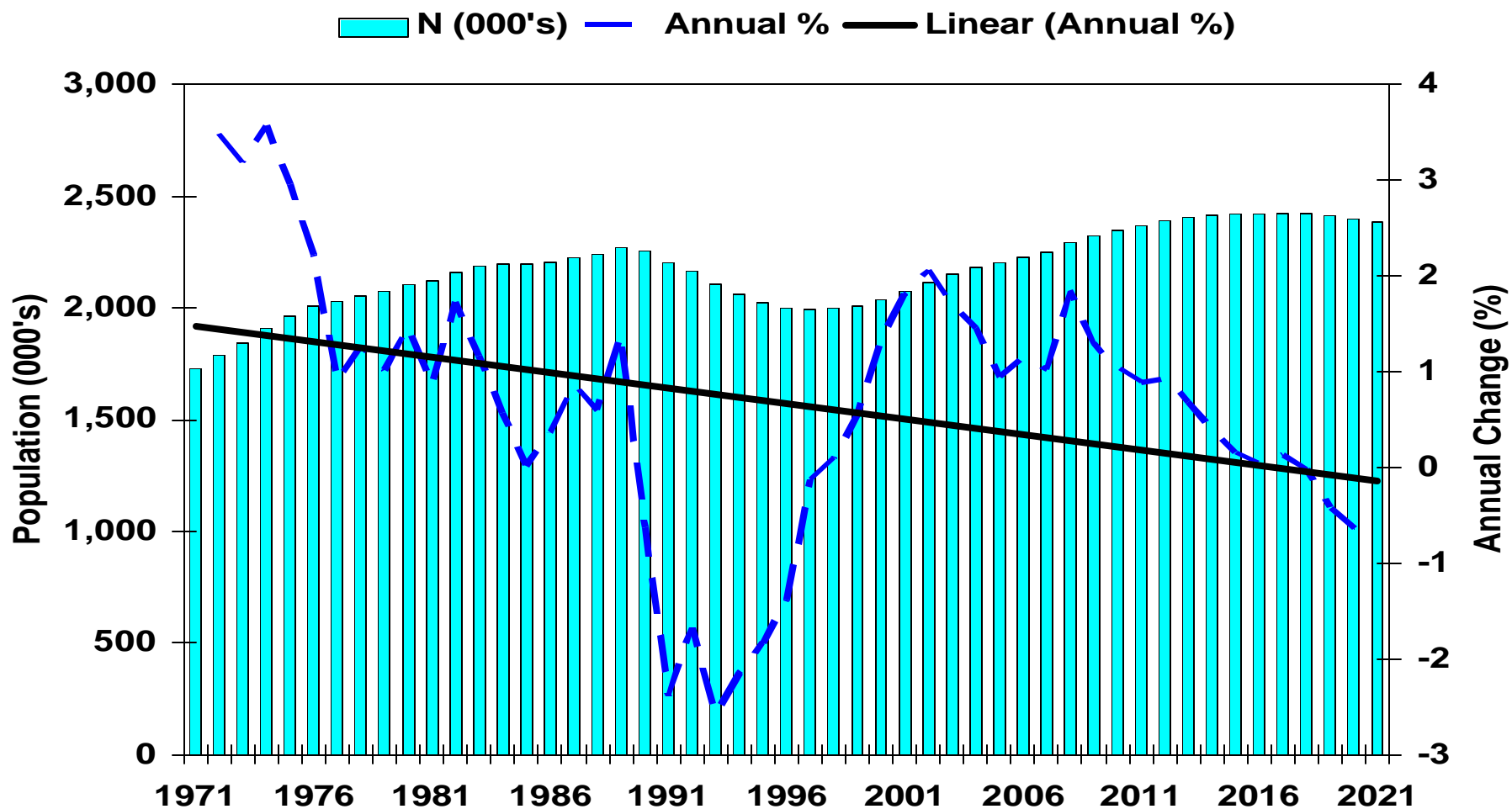
## Population Pyramid, 2009 (colour) versus 2019 (outline)



Source: Statistics Canada and R.A.L. Consulting Limited

# Ontario

## 17 to 29 Age Group, 1971 to 2021



Source: Statistics Canada and R.A.L. Consulting Limited

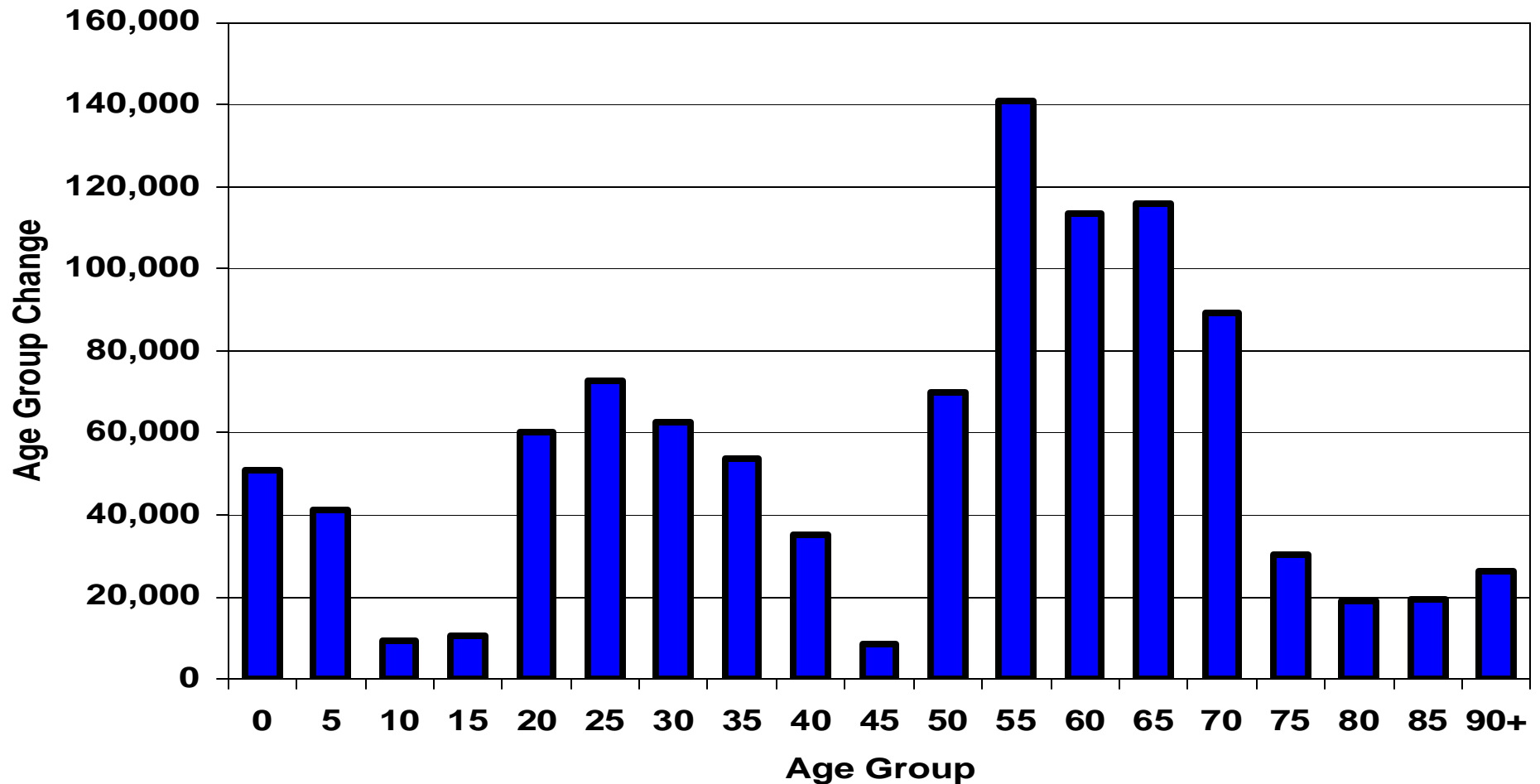
# Opportunity

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☺ The GTA will have the greatest growth among Ontario's regions in the age group (17 to 29) with the highest full-time university participation rate.

# Greater Toronto Area

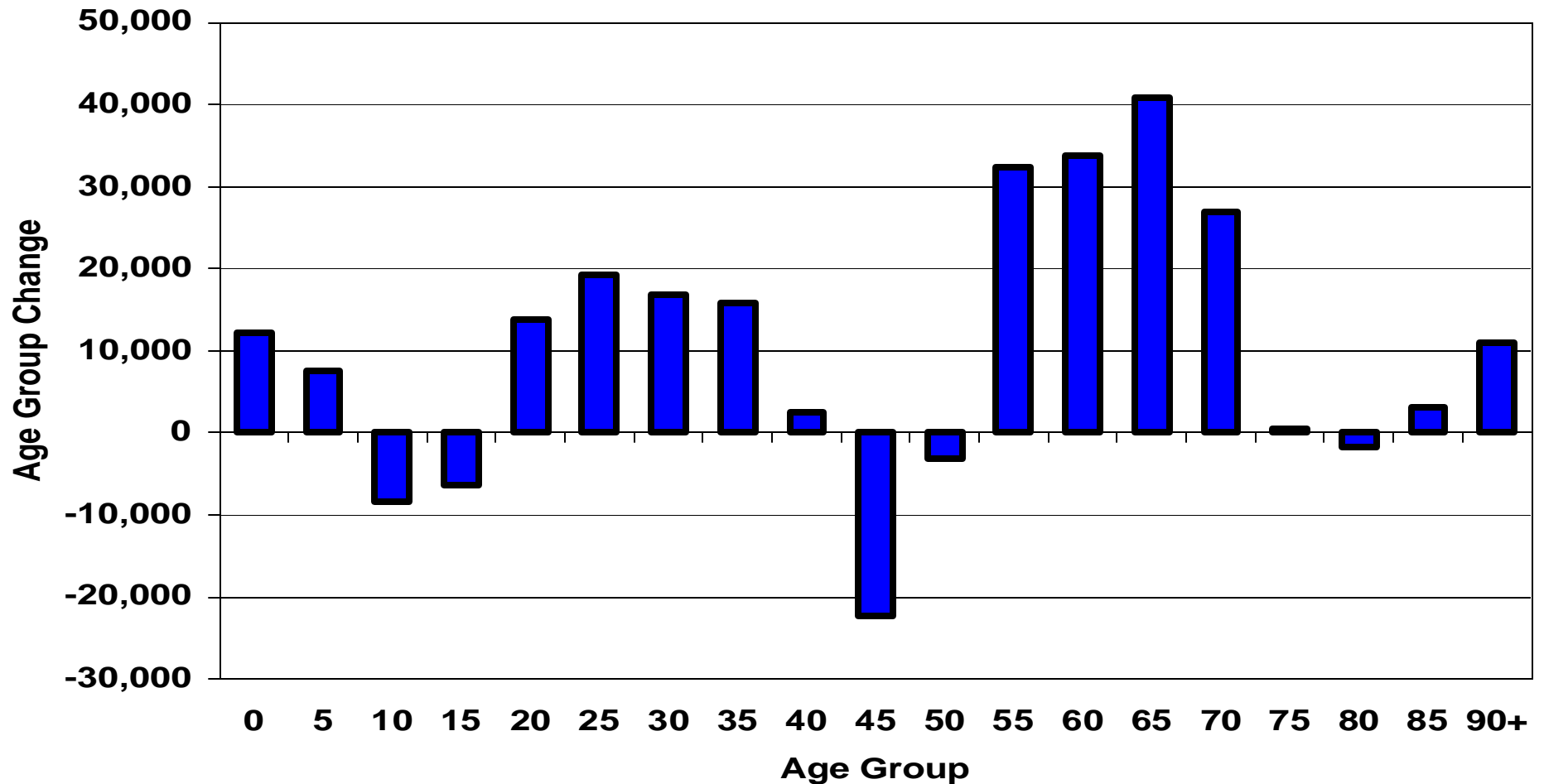
## Population Change by Age Group, 2009 – 2019 (projected)



Source: Ontario Ministry of Finance and R.A.L. Consulting Limited

# City of Toronto

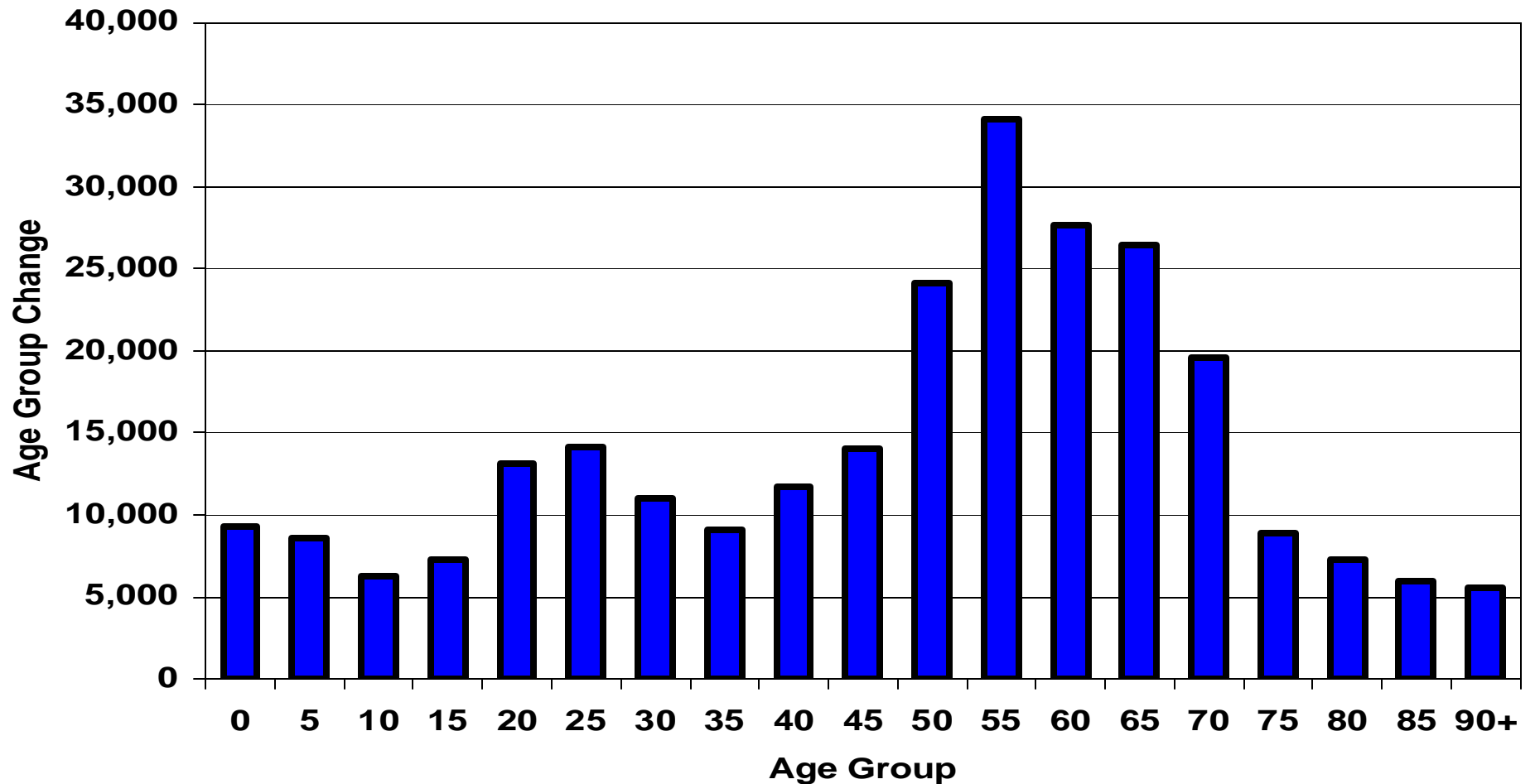
## Population Change by Age Group, 2009 – 2019 (projected)



Source: Ontario Ministry of Finance and R.A.L. Consulting Limited

# York Region

## Population Change by Age Group, 2009 – 2019 (projected)



Source: Ontario Ministry of Finance and R.A.L. Consulting Limited

# Ontario

## Population Change by Region, 2009 – 2019 (projected)

Population Change (%), 2009-2019				
Region	15-19	20-24	25-29	30-34
<b>Ontario</b>	<b>-7.1</b>	<b>6.0</b>	<b>13.4</b>	<b>14.9</b>
Southwest	-15.7	-2.6	6.0	12.8
Central	-12.8	1.6	14.1	20.0
<b>Greater Toronto Area</b>	<b>2.6</b>	<b>14.5</b>	<b>16.3</b>	<b>13.0</b>
East	-14.4	0.0	12.5	17.0
Northeast	-26.2	-13.1	1.4	16.8
Northwest	-22.9	-10.4	4.2	11.7

Population Change (%), 2009-2019				
Region	15-19	20-24	25-29	30-34
Toronto	-4.1	7.8	8.6	6.9
Durham	-9.6	9.3	28.0	26.6
Halton	9.4	21.9	28.6	22.7
Peel	11.3	24.1	21.9	17.0
York	10.1	18.7	23.1	17.1
<b>GTA</b>	<b>2.6</b>	<b>14.5</b>	<b>16.3</b>	<b>13.0</b>

Source: Ontario Ministry of Finance and R.A.L. Consulting Limited

# Ontario

## Population Change by Region and Age Group, 2009 – 2019 (projected)

County/Region	15-19	County/Region	20-24	County/Region	25-29	County/Region	30-34
Peel	10,990	Peel	22,600	Peel	21,270	Peel	17,760
York	7,250	Toronto	13,890	Toronto	19,190	Toronto	16,920
Halton	3,090	York	13,150	York	14,130	York	10,980
Haliburton	-260	Halton	6,660	Durham	10,320	Durham	9,980
Prince Edward	-360	Durham	4,000	Halton	7,820	Simcoe	8,360
Manitoulin	-370	Ottawa	3,340	Simcoe	7,790	Ottawa	8,300
Parry Sound	-420	Simcoe	2,660	Ottawa	7,580	Halton	6,960
Dufferin	-420	Waterloo	1,670	Hamilton	5,180	Hamilton	6,120
Rainy River	-480	Hamilton	1,610	Waterloo	3,800	Middlesex	4,320
Sudbury	-600	Essex	980	Middlesex	2,730	Waterloo	4,180
<b>Durham</b>	<b>-4,540</b>						
<b>Toronto</b>	<b>-6,320</b>						

Source: Ontario Ministry of Finance and R.A.L. Consulting Limited

# Challenge

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☹️ How does York University in general, and the School of Administrative Studies in particular, position themselves to be the preeminent “university brands” in the GTA?

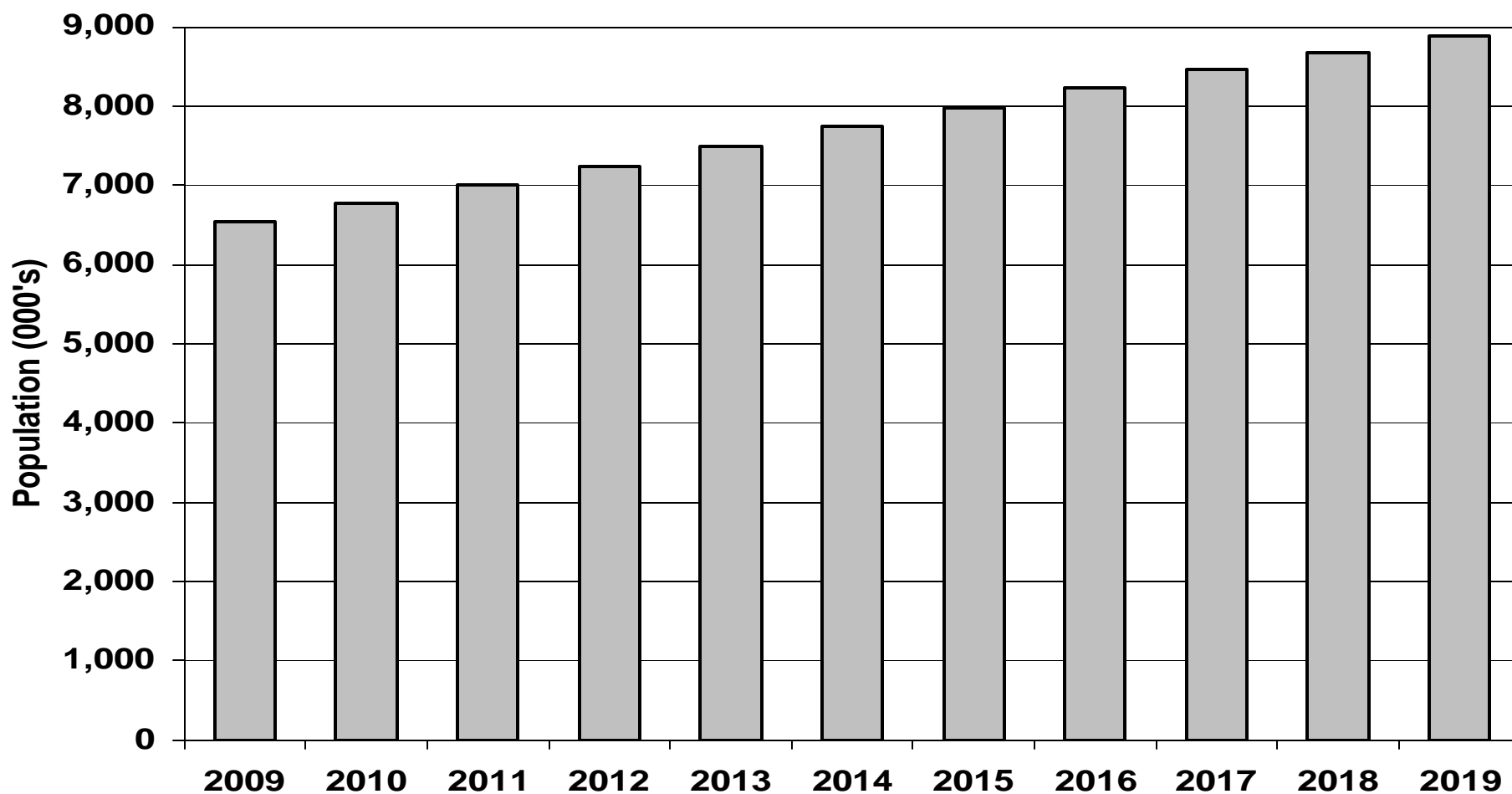
# Opportunity

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😊 Between 2009 and 2019, the number of people in their 50's will increase by 20% and the number in their 60's, by 40% (compared to 10% for those in their 20's). In addition, many in this 50+ age group will seek out “new retirement” options.

# Canada

## Population, 55 to 74 Age Group, 2009 to 2019 (thousands)



Source: Statistics Canada and R.A.L. Consulting Limited

# Canada

## Post-retirement Options, 2005 (percent)

Post-retirement Option	Percent Share of Respondents
Stop working completely	18
Work full-time, same work	3
Work full-time, different work	2
Work part-time	29
Work & leisure	22
Volunteer	19
Education	6
Don't know	1

Source: AARP, *International Retirement Security Survey*.

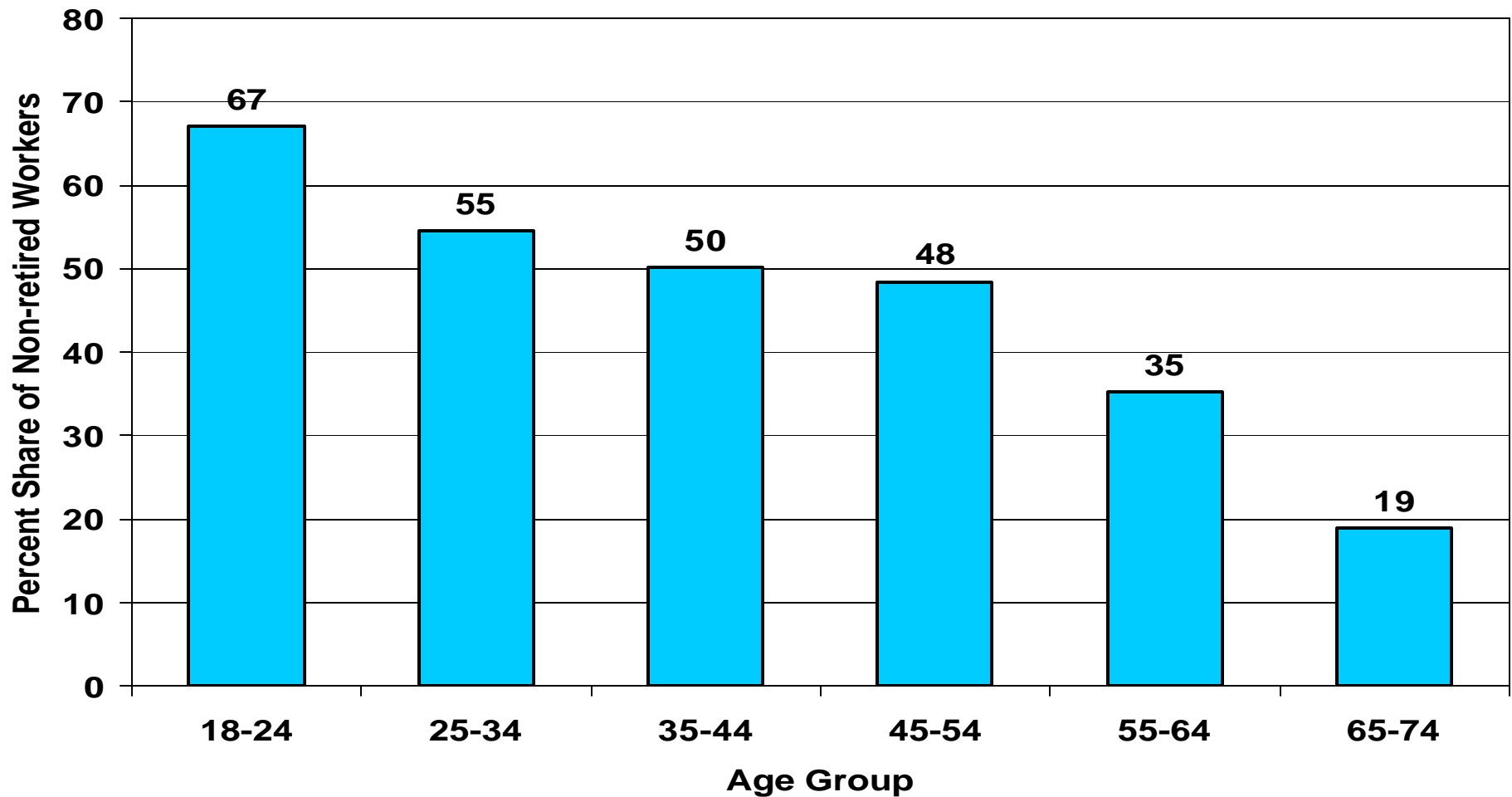
# Challenge

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☹️ Participation in formal work-related training declines with the age of the worker.

# Formal Work-related Training

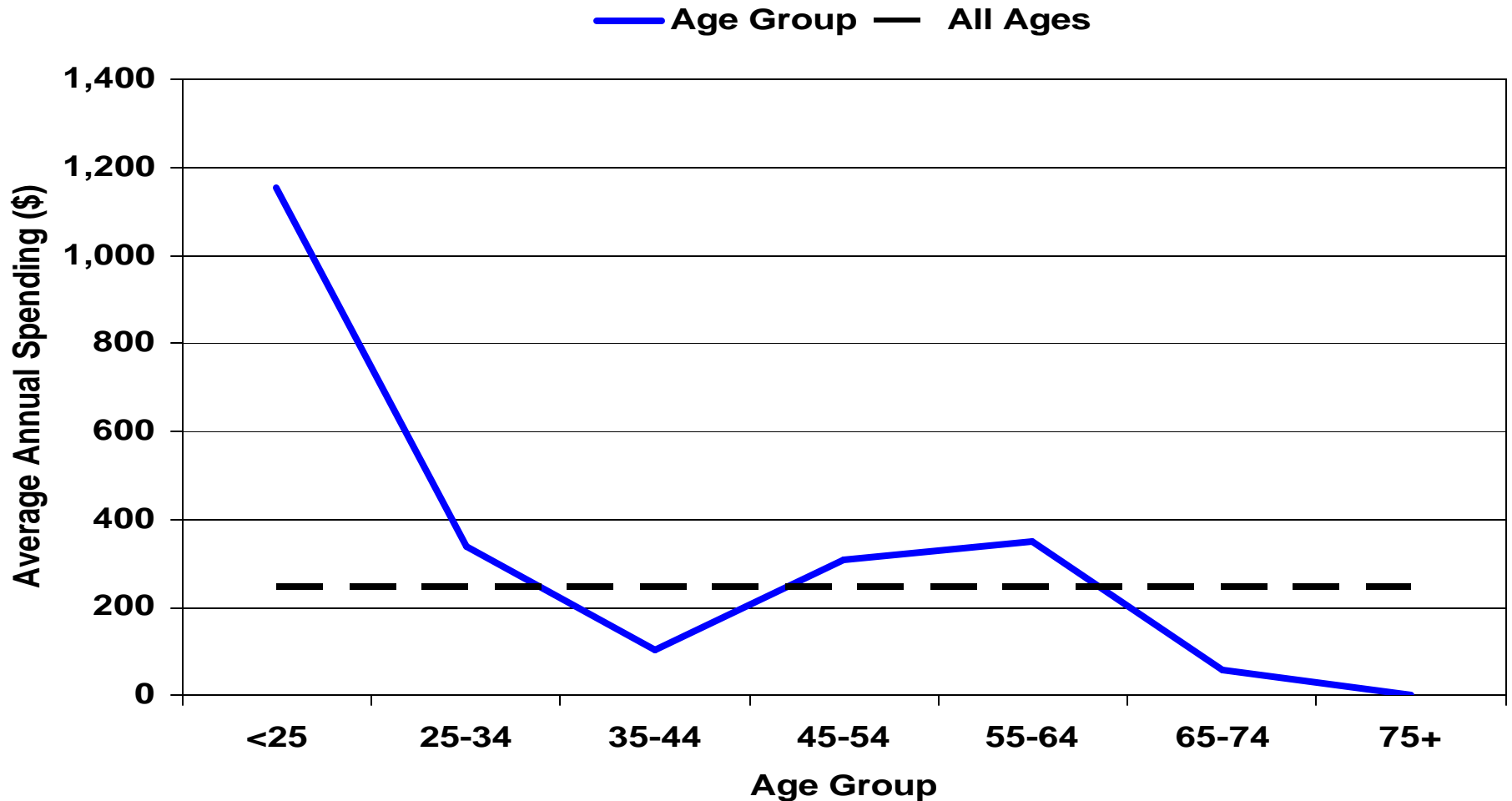
## Canada, Non-retired Workers, 2008 (percent)



Source: Canadian Council on Learning, *Survey of Canadian Attitudes Toward Learning, 2008*

# Post-secondary Tuition

## Household Spending per Person by Age, Canada, 2007



Source: Statistics Canada and R.A.L. Consulting Limited

# Increasing Participation in Training

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- Majority of workers engaged in formal training:
  - » Received financial support from their employer (e.g., 60 percent were paid while training)
  - » Had university education (70 percent)
- “Abstainers” cited financial concerns as key to their participation:
  - » 60 percent willing to take training if they are paid

# Opportunity

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☺ Some demographic groups have had limited participation in university-level education.

# Canada

## Highest Level of Educational Attainment, 2006 (percent)

Highest Level of Attainment	Aboriginal			Non-Aboriginal		
	All Ages			All Ages		
	Both	Men	Women	Both	Men	Women
No certificate, diploma or degree	43.7	22.1	21.5	23.1	11.4	11.7
High school certificate or equivalent	21.8	9.9	11.9	25.7	11.9	13.8
Apprenticeship or trades certificate or diploma	11.4	7.1	4.3	10.8	6.9	3.9
College, CEGEP or other non-university certificate or diploma	14.5	5.6	9.0	17.4	7.5	9.9
University certificate, diploma or degree	8.6	3.1	5.5	23.0	11.0	12.1
Highest Level of Attainment	15-24			15-24		
	Both	Men	Women	Both	Men	Women
	No certificate, diploma or degree	62.6	32.5	30.0	38.7	21.0
High school certificate or equivalent	25.8	12.1	13.8	36.9	18.9	17.9
Apprenticeship or trades certificate or diploma	3.7	2.3	1.4	4.4	2.7	1.7
College, CEGEP or other non-university certificate or diploma	5.5	2.2	3.4	11.2	4.9	6.3
University certificate, diploma or degree	2.4	0.8	1.6	8.8	3.5	5.3
Highest Level of Attainment	25-34			25-34		
	Both	Men	Women	Both	Men	Women
	No certificate, diploma or degree	31.9	16.6	15.3	10.0	5.8
High school certificate or equivalent	26.2	12.4	13.8	22.4	12.2	10.2
Apprenticeship or trades certificate or diploma	11.8	7.2	4.6	10.4	6.3	4.1
College, CEGEP or other non-university certificate or diploma	18.9	7.0	11.9	22.9	10.1	12.8
University certificate, diploma or degree	11.2	3.9	7.2	34.4	14.5	19.8

Source: Statistics Canada and R.A.L. Consulting Limited

# Challenge

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☹️ Three in five Aboriginals between the ages of 15 and 24 have no certificate, diploma, or degree. One in five non-Aboriginals in the same age group have no certificate, diploma, or degree.

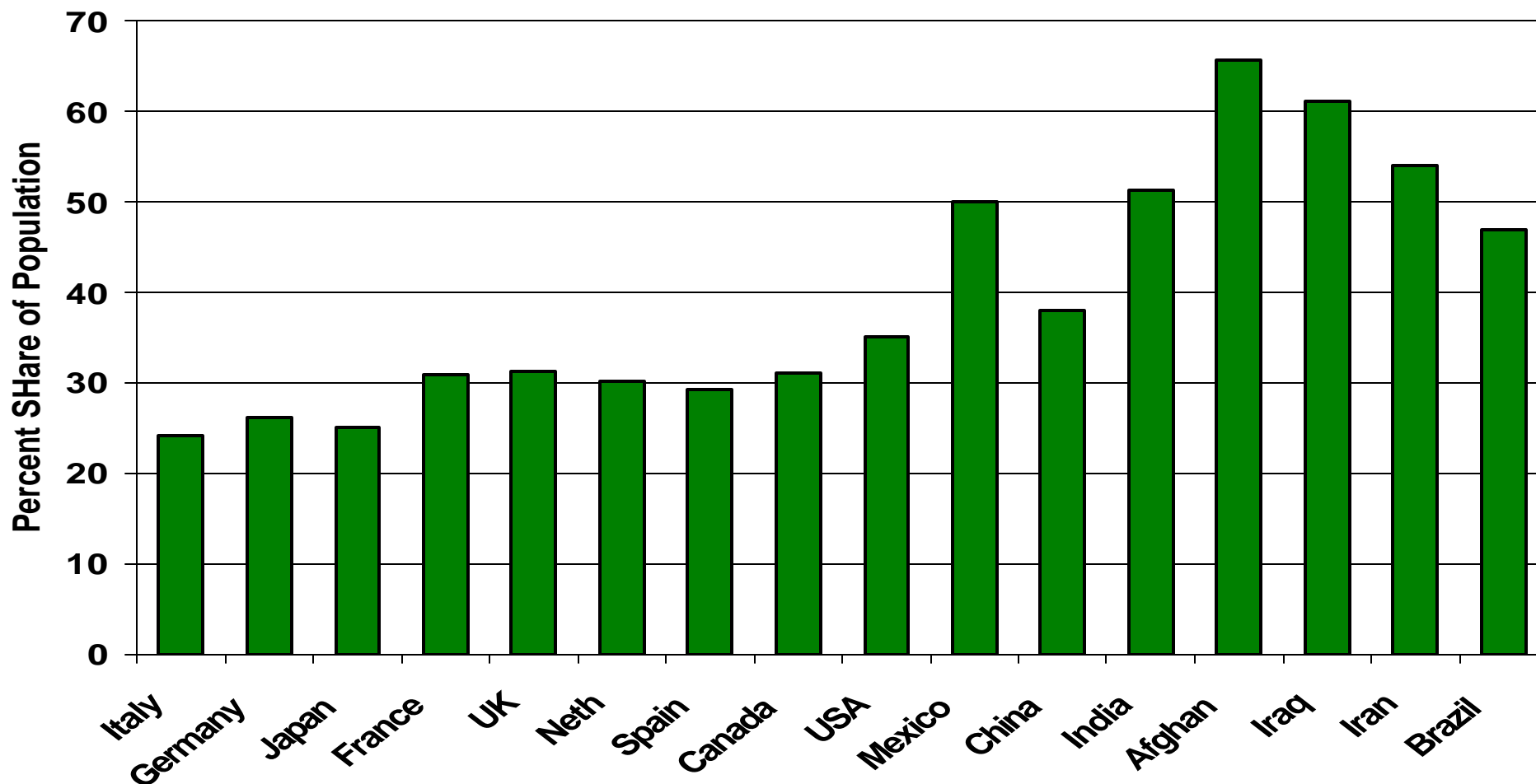
# Opportunity

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😊 “Developing” countries have a higher share of their population under the age of 25 than is the case in “developed” countries.

# Population Under 25

## Selected Countries, 2005 (percent)



# Challenge

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☹️ If you build it, can they and will they come.

# Opportunity

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😊 Information technology offers a variety of ways to communicate with students  
**BUT ...**

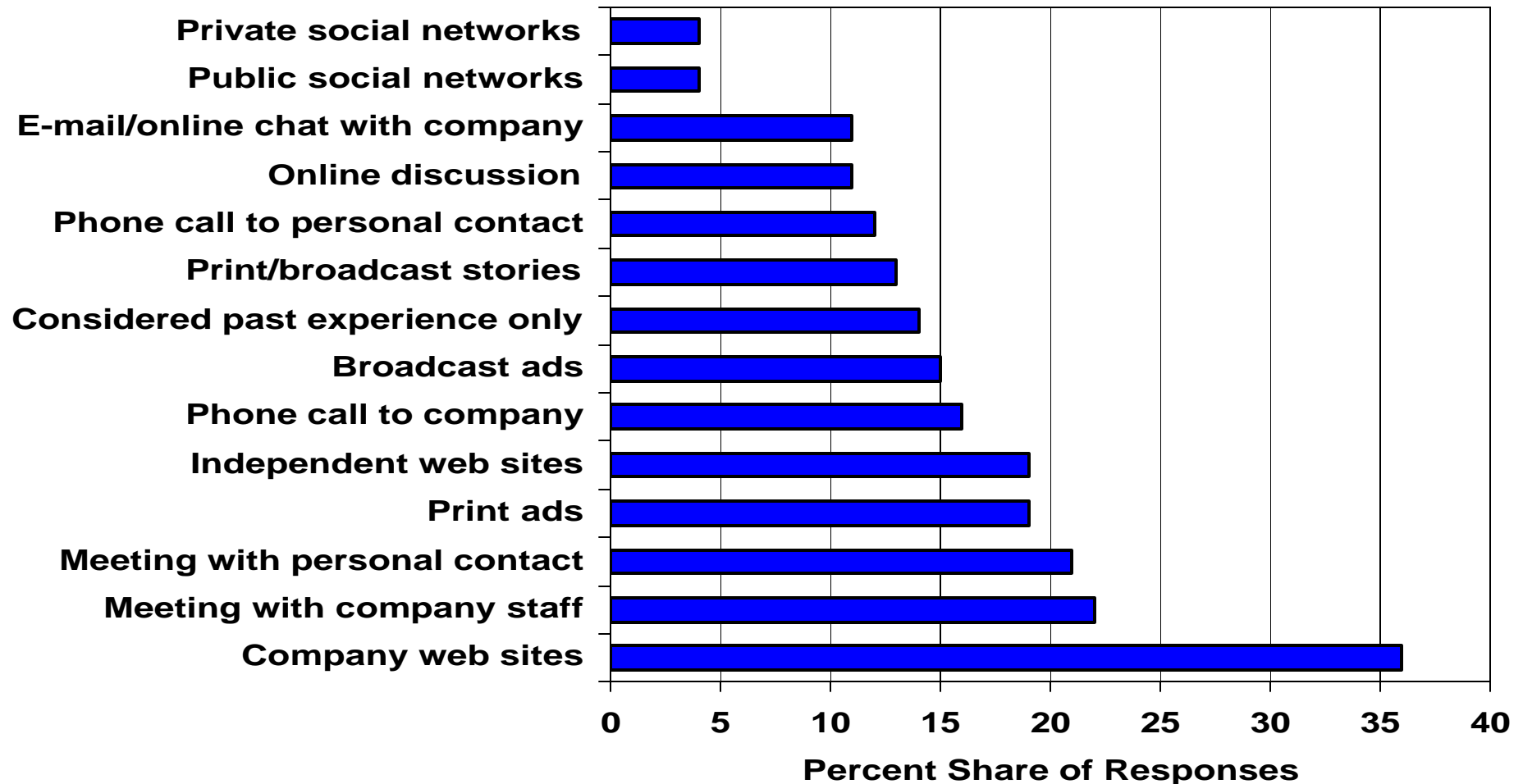
# Challenge

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☹️ BUT if you tweet them, will they all respond?

# Information Sources for Purchase Decisions

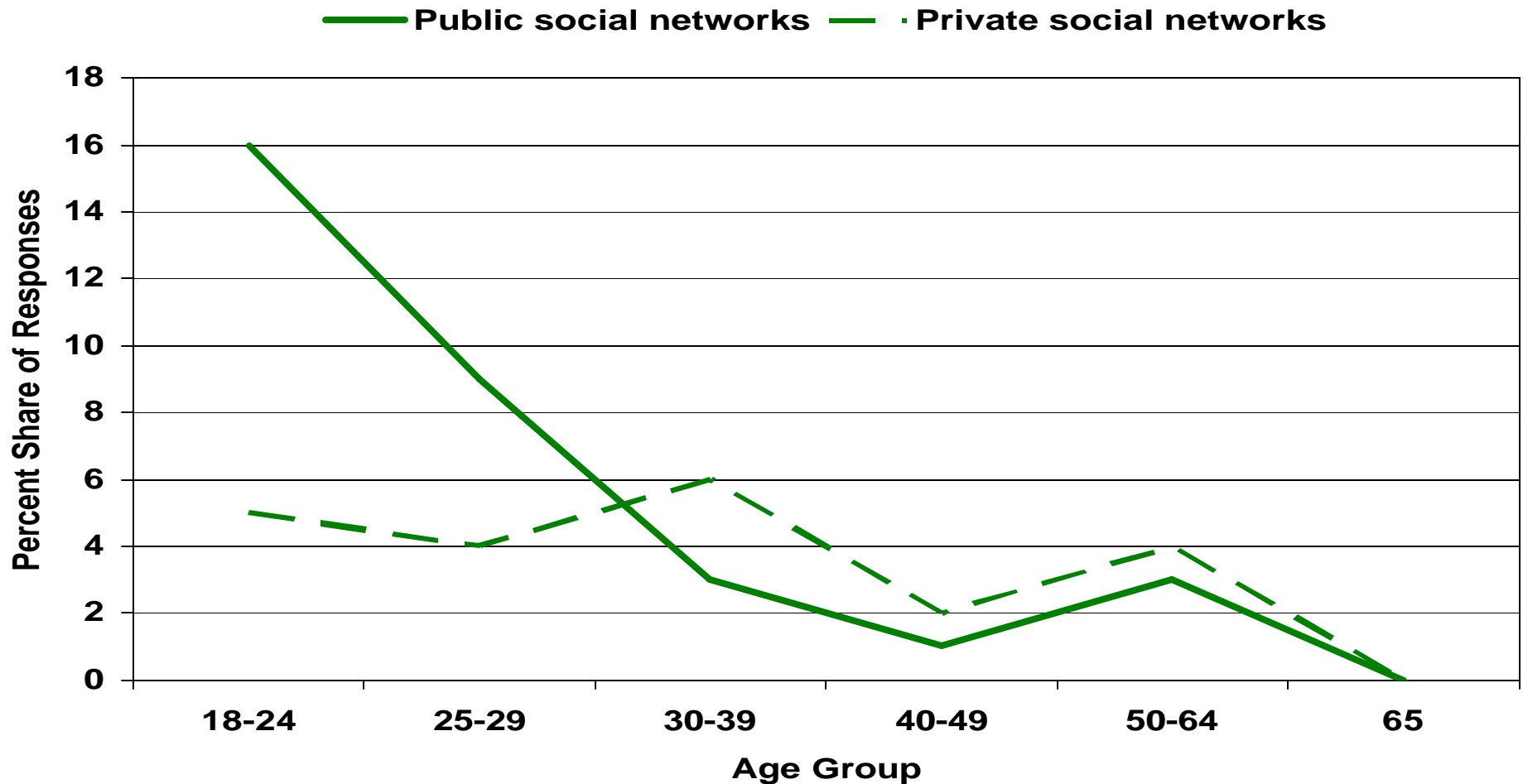
## United States, 2009 (percent)



Source: The Harris Poll; June, 2009.

# Information Sources for Purchase Decisions

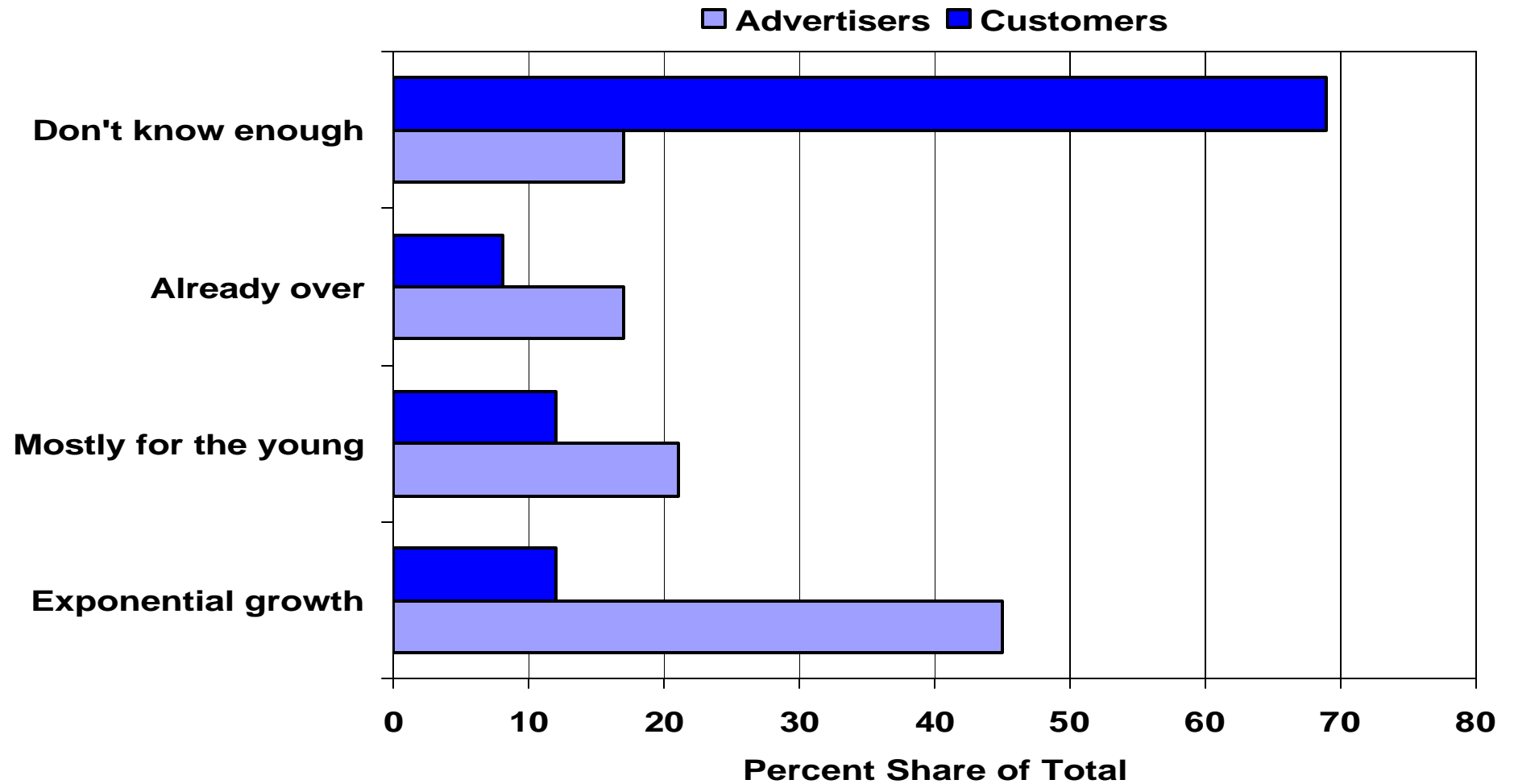
## United States, 2009 (percent)



Source: The Harris Poll; June, 2009.

# Opinions on Twitter

## United States, 2009 (percent)

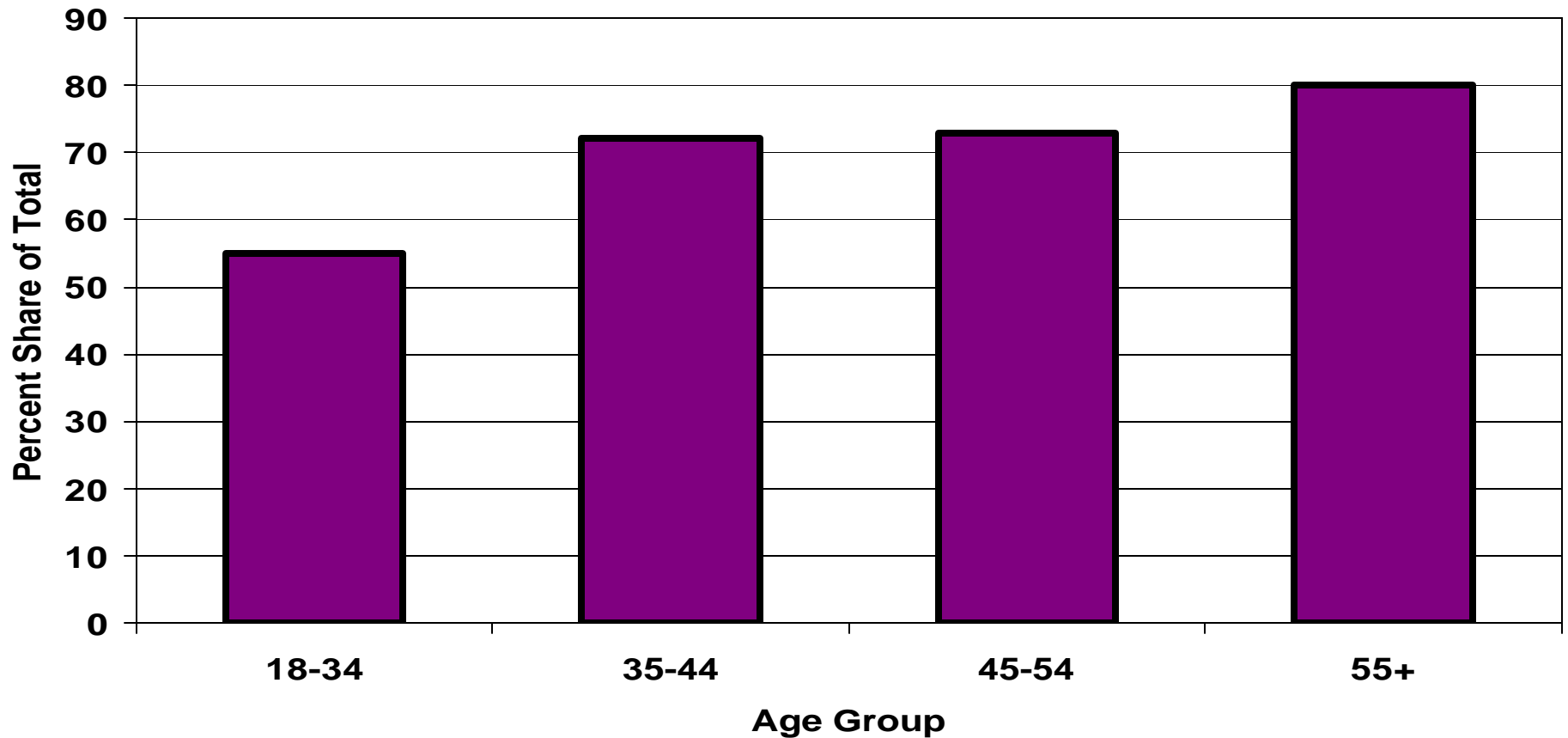


Source: The Harris Poll; July, 2009.

# Opinions on Twitter

## United States, 2009 (percent)

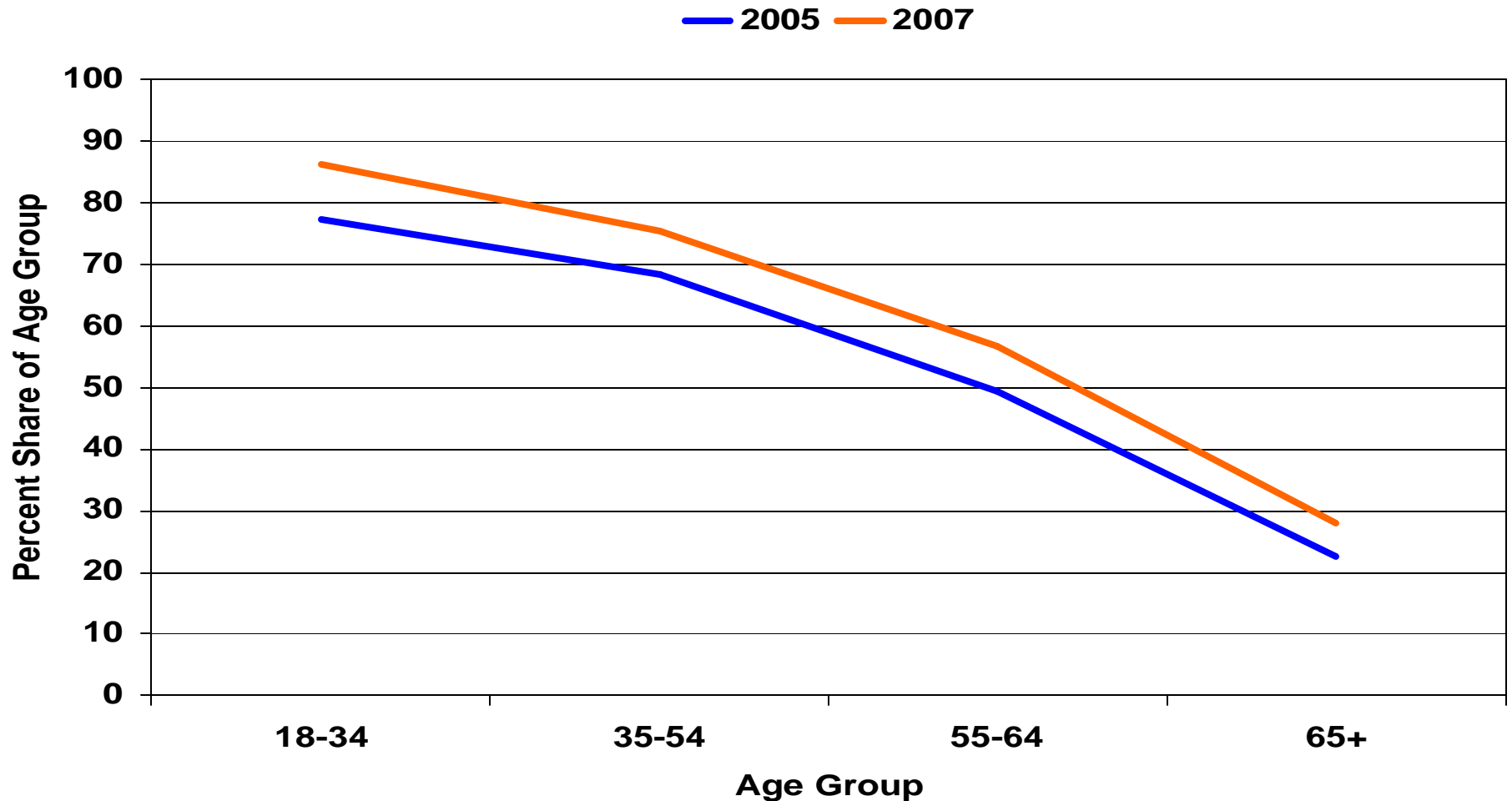
I don't know enough about Twitter to have an opinion



Source: The Harris Poll; July, 2009.

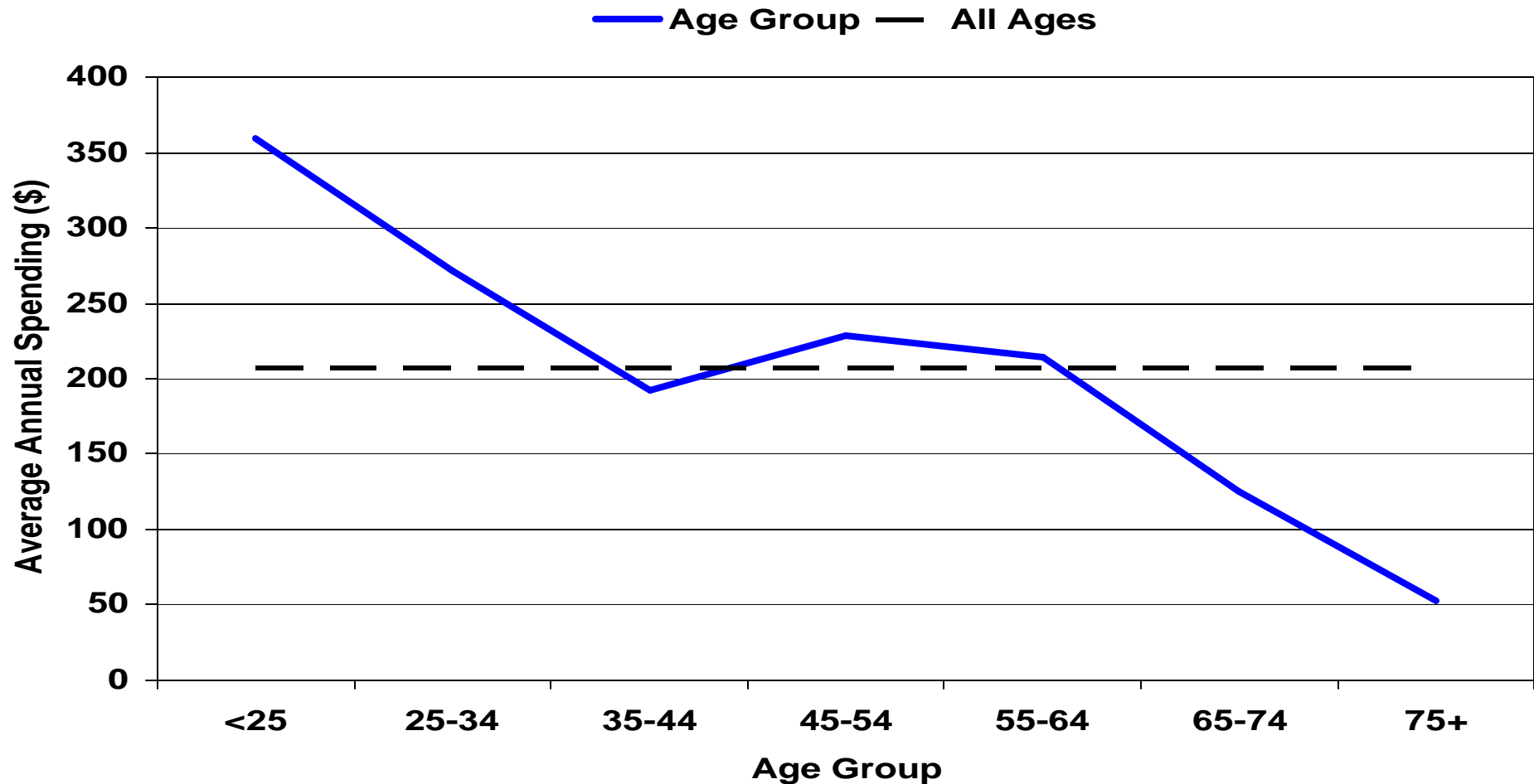
# Home Internet Users by Age (percent)

Canada, 2007



Source: Statistics Canada and R.A.L. Consulting Limited

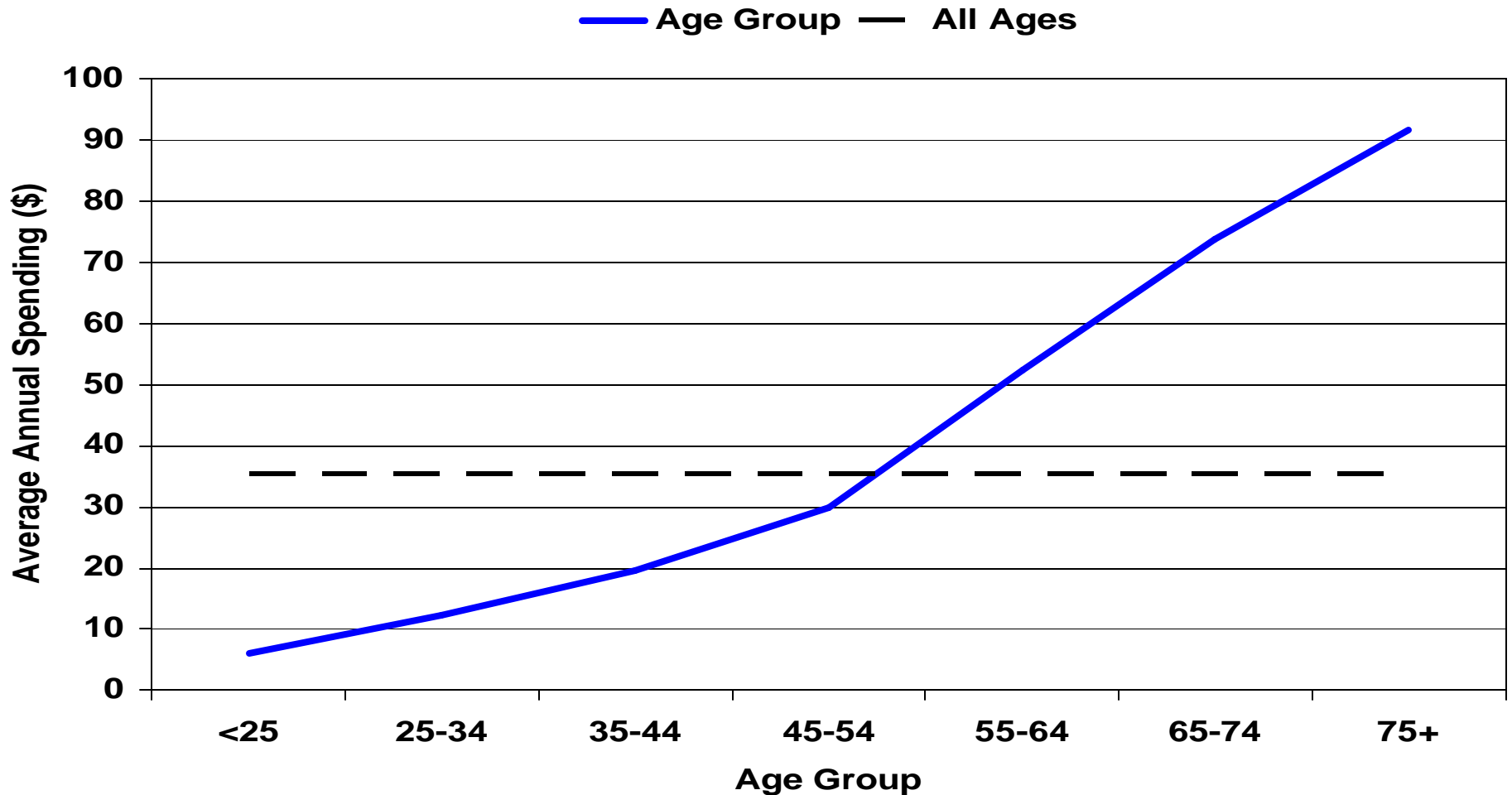
# Cell Phone, Pager, and Text Messaging Household Spending per Person by Age, Canada, 2007



Source: Statistics Canada and R.A.L. Consulting Limited

# Newspapers

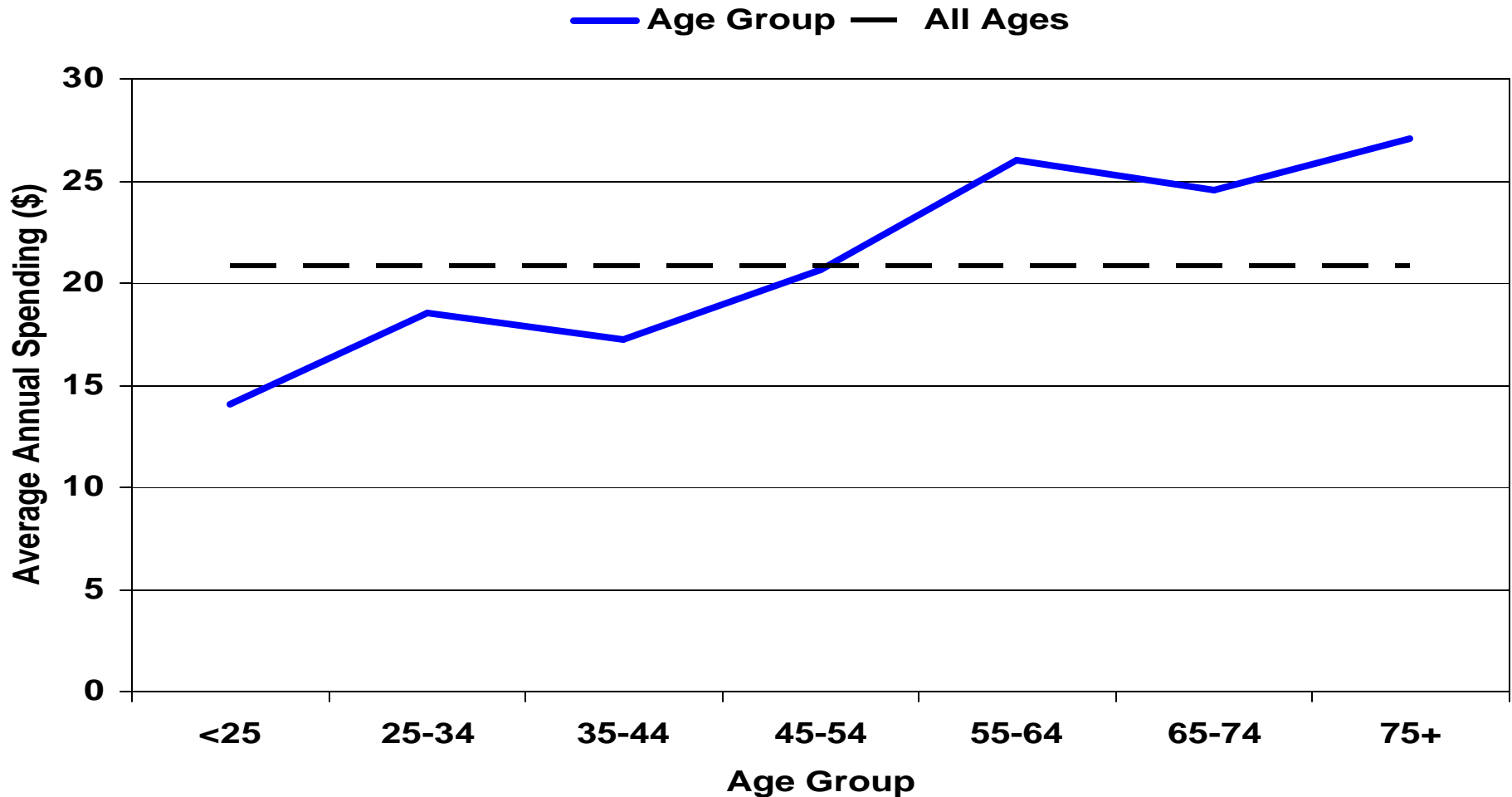
## Household Spending per Person by Age, Canada, 2007



Source: Statistics Canada and R.A.L. Consulting Limited

# Magazines and Periodicals

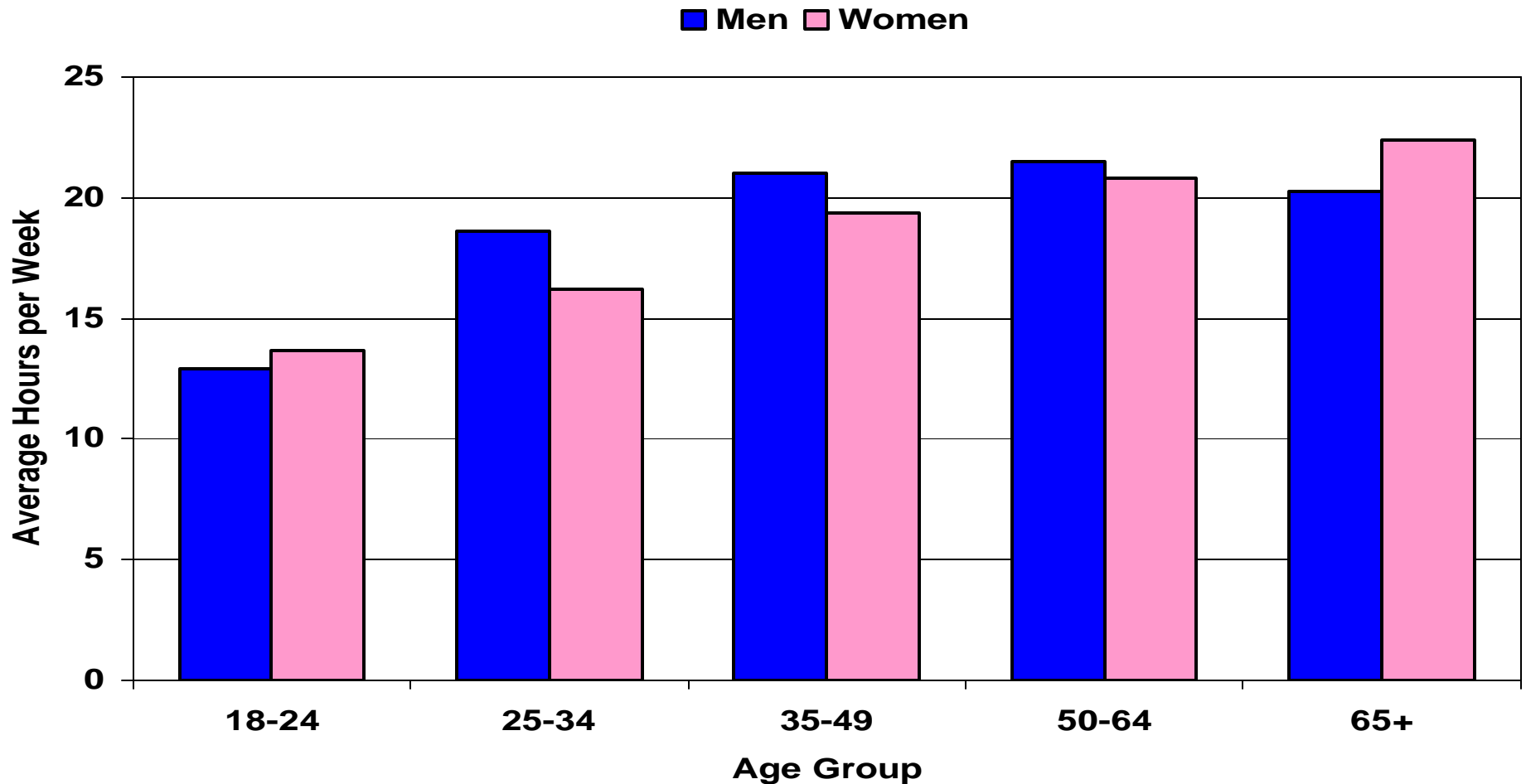
## Household Spending per Person by Age, Canada, 2007



Source: Statistics Canada and R.A.L. Consulting Limited

# Radio Listening (average hours per week)

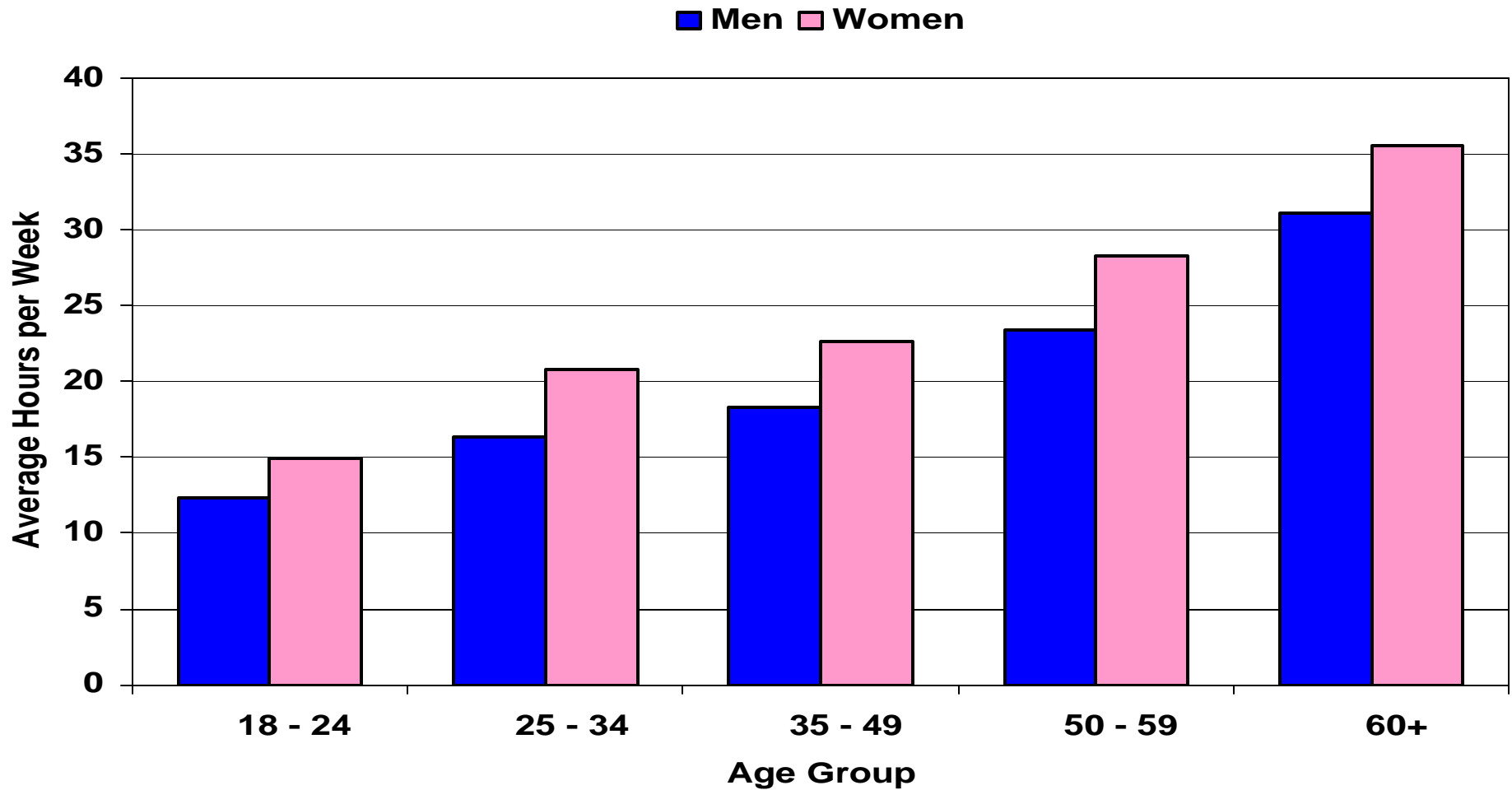
Canada, 2007



Source: Statistics Canada and R.A.L. Consulting Limited

# Television Viewing (average hours per week)

## Canada, 2004



Source: Statistics Canada and R.A.L. Consulting Limited

# Key Points

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- Ontario's demographic trends:
  - » The **boomers** are all over the age of 40
  - » Population aging reflects:
    - Below replacement fertility
    - Increased life expectancy
  - » Notwithstanding the increasing importance of immigration as a population source, the population aging trend will continue over the next ten years with substantial increases in the 55-plus age groups

# Key Points

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- Ontario's demographic trends (continued):
  - » Aging pattern varies by region
  - » GTA has the youngest population
  - » Ethnic/racial diversity of population is increasing, especially in the GTA, as a result of immigration

# Key Points

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- Demographic trends and Ontario's universities:
  - » *"It's yours to lose"* → Population growth will be substantial in the GTA BUT growth does not equal brand choice
  - » *"The times they are a-changin"* → Mature workers, young men, aboriginals, and foreign students must be a greater part of the mix
  - » *"Show me the money"* → Employer (or government) financial assistance is the key to increasing participation in work-related training
  - » *"Everybody's not tweeting"* → A "hybrid" approach to marketing and learning works best with a more demographically diverse student body

# Disclaimer

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