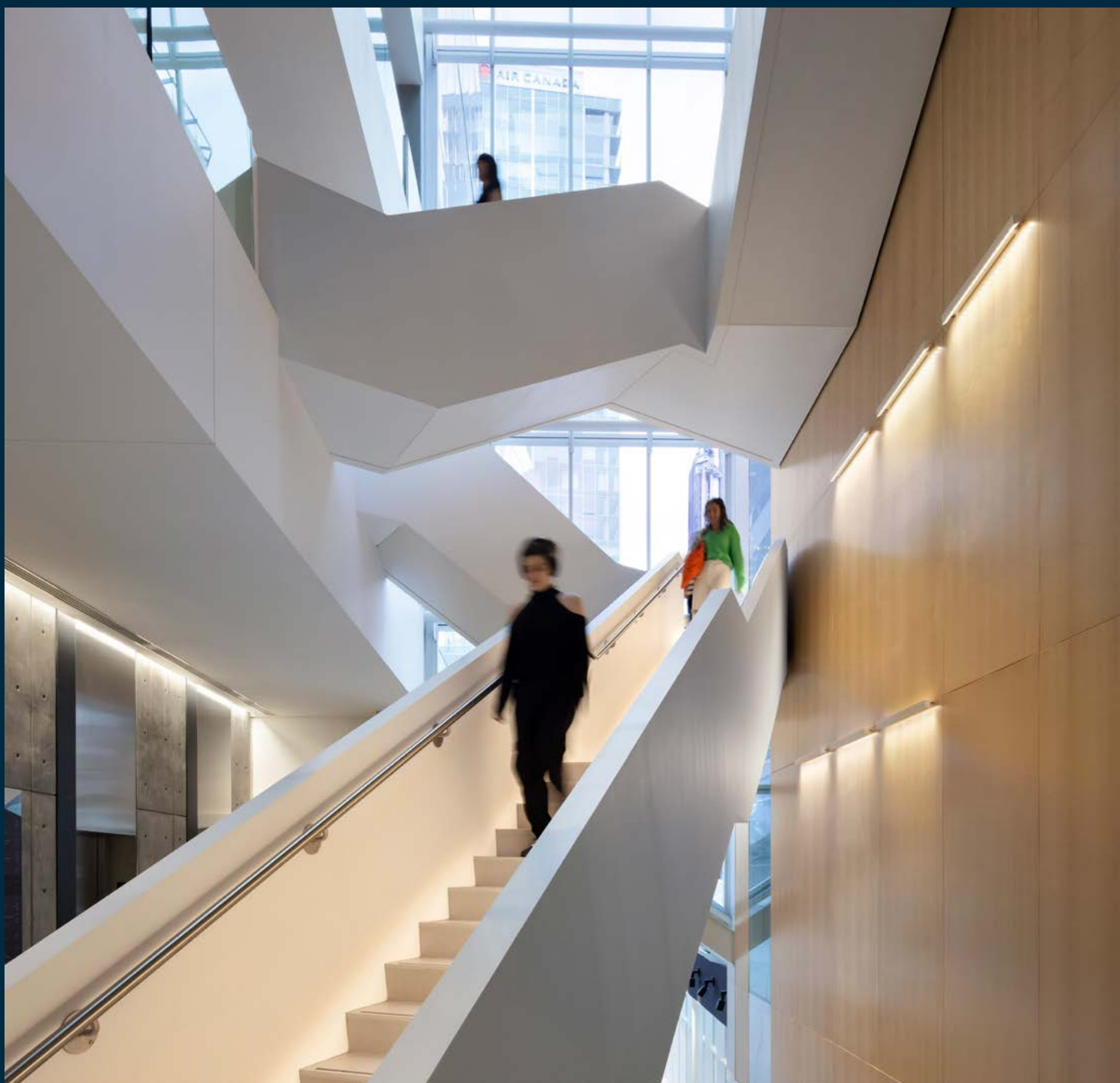


The State of Postsecondary Education in Canada

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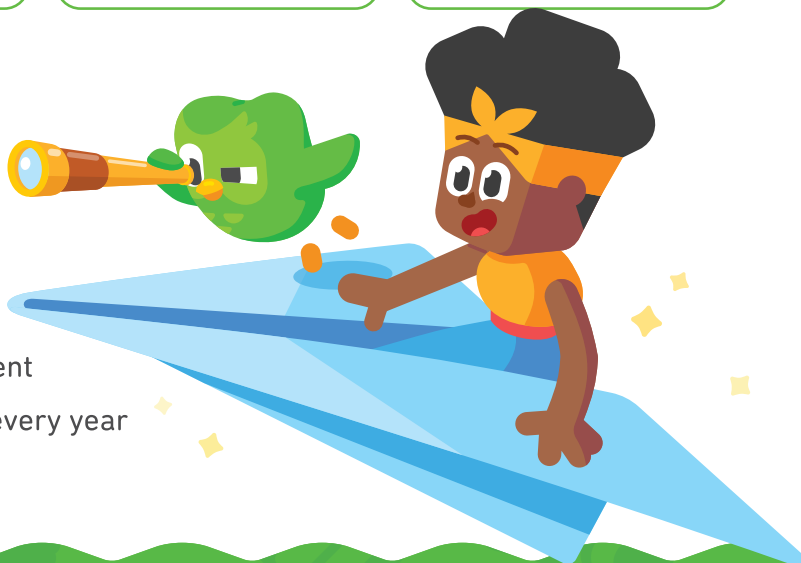
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About This Series

Despite having one of the world's more advanced and high-quality systems of higher education, Canada has never been blessed with easily available, up-to-date and easily digestible data on its postsecondary sector. The purpose of Higher Education Strategy Associates' annual State of Postsecondary Education in Canada series is to change that—permanently.

Canada's national higher education data challenges partially stem from the decentralized nature of our federal system. But the bigger reason is that Canadian governments and statistical agencies simply do not produce high-quality data on education in the way some other countries do. Canada's data on community colleges are weak. Though our data on institutional finances is as good as any in the world, data on employees (in particular non-academic ones) is scant, comprehensive data on student assistance is essentially non-existent, and data on students and graduates take an inordinately long time to appear. Data on international students, for instance, routinely take three to four times as long to appear in Canada as they do in the US, the UK, or Australia.

This series is not the first attempt to present this kind of data on a national basis. Over the years, others have done notable and salutary work trying to fill the myriad data gaps. The Canadian Association of University Teachers (CAUT), for many years published an invaluable annual almanac, and Universities Canada put together some good publications on the state of the system. However, both have essentially ceased their activities in this area in recent years, and in any event, their work never included the colleges and polytechnics. The Council of Ministers of Education, Canada (CMEC) has an irregularly published set of "Education Indicators" but not many

of these relate to postsecondary education and in any case are largely tabular, with little to nothing in the way of data interpretation. Statistics Canada produces a great deal of data on education – and although some of its analysts produce excellent studies on student and graduate outcomes, it does very little to help people interpret the system as a whole.

And so, in 2018, Higher Education Strategy Associates decided to produce an annual publication called "The State of Postsecondary Education in Canada", modelled on a set of publications produced by Andrew Norton and colleagues at the Grattan Institute in Melbourne entitled "Mapping Australian Higher Education". This ninth edition of the publication updates data from the previous editions, including detailing trends in student and staff numbers, how the system is financed, and graduate outcomes. Over the years this has expanded from about a slim 60-page volume to the roughly 120-page behemoth you have in front of you, and given the availability of data, it has probably reached something close to its final form; the only new segment this year is an explainer on international student statistics in Chapter 1, which also delves into the question of how much further international student numbers – and international student tuition dollars – are likely to fall.

We hope that by putting all this information in a handy and convenient format, and by providing some accompanying narrative, we can help improve the quality of public dialogue on postsecondary education policy issues. As always, comments or suggestions about how to improve the publication for future years will be gratefully received. Just email us at info@higheredstrategy.com.

Happy Reading.

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Introduction

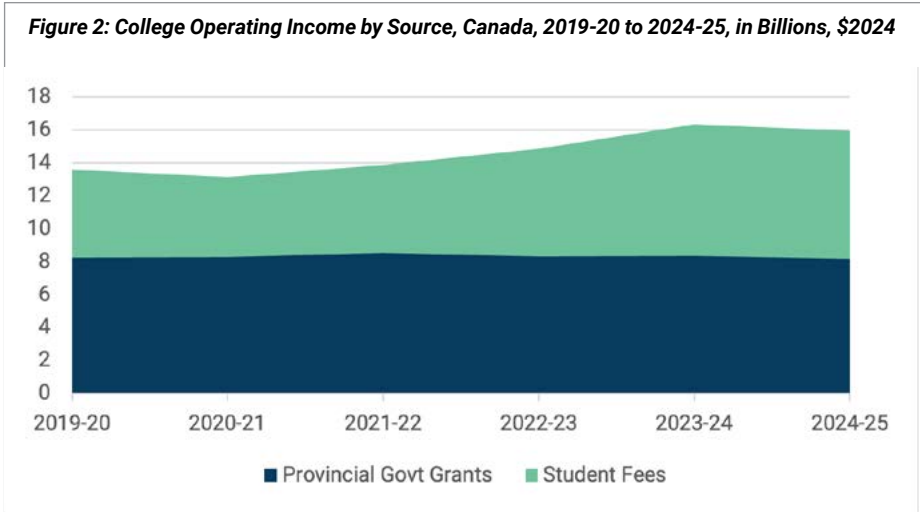
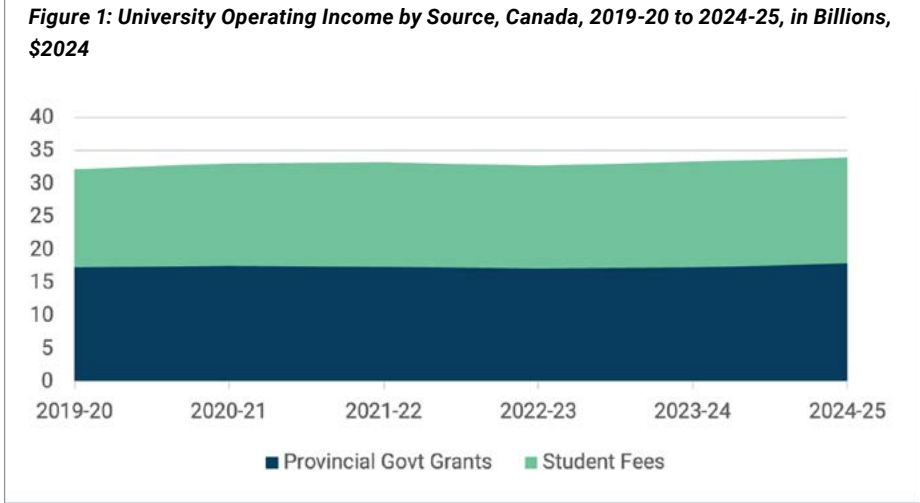
In the process of writing this report, one thing became glaringly evident: the crisis in Canadian post-secondary finances is showing up everywhere except the data.

The reason for this is fairly simple: as a country, we do not produce statistics in a timely manner. Statistics Canada’s most recent data on enrolment comes from the fall of 2023, and while it is possible to update those figures by a year using other public statistics, that still leaves us almost two years away from current realities. Similarly, current financial data covers up to 2024-25 for universities but only 2023-24 for colleges. Again, this data can be updated to some extent by using other public sources, but only by a year. None of it is really recent enough to show the severity of what is currently happening at universities and colleges.

Take, for instance, figures 1 and 2, which illustrate what we know about university and college finances as close to the present day as public data can take us. Figure 1 looks at operating income (that is, provincial government grants plus fees from students) for universities, essentially shows nothing but stasis. Figure 2, which presents the same for colleges, is slightly more interesting in that it shows a small decline in 2024-25 but, on the whole, still suggests the current situation is healthier than at any time other than 2023-24.

It seems ridiculous, in a publication entitled “the State of Postsecondary Education in Canada” to simply leave it at that. The system is in crisis, whatever our sluggish and sclerotic data systems may say. And so, this introduction is meant to shine a light on what has happened over the past year and a half, and what may lay ahead.

To look at financial data beyond early 2025, we have to rely on what individual



institutions have published about their own finances. At the time of writing, financial statements have been published by about half of the country’s universities (albeit with major gaps in Ontario and Québec). On the college side, Ontario and British Columbia are relatively complete, but data from elsewhere is nearly entirely missing. This still allows us to make a few significant observations, particularly about Ontario colleges, which experienced the brunt of the impact of federal government changes to international student visas.

Figure 3 shows the one-year change in income at individual Ontario colleges from 2024-25 to 2025-26. With the sole exception of Collège Boréal, the impact of the federal visa changes was absolutely savage. In that year, system-wide fee income fell by 41%, and total income fell by \$2.3 billion, or 30%. Roughly two-thirds of this revenue loss was absorbed by reducing expenditures; the remainder was absorbed by allowing institutional financial positions to erode. The system as a whole went from an 8% net surplus to a 3% net deficit. Some of that loss will have to be made up through cuts implemented in

future years; in other cases, institutions will simply have to survive with much smaller financial margins than they did in the past. The picture in British Columbia is less dramatic, both because the province's colleges were less reliant on international students than those in Ontario, and because those international students tended to be enrolled in longer-duration programs. Still, sector-wide in British Columbia, the drop in income was about 7%.

The university results are perhaps a bit more surprising. As Figure 4 shows, among those institutions for which we have data for both 2024-25 and 2025-26, both total income and total expenditure actually rose, even as income from student fees fell (note: fee income here is fees from all students, so the drop in international student fee income is probably larger than this, probably by a factor of 2x). Partly, this result reflects an increase in provincial government expenditures, as documented in Chapter 4 of this report. Perhaps more to the point, it suggests that universities have yet to really feel the full extent of the impact of the drop in international student numbers. (Note also that these numbers may change somewhat as more institutions report).

To understand how the impact of the federal cap on student visas impacts colleges and universities differently over time, we need to take a deeper dive into what has happened to visa approvals over the past few years. Figure 5 shows the number of new visas approved by the Government of Canada, by institution type, from 2021 to 2026 (the Government does not routinely publish data at this level of disaggregation: the data is courtesy of ApplyBoard). In this graph, 2026 is an imputed value based on year-to-year comparisons for the months of January to June with those of the previous year. As is plain, both the run-up and the collapse in visa numbers impacted the college sector much more than the university sector. Between 2023 and 2025, visa approvals for universities fell by two-thirds, but for colleges the drop was nearly 95%.

Figure 3: Change in Total Income, Ontario Colleges, 2024-25 to 2025-26

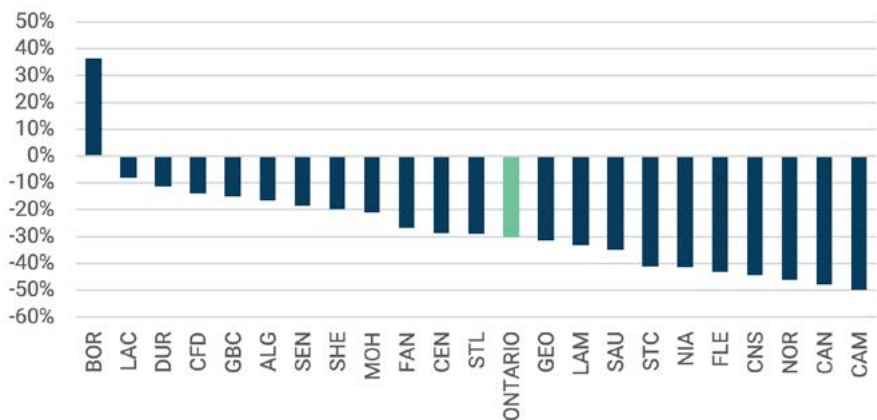


Figure 4: One-Year Change in Financial Results, Reporting Canadian Universities, from 2024-25 to 2025-26

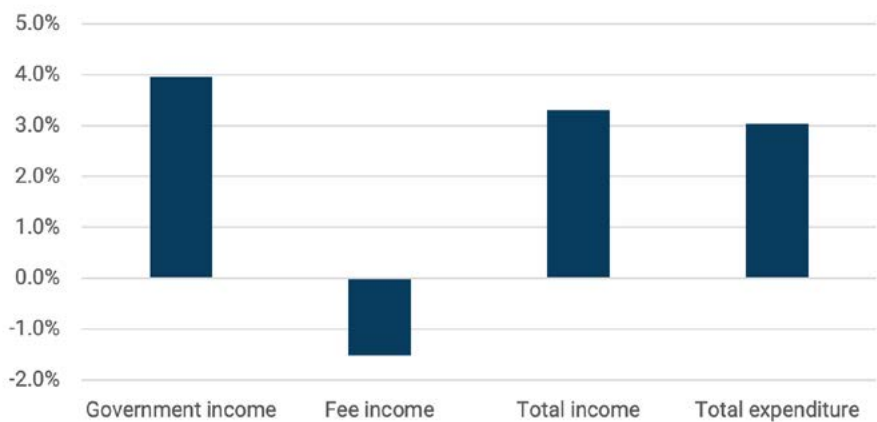
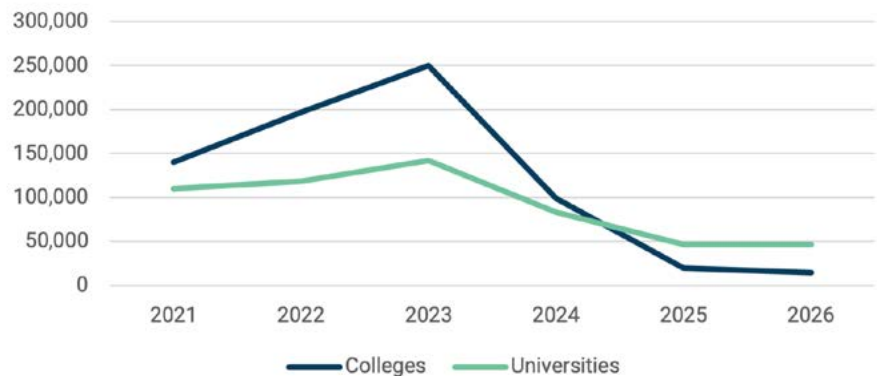


Figure 5: New Student Visa Approvals, by Institution Type, Canada, 2021-26



But remember: these figures are for *new* student arrivals, not *total* student numbers. It takes some time for changes in the number of new students to

affect total student enrolment numbers, for the simple reason that it takes time for students to graduate. It is impossible to know from existing public data exactly

how long this takes in each sector, but a reasonable assumption given different program lengths is about three years on average in universities and about a year and a half in colleges, with some taking less time and others taking longer. In full, it could take up to six years for a decline in new international students to work its way fully through the system.

With these reasonable assumptions about student attrition and completion, and assuming that the 2025-26 numbers become a “new normal,” it is possible to estimate how international student numbers will evolve over the rest of the decade. Figure 6 shows the change in international student numbers in colleges and universities from 2023-24 out to 2030-31. As can be seen, the effects of new visa reductions occur much more quickly in colleges than in universities. This is not just because of the larger drop in visa approvals, but also because of colleges’ shorter program lengths. According to this estimate, total numbers in colleges dropped by 60% in the first two years after the visa changes, while on the university side it will take six years to fall the same distance.

It is a relatively simple matter to apply the data from Figure 6 to existing estimates of institutional revenue from international student tuition fees, and including a future rise in international student fees consistent with those seen in the past couple of years. In 2023-24, these sums amounted to about \$8.4 billion for universities and \$5.5 billion for colleges, with about 70% of the latter concentrated in Ontario. Figure 7 shows how changes in international student enrolment will affect these figures. The estimated \$3 billion drop in 2023-26 for colleges is fairly consistent with data presented in Figure 3 above. That means the worst is over; however, nationally, the sector is still likely to experience another \$1 billion fall in revenue in 2026-27 and another \$500 million in 2027-28 as the final remnants of the boom cohorts depart.

On the university side, however, because the decline in international student fees

Figure 6: Indexed Estimated International Student Numbers, 2023-24 to 2030-31, 2023-24 = 100

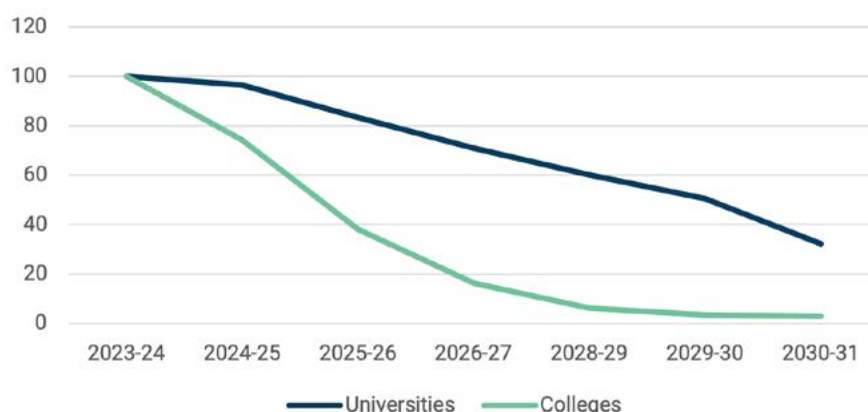
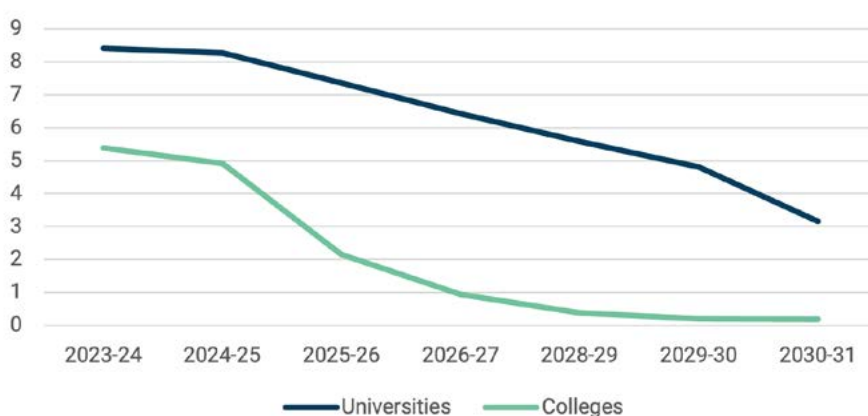


Figure 7: Projected Income from International Students, 2023-24 to 2030-31, in billions of \$2025



is more protracted than in colleges (again because of differences in how long it takes for a cohort to cycle through), universities have so far only lost about \$1 billion in international student fees. However, it will continue to lose that much again each year all the way out to 2030-31. The adjustments we have seen in the past eighteen months may therefore be repeated more than once in the coming years: in total, the remaining adjustment in universities amounts to about 11% of total current income.

The future is, of course, unlikely to unfold exactly as Figure 7 suggests. At some point, visa numbers will presumably rise again and put a floor under these numbers. But considerable damage will have

been done, and there is little hope that increases in public funding will be able to erase what has happened here. That would require provincial spending to increase by about \$6 billion, or about 30%, over the next five years. While some increase is possible – Ontario, for instance, has already announced an increase of \$1 billion for next year – an increase of the magnitude needed seems unlikely given an aging population, competing political priorities and, particularly in Québec and British Columbia, some deeply unbalanced budgets.

In other words, there is light at the end of the tunnel, but it’s still some distance away. This saga still has a ways to go.

CHAPTER ONE

Learners

01

KEY POINTS

- ▶ Fueled by strong growth in international student numbers, 2024-25 saw the highest ever enrolment in public post-secondary education in Canada. Total enrolment in public universities and colleges is now estimated at 2.33 million, down slightly from the year before. Increases in the number of registered apprentices, which add another 498,000 to the total, more than offset this decline, however.
 - ▶ At universities, enrolment in the Sciences, Engineering and Health fields continues to grow. The rates of growth in Business and Social Sciences have declined significantly in the past five years. The Humanities continue to experience significant enrolment decline.
 - ▶ Nearly half (49%) of first-year students in 2025 indicated they identify as visible minorities, up from just 14% in 2001.
 - ▶ Women make up a significant majority of students in both universities and colleges, but they remain hugely underrepresented in the fields of Engineering and Technology.
 - ▶ In 2024-25, international students accounted for 19% of students at the university level and 28% at the college level. In Ontario, international students made up nearly half of the student body at the college level.
-

Learners

As of 2024, over 2.8 million individuals are enrolled in Canada’s universities, colleges, or registered apprenticeship programs. This represents 6.9% of the entire population, a figure that is larger than the population of the four Atlantic provinces put together, or roughly the number of employees in the construction and manufacturing industries combined. This chapter provides a high-level overview of the Canadian student population: who they are, where they study, and what they study.

1.1 ENROLMENT TRENDS IN POSTSECONDARY EDUCATION

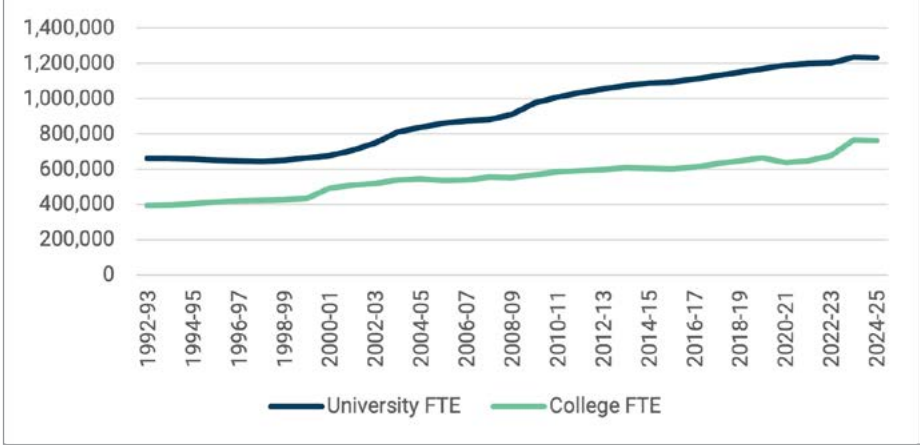
Enrolments in universities and colleges have been rising steadily in Canada since the turn of the century. Before that, throughout the 1990s, total enrolment (full-time and part-time) remained relatively unchanged, hovering between 1.3 and 1.4 million annually. After 1999, however, enrolments began to increase until they reached 2 million in 2011-12, at which point growth slowed until around 2016, when a surge in international student enrolment drove further increases. In 2023-24, the last year for which Statistics Canada provides complete enrolment data, the reported total headcount enrolment was just over 2.34 million. Based on institutional and provincial data, which was available for over 90% of the country, that total decreased by about 11,000 to 2.33 million in 2024-25 as a number of international students began leave after the federal government’s introduction of

new restrictions on student visas. Other than the COVID year 2020-21, this is the only time this century that enrolments have declined.

Figure 1.1 shows changes in full-time equivalent (FTE) enrolment in Canada’s universities and colleges over the past 30 years.¹ As of 2024-25, there were just over 1.94 million FTE students in Canadian

PSE institutions, with 38% of these enrolled in colleges and the remaining 62% enrolled in universities. For most of this century, enrolments have been growing more quickly in universities than in colleges, though this is partly due to the conversion of several institutions in Alberta and British Columbia from college to university status. Since the onset of the COVID pandemic, however, this pattern

Figure 1.1: Full-time Equivalent Enrolments by Sector, 1992-93 to 2024-25



¹ The term “full-time equivalent” (FTE) in Canada is a mathematical approximation equal to full-time students plus [part-time students/3.5]; it does not mean actual full-load equivalents based on credits taken.

has reversed, mainly due to colleges' more aggressive recruitment of international students.

Canadian provinces differ vastly in population size, and so too do enrolments in provincial systems of higher education. For example, Ontario has the country's largest university system, representing roughly 45% of total national enrolments, despite having just 39% of the country's population. Québec, with just 22% of the country's population, has over 28% of the college students, due mainly to the CEGEP system's status as a prerequisite to university study (see Appendix A for more on CEGEPs).

1.2 ENROLMENT TRENDS IN UNIVERSITIES

In the late 1990s, full-time enrolment in Canadian universities was essentially flat. Stagnant enrolments during the 1990s were partly a product of demographics, but they were also the result of repeated provincial cuts to university grants, which made institutions reluctant to admit more students. Part-time enrolment declined somewhat during the same period, following a period of increases in the

Table 1.1: Full-time Equivalent Enrolments by Sector and Province, 2024-25

	Universities	Colleges	Total
Newfoundland & Labrador	15,630	6,270	21,900
Prince Edward Island	5,256	2,922	8,178
Nova Scotia	44,085	10,550	54,634
New Brunswick	19,009	9,204	28,213
Québec	235,438	215,361	450,799
Ontario	541,856	349,220	891,076
Manitoba	42,045	17,676	59,721
Saskatchewan	38,252	13,860	52,112
Alberta	133,709	69,118	202,827
British Columbia	156,594	67,114	223,708
Territories	393	924	1,317
Canada	1,232,267	762,219	1,994,486

1980s when professions such as nursing and teaching began retroactively requiring practitioners to hold bachelor's degrees, which they mainly attained through part-time study.

However, from about the turn of the century, growth resumed such that by 2023-24, full-time enrolments were 90% higher than they were in 2000-01. Partly, this was due to demographic change (the number of secondary school graduates began

increasing sharply in the late 1990s), but it was partly also due to greater domestic demand for post-secondary education, and then, later, to increasing international student enrolment.

Two particular events in this period stand out and show up in Figure 1.2 below as distinct "jumps" in enrolments. The first was the Ontario government's decision to end the system of Ontario Academic Credits (in practice, a 13th



grade of high school) in 2002, thus creating a “double cohort” of entering students in Fall of that same year. To attenuate the stress on institutions, the province granted extra funding to enlarge its universities, not only to accommodate the one-time system growth, but to permanently expand capacity as well. The second was the decision of the provinces of Alberta and British Columbia to expand their university systems, in part by transforming some community colleges into universities.

However, growth in university enrolments this decade has not been evenly distributed. Demographic challenges have led to limited growth in Newfoundland and Labrador and New Brunswick, while Québec has seen an outright decline in enrolments. Further west, Ontario, Saskatchewan, Alberta, and British Columbia all experienced increases of 18-20% while in Prince Edward Island enrolments increased by an astonishing 38%, mainly due to international student enrolments.

Figure 1.4 shows changes in university enrolments by field of study. In the early 1990s, when total enrolment was declining due to reductions in the number of part-time students, all fields except Health and the Sciences also experienced enrolment decline. Starting at the end of the 1990s, nearly all fields of study began to grow at roughly similar rates. The exception was Education; fewer teachers were needed because of the falling birth rates during the late 1980s and early 1990s and universities adapted by limiting enrolments to teacher training programs. This trend of growing enrolment in most fields of study continued until 2010 or so, when enrolment in the Humanities began decreasing while most other fields continued to grow. Between 2009-10 and 2023-24, enrolment in the Humanities decreased by nearly a third, while Social Sciences and Business increased by 17% and 15%, respectively. Meanwhile, enrolments in health fields increased by 27%, Engineering by 48% and Science by 64%.

Figure 1.2: Full- and Part-Time Students in Canadian Universities, 1992-93 to 2024-25

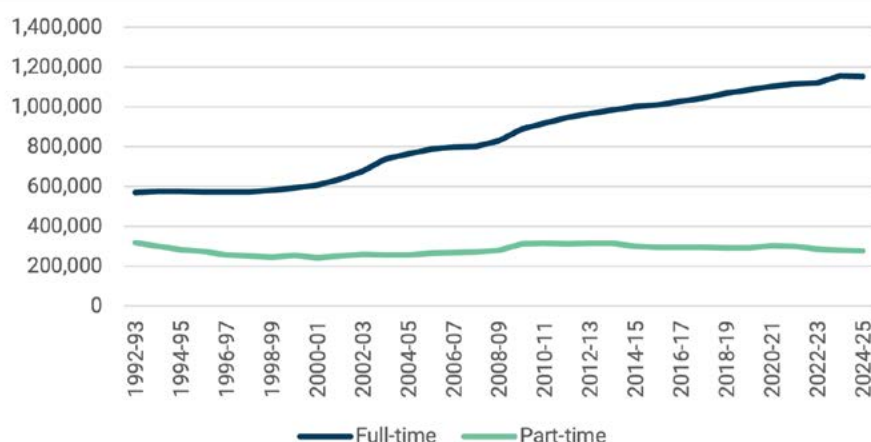


Figure 1.3: Change in FTE University Enrolments by Province, 2014-15 to 2024-25

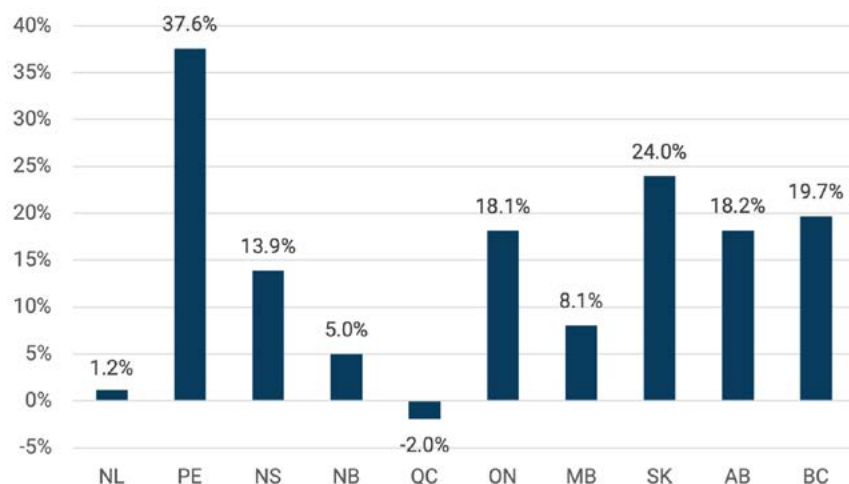


Figure 1.4: University Enrolments by Major Field of Study, 1992-93 to 2023-24

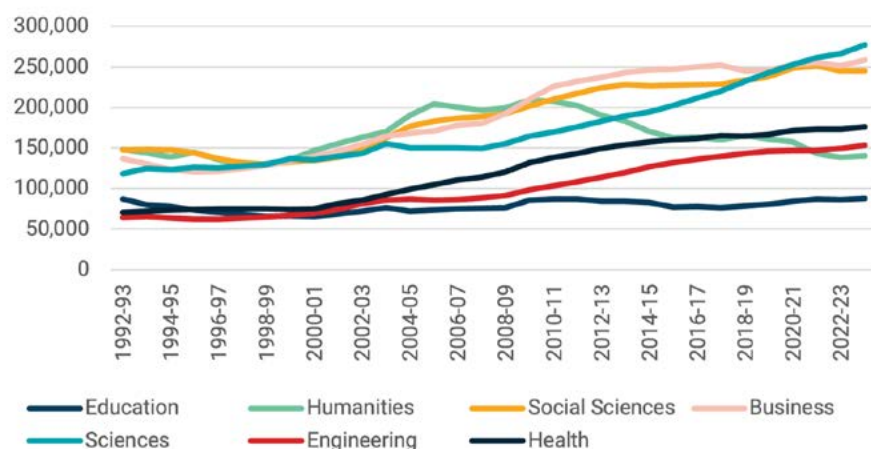
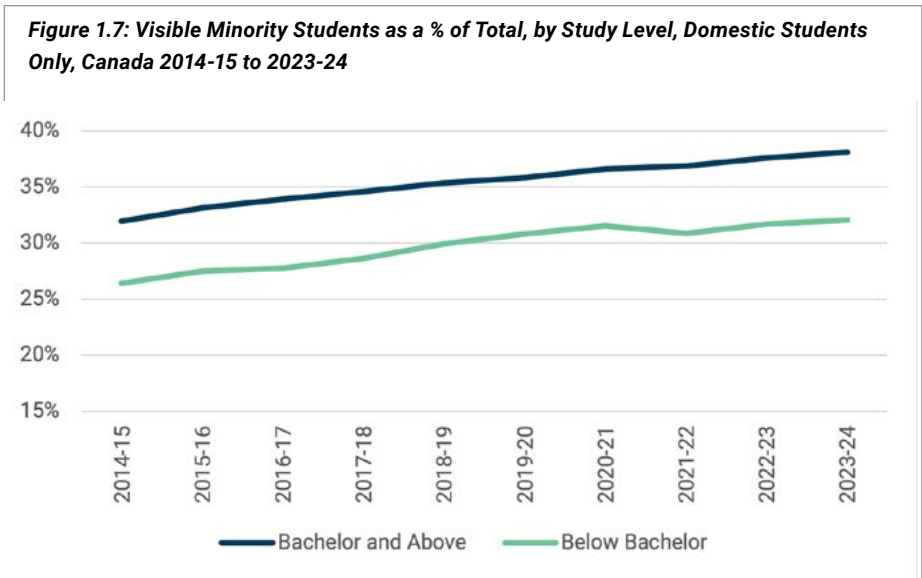
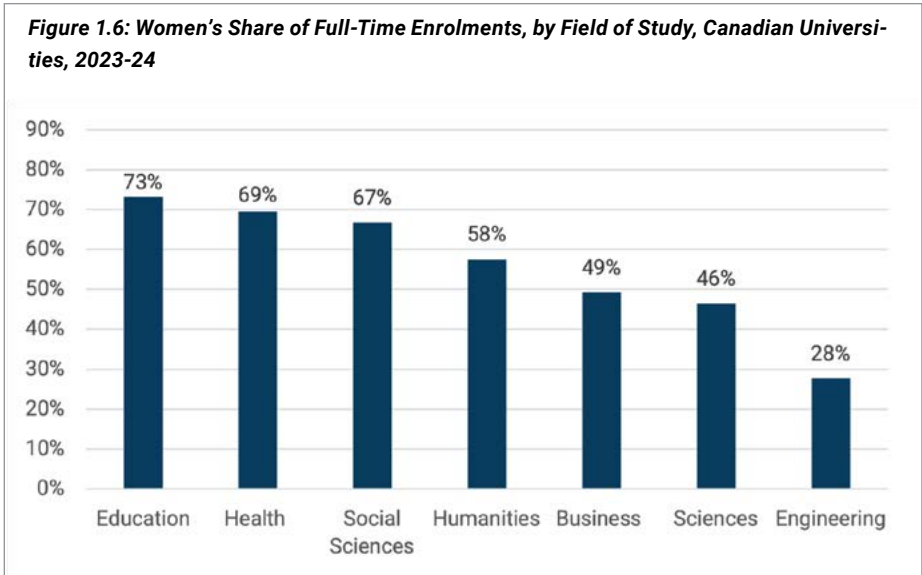
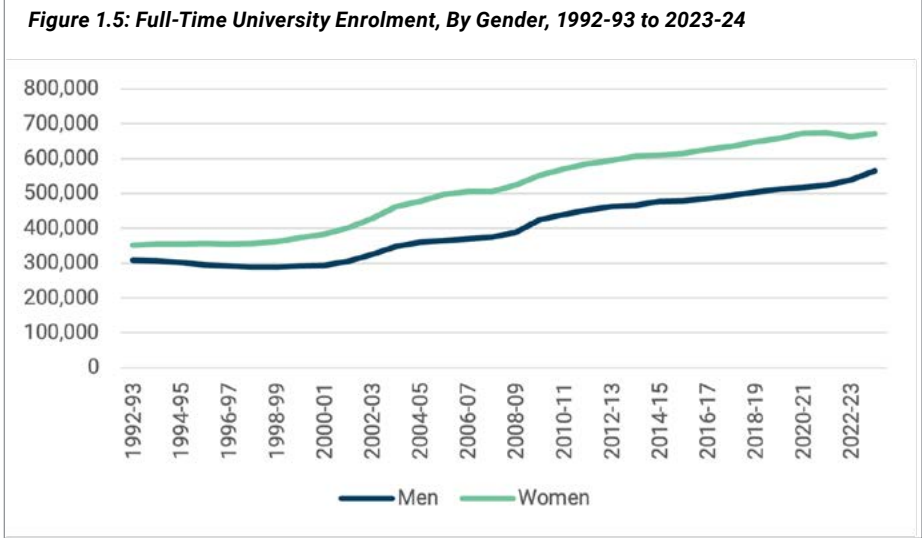


Figure 1.5 shows enrolment shifts by gender since 1992. As in most countries around the world, women outnumber men in universities in Canada and have done so for decades. In 1992-93, women made up 53% of the student body. By 2000, the student body was 57% women, a level that has been maintained until the time of COVID. Since that time, the female share of enrolments has fallen back to 54%. The internationalization of the student body seems to be the cause of this change, as international students tend to be disproportionately male.

The distribution of women across fields of study is uneven. In Health and Education, women make up between 70 and 75% of all full-time university enrolments. In what are usually called “arts” disciplines—that is, Social Sciences and Humanities—women usually make up a bit less than two-thirds of all enrolment. Business and the Sciences are more evenly split between men and women, while in Engineering, men account for close to three-quarters of all enrolment, a figure that has changed little over the past three decades. Figure 1.6 shows women’s share of full-time university enrolments by Field of Study in 2023-24.

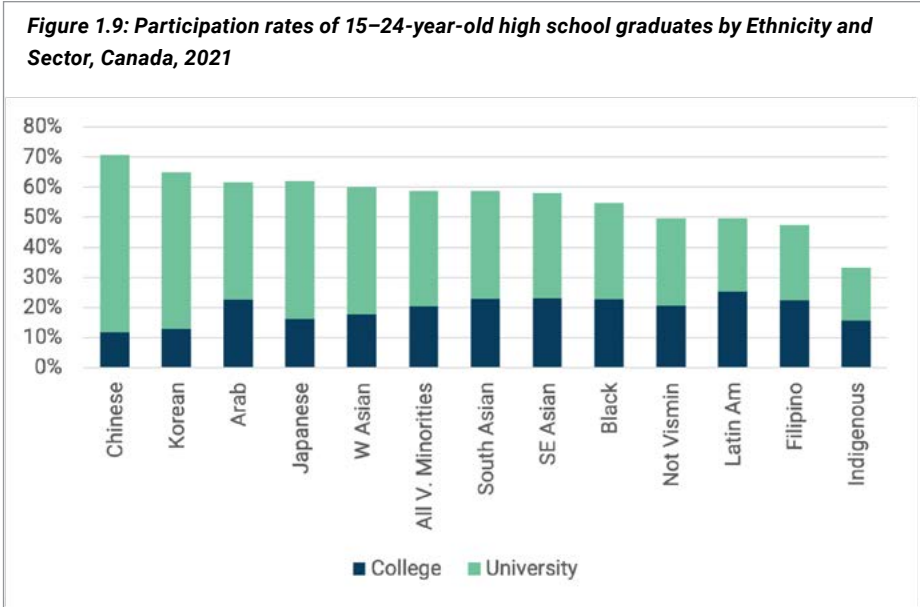
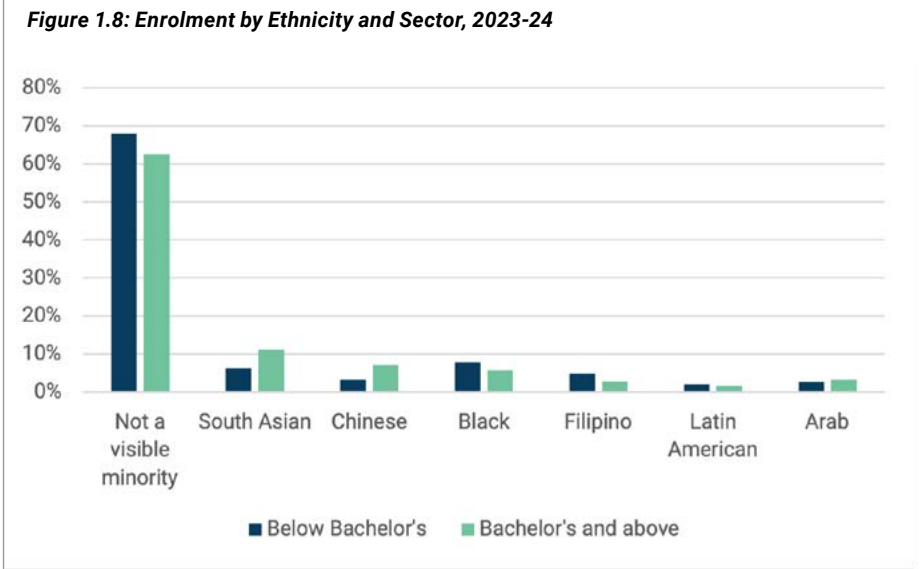
Recently, Statistics Canada has begun publishing statistics on the ethnic backgrounds of students using a data linkage between the Post-Secondary Student Information System (PSIS) and the last two censuses. Because of the census link, the data excludes students who were not in the country at the time of those surveys, (i.e. most international students). Using this method, data back to 2014-15 is now available, and is shown below in figure 1.7. Visible minority students make up roughly 38% of the domestic student population at universities and 32% in colleges, with both of these figures up about six percentage points in 2023-24 than they were eight years earlier. We cannot go further back in time than 2014 on this source, but earlier surveys done by the Canadian Undergraduate Survey Consortium suggest that in the university sector at least, the percentage of visible minority



students in 2001 was 14%, which suggests that things have changed quite radically in the past quarter-century. Since the population of Canada as a whole is 31% visible minority, and higher than that at younger age ranges, one can say that domestic visible minority students are probably slightly overrepresented at the university level and either equal to the population as a whole or slightly underrepresented in the college sector. However, if international student populations – which tend to be dominated by students from Asia – were also factored into the equation, these numbers would be much higher.

Statistics Canada’s data also allows us to consider in more detail the ethnic composition of both the university and college student populations, shown in Figure 1.8. Again, note that these totals are for domestic students only and do not include international students. What the data shows is that the destinations of various ethnic populations vary considerably. Young Canadians of Chinese and South Asian backgrounds make up a disproportionately large share of students at universities and a disproportionately small share of college students (11.2% vs 6.3% for South Asians, 7% vs 3.2% for Chinese), while the reverse is true for Filipino students (2.8% of university students, 4.8% of college ones) and to a lesser extent Black students as well (5.7% of university students and 7.8% of college ones) though in the latter case there are substantial differences between students of Caribbean and African origin, with the latter being much more destined for universities than the former.

Another way to consider data on students by ethnicity is to show the rates at which they participate in postsecondary education. Figure 1.9 shows the proportion of 15-24-year-old high-school graduates enrolled in each postsecondary sector, by ethnicity, according to the 2021 census. Youth of Chinese backgrounds had the highest levels of postsecondary participation at over 70%. Korean, Arab, Japanese and West Asian (e.g. Turkish and Iranian) youth all recorded participation



rates of 60% or higher. The lowest participation rates are for individuals with Indigenous identity at about 34% (and this is in some ways inflated compared to other groups because secondary school completion rates for this population are so low). The participation rate of non-visible minorities is on the low side, at 50%, which is 9% lower than for visible minorities as a whole. This makes Canada one of the very few countries in the world where visible minorities have higher rates of participation than non-visible minorities.

Census data also allows for an examination of participation rates among Indigenous peoples broken down further for First Nations, Métis and Inuit. As Figure 1.10 shows, the non-Indigenous population 15-24 years old with secondary school diplomas has an overall participation rate of about 54%, with a 60-40 split in favour of university enrolment. For Métis youth, the participation rate is 39%, with a smaller proportion in university. Among First Nations, it is 30%, equally split between the two sectors, whereas among Inuit populations, it is a very low 23% with a bias towards college enrolments that presumably reflects the lack of universities in Nunavut.

With respect to students with disabilities, our best source of data is the Canadian Undergraduate Survey Consortium. Between 2001 and 2013, the percentage of students reporting disabilities increased from 5 to 9%. It is impossible to determine whether this increase resulted from more students with disabilities accessing education, from reduced stigma in disclosing disabilities, or both. In 2016, the wording of this question changed to explicitly include mental health issues and the proportion of self-reporting students shot up to 22%. By 2025, students reporting disabilities had reached 33%, with 14% of students saying they were neurodivergent and another 17% saying they had mental health issues (respondents were able to indicate more than one disability).

With respect to participation by sexuality, the 2019 American College Health

Figure 1.10: Participation rates of 15–24-year-old high school graduates by Indigenous Status and Sector, Canada, 2021

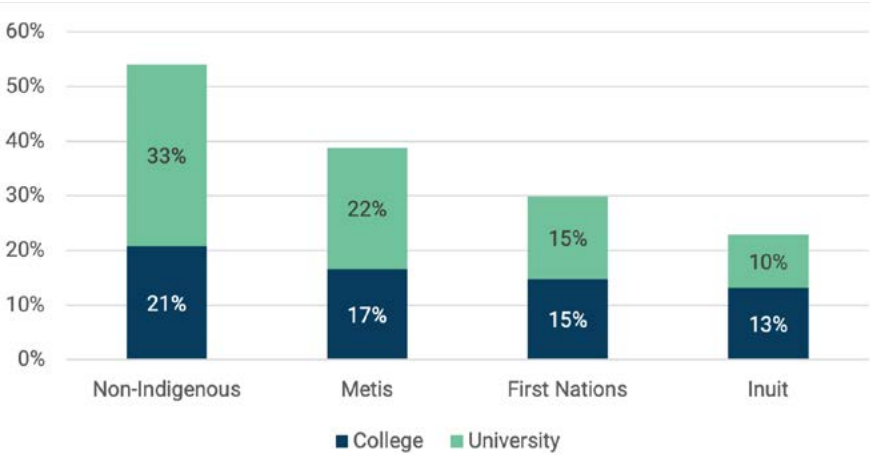
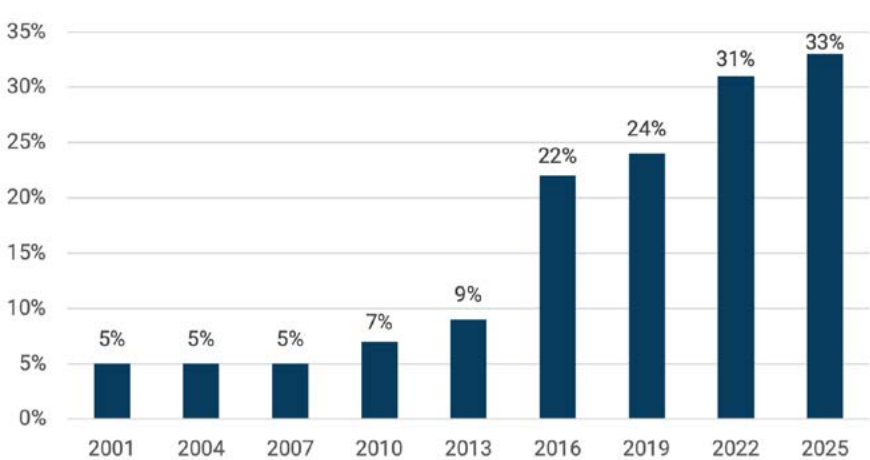


Figure 1.11: First-Year University Students Reporting Disability, Canada, 2001-2025



Association’s National College Health Assessment Survey, which was administered in 56 Canadian postsecondary institutions, reported that 83.2% of respondents declared themselves heterosexual, whereas 8.3% declared they were bisexual, and the remainder (8.5%) declared themselves lesbian, gay, asexual, pansexual, queer, questioning or some “other” sexual identity (the 2022 version of the survey, which had a much smaller sample of institutions, had the proportions at 73.4%, 12.4% and 14.2%, respectively). These results are substantially higher than Statistics Canada estimates of the general population, based on the Canada Community Health Survey, which suggest that 10.5% of the Canadian

population aged 15-24 is LGBTQ2S+. This may imply one or a combination of things: that LGBTQ2S+ youth are much more likely to attend universities and colleges, that some type of sample response bias may exist, or both.

Finally, a 2024 release from Statistics Canada estimates that 0.64% of domestic students in Canadian postsecondary institutions are transgender or non-binary. The percentage increases with the level of education: in college programs the figure is 0.6% while in doctoral programs it is 1.27%. It also varies by field of study, with Arts and Humanities at 1.34% whereas in Business and Administration it is 0.33%.

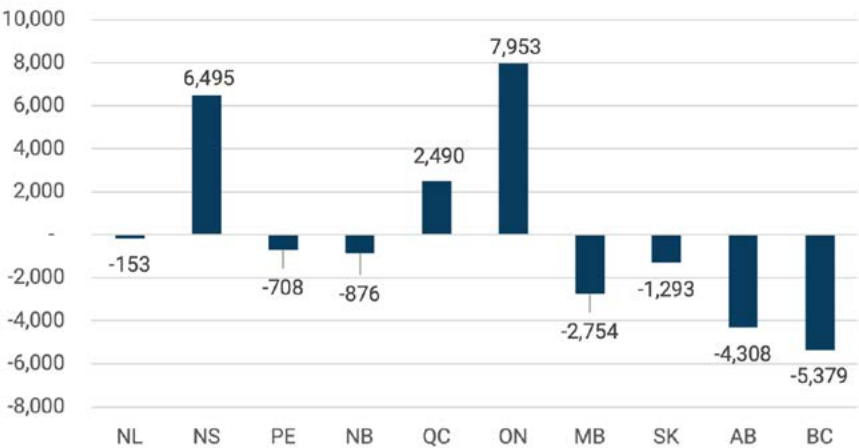
The proportion of Canadian university students who move from one province to another in order to study is relatively low, roughly 7.9%. This is one and a half percentage points higher than it was in the early 1990s, but also half a percentage point lower than prior to COVID. Generally speaking, movement between provinces is inversely correlated with the province's size. In the three Maritime provinces, over one in four domestic students is from another province (in Nova Scotia, much of this inflow is from Ontario; in New Brunswick and Prince Edward Island it tends to come from the other Maritime provinces). Conversely, in Ontario and Québec, the proportion of out-of-province students is closer to one in twenty.



Atrium of the Core Science Facility, Memorial University of Newfoundland, NL

Figure 1.12 shows the net inflow of domestic students (i.e., excluding international students) across all ten provinces. In absolute terms, the largest net recipient of students is Ontario, with 7,953 more students arriving than departing to other provinces; in relative terms, however, it is Nova Scotia that is by far the largest importer. Conversely, British Columbia is the largest net loser in terms of student numbers, sending nearly 19,150 students to other provinces (mainly Alberta and Ontario) while only attracting 13,750. In relative terms, Prince Edward Island is the largest net exporter of domestic students, losing a net 708 students to other provinces (mainly Nova Scotia).

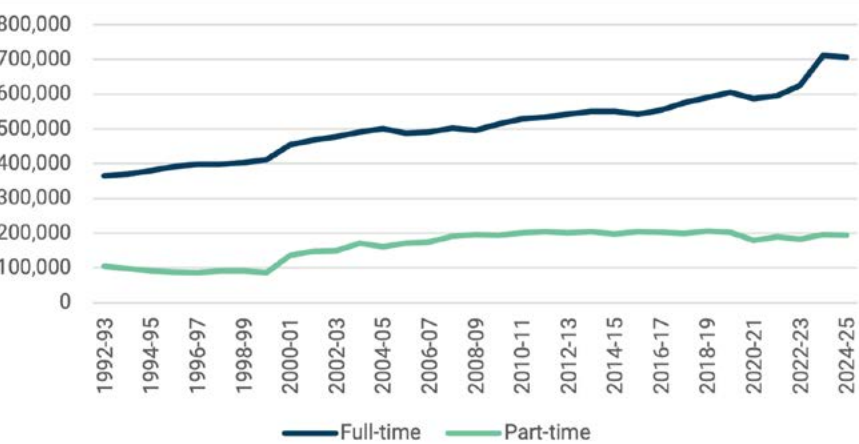
Figure 1.12: Net Inflows of Undergraduate Students from other Canadian provinces, by Province, 2023-24



1.3 ENROLMENT TRENDS IN COLLEGES

College enrolment has increased substantially over the past two decades, at rates roughly similar to those seen at universities. However, data collection on the college side is less reliable and Statistics Canada has changed the way it counts vocational education students, so some of the increases – particularly in the mid-to-late 2000s - may represent statistical artifacts rather than real change. Nevertheless, the growth on the college side is significant considering that many tens of thousands of college

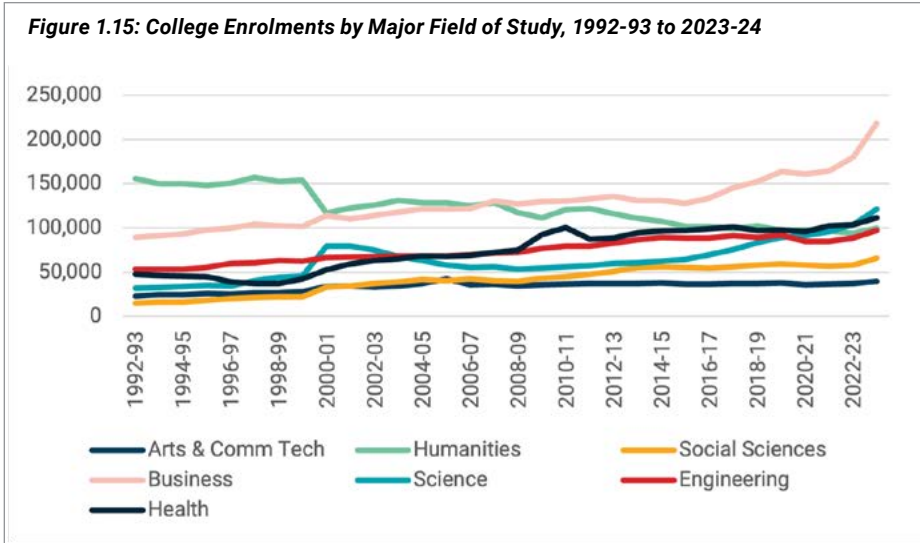
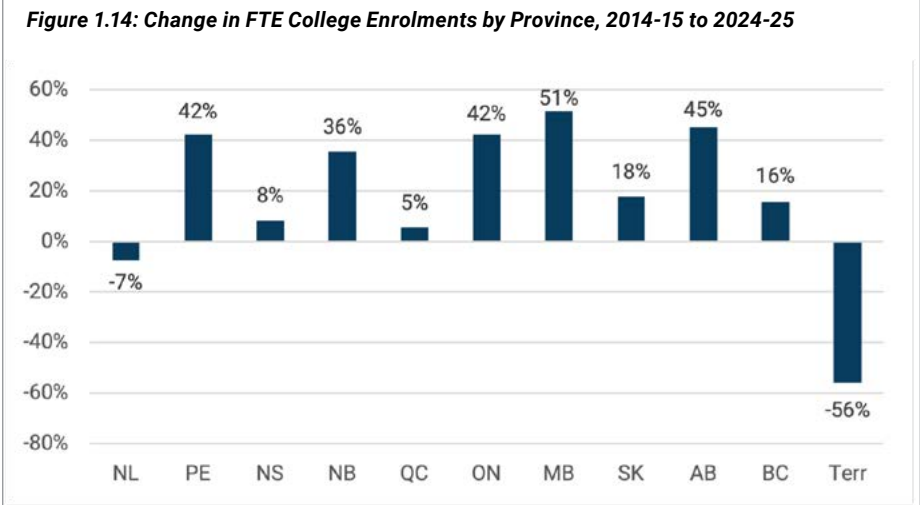
Figure 1.13: Full- and Part-Time College Enrolment, from 1992-93 to 2024-25



students were removed from the college count in Alberta and British Columbia when several institutions changed status from college to university. Increases in college enrolments since the days of the onset of the COVID pandemic are for the most part due to increases in international students.

Figure 1.14 shows changes in college enrolments by province over the past ten years. The steepest declines have been in the three territories, all of which have seen significant declines in enrolment. The culprit here seems to be the decline in part-time students, where numbers declined by roughly 90% between 2019-20 and 2020-21. This likely indicates a change in reporting practices rather than a real change in participation and also probably suggests that earlier figures were inflated. Numbers also declined in Newfoundland, mainly outside the Avalon Peninsula. However, more than offsetting these declines were increases of 30% or more in Prince Edward Island, New Brunswick, Ontario, Manitoba, and Alberta. For the most part, these increases have been due to international students rather than domestic ones. Elsewhere, rates of growth and decline have been more modest. Saskatchewan and British Columbia have seen gains of 18% and 16% respectively; meanwhile, numbers in Québec and Nova Scotia have been relatively stable.

Figure 1.15 shows enrolments in colleges by field of study. Enrolments in Business fields made up nearly 30% of



all enrolments in colleges in 2023-24, making them the largest single field of study at the college level by far. Growth in this field has been super-charged in

recent years due mainly to this being the field of choice for the international students (see below, figure 1.25) whose numbers were at their peak in 2024.



There has also been important long-term growth in the fields of engineering and health. One element of this figure that may surprise those habituated to thinking of colleges as offering mostly technically oriented programs is the large, albeit declining, proportion of enrolments in the humanities. That is due in no small part to the unique nature of Québec colleges: a significant proportion of students headed to university in that province (via the CEGEP system) are enrolled in CEGEP programs commonly considered to be part of the humanities.

Figure 1.16 shows college enrolments by gender. As in the university sector (see figure 1.5, above), women make up the majority of enrolments in the Canadian college sector. However, the pattern of change over time is slightly different in that, unlike the university sector, the proportion of college enrolments made up by women has stayed in a very narrow band of 53-55%.

As figure 1.17 shows, enrolments by field of study are more polarized in terms of gender in the college sector than they are in universities (see above, figure 1.6). Fully 80% of students in the fields of Health and Social Sciences are women, whereas in the fields of Engineering and Technology only 18% are women. However, Science, Humanities, Arts & Communications technology, and Business are all much closer to gender parity.

Polytechnics (see *What is a Polytechnic*, Appendix A) educate students at a variety of levels. In addition to “postsecondary non-tertiary” – what the United Nations Educational, Scientific and Cultural Organization (UNESCO) calls the International Standard Classification of Education (ISCED) Level 4 and “short-cycle tertiary” (ISCED Level 5), they also teach programs at the bachelor’s level or even above it. Because Polytechnics are not an official category of institution, we have no official count of students at these institutions as an independent category. However, based on their submissions to Statistics Canada, the 13 institutions

Figure 1.16: Full-Time College Enrolment, By Gender, 1992-93 to 2023-24

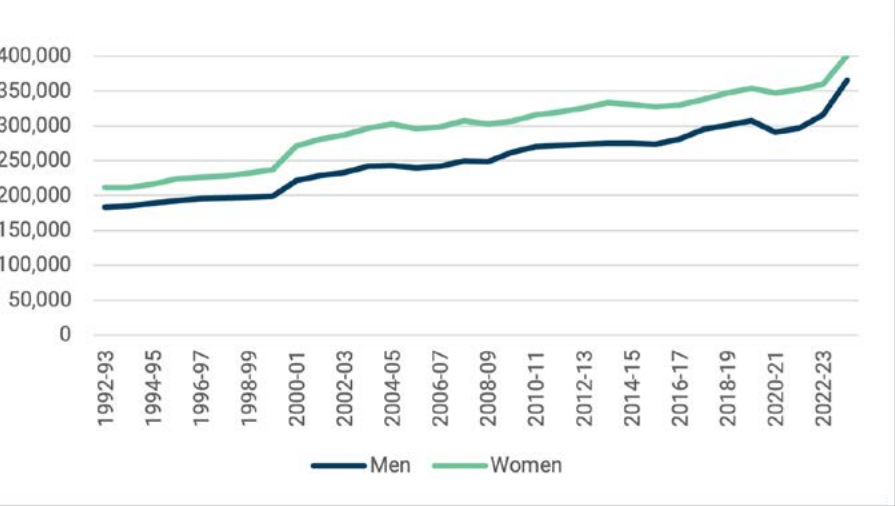


Figure 1.17: Full-Time Women's College Enrolment, by Field of Study, 2023-24

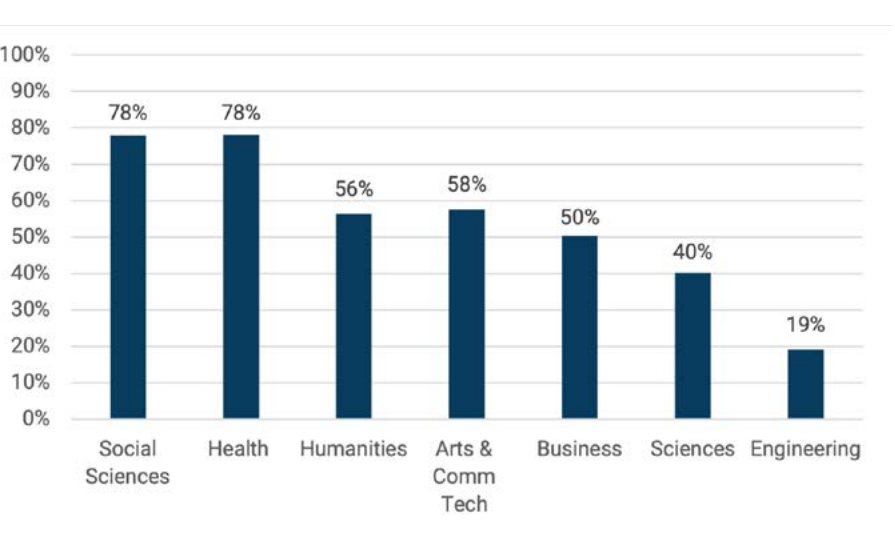
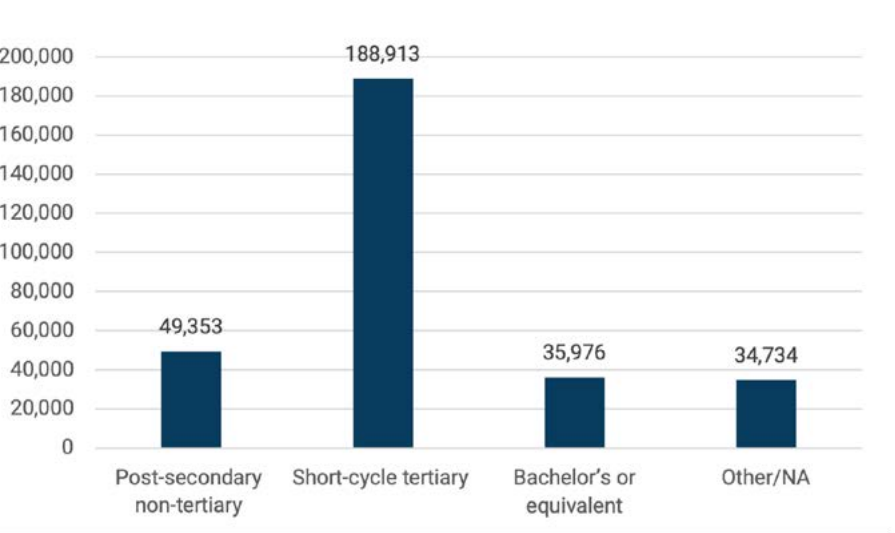


Figure 1.18: Polytechnic Enrolments by Level of Education, 2023-24



which are members of Polytechnics Canada reported a headcount enrolment of 274,200 postsecondary students plus approximately another 34,700 students who are not studying at a postsecondary level (classified as “upper-secondary” or “not applicable” by Statistics Canada) for a total of 308,900. Statistics Canada counts something like 95% of these as “college” students with only 5%, mainly from Kwantlen Polytechnic University in British Columbia, as “university” students.

As noted in Appendix A, Canada broadly has three kinds of college-level institutions. The first kind are the Collège d’enseignement général et professionnel (CEGEPs), which exist only in Québec, and provide both direct training for the labour market and a 2-year bridge between secondary school and university. Second are the Polytechnics described above, and third are the more traditional community colleges, which offer a variety of vocationally oriented non-degree programming, and remain the dominant form of college in the Atlantic as well as much of rural and small-town Canada from Ontario to the Pacific. The balance in enrolment between these three levels was fairly consistent until COVID, with colleges and polytechnics each making up about 35% of total enrolment and CEGEPs being the other 30%. Post-COVID, however, the inflow of international students went disproportionately to the traditional community colleges, which in 2023-24 increased their share of total college enrolments to over 40%.

1.4 PRIVATE POSTSECONDARY EDUCATION

While higher education in Canada is mostly provided through publicly funded institutions, particularly at the bachelor’s level, the country has a very large private sector as well (see Appendix A *Non-Standard Universities and Private Vocational Colleges*). Most of this sector consists of what are called Private Vocational Colleges, which mostly provide programs at the certificate level (that is, of a year’s length or shorter).

Figure 1.19: Polytechnics, CEGEPs & Colleges, Student Enrolment, 2009-10 to 2023-24

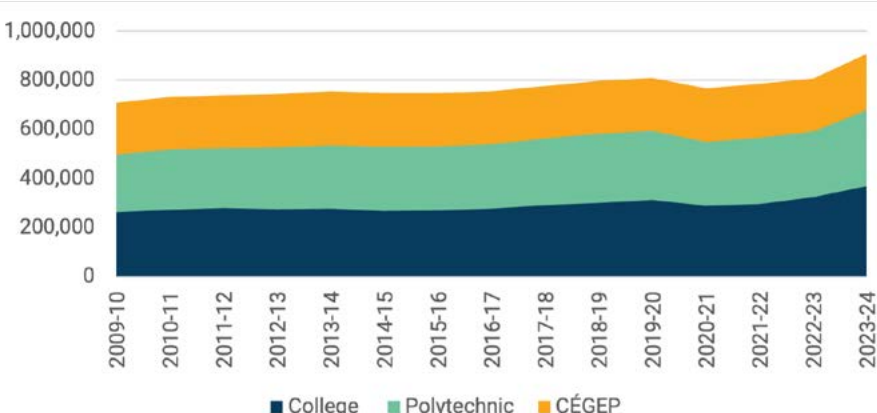
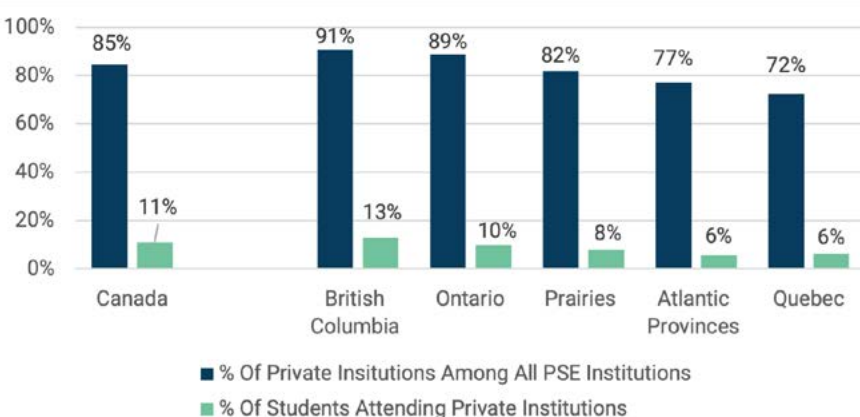


Figure 1.20: Percentage of Private PSE Institutions & Students Attending Private Institutions, Canada, Nationally and by Region, 2020



Statistics on these institutions and their students are hard to come by because they are not required to report information to Statistics Canada and, to the extent they provide data to provincial governments, the data tends not to be public. However, in the spring of 2023, Statistics Canada published some data on the sector using both the agency’s own Business Register and tax filing data. According to this new research, there are thousands of such institutions across the country; as figure 1.20 shows, roughly 85% of all postsecondary institutions in the country are private. However, these institutions are typically very small, such that these thousands of institutions have a collective enrolment that only makes up about 11% of the national student body. Prior to the

imposition of limits on post-graduate work visas, private institutions were almost as successful as public ones in attracting international students. Another recent Statistics Canada paper suggests that international students made up roughly 17% of the private school population in 2021.

1.5 APPRENTICESHIP ENROLMENTS

Apprentices are considered postsecondary learners, but they are not necessarily enrolled in postsecondary institutions. Their enrolment as apprentices merely means that they have a contract with an employer in which both sides agree the apprentice will follow a particular course

of learning and will periodically attend in-class training (see *Apprenticeships*, Appendix A). Apprentice numbers were very low in the mid-1990s, reflecting a roughly 15-year trough in commodity prices and a generally weak Canadian economy. However, from the late-90s onward, the national economy grew more rapidly, inducing an expansion of employment in construction necessitating the creation of many new apprentice positions. The decade-long run-up in commodity prices also created new demand for apprentices, particularly in Western Canada, in trades related to construction and resource extraction. The result was an increase in the number of apprentices, from 175,000 in 1997 to approximately 470,000 in 2013.

The 2013 peak in enrolments was followed by some weaker years for the natural resource sectors of the economy which drive overall apprentice enrolment to a significant degree. That said, the decline in apprentice numbers in the 10s was relatively small, falling by 19% to 392,000 from 2013 to 2020, though not all of this was due to changes in the resource sector; in fact, almost a quarter of this decline was due to Ontario eliminating a tax loophole that made it profitable to classify phone-centre workers as “user-support technician” apprentices. Since 2020, apprentice numbers have made a significant comeback, rising by 31% to an all-time-high of 498,783 in 2024. The growth in apprenticeship numbers has been fairly broad-based, but has been especially notable in fields like Heavy Equipment Mechanics, Millwrights, Welders, and Refrigeration/ Air conditioning mechanics.

Figure 1.21: Apprenticeship Enrolments, 1995 to 2024

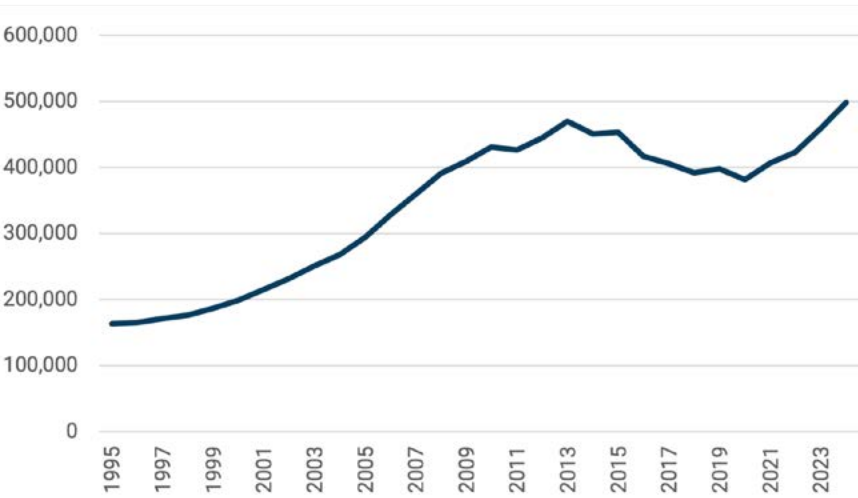


Table 1.2: Top Ten Major Trade Groups in Canada, 2013 vs 2023

2014		2024	
Electricians	70,851	Electricians	87,039
Carpenters	45,915	Plumbers	59,334
Plumbers	45,168	Carpenters	56,961
Automotive service	42,225	Automotive service	49,401
Welders	21,378	Other major trade groups	26,046
User support technicians	21,306	Food Service	21,840
Food Service	21,210	Interior finishing	21,153
Interior finishing	18,387	Heavy duty equipment mechanics	20,187
Hairstylists and estheticians	17,541	Millwrights	16,800
Other major trade groups	17,160	Welders	16,305

Table 1.2 shows how the top ten apprenticeship trades have changed in Canada over the past decade. The top four trades, which now make up over 50% of all apprenticeship registrations, have

stayed constant over the past decade (albeit with plumbers and carpenters exchanging spots): below that, the popularity of individual trades can fluctuate significantly.





Student Commons Building Exterior, Selkirk College, BC

1.6 INTERNATIONAL STUDENTS

Since about 2000, the number of international students at the postsecondary level in Canada has increased dramatically, from just under 40,000 in the late 1990s to an estimated 580,000 in 2023-24. This increase was at first gradual but became rapid from 2009 onwards. There are several reasons why institutions encouraged this growth: international students bring diversity to classrooms across the country and (marginally) because their presence burnishes institutions' standings in world rankings, which regard the presence of international students as an indicator of quality. However, the main reason is that international students pay much higher tuition fees than domestic students and are thus seen as a way to offset stagnant government funding. In 2024-25, international students made up 19% of all university enrolments and 28% of all college enrolments. Growth was most rapid in Ontario's college sector, where international student numbers more than quadrupled between 2016-17 and 2023-24.

As with the general student population, international students are not distributed equally across the country. At the university level, international students are a bigger part of the student body in the Atlantic provinces than they are

Figure 1.22: International Enrolments by Sector, Canada, 1992-93 to 2024-25

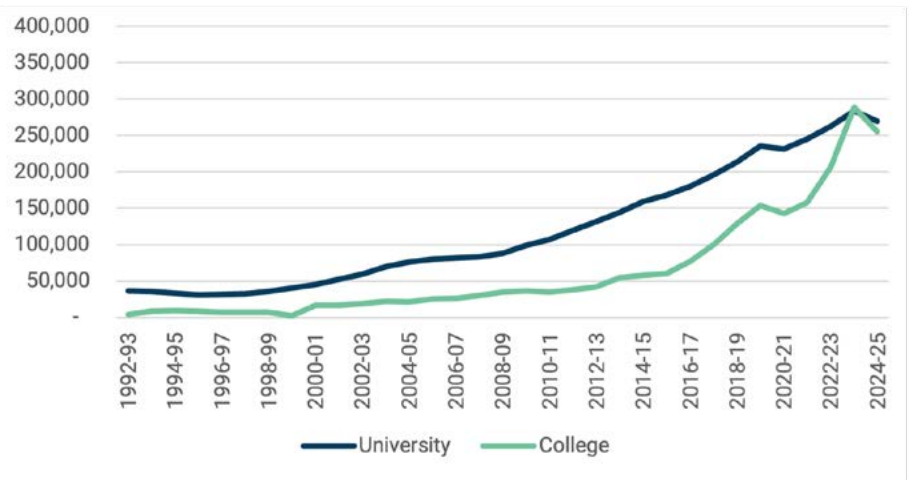
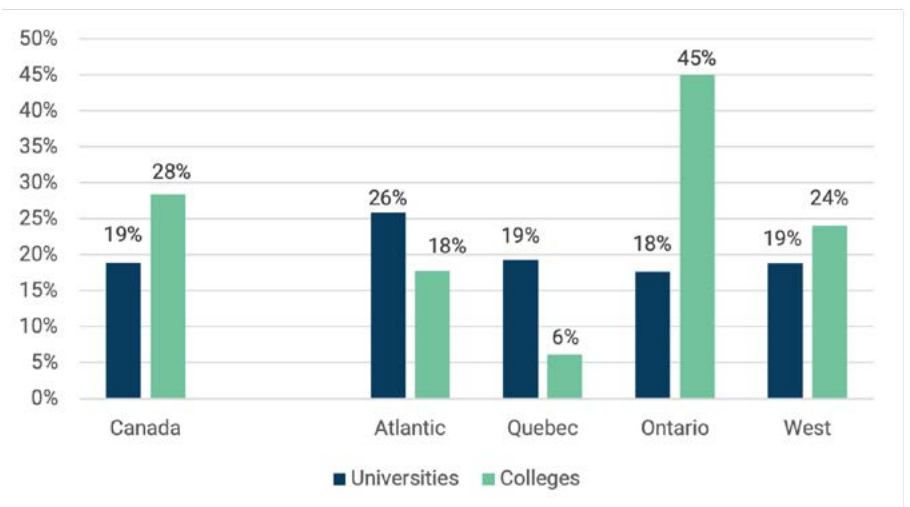


Figure 1.23: Full-Time Women's College Enrolment, by Field of Study, 2023-24



elsewhere. At the college level, it is the reverse, with international enrolments lower in the five eastern provinces but much higher west of there, especially in Ontario, which in 2023-24 accounted for just over three-quarters of all international college students in Canada. Figure 1.23 shows international students as a percentage of the student body by sector, both regionally and nationally.

Figures 1.24 and 1.25 show the distribution of international students by field of study for universities and colleges, respectively. As with domestic students, the Sciences and Business are the two most popular fields among international students at universities. Engineering is a substantially more popular field among international students than it is among domestic ones (17% of all international enrolments vs 9% of domestic ones), while Social Sciences, Humanities, Health and Education are less popular. That said, in absolute terms, international students have been a net positive for humanities enrolments; unlike domestic enrolment, international enrolment in Humanities has actually increased in the past decade. At the college level, it is a different story entirely; fifty percent of all students in this sector enrolled in Business programs.

Figure 1.24: Polytechnic Enrolments by Level of Education, 2023-24

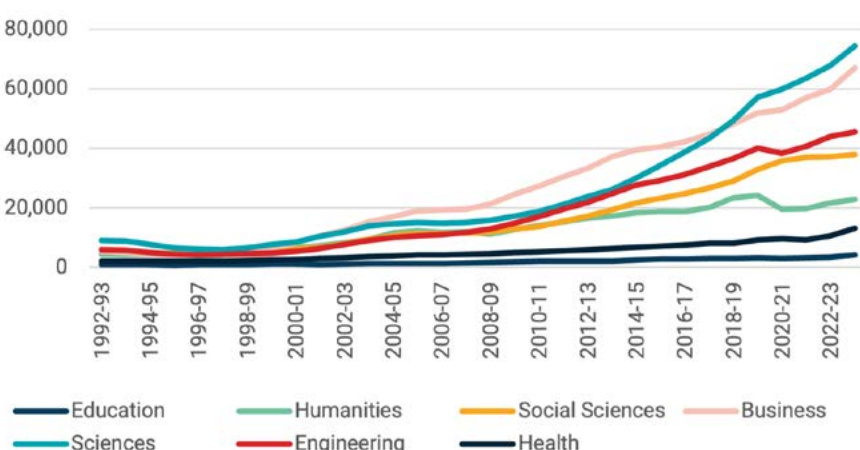
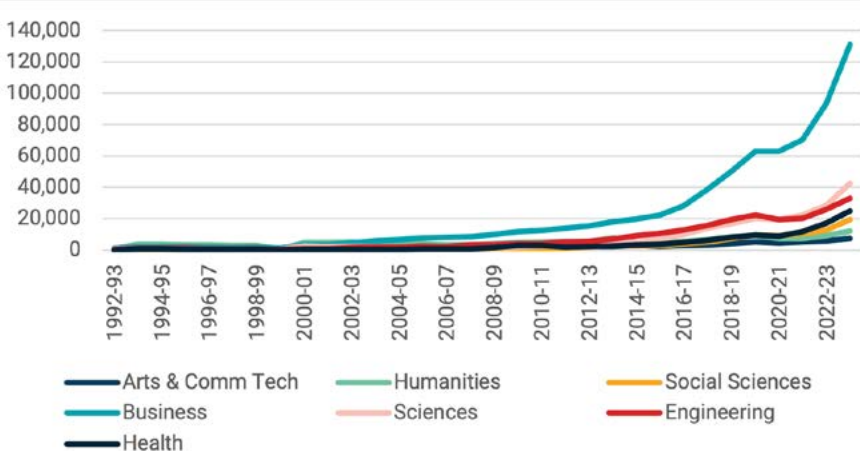


Figure 1.25: International Students, By Major Field of Study, Canadian Colleges, 1992-93 to 2023-24



One of the most important stories in Canadian postsecondary education over the past three years has been a rapid reduction from record high levels of international student enrolment and the financial consequences that this has had (see also Chapter 3 – *Income and Expenditure*). But, from the data presented in this chapter (specifically in figure 1.22), it appears that international student numbers have only decreased by about 10% from their peak. What is happening, exactly?

A major part of the answer is that Statistics Canada data on enrolment is never less than 15 months out of date – and at the time of writing this chapter, it is closer to 22. Thus, the most recent data we have from colleges and universities are snapshots from the fall of 2024, when the big enrolment slide was still only just starting.

A reader might still question why fall 2024 data seems not to reflect changes which were for the most part announced

at the start of 2024. To understand what is going on, consider separately how the change worked through both the college and university systems.

In universities, it was always the case that a clampdown on new student visas would take a while to affect total enrolment because undergraduate level degrees typically take four years to complete and so the full effect would not be felt until fall 2028. But also, remember that the class of 2024 was in effect

replacing the class of 2020 – that is, the initial COVID class, which itself was smaller than usual. The larger classes of 2021-2023 were still in school in fall 2024. Therefore, as long as the 2024 class was about the same size as the 2020 class, overall numbers would not start to drop until fall 2025 – a period for which Statistics Canada has yet to release data. The loss of students (and the associated loss of income) was always going to be a multi-year affair.

On the college side, the effects were felt much more quickly, because a high percentage of students were in 8 month post-degree programs. In theory, then, we should have been seeing a fall in enrolment almost immediately. However, some of the new rules did not fully take effect until May. Many colleges managed to admit one last cohort in the Spring before these rules took effect and so there were quite a lot of new international students still enrolled at the time of the fall Statistics Canada enrolment snapshot. Again, the result was that the international student numbers for 2024-25 still look fairly healthy.

A better way to understand the impact of the changes is to look not at the number of international students, but at the number of visas issued to international students intending to study at the post-secondary level (a figure that does not include any spouses or children of individuals coming here to study). This has the advantage of being far more up-to-date than enrolment statistics, because it is released monthly, and appears less than sixty days after the month-end. Figure 1.26 shows these numbers for the years 2015 through 2026, with the final year being an estimate based on the change seen between visa issuance in the first six months of this year versus the previous one. The data shows that even though the 2024 numbers were still relatively high, they have plunged back to COVID levels since then.

But even figure 1.26 to some degree understates the extent of the collapse in student numbers, because it counts all

Figure 1.26: Post-Secondary Student Visas Issued by Year, in thousands, Canada 2015-2026

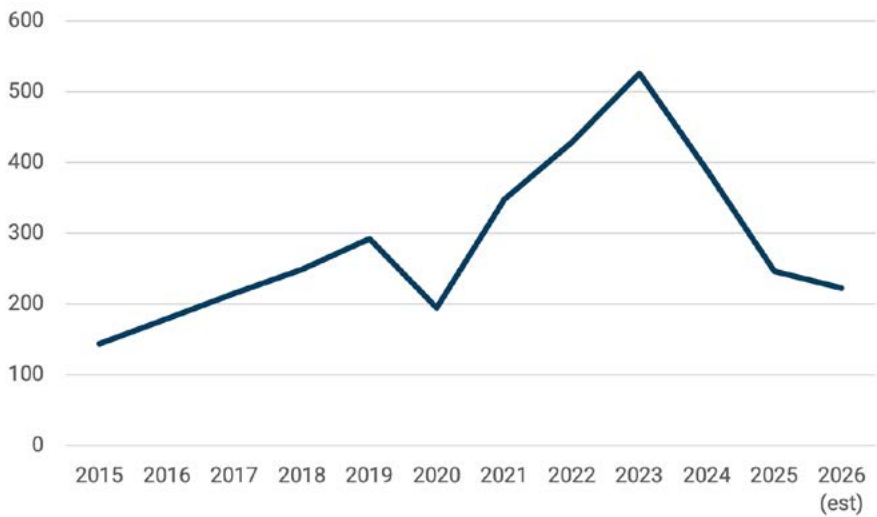
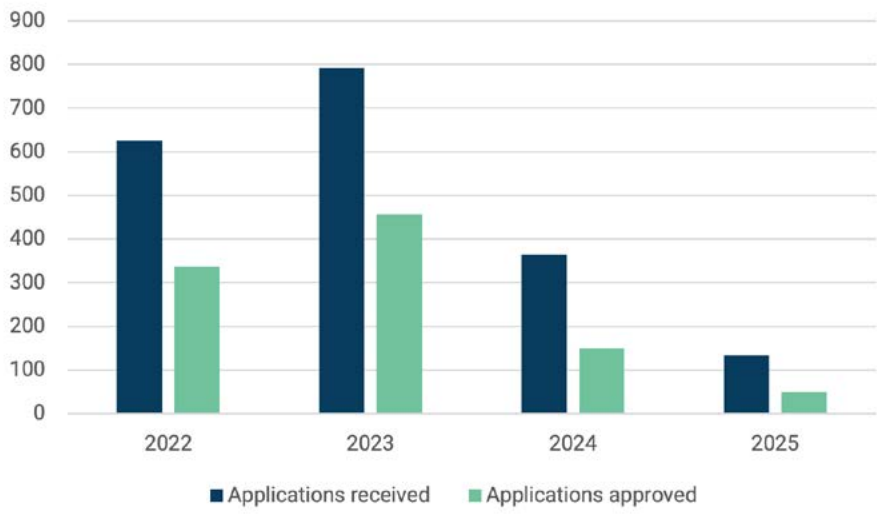


Figure 1.27: New Study Visa Applications And Approvals, in Thousands Canada, 2022-2025



student visas, including visa renewals for students who are already in the country. The Government of Canada does not regularly issue statistics on truly new student visas – that is, visas issued to individuals who have not previously held one. But early in 2026 the Auditor General, in a review of the government’s international student program, issued some quite stunning statistics on this, which are reproduced below in figure 1.27.

This second graph makes the scale of the disruption unmistakable. Between

2023 and 2025, new visa approvals fell by nearly 90%. If this pattern holds for three or four years, then the number of international students will decrease from around 580,000 in 2023-24 to around 60,000 by 2028-29, which would imply an overall enrolment drop of about 20%.

In short, exact figures on losses of international students are at present hard to come by thanks to Statistics Canada’s painfully slow data release process, but the direction of travel remains pretty clear.

1.7 CANADA IN INTERNATIONAL PERSPECTIVE

A perennial question about the postsecondary education system in Canada is how it fares in comparison to systems in other countries. This question is far harder to answer than one might think since national systems contain different types of institutions and offer degrees of various lengths. Most comparative questions can therefore only be answered imperfectly; nevertheless, some basic comparisons are possible.

One of the most often-asked questions when comparing different national systems concerns the size of the overall systems and the number of students they contain. Ideally, one would do this by looking at “net enrolment ratios,” which is a way of dividing the number of students in “typical” attendance in a tertiary education² program (e.g., domestic students enrolled in such programs between the ages of 18-21) by the total number of the country’s inhabitants in the same age range. This is difficult to do internationally because most countries do not make available sufficiently detailed data on the age distribution of their student body to allow for a net enrolment count. So, most international comparisons rely on the “Gross Enrolment Ratio,” which is total tertiary enrolment (in Canada, this includes all university programs and roughly half of those offered by colleges), divided by the number of people in the five-year age bracket following the typical end of secondary school (which for Canada is 18-22). Figure 1.28 shows this data for Canada and seven OECD comparator countries. Canada’s figure is 76%, which is slightly below the median among these countries.

Another way to look at participation in tertiary education is to look at the shares of population who are i) engaged in education ii) employed, or iii) Not

Figure 1.28: Gross Enrolment Ratios in Tertiary Education, Select OECD Countries, 2023 (or most recent year)

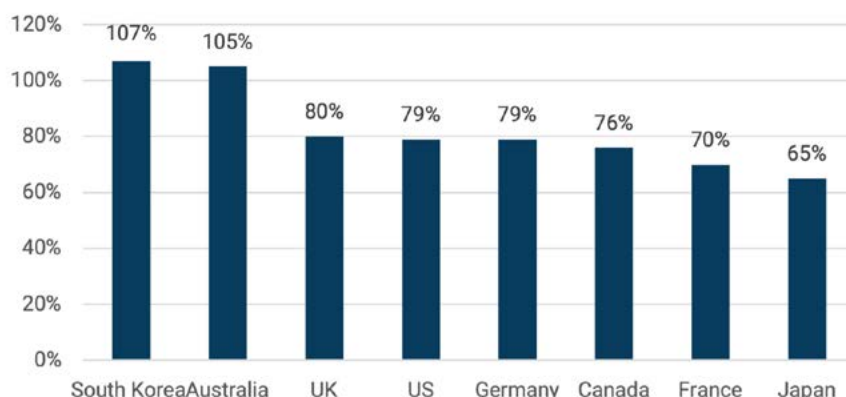
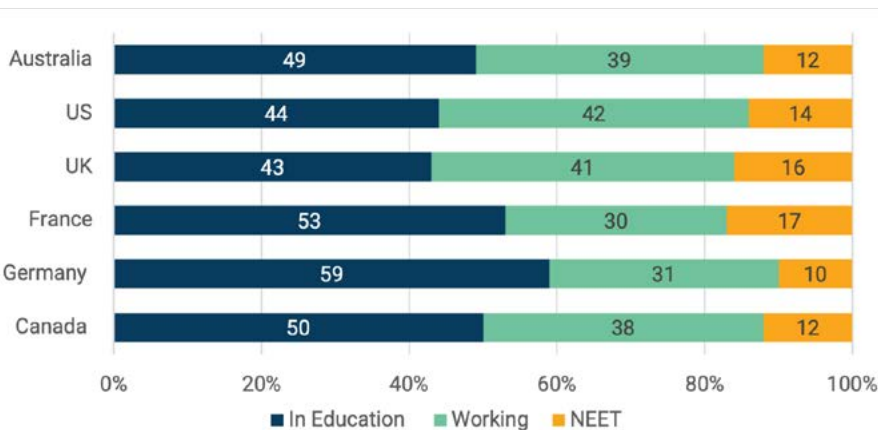


Figure 1.29: Proportions of Youth Aged 18-24 in School, in Employment or NEET, Select OECD Countries, 2024



Employed, in Education or in Training (NEET), a set of figures tracked by many but not all OECD countries. Figure 1.29 shows the percentages of youth aged 18-24 in education, employment or in NEET for Canada and four other G7 countries. Because the denominator of 18-24 covers seven age-years rather than just the four in figure 1.28, the percentages in education are significantly smaller in this comparison. Figure 1.29 shows a variety of patterns of education/employment/NEET across these countries, and there does not appear to be a stable pattern across these three

categories. In 2024 at least, Canada was among the better performers in this metric, with only 12% of individuals in this age group classified as NEET.

Another useful international comparison considers the distribution of students by subject area. Due to gaps in data, the best way to show this is to look at the distribution of graduating bachelor’s students rather than students enrolments, which is available from the OECD. As figure 1.30 shows, in 2024, Science graduates – that is, graduates from Bachelor’s programs in STEM and

² Tertiary education means ISCED level 5 and above, according to the United Nations Educational, Scientific and Cultural Organization’s classification system. Roughly half of all postsecondary students at Canadian colleges are considered to be in tertiary programs, while the remainder are considered “postsecondary non-tertiary”.

Health disciplines combined – ranged from 37% of the total in France to 59% in South Korea (Canada was in between at 45%). Arts and Social Sciences were most prominent in Japan, France and the United States; Business and Law were most prominent in France.

The final international comparison concerns apprenticeships. These are extraordinarily difficult to compare multilaterally because of the vast differences in how these programs are defined and delivered. Nevertheless, a comparison between Canada and Germany is instructive, mainly because of the way that Germany’s “dual system” of education is so often credited with German success in manufacturing.

Yet, a closer look at the patterns of apprenticeship registrations in the two countries suggests this credit may be misplaced. One of the distinguishing features of Canadian apprenticeships is the way they are focussed on very traditional trades, particularly the construction trades. As table 1.3 shows, eight out of the top ten trades in Canada – accounting for roughly 60% of all apprentices – are related to the construction or automotive industries (or what in Canada tend to be called the “skilled trades”). In contrast, over half of the top trades in Germany are in white-collar occupations, such as retail sales, industrial sales, office clerks, and medical assistants.

In another interesting contrast, Canada has approximately 105% more apprentice electricians than Germany, despite Germany’s considerably larger population. That said, apprenticeships in Germany last only half as long, so the number of people qualifying from their apprenticeships may be more or less the same. And, as figure 1.31 shows, apprenticeships in Germany are targeted at young people starting their careers, which is hardly the case in Canada, where the program is mostly aimed at individuals in their mid-20s to mid-30s.

3 US and France data is for 2023.

Figure 1.30: Distribution of Graduating Students by Field of Study, Select OECD Countries, 2024³

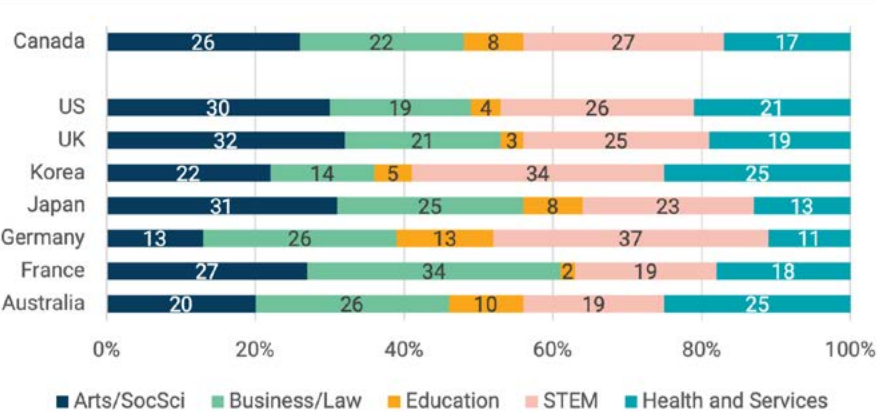
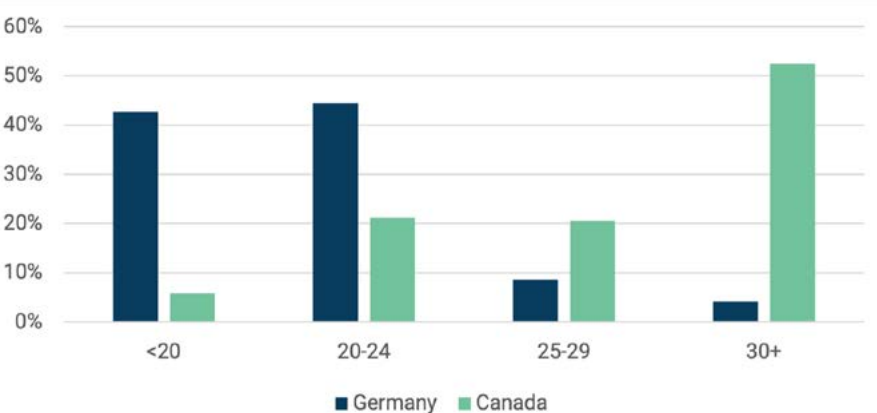


Table 1.3: Share of Apprentices by Occupational Grouping, Canada vs. Germany, 2023

Canada		Germany	
Electricians	87,039	Automotive Mechanics	67,488
Plumbers	59,334	Office Clerks	55,155
Carpenters	56,961	IT Specialists	48,495
Automotive service	49,401	Medical Assistants	43,977
Food Service	21,840	Electricians	42,975
Interior finishing	21,153	Industrial Sales	42,459
Heavy duty equipment mechanics	20,187	HVAC Mechanics	41,922
Millwrights	16,800	Retail Sales	40,500
Welders	16,305	Industrial Mechanics	35,367
Refrigeration and air conditioning mechanics	15,663	Retail Clerks	34,893

Figure 1.31: Age Distribution of Apprentices in Canada (2024) and Germany (2025)



CHAPTER TWO

Staff

02

KEY POINTS

- ▶ Academic staff numbers at Canadian universities have been increasing slowly since 2015, more or less keeping pace with the increase in student numbers for the first time since the 1990s.
 - ▶ Over two in five (43%) of tenured or tenure-track academic staff are women; roughly one in five (21%) have a racialized background.
 - ▶ The average age of full-time academic staff in universities has risen significantly over the past twenty years. In 2025, over a quarter of all full-time academic staff were over 60 years of age, while only 15% were under 40, and there were more professors aged 69 and up than there were under the age of 35.
 - ▶ On the college side, there is evidence that part-time academic staff make up an increasingly large proportion of all teaching staff, particularly since the international student boom began.
 - ▶ In total, colleges and universities across Canada employ nearly 450,000 people at any given time, or roughly 2% of the total labour force. Slightly less than half are permanent salaried staff, with the remainder being casual or hourly staff.
-

Staff

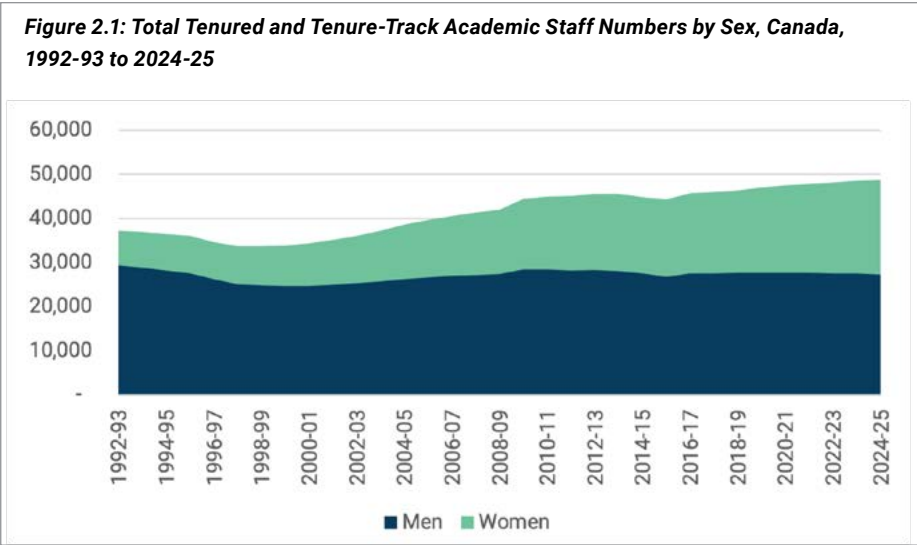
Hundreds of thousands of Canadians work in Canadian post-secondary institutions. But the quality of the information we have about them varies enormously. We have a very large amount of data about university-employed full-time tenured and tenure-track academic staff, and very little about anyone else. This chapter uses various data sources to, however imperfectly, paint the most detailed portrait possible of the sector’s workforce.

2.1 STAFF AT UNIVERSITIES

Figure 2.1 shows the number of “ranked” academic staff in Canada, meaning those who are tenured or on the tenure-track¹, by sex for the period 1992-93 to 2024-25 based on administrative data from Statistics Canada’s University and College Academic Staff System (UCASS). The number of such staff reached an all-time high of 48,723 in 2024-25, an increase of 45% from the nadir-point of 1998-99, when universities were in the midst of multi-year hiring-freezes due to budget cuts. Of interest here is the breakdown by sex: though Canada is nowhere near parity in its professoriate (the ratio is roughly 57-43 male-to-female), the growth in the number of female professors over the past two decades has been much stronger than for males. Since 2001-02, the number of female professors has more than doubled (+110%), while for males, it has increased by just nine percent. Still,

if current growth rates are maintained, gender parity across the professoriate will only be attained around 2040.

Statistics Canada’s Labour Force Survey (LFS) provides some additional data because it can capture individuals who indicate that teaching in universities is their main job, even if it is not permanent or full-time. It is, however, necessarily less accurate than UCASS precisely because it is a survey. Such LFS data from 1997 to the present is shown in figure 2.2. In this data source, “perma-



1 These academic staff, with only a few exceptions, hold the rank of assistant, associate, or full professor.

nent full-time” instructors in this graph should in theory be almost equivalent to tenure/tenure-track professors in 2.1, but this data shows a very different picture, with higher absolute levels and very little evidence of an uptick in hiring between 1998 and 2008. Of particular interest here is the fact that “permanent full-time” makes up about 70% of those who see university teaching as their primary job: this suggests that a majority of casual academic staff are probably fully employed in other fields and view teaching as a side-job.

While time series data from administrative data on faculty is available by sex (see figure 2.1), it is not available for other major equity categories. However, a 2022 Universities Canada report drew on census data to reveal that 20.9% of full-time academic staff belonged to a racially marginalized group (compared to 22.3% of the general population) and 1.3% identified as Indigenous (compared to 4.9% of the population). Data from the Labour Force Survey in 2023, shown in figure 2.3, suggests that among full-time academics, roughly 26% identify as “visible minority”, of which roughly 80% are in permanent positions, more or less the same as for the non-visible minority population.

The data from figure 2.1 includes counts of both teaching faculty and tenured

Figure 2.2: Number of Labour Force Survey Respondents Indicating their Primary Occupation is Teaching in a University, by Intensity and Security, Canada, in Thousands, 1997 to 2023

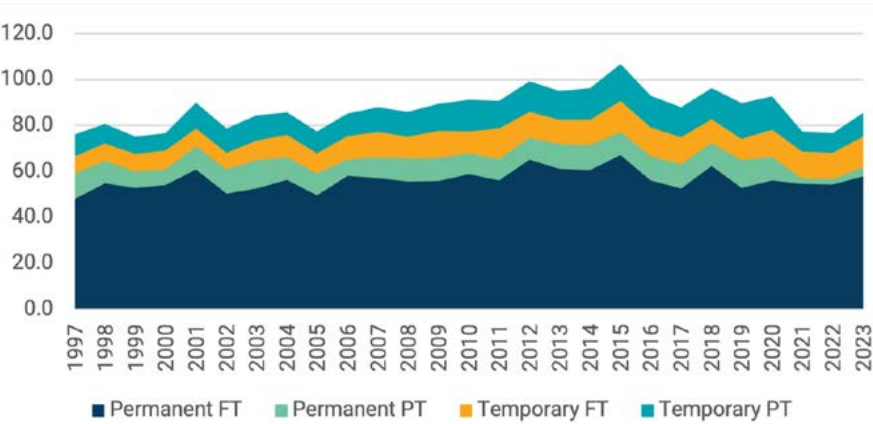
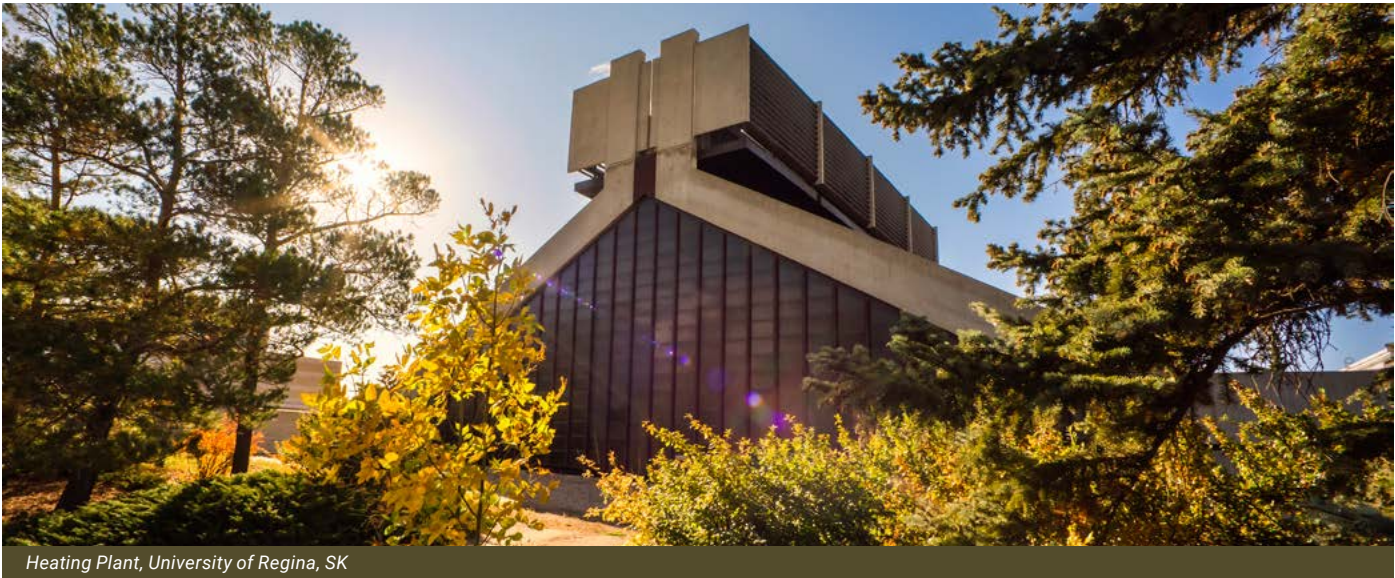
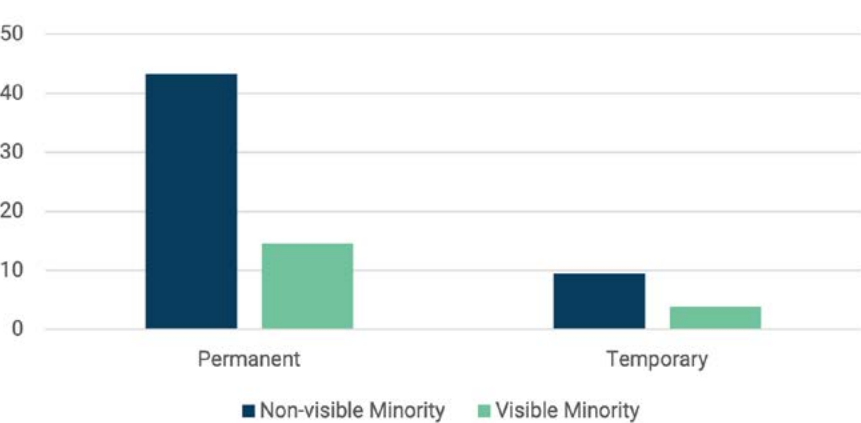
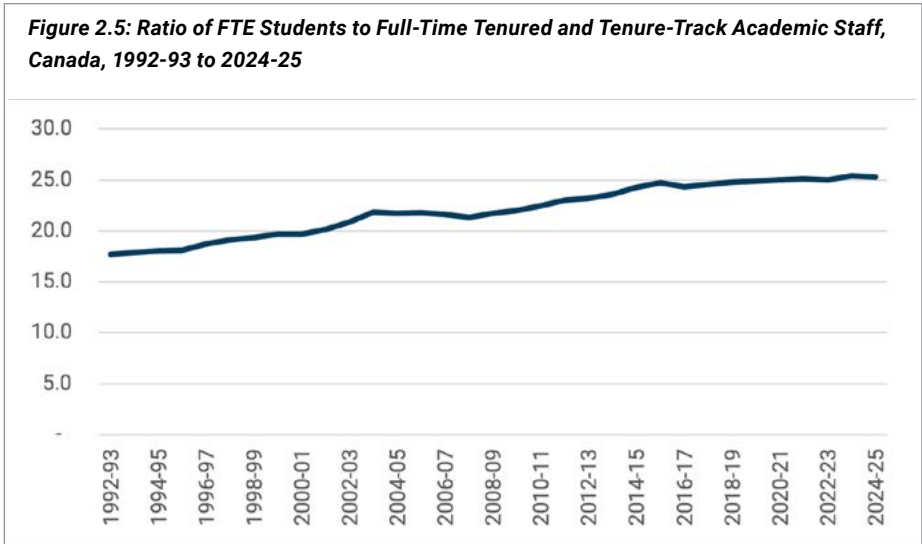
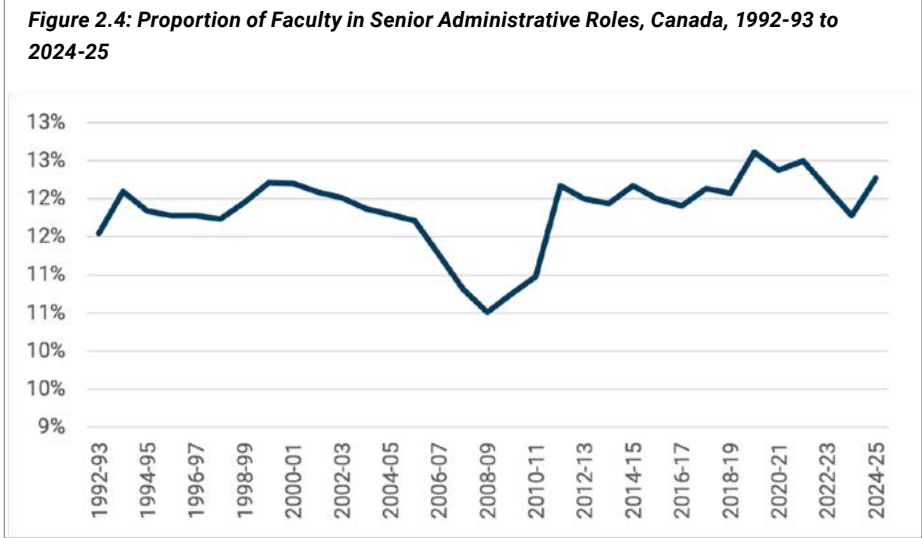


Figure 2.3: Full-Time University Professors by Visible Minority Status and Position Permanency, Canada, in Thousands, 2023



faculty who do not teach because they are in “Senior Administrative Roles”, a category that, according to Statistics Canada, includes both individuals in administration but also those in charge of laboratories. A common concern about higher education is that the number of “senior administrators” is consistently increasing, and as a result the increase in faculty numbers portrayed above might just be masking a growth in administration. Figure 2.4 indicates that this does not appear to be the case: the percentage of total staff in such positions has remained more or less constant over the past three decades at 12% (the exception being a few years around 2008, which roughly coincides with the period when six different former colleges in Alberta and British Columbia changed institutional status and became included in university statistics). Note however, that the data does not include senior administrators who are not permanent faculty members.

While the past two decades have seen a significant increase in faculty numbers, this increase has not kept pace with the large increase in student numbers shown in the previous chapter. The ratio of FTE university students to faculty has risen by nearly 50% over the past 25 years, from 17.7:1 to 25:1. This does not necessarily mean that class sizes have increased by 50%, as there are a number of confounding factors involved. Notably, sessional staff are used in ways which tend to reduce class size averages. Though quality data on the use of sessional staff is scarce, they appear to be taking on a



bigger proportion of classes than was the case twenty years ago, though growth in this area seems to have slowed if not reversed in the past ten. Also, at many institutions, faculty teaching loads as measured in classes taught per semester are lower than they were 20 years ago because research and publication expectations have increased. *Ceteris paribus*, this activity raises the average class size.



Shq'apthut, Vancouver Island University, BC

Figure 2.6 shows the distribution of professors by broad field of study. Social Sciences are by far the largest field in terms of the raw numbers, with just over 8,000 professors employed in this field; Health is next at 6,600. Education, Fine Arts and Agriculture are the three smallest fields. Figure 2.7 shows changes in student-faculty ratios from 1992-93 to 2023-24. Student-faculty ratios in Business and Education have always been high and have remained broadly consistent over time. Most other fields – including Humanities up until the mid-2000s – have seen rising student-faculty ratios (note though that this does not necessarily mean increasing class sizes, as sessional lecturers have sometimes been employed to reduce these). The two fields where student-faculty ratios are changing the fastest are Humanities, where ratios are falling because enrolments have dropped faster than faculty positions in the past fifteen years, and Health, which has seen student-faculty ratios more than double in the past three decades.

The abolition of mandatory retirement at the age of 65 in the early 2000s led to a significant increase in the average age of the professoriate over the past decade and a half. Whereas just 600 professors (less than 2% of all academic staff) were over 65 in 2000, by 2025 that figure had risen to nearly 6,000 (12%). Over a quarter of Canadian academic staff are over the age of 60, while only 15% are under the age of 40. Indeed, in 2025 for the first time the number of professors over the age of 69 surpassed the number who were under the age of 35. Figure 2.8 shows the change in the age composition of full-time academic staff since 2000.

The effects of an aging professoriate can be seen in part through changes in average staff pay levels. Because pay in academia is seniority-driven, a disproportionate amount of salary goes to older staff members who happen to hold higher ranks. 64% of professors over the age of 60 are full professors, compared with just 14% of those under the age of 50. Figure 2.9 compares salaries from 2024-25 with

Figure 2.6: Full-Time Tenured and Tenure Track Academic Staff by Broad Field of Study, Canada, 2023-24

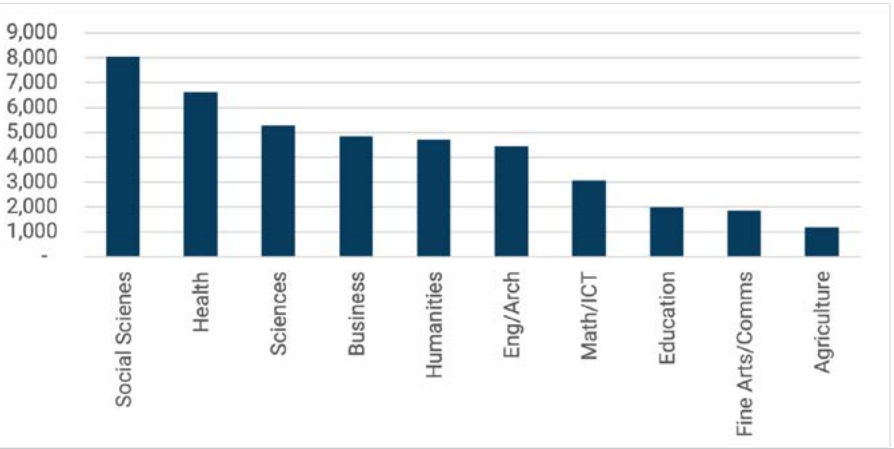


Figure 2.7: Ratio of Enrolled Students to Full-Time Tenure and Tenure-Track Academic Staff, by Broad Field of Study, Canada, 1992-93 to 2023-24

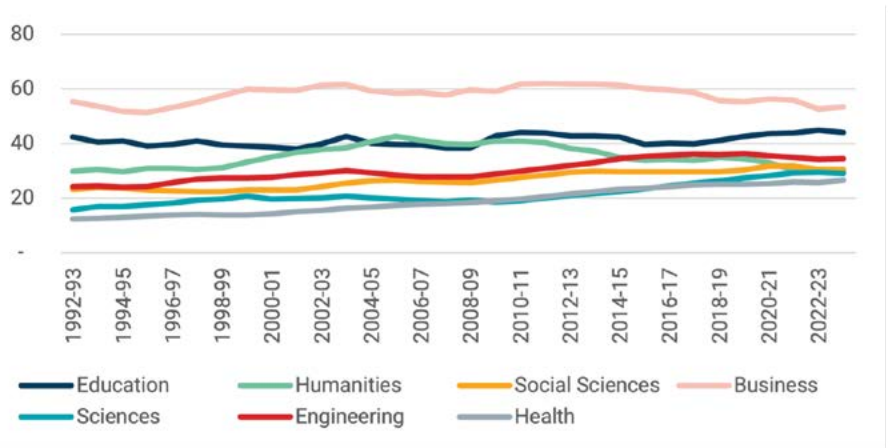
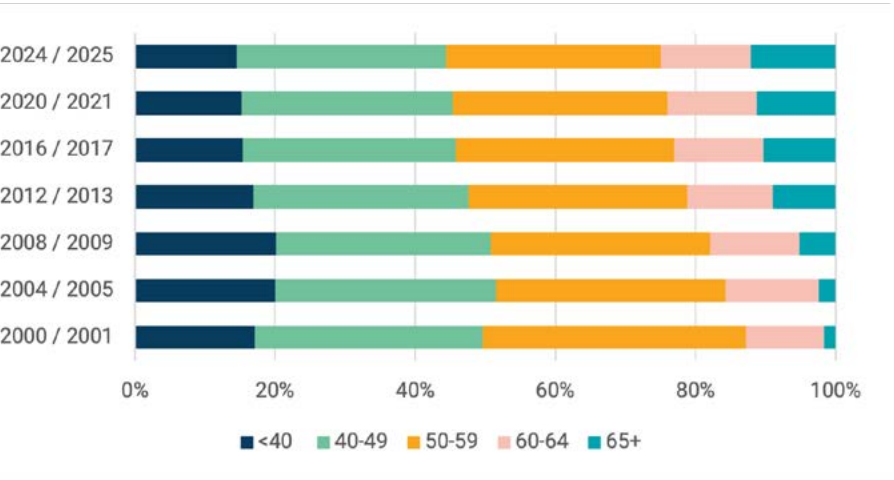


Figure 2.8: Age Composition of Tenured and Tenure-Track Staff, Canada, 2000 to 2025



those of 2001-02, 2009-10 and 2017-18. Over that 23-year period, average professorial salaries have increased by 25% overall, from \$131,994 to \$165,183 (in constant \$2024 dollars). However, much of that growth occurred prior to 2009: since 2017, average salaries have actually declined slightly in real terms mainly because pay did not keep pace with inflation during the COVID years.

There are no national or provincial counts available for non-academic support staff at Canadian universities using administrative data. There is, however, data from the national Survey of Employment, Payroll and Hours (SEPH), which permits at least an estimation of total university employment over time. It is much less accurate and more volatile than the data on academic staff because it comes from a survey of about 1% of all the employers in Canada and the institutions in the sample can vary from one point in time to another; many campuses and major employers are, by design, permanently part of the sample, but smaller institutions are not and are rotated in and out of the sample. What this survey tells us is that in an average month in 2023, 2024 and 2025, universities collectively employed about 330,000 people. A little over 60% of these employees were casual in the sense of being paid by the hour, while the remain-

Figure 2.9: Average Professorial Salary by Rank 2001-02 to 2024-25, Canada, in thousands of \$2024

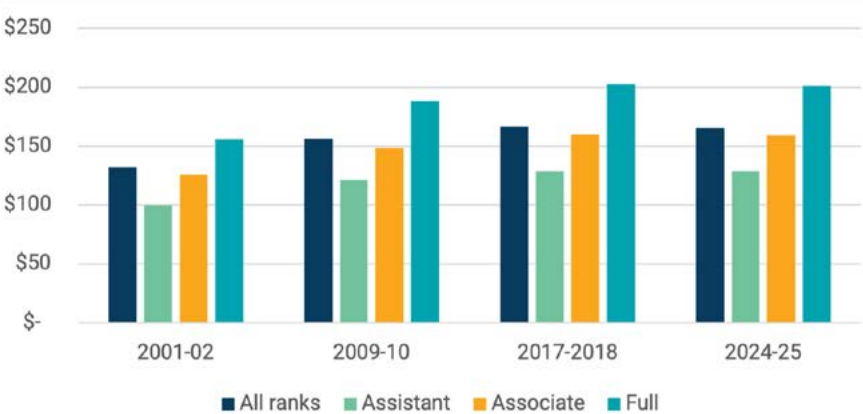
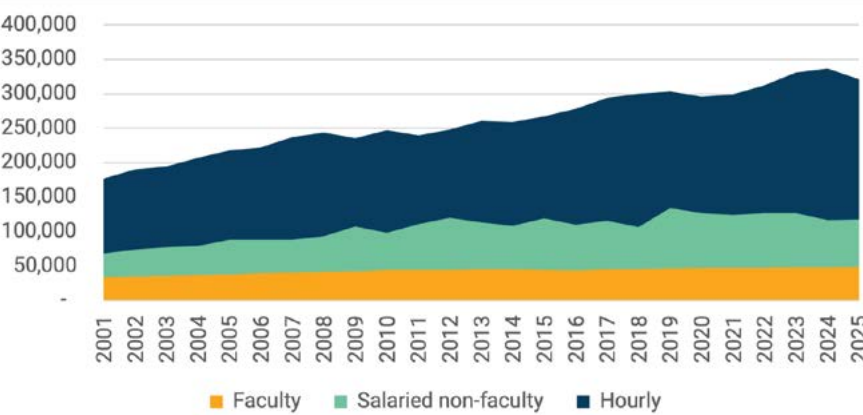


Figure 2.10: Total Staff by Status, Canadian Universities 2001-2025



Student Centre, Algoma University, ON

der were paid on a salaried basis. If we subtract the total number of ranked academics (from the University and College Academic Staff survey, shown above in figure 2.1.) from the estimate of salaried employees produced by the SEPH, it would seem that there are between 70,000 and 80,000 permanent non-academic employees at Canadian universities, a number which has decreased by about 10,000 in the past two years. Note that according to these two data sources, the number of permanent non-academic staff increased much more rapidly than the number of academic staff prior to 2024 – almost three times as quickly, in fact, although most of this growth happened prior to about 2011. Overall, total staff numbers since 2001 have risen almost exactly in line with student number growth

Another way of looking at changes in staff composition is to look at changes in total wage payouts to different groups. This does not tell us anything directly about staffing levels, but big changes in aggregate compensation would likely imply shifts in aggregate employment patterns as well. Using data from Statistics Canada's Financial Information of Universities and Colleges (FINUNI) survey, figure 2.11 tracks changes in the ratio of aggregate salary expenditures on full-time academics to those for non-academics (which is roughly equivalent to the "salaried non-faculty" and "hourly" groups indicated in figure 2.10 above, but excluding teaching assistants and sessional faculty). This data tells a slightly different picture: in the 1980s and 1990s, spending gradually shifted towards non-academic staff (the major drop around 1999 is due to a methodological change). Since the early 2000s, however, there has been very little change in the balance of spending on academic and non-academic salaries. This would seem to contradict the finding in 2.10 that one group is growing much faster than the other. However, the two stories could still be reconciled if average wage growth for non-academics was much slower than it was for academics. Note also that the

Figure 2.11: Ratio of Full-time Academic Salaries to Non-Academic Salaries, All Canadian Universities, 1979-80 to 2024-25

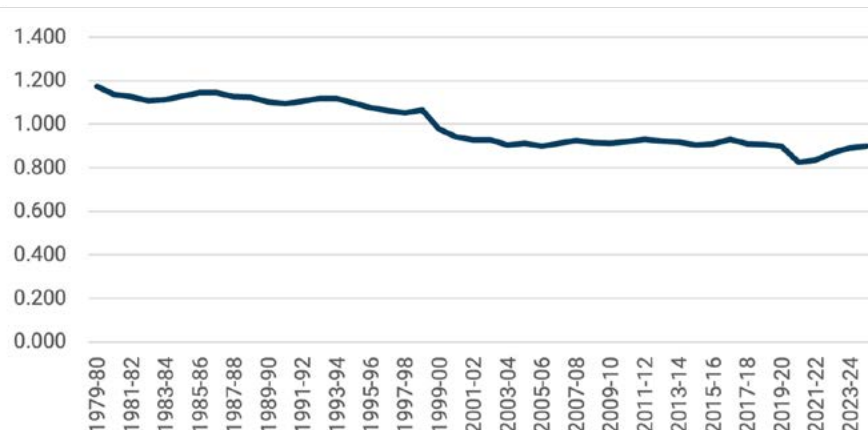
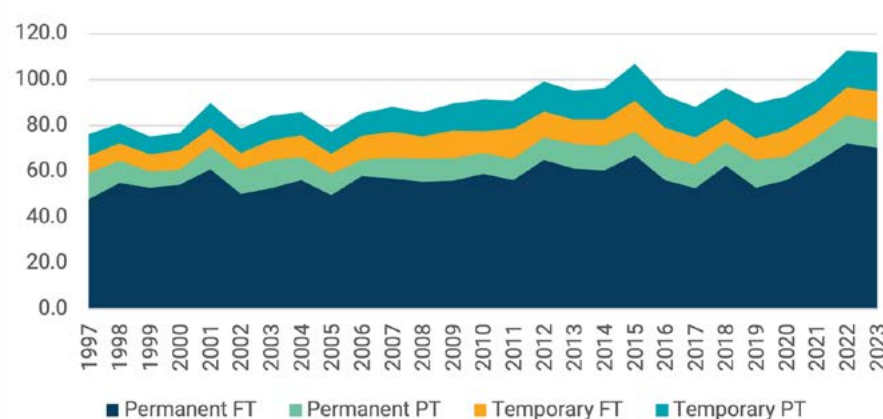


Figure 2.12: Number of Labour Force Survey Respondents Indicating their Primary Occupation is Teaching in a College, by Intensity and Security, Canada, in Thousands, 1997 to 2023



bump in salaried non-faculty hiring around 2019 shown in 2.10 coincides roughly with the dip in the proportion of all salaries going to academics in 2.11.

2.2 STAFF AT COLLEGES

Unlike the situation in universities, Statistics Canada does not collect administrative data about academic staff at colleges in Canada. Some information on this subject can however be gleaned from the Labour Force Survey. Due to small sample sizes (colleges employ less than 0.5% of the Canadian labour force), the data is choppy and subject to large margins of

error on a year-to-year basis. However, if a multi-year perspective is adopted, this data can be useful.

Figure 2.12, like figure 2.2 above, shows the results of survey data asking individuals to indicate their occupation (college teacher) and their job intensity and security. The data suggest that there are about 100,000 individuals who consider teaching at a college or other vocational institution to be their main occupational identity, and that of these, somewhere around 70,000 individuals are full-time permanent instructors, with the remainder having contracts that are part-time, temporary, or both. Note that the wording of the question in the Labour Force Survey

suggests that this data includes individuals teaching at private vocational colleges in addition to employees of public community colleges.

The picture becomes more complicated if one looks at the one province where good administrative data is available (in this case from Colleges Ontario). Figure 2.13 shows that there have been increases in the numbers of both full- and part-time instructors at Ontario colleges over the past decade. Contrary to the picture seen in figure 2.12, however, growth has been overwhelmingly more pronounced among part-timers than full-timers, particularly in the past couple of years. This does not necessarily mean one source of data or the other is incorrect; it might be the case that the increase in part-time staff is coming largely from individuals who have full-time jobs outside the college sector, which would not be picked up by the Labour Force Survey data. This would seem to be consistent with what we know about the way Ontario colleges were managed during the international student boom: that is, institutions avoided making long-term staff commitments given that the duration of the boom was always somewhat uncertain.

As with university instructors, data from the Labour Force Survey can be used to look at ethnicity data at a very high level for full-time instructors at colleges and other vocational institutions. Roughly 20% of permanent and 25% of temporary instructors at these institutions identified as visible minorities. This is a very slightly lower percentage than those who identify as such in universities.

With respect to total employment in colleges, there is no national administrative database, but as with universities, it is possible to use the SEPH to get a sense of trends. As with universities, SEPH data suggests that more than 50% of total employment is hourly (this may include any academic staff who are employed part-time). If the SEPH data shown in figure 2.15 is broadly correct, then it would suggest both that non-aca-

Figure 2.13: Full- and Part-Time Academic Staff, Ontario Colleges, 2006-07 to 2024-25

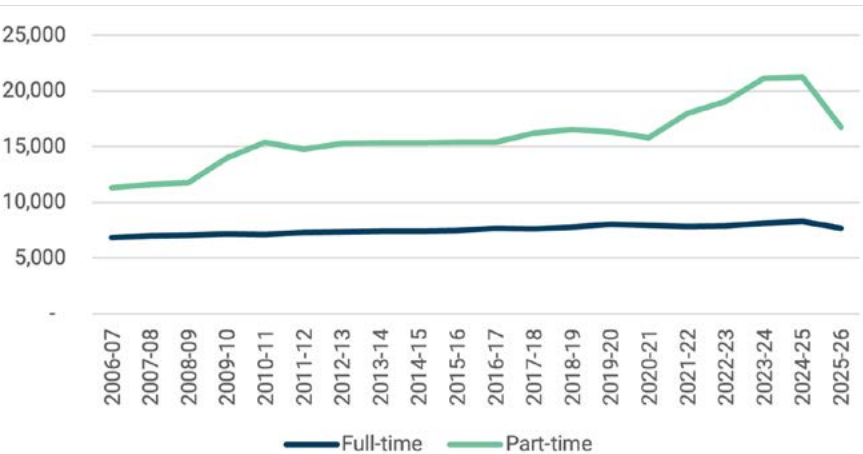


Figure 2.14: Full-Time College/Vocational Instructors by Visible Minority Status and Position Permanency, in Thousands, Canada, 2023

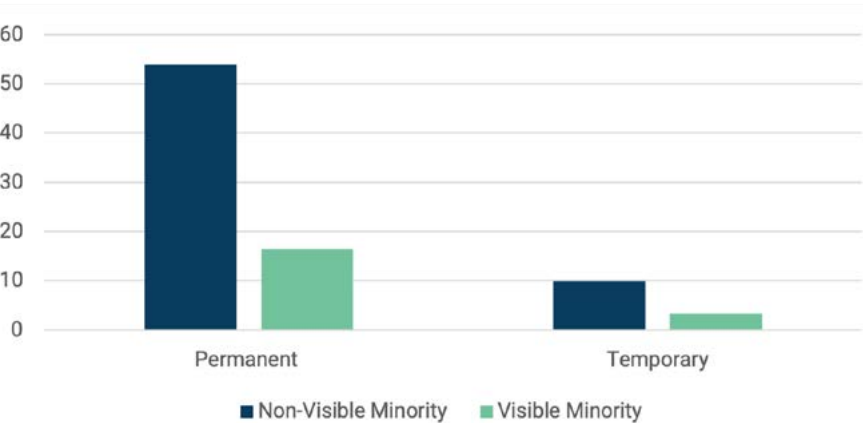
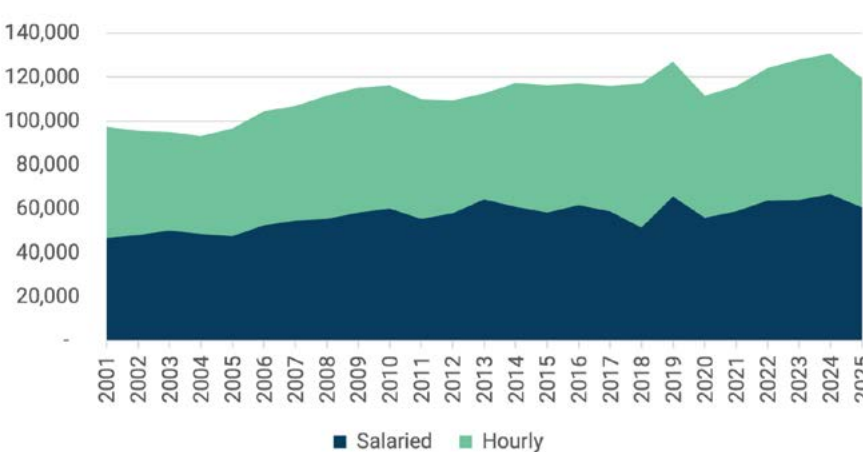
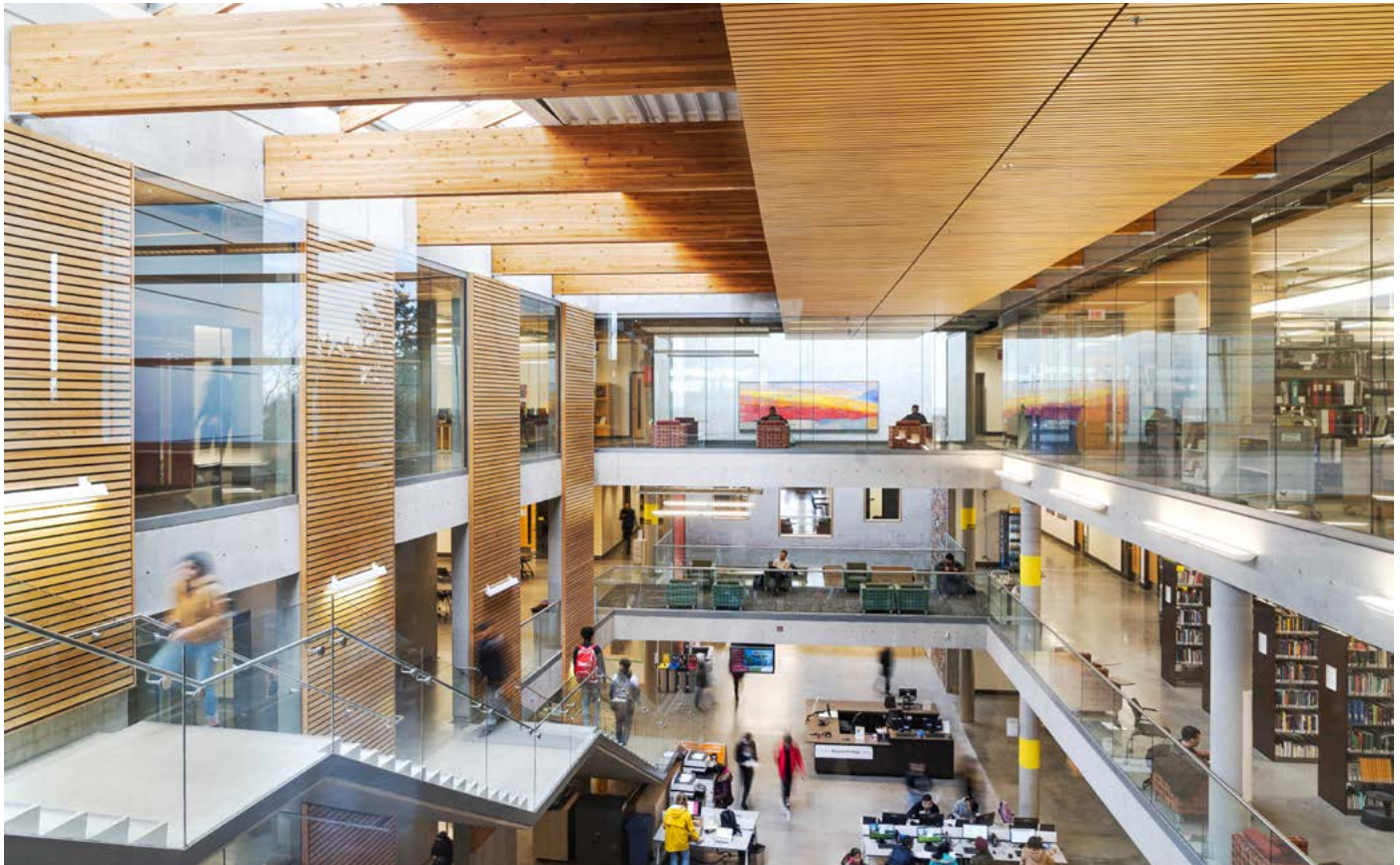


Figure 2.15: Total Staff by Status, Canadian Colleges 2001-2025



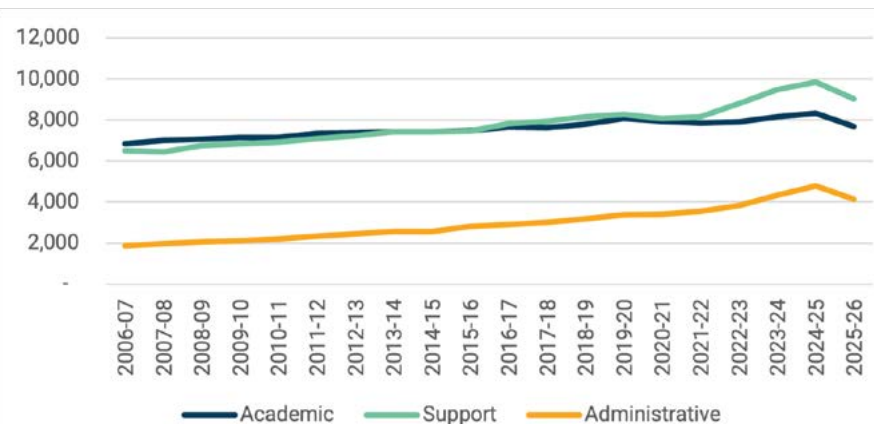


Surrey Campus, Kwantlen Polytechnic University, BC

demographic staff numbers are significantly lower in the college sector than in the university sector, even accounting for differences in enrolments, and that employment in the sector has been broadly stable over the past ten to fifteen years. However, this picture is not exactly congruent with the data from the Labour Force Survey shown in 2.12, above. In fact, if both were literally true, there would be almost no salaried employees at colleges except for those with teaching duties, which is evidently not the case. The true picture likely lies somewhere between the two estimates.

Finally, data from Colleges Ontario provides us with a slightly more disaggregated look at non-academic staff in the province which constitutes nearly 50% of the country's student population. Figure 2.16 allows us to look at not just academic staff number, but also to distinguish between "administrative" and "support" staff (a useful distinction between the group of white-collar

Figure 2.16: Full-time Academic, Support and Administrative Staff, Ontario Colleges, 2006-07 to 2024-25



administrators and managers and other employees). Here the data shows that the numbers of both full-time support staff and administrative staff have grown a bit more quickly than the number of full-time academic staff over the past ten years and in particular during the big international student boom of 2021-24.

In particular, administrative positions have grown from 12% to 21% of the total full-time workforce while academic staff have fallen from 45% to 36%. Data from subsequent years might show quite a change as 2025-26 saw large numbers of layoffs in the sector.

CHAPTER THREE

Institutional Income & Expenditures

03

KEY POINTS

- ▶ Total postsecondary education institutional income in Canada reached an all-time high of \$73.5 billion in 2024-25, an increase of 91% in real terms since 2001-02.
- ▶ Expenditures on PSE institutions amount to roughly 2.2% of Canada's Gross Domestic Product.
- ▶ Despite an increase in 2024-25 in real terms, institutional income from public sources remains about where it was at the time of the Great Recession; most of the growth has come from fee income, which has more than doubled since 2007-08.
- ▶ Over 90% of all new operating spending in Canadian higher education since 2008 has come from international tuition fees.
- ▶ Total funding for tertiary education in Canada is above the average for OECD countries.
- ▶ Expenditure patterns at both universities and colleges have tended to show very little variation over time, although some changes have been evident on the college side since the increase in international student numbers began in the period just prior to the onset of the COVID-19 pandemic.
- ▶ Expenditure patterns at both universities and colleges show little variation over time.

Institutional Income & Expenditures

The public postsecondary education sector is worth \$74-billion per year in Canada. That equals approximately 2.2% of the national economy. This chapter provides a portrait of how this significant sector of the national economy generates and spends its money.

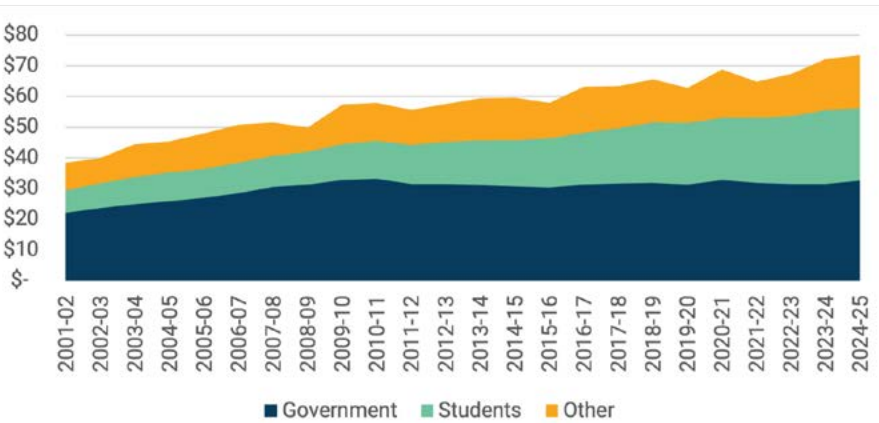
3.1 INCOME TRENDS FOR PSE INSTITUTIONS

From 2001-02 to 2023-24, overall institutional income increased by 91% in real terms, from \$38.4 billion to \$73.5 billion (all figures in constant \$2024). From 2001 until the financial crisis of 2008-09, revenue from all three main sources — government grants, student fees, and other self-generated income—increased at rates of about 5% per year after inflation. This changed after the 2008 financial crisis: since then, revenue from government sources has stagnated, while revenue from students has steadily increased, mainly due to increases in international student numbers. This remained true in 2024-25, despite the imposition of new student visa caps in early 2024, because the highest numbers of international student enrolments came in mid-2024 and were still paying tuition fees well into 2025. There has

almost certainly been a large drop in income since that time as the number of international students completing their studies in Canada exceeds the number of incoming international students under the new visa caps.

Institutional self-generated income tends to be a more volatile source of income than that from government or students, mainly because it consists to a considerable degree of returns on endowments, which in turn are largely

Figure 3.1: Total Income By Source, Public PSE Institutions, Canada, in Billions (\$2024), 2001-02 to 2024-25



dependent on the state of the equities market. In 2019-20, when a pandemic-related collapse in the equity market occurred just before the end of the fiscal year in March 2020, endowment gains were low or negative. Similarly, 2021-22 saw a contraction of nearly \$4 billion in institutional income from these sources, part of a \$6 billion year-on-year decline in total real income that was also driven by higher levels of inflation. This contraction represented the biggest single-year drop in Canadian history for institutional income. Conversely, 2020-21 was the best year this century for endowment returns, since the market was bouncing back from temporary lows at the start of the year. 2024-25 was the second-best year in Canadian history for investment and endowment returns and was a major reason why that year was the best on record for institutional income.

Institutional income from government sources increased somewhat in 2024-25, but it remains very slightly lower than its all-time high in 2011-12. From the early 1950s onwards governments provided the majority of institutional funding, but by 2016 the amount of institutional revenue from non-government sources surpassed income from government ones. In 2024-25, just 44.3% of total institutional income came from the federal and provincial governments. As figure 3.1 makes clear, this decline is more the result of increased non-government funding than it is because of reduced government funding.

Over the past twenty years or so, institutions have become gradually more reliant on tuition fees as a source of income. Since 2007-08, tuition fee income has more than doubled—from \$10.2 billion to \$24 billion—in inflation-adjusted dollars at Canadian universities and colleges. However, as figure 3.2 shows, this is not primarily due to increases in domestic tuition fees; rather it is due to the vast inflow of international students over the past decade. Since 2007-08, aggregate institutional revenue from domestic tuition fees has increased by 23%

(though it is down 13% since its peak in 2018-19), whereas revenue from international fees has increased by 554% through to 2023-24 before falling slightly in 2024-25 due to the initial effects of the cap on international student visas. Effectively, international student fees have accounted for close to 90% of all increased operating spending since about 2010. This income source will likely decline significantly from 2025 onwards due to policy actions at the federal level to reduce international student numbers.

Overall, Canada’s higher education system is among the world’s better-funded. In 2023, public and private expenditures on tertiary institutions amounted to 2.2% of gross domestic product. This was not

quite as high as the 2.3% recorded in the United States, but it remained substantially higher than most peer countries in the OECD. As figure 3.3 also shows, the mix of public and private funding in Canada, as in Korea, occupies a kind of midpoint on the funding continuum between the more privately-funded higher education systems of Japan and the rest of the anglophone countries on the one hand and the more highly government-funded Western European systems on the other.

Within Canada, detailed data on university income (see figure 3.4) are available back to the late 1970s. The pattern of revenue growth is somewhat cyclical. There was an increase in income from all sources during the 1980s, followed by nearly a

Figure 3.2: Total Fee Income by Source, Public PSE Institutions, Canada, in Billions (\$2024), 2007-08 to 2024-25

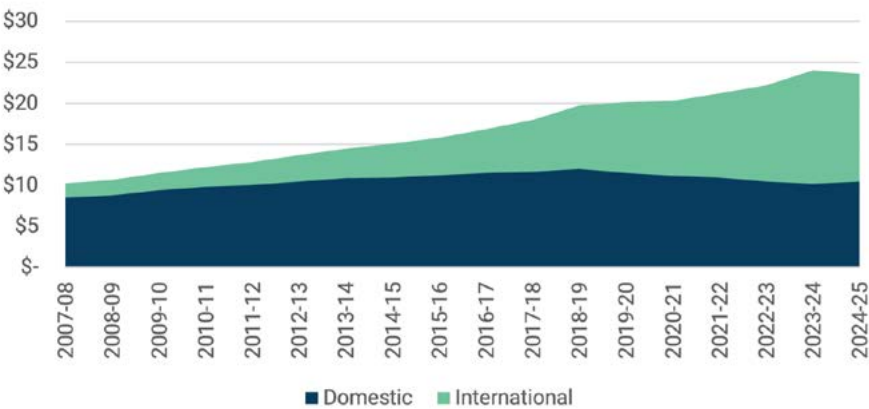
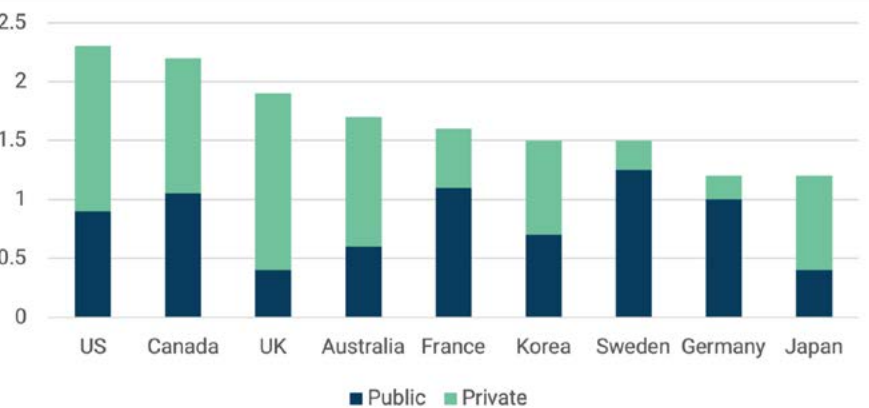


Figure 3.3: Tertiary Institutions’ Income by Source, as a Percentage of Gross Domestic Product, Canada and Select OECD Countries, 2023 or Most Recent Year



decade of stagnation in the 1990s during which total income decreased, mainly because of large real cuts to government expenditures. Then, from about 1998 to 2009, there were meaningful increases in revenue from all different sources, followed by another bout of stagnation in government expenditures following the 2008 recession. The difference between the 2010s and the 1990s, however, is that universities were able to keep increasing their overall income, even as revenues from government declined slightly. This was partly due to better income generation and stock-market returns, but it was also due to significant new tuition revenues, mainly from international students. As noted earlier, this is unlikely to remain the case after 2025.

Figure 3.5 puts the major trends of the past eighteen years into starker relief. In real terms, income from public sources was increasing sharply prior to the 2008 recession; roughly 6% per year after inflation, in line with the growth of income from student fees. After 2009-10, however, government revenue went into a long, gentle decline in real terms before recovering slightly after 2015-16 and staying roughly constant until 2024-25. Meanwhile, revenue from student fees grew at about 6% per year continuously through to 2021-22 before levelling off, resulting in an overall cumulative increase of 112% in real terms since 2007-08.

Figure 3.6 shows total college income by source since 2001-02. Trends in the college sector appear somewhat similar to those of universities, in that total institutional income has continued to increase over the past decade even as income from governments has stagnated. However, there are two important differences. The first is that revenues from self-generated income are much smaller in colleges than in universities, accounting for about one dollar in eight of total income, rather than one in three or four in universities. Second, the substantial 62% increase in student fee income in the years between 2020-21 and 2023-24 has no equivalent in the

Figure 3.4: Total Income by Source for Universities, Canada, in Billions (\$2024), 1979-80 to 2024-25

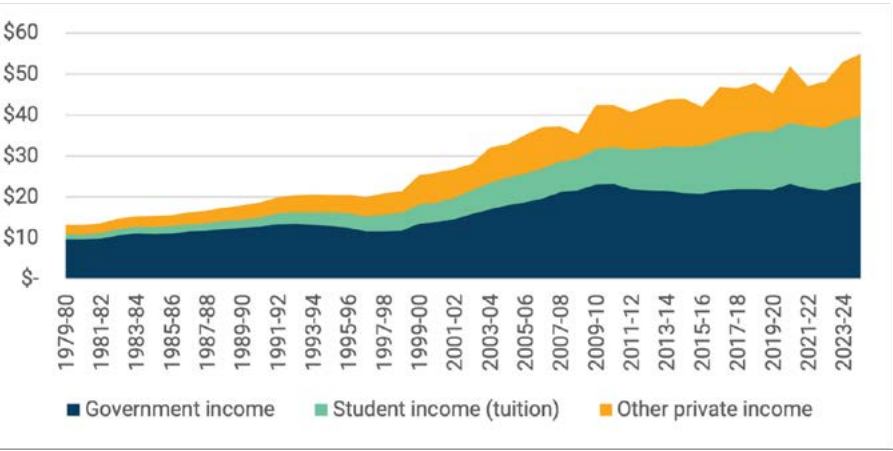


Figure 3.5: Real Change in Government and Student Fee Income, Canadian Universities, 2006-07 to 2024-25 (2006-07 = 100)

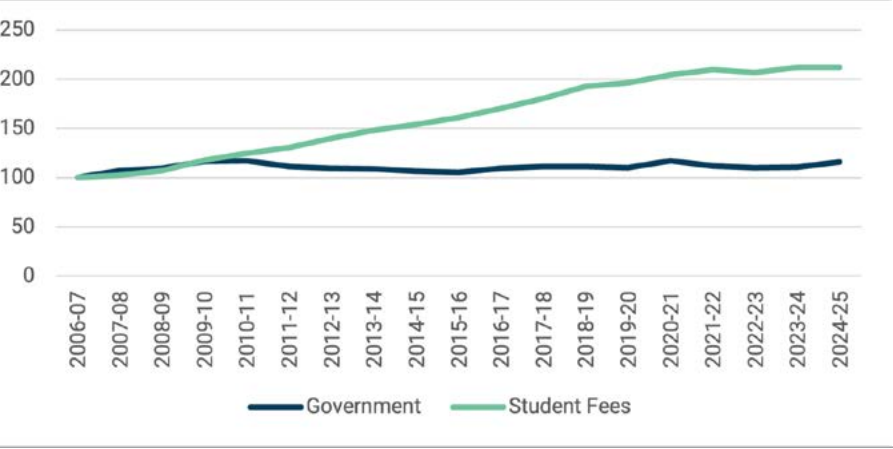
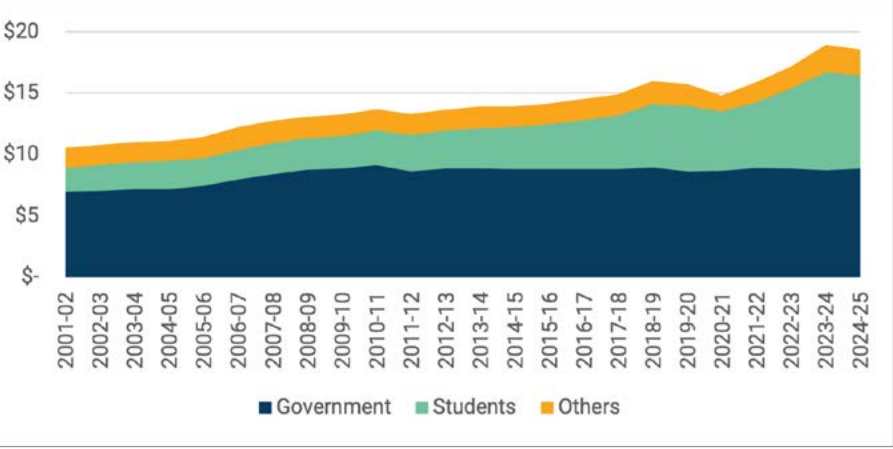


Figure 3.6: Total Income by Source for Colleges, Canada, in Billions (\$2024), 2001-02 to 2024-25



university sector. This jump was the result of community colleges increasing-ly enrolling international students, who could be charged higher fees—a situation which began to reverse itself in 2024-25 (see Chapter 1 for more details).

3.2 EXPENDITURE PATTERNS FOR PSE INSTITUTIONS

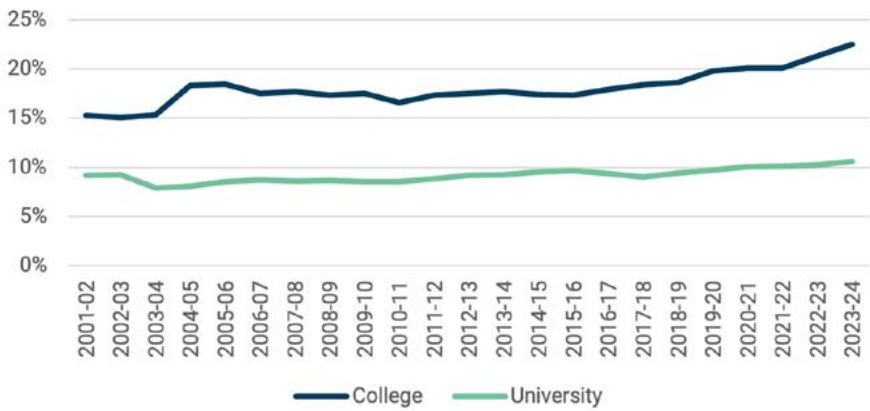
While overall expenditure trends closely mirror income trends, examining specific expenditure categories reveals more nuanced patterns. Although it is not possible to do this in an especially detailed way because of the way Statistics Canada uses different definitions to track spending in the two sectors, it is possible to make some very broad comparisons with some aggregation of categories. Table 3.1 considers total expenditures of universities and colleges by “fund.” Overall, the two systems look fairly similar. Expenditures on teaching and research collectively make up 63% of the budget in universities in 2023-24 and 48% in colleges; however, there is a difference here in the sense that nearly a third of this budget goes on research in universities whereas in colleges the equivalent is only 2%. Physical plant is 7% and 9% of total expenditures in universities and colleges, respectively, while student services are 7% and 10%.

Table 3.1: Distribution of Total Expenditures by Fund, Colleges and Universities, 2023-24¹

	College	University
Instruction & Research	48%	63%
Admin + ICT	22%	13%
Physical Plant	9%	7%
Student Services	10%	7%
Capital	9%	7%
Other	2%	3%

One perennial topic of conversation in Canadian higher education is the alleged tendency toward ever-increasing expenditures on administration. Statistics Canada data on college and university finances allow us to chart this trend over time in both sectors. Figure 3.7 shows that spending on administration (which includes spending on information and communications technologies²) is higher for colleges than universities. This seems to be mostly a function of institutional size; colleges are on average smaller than universities and therefore are not able to benefit from economies of scale, particularly on the

Figure 3.7: Expenditures on Administration & ICT as a Percentage of Total Spending, Universities vs Colleges, Canada, 2001-02 to 2023-24



Lighthouse Observatory, Université Sainte-Anne, NS

¹ University totals in this comparison are lower overall because about 10% of their total expenditures are not categorizable using the definitions employed by colleges.

² For colleges, the term “administration” includes all information technology costs as well as the costs of central administration and seems to include a number of other miscellaneous items. In order to keep the figures for the two sectors as consistent as possible, Figure 3.7 both for “administration and academic support” and “computing and communications” includes on the university side spending. Spending on “administration” alone is approximately 25% lower than what is shown here.

administrative side. The figure also shows that administration spending has increased in recent years, albeit significantly more so in colleges than in universities. It is unclear why this might be so; one possible explanation is that payments to international agents are classified as “administration”, in which case this increase is simply a reflection of the rapid increase in international students on the college side.

Examining institutional expenditures by type, rather than by fund (below in table 3.2), reveals that the two sectors also look similar on metrics like wages, benefits, and utilities. Even the limited differences observed often come down to categorization decisions as much as anything: “supplies” are higher in colleges, whereas “furniture and equipment” expenditures are higher in universities, but if we combine them as “non-wage expenditures on physical goods not classified as capital” then the two come out looking more or less the same. Perhaps the most significant differences are in library acquisitions and in expenditures on financial aid, both of which are much larger expenses at universities than at colleges. However, given that approxi-

mately 75% of university expenditures on scholarships are spent on graduate students, the gap between aid spending at colleges and spending on undergraduates at universities is likely about two-to-one rather than seven-to-one.

Table 3.2: Distribution of Spending by Type, Universities and Colleges, 2023-24

	College	University
Academic Wages	27.4%	26.7%
Other wages	21.1%	23.8%
Benefits	9.7%	10.1%
Library acquisitions	0.2%	0.9%
Supplies	7.2%	8.9%
Utilities	1.4%	1.6%
Financial Aid	1.0%	6.6%
Fees and services	13.5%	5.5%
Equipment	3.1%	4.8%
Buildings & Land	6.5%	6.8%
Debt service	1.0%	1.2%
Other	7.9%	3.0%

Wages have nearly doubled in nominal terms at both universities and colleges over the past fifteen years. However, since overall expenditures have grown by similar amounts in the two sectors, the change in compensation as a percentage of overall expenditures has been more muted. As figure 3.8 shows, total compensation in universities has inched up very slightly over the past fifteen years, from about 56% of total expenditures in 2010-11 to about 61% in 2024-25. On the college side (figure 3.9), the trend has been the opposite, with compensation falling from 64% to 58% of total expenditures between 2015-16 and 2024-25. This does not mean that total spending on compensation has declined because total spending has increased more or less in tandem with total income, and as we saw in Figure 3.6, total spending increased substantially over that period. It does, however, mean that other parts of the budget – notably fees and services, which includes payments to agents – have increased faster.

While figures 3.8 and 3.9 distinguish between spending on academic and non-academic staff, they do not shed light on another persistent debate within



higher education, referred to in the previous chapter, known as “academic casualization”; that is, the alleged tendency of universities and colleges to hire fewer full-time staff and more part-time staff. This debate was considered briefly in Chapter 2; however, we can shed more light on this phenomenon, in the university sector at least, by disaggregating the proportion of academic wages going to staff who are tenure-track (technically, “possessing academic rank”) and those who are not. A similar analysis cannot be done with respect to colleges because the structure of the college finance survey does not permit such a disaggregation.

Figure 3.10 does this by examining the proportion of total academic wages going to faculty who are without academic rank (roughly equivalent to wages going to “sessional” or “adjunct” professors) from 2000-01 to 2024-25. As the data show, this percentage fell gently but consistently between 2004 and 2018 from around 27% to approximately 25% of total wages, since which time it has levelled out. This finding does not entirely rule out the possibility that increased casualization is occurring. It could be that casual staff numbers are increasing but that their average wages, relative to full-time staff are simultaneously falling. But it does suggest that the financial impacts of any such increased casualization are not particularly noticeable at the national level, or at least that the benefits of casualization are not being transferred to full-time staff.

Figure 3.8: Wages as a Percentage of Total Budget, Universities, Canada, 2001-02 to 2023-24

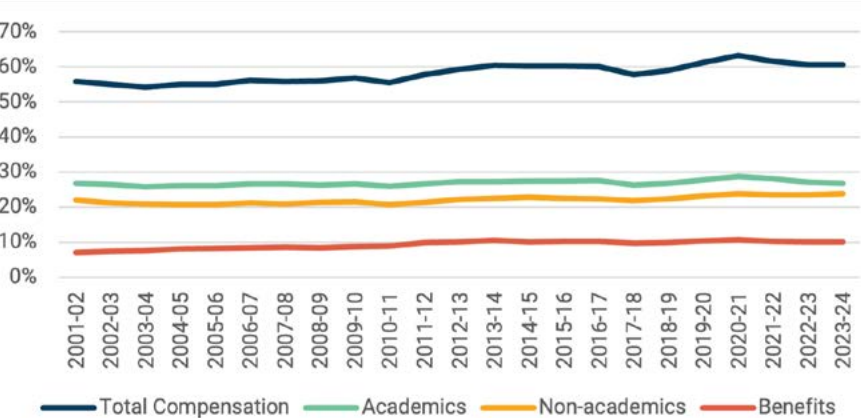


Figure 3.9: Wages as a Percentage of Total Budget, Colleges, Canada, 2001-02 to 2023-24

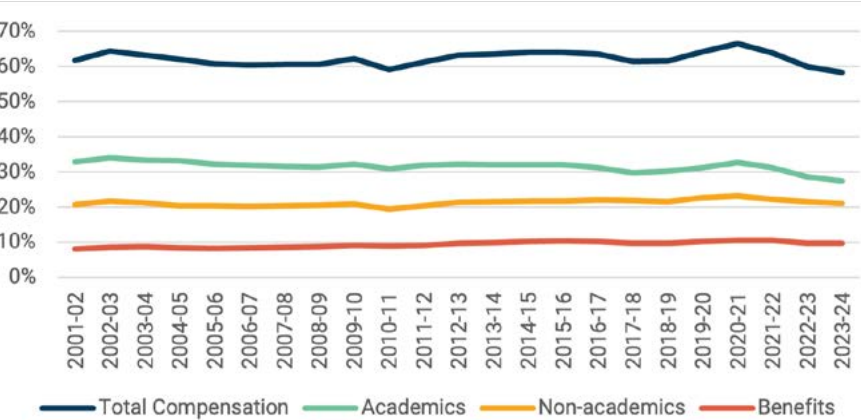
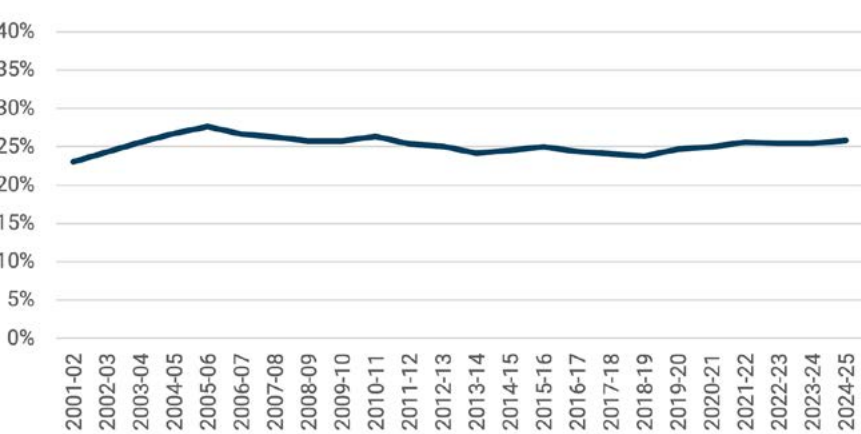


Figure 3.10: Percentage of Aggregate Academic Wages Going to Non-tenure Track Staff, Canada, 2000-01 to 2024-25



CHAPTER FOUR

Government Expenditures

04

KEY POINTS

- ▶ Nationally, provincial government transfers to institutions have stayed more or less constant in real dollars since 2010; that said, 2024-25 saw the largest increase in provincial funding in fifteen years.
- ▶ While national averages are fairly constant, there can be large swings at the level of individual provinces. In the decade up to 2024-25, Newfoundland and Labrador, Ontario, Saskatchewan and Alberta all experienced major declines in funding while Quebec, Prince Edward Island, and British Columbia experienced major increases.
- ▶ Provincial transfers per student are on average down 26% since 2008-09; 16% per student if international students are excluded.
- ▶ Provincial transfers to institutions decreased from 5.4% of total budgeted provincial expenditures in 2008-09 to just 3.5% in 2026-27.
- ▶ Federal transfers to provinces for postsecondary education (the “Canada Social Transfer” or CST) are increasing over time; the federal contribution now equals 20% of provincial spending on higher education, up from 14% sixteen years ago.

Government Expenditures

As was outlined in the previous chapter, institutional reliance on governments as a source of income is decreasing. Still, grants from government—particularly operating grants from the provinces—remain the largest single source of funding in the postsecondary sector. This chapter details these expenditures at both the provincial and federal levels. The main story is simple: during the first decade of the century, government expenditures increased at a substantial rate, both at the federal and provincial levels. In the aftermath of the global financial crisis of 2008–09, expenditures began to fall in real terms for over a decade. The onset of the COVID-19 pandemic resulted in a temporary increase in federal funding, but this was erased by inflation in the subsequent two years. 2024–25 was the first year in a decade where there was a significant increase in provincial expenditures, but in real terms public funding remains below where it was in 2009.

4.1 PROVINCIAL EXPENDITURES ON POSTSECONDARY EDUCATION

Data on university and college finances come from a pair of Statistics Canada surveys: the Financial Information of Universities Surveys (FINUNI) and the Financial Information of Community Colleges and Vocational Schools (FINCOL). At the time of writing, these provide information on PSE institutions' sources of funding up to 2024–25 and 2023–24, respectively; in order to bring the college sectors' financial data up to

date, individual colleges' financial statements for 2024–25 have been used to supplement Statistics Canada Data (see Appendix B for details).

Figure 4.1 shows a massive increase – roughly 50% – in funding for universities between 2001–02 and 2009–10, fuelled partly by the increase in enrolments in the sector. The growth in college income in the 00s was more muted, but this is mainly because in 2007 and 2008, several institutions in Alberta and British Columbia converted from college status to university status; without this shift, the

two sectors' patterns would appear more similar. However, since 2009–10, there has been very little change in the amount of government transfers to either type of institution.

Government expenditures on postsecondary institutions vary significantly across time and jurisdiction. Figure 4.2 shows that nationally, provincial transfers to institutions in 2024–25 were 4% above where they were in 2019–20 and 2% above where they were both in 2014–15, in constant 2024 dollars. However, this consistency at the national level belies

enormous variation at the provincial level. Newfoundland and Labrador, Alberta, Saskatchewan, and Ontario have all seen double-digit percentage point decreases in transfers to institutions over the past decade, but these have been mostly offset by a 26% increase in transfers in the province of Quebec, a 30% increase in Prince Edward Island (mostly due to the creation of a new medical school), and a whopping 44% increase in British Columbia, a large portion of which was earmarked for staff salaries. This figure vividly illustrates how understanding Canadian higher education requires looking beyond national figures, because national trends rarely play out in a uniform way across the country.

Along with the variation between provinces, one of the most important things to understand about Canadian higher education finance is the extent to which spending patterns in Ontario, the largest province, are out of line with those in the rest of the country. In fact, as figure 4.3 shows, Ontario’s per-FTE student expenditure drags down the national average so far that every other jurisdiction in the country bar Nova Scotia is technically “above average” when it comes to per-student expenditures. Per-student costs in the territories – which amount to just over \$101,000 per FTE student – are not shown in this graph because they

Figure 4.1: Aggregate Government Transfers to Institutions by Type of Institution, in Billions (\$2024), 2001-02 to 2024-25

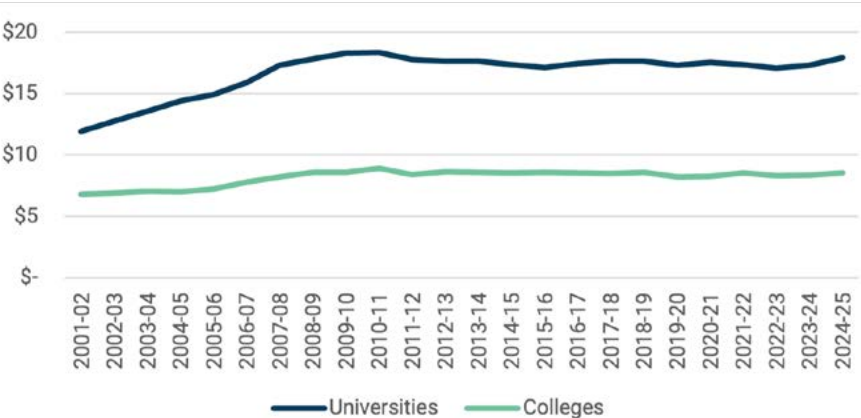
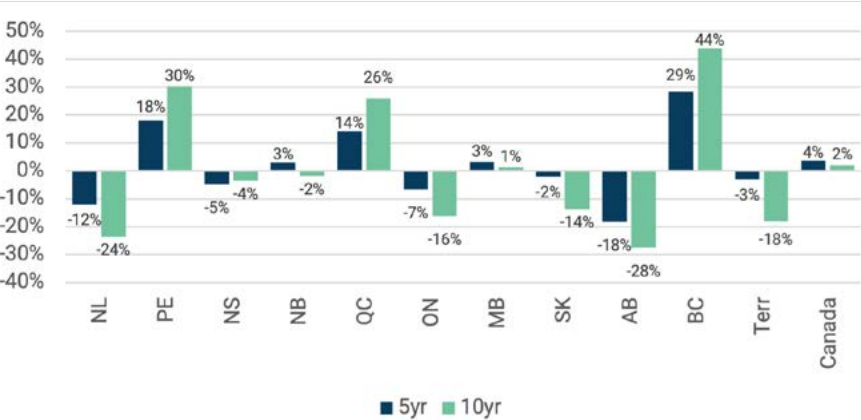


Figure 4.2: Changes in Provincial Transfers to Institutions by Province over Five and Ten Years, (\$2024), 2014-15 to 2024-25



Thunder Bay Campus, Lakehead University, ON

are so high that they throw off the scale. These exceptionally high costs are due to the expense of offering a relatively comprehensive suite of programs in the country's most thinly-populated areas.

As might be expected, government expenditures on the college and university sectors are not identical. Figure 4.4 shows that total provincial government expenditures for universities are somewhat higher nationally than they are for colleges (\$14,536 per student for universities and \$11,232 for colleges). This is by no means universal, however: in Nova Scotia and Saskatchewan, colleges receive more money than universities on a per-FTE basis. The very high figure for per-student expenditures in Newfoundland and Labrador can be explained by two funding anomalies at Memorial University; namely, that it hosts a very expensive technical institute (the Marine Institute) and that the province chooses to run a substantial chunk of health care costs for the province's Eastern Region through the university and its teaching hospitals. Absent these two factors, per-student expenditures in Newfoundland and Labrador would look very similar to those in other provinces.

Another way to analyze expenditure data is to track provincial expenditures per student over time. Figure 4.5 shows this calculation both per-FTE student and per-domestic FTE student, to account for the effects of the growth in international student numbers, since in many parts of the country international students are excluded from provincial funding formulas. Per-student funding hit a high of \$18,040 (\$19,264 per domestic student) in 2008-09 (both figures are in constant 2024 dollars). In the decade since then, spending per FTE student decreased by 26% (but only 16% if international students are excluded). Recall, however, that figure 4.1 showed relatively constant total transfers over time in real dollars. The decline in per-student funding shown in 4.5 is therefore not primarily a result of a decline in total funding; rather, it is a result of significantly increased enrolments, particularly of international students.

Figure 4.3: Provincial Expenditures per FTE Student, 2024-25, \$2024

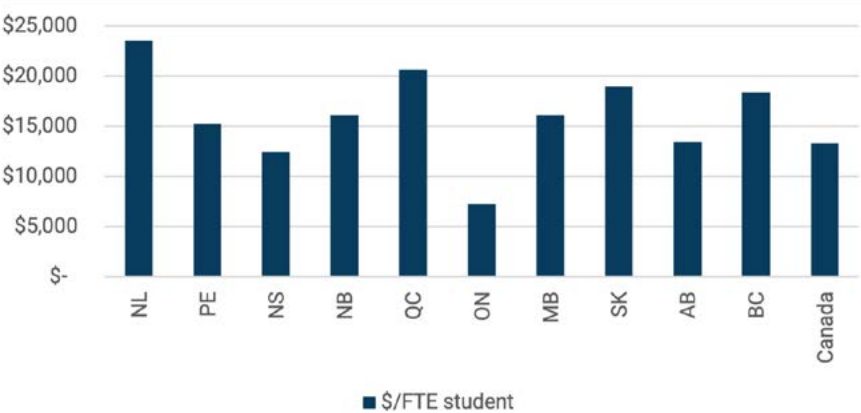


Figure 4.4: Provincial Expenditures per FTE Student by Sector, 2024-25, \$2024

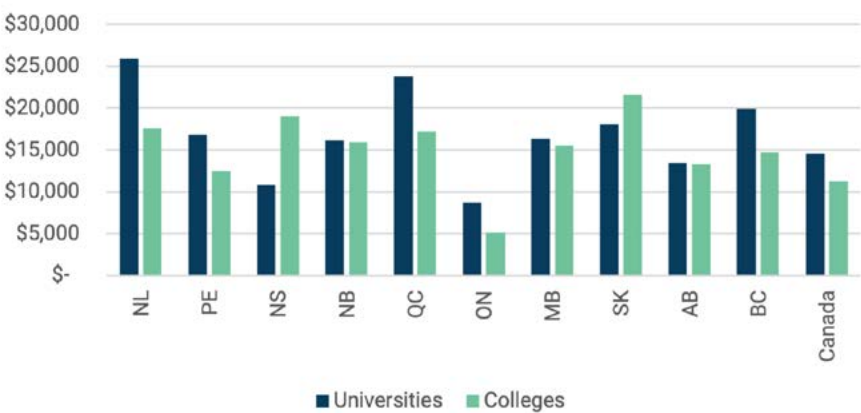
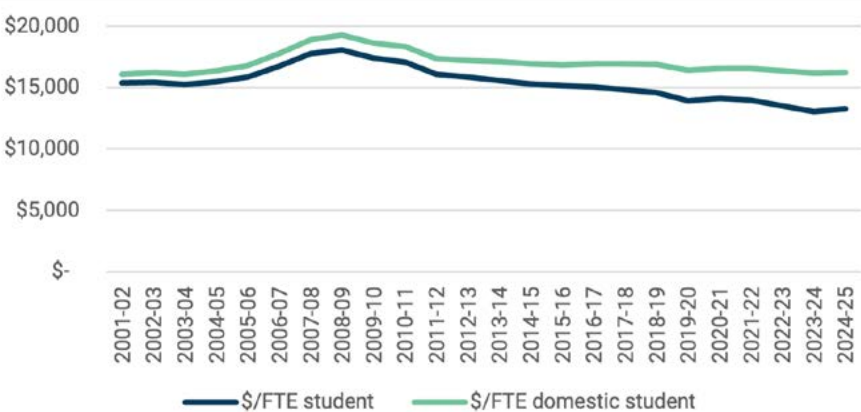


Figure 4.5: Total Provincial Funding per Full-Time Student, (\$2024), 2001-02 to 2024-25





How Funding is Distributed to Institutions

In all provinces, the government of the day decides the overall amount of funding that will go to the sector. How that money is divided among institutions is a more complicated matter.

In three provinces – Quebec, Ontario, and Saskatchewan – core funding is primarily distributed by an enrolment-weighted funding formula. That is to say, the amount of funding an institution receives is mostly based on the number of students it has in different types of programs. The three provinces use different weights for different subjects and levels, but generally the algorithms privilege clinical programs over laboratory programs and laboratory programs over lecture-based programs.

In the other seven provinces, funding is largely historically-driven: that is to say, what a school receives in any given year for core funding is largely a function of what it received the previous year, with some adjustments for new programs or new government initiatives. These changes are spread equally across institutions in the province, so that unlike in an enrolment-weighted system, there is less room for institutional shares of government funding to change over time.

Not all governments with historically-weighted formulas describe themselves this way. On occasion, New Brunswick and Nova Scotia will refer to their “funding formulas” as being enrolment-based even though neither has based funding on current enrolments for over a decade (at one point in the past, some or all of their funding was enrolment-weighted, and those calculations constitute

the historic base for determining annual increases or decreases). British Columbia has a system in which institutions are notionally paid for a pre-determined allocation of seats, but there is no mathematical link between the number and type of seats and an institution’s financial allocation. One partial exception is Alberta, which has mostly used a historically-driven model for about three decades. However, in 2019 and 2020, two large sets of cuts were imposed on the postsecondary education system. The first, a mid-year cut, was based on financial reserves (i.e., which institutions were best able to survive a sudden decline in revenues). The second, a multi-year reduction, was based on the degree to which costs at that institution were considered to be above those at peer institutions elsewhere in the country. Since then, the province has largely returned to a historically-driven model.

Only two provinces – Ontario and Alberta – currently use any kind of performance-based funding (that is, funding based on outputs rather than inputs). In 2019, both provinces announced plans for vastly expanded performance-based funding schemes that would eventually put up to 60% and 40% (respectively) of core funding “at risk”, and which could be reclaimed by achieving a set of targets around graduate employment, research output and other such measures; in practice, however, the way the performance funding has been implemented in these two provinces means that only tiny sums of money—perhaps 1 or 2% of total government funding—have ever been added to or subtracted from institutional transfers as a result of changes in performance.

There are limitations to using per-student expenditures as a method of comparing provincial commitment to a sector. For one thing, they tend to reflect attendance patterns rather than a province's ability to pay. A complementary way to compare provincial expenditures is to calculate higher education spending as a function of the provincial economy's size. Figure 4.6 shows provincial PSE expenditures as a percentage of provincial Gross Domestic Product. Nationally, this figure comes to about 0.85%, but as usual it varies substantially by province: in Quebec it is 1.51% of GDP, while in Ontario it is just 0.54%. The proportion going to colleges and universities is relatively close: in most provinces, the college share is between 25 and 34% of expenditures. The four exceptions are Newfoundland and Labrador (21%), Quebec with its very large CEGEP system (40%), Prince Edward Island (35%), and the three territories where the college figure is nearly 70%.

Another way of looking at spending on an area of public policy is to look at the percentage of total provincial spending that it consumes, as in figure 4.7. In 2007-08, provincial governments devoted 5.4% of provincial spending to postsecondary institutions; by the 2025-26 budget cycle, the figure had dropped to just 3.3% of provincial spending, before recovering slightly to 3.5% for 2026-27 thanks to a large jump in expenditure in Ontario. The drop affected every single province, but was most significant in Alberta, where postsecondary spending was a phenomenal 7.9% of total spending in 2008-09 but just 3.1% in 2026-27. Currently, Quebec is the province with the highest share (4.4%); predictably, the province with the lowest share is Ontario (3.0%).

4.2 FEDERAL EXPENDITURES ON POSTSECONDARY EDUCATION

The Government of Canada has four main mechanisms for transferring money to postsecondary institutions. The first is via the research granting

Figure 4.6: Provincial PSE Expenditures, by Sector, as a Percentage of Provincial GDP, 2024-25

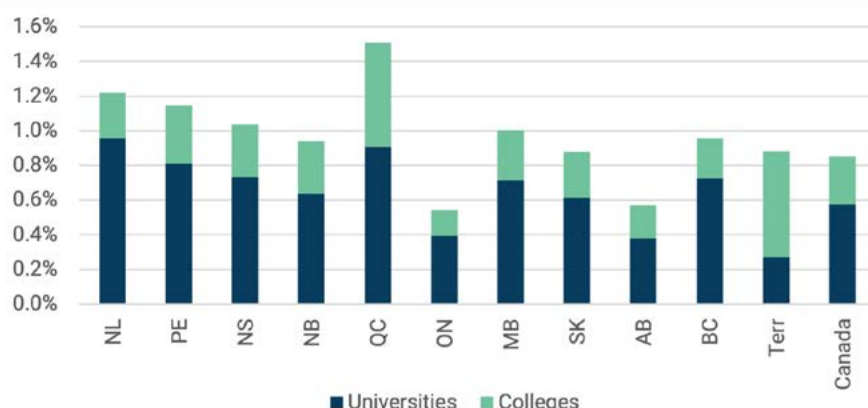
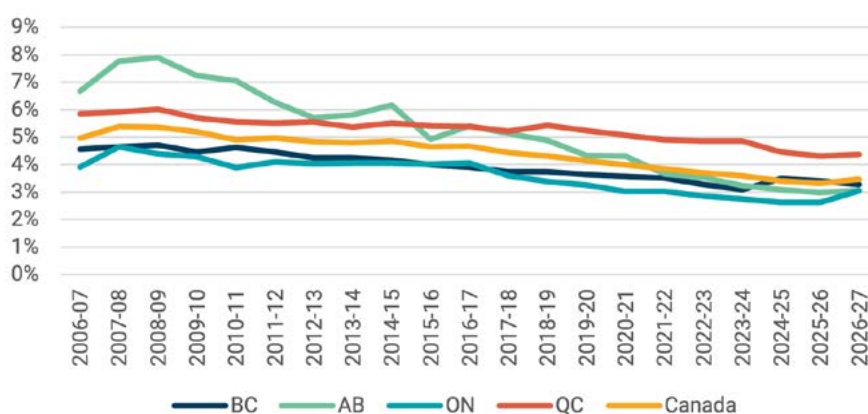


Figure 4.7: Budgeted Provincial PSE Expenditures as a Percentage of Total Provincial Expenditures, Canada and Selected Provinces 2006-07 to 2025-26



councils: that is, the Canadian Institutes for Health Research (CIHR), the Natural Science and Engineering Research Council (NSERC), and the Social Sciences and Humanities Research Council (SSHRC), which together are the largest source of federal dollars to most institutions. These three disciplinary-based councils are known collectively as the "Tri-Council" agencies. As of 2018, however, the Government of Canada now considers the Canada Foundation for Innovation (CFI), which disburses money for scientific infrastructure, to be a fourth granting council.

The second mechanism is through a variety of other smaller scientific agencies and government departments (e.g.,

Health Canada), which transfer at least some of their money to postsecondary institutions. The third mechanism is occasional large investments in capital spent on postsecondary institutions, such as the Knowledge Infrastructure Program (KIP) of 2009-10 and the Strategic Infrastructure Fund (SIF) of 2016-17. The fourth and final mechanism is an indirect method of transfers via funds included in the Canada Social Transfer (CST) that are, at least notionally, earmarked for funding postsecondary education.

The four granting councils provide a little over \$3.4 billion in funding to Canadian institutions every year, with close to 99% of this funding going to universities. This total increased very quickly in the first

half of the 2000s but then stalled for over a decade. It increased somewhat after 2018 and the federal government's positive response to the Fundamental Science Review of 2017, although in real terms the increase was less than expected because of the severity of inflation in the COVID era. The council's long-term spending patterns have changed little over the past two decades: the increase in SSHRC spending since 2017-18 is explained not by increased funding for the social sciences and humanities specifically but rather because SSHRC was chosen to administer a number of new-ish interdisciplinary research programs and hence those funds are all counted under its name.

There are a variety of other federal sources of postsecondary funding which total a little over \$2.3 billion. The largest of these sources is the Canada Research Chairs program, which provides around \$350 million annually to Canadian universities to support talented researchers. Other federal funds arrive through departmental budgets and allocations. For instance, Health Canada provides universities with roughly \$65 million per year for various services; Employment and Social Development Canada provides about \$40 million per year to colleges for various training programs. Research funds also flow through various specialized science agencies such as Brain Canada and Genome Canada. Some money comes to PSE institutions through regional development agencies, mainly for infrastructure. Finally, the Government of Canada periodically spends large amounts of money on university and college infrastructure through one-time programs such as KIP (2009) and SIF (2016), which tend to appear during periods of economic downturn. These infrastructure programs are as much about Keynesian counter-cyclical support to the construction industry during economic downturns as they are about higher education. Nevertheless, programs like KIP and SIF have permitted significant renewal and expansion of facilities on Canadian campuses over the past two decades.

Figure 4.8: Research Granting Council Expenditures by Council, in Millions (\$2024), 2001-02 to 2024-25

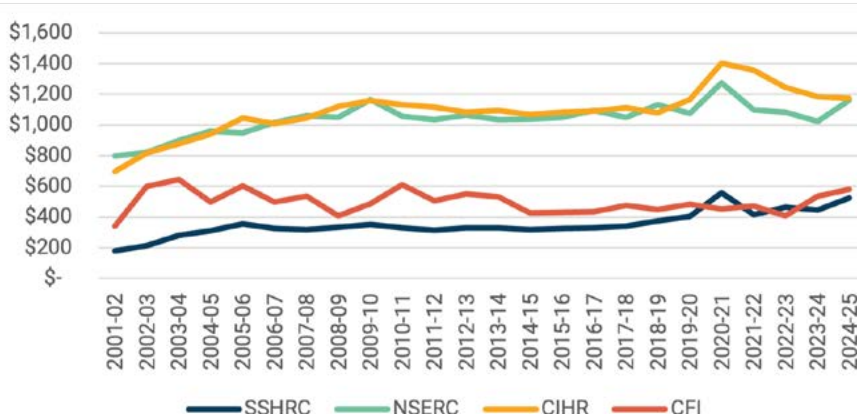
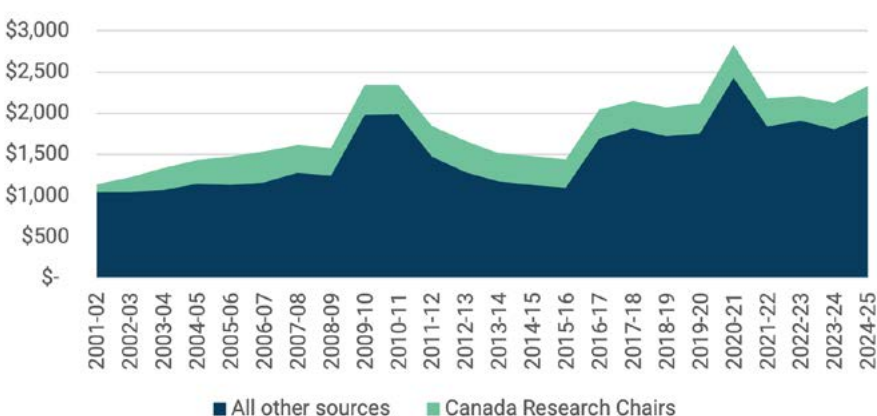


Figure 4.9: Direct Federal Funding to Postsecondary Institutions, Excluding Tri-Council Funding, in Millions (\$2024), 2001-02 to 2024-25



Waterloo Campus Indigenous Student Centre, Wilfrid Laurier University, ON

A Short History of Federal Transfer Payments

While higher education is unquestionably a matter for provincial governments under the Canadian constitution, a variety of attempts have been made to try to compel the federal government to support it.

Starting in 1957, the Government of Canada attempted a modest form of direct support to institutions. This was achieved through transferring a lump sum based on a per capita calculation (initially \$0.50 per Canadian) to an intermediary organization owned and managed by what is now Universities Canada, which then transferred the sums to individual institutions under its own formula. In 1967, this direct support was replaced by the Federal-Provincial Fiscal Arrangements Act, under which the Government of Canada agreed to split the costs of PSE 50/50 with the provinces. In 1972 this program was amended slightly by setting an overall growth cap of 15% per year. This program was not entirely run through cash transfers; a substantial portion of the federal contribution came through what are known as “tax points”; that is, a cession of tax room so that when federal tax rates decrease, provincial ones could equivalently increase.

In 1977, this arrangement was replaced with something called Established Programs Financing (EPF), which combined federal contributions for health and postsecondary education into a single transfer made up of a combination of cash and tax points. The cash transfer under EPF was initially tied to the rate of nominal GDP growth; later, total EPF was linked to GDP growth, with the cash transfer becoming a residual after tax points, with the result that the cash portion as a proportion of the overall transfer began to shrink. Subsequently, program growth rate was reduced to GDP minus 2%, then to GDP minus 3% before being frozen altogether in 1990, all in the name of deficit-reduction. Since tax points continued to increase in value along with the size of economy, and the cash transfer was a residual, the cash portion of EPF dwindled at an increasingly rapid pace. At the time, it was widely expected that the cash portion of the transfer would fall to zero in the early 2000s.

In 1995, the Government of Canada merged the EPF with another provincial transfer payment known as the Canada Assistance Plan (CAP) into a new program called the Canada Health and Social Transfer (CHST). This new, larger transfer was essentially one enormous block-grant of cash and tax points to the provinces, the only conditional element of which was that the provinces respect the Canada Health Act. The cash portion of the new CHST was initially set at just \$12.5 billion, which was \$6.5 billion less than what had been available to provinces under the combined CAP/EPF. But the 1995 budget also placed a floor under cash transfers, which put to rest the fears that cash payments would eventually dwindle to zero. As the economy recovered after 1996, the CHST cash payments grew. Over the next few years, as the economy improved, billions of new dollars were poured into the transfer, mostly for the purposes of shoring up the health system; though accountability arrangements were not formally changed, provinces agreed to publicly announce what they would do with any new money received through the transfer. By 2004, the value of the cash transfer had risen to \$22.3 billion.

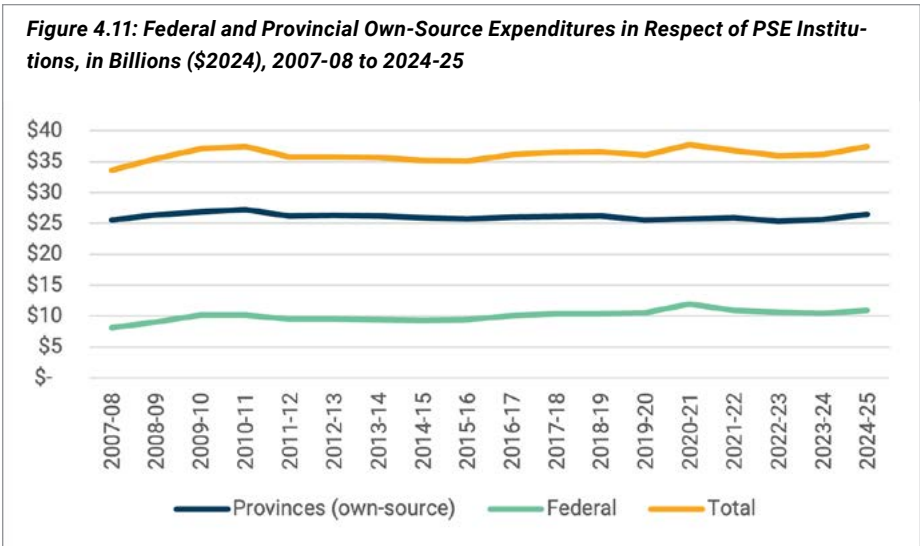
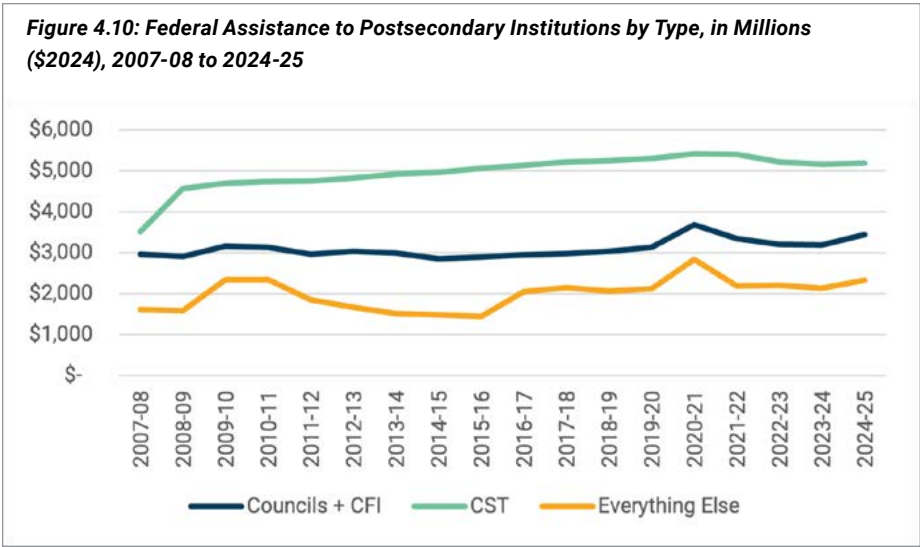
In 2004, the CHST was split into a dedicated Canada Health Transfer (CHT) and a Canada Social Transfer (CST), with the latter designed to include spending for postsecondary education, social assistance, and childcare. The initial value was set at \$8.3 billion. In 2007, the Government of Canada announced an \$800 million increase to CST specifically for postsecondary education, though there was no way to directly tie this investment to specific actions by the provinces. Still, for the first time since the demise of EPF, it was possible to see the actual amount of cash transfer “designated” for PSE. Since then, 30.7% of the CST – which is now valued at over \$16.5 billion – is deemed related to postsecondary education, meaning that federal transfers “in respect of” postsecondary education are currently just over \$5 billion per year. This is equal to about 20% of provincial expenditures on postsecondary institutions, up from just 14% in 2007.

Finally, there is the matter of federal transfer payments to provinces for postsecondary education. Figure 4.10 shows the relative importance of the CST compared to other forms of federal expenditures. Because CST increases automatically in nominal dollars every year while other forms of funding have dropped off somewhat, the transfer is now a much more important part of the overall federal effort than it was even a decade ago (CST actually declined in real terms in 2022-23 and 2023-24 because of higher-than-usual inflation). For the past two decades, CST has

accounted for somewhere between 45 and 55% of federal expenditure in respect of postsecondary education.

Thanks to the Government of Canada’s clarification with respect to the division of CST funds from 2007-08 onwards, it is possible to look at the distribution of postsecondary funding in Canada between federal and provincial governments without risk of double-counting the federal transfer. This is shown below in figure 4.11. Two things stand out from this figure. First, if we look at federal expenditures on research, infrastructure,

and unconditional transfers versus provincial own-source expenditures (i.e., their expenditures net of CST), a nearly perfect 2.5:1 ratio of provincial to federal expenditure emerges. This is significantly changed from what was effectively a 3:1 ratio in 2007-08 prior to the introduction of the CST. Second, these figures are remarkably consistent over time: notably, the federal numbers changed not at all during the handover between Conservative and Liberal governments in the mid-2010s.



Library and Learning Commons, Nova Scotia Community College, NS

CHAPTER FIVE

Tuition & Student Aid

05

KEY POINTS

- ▶ National average domestic tuition is rising again in real terms after falling in real terms for several years. In real terms, current fee levels remain about 5% below their 2018-19 peak.
- ▶ The gap between domestic and international student tuition fees continues to widen.
- ▶ Total need-based government aid (loans and grants) in Canada was \$13 billion in 2024-25, with 39% of this coming in the form of grants.
- ▶ Total aid from all sources was approximately \$21.7 billion in 2024-25, roughly three times its early 1990s levels, after adjusting for inflation.
- ▶ Total non-repayable aid from all sources was approximately \$13-14 billion. Given that aggregate domestic tuition fees are roughly \$10 billion, this suggests that Canada has net-negative tuition fees on average.
- ▶ Thanks to these major increases in student aid, debt levels at graduation have stayed roughly constant since the turn of the century. This may however change in the near future given policy changes in Ontario and at the federal level.

Tuition & Student Aid

One of the most-watched elements of higher education policy relates to affordability. For the most part, the affordability debate focuses on the sticker price of tuition. However, this is only one part of the equation, because for all the billions of dollars institutions collect from tuition, Canadian governments and institutions also provide even more billions of dollars in subsidies and scholarships to offset that tuition. Examining these issues in a pan-Canadian context is challenging, because tuition and student aid policies vary across provinces. This chapter covers both tuition and student assistance, in order to provide as complete a picture of accessibility as possible.

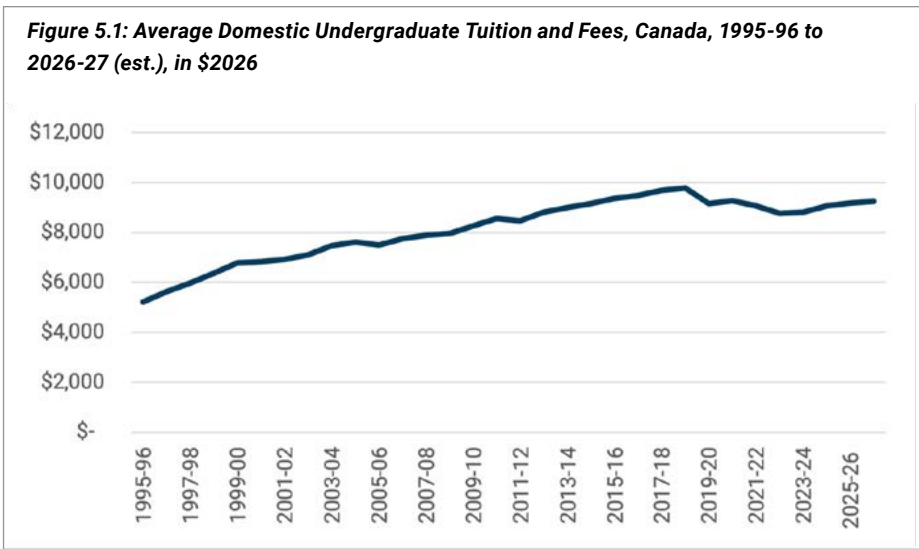
5.1 TUITION

Tuition fees are subject to a great deal of tug-of-war between institutions and provincial governments. Generally, the institutions seek greater freedom to set fees in order to raise revenues while provinces seek greater control over institutional policy to limit negative headlines about the cost of education (though they often lack the concomitant desire to provide institutions with greater funding to compensate for lower tuition). This tug-of-war plays out differently across provinces and across time. At times provinces impose tuition fee freezes, and at others they permit fees to be de-regulated. Genuinely consistent pan-Canadian trends in fee policies are few and far between.

Figure 5.1 shows domestic student tuition plus mandatory fees at Canadian universities, in real dollars, from 1995 to

2026 (the current year's data is an estimate based on various provincial and institutional fee announcements). In the 1990s, annual average increases in tuition were to the order of 5-7% per year,

after inflation. After 2000 or so, once the era of significant austerity was over, increases in tuition began to slow, and since that time, annual average increases in university fees have been very



close to 2% per year after inflation. 2019-20 was an exceptional year due to the Ontario government's decision to cut all tuition by 10%, which led to a substantial decline in the national average. This cut was followed by a six year freeze during which time above-average inflation ate away at the real value of the fees. Since 2024-25, we have seen increases in average tuition fees partly due to a greater proportion of students choosing to enrol in more expensive science and engineering programs, but partly also due to the very large increase in out-of-province student fees in the province of Quebec. After inflation, average undergraduate fees today are roughly where they were in 2014-15 (that is, about 5% below the peak in 2018-19), although this moderation in the "national average" has been largely driven by events in Ontario.

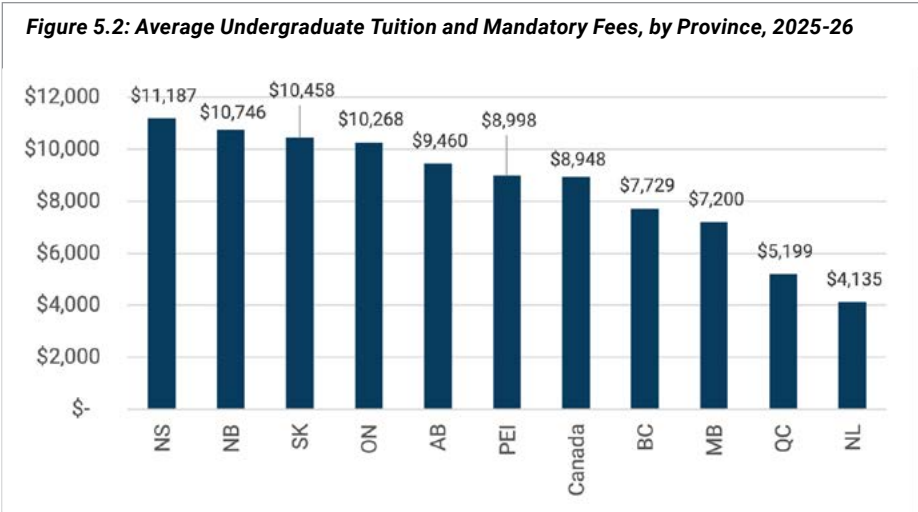
Statistics Canada chooses not to survey colleges on the issue of tuition, and colleges choose not to be overly transparent about it; as a result, we cannot track tuition fees at the college level the way we do in universities. The closest we can come to obtaining national college tuition figures is to look at revenue per full-time equivalent (FTE) student, which is available by combining data from FINCOL and PSIS. Based on FINCOL estimates of total tuition income, and the estimates of international student fee income made for figure 3.2 (above), we

can determine that domestic college students paid about \$2.5 billion in tuition fees in 2025-26. Divide this figure by the estimated number of domestic college students in 2025-26 (excluding CEGEPs which are tuition-free for most students), and the figure is around \$7,100 per FTE student per year.

Undergraduate tuition and fees vary by province. Quebec and Newfoundland and Labrador have very low tuition fees, both resulting from lengthy periods of tuition fee freezes over the last 40 years. Nova Scotia has the country's highest fees. However, New Brunswick, Saskatchewan, and Ontario are not far behind. Average provincial fee levels do not appear to drive participation rates in Canada; Ontario has the highest partici-

pation rate in the country, and Nova Scotia is still able to attract proportionately the largest number of out-of-province students of any province. Meanwhile, Manitoba has low tuition fees as well as relatively low participation and attainment rates.

Fees also vary considerably by field of study. Figure 5.3 shows the variation in tuition fees for first-entry university undergraduate programs, while figure 5.4 shows tuition for programs that are primarily second-entry university professional programs. Note that these figures include only tuition and not mandatory fees; this is because Statistics Canada produces data on average mandatory fees (which run to about \$1000 per year) but does not break them



down by field of study, making like-to-like comparisons across fields impossible. Figure 5.3 shows that the median program price across three of the largest fields of study in Canada (science, social science, and humanities) is in the mid-\$6,000s, while the median for business programs is in the mid-\$8,000s. Even adding on the \$1,000 or so from ancillary fees would only bring the median tuition fee to somewhere around \$8,000, or about 14% lower than the national averages noted in figures 5.1 and 5.2.

The reason for this 14% gap between mean and median is simple: A small number of professional programs – shown in figure 5.4 – charge fees that are dramatically above the median: over \$27,000 per year in dentistry, over \$16,000 in medicine, and over \$15,000 in law. Even with relatively small numbers of students, these fee levels push the overall average up significantly.

Domestic tuition fees are only part of the story, however. International student tuition dollars became a vital source of funding for universities and colleges in the period after 2016 (see chapter 4). As figure 5.5 shows, those increased funds came not just from increased numbers of students, but also from increased fees paid by each student. While domestic undergraduate student tuition increased at roughly inflation plus 2% before decreasing after 2018-19, international student fees increased at inflation plus 5%. The effect of compounding means the two types of tuition fees diverged significantly over time. In 2007, international student fees were \$20,314 or about 3 times the domestic rate; by early 2025, they were \$41,746 or over 5 times the domestic rate. Until the imposition of visa caps by the federal government, these higher fees went in tandem with regular double-digit increases in international student numbers. Despite increasing fees, Canadian institutions never priced themselves out of the market.

Figure 5.3: Average Tuition Fees, by Field of Study, First-Entry Undergraduate Programs, Canada, 2025-26

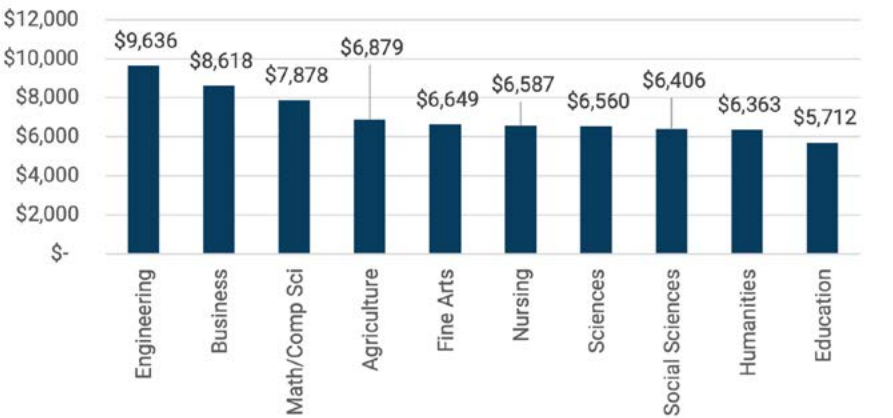


Figure 5.4: Average Tuition Fees, by Field of Study, Second-Entry Professional Undergraduate Programs, Canada, 2025-26

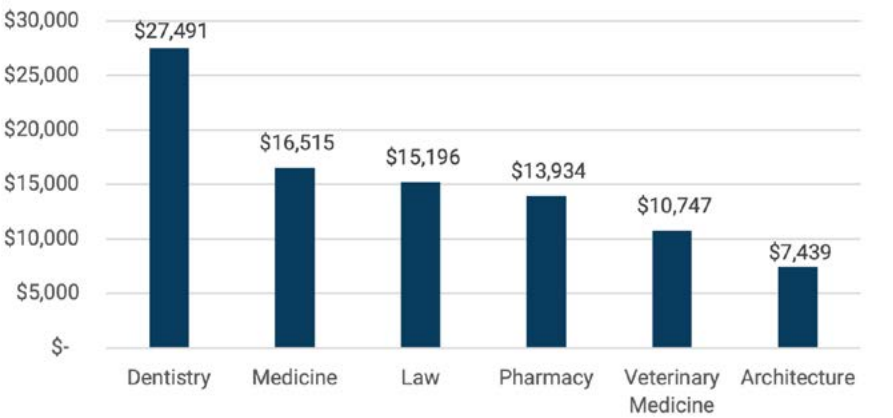
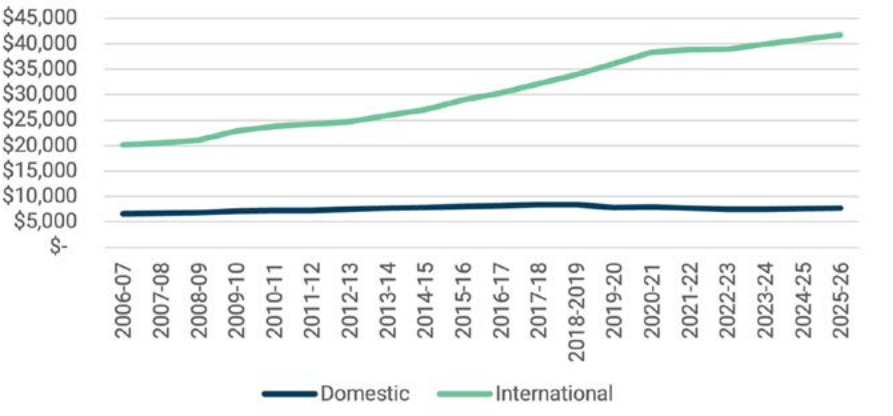


Figure 5.5: Domestic vs. International Student Tuition, Canadian Universities, 2006-07 to 2025-26, in \$2025

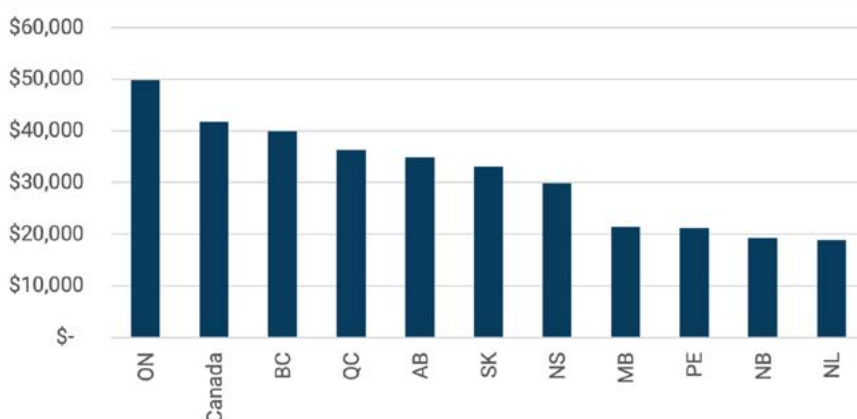


As is usually the case in Canada, the picture for international undergraduate student fees varies by province. In the two provinces attracting the greatest number of international students, tuition fees are quite high. In Ontario, average annual fees are almost \$50,000, and in British Columbia, they are nearly \$40,000. In the rest of the country, international student fees are more modest. In Manitoba and Newfoundland fees have yet to pass the \$20,000 mark. The reason for these gaps is unclear, but presumably institutions in provinces without a major metropolis feel they may have more difficulty attracting international students and so price their offerings accordingly. Intriguingly, universities outside of Ontario and British Columbia mostly seem to set their prices below the average operating cost per student. This is presumably why so many of them claim not to be making money from international students, despite the higher fees. However, the actual relevant metric here is not average student costs but marginal student costs, which can be quite low, meaning that even when charging low fees an institution is better off accepting more international students.

5.2 STUDENT ASSISTANCE

Student aid in Canada comes in many different forms. The most prominent of these forms is need-based student assistance, or student loans and grants.

Figure 5.6: International Undergraduate Student Tuition by Province, Canadian Universities, 2025-26



However, there are several other very significant sources, including tax credits, education savings grants, institutional scholarships, and sundry other funds like federal graduate scholarships and support for Indigenous students. In this section, we look at each of these areas in turn.

5.2.1 Need-based Student Assistance

Student assistance is an area of joint responsibility between the federal and provincial government. Not only is there a national program – the Canada Student Financial Assistance Program (CSFAP), formerly the Canada Student Loans Program – but every province has its own student aid program. In nine provinces and one territory, these

programs run alongside the federal program. Quebec, Nunavut, and the Northwest Territories have opted out of the CSFAP and receive compensation in lieu, which they use to fund their own standalone student aid programs. In provinces where federal and provincial loan programs run side-by-side, the provincial government manages both programs, permitting them to integrate federal and provincial assistance in a relatively seamless fashion. As such, students are only required to fill in a single application to access both the provincial and federal programs, even though the need assessment processes for the two programs may be somewhat different. To a large extent, provinces treat the federal program as a base and build their own program around it; since



Downtown Campus Interior, Vancouver Community College, BC

different provinces have different levels of resources to devote to student aid and different priorities in terms of spending them, the resulting “combined” student aid programs can look very different from one province to another.

Student loans are based on “assessed need”. An applicant’s costs of education (e.g. tuition, materials, books) and living (e.g. housing, food) are assessed, the latter according to a standardized allowance, to arrive at a total annual cost figure. Then the applicant’s income and (in some cases) assets are assessed; if a student is considered a dependent, then their parents’ income is also assessed, and if a student is married, then the spouse is assessed. This assessment leads to a determination of “resources” the student has available. Costs minus resources equals need, subject to a total assistance maximum. This maximum varies somewhat by province and student status, but in 2025-2026 it was at least equal to \$500/week of study (\$17,000 per academic year) for most students in most provinces, up from \$350/week (\$11,900) in the decade or so prior to that.

In contrast to loans, grants are usually based on income (both personal and family for applicants who are considered dependents) rather than need. This is the case for nearly all federal grants, as well as those in the province of Ontario, which as of 2025-26 was the source of over half of all provincial grants in the country (a significant policy change in early 2026 means this will no longer be true in 2026-27 as grants in the province were cut back significantly). In most other provinces (including Quebec), however, grants are based either directly or indirectly on need rather than income. In addition, a non-negligible portion of both provincial and federal assistance is also based on the presence of a disability.

Historically, a peculiarity of the Canadian student aid system has been the tendency of provinces to deliver at least a portion of their non-repayable assistance (i.e. grants) in the form of forgivable loans.

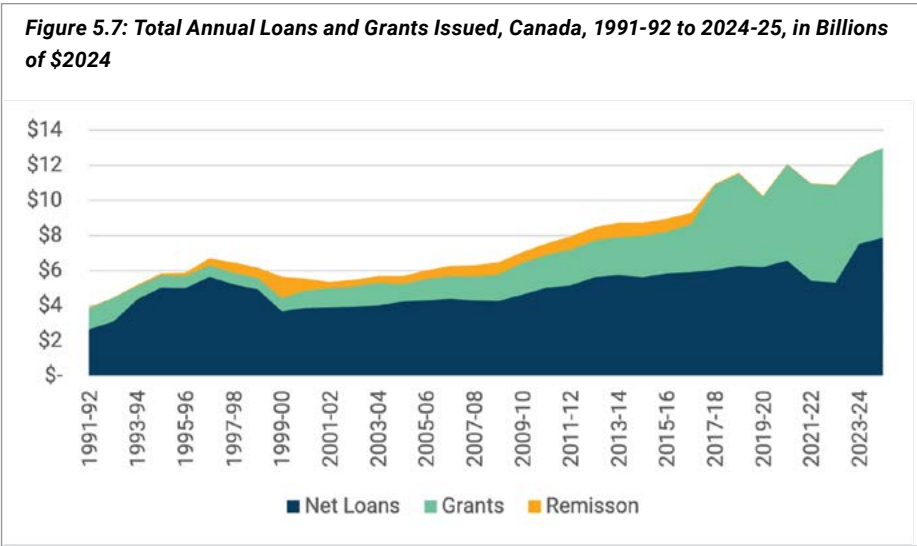
For example, prior to 2017 in Ontario, single students enrolled for two standard-length terms per academic year could borrow up to \$11,400, of which \$4,300 (that is, the entire provincial portion of the loan) could be forgiven if the student successfully completed their year of studies. For the most part, such programs have been on the wane for the past decade, though they remain a significant part of the policy mix in Nova Scotia.

Actual figures on loans and grants in Canada are difficult to gather. Federal data are, at best, two years out of date by the time an annual report is released. Apart from Alberta, Quebec, and Saskatchewan, most provinces do not publicly release data on the amounts of loans and grants they deliver. Through to about 2010, provincial governments did publicly release some loan/grant statistics via an annual survey run by the Canada Millennium Scholarship Foundation, so reasonably good data are available until the start of this decade. Since then, it has been more difficult to obtain data. For the past several years, Higher Education Strategy Associates has used freedom of information requests to update pre-2010 data to the year 2024-25.

Figure 5.7 shows the total need-based assistance issued by type in Canada over the past 30 years, in constant 2024 dollars. Net loans – that is, total loans minus loan remission – are shown to

avoid double-counting. Student loans reached a peak during the recession in the mid-1990s when tuition fees were increasing quickly, before fading away due to a combination of lower need (as students began to earn more income in the post-96 recovery) and a tightening of student loan criteria to exclude more students at private vocational colleges. From about 2000 onwards, the total amount of student aid provided by Canadian governments, both federal and provincial, increased by about 4% per year on average after inflation. It then increased very substantially in 2017-18 due to changes both in the federal program and in the province of Ontario, which in both cases involved eliminating tax credits and converting them to grants. Grants temporarily became a larger portion of the overall aid mix from 2020-21 to 2022-23 due to federal COVID measures that boosted the value of the federal grant portion of student aid, but loans bounced back in 2023-24 after these time-limited measures ended. In the final year for which data is available, 2024-25 total government need-based aid was just over \$13 billion, of which 61% came in the form of loans. Of the remaining portion, roughly 99% was delivered in grants and the rest through various forms of provincial loan forgiveness. It is expected that the loan portion will increase significantly – to just over 70% or so – in 2026-27 as the result of announced changes in the

Figure 5.7: Total Annual Loans and Grants Issued, Canada, 1991-92 to 2024-25, in Billions of \$2024



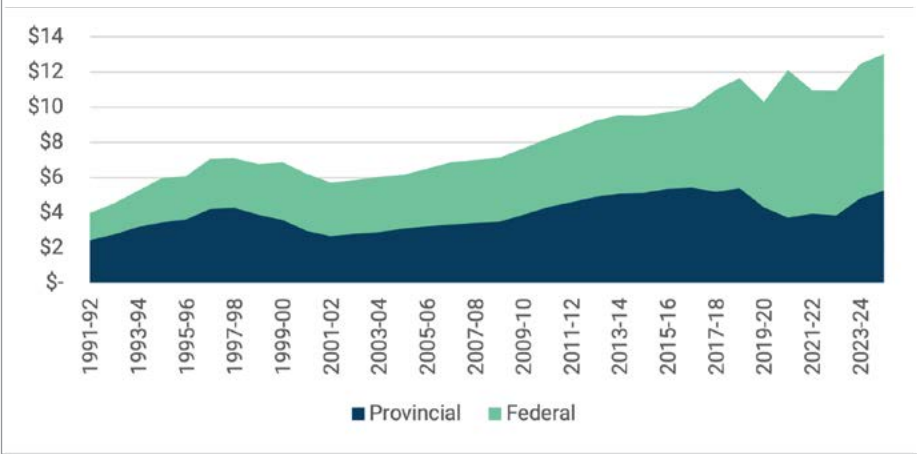
Ontario Student Assistance Program, which substantially shifted the program's emphasis from grants to loans.

There have also been shifts over time in the sources of student aid. In the mid-1990s, most of the aid provided came from provincial governments. After 2000, and the creation of the Canada Millennium Scholarship Foundation, the balance shifted, and a little over half of all student aid began to be provided either directly or indirectly by the federal government. In the early 2010s, provincial funding grew somewhat — thanks mainly to policy changes made by the Wynne government in Ontario— and it was provinces that, again, provided over 50% of support to students between 2012 and 2016. However, since the election of the Trudeau government and perhaps more pertinently of the Ford government in

Ontario, the pendulum swung back again. As a result, at the height of the COVID crisis, the federal government provided almost 70% of all student aid in Canada. Since 2023 and the federal

government's pullback on student grants, however, the proportions have shifted again, and the provincial share of total aid is now back up to 40%.

Figure 5.8: Total Annual Need-Based Student Aid by Source, Canada, 1991-92 to 2024-25, in Billions of \$2024



The Rob and Cheryl McEwen Graduate Study and Research Building, York University, ON

Education Tax Credits in Canada: A Short Explainer

Tax-based assistance for postsecondary education in Canada predates the student loan system. The Diefenbaker government introduced the first tax deductions for education in the late 1950s as an alternative to a national system of grants. These deductions were for tuition plus a set monthly allowance and could be used either by a student or passed on to another family member. From then until 1996, there were only minimal changes: the value of the allowance went up somewhat, and the deductions were turned into credits (thus mostly eliminating the regressive aspect of the associated tax expenditure) as part of a major reform of taxation carried out by the Mulroney Government in 1987.

In 1996, the Government of Canada increased the value of the education credit from \$60 per month to \$80 per month. In 1997, it increased it again to \$120 and then to \$200 per month for 1998; it also allowed part-time students to enjoy partial access to the credit and incorporated mandatory ancillary fees within the ambit of the tuition tax credit. Another change allowed students to carry-forward any unused amounts of tax credits to future years, which was very beneficial for students who did not have enough income to be liable for tax. In 2000, the monthly amount doubled to \$400 per month, with a concomitant increase for part-time students. In 2006, the Government of Canada created a new Textbook Tax Credit worth \$65 per month, which worked precisely the same way the education credit did.

Until 2000, provincial taxes were calculated as a function of federal taxes. Therefore, whenever a federal tax credit was implemented, implicitly the credit reduced one's provincial tax payable as well. In 2000, the country moved from a TONT (tax-on-tax) system to a TONI (tax-on-income) one, under which provinces were given a great deal more freedom over the way taxes were calculated (e.g.

they could have different rates at different income bands) and how tax concessions could be created (e.g. they could design their own tax credits), provided they all agreed to let Ottawa both collect the taxes and define "income". A majority of provinces froze tuition tax credits at the level they were at prior to the 2000 budget (i.e. \$200 per month), and some chose to mirror the federal government's \$400 rate. Alberta and Ontario decided to do the federal government one better by matching the \$400 credit rate and then indexing the rate to inflation.

In 2015, the federal Liberals came to power with a plan to move away from tax credits as a funding mechanism. In the 2016 budget, the government eliminated the education amount and textbook tax credits, leaving only the tuition tax deduction. The money thus saved was used to pay for an increase in student grants. Ontario and New Brunswick followed suit by getting rid of their education and tuition tax credits later in starting in 2017 and similarly re-investing the proceeds in student grants and create what were effectively "targeted free tuition" programs. In 2019, after changes of government in both provinces, these new programs were eliminated; in New Brunswick, this resulted in a re-instatement of the tuition tax credit, whereas in Ontario it did not. Other provinces that have eliminated tuition and education tax credits include Alberta (2020) and Saskatchewan (2017). Quebec eliminated its education credit, but not its tuition credit, in 2012.

Another important source of tax expenditures at the federal level, albeit not a tax credit per se is the exemption of scholarship income from any taxation, which became federal policy in 2006. This exemption is now worth about 20% of the total value of federal tax expenditures.

5.2.2 Non-need-based student assistance

While need-based assistance provides targeted aid to students with low-income and/or high-need, there are billions of dollars in other forms of aid sent to students and their families without means testing. The most important of these forms of aid are tax credits and tax exemptions. As figure 5.9 shows, the value of these credits quadrupled from just over \$1 billion in 1992-93 to just over \$4 billion in 2015-16 in constant dollars. Major policy changes in the federal and Ontario programs reduced total tax expenditures by almost \$500 million in 2017-18, with most of this being turned into grants: currently, the total annual value of tax credits is estimated to be \$3.9 billion, with almost 90% of this coming from the Government of Canada.

The other important government transfer program for postsecondary education is Education Savings Grants. In 1971, the Government of Canada introduced Registered Education Savings Plans – that is, savings accounts that parents could set up for their children within which growth was not taxed. In 1998, the Government of Canada added a savings matching scheme, where it would contribute 20 cents for every dollar contributed to a RESP, up to an annual maximum of \$400 (later increased to \$500). This program, called the Canada Education Savings Grant (CESG), was very popular, and uptake increased rapidly (see figure 5.10, below). The only major change to this program since its inception came in 2004, when the government decided to address the complaint that CESGs were mostly a regressive give-away to wealthier families. First, the matching rate was increased for lower-income parents, up to 40% (this was known as the A-CESG). Second, a new program called the Canada Learning Bond was introduced. This program adds money to children's RESPs automatically if their parents' income is less than \$49,020 per year (the threshold amount adjusts upward if the family has more than three

Figure 5.9: Total Value of Education-Related Tax Expenditures to Individuals by Source, Canada, 1992 to 2025, in Millions of \$2024

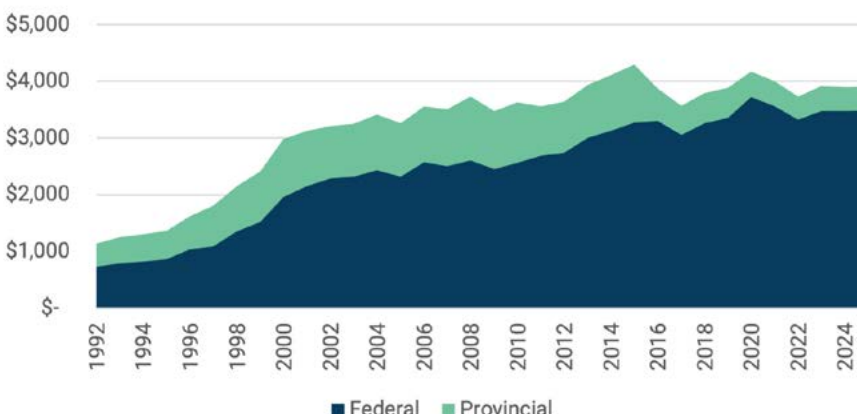
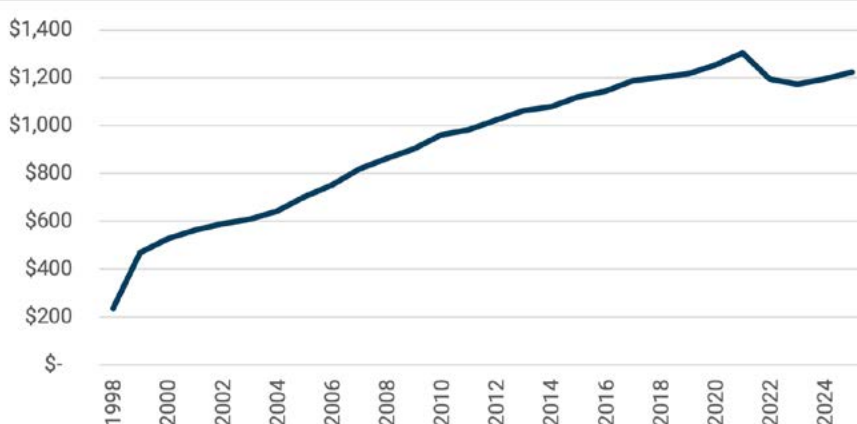


Figure 5.10: Total Canada Education Savings Grants Payments, 1998 to 2025, in Millions of \$2024



children). The first year this occurs, the child's account receives \$500; in every subsequent year this occurs until the child turns 18, another \$100 is added. Until 2024, parents needed to open an account in order for the transfer to occur, and since many did not, the program had only a mediocre take-up rate.

The success of the CESG has far exceeded its creators' expectations. In its first few years of operation, it was expected to cost \$300 million per year or so; today, thanks to high participation rates in the program, the amount is over \$1.2 billion. In 2025, 3.2 million RESP accounts received CESG and/or A-CESG payments. That is to say that 42.1% of all

Canadians under 18 received some kind of CESG payment in 2025, while another nine hundred thousand or so have a RESP in their name that did not receive a contribution that year. In the same year, 622,961 current students collectively withdrew \$7.4 billion to pay for their education. Total federal spending on CESGs since the program's inception is shown in Figure 5.10.

The final major source of funding for students is institutions themselves, which provide roughly \$3.6 billion per year in scholarship and bursary funding to students (see Figure 5.11). The overwhelming majority of this money (95%+) comes from universities rather

than colleges, in part because they have greater fundraising resources and in part because financial aid is a more important part of the enrolment management process at universities. Scholarships are perhaps the fastest-growing element of university expenditures in Canada, having increased roughly twelve-fold in real terms since 1992-93. Total university expenditure on scholarships is now over \$2,800 per FTE student. Institutions provide very little in the way of breakdown with respect to how this money is spent, so the extent to which this money is handed out based on need or merit or is supporting undergraduates vs. graduate students is largely unknown. Surveys conducted in the 2000s suggested that only about 25% of funds were going to undergraduates, and that these funds were split on roughly a 50/50 basis between merit and need-based aid. If this data is still accurate, it implies that the bulk of the funding – 75% of it – is supporting graduate students, and that institutional spending is probably something like \$700 per student annually at the undergraduate level and \$7,500 per student annually at the graduate level.

5.3 TOTAL STUDENT AID

The preceding sections have looked at the four major sources of assistance: need-based student aid, tax credits, education savings grants, and institutional scholarships. These are not quite the only sources of student aid expenditures in Canada. Among the other sources of aid are the Government of Canada payments to First Nations and Inuit students through the Postsecondary Student Support Program (PSSSP), roughly amounting to \$350 million per year, and scholarships for graduate students through the three traditional granting councils, which are roughly \$200-\$250 million per year (these sums are included in government expenditures in chapter 4, however). There are also sundry provincial merit programs, which at one point accounted for nearly \$150

Figure 5.11: Total Institutional Scholarships by Institutional Type, Canada, 1993-94 to 2024-25, in Millions of \$2024

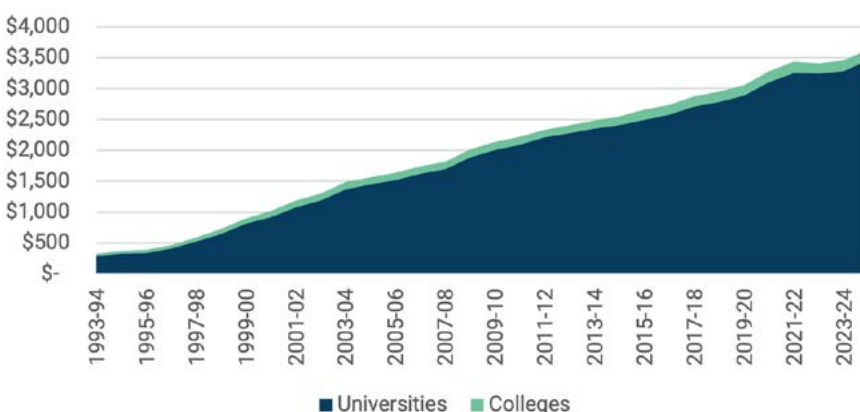
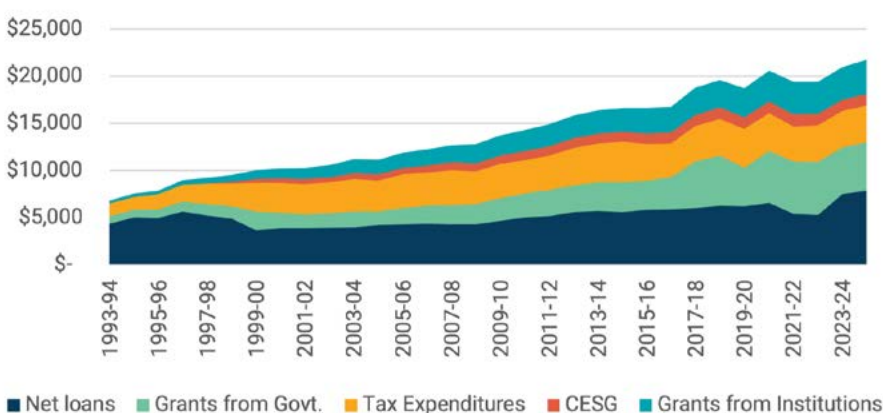


Figure 5.12: Total Student Financial Assistance by Type, Selected years, Canada, 1993-94 to 2024-25, in Billions of \$2024



million per year but have declined significantly in recent years. Provincial tax credits for graduates – which provide tax rebates to recent PSE graduates who live in a particular province – were quite popular about a decade ago and accounted for nearly \$100 million per year at their height, but as of 2021-22 only Saskatchewan maintains such a program (Quebec has a smaller version that only applies to graduates living in more remote parts of the province). Quebec also has a small program that tops-up contributions to CESG. In total, these various sources of aid add up to roughly \$1 billion/year. Also missing from the tally of other forms of aid is the one-off program of

emergency aid to students delivered in the summer of 2020 during COVID, known as the Canada Emergency Student Benefit, a subsidy that in the end worked out to be slightly under \$3 billion.

Figure 5.12 aggregates the five major sources of aid (excluding the programs noted in the preceding paragraph) to provide a near-complete picture of how student assistance has increased over the past two decades. It contains a number of important data points. First, the total amount of money given to individual Canadians has roughly tripled over the past thirty years, even after accounting for inflation. What was a \$6.8 billion/year (in \$2024) student aid



The Centre for Learning, Okanagan College, BC

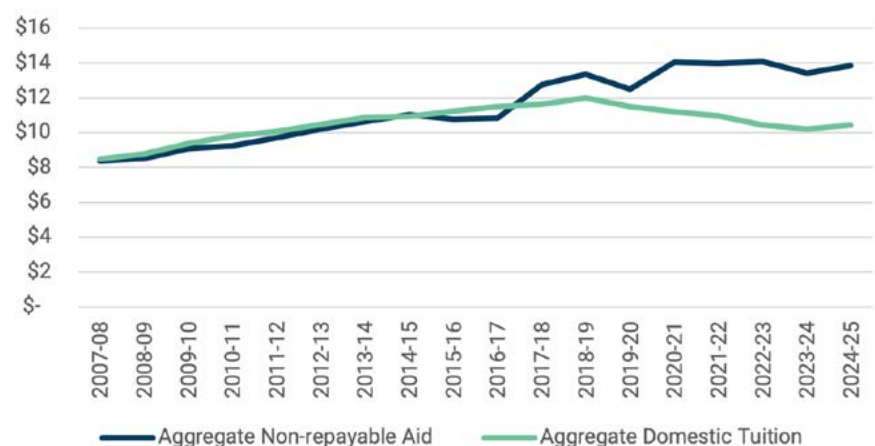
system in 1993-94 has now tripled in size to become a \$21.7 billion/year one. Second, the system is less loan-based than it used to be. In the mid-1990s, loans made up two-thirds of all student aid; by 2024-25 that figure was only 36% (that said, this figure has been rising for the past two years). Since the mid-90s, government grants have increased more than six-fold after inflation, while institutional grants have increased twelve-fold. Meanwhile, tax credits have more than doubled after inflation, and education savings grants have gone from zero to over \$1.2 billion per year. All of this represents a sea change in the way postsecondary education is financed.

The total amount of non-repayable assistance - that is, total assistance minus loans - was roughly \$13.8 billion in 2024-25: If recurring money from the additional sources not covered by figure 5.12 is included, it increases to nearly \$15 billion. As noted in chapter 3, the total amount of tuition paid by domestic students in 24-25 was about \$10 billion. Since very little student assistance is

available to international students, it is therefore possible to say that the total amount of non-repayable assistance given to Canadians each year is over \$3 billion higher than the total amount of tuition fees paid by Canadian students. Or, to put it another way, Canada likely has net-negative tuition for domestic students once various forms of student

assistance are taken into consideration. This does not mean that every student receives more in assistance than they pay in tuition, but it does mean that on average, per-student subsidies exceed per-student fees. As figure 5.13 shows, this gap between non-repayable aid and aggregate domestic tuition fees has been growing for several years.

Figure 5.13: Aggregate Non-Repayable Aid vs Aggregate Domestic Tuition fees, Canada, 2007-08 to 2024-25, in Billions of \$2024



5.4 STUDENT DEBT AT GRADUATION

The effect of all this extra financial aid is most easily seen in student debt statistics. In the late 1990s, prior to all these major aid increases, there was considerable concern that Canadian students would soon be carrying debt loads resembling students from US four-year private institutions (which, at the time, were in the neighbourhood of \$45,000 CAD in today's dollars). Average student debt loads in Canada did increase sharply in the 1990s, but since that time they have remained very constant and, by some measures, have decreased.

Two data sources allow us to look at student debt over time. The first is the National Graduates Survey (NGS), which surveys every fifth (formerly fourth) graduating class three (formerly two) years after graduation. Despite the capricious survey timetable, it remains the country's most thorough examination of graduate debt because of the large sample, which is drawn from the entire graduate cohort of both universities and colleges. The drawback is that the data can be outdated by the time it is published. This is an ongoing issue: at the time of writing in the summer of 2026, the most recent observation is from the graduating class of 2020.

The second is the Canadian University Survey Consortium's (CUSC) triennial survey of graduating students, the most recent observation having come in 2024. These have the benefit of being published almost immediately, but the drawbacks are a somewhat inconsistent sample (consortium members are not entirely standardized from iteration to iteration), the exclusion of colleges, and low participation from Quebec. The relative lack of Quebec institutions participating in the survey tends to raise national estimates of debt because of that province's lower average debt levels. Both the NGS and CUSC sources are included in figure 5.14 (CUSC data is indicated with an asterisk).

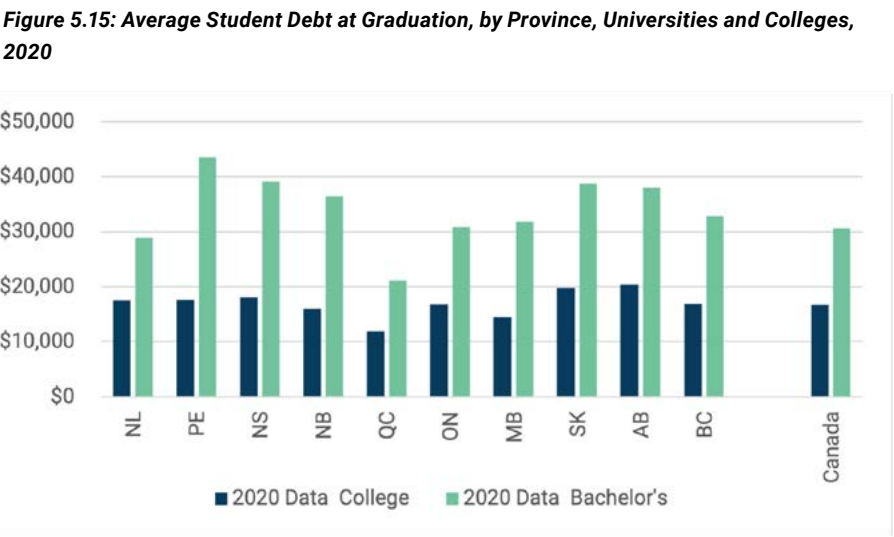
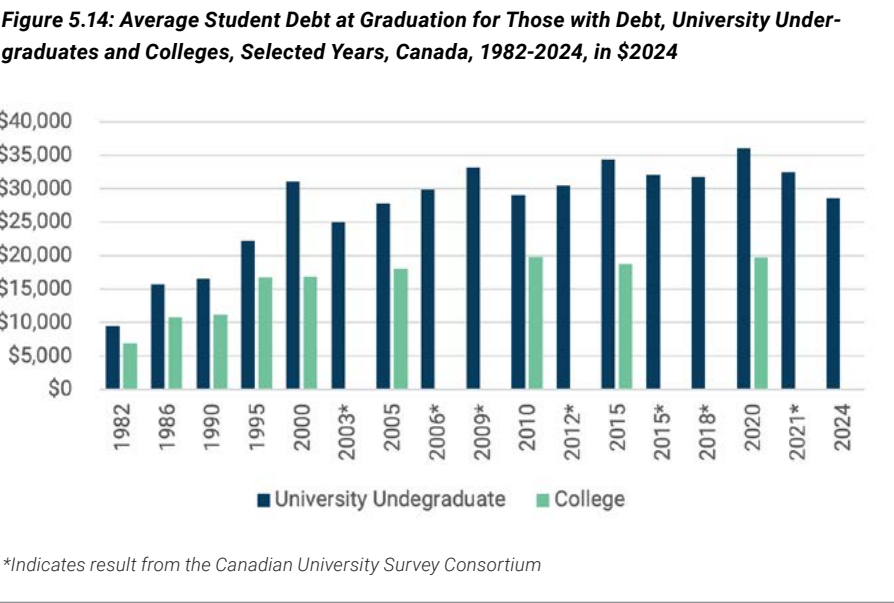


Figure 5.14 shows average student debt among those students who incurred debt. Evidence from various surveys suggests that the majority of Canadian college and undergraduate students do not incur any debt at all during their studies. The percentage of students with government debt seems to range between 30-35% for college students and 40-45% for university students; the percentage of students reporting any debt is about ten percentage points higher.

In terms of trends, debt levels at graduation increased substantially in the 1990s, but have seemingly grown very little in

real terms since 2000. Of the nine national surveys that have been undertaken since 2006, the value of undergraduate debt has mostly moved around in a relatively narrow band between \$30,000 and \$35,000, with a mean value of just over \$32,000. Thus, despite frequently heard cries of “ever-increasing student debt”, the massive increase in student aid shown in figure 5.13 has in fact brought the student debt problem relatively under control, and since 2010, we have not seen any substantial increase in average student debt. However, the increase of loan limits in the 2020s, the reduction of federal grant

maxima in 2023 and the early 2026 cuts to grants in the Ontario Student Assistance Program seem likely to drive these numbers significantly higher over the next few years.

The last instance for which we have complete data on debt at graduation for both universities and colleges is the most recent National Graduates Survey, which covered the graduating class of 2020. Figure 5.15 takes the data from this survey to look at the variation of average debt levels (among students who borrow) across the ten provinces. At the college level, debt levels are actually fairly consistent across the country, with students in most provinces having debt at graduation close to the national average of \$16,700 (the exceptions are Manitoba and Quebec on the low side and Alberta on the high side). In contrast, the spread of debt levels between provinces for university graduates is quite wide. Nationally, the average is about \$32,000, but in Prince Edward Island students graduate with over \$43,000 in debt, while in Quebec it is less than half that. In Nova Scotia, New Brunswick, Alberta, and Saskatchewan, average debt at graduation is over \$35,000.

Data from the last National Graduates Survey can also be used to look at student indebtedness by ethnicity. Figure 5.16 shows incidence of borrowing for the graduating class of 2020, combined for all graduates of universities and colleges, for the eight largest ethnicities covered by the NGS. Students of different ethnicities participate in public student loan programs at quite different rates; among Arab students, more than half graduate with government student debt, while fewer than 20% of South Asian students do the same. However, students can also borrow from banks (usually with a co-sign from a relative) and from family sources and when these sources of debt are included, the gaps between ethnic groups narrow somewhat, though there remains a gap of about twenty percentage points

Figure 5.16: Incidence of Borrowing, College and University Graduates Combined By Ethnicity, Canada, Class of 2020

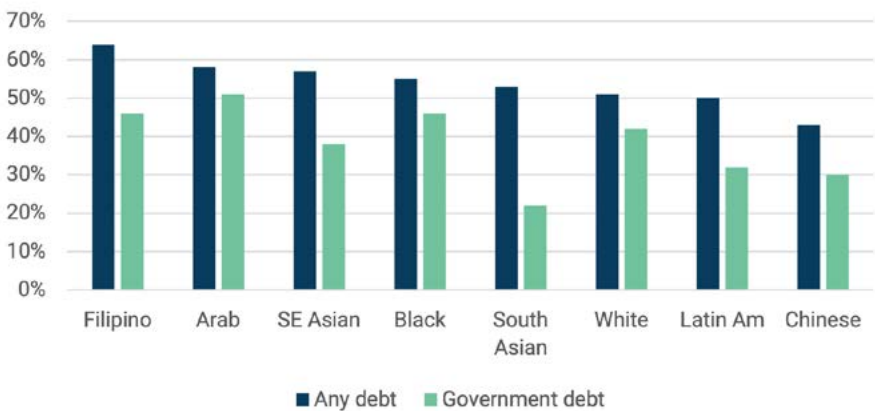
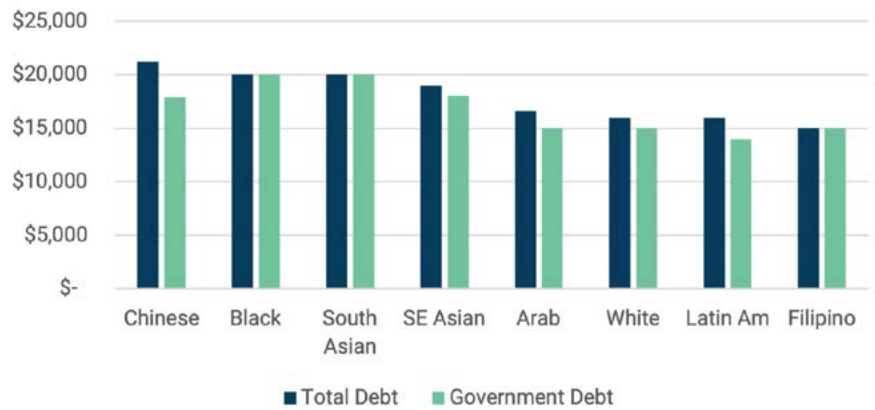


Figure 5.17: Median Borrowing, College and University Graduates Combined By Ethnicity, Canada, Class of 2020



between the borrowing rates of the group least likely to borrow (Chinese, 43%), and the one most likely to borrow (Filipino, 64%).

Figure 5.17 shows median levels of indebtedness among students with debt (i.e., students who did not incur debt are excluded from the calculation), by ethnicity, for the graduating class of 2020. Here the picture is basically the inverse of figure 5.16. Median indebtedness ranges from \$15,000 for the group with the highest rates of indebtedness (Filipinos) to \$20,000 for the group with the lowest rates of indebtedness (Chinese). This data needs to be

interpreted with some caution. Levels of indebtedness are only partly an indicator of lack of means; they are also an indicator of length of period of studies. So, the low levels of median debt among Filipinos and Latin American students may be an indicator that they do not need much extra funding or it may be an indicator that they are more likely than others to be enrolled in shorter-duration college programs. Similarly, higher levels of median indebtedness among Chinese, Black and South Asian students might be an indicator of greater financial need, or it might be an indicator that these groups are more likely to enrol in longer bachelor's-level programs.

CHAPTER SIX

Graduation, Attainment, & Graduate Outcomes

06

KEY POINTS

- ▶ Canada has one of the highest postsecondary attainment rates in the world.
- ▶ Postsecondary attainment rates are rising over time, thanks to rising university enrolments and completions.
- ▶ Completion rates at university are close to 75% on a six-year window; college completion rates are below 60%.
- ▶ Data from Ontario suggests that the overall employment picture for graduates has been improving for several years, but that the transition to “good” jobs is taking longer than it used to.
- ▶ Nationally, data indicate that average inflation-adjusted graduate salaries fell slightly between 2010 and 2020 in both universities and colleges. The drop in salaries was most pronounced in Alberta, Saskatchewan, and Newfoundland, the three provinces whose economies are most dependent on oil and gas.

Graduation, Attainment, & Graduate Outcomes

For most students, post-secondary education is primarily a means of getting a degree and a better job. From the perspective of the state, it is a means for increasing labour market participation and productivity. Employment is not the only rationale for higher education – certainly, there are other, less utilitarian ones – but it is the primary one for the state and students alike. This section examines postsecondary education in terms of graduation rates, attainment rates, and labour market outcomes.

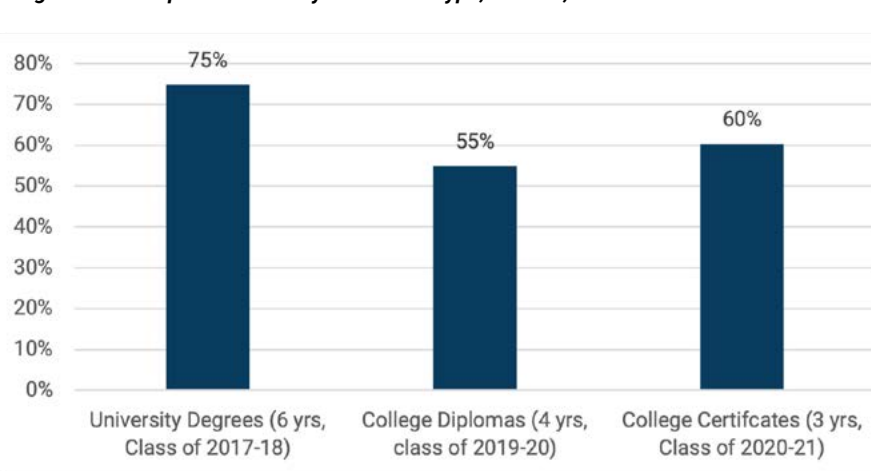
6.1 GRADUATION RATES

Graduation rates are difficult to calculate in any country at a system-level. In theory, the calculation is relatively simple: what percentage of students who start a program receive a credential? In practice, though, this is a difficult question to answer. A host of definitional problems and technical challenges are involved in tracking graduation rates. If a student switches from one program to another, does the completion still count? What about from one institution to another? Is the national statistical system capable of tracking students from one institution to another so that a student is not erroneously counted as a drop-out for moving from one institution to another? And then there is a key methodological question: how many years does one wait before ceasing to follow a student through the system and declaring them “non-completers”?

Canadian data on graduation has improved significantly in recent years due to enhancements in the Post-Secondary Student Information System (PSIS). The best and most current data available on completion rates, shown

below in figure 6.1, come from a series of analyses done by Statistics Canada that look at cohorts that entered postsecondary education in the mid-to-late 2010s. For the most recent cohorts of students under 20 who have begun postsecond-

Figure 6.1: Completion Rates by Credential Type, Canada, Most Recent Cohorts

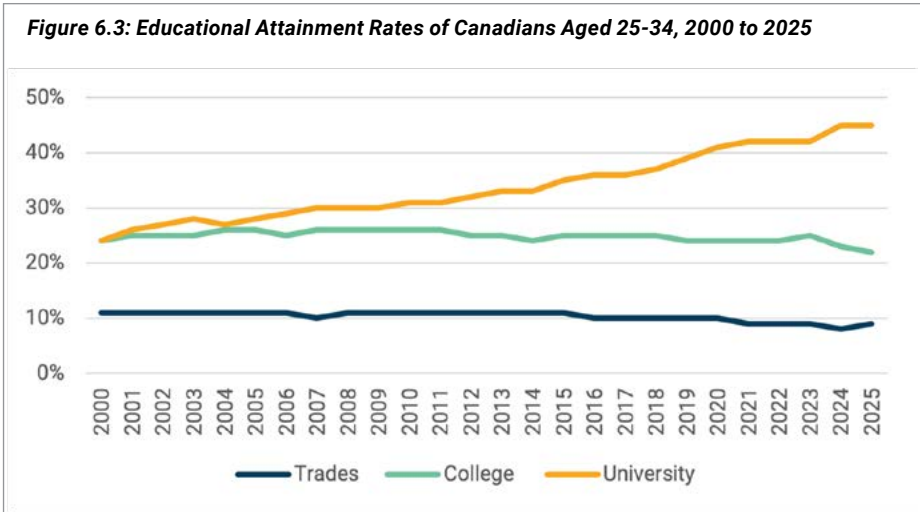
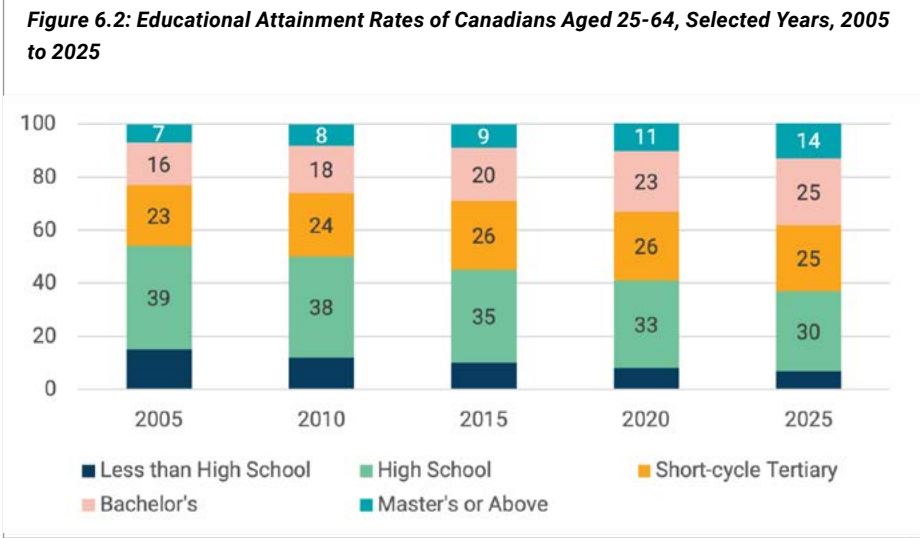


ary education for whom outcomes can be tracked longitudinally, the 6-year graduation rate from four-year programs (i.e. undergraduate programs) was 75%, the four-year rate for college diplomas was 55%, and the three-year graduation rate for shorter postsecondary certificates was 60%. These could all be slight undercounts, as they only include students who graduated with a qualification at the same level as the program in which they started (i.e. someone who started in an undergraduate program but switched to a diploma would be counted as a non-completer; it also excludes anyone who switched provinces to study after starting a program). The rates of graduation for four-year programs have stayed roughly similar in recent years while those for diplomas and certificates have fallen somewhat.

6.2 ATTAINMENT RATES

Graduation rates measure the percentage of students who complete their programs; attainment rates measure the percentage of citizens who have achieved a given level of education. A high level in one does not necessarily mean a high level in the other; even jurisdictions with low levels of access and completion might have quite high levels of attainment, if they were able to attract educated individuals via immigration from abroad or elsewhere in Canada.

Figure 6.2 shows the highest level of educational attainment among Canadians aged 25-64.¹ It shows a clear upward trend over time. In 2005, only 46% of working-aged Canadians had a college or university credential of some kind. By 2024, that figure had risen to 64%. Attainment at all post-secondary levels increased: working-aged Canadians with college credentials increased from 23 to 25%, those with bachelor's degrees from 16 to 25%, and those with



graduate degrees from 7 to 14%. This change is partly due to less-educated older individuals aging out of the labour-market, partly to decades of strong post-secondary participation, and partly to decades of a national immigration policy that favours high levels of education among immigrants.

While Figure 6.2 provides a portrait of working-aged Canadians as a whole, it is also possible to examine more narrowly the attainment levels of younger Canadians, which more closely reflects education levels among recent graduat-

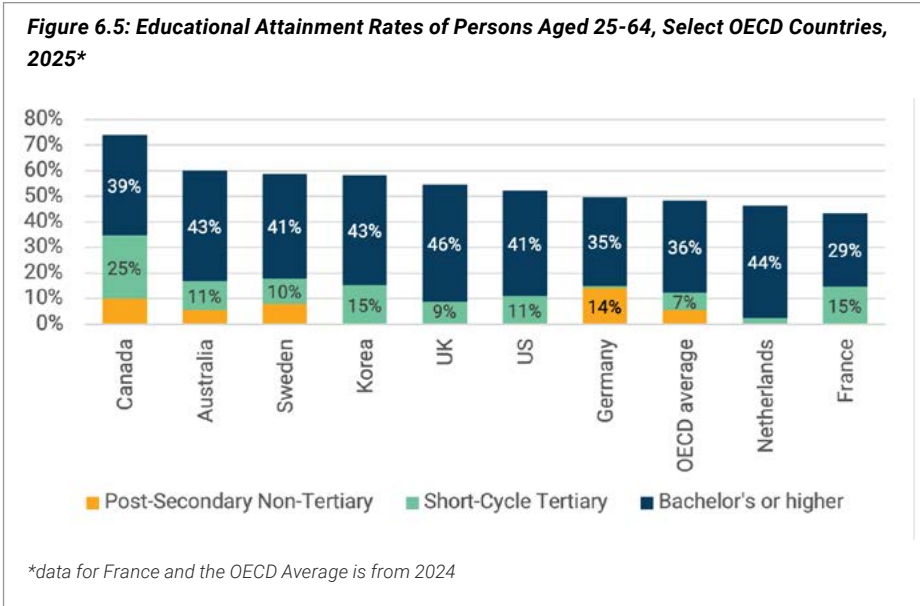
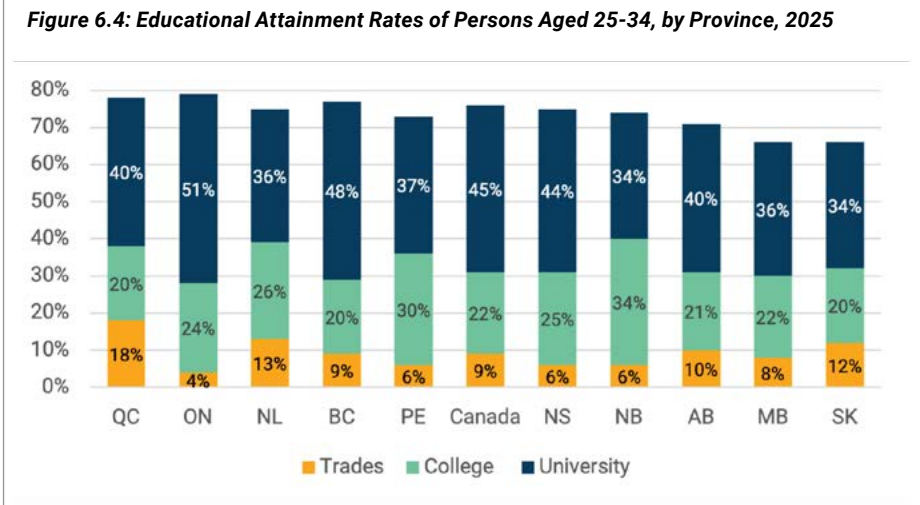
ing cohorts. Figure 6.3 demonstrates the role that increasing university attendance rates are playing in the changing labour force composition. This figure looks specifically at credentials above the level of high-school: “Trades” (what Statistics Canada calls “post-secondary non-tertiary,” which is not exactly equivalent but close enough), “College” (which is equivalent to “short-cycle tertiary” in the previous graph), and “university” (combines the “bachelor’s and “master’s and above” categories in figure 6.2). Among Canadians aged 25-34, the proportion of Canadians with

1 Statistics Canada assigns a hierarchy to credentials that places college certificates and diplomas “below” those of university credentials. Thus, even if an individual received a bachelor’s degree and subsequently studied for and received a college diploma or certificate, their “highest” degree would still be a bachelor’s. Many in the college sector understandably disagree with this stance; nevertheless, due to the data source, it is the only definition available, and it is therefore the one used in this report.

trades and college credentials either stayed constant or fell slightly between 2000 and 2025, with most of the fall happening since the turn of this decade. However, the percentage of people with bachelor's degrees or higher increased from 24% to 45%. Some of this increase is due to immigration; most of it, though is the result of increasing rates of university enrolment over the past three decades, as demonstrated back in Chapter 1.

Figure 6.4 shows the educational attainment of 25- to 34-year-olds by province. As of 2025, attainment rates in Canada's three largest provinces are all above the national mean, while all other provinces lie below – substantially so in the cases of Manitoba and Saskatchewan. The specific combination of trades, college and university credentials varies from one province to another. Trades are particularly predominant in the attainment mix in Quebec, Newfoundland and Labrador, and Saskatchewan; colleges are particularly prominent in the Prince Edward Island and New Brunswick; university degrees are especially important in British Columbia, Ontario, and Nova Scotia. Note that this does not necessarily say very much about the relative importance of each sector in each province; Alberta and British Columbia have comparatively small university systems but high university attainment rates due mainly to an influx of immigrants, either from other provinces or other countries.

According to the Organization for Economic Co-operation and Development (OECD), Canada is the world leader in postsecondary educational attainment, with 74% of 25 to 64-year-olds holding some kind of postsecondary credential compared to an OECD average of 48%. Canada achieves this mainly by having the largest proportion of its population with some kind of sub-baccalaureate diploma or certificate. These are split between what are known as “post-secondary non-tertiary” and “short-cycle tertiary,” which as in figure 6.3 above can be thought of very



roughly as “trades” and “colleges”. At the level of bachelor’s programs and above, Canada is much closer to the OECD average, with 39% of 25 to 64-year-olds having a bachelor’s degree or higher. Across the OECD, the comparable figure is 36%, and in a number of comparator countries the figure is over 40%. This data is represented in Figure 6.5.

6.3 LABOUR MARKET OUTCOMES

One of the key outcomes of higher education is graduate performance in the labour market. Of course, this is not the only purpose of higher education, but

it is the primary one for both governments and students. Canada was one of the first countries to produce a high-quality national survey of graduates back in 1978, and it has continued with a similar survey format every four or five years until 2005. Unfortunately, the reporting format changed for the class of 2010—students were interviewed three years after graduation instead of two—meaning that we cannot accurately compare data from the last two surveys to the previous seven, and this makes constructing a useful time-series difficult. The 2020 survey can partially examine outcomes at the 2-year level because of data matching with other Statistics Canada databases through the



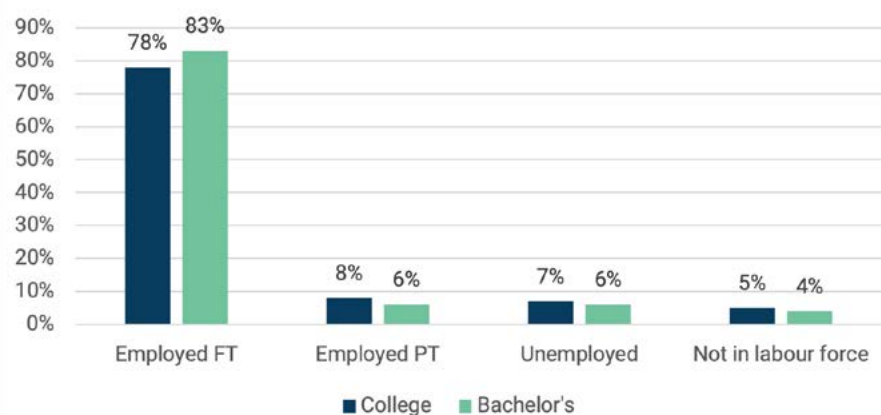
Werklund Agriculture and Technology Centre, Olds College, AB

Employment and Labour Market Longitudinal Platform, but the time series is still broken. Meanwhile, annual or biennial surveys exist in British Columbia, Alberta, Ontario, and Quebec, and there is a similar joint effort in the Maritime provinces, but they all ask slightly different questions at different times and issue slightly different public reports. Thus, while we know a great deal about graduate employment in Canada, it is not always easy to summarize nationally because of difficulties in compilation and comparison.

Figure 6.6 shows employment rates among all Canadian graduates from the class of 2020, three years after graduation. The rates do not vary a great deal across sectors: at that distance from graduation, the employment rates for universities and colleges are almost identical, at about 90%, with the overwhelming majority in full-time employment. They also do not change very much over time: these results are virtually the same as the ones from 2010.

Provincial surveys usually report employment rates at shorter intervals than the 3 years used in the National Graduates Survey. Instead, they measure results at

Figure 6.6: Employment Status by Level of Education Completed, Canada, Class of 2020, Three Years After Graduation



6, 18, and/or 24 months, depending on the jurisdiction and level of education. These data cannot be aggregated to show a single natural picture, though they indicate similar general trends. Figure 6.7 uses data from Ontario, a province that contains a little over 40% of Canada's total university graduates, and presents reported employment rates 6 and 24 months after graduation. Transitions to the labour market seem to be taking longer now than they did twenty years ago. The rate of employment after six months dropped quite

significantly for those classes that graduated into the recession of 2008-9 and took about seven years to recover. For employment rates after two years, however, the drop was not quite as precipitous and bounced back somewhat after that recession, though it never quite regained its earlier heights (the substantial drop at 2 years for the 2018 cohort and 6 months for the 2020 cohort reflects the impact of the COVID pandemic on new graduates). Similar patterns can be seen in most of the rest of the country, with the exception of

Alberta, where the oil boom that lasted for most of the period from 2006-14 produced quite a different set of outcomes, particularly for students graduating with college/polytechnic credentials that allowed them to work in the oil/gas and construction industries.

When it comes to graduate incomes, data collected by Statistics Canada show that two and five years after graduation, the median bachelor's graduate has an annual income, in constant \$2024, of \$61,400 and \$73,300, respectively, whereas for college diploma graduates, the equivalent figures are \$46,600 and \$53,300 (see figures 6.8 and 6.9). However, there are some significant provincial variations. Among bachelor's degree holders, graduates from the three "oil" provinces of Saskatchewan, Alberta, and Newfoundland and Labrador earned significantly more than graduates from other provinces; at the college level, Saskatchewan had far and away the best results, with the other two oil provinces and British Columbia not far behind. These differences are unlikely to be a reflection on the quality of institutions in various provinces; rather, they reflect the opportunities available to young graduates in different parts of the country in the mid-to-late 2010s. These can change over time: in the 1990s, Newfoundland and Labrador and Saskatchewan were below the national average, and Ontario was well above it. Given the long-term decline in oil prices since 2015, it would not be a surprise if the pattern of graduate salaries at the provincial level were to change again once data from the back half of the decade becomes more available.

Figures 6.8 and 6.9 show how outcomes improve for graduates as they get further out from graduation. Figures 6.10 and 6.11 are similar in appearance but show how median salaries three years after graduation have changed over time, in constant \$2024, for bachelor's graduates and college graduates, respectively. As in the previous graphs, there is an evident gap in earnings between university and college graduates in all

Figure 6.7: Employment Rates at Six Months and Two Years, Ontario Undergraduates, Graduating Classes of 1996 to 2020

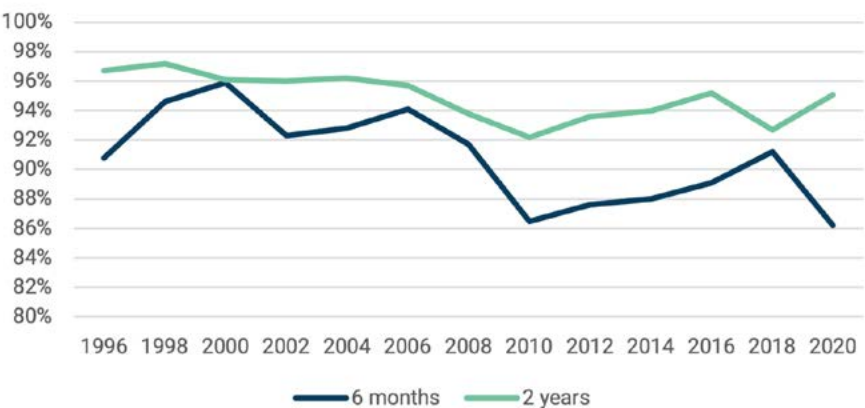
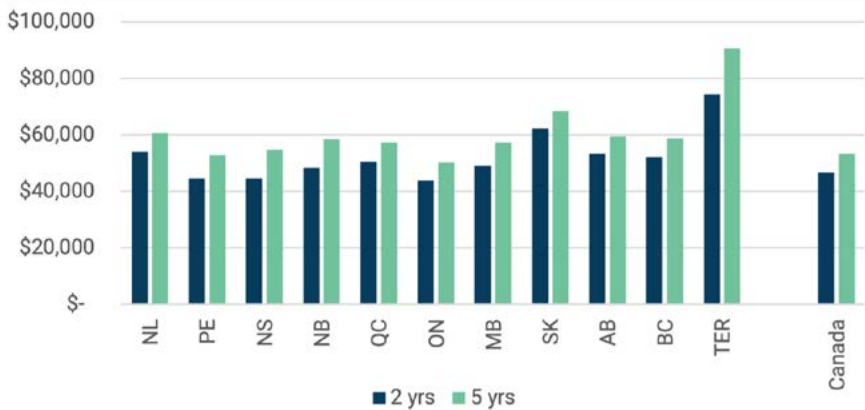


Figure 6.8: Median Graduate Incomes Two and Five Years After Graduation, Bachelors Graduates, Canada, Class of 2019, in \$2024



Figure 6.9: Median Graduate Incomes Two and Five Years After Graduation, College Diploma Graduates, Canada, Class of 2019, in \$2024



provinces. More interesting, perhaps, is the change in the pattern of earnings between 2010 and 2020. In both the college and university sectors, we see that when adjusted for inflation, average salaries have fallen slightly over the decade. This trend holds true with only a couple of exceptions across all provinces. However, the biggest proportionate falls in graduate income by far happen in the provinces whose economies are most dependent on hydrocarbons: Alberta, Saskatchewan, and Newfoundland and Labrador. To be clear, the relationship between falling salaries and falling oil/gas prices is more indirect than direct. The fall in incomes in these provinces was not so much a matter of declining employment in lucrative gas and petroleum industries, as it was that in the 2010s, general economic buoyancy meant wages across the board rose due to a scarcity of labour. That is to say, it was not just Engineering graduates that saw the benefit of a commodity supercycle, but Arts graduates as well: and the end of that cycle hit graduate earnings right across the spectrum.

Data from Ontario also allow a more detailed look at graduates' incomes by field of study. Figure 6.12 shows that most fields of study saw some decline in real salaries for graduates between the classes of 2004 and 2014, with engineering and, to a lesser extent, business

Figure 6.10: Median Salaries Three Years After Graduation, by Province of Study, Bachelor's Graduates, Canada, Classes of 2010 and 2020, in \$2024



Figure 6.11 Median Salaries Three Years After Graduation, by Province of Study, College Graduates, Canada, Classes of 2010 and 2020, in \$2024

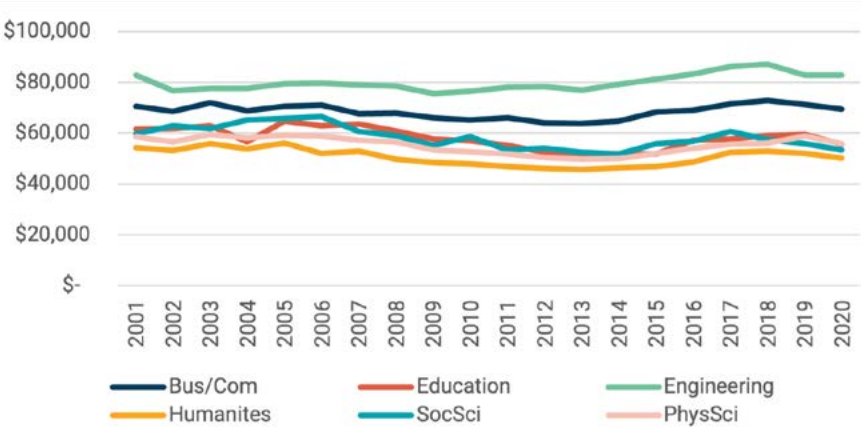


Zibiing Indigenous Landscape Project, University of Toronto, ON

being the only exceptions. All the other major fields—education, humanities, physical sciences and social sciences—saw declines in graduate incomes of between 15 and 20% over that decade. The physical sciences are particularly interesting: while many commentators claim that jobs in “STEM” (Science, Technology, Engineering and Mathematics) are the ones that most obviously lead to high-paying jobs, this does not seem to be entirely true in Ontario, at least with respect to science: incomes in the physical sciences are actually quite similar to those in humanities and social sciences. Overall, salaries dipped in the late aughts and early 10s as the labour market struggled to absorb the large influx of new graduates after the expansion of universities around the turn of the century, but salaries then began rising in all fields of study in the latter half of the 2010s. A cross-field decline in salaries for the graduating classes of 2019 and 2020 is likely attributable to the economic effects of COVID.

Data from Ontario also allow a more detailed look at graduates’ incomes by field of study. Figure 6.12 shows that most fields of study saw some decline in real salaries for graduates between the classes of 2004 and 2014, with engineering and, to a lesser extent, business being the only exceptions. All the other major fields—education, humanities, physical sciences and social sciences—saw declines in graduate incomes of between 15 and 20% over that decade. The physical sciences are particularly interesting: while many commentators claim that jobs in “STEM” (Science, Technology, Engineering and Mathematics) are the ones that most obviously lead to high-paying jobs, this does not seem to be entirely true in Ontario, at least with respect to science: incomes in the physical sciences are actually quite similar to those in humanities and social sciences. Overall, salaries dipped in the late aughts and early 10s as the labour market struggled to absorb the large influx of new graduates after the expansion of universities around the turn of the century, but salaries then began

Figure 6.12: Graduate Salaries Two Years After Graduation, Ontario Undergraduates, Selected Fields of Study, Graduating Classes of 2001 to 2020, in \$2023



rising in all fields of study in the latter half of the 2010s. A cross-field decline in salaries for the graduating classes of 2019 and 2020 is likely attributable to the economic effects of COVID.

With respect to international comparisons of higher education outcomes, good apples-to-apples comparisons with respect to graduate outcomes

across countries are challenging to find, because the labour market structure and the actual opportunities available to graduates differ across countries. As a result, the OECD has a different way of showing comparative graduate outcomes, which is tracking the “premiums” that university or college graduates have over upper secondary school graduates of the same age in terms of earned income.



King Campus, Seneca Polytechnic, ON



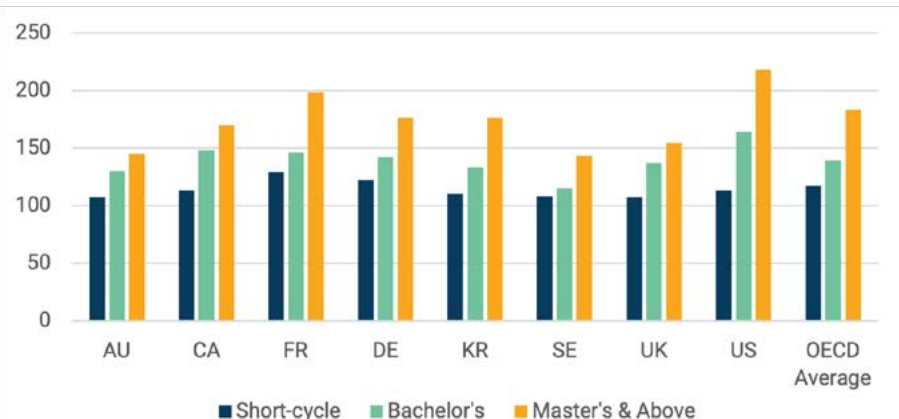
Museum of Anthropology, University of British Columbia, BC

Figure 6.13 shows the wage premiums for “short-cycle tertiary”, “bachelor’s,” and “master’s and above” certifications among labour market participants aged 25-64 for selected OECD countries. Apart from France and Germany, short-cycle tertiary graduates tend to have very low wage premiums across the OECD. Returns to bachelor’s degrees are highest in Canada and the United States, while returns on and graduate degrees are highest in France and the United States. This provides some rationale for the US practice of high university tuition fees, because they provide a method of capturing some of these eventual high private returns. Similarly, the Swedish practice of charging low tuition fees is consistent with the fairly low financial returns to degrees. However, fee policy in the German system—high-ish private benefits combined with no fees—is counter to trend observed in other

countries. Canada’s position has changed somewhat in the past few years, from being generally in the middle of this group of countries to among its better performers, at least at the bachelor’s level and above. It is unclear,

however, if this improvement is due to improving labour market performance among university graduates or deteriorating performance of high school graduates.

Figure 6.13: Salaries of Graduates aged 25-64, by Type of Credential, Select OECD Countries (Salaries of Upper Secondary Graduates aged 25-64 = 100), 2023



CHAPTER SEVEN

Research

07

KEY POINTS

- ▶ Canada has among the lowest levels of research and development spending in the OECD, and contrary to recent global trends, spending in this area continues to decline.
- ▶ The proportion of all research performed in the higher education sector is among the highest in the OECD. This is as much a consequence of business sector weakness on research as it is a sign of strength in the higher education sector.
- ▶ Among Canadian universities, there is a clear institutional hierarchy of research intensity, with the University of Toronto at the top and the University of British Columbia and McGill University not far behind. Beyond that, several institutions can claim to be near the top depending on the field of study and metrics employed.
- ▶ Canadian colleges are also engaged in applied research, albeit on a much smaller scale than universities. Though polytechnics are often seen as the biggest players in this field, fewer than half of the top ten colleges by research income are members of Polytechnics Canada.

Research

Research and Development (R & D) is a key input into any country's system of innovation, which in turn is key to a country achieving certain levels of productivity and improved standards of living. Due to weak private-sector investment in R & D, Canada's system of innovation is unusually dependent on what happens in the higher education sector. This chapter looks at how Canada fares comparatively on an international scale with respect to research input and output, the areas of research in which Canada as a country excels, as well as the areas in which Canadian universities and colleges excel.

7.1 NATIONAL-LEVEL RESEARCH PERFORMANCE

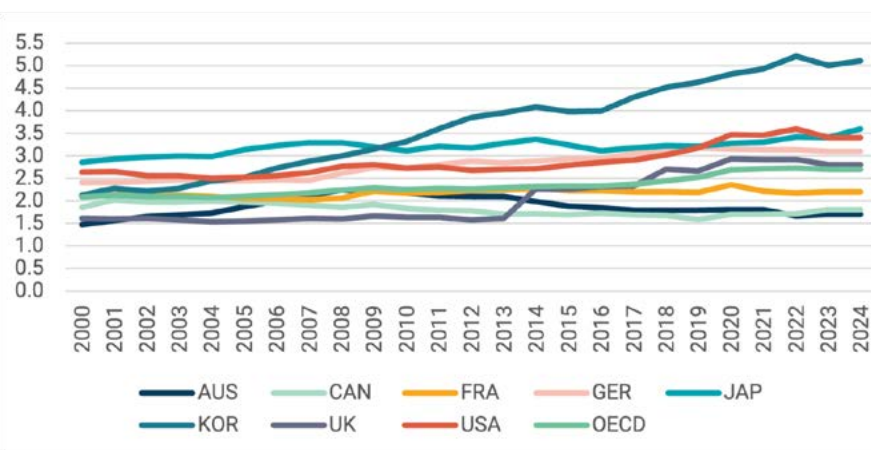
Historically, Canada has underinvested in R&D in comparison to its global peers. A variety of explanations have been posited for this phenomenon. One theory—perhaps more persuasive in the 20th century heyday of manufacturing than in the 21st—posits that Canada is a “branch plant economy,” where mainly US-headquartered companies are likely to choose to locate manufacturing and assembly operations rather than for product development. Another theory, stretching back to Harold Innis’ staples thesis, locates the deficiency in the resource-driven nature of Canada’s economy, since this sector tends to have lower levels of R&D spending than does manufacturing. Still another theory contends that Canadian companies lack ambition; since business investment in R&D is to some degree correlated with firm size and industry position, the paucity of companies that are truly global or that even have pretensions to be so is a key factor here. None of these

theories comprehensively explain Canada’s lacklustre performance, but all have some resonance.

In recent years, Canada has bucked the OECD-wide trend of rising R&D expenditures, thereby exacerbating historical disadvantages in this area. Figure 7.1 shows R&D expenditures as a percentage of GDP in Canada and select OECD

countries. It demonstrates vividly both how the country’s R&D performance is below the OECD average and how it has eroded over time. In fact, Canada is one of only two countries in the OECD with over one million people that had lower R&D spending in 2024 than in 2000 (the other was Sweden, which spends roughly twice what Canada does on R&D as a percentage of GDP). Canada now lies

Figure 7.1: Research and Development Spending as a Percentage of Gross Domestic Product, Select OECD Countries, 2000 – 2024



equal to Australia in being the lowest OECD spender on R&D. Meanwhile, every other country in this sample has seen at least some growth in Research & Development expenditure. The growth has been most spectacular in Korea, where expenditure has more than doubled from 2.1% of GDP to over 5% of GDP in just 25 years. The United Kingdom also shows significant growth, although this is mainly because of a change in national reporting methodology.

In developed countries, the bulk of expenditures on research & development come from the corporate sector, which in the parlance of international statistics is known as Business Expenditure on Research and Development, or BERD. But substantial amounts of research and development take place in the higher education sector (Higher Education Expenditure on R&D (HERD)), as well as in the government sector (Government Expenditure on R&D (GovERD)). Figure 7.2 contrasts the overall size and composition of R&D spending in Canada to those of select OECD comparators. While it is clearly the case that Canada lags most of the rest of the OECD both in overall spending and particularly in BERD, it compares quite favourably to other countries with respect to HERD spending, where it is joint-top of this group along with the United Kingdom. Whether this is a good thing or not depends on one’s point of view: it might indicate that Canada has a supportive ecosystem for funding research in the public sector, or it might indicate that the country is forced to spend more public money on research in public higher education institutions because BERD is so anaemic. Or both.

Turning to the issue of scientific output, overall, Canadian scholars are responsible for approximately 1.9% of global scientific output. For a country that contains less than 0.5% of the global population and makes up only 1.2% of the global GDP, this can be seen as an above-average performance. But this overperformance does not occur equally across all areas of study. Canada’s average is mostly

Figure 7.2: Research and Development Spending by Performing Sector, as a Percentage of Gross Domestic Product, Select OECD Countries, 2024

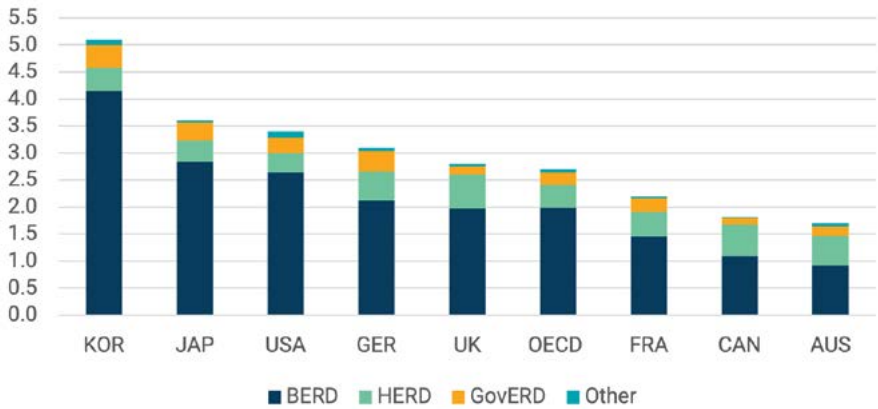
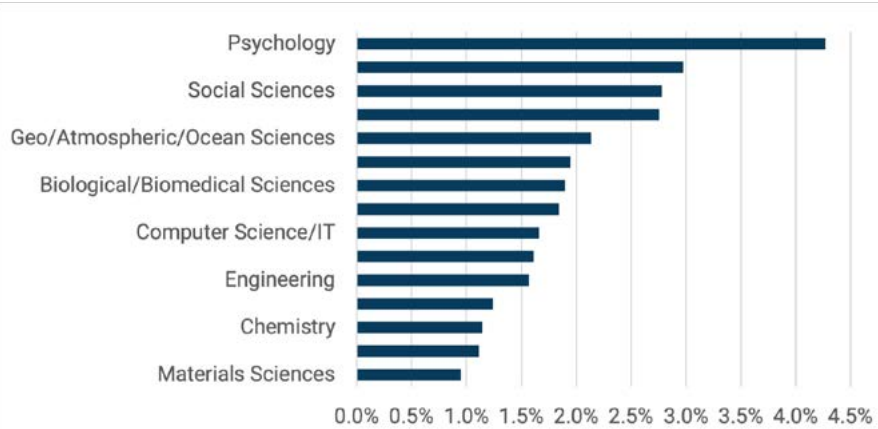


Figure 7.3: Canada’s Share of Total Global Scientific Publications, by Field, 2023



L.R. Wilson Hall, McMaster University, ON

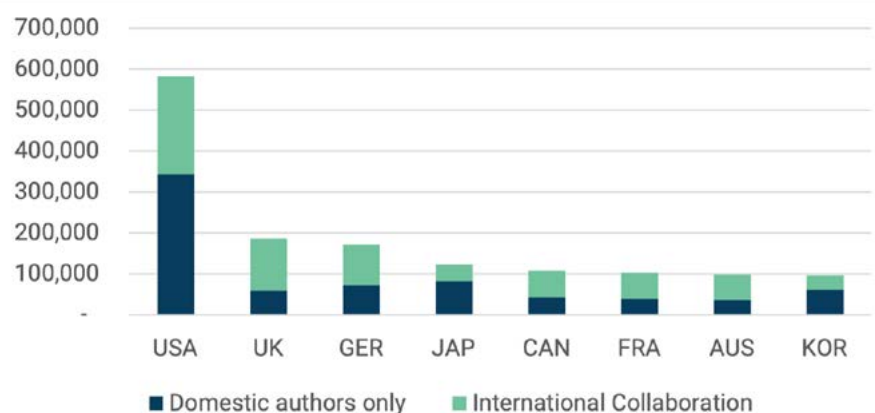


Bergeron Centre for Engineering Excellence, York University, ON

pulled up by overperformance in just six fields: psychology, natural resources/conservation, biological and biomedical sciences, geo/atmospheric/ocean sciences, health sciences, and social sciences (though to be fair the last two areas are also the two largest subfields in global science). All this said: Canada's global share of research papers – along with those of many OECD countries – has been dropping significantly over the past decade as output from middle- and lower-income countries has expanded dramatically.

The positive HERD data shown in figure 7.2 provides some context for why Canada performs well in research output as measured by total publications, a measure that mostly tracks research activity in the higher education sector, even while it lags other countries in total R & D expenditures. While not part of the most scientifically elite group of nations such as the USA, China, the UK, and Germany, Canada's total publication output is reasonably similar to that of countries like Australia and France, the latter of which is a significantly larger country with much higher levels of absolute research expenditure. One of the reasons that Canada punches above its weight in scientific publications is the

Figure 7.4: Total Scientific Publications, by Geography of Collaboration, Select OECD Countries, 2024



degree to which its scientists collaborate with colleagues in other countries. As Figure 7.4 indicates, in 2024 nearly 60% of scientific publications with a Canadian author also had an international co-author.

7.2 ACADEMIC RESEARCH AT CANADIAN UNIVERSITIES

National higher education systems tend to stratify sharply based on research intensity. Every country has at least one or two “flagship institutions,” or, in the

case of more developed nations, larger groups of universities that dominate the national research enterprise. In Canada, this group is known as the “U15”, a group of fifteen mostly quite large institutions that together account for roughly three-quarters of the sector's research expenditures. However, the U15 does not have objective membership criteria, and several inclusions and exclusions from this group appear to be based more on regional politics than any objective metrics. Certainly, there are significant disparities in research inputs and outputs within this group, and the bottom three

or four performers are a long way from the top of the group in terms of output.

There are multiple ways to measure research performance and intensity, but nearly all of them converge on the same insights: that Canada has an undisputed “top” university (the University of Toronto), a pair of very high-performing institutions that are not far behind (the University of British Columbia and McGill University) and then three more institutions that can probably be included as part of the country’s group of “world-class” institutions (Alberta, Montreal, and McMaster). Table 7.1 shows how these six institutions were ranked for 2026 by the three major global ranking systems: the Academic (Shanghai) Ranking of World Universities, the Times Higher Education (THE) World Rankings and the QS World University Rankings.

The major rankings systems also rank institutions based on broad “fields of study” (Times Higher), and “subjects” (QS and Shanghai). These rankings differ in their methodology, including how fields and subjects are distinguished from one another, but to the extent they cover research outputs, the rankings are based on how the institution fares in journals attached to specific fields/subject areas rather than on how a specific academic unit performs. Of these rankings, the one that is arguably the most statistically ‘reliable’ - mainly

Table 7.1: Top Canadian Universities According to Major Rankings Agencies, 2025

	 SHANGHAI RANKING		 THE WORLD UNIVERSITY RANKINGS		 QS WORLD UNIVERSITY RANKINGS	
	SHANGHAI		TIMES HIGHER		QS	
	Canadian Rank	Global Rank	Canadian Rank	Global Rank	Canadian Rank	Global Rank
Toronto	1	24	1	21	2	29
UBC	2	54	3	45	3	40
McGill	3	73	2	41	1	27
McMaster	4-5	101-150	4	116	8	173
Alberta	4-5	101-150	5	119	4	94
Montreal	6-7	151-200	6	150	7	168

because it eschews the use of surveys of academics - is the Shanghai Academic Ranking of World Universities. The map in Figure 7.5 shows where Canadian universities have managed to achieve global top 100 subjects. As the map makes clear, these top-ranked disciplines are overwhelmingly concentrated at the University of Toronto, and to a lesser extent UBC and McGill, though there are quite a number of universities which have world-class output in at least one or two subjects.

The Centre for Science and Technology Studies (in Dutch, CWTS) at Leiden University in the Netherlands publishes an annual world ranking of institutions based solely on publication data and is an invaluable way of monitoring changes

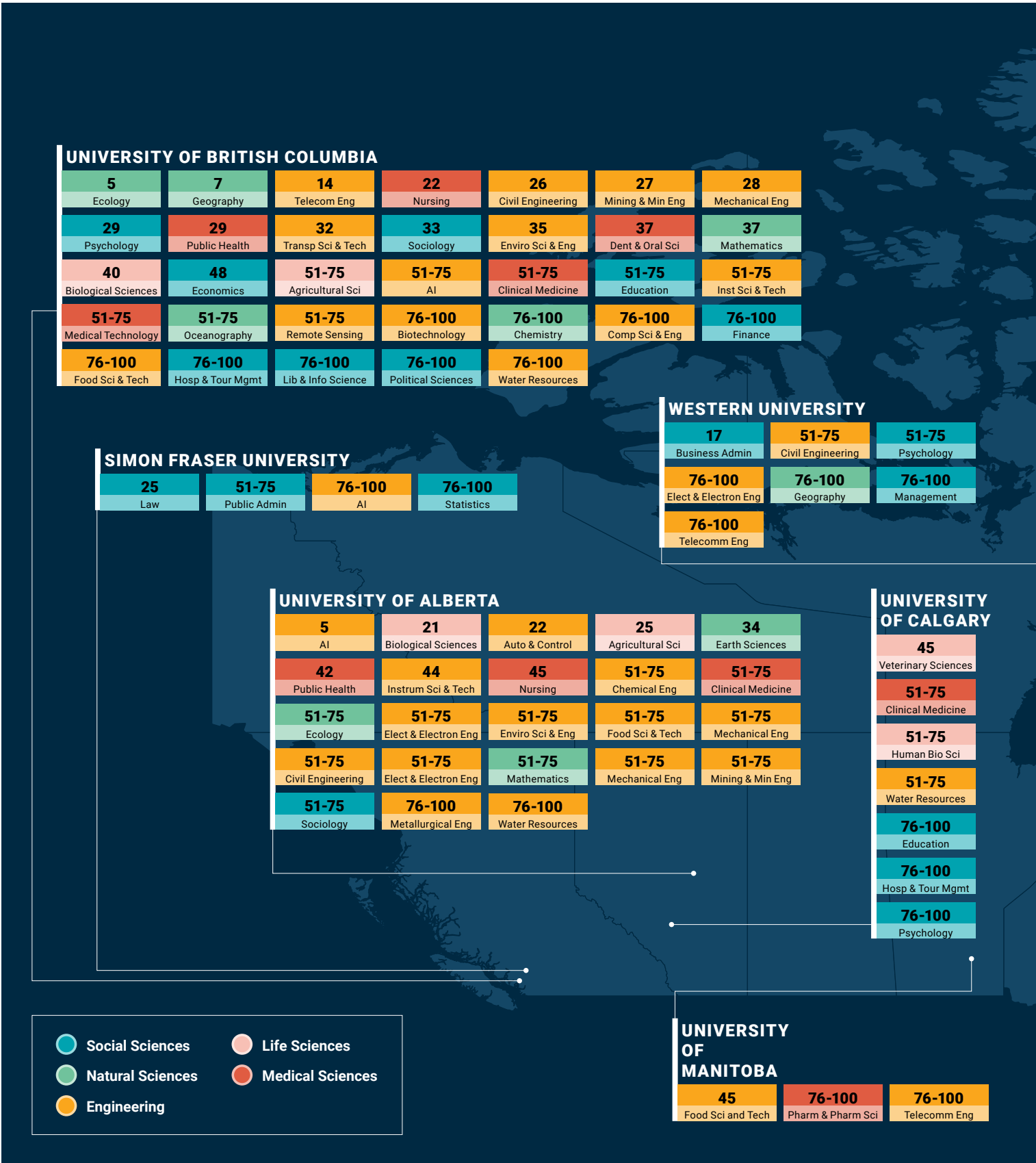
in publication patterns across different disciplines. Overall, Canadian universities do well on measures regarding quantities of scientific papers produced, in part because the major Canadian universities are somewhat larger on average than their counterparts in many other countries. The University of Toronto, for instance, ranks 7th in the world for the production of scientific papers, lagging only Harvard, and five Chinese universities (Zhejiang, Shanghai Jiao Tong, Sichuan, Central South, and Sun Yat Sen Universities)¹; however, this is at least as much a product of the University of Toronto’s own large size (over 100,000 students) and its extensive associated hospital partner network, as it is the university faculty’s innate research productivity.



Prince George Campus, University of Northern British Columbia, BC

1 Based on data from OpenAlex, an open data bibliometric engine. Using the somewhat more restricted Web of Science database, University of Toronto falls to tenth, with Peking, Tsinghua and Huazhong University of Science and Technology all moving ahead.

Figure 7.5: Distribution of Shanghai World Top 100 Ranked Subjects Across Canadian Universities, 2025



UNIVERSITY OF TORONTO

3 AI	5 Biomed Eng	6 Public Health	8 Statistics	9 Human Bio Sci	12 Finance	12 Medical Technology
13 Auto & Control	13 Psychology	14 Clinical Medicine	14 Education	14 Management	14 Political Sciences	17 Economics
17 Sociology	19 Geography	20 Biotechnology	20 Comp Sci & Eng	20 Mathematics	22 Law	23 Biological Sciences
26 Ecology	27 Physics	28 Enviro Scie & Eng	30 Nursing	31 Robotic Sci & Eng	32 Pharm & Pharm Sci	38 Dent & Oral Sci
43 Chemistry	46 Mining & Min Eng	47 Communication	51-75 Aerospace Eng	51-75 Elect & Electron Eng	51-75 Instrum Sci & Tech	51-75 Material Sci & Eng
51-75 Mechanical Eng	51-75 Telecomm Eng	76-100 Atmospheric Sci	76-100 Nanosci & Nanotec	76-100 Remote Sensing		

MCGILL UNIVERSITY

10 Lib & Info Science
25 Human Bio Sci
30 Psychology
36 Earth Sciences
46 Food Sci & Tech
47 Statistics
48 Sociology
50 Clinical Medicine
51-75 Bio Sciences
51-75 Education
51-75 Mining & Min Eng
51-75 Transp Sci & Tech
76-100 Atmospheric Sci
76-100 Dent & Oral Sci
76-100 Ecology
76-100 Enviro Scie & Eng
76-100 Mathematics
76-100 Medical Technology
76-100 Metallurgical Eng
76-100 Political Sciences

UNIVERSITY OF WATERLOO

20 Remote Sensing	21 Ener Sci & Eng
21 Telecom Eng	27 Elect & Electron Eng
30 Hosp & Tour Mgmt	34 Enviro Sci & Eng
35 Water Resources	36 Transp Sci & Tech
38 AI	38 Comp Sci & Eng
45 Physics	49 Geography
49 Materials Sci & Eng	51-75 Mathematics
51-75 Robotic Sci & Eng	76-100 Chemistry
76-100 Psychology	76-100 Public Health
76-100 Statistics	

UNIVERSITY OF GUELPH

11 Veterinary Science
18 Food Sci & Tech
43 Agri Science
51-75 Biotechnology
76-100 Hosp & Tour Mgmt

UNIVERSITY OF OTTAWA

24 Public Health
51-75 Clinical Medicine
76-100 Medical Technology
76-100 Political Sciences
76-100 Education

UNIVERSITÉ DE MONTRÉAL

9 AI
16 Lib & Info Science
42 Business Admin
45 Management
51-75 Economics
51-75 Transp Sci & Tech
51-75 Veterinary Sciences
76-100 Human Bio Sci
76-100 Public Health

MCMASTER UNIVERSITY

34 Public Health
48 Clinical Medicine
76-100 Statistics

UNIVERSITÉ LAVAL

76-100 Law
76-100 Oceanography
76-100 Water Resources

QUEEN'S UNIVERSITY

76-100 Education

DALHOUSIE UNIVERSITY

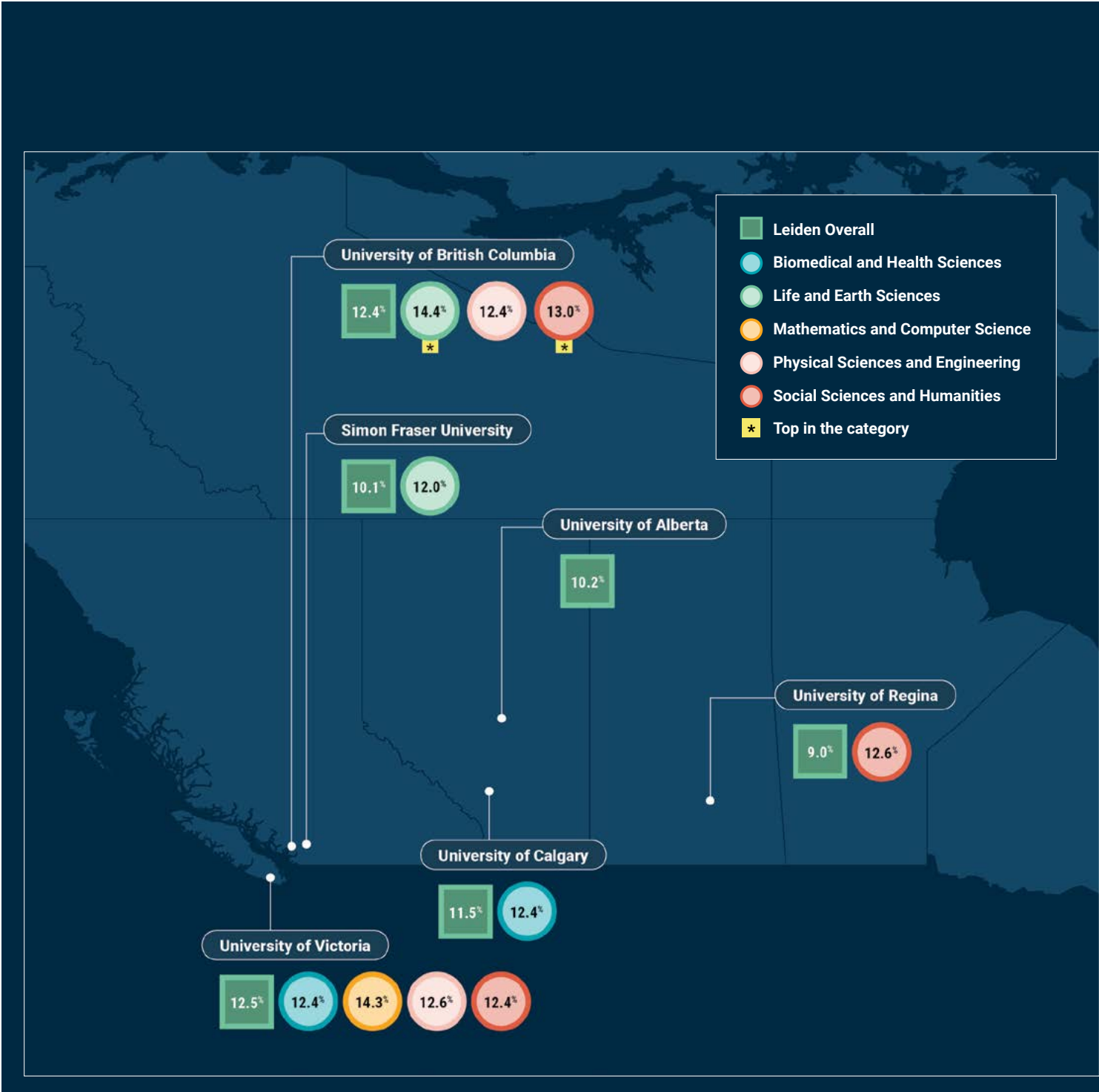
37 Oceanography

The Leiden data also permits examination of article quality in the sense of knowing whether they are highly cited relative to other papers in the same academic field. One way to measure this is to look at the percentage of papers

which are frequently cited; for instance, what percentage of papers make the top 10% of all papers in a given field in terms of citations? This can be done both at the institutional level and at the field of study level. At very top universities –

MIT and Princeton for instance – 20% of all papers written might make it into the top 10%. No Canadian institution comes close to that. In fact, only at seventeen Canadian universities do even 10% of all articles published make the top 10%

Figure 7.6: Top Canadian Universities for Proportion of Papers Attaining Top 10% Field-Adjusted Citations, by Broad Field of Study, 2020-2023

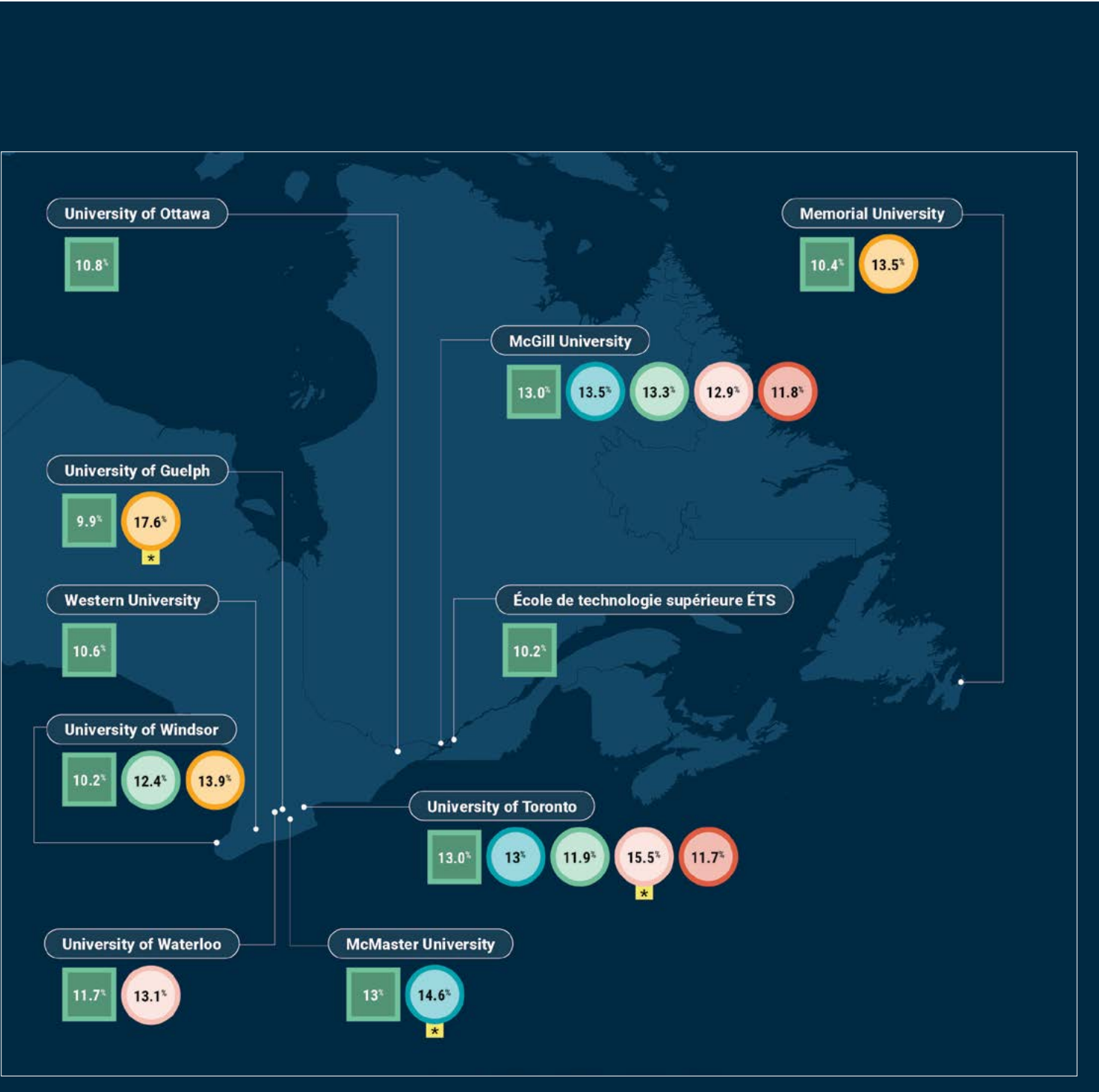


globally ; at all the rest, the proportion of papers published that is in the global top 10% are behind the global average.

The map in figure 7.6 shows both the country's top 25 institutions overall for articles in the top 10% of citations, as

well as the top five in each of five broad areas of study: Biomedical/Health Sciences, Life/Earth Sciences, Mathematics and Computer Science, Physical Sciences and Engineering, and Social Sciences and Humanities. While the top institution (Toronto) is the same as in

table 7.1, below that there is a considerable divergence. Neither Alberta nor Montreal make the top 10 institutions nationally across all fields, let alone the top 6 as they did in table 7.1; Calgary and Victoria, however, look considerably better on this measure than in rankings.

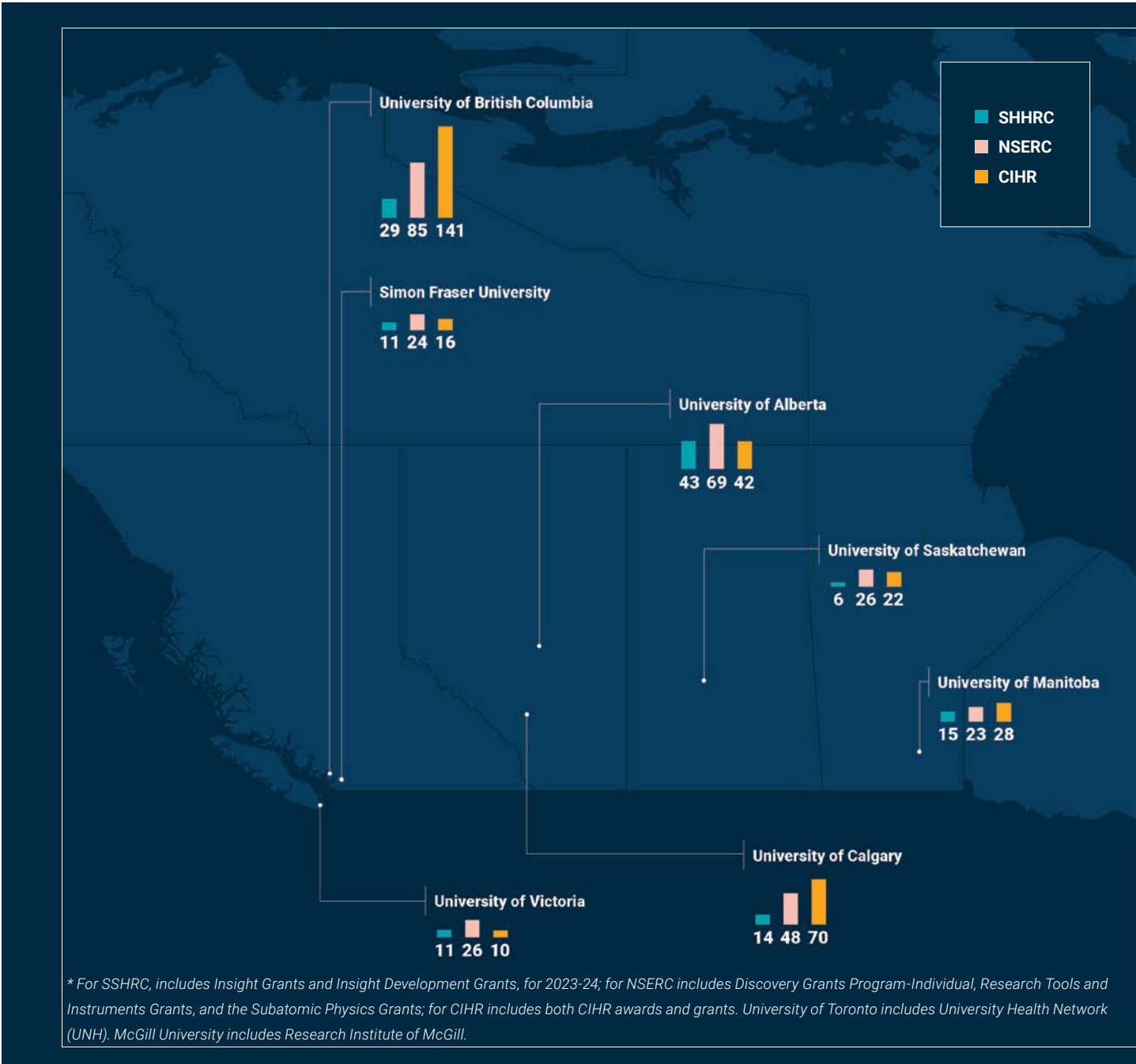


In terms of performance at the level of broad scientific fields, figure 7.6 shows that no university makes the top five in all five areas, though Toronto, McGill and (somewhat surprisingly) Victoria do so in four areas and UBC in three. This result suggests that getting to be a “top” university to some extent means having breadth of quality rather than depth in one or two areas. The list of top institu-

tions becomes anything but consistent: no other institution apart from Regina makes the top five more than once. Some care should be taken in overinterpreting these results because measures of publication-based excellence can be skewed by the output of a very small number of researchers, particularly at smaller institutions: it is notable that in the mathematics and computer science

category, the institutions with the highest average impact actually have very small outputs. The map in figure 7.7 shows how various institutions fare in terms of winning grants from each of the three traditional granting councils. A somewhat different pattern emerges here because research funding is granted on a competitive

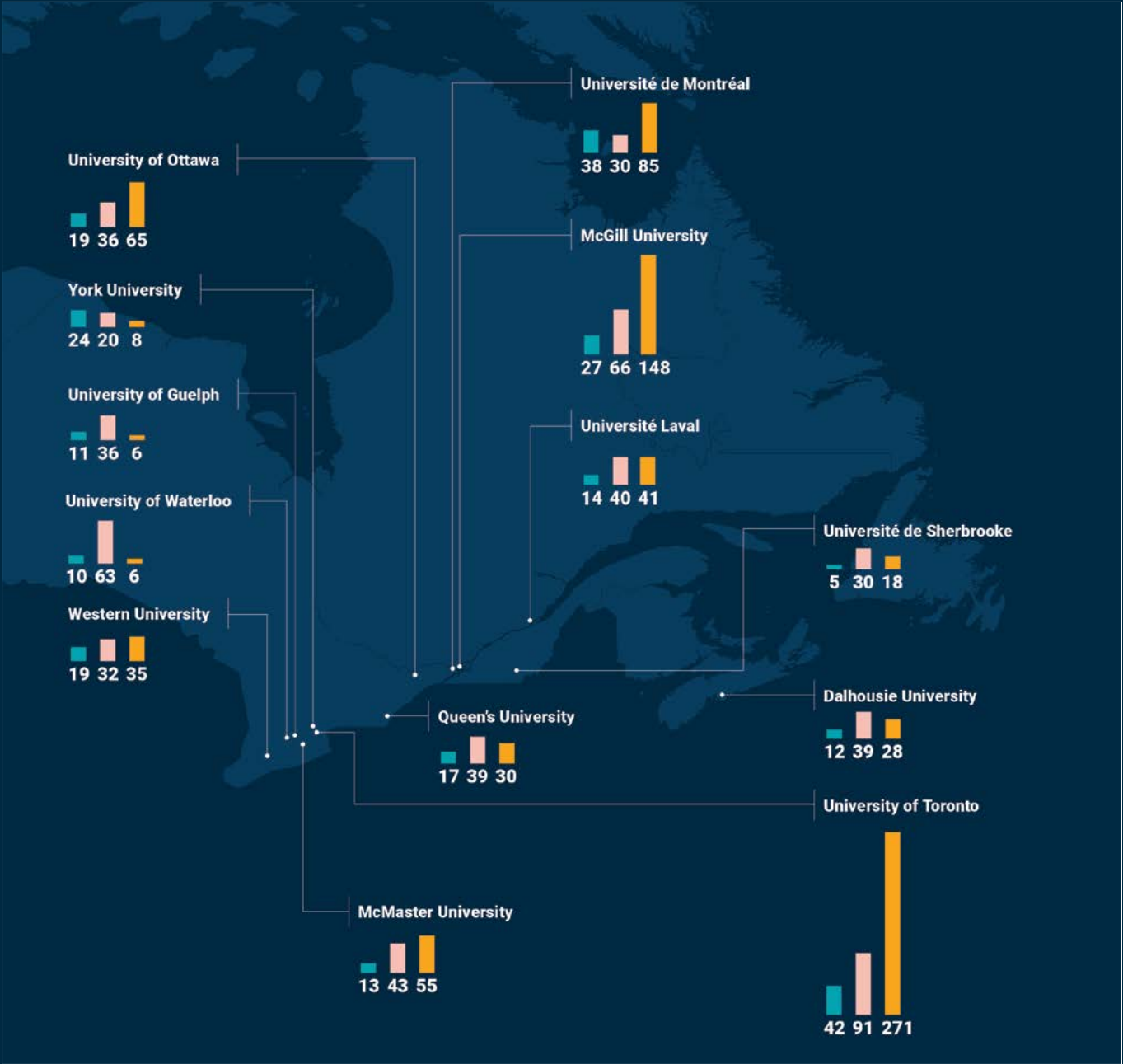
Figure 7.7: Top Institutional Recipients of Federal Research Funding, by Council, in Millions, 2024-25



basis to individuals or groups of researchers, and these researchers tend to cluster at larger and wealthier institutions; it is distributed on a more concentrated basis than operational funding. Indeed, the country's top three institutions (Toronto, UBC, and McGill) receive roughly a third of all council funding. Broadly speaking, the top institutions for council funding are the same top institutions for research that we have

seen earlier in figures 7.5 and 7.6; however, a couple of institutions stand out for bucking the trends at the level of the individual granting council, in particular Toronto Metropolitan University, which is fourth nationally for funding from the Social Sciences and Humanities Research Council despite not traditionally being thought of as a research powerhouse.

In sum, when it comes to academic research, Canada has a definite hierarchy with University of Toronto at the top followed closely by the University of British Columbia and McGill. However, beyond that, research excellence is dispersed widely, and pockets of very high-class research can be found across many different institutions, even at some that do not meet traditional definitions of being "research intensive".



7.3 COLLEGES, POLYTECHNICS AND APPLIED RESEARCH

Over the past two decades, there has been increasing attention paid to the production of “applied research” at non-university higher education institutions (HEIs). This has, in part, entailed a re-definition of what the term “applied research” implies. Prior to the early 2000s, the term was usually used as a counterpoint to “pure” or “basic” research, with the latter implying research that was largely divorced from considerations of end-use. By this definition, there were large differences between academic disciplines: medicine and engineering, by their very nature, were more use-oriented and hence more “applied” than, say, astrophysics. However, as non-university HEIs began to use the term, the meaning morphed to simply imply research conducted outside universities and in collaboration with the private sector. In some instances, the term “applied research” has come to encompass certain types of innovative training methods as well.

Many community colleges in Canada receive funding for doing various kinds of applied research. This funding tends not to come from firms themselves but from governments that wish to support them by giving them access to services available at college institutions. Much of this funding comes from the Government of Canada, although in Quebec the provincial government is also a major source of funds, providing more support than any other provincial government. Figure 7.8 shows total sponsored research funding across Canadian community colleges in constant 2024 dollars from 2012 to 2024.

Figure 7.9 shows the top 10 colleges across Canada for research funding in

Figure 7.8: Total Sponsored Research Funding, Colleges, in Millions (\$2024), Canada, 2012-2024

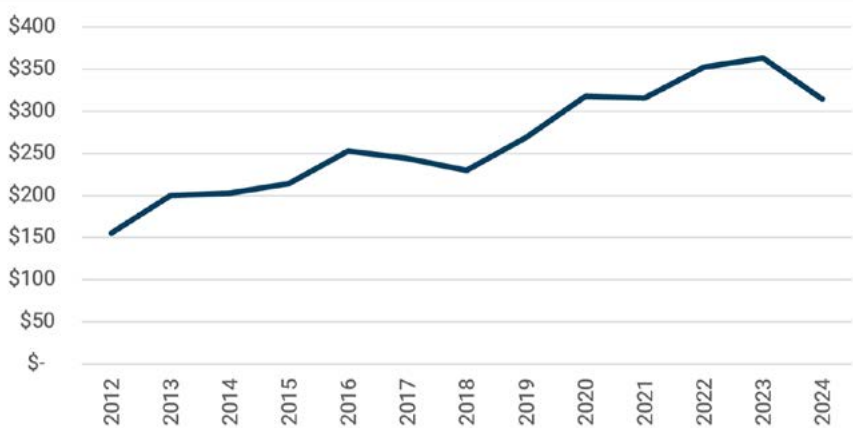
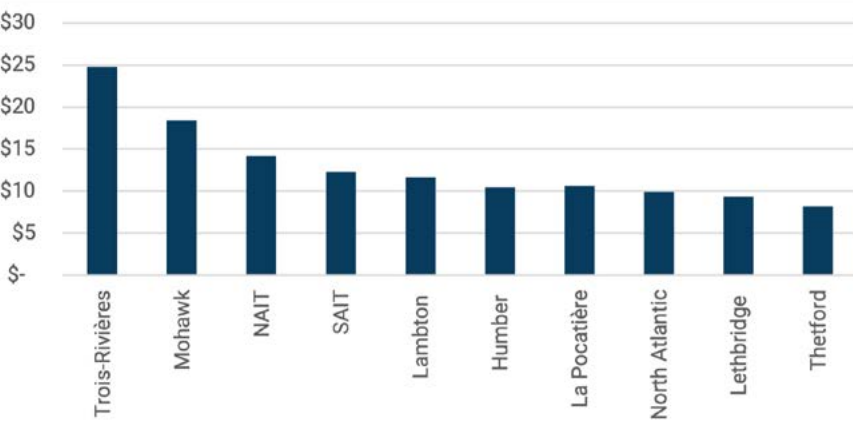


Figure 7.9: Top 10 Colleges for Sponsored Research, in Millions, Canada, 2024-25



2024-25. The sums here are significantly smaller than the figures for research at the top 10 universities: the ratio of sponsored research income between CEGEP Trois-Rivieres (the college with the highest level of sponsored income) and its university equivalent, the University of Toronto, is about 1:50. But interestingly, only three of the ten institutions with the highest levels of sponsored research income are members of Polytechnics Canada, which

identifies itself in part as a group of “research-intensive” colleges. This suggests that polytechnics’ unique value proposition may be less in the field of applied research than in developing new bachelor’s degrees for areas either not covered or covered poorly by universities. Also of note is the fact that three of the top ten are from Quebec, where the provincial government has set up its own bespoke strategy for funding this kind of research.

Appendices

Describing the Canadian Postsecondary Education System

DEFINING THE POSTSECONDARY SECTORS

Traditionally, postsecondary education has been thought of as consisting of organizations called “universities” and “community colleges,” the former offering degrees and the latter offering diplomas and certificates. However, such a definition is too simplistic. New hybrid organizations, usually referred to as polytechnics, have evolved out of the college system to become a distinct part of the institutional landscape. “Postsecondary” education also includes a system of apprenticeships which is quite unlike its European counterparts in both its structure and its target population. Additionally, a reasonably large private vocational school sector provides certifications, mostly for short training programs with a duration of less than 12 months. This appendix provides a detailed overview of the sector’s main components.

What is a University?

Most of the earliest universities in Canada were denominationally-linked, designed to provide either religious education for future clerics or religiously informed education for future primary/secondary school teachers. State funding for universities began in the nineteenth century but regular, recurring annual public expenditure did not arrive in most provinces until the Second World War. These religious origins explain why Canadian institutions tend not to act

very independently rather than as partners in “systems” of education.

Universities in Canada follow the global standard progression of bachelor’s – master’s – doctorate. The typical length of a bachelor’s degree program is four years except in Québec, where it is three. Most professional programs (medicine, dentistry, law) are technically undergraduate programs but are usually considered “second entry” bachelor’s programs, to be started only after one’s first bachelor program has finished. Québec is a partial exception in that some spots in these programs are reserved for students entering directly from CEGEP (see below, What is a College?).

There is no standard definition of what constitutes a university in Canada. Each province has legislation defining the use of the term, but these vary considerably in their stringency. Membership in Universities Canada, the country’s peak representative body for universities, is often seen as an “unofficial” form of national accreditation, though the organization itself distances itself from such claims.

Because of this definitional vagueness, it is difficult to come to a standard count of universities in Canada. Universities Canada currently has 97 members, but it excludes a number of institutions that have the right to call themselves universities, such as Tyndale University and Yorkville University in Ontario and University Canada West in British Columbia (see

below, nonstandard universities). It also excludes an increasing number of foreign universities with operations in Canada such as Northeastern University or the City University of Seattle. It does, however, include a number of bodies that are federated with other institutions and that may not themselves actually offer degrees (e.g. St. Paul’s College at the University of Manitoba, Trinity College at the University of Toronto). There is also the Université du Québec system, which consists of ten separate postsecondary institutions, as well as a number of institutions, such as the University of New Brunswick, the University of British Columbia and the University of Toronto, which have multiple campuses but are not usually described as “systems”. The most restrictive definition — provincially-funded institutions reporting to a single President and not in a federated arrangement with a larger institution — would produce a count of 64 institutions, but other definitions could produce counts of up to 120 or more.

Until the late 1980s, universities had a monopoly on the delivery of bachelor’s degrees in Canada, and they still do in Quebec, New Brunswick, Prince Edward Island and Newfoundland and Labrador. However, over the past 30 years, the governments of British Columbia, Alberta, Saskatchewan, Manitoba, Ontario, and Nova Scotia have begun to allow some colleges to deliver degrees as well, sometimes to widen access to the four-year degree, and sometimes simply to promote more competition in the

postsecondary sector. Some of the colleges given degree-granting power eventually became universities in their own right (e.g. Vancouver Island University, Mount Royal University) while many of the remainder have begun to style themselves as “polytechnics” (see below). Universities do, however, maintain control over graduate education and basic research, though many colleges and polytechnics have over the past two decades carved out their own niches in applied research and the province of Ontario has recently opened the door to colleges offering Master’s Degrees as well.

Canada has no official university typology. However, while Canadian universities come in a variety of shapes and sizes, they do tend to converge on a number of “types”. Firstly, there are the large research universities with medical schools. There are fourteen of these, and they make up nearly all of what is known as the “U15” group of universities (the fifteenth member, Waterloo, has neither a business school nor a medical school, but is included in the group because of its excellence in specific areas of technology). There are also a large number of small, non-research-intensive institutions, including a number of denominational universities (e.g. Redeemer), art schools (e.g. Nova Scotia College of Art and Design), the “Maple League” of Liberal Arts Colleges (Bishop’s, Mount Allison, St. Francis Xavier and Acadia), or institutions that serve small cities and

associated rural areas (e.g. University of Northern British Columbia, University of Prince Edward Island, Brandon University). In between, there are many institutions ranging in enrolment from about 5,000 to 50,000, which are usually given the unofficial label of “comprehensive” universities. The smaller ones (e.g., the University of Windsor) are mostly focussed on undergraduate instruction while the larger ones (e.g., Guelph, Simon Fraser) are, by some measures, more research-intensive than some members of the U-15.

By international standards, Canadian universities are relatively autonomous from governments. Though some of the country’s older institutions, such as McGill and Queen’s have governing boards that are entirely independent of provincial governments, most Canadian universities do have some government appointees on their boards, though they do not always constitute a majority. As a general rule, governors tend not to “take direction” from government, and it is rare that a government attempts to direct its appointees to follow a particular line on a specific issue. For a variety of historical reasons, governments’ inclination to try to control institutional actions through Board selection tends to grow as one goes further west across the country. Generally, provincial governments are typically more inclined to steer institutions through the power of the purse than by controlling actions directly through

Board votes. At the same time however, over the past couple of decades, governments have increasingly tried to alter institutional policy through direct confrontation.

Boards are mainly responsible for universities’ financial affairs, as well as selecting Presidents and monitoring and evaluating their performance. Laval and Sherbrooke are the main exceptions in that their Presidents are selected by an electoral college made up of various internal stakeholder groups rather than selected by a Board of Governors. In academic matters, universities are governed by bodies that are usually known as Senates (though sometimes by other names, such as Faculty Councils). Elected academics usually make up a majority on these bodies, though elected students and various administrators sitting ex-officio can take up a large proportion of seats. A very few universities have a “tricameral” system that also includes a third body made up of elected alumni (e.g. Saskatchewan, Queen’s) or a de facto second academic chamber (Université de Montréal); the University of Toronto is unique in having a unicameral system consisting of a singular Governing Council that acts as both Board and Senate, though in practice its committee system largely separates the academic and business functions in a way not dissimilar to bicameral institutions.



Non-Standard Universities

When the term “university” is used in Canada, it generally refers to stand-alone public institutions. But many institutions in Canada do not fit that definition and yet either use the term “university” themselves or are classified as such by others. Broadly, these exceptions fit into one of five categories:

Affiliated Colleges:

There are a large number of small, usually denominational, colleges that have federation agreements with larger, public institutions. The majority of these are in Ontario; in many cases, the colleges are older than the public institution with which they are affiliated. When Ontario finally agreed to publicly finance higher education on a large scale in the 1950s, it did so on the understanding it would not finance religious institutions, which at the time far outnumbered the non-denominational schools. For example, Laurentian University until very recently had federation agreements with Thornloe (Anglican), Huntingdon (United) and Sudbury (Catholic) Universities, and Assumption University is a federated body of the University of Windsor. Outside Ontario, we see similar arrangements at places like the University of Manitoba, which has St. Paul’s (Catholic) and St. John’s (Anglican) Colleges, and the University of Regina, which has two religious federated colleges (Campion and Luther) as well as an affiliation with the First Nations University of Canada. Occasionally, universities have minority-language associated colleges, such as Glendon College at York University or Campus St. Jean at the University of Alberta, though these tend to have less autonomy than other affiliated colleges.

Stand-alone religious institutions:

While many religious institutions sought arrangements with public universities, others did not. Some of these have membership in Universities Canada, such as Trinity Western University in British Columbia, King’s University in Alberta, and Canadian Mennonite University in Winnipeg. A few have degree-granting

powers but stay outside Universities Canada, such as the St. Stephen’s University in New Brunswick, Tyndale University in Toronto and Burman University in Alberta.

Private non-denominational universities:

There are very few of these, though their number is growing. At the moment, this group also includes the business-orientated University Canada West in Vancouver, the International Business University in Toronto, Yorkville University and the University of Niagara Falls Canada.

Indigenous institutions:

Across Canada there are approximately 50 institutions, mostly in Western Canada, that provide postsecondary education specifically for Indigenous peoples. The funding arrangements for these institutions vary by province. With only one or two exceptions, they are not degree-granting institutions, and, to a considerable extent, they serve as delivery platforms for programs established by mainstream institutions rather than providing programs of their own design. They also tend to offer programming at both the college and university levels simultaneously.

Offshore institutions:

Canada has had a few foreign universities establish a presence in Canada, but they often do not last very long. Charles Sturt University of Australia, for instance, offered teacher education programs at a campus in Brampton for about a decade before closing in 2016. Currently, the New York Institute of Technology and Fairleigh Dickinson University, and City University of Seattle have campuses in Vancouver, while Northeastern University recently opened a campus in Toronto. City University of Seattle also has a campus in Edmonton. University Canada West and the new University of Niagara Falls are both owned by a privately held British for-profit company called Global University Systems.



Parrott Centre Library, Loyalist College, ON

What is a College?

Vocational education in Canada has a long history, but most publicly funded post-secondary vocational education dates from the 1960s. Colleges are the most heterogeneous part of the Canadian educational system: The institutions that go by this name vary significantly in nature from one end of the country to the other.

The “classic” form of community college delivers mostly vocational/trades programs to primarily mature (i.e. not direct-from high school) students in 2-year programs. At one point, this was the dominant form of community college in Saskatchewan, Manitoba, Ontario, and the four Atlantic provinces. Over time, as the economy has become more service-driven, the offerings of colleges have become white-collar oriented. They remain focused on professional education leading directly to careers, but increasingly, these careers are in health care, technology, and business. With a more professional orientation has come an increase in program length (Ontario college programs are now mostly three years) and, outside the Atlantic provinces, an increase in the provision of actual degrees as well. Over time, Ontario has drifted the furthest from the “classic” model of colleges, and the Atlantic colleges the least.

Alberta and British Columbia always had a slightly different model for community colleges, one much closer to the American model of “junior colleges”. In these two provinces, community colleges were professionally oriented like those in the other seven majority-anglophone provinces. However, in addition, they also had a university-transfer function. Both provinces initially were very cautious about expanding universities and so until the 1990s mostly kept them concentrated to the major urban areas with students from outside the urban centres doing the first two years at regional colleges before transferring to the universities. Since the turn of the century, both provinces have been expanding their university systems by transforming colleges into universities, and as a result the university-transfer aspect of colleges has eroded somewhat. Yet, because of the transfer mission, both Alberta and British Columbia have extensive inter-institutional credit-transfer arrangements not replicated elsewhere in the country.

Quebec’s college system is quite different from those in the rest of the country. Quebec has only five years of secondary school compared to six in the rest of the country (with the result that the normal leaving age is 16 or 17 rather than 17 or 18). Students may then attend

a College d’enseignement général et professionnel (CEGEP) for two years. As in Alberta and British Columbia, there are two streams — a vocational/professional one that leads to the labour market, and a general one that ends with the awarding of a *diplôme d’études collégiales* (DEC), which is a necessary prerequisite to attend university. All Quebec students bound for university must therefore attend college. This model made a great deal of sense 60 years ago when the province’s small postsecondary system was mostly composed of Catholic “*collèges classiques*” offering education that was more rigorous than secondary education but less so than a full degree. During Quebec’s Quiet Revolution of the 1960s, these religious colleges either became CEGEPs or in a few cases became the nuclei for campuses of the emerging Université du Québec system. The exception was Bishop’s, which converted to university status. It is unlikely that anyone would adopt such a model today, because it is no longer clear that there is any demand for an intermediate non-vocational credential between secondary school and university. Nevertheless, Quebec’s current system is so entrenched that it will almost certainly survive through inertia alone.

Who Controls Degree-Granting Authority?

Universities, by definition, have authority to grant degrees. But in many parts of the country, so too do other organizations, including private institutions and community colleges. How did these bodies become degree-granting?

The power to authorize the granting of degrees rests with the various provincial ministers of advanced education. In nearly all provinces, there is enshrined in legislation a process by which institutions — be they community colleges or private institutions — can apply to offer degrees. Interested institutions must apply separately for each degree they wish to offer. Different processes exist for dedicated arms-length organizations to evaluate whether the institution has the financial and human resources to offer the degree. If this an institution is making a program request for the first time, there is

usually a separate inquiry made into the suitability of the institution itself and its promoters, known as an “institutional review”. Review is usually carried out by a body which is at least marginally arms-length from government. Ontario, British Columbia and Alberta have the Postsecondary Education Quality Assessment Board, Degree Quality Assessment Board and Campus Alberta, respectively, while the Maritime provinces jointly employ the services of the Maritime Provinces Higher Education Council for the same purpose.

While these dedicated organizations evaluate proposals, their role is only advisory: provincial Ministers of Advanced Education retain the final power to decide the merits of any given proposal. In practice, the recommendations of the arms-length organizations are accepted in the majority of cases.

All told, there are over 200 public colleges across Canada. Colleges tend to be open-access, and they are more likely to be located in rural and remote parts of the country than are universities. Indigenous students are more likely to be found at colleges than at universities. Colleges also tend to be smaller than universities; there are only a dozen or so community colleges with more than 10,000 students.

From a governance perspective, colleges are under tighter government control than universities; in some provinces, colleges existed as departments within their provincial government until the early 1990s. Their Boards tend to contain more members directly appointed from government and they tend to have less freedom to independently innovate in their programming. In three provinces

— Newfoundland and Labrador, Nova Scotia, and Saskatchewan— there are single institutions with multiple sites province wide. New Brunswick has one multi-site English-language college and one multi-site French-language college: Prince Edward Island has single-site English and French institutions. On the labour side, college employees tend to be unionized at the provincial rather than the institutional level, meaning there is sector-wide bargaining in colleges, unlike in universities where bargaining occurs exclusively at the institutional level.

What is a polytechnic?

The term “polytechnic” has a number of uses around the world. In France, it refers to one specific elite Engineering school. In the United Kingdom (up until 1992), it

referred to a kind of junior college, offering university-style programming, but not permitted to issue degrees. It meant something similar in New Zealand for a long time, though recently those polytechnics have come to have much more professional and technical foci as well. In Finland, polytechnics (technically “ammattikorkeakoulu”) are also known as “Universities of Applied Sciences”, and while they focus on practical and professionally oriented education, they also engage in applied research and issue both bachelor’s and master’s degrees.

Except in Alberta, the term “polytechnic” does not have a specific legal meaning in Canada. Rather, as some Canadian community colleges — mainly the large ones from Ontario and the four western provinces — became more professionally-oriented and technologically sophisti-

cated, increased their involvement in applied research and started offering degrees at the Bachelor's level, a group of these institutions chose to collectively rebrand themselves with the term "polytechnic" and band together to lobby at the federal level under the banner "Polytechnics Canada". However, most Polytechnics Canada members also remain members of Colleges and Institutes Canada, the peak representative body for community colleges.

Prior to the widespread adoption of the term "Polytechnic" in the mid-00s, the last major institution to carry this label was Ryerson Polytechnic, which transformed into a university (Ryerson University, now Toronto Metropolitan University) in the early 1990s. For this reason, the move by some institutions to adopt the "polytechnics" moniker is sometimes seen as evidence that such institutions are simply colleges that want to become universities. In one or two cases that is clearly true: Sheridan College, a Toronto-area member of Polytechnics Canada, was quite open in seeking university status in the early 2010s and Kwantlen Polytechnic University has already achieved it. Others however (e.g. the British Columbia Institute of Technology) have turned down university status when it was offered to them and most seem focused on forging an independent identity as Polytechnics in the liminal space between colleges and university.

Apprenticeships

Apprenticeships in Canada are a form of postsecondary education where learners combine periods in the workforce under the supervision of experienced tradespeople with periods of in-class study that occurs mainly, but not exclusively, in community colleges.

Technically, apprentices are not "students" and do not show up as such in college enrolment statistics. Rather, they are employees who have signed specific

apprenticeship contracts with employers and who periodically attend technical classes held at colleges, or less often private vocational colleges or union training facilities. Apprenticeships are organized by trade, and most trades are of the traditional vocational variety, particularly those related to housing, construction, automobile, and food industries. In the last decade, there have been various attempts to bring apprenticeships to other, more service-oriented occupations (mainly: aestheticians, early childhood educators and IT service professionals), with mixed results. Though efforts have been made to increase apprenticeship options in secondary schools, apprentices in Canada tend to be in their mid-20s to mid-30s and already have significant job experience when they begin their term.

Apprentices pass through various "levels" before achieving certification as journeypersons. The number of levels, as well as the number of work hours and weeks of in-class training, may vary by level, trade, and province. Broadly speaking, most of the major trades have four levels that require one year each to complete. Within each level, apprentices are normally spending approximately 80% of their time in a workplace under the auspices of an experienced journey-person and 20% in some kind of formal instructional space. Community colleges are the usual spot for such instruction, though increasingly unions are creating their own training spaces and being awarded and compensated for training spaces by governments keen to curry favour with organized labour. Finishing the final level and passing the relevant exams entitles the individual to a provincial trades certificate; to work outside the province, individuals must complete a second set of tests known as "Red Seal Exams".

The Canadian apprenticeship system is an international outlier for a variety of reasons. The first is that it is considered part of the postsecondary system rather than the secondary one: hence, the

relatively advanced age of its apprentices compared to those in other countries. The second is the length of the programs, which are typically four years compared to two in most of Europe. The third is the release system for theoretical in-class training. Most national apprenticeship systems employ a day-release system that sees apprentices spend 3-4 days a week at work and 1-2 in class. This is not unknown in Canada, but more common is the "block release" system that sees apprentices work for 35-40 weeks at a time and then go to class for blocks of 8-12 weeks. The final difference is the relatively limited number of occupations for which apprenticeships are available: Canadian apprenticeships are mostly for blue-collar occupations and have seen relatively little expansion into areas such as banking, IT and office-work as has been the case in Europe and, increasingly, the United States as well.

Private Vocational Colleges

The final element of Canada's postsecondary education system is that comprised of private, mainly for-profit, vocational colleges. These resemble the private for-profit sector in the United States except that they focus mainly on programs of one year or less rather than degree-level programming. They are quite common in certain fields that are not covered at community colleges, such as music production, aesthetician training, and dental assisting, but they also offer some relatively advanced IT training as well. Language schools are another large sector, though they mainly focus on students from outside Canada. Because they operate without subsidy, their programs tend to be significantly more expensive than those of community colleges; on the other hand, because they operate on a continuous-intake basis, they offer students more convenience than institutions whose only intakes are in September and January. There are several hundred of these institutions registered across Canada.

Most are small, independent businesses, but a substantial portion of students are enrolled at large, multi-campus institutions such as triOS College or CDI College, which tend to have a focus on business or IT.

In recent years, particularly in Ontario, the line between public and private colleges has been blurred substantially through the use of so-called Public-Private Partnership arrangements. These began in the 2010s when a few public colleges outside of the Greater Toronto Area signed deals with private colleges under which the former recruited international students, collected their tuition and then paid a low amount to a private provider to teach them in accordance with the public institutions' curriculum. This is the arrangement that super-charged the recruitment of international students to Ontario colleges: suddenly an option existed in which colleges, regardless of geography, could gain from the desire of students, particularly from India, to get on a path to permanent residency while working and living in the GTA. These PPP arrangements were briefly banned by the Wynne government but were brought back and greatly encouraged by the Ford government to the point where virtually all the non-Toronto-area colleges had these kinds of PPP arrangements. In January 2024, the Government of Canada, in a bid to reduce the number of non-permanent residents, made policy changes that effectively made it impossible for students attending PPP colleges to gain a pathway to permanent residency. This made these kinds of arrangements much less appealing, and most PPP arrangements were terminated by early 2025.

Federalism and Postsecondary Education: Who Funds What?

A basic tension in the Canadian Confederation debates of the 1860s was how to create a system of representation by population that also guaranteed Catholic, francophone Quebec the ability to maintain control over cultural institutions, in particular schools. The eventual solution was a federal system with a national government elected through a rough representation by population, but with responsibility for education (among other things) vested firmly at the provincial level. This compromise is enshrined very specifically in s. 93 of the Canadian Constitution, which allocates responsibility for postsecondary institutions and their funding to the provinces. This is why Canada effectively has ten provincial systems of postsecondary education rather than a single national one.

Though operating funds, which include both provincial government funding and tuition fees, are in effect exclusively the responsibility of provincial governments, the federal government contributes to the higher education sector in three ways: through transfer payments to provinces, support for scientific research, and various forms of student assistance.

The federal government transfers funds to provincial governments through equalization payments designed to allow poorer provinces to provide services at levels similar to richer ones and through per-capita payments via the Canada Health Transfer and the Canada Social Transfer. These transfer programs originated in the 1940s, when the federal government "borrowed" tax room from provinces to pay for the war effort, and they continued in the 1950s/60s when the government began to use these tax revenues to pay provinces for the development of what we now know as our social safety net. Approximately 30% of the Canada Social Transfer is theoretically allocated to postsecondary education; however, since there is no

way to track federal funds once they are in provincial coffers, this allocation is purely notional. In total the \$5 billion or so from this source would account for only about 7% of total institutional revenue in Canadian PSE. Further details about these arrangements may be found in Chapter 4.

Funding for scientific research at universities began during World War I, but it only became a major source of institutional funding during the 1970s. For many years, this funding was directed not to institutions, but to individual researchers (or groups thereof) through the granting councils. From the early 1990s onwards, however, there has been a gradual move towards funding research at an institutional level, first through the Network Centres of Excellence, then through the Canada Foundation for Innovation (which funds research infrastructure) and most recently through the Canada First Research Excellence Fund. Some provinces, most notably Québec, also fund research separately but the main sources of funding lie in Ottawa. More details on the system of research may be found in Chapter 7.

Student assistance in Canada takes various forms, but both provinces and the federal government contribute to students' education through loans, grants, and tax credits. In addition, the federal government spends over \$1 billion per year in educational savings incentives. More detail on this may be found in Chapter 5.

On top of all of the above, there is also funding for capital, which tends to be erratic and comes in bursts, often in the form of "stimulus" programs in times of economic downturn. Increasingly, outside Québec at least, provincial governments are relying on occasional federal government spending sprees (for example, the British Columbia Institute of Technology) to take care of capital funding, though institutional fund-raising is also rising in importance as a source of capital funds.

Note on Sources

Most of the data used in this report is drawn from various Statistics Canada surveys, though some are developed from the authors' calculations using figures from the databases noted below. In many cases, descriptions of how the data was acquired and calculated is provided in the chapter text.

CHAPTER 1

Student numbers up to 2023-24 are drawn from Statistics Canada's Postsecondary Student Information System (PSIS). Supplemental data is drawn from sources such as Colleges Ontario, Polytechnics Canada, and other organizations, as noted in the text. For universities, enrolment data has been supplemented for the 2024-25 years with data provided by institutions themselves, either on their own websites, or the websites of regional agencies (such as the Atlantic Association of Universities) or provincial governments, or through the annual Universities Canada survey of enrolment. Where multiple sources of data exist, the preference is institutional data > regional data > data from Universities Canada. To avoid large swings in data, the final year is calculated using the reported percentage change in institutional enrolments, applied to the institution's 2023-24 Statistics Canada base. Enrolment data for colleges beyond 2023-24 are projections based on provincial-level data available from Quebec, Ontario, Alberta, and British Columbia, along with institutional data from the New Brunswick Community

College and the College Communautaire de Nouveau-Brunswick, which together cover over 90% of national college enrolments. Other sources of student data include the Canadian Undergraduate Survey Consortium (CUSC)'s 2025 Survey of First-Year Students and the 2021 census. Data on Canadian apprentices are from Statistics Canada's Registered Apprentice Information System; comparative data for German apprentices is from Statistische Bundesamt. Data from other OECD countries are from the OECD's online *Data Explorer*. Data on student visas come from Immigration, Refugees and Citizenship Canada Open Data and the Auditor General's 2026 report on the International Student Program Reforms.

CHAPTER 2

Data on academic staff is mostly drawn from the University and College Academic Staff System (UCASS) survey for universities or from the Labour Force Survey. Data on total staff numbers are from Statistics Canada's Survey of Employment, Payroll and Hours (SEPH).

Data on the composition of staff numbers in Ontario are from Colleges Ontario's annual Environmental Scan; our thanks to this organization for providing an advance look at the data for this year.

CHAPTER 3

Data on postsecondary finances are drawn mainly from Statistics Canada's Financial Information of Universities Survey (FINUNI, sometimes called FIUC) survey and the Financial Information of Colleges (FINCOL) survey. Data is currently available up to 2024-25 for FIUC and 2023-24 for FINCOL. College income data for 2023-24 is obtained by examining institutional-level financial statements and applying the difference between these years to the 2023-24 data. International comparative data is from the OECD's *Data Explorer*.

CHAPTER 4

Data in Chapter 4 comes from the most recent editions of FINUNI and FINCOL, with per-student data calculated by

using the sources listed for Chapter 1. The exception is the data on budgeted provincial funding as a percentage of total provincial spending: these are drawn from a HESA database using annual provincial budget statements since 2006.

CHAPTER 5

Data on fees comes from Statistics Canada's Tuition and Living Accommodation Cost (TLAC) Survey. Data on loans and grants comes from a series of surveys and data requests conducted by Higher Education Strategy Associates and its predecessor organization Educational Policy Institute (Canada), as well as freedom of information requests conducted annually by HESA since 2018. Data on federal student assistance comes from the annual statistical report of the Canada Student Financial Assistance Program. Data on federal tax expenditures comes from the annual federal review of tax expenditures. Provincial data is based mainly on a series of estimates using provincial tax rates and Canada Revenue Agency data on tax filers and their use of credits. Data on the Canada Education Savings Grant (CESG) is from the CESG's Annual Report. Data on institutional scholarship expenditures are drawn from FINUNI/FIUC and FINCOL. Data on student loan debt is taken either from Statistics Canada's National Graduate Survey or from CUSC's triennial survey of graduating students (the latest being 2024).

CHAPTER 6

Data on completion rates comes from Statistics Canada's Postsecondary Student Information System (PSIS). Data on educational attainment over time and across provinces comes from Statistics Canada's Labour Force Survey. National data on graduate employment rates and

graduate income for Canada comes from various iterations of Statistics Canada's National Graduate Survey, the most recent being for the class of 2020. Data from Ontario comes from the Ontario University Graduate Survey and specifically from the annual publication produced by the Council on Ontario Universities. International comparative data is from the OECD's *Data Explorer*.

CHAPTER 7

Data on national performance in expenditures on research and development expenditures is from the OECD's Main Science and Technology Indicators database and, in most cases, are up to date as of 2023. Data on institutional and program rankings are drawn directly from rankings' agencies websites. National-level data on scientific publications is from the US National Science Foundation's *Science and Engineering Indicators*. Data on institutional performance with respect to publications comes from the Centre for Science and Technology Studies at Leiden University. Data on institutional performance on international rankings is drawn directly from the main ranking agencies websites. Information on granting council funding is drawn from FINUNI/FIUC. Data on applied research at Canadian colleges comes from Research InfoSource's 2024 edition of "Top 50 research colleges".

PROVINCIAL PROFILES

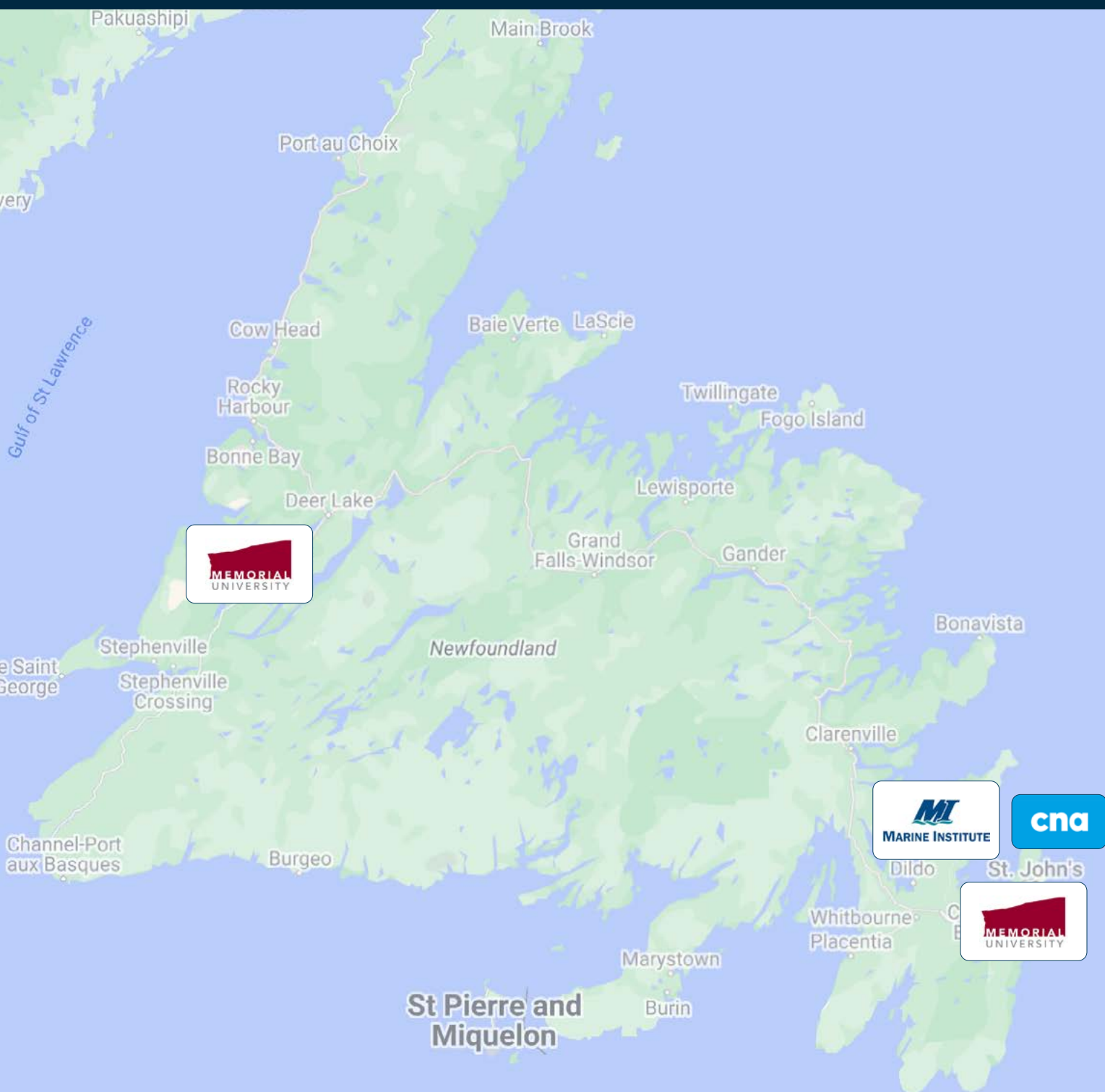
These have the same sources as in the rest of the document. With respect to students, institutional finances, and tuition fees, the data is from Statistics Canada; with respect to student financial aid data, it comes from annual surveys of provincial student aid offices conducted by HESA.

Provincial Profiles

- ▶ NEWFOUNDLAND & LABRADOR
- ▶ PRINCE EDWARD ISLAND
- ▶ NOVA SCOTIA
- ▶ NEW BRUNSWICK
- ▶ QUÉBEC
- ▶ ONTARIO
- ▶ MANITOBA
- ▶ SASKATCHEWAN
- ▶ ALBERTA
- ▶ BRITISH COLUMBIA

PROVINCIAL PROFILE

Newfoundland & Labrador



STUDENTS

Enrolments in Newfoundland and Labrador have lagged those in the rest of the country for many years, which is mainly due to the province's adverse demographic situation. Enrolments

have fallen in absolute terms in the college sector. International students form a significant part of total enrollments in the university sector but not the college sector.

Figure NL1: Total Postsecondary Enrolments by Sector, Newfoundland and Labrador, 2000-01 to 2024-25

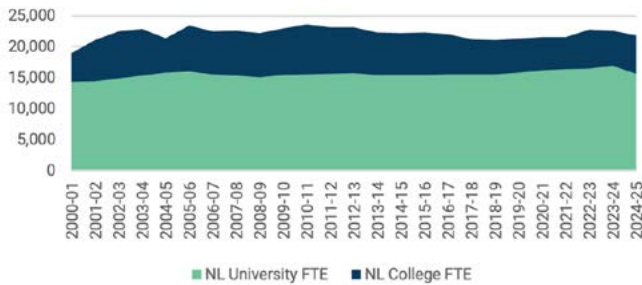


Figure NL2: Total Postsecondary Enrolments by Sector, Canada, 2000-01 to 2024-25

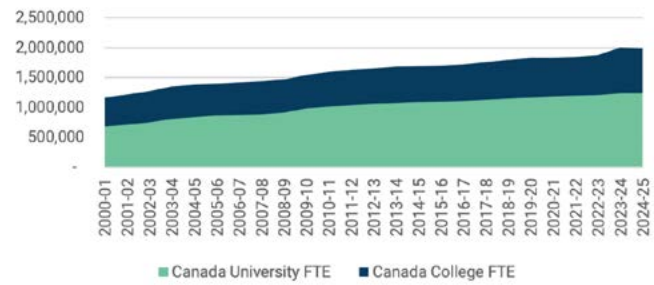


Figure NL3: International Students as a Percentage of Total College Enrolments, Canada vs. Newfoundland and Labrador, 2000-01 to 2023-24

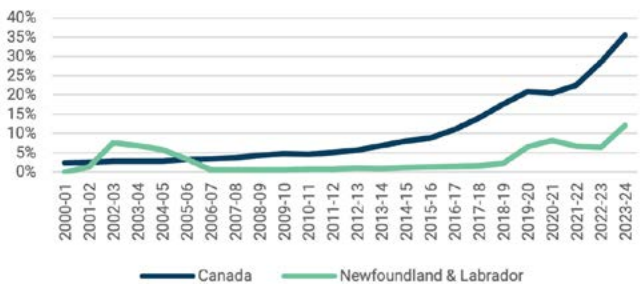
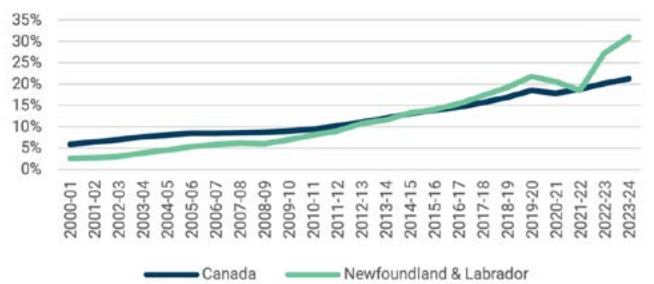


Figure NL4: International Students as a Percentage of Total University Enrolments, Canada vs. Newfoundland and Labrador, 2000-01 to 2023-24



INSTITUTIONAL INCOME

Powered by quickly rising oil revenues, government expenditure on postsecondary education more than doubled in real terms between 2001 and 2011. This permitted the province to

freeze tuition fees and significantly increase total resources available to institutions. Since then a long slow period of decline set in.

Figure NL5: Total University and College Income by Source, Newfoundland and Labrador, 2001-02 to 2024-25, in \$2024

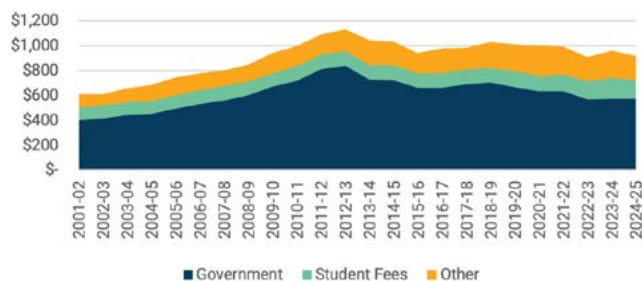
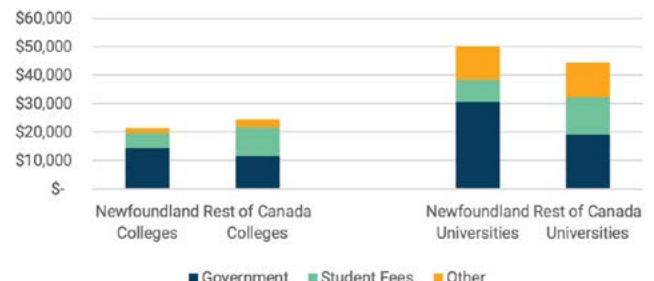


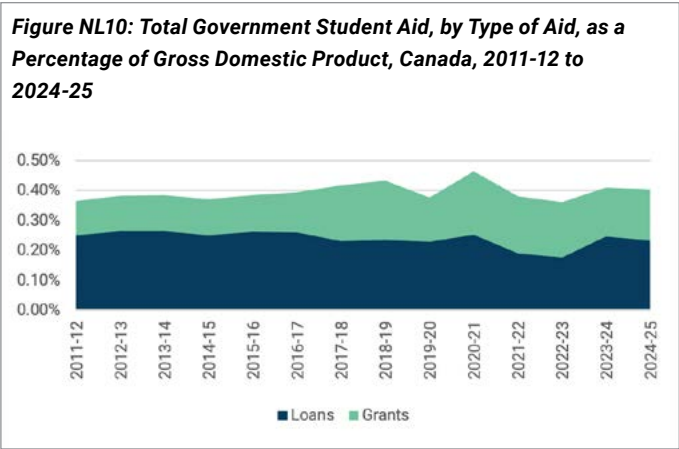
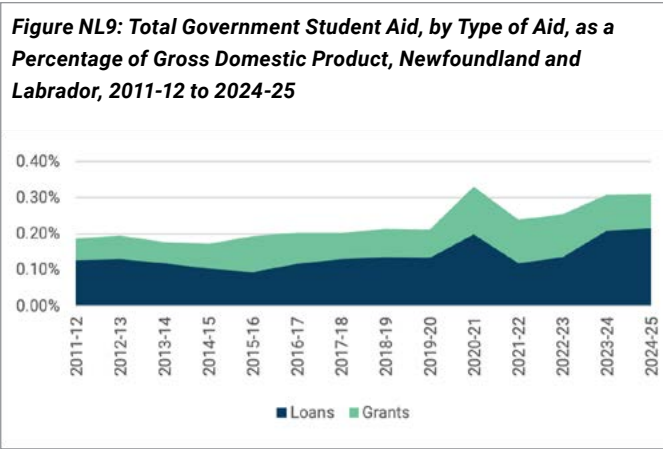
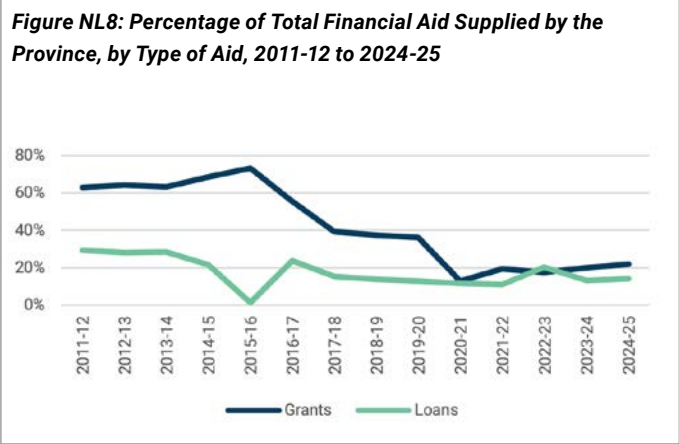
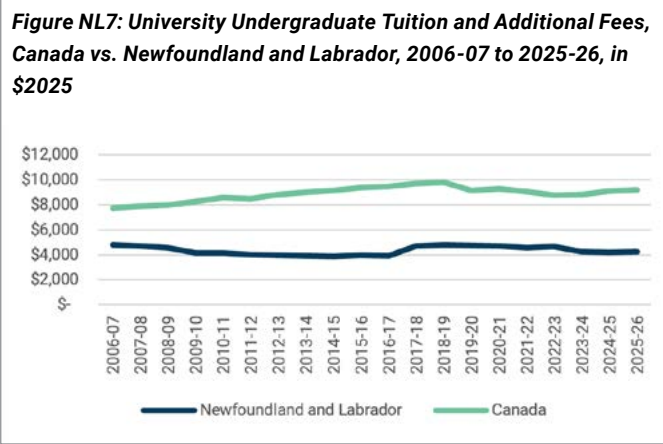
Figure NL6: Total Income Per Student, by Source and Type of Institution, Canada vs. Newfoundland and Labrador, 2024-25



TUITION AND STUDENT AID

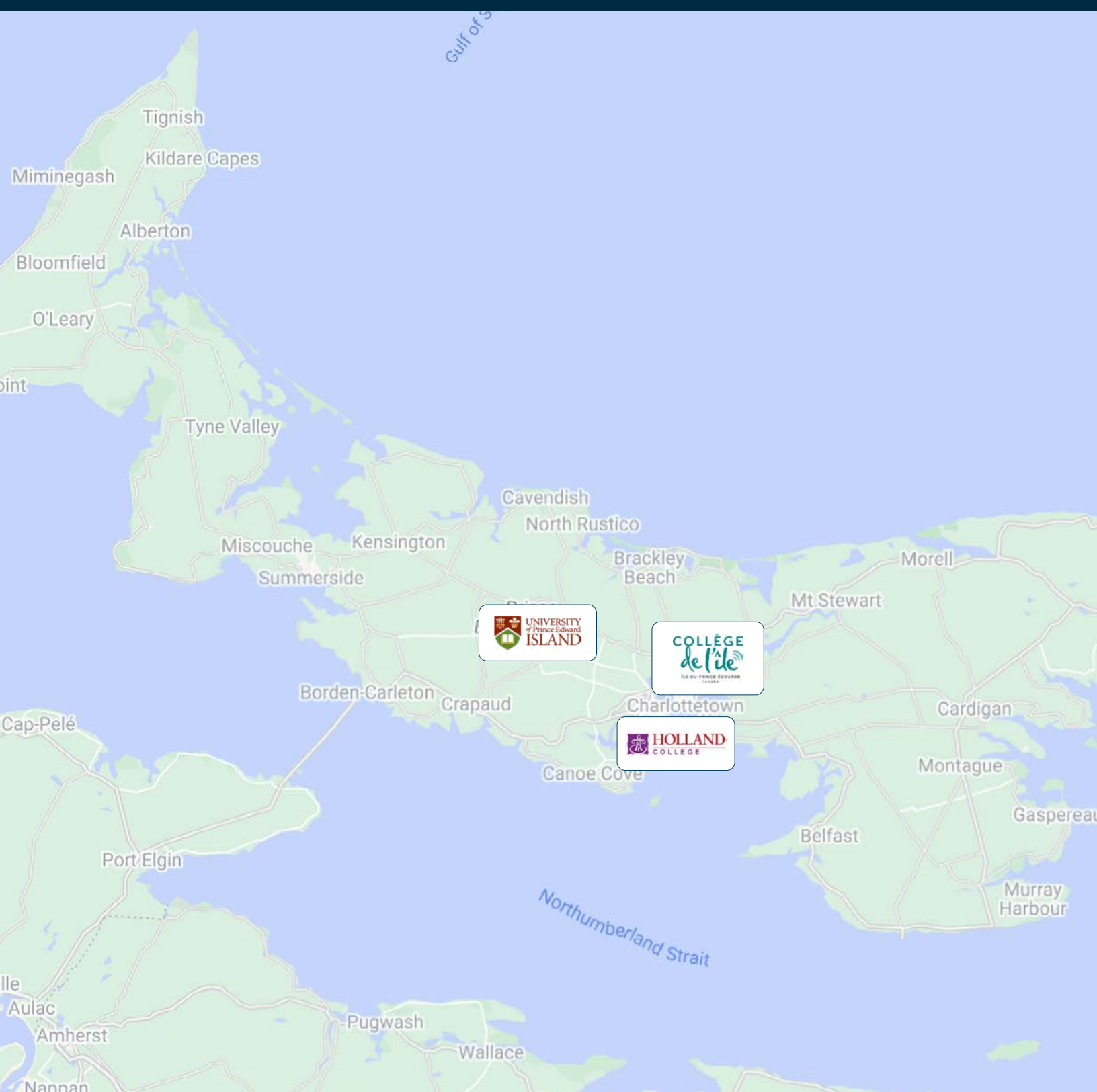
Government policy has kept tuition fees well below those in the rest of Canada for over two decades. As in most of Canada, provincial student assistance is meeting a declining share of overall aid provided to students over time. Total

student aid as a percentage of Gross Domestic Product has remained roughly constant over time, albeit at a lower level than the Canadian average, mainly due to lower tuition fees.



PROVINCIAL PROFILE

Prince Edward Island



STUDENTS

Enrolments in Prince Edward Island have lagged behind the rest of the country for most of the past two decades; however, in recent years the rush of international students has allowed

the province to catch up to the rest of the country in terms of enrolment growth, and it is the only Atlantic province to have done so.

Figure PE1: Total Postsecondary Enrolments by Sector, Prince Edward Island, 2000-01 to 2024-25

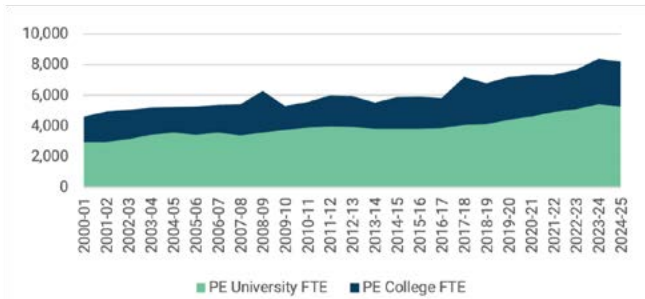


Figure PE2: Total Postsecondary Enrolments by Sector, Canada, 2000-01 to 2024-25

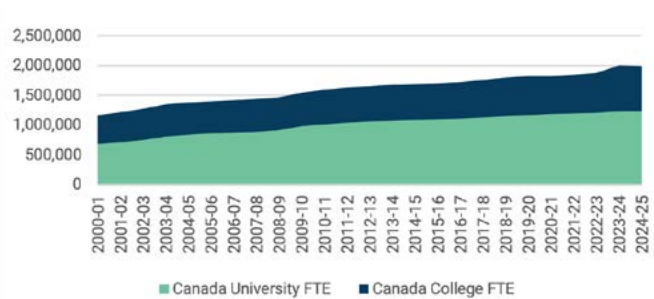


Figure PE3: International Student as a Percentage of Total College Enrolments, Canada vs. Prince Edward Island, 2000-01 to 2023-24

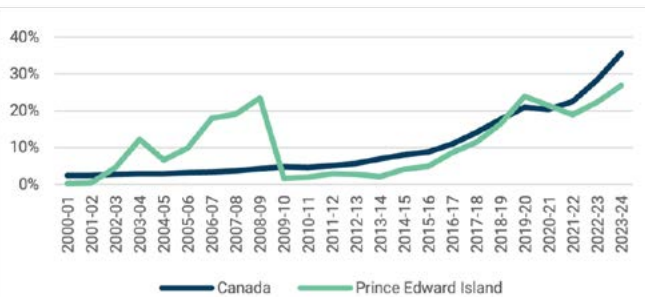
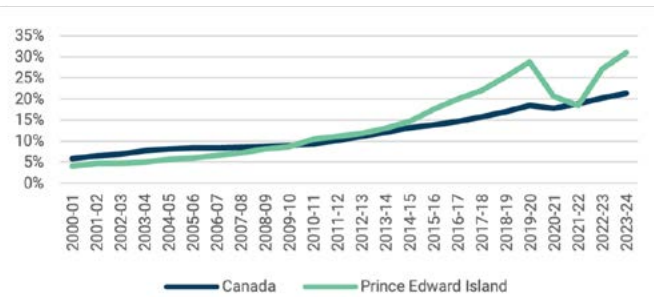


Figure PE4: International Student as a Percentage of Total University Enrolments, Canada vs. Prince Edward Island, 2000-01 to 2023-24



INSTITUTIONAL INCOME

PEI does not deviate much from the national pattern in terms of the mix of institutional funding. Per-student income patterns are somewhat better than the national average for both universities and colleges. Government support rose in the

2000s but then stagnated in the 2010s, and those funds were partially replaced with rising fee revenues from international students.

Figure PE5: Total University and College Income by Source, Prince Edward Island, 2001-02 to 2024-25 in Millions, in \$2024

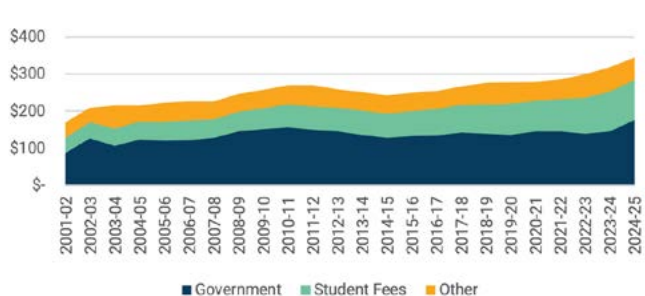
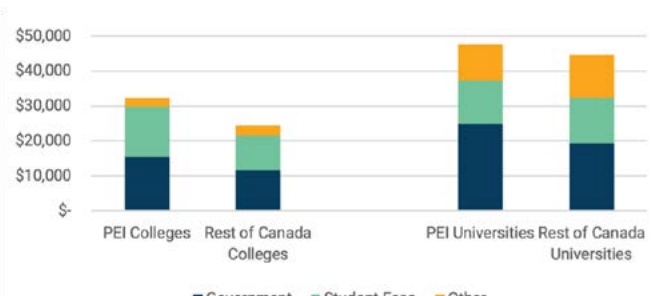


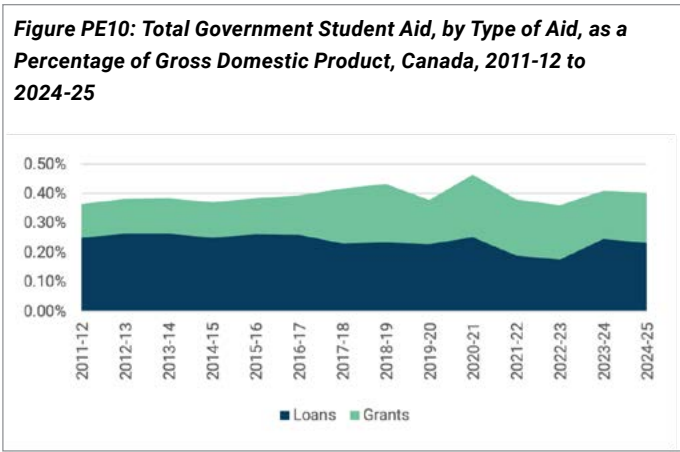
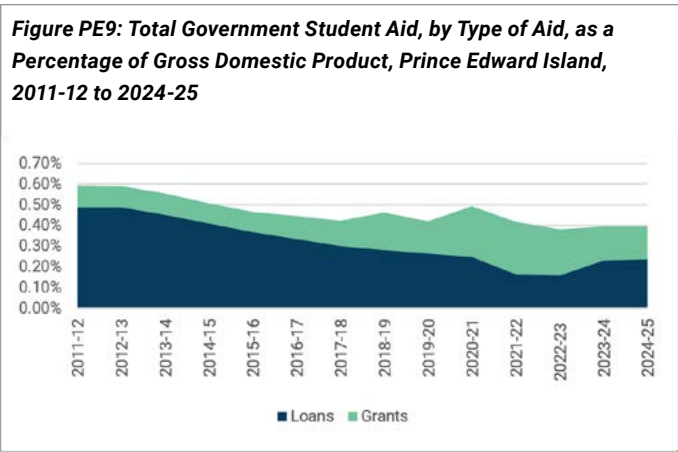
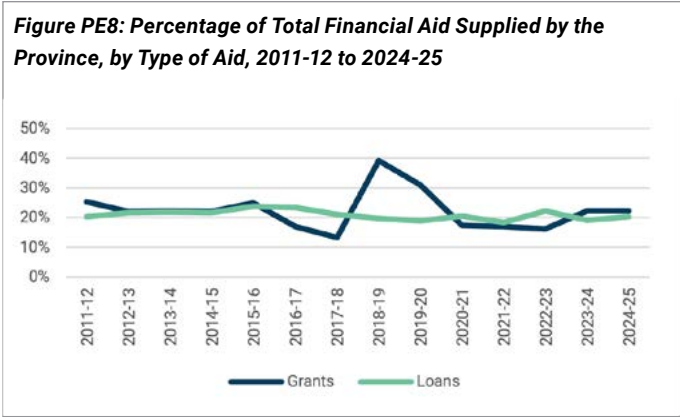
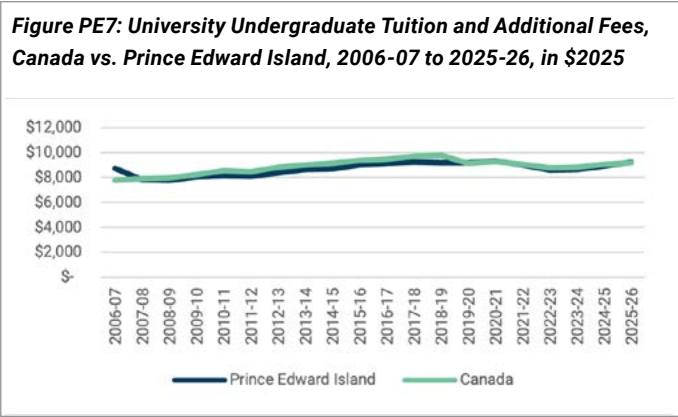
Figure PE6: Total Income Per FTE Student, by Source and Type of Institution, Canada vs. Prince Edward Island, 2024-25



TUITION AND STUDENT AID

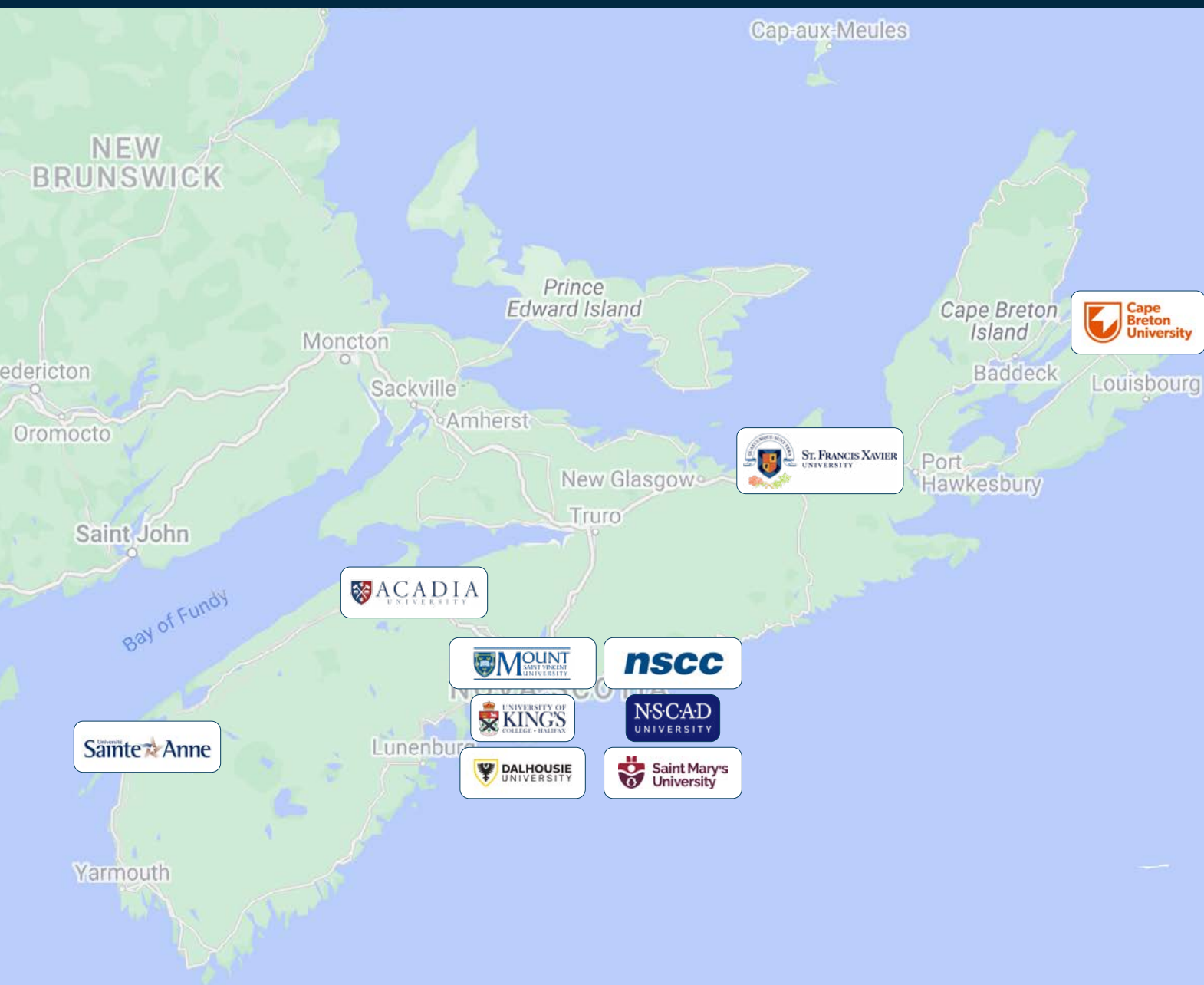
Tuition fees in PEI have hugged the national average very closely for the past 20 years. Student aid has become less generous over the past 20 years in GDP terms, mainly as a

result of a decrease in loans. The introduction of the Island Grant in 2018 strongly increased grant spending in the past few years but now displays a more stagnant trend.



PROVINCIAL PROFILE

Nova Scotia



STUDENTS

While enrolments in Nova Scotia have inched up slowly at both the university and college levels over the past two decades, the pace of growth lags the national trend. The province's universi-

ty sector has long been among the country's leaders in enrolling international students; the opposite is true in the college sector.

Figure NS1: Total Postsecondary Enrolments by Sector, Nova Scotia, 2000-01 to 2024-25

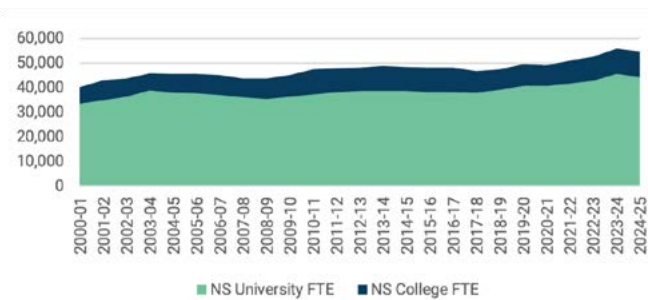


Figure NS2: Total Postsecondary Enrolments by Sector, Canada, 2000-01 to 2024-25

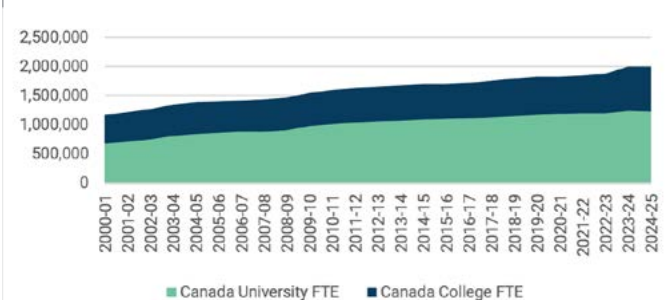


Figure NS3: International Students as a Percentage of Total College Enrolments, Canada vs. Nova Scotia, 2000-01 to 2023-24

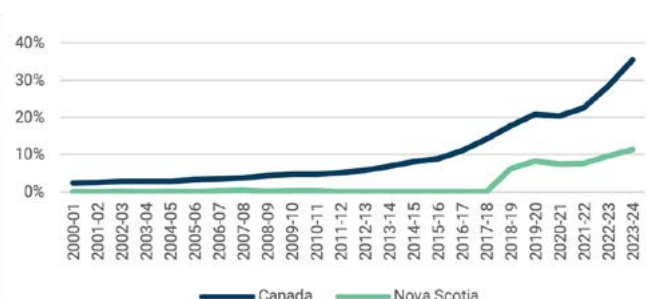
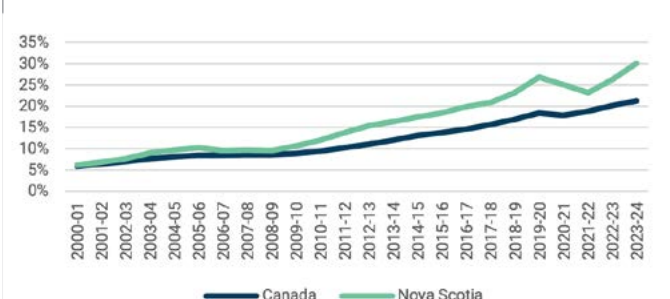


Figure NS4: International Students as a Percentage of Total University Enrolments, Canada vs. Nova Scotia, 2000-01 to 2023-24



INSTITUTIONAL INCOME

Nova Scotia universities have per-student income patterns only slightly below the rest of Canada, while Nova Scotia colleges are better-funded than the national average. As in most provinces, total government funding has stagnated since

2008, but Nova Scotian institutions have kept income growing through other means. Of total institutional funding in Nova Scotia, less than 45% now comes from governments.

Figure NS5: Total University and College Income by Source, Nova Scotia, 2001-02 to 2024-25 in Billions, in \$2024

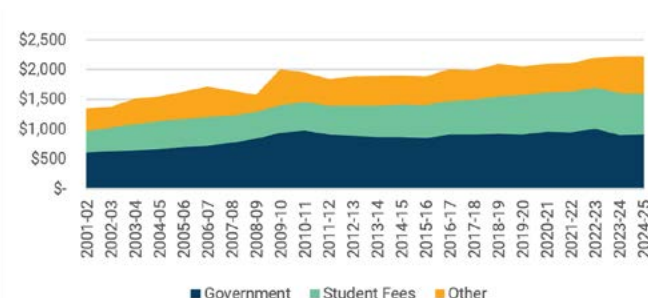
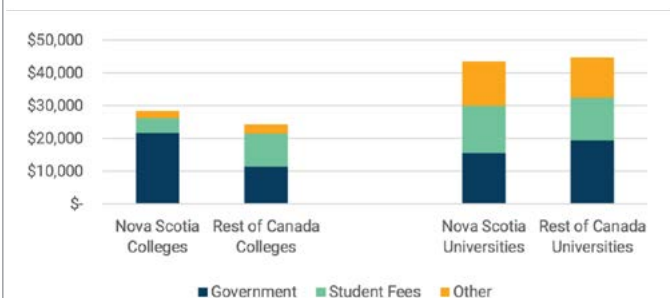
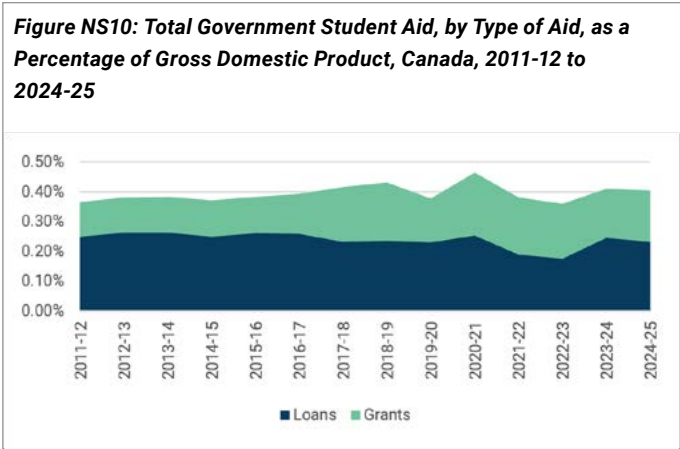
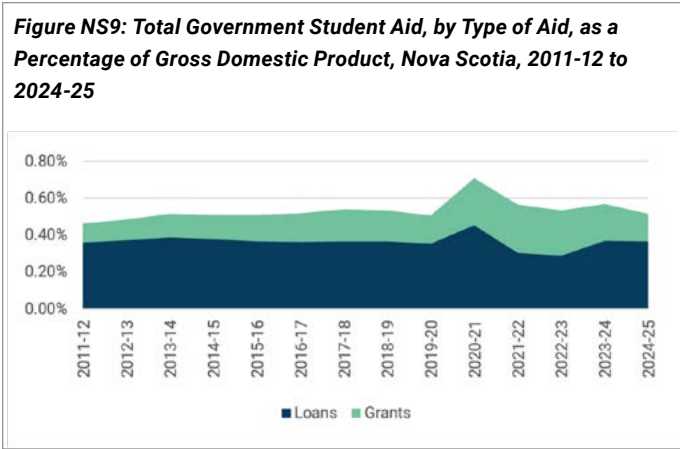
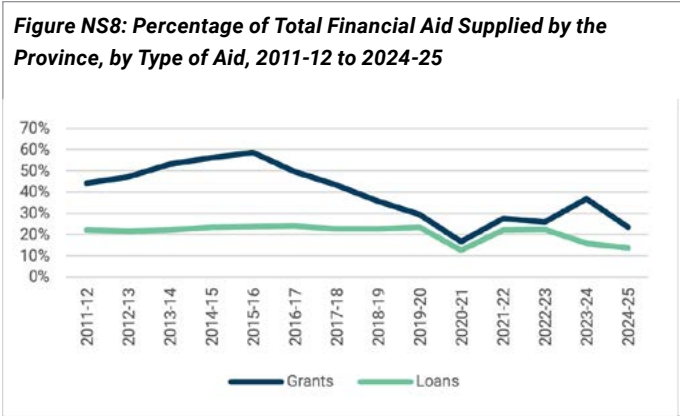
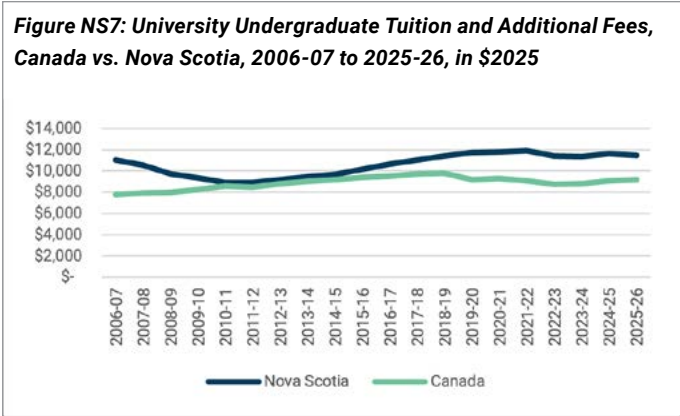


Figure NS6: Total Income Per FTE Student, by Source and Type of Institution, Canada vs. Nova Scotia, 2024-25



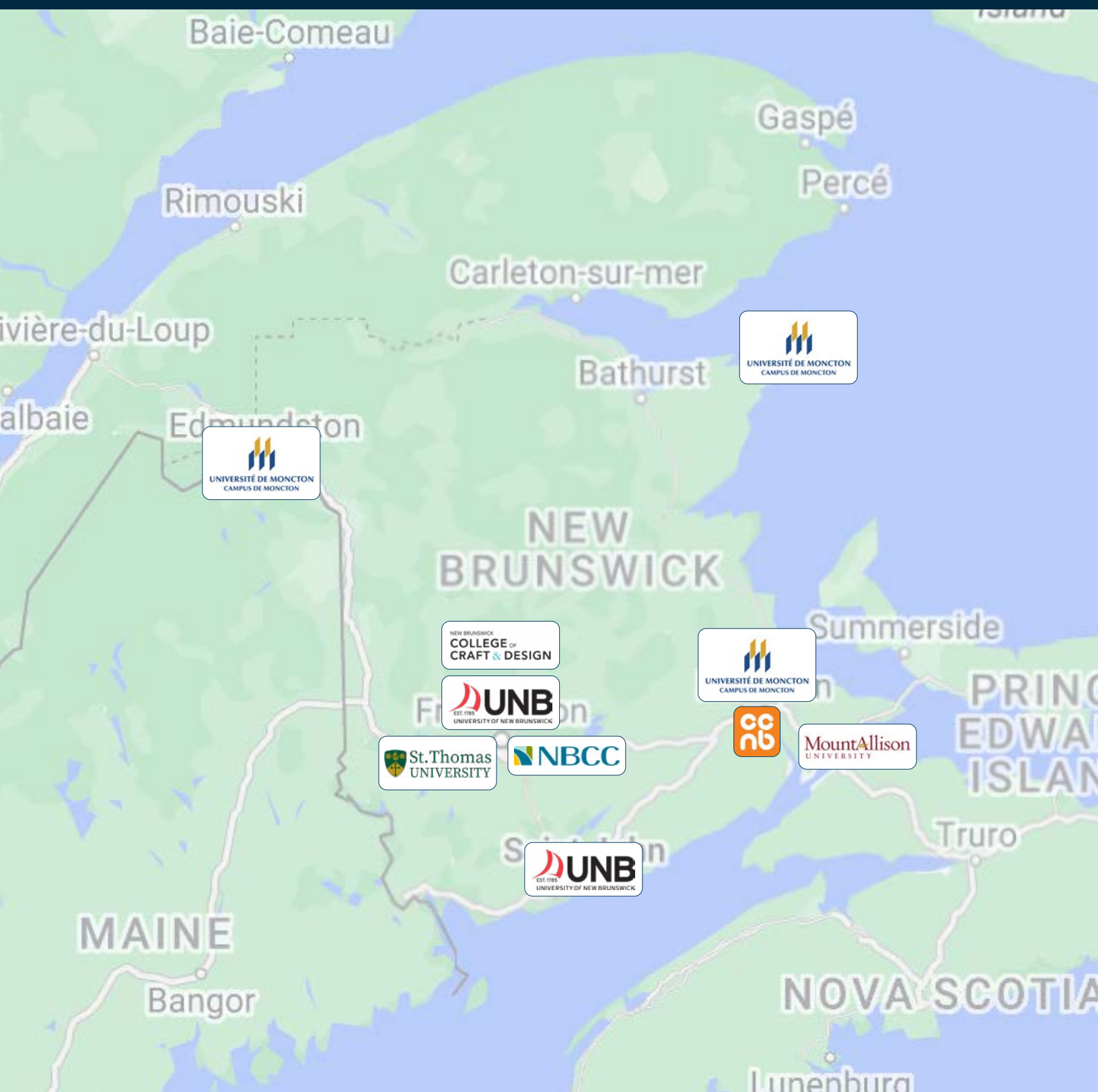
TUITION AND STUDENT AID

Undergraduate tuition fees in Nova Scotia are the highest in the country. Student aid in Nova Scotia is more loan-dependent than the national average, and more dependent on the federal government to deliver those loans.



PROVINCIAL PROFILE

New Brunswick



STUDENTS

New Brunswick is the only province in Canada which has seen large-scale enrolment declines over the past 20 years, although number have bounced back somewhat since COVID, mainly

due to strong increases in international student recruitment, particularly at the college level.

Figure NB1: Total Postsecondary Enrolments by Sector, New Brunswick, 2000-01 to 2024-25

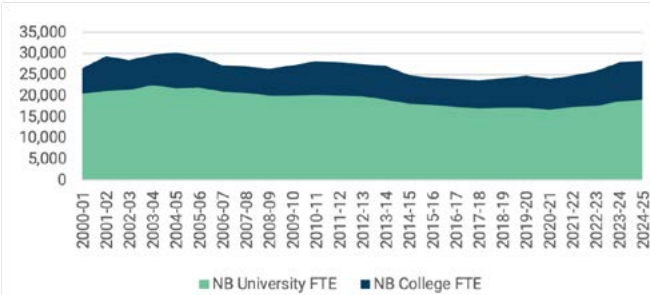


Figure NB2: Total Postsecondary Enrolments by Sector, Canada, 2000-01 to 2024-25

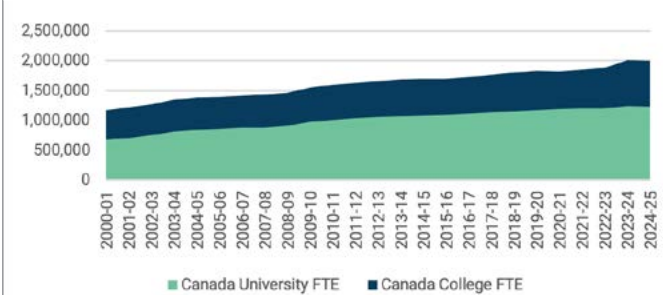


Figure NB3: International Students as a Percentage of Total College Enrolments, Canada vs. New Brunswick, 2000-01 to 2023-24

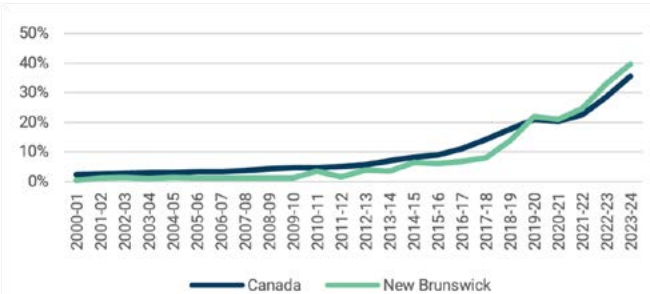
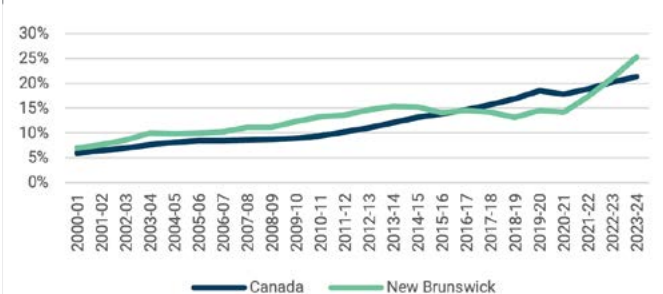


Figure NB4: International Students as a Percentage of Total University Enrolments, Canada vs. New Brunswick, 2000-01 to 2023-24



INSTITUTIONAL INCOME

Real total funding for New Brunswick universities is roughly where it was in the mid-2000s, both in composition and total amounts. Institutional per-student income rests close to the national average for both colleges and universities.

Figure NB5: Total University and College Income by Source, New Brunswick, 2001-02 to 2024-25 in Billions, in \$2024

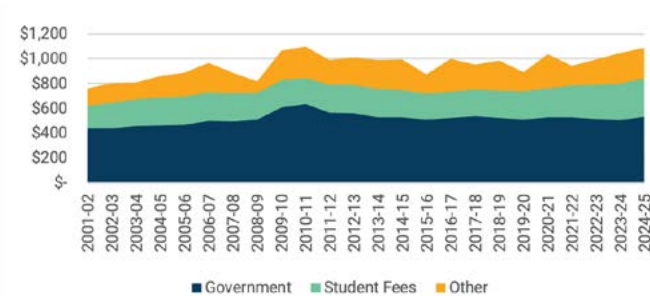
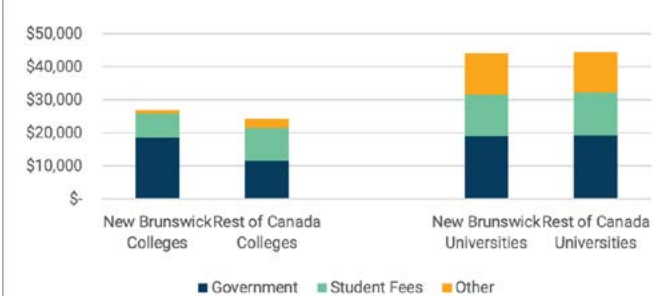
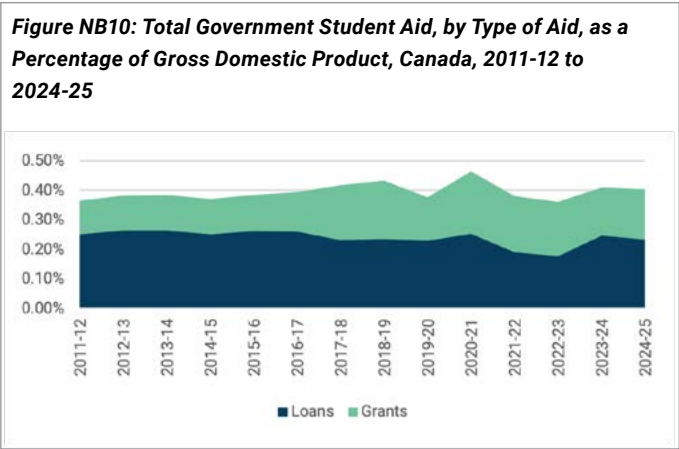
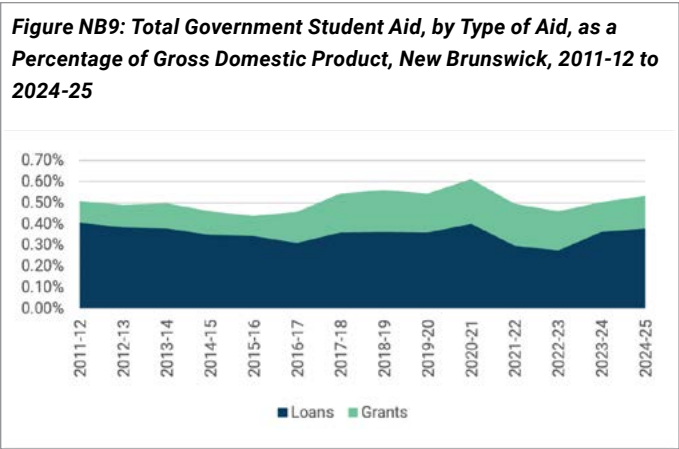
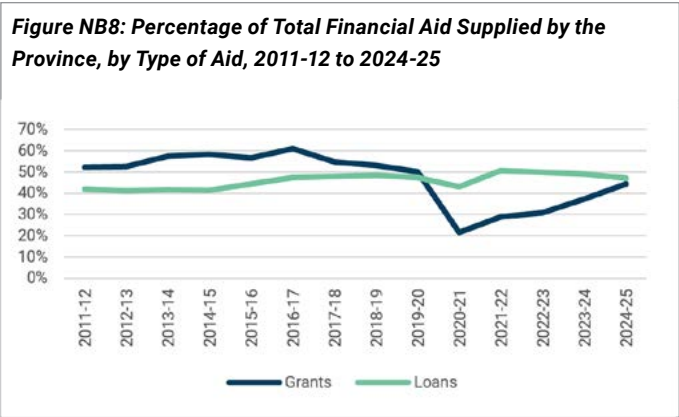
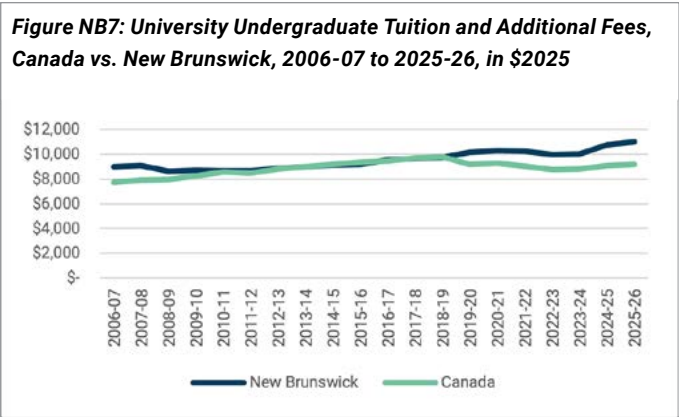


Figure NB6: Total Income Per FTE Student, by Source and Type of Institution, Canada vs. New Brunswick, 2024-25

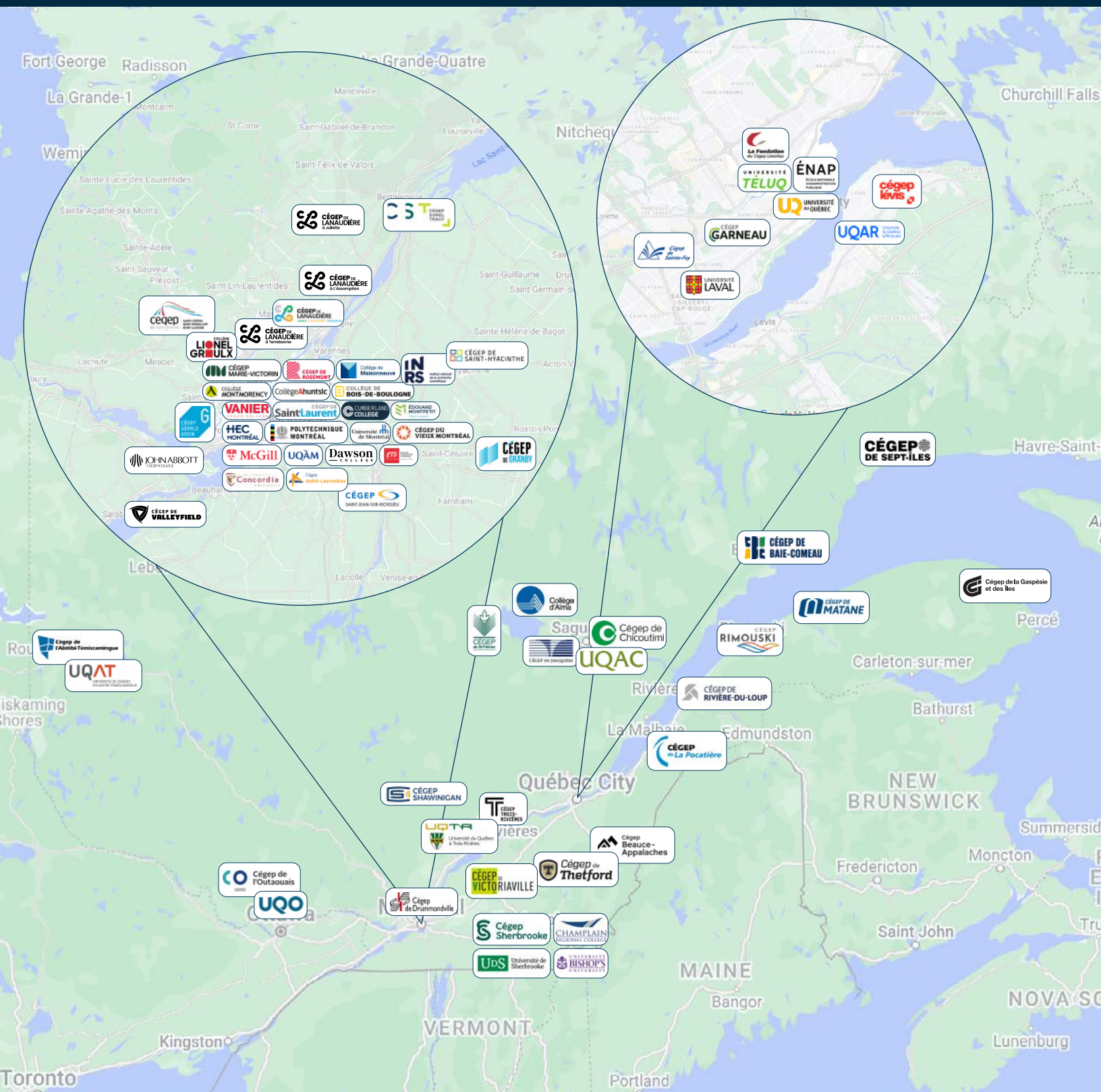


TUITION AND STUDENT AID

New Brunswick’s tuition fee levels have been drifting higher compared to national levels in recent years and are now the second-highest in the country. Total student aid disbursements (in GDP terms) tend to hew closely to the national average.



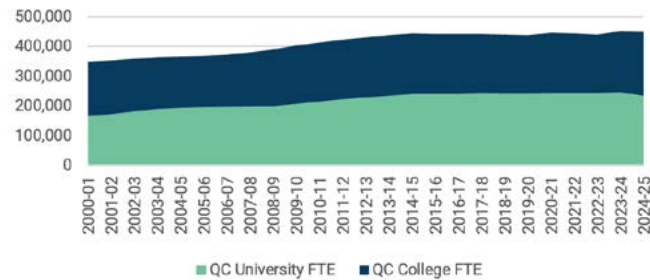
Québec



STUDENTS

Due to its unique college system, total enrolments in Quebec tilt more heavily to the college side than in other provinces. Growth in total enrolments was steady but unspectacular until about 2013 but since then has been stagnant or shrinking.

Figure QC1: Total Postsecondary Enrolments by Sector, Quebec, 2000-01 to 2024-25



International students enroll in the university system in numbers comparable to other provinces but are largely absent from the college system.

Figure QC2: Total Postsecondary Enrolments by Sector, Canada, 2000-01 to 2024-25

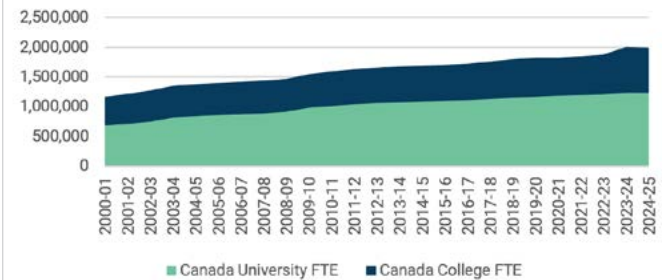


Figure QC3: International Students as a Percentage of Total College Enrolments, Canada vs. Quebec, 2000-01 to 2023-24

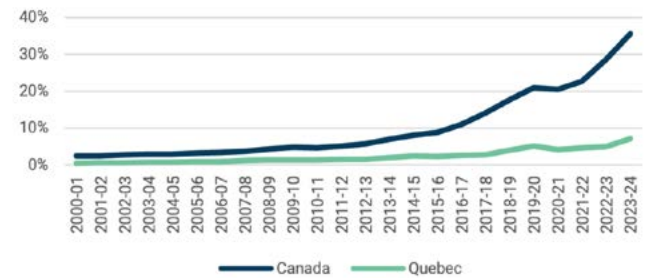
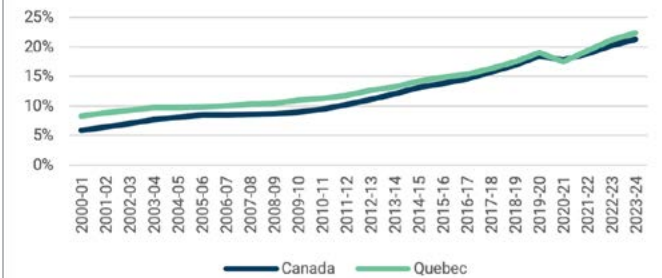


Figure QC4: International Students as a Percentage of Total University Enrolments, Canada vs. Quebec, 2000-01 to 2023-24



INSTITUTIONAL INCOME

Quebec universities and colleges are much more reliant on governments for revenue (70% of total) than the rest of the country. In part because of a reluctance to tap other revenue sources, Quebec colleges have lower total revenues per student than the rest of the country, despite very generous

public support. The university system, despite low tuition fees, is much better funded on a per-student basis than the rest of Canada. Moreover, unlike most of Canada, the Quebec system's total income has grown in recent years.

Figure QC5: Total University and College Income by Source, Quebec, 2001-02 to 2024-25 in Billions, in \$2024

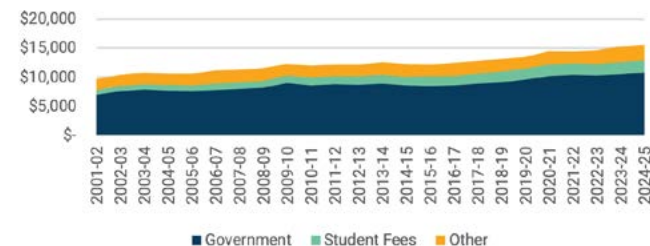
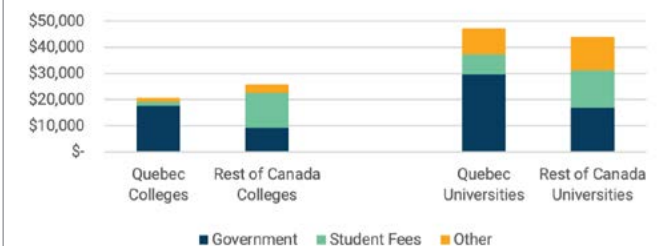
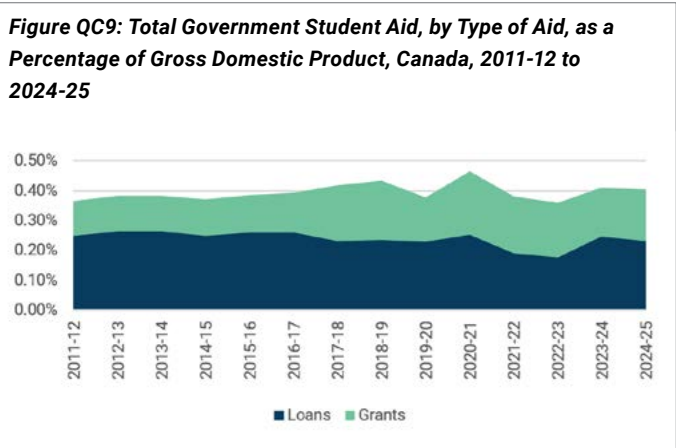
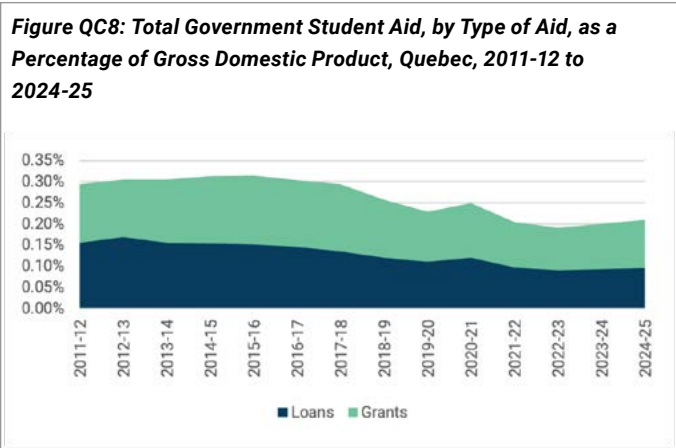
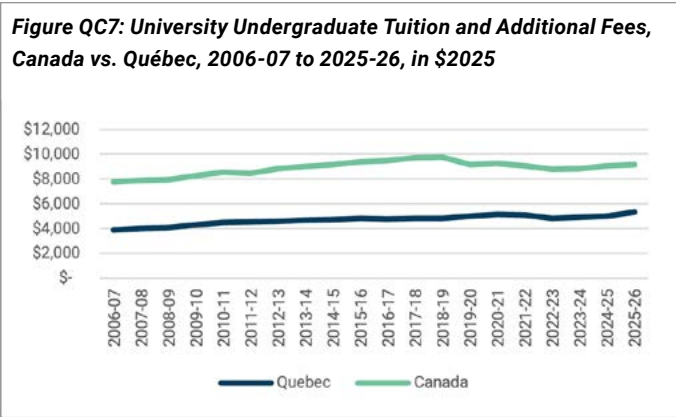


Figure QC6: Total Income Per FTE Student, by Source and Type of Institution, Canada vs. Quebec, 2024-25



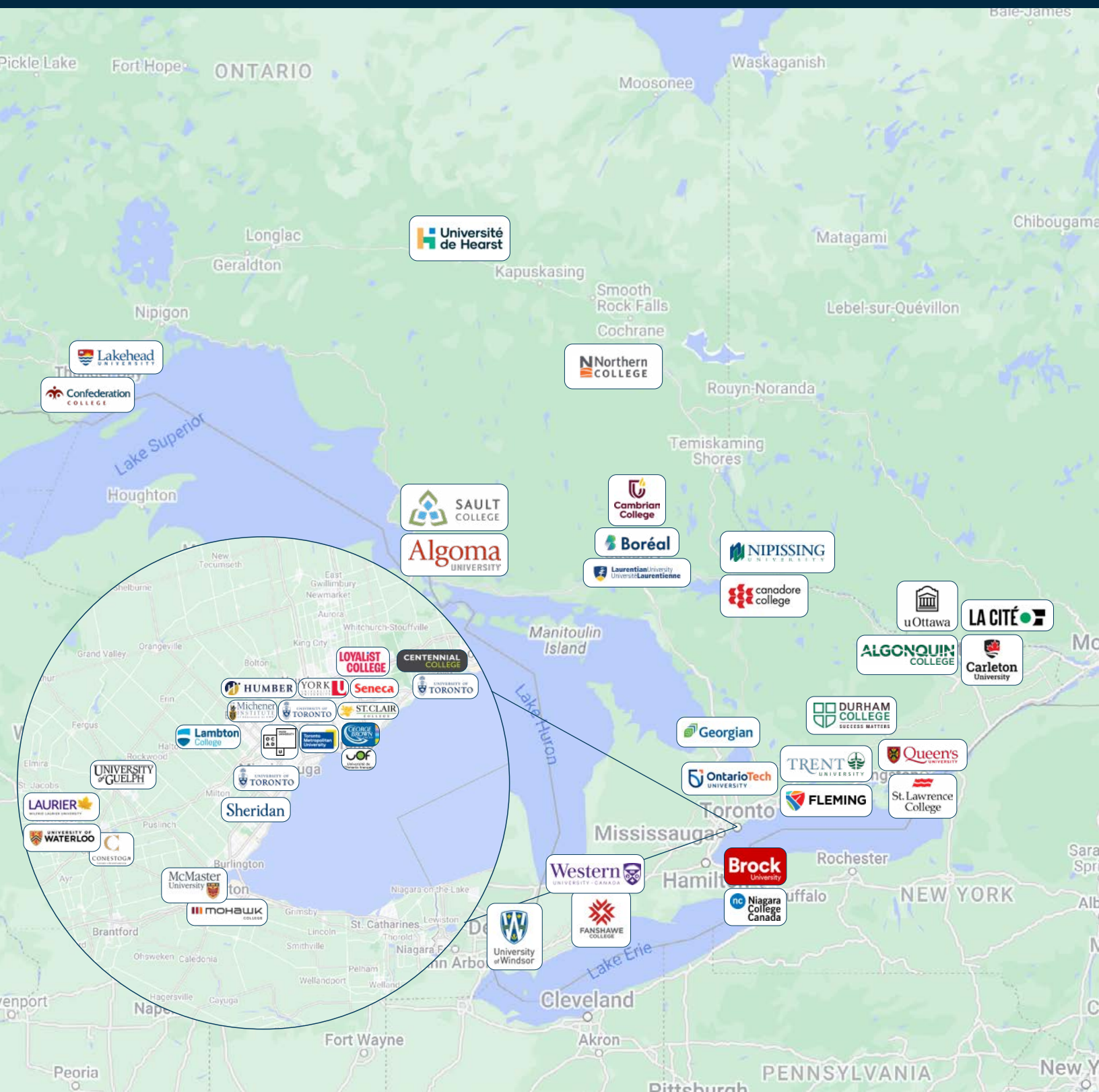
TUITION AND STUDENT AID

Undergraduate tuition fees in Quebec typically remain at about half of what they are on average in the country. Lower fees mean there is less demand for student aid, which is, consequently, smaller as a percentage of GDP than in other provinces. The student aid system is also less reliant on student loans than those in other parts of the country.



PROVINCIAL PROFILE

Ontario



STUDENTS

Enrolments in Ontario colleges and universities have doubled in the last 22 years, a pace much faster than the national average. International student numbers in Ontario universities are modestly behind national trends; however, in the college

sector international student numbers are well above national trends, with over half of all students in the system being from outside Canada in 2023-24.

Figure ON1: Total Postsecondary Enrolments by Sector, Ontario, 2000-01 to 2024-25

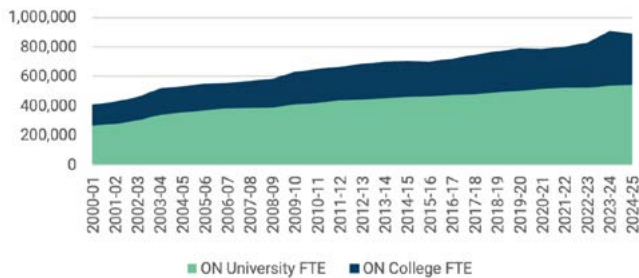


Figure ON2: Total Postsecondary Enrolments by Sector, Canada, 2000-01 to 2024-25

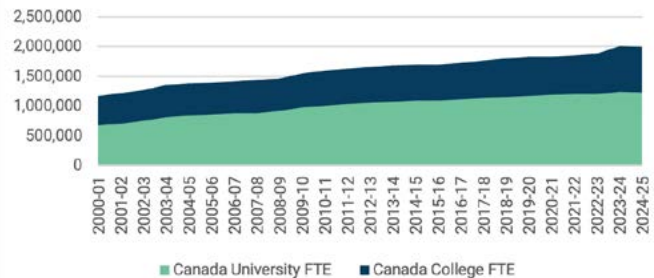


Figure ON3: International Students as a Percentage of Total College Enrolments, Canada vs. Ontario, 2000-01 to 2023-24

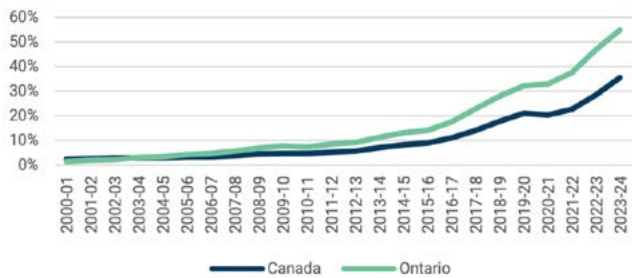
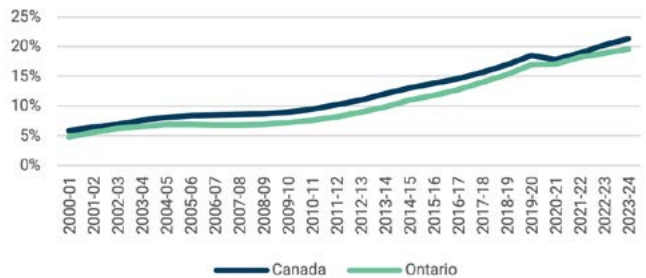


Figure ON4: International Students as a Percentage of Total University Enrolments, Canada vs. Ontario, 2000-01 to 2023-24



INSTITUTIONAL INCOME

Ontario institutions have posted strong total income growth since 2000, even as income from government has steadily declined since 2010. Two-thirds of all institutional income comes from non-government sources, which is the highest

rate in the country by far. This permits institutions in Ontario to have per-student incomes relatively close to the national average even though public funding is the weakest in the country by a considerable distance.

Figure ON5: Total University and College Income by Source, Ontario, 2001-02 to 2024-25 in Billions, in \$2024

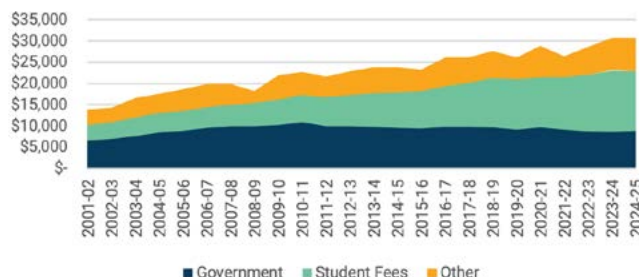
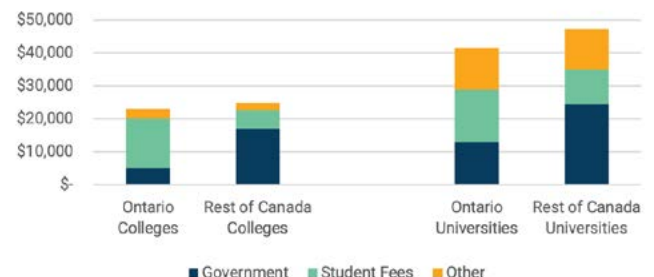


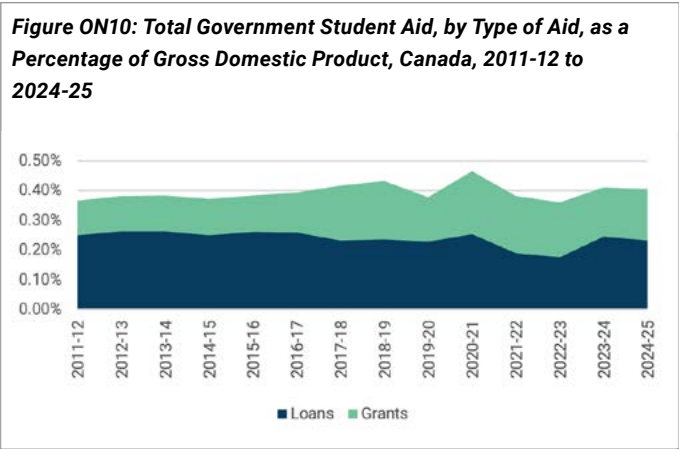
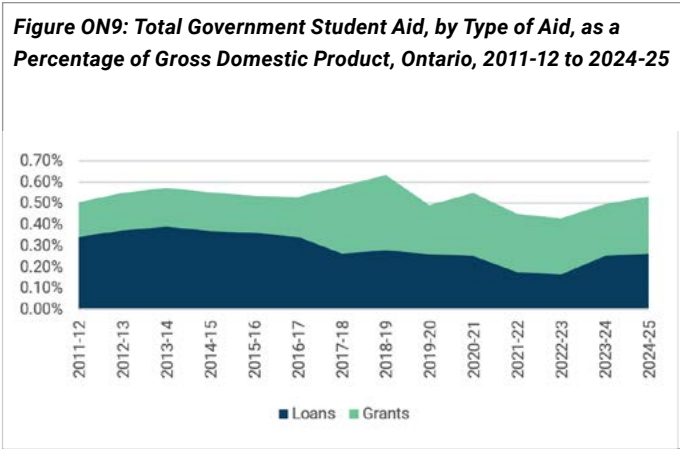
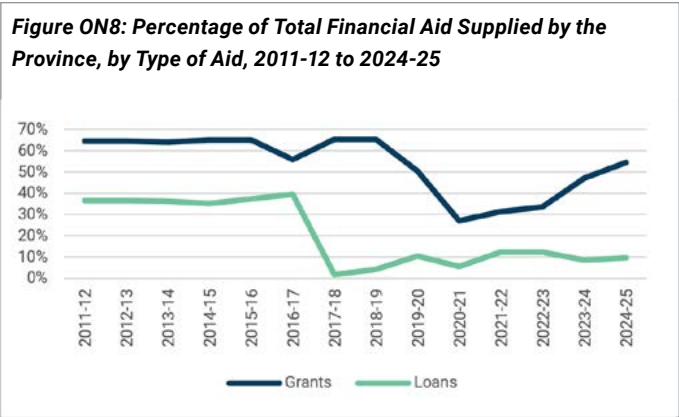
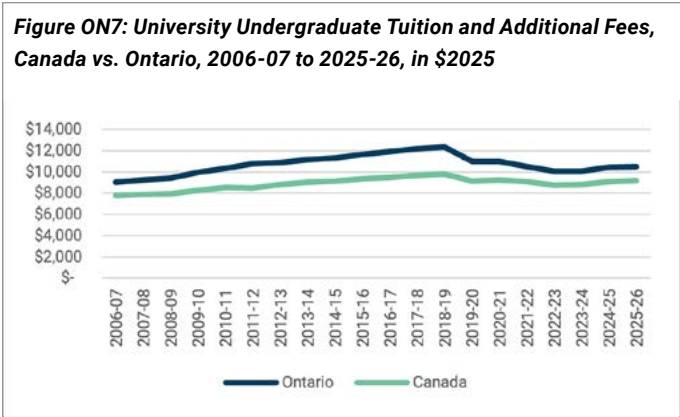
Figure ON6: Total Income Per FTE Student, by Source and Type of Institution, Canada vs. Ontario, 2024-25



TUITION AND STUDENT AID

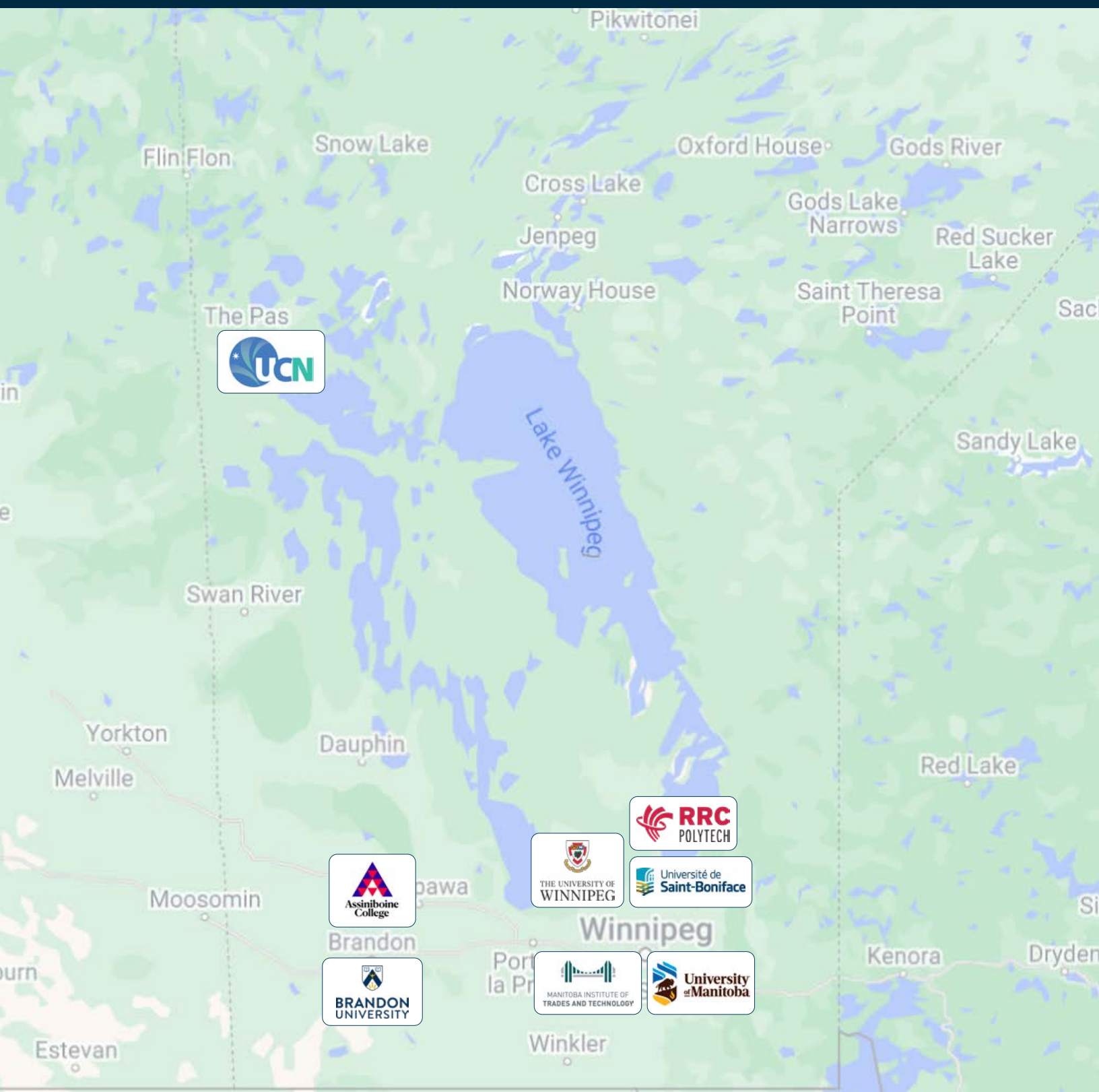
Undergraduate tuition fees in Ontario were the highest in the country in 2018 but have fallen substantially in real terms due to a prolonged tuition freeze. The student aid system is larger as a percentage of GDP than it is in most other provinces, precisely because it needs to cover higher tuition fees. The

province has had a few major system changes in the last decade, becoming significantly more generous with grants under Premier Wynne (almost eliminating provincial loans at one point) and then less generous under Premier Ford.



PROVINCIAL PROFILE

Manitoba



STUDENTS

Enrolments in Manitoba postsecondary institutions have risen by over 50% over the past two decades. This growth excludes a major increase in recorded college enrolment that is mainly

due to a change in methodology from Statistics Canada. International enrolment has also risen in recent years, in line with national trends.

Figure MB1: Total Postsecondary Enrolments by Sector, Manitoba, 2000-01 to 2024-25

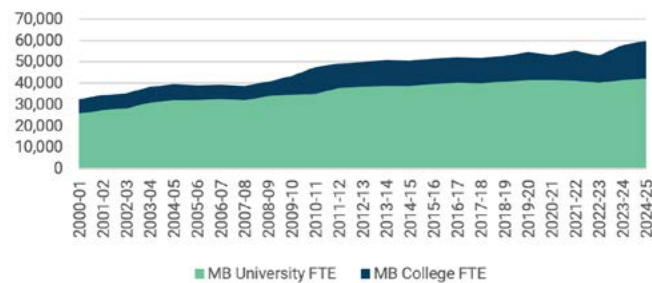


Figure MB2: Total Postsecondary Enrolments by Sector, Canada, 2000-01 to 2024-25

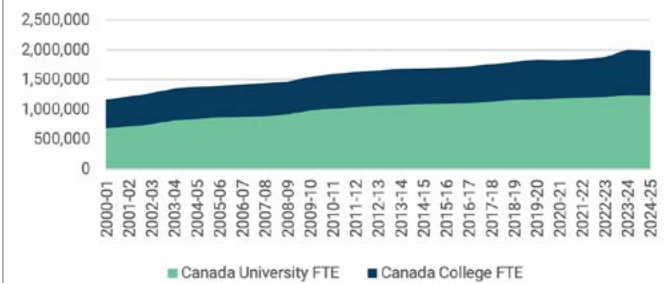


Figure MB3: International Students as a Percentage of Total College Enrolments, Canada vs. Manitoba, 2000-01 to 2023-24

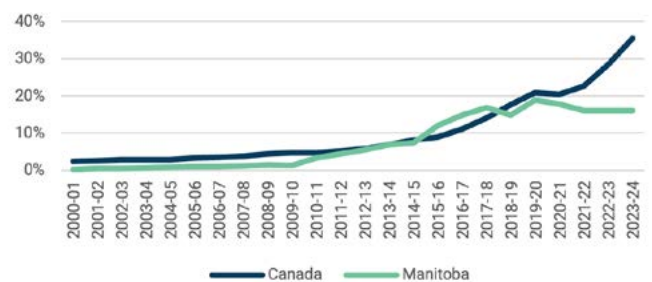
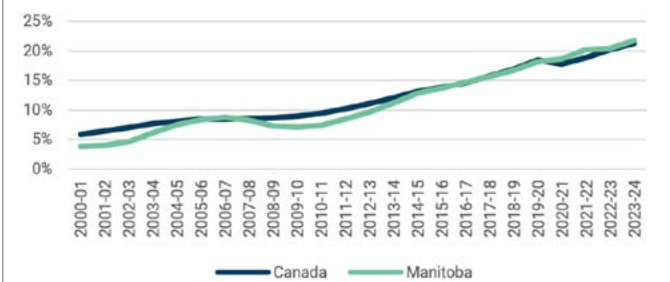


Figure MB4: International Students as a Percentage of Total University Enrolments, Canada vs. Manitoba, 2000-01 to 2023-24



INSTITUTIONAL INCOME

Following national trends, Manitoba postsecondary institutions saw stronger income growth in the 00s than in the 10s, mainly because provincial government expenditures ceased growing in real terms around 2011. Manitoba colleges have per-student income slightly above the national average, while

university per-student income is below the average. At the college level the gap is due to better per-student funding from government; at the university level it is because of a lower than national average per-student fee revenue.

Figure MB5: Total University and College Income by Source, Manitoba, 2001-02 to 2024-25 in Billions, in \$2024

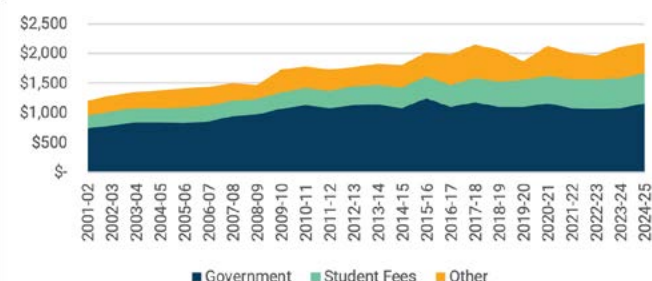
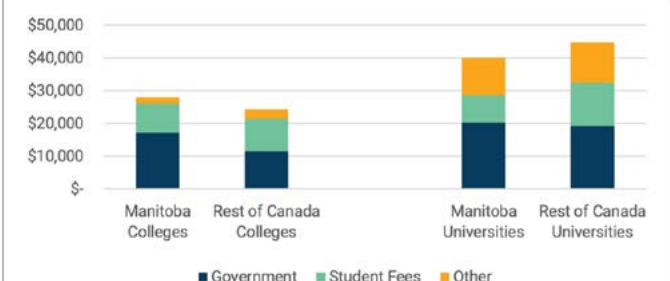


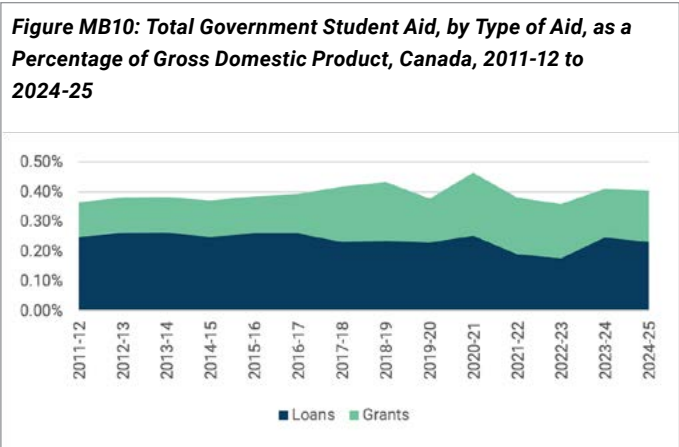
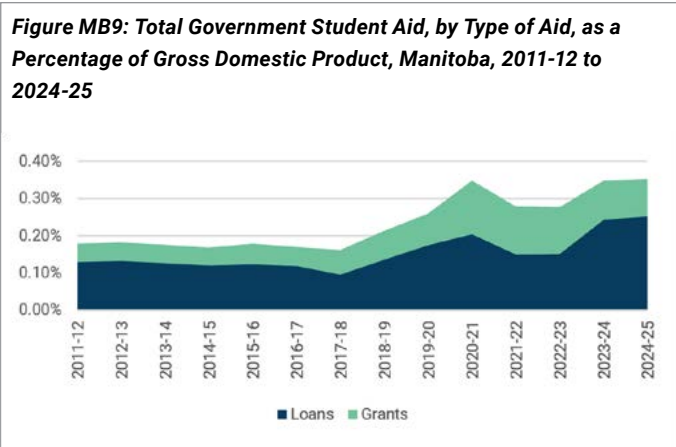
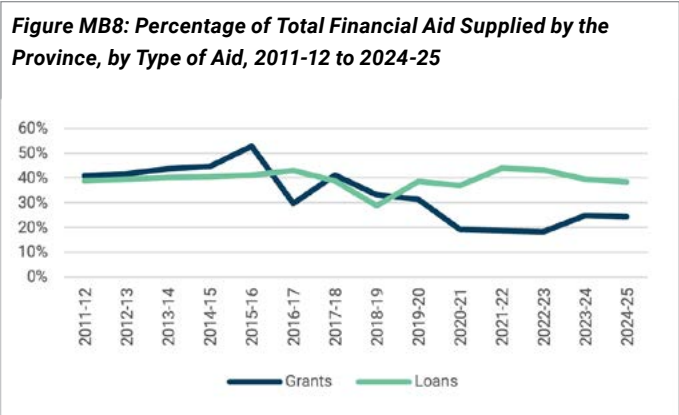
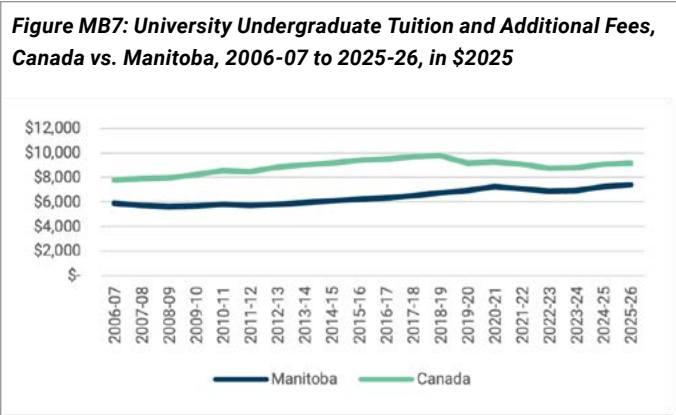
Figure MB6: Total Income Per FTE Student, by Source and Type of Institution, Canada vs. Manitoba, 2024-25



TUITION AND STUDENT AID

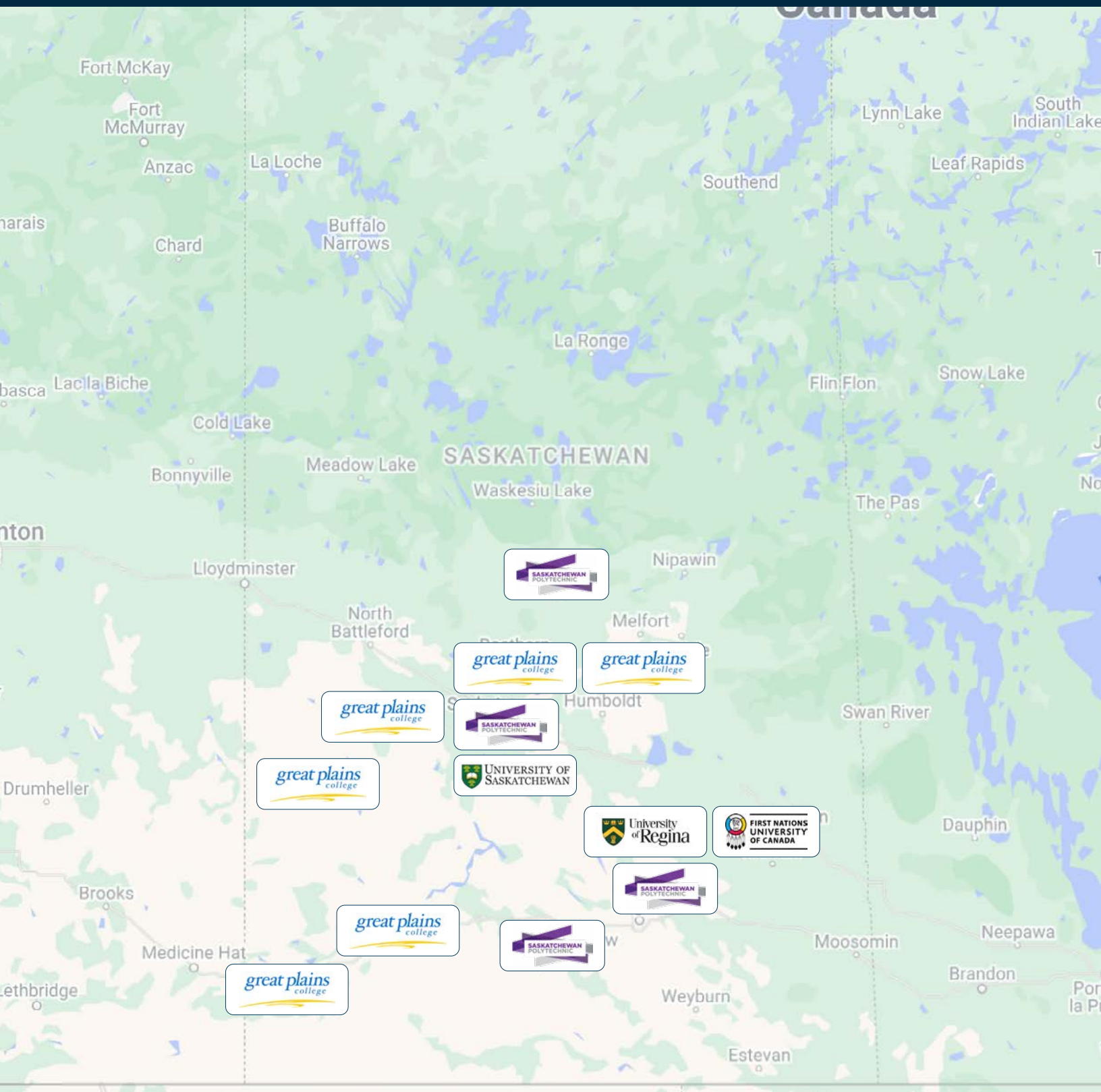
Manitoba’s undergraduate tuition fees are among the lowest in the country. Manitoba student aid has a similar loan-grant mix to the rest of the country but has lower levels of expenditures

both because tuition is moderate, and because most students live and study in Winnipeg, this reduces overall student costs and thus the amount aid is required.



PROVINCIAL PROFILE

Saskatchewan



STUDENTS

Enrolments in Saskatchewan have risen slowly over the past two decades, excluding a large jump in college enrolments in 2006 which are primarily the product of a methodological

change at Statistics Canada. International enrolments lag well behind the national average in both sectors, albeit more so for colleges than universities.

Figure SK1: Total Postsecondary Enrolments by Sector, Saskatchewan, 2000-01 to 2024-25

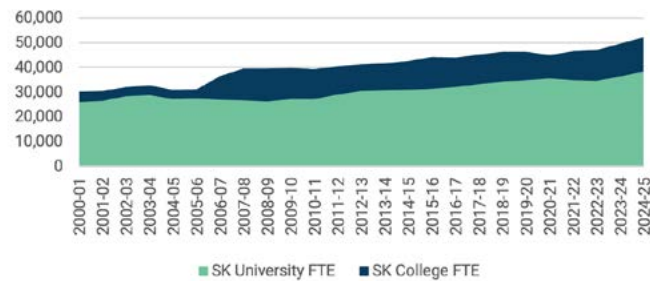


Figure SK2: Total Postsecondary Enrolments by Sector, Canada, 2000-01 to 2024-25

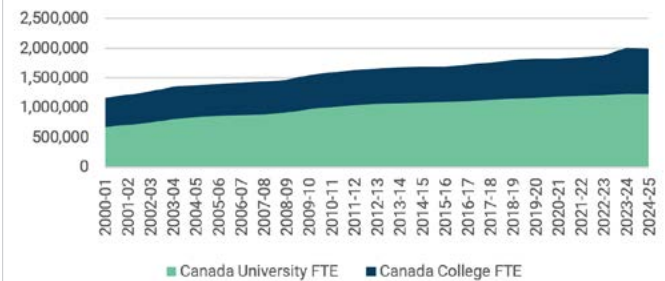


Figure SK3: International Students as a Percentage of Total College Enrolments, Canada vs. Saskatchewan, 2000-01 to 2023-24

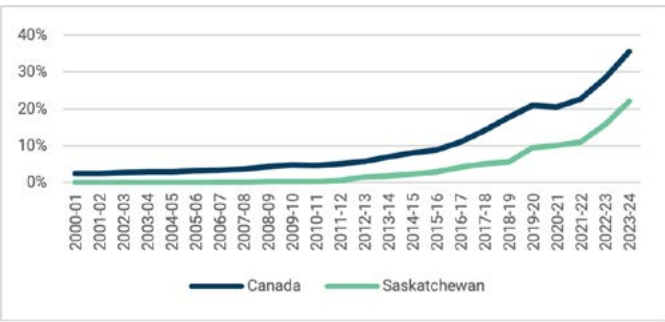
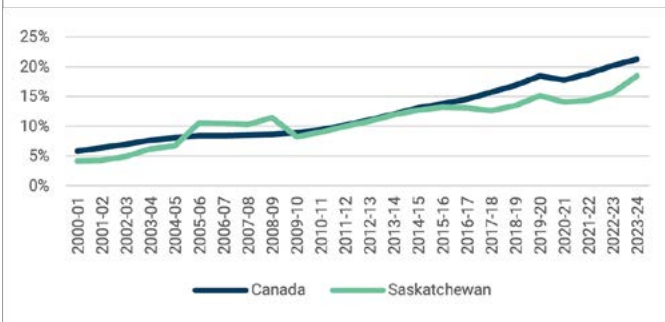


Figure SK4: International Students as a Percentage of Total University Enrolments, Canada vs. Saskatchewan, 2000-01 to 2023-24



INSTITUTIONAL INCOME

As in much of the country, Saskatchewan postsecondary institutions saw stronger income growth in the aughts than in the 10s, mainly because provincial government expenditures ceased growing in real terms around 2008. Both universities

and colleges in Saskatchewan have above-average per-student revenues, which is almost entirely driven by above-average spending by the provincial government.

Figure SK5: Total University and College Income by Source, Saskatchewan, 2001-02 to 2024-25 in Billions, in \$2024

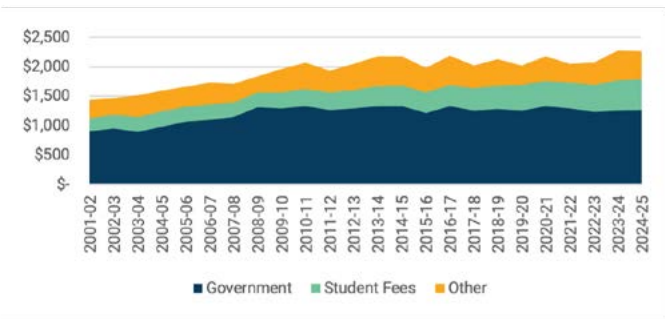
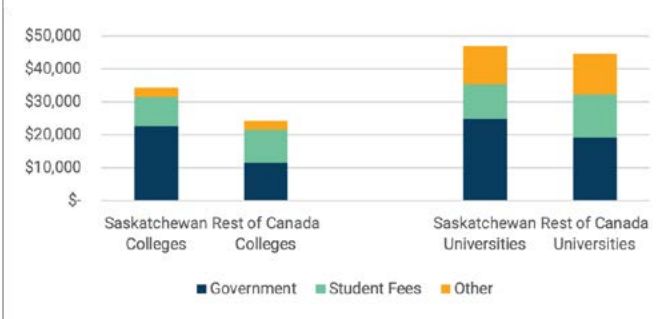
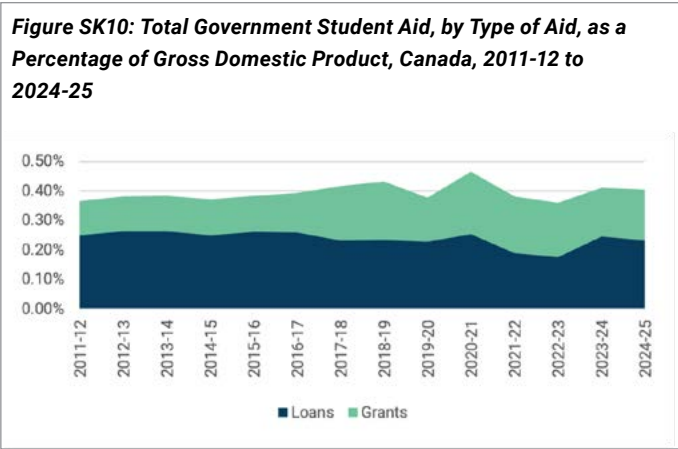
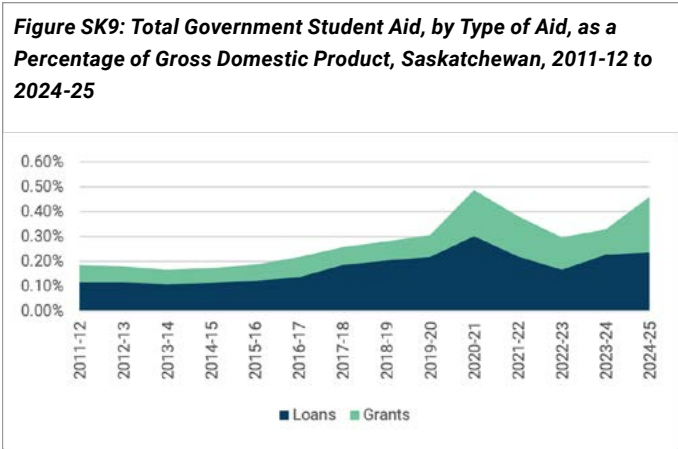
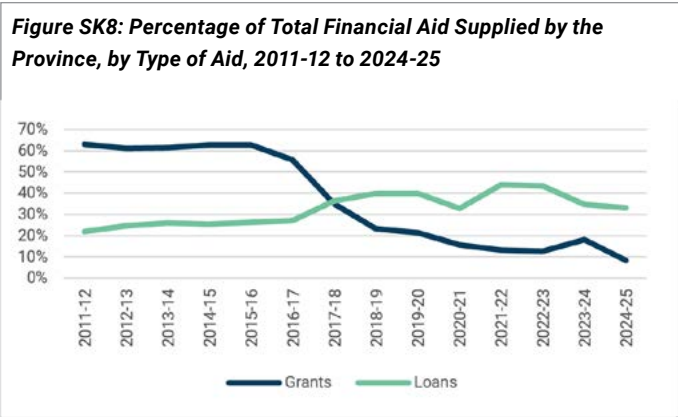
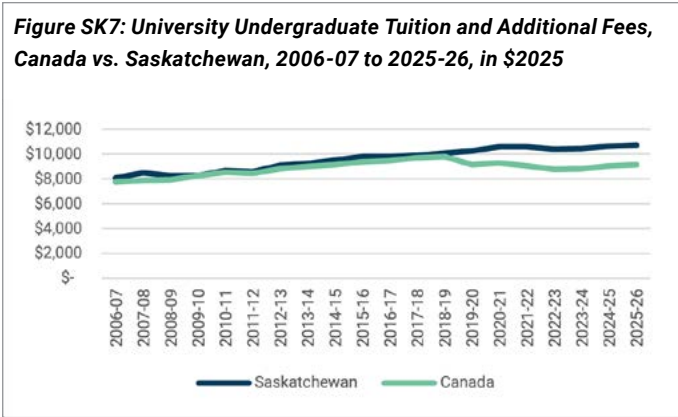


Figure SK6: Total Income Per FTE Student, by Source and Type of Institution, Canada vs. Saskatchewan, 2024-25



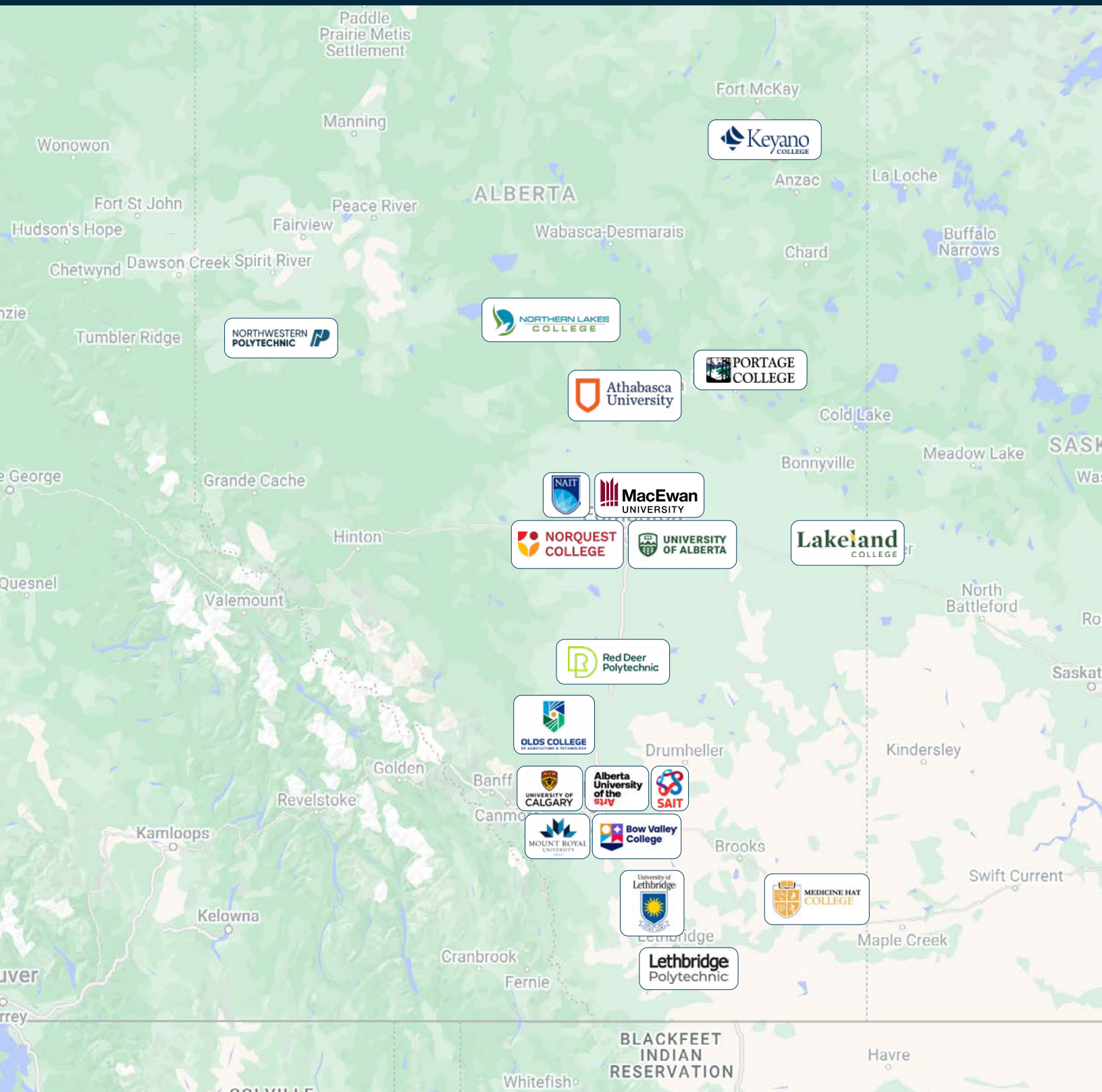
TUITION AND STUDENT AID

Undergraduate tuition fees in Saskatchewan are among the highest in the country. Student aid as a percentage of the economy has been rising in recent years, but this is more due to federal efforts than provincial ones, as the value of provincial grant aid has eroded over time.



PROVINCIAL PROFILE

Alberta



STUDENTS

Enrolment growth in Alberta outpaced the national growth over the past two decades, more so at the university than the college level because two institutions – Mount Royal and Grant MacEwan – changed status from college to university in

2008. International students are a smaller proportion of the student body at both the college and university levels in Alberta compared to the rest of the country.

Figure AB1: Total Postsecondary Enrolments by Sector, Alberta, 2000-01 to 2024-25

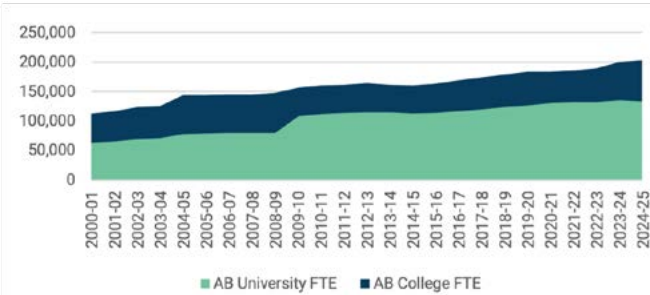


Figure AB2: Total Postsecondary Enrolments by Sector, Canada, 2000-01 to 2024-25

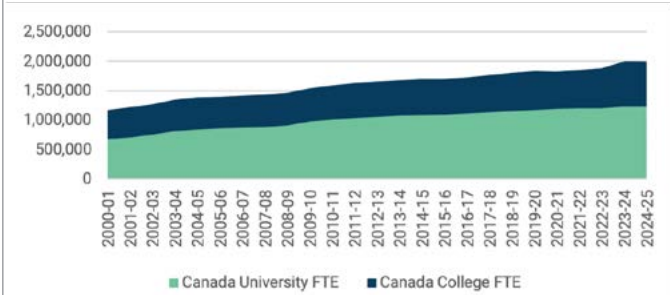


Figure AB3: International Students as a Percentage of Total College Enrolments, Canada vs. Alberta, 2000-01 to 2023-24

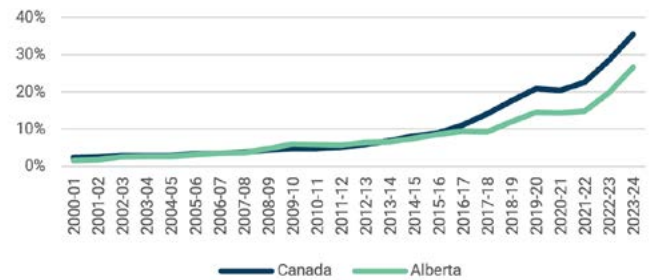
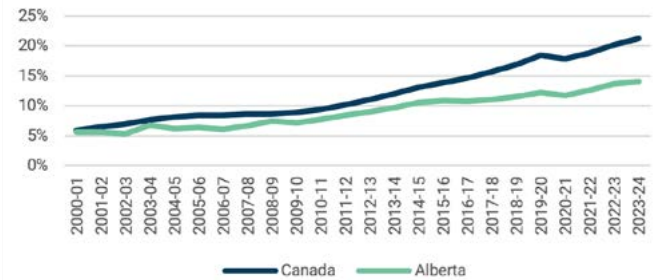


Figure AB4: International Students as a Percentage of Total University Enrolments, Canada vs. Alberta, 2000-01 to 2023-24



INSTITUTIONAL INCOME

Alberta universities' per-student income patterns are some lower in comparison to the rest of Canada, while Alberta colleges are slightly better-funded than the national average.

Government funding hit a peak in 2008 and has declined significantly since then.

Figure AB5: Total University and College Income by Source, Alberta, 2001-02 to 2024-25 in Billions, in \$2023

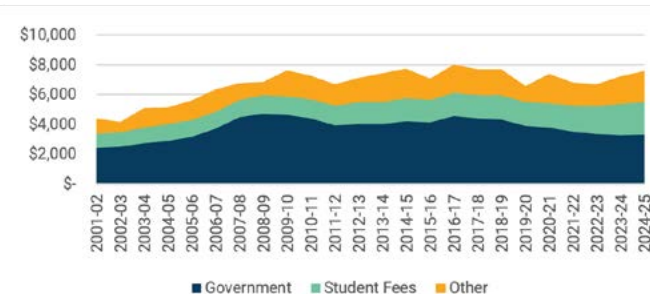
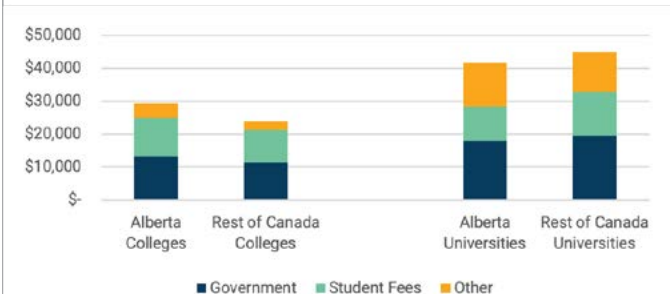
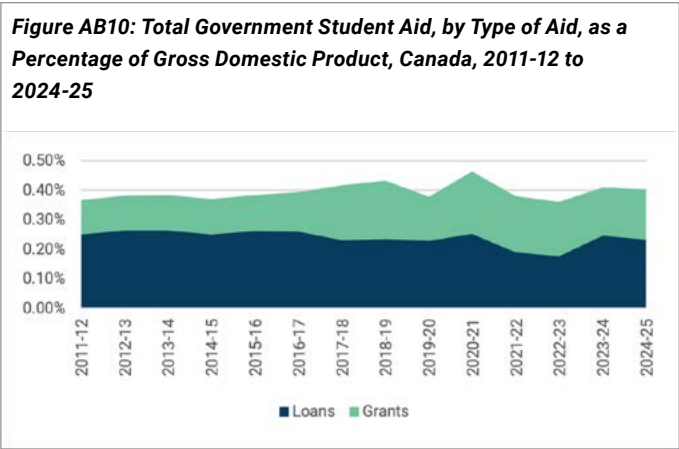
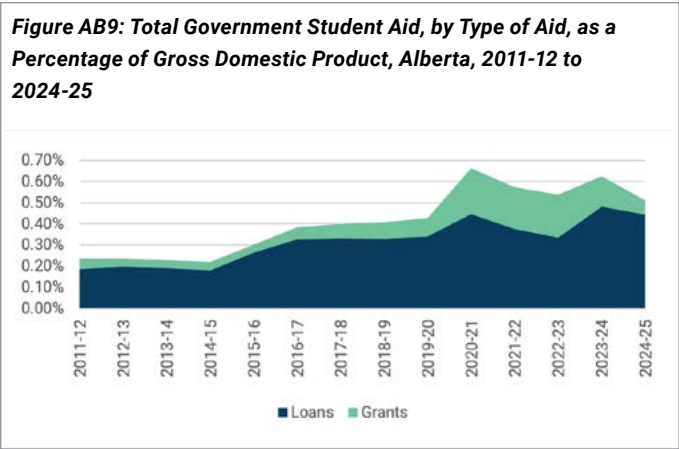
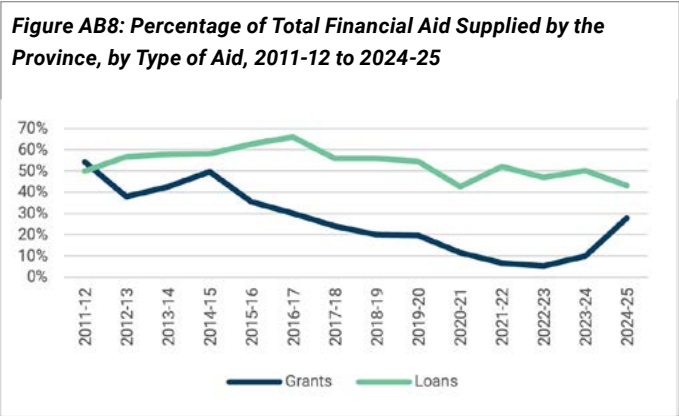
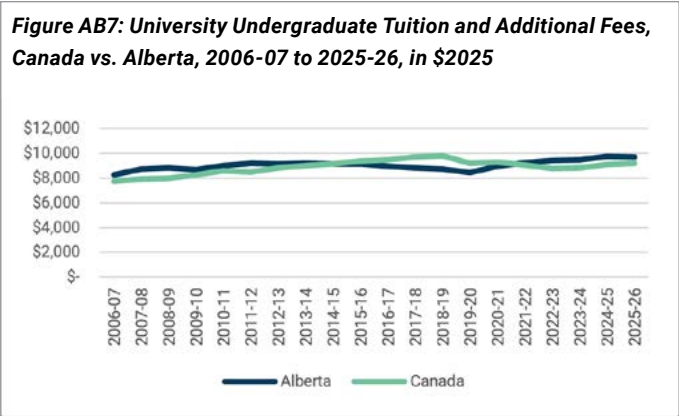


Figure AB6: Total Income Per FTE Student, by Source and Type of Institution, Canada vs. Alberta, 2024-25



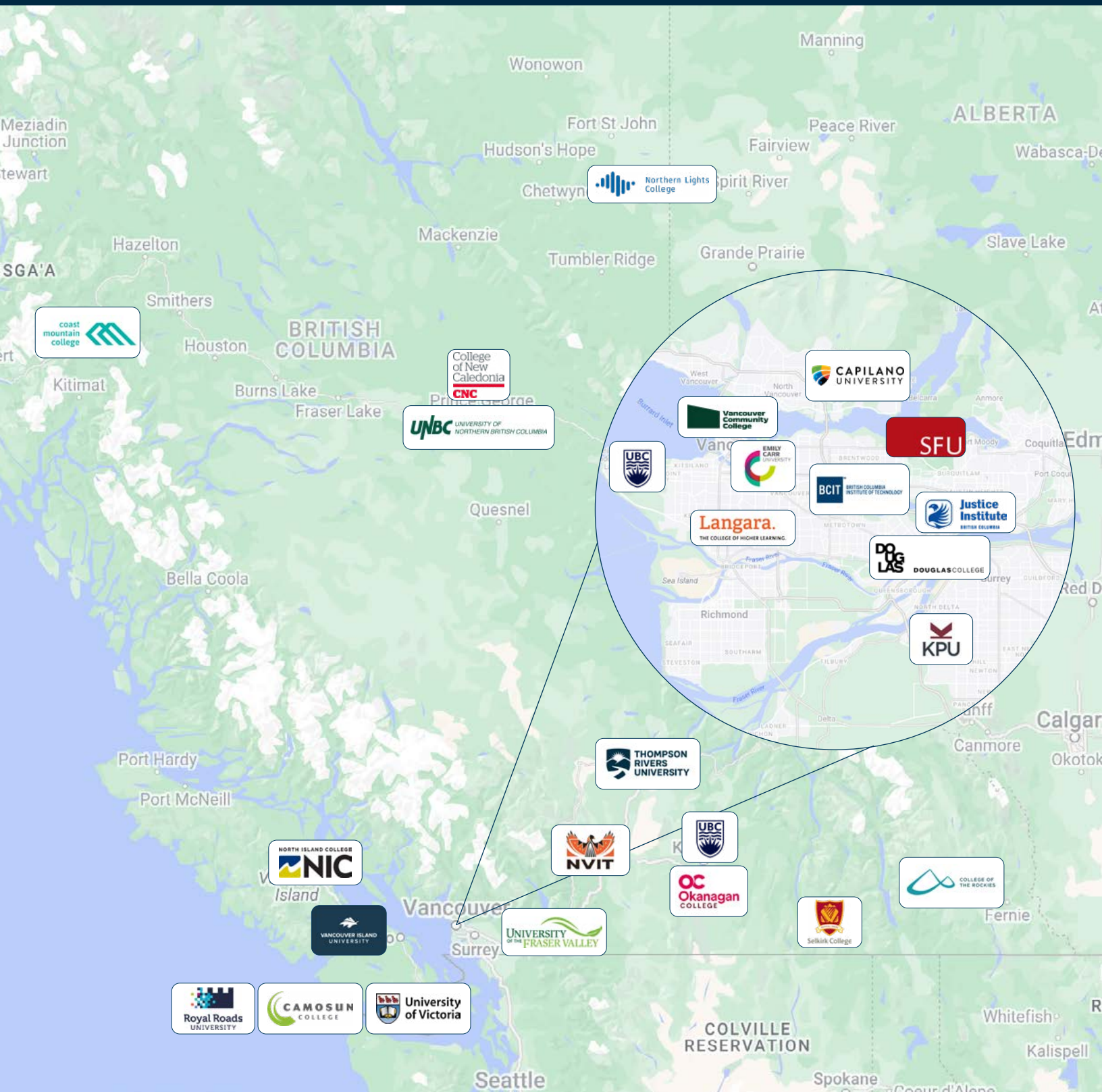
TUITION AND STUDENT AID

Undergraduate tuition fees in Alberta are slightly above the national average. Alberta student aid is more loan-reliant than other provinces, mainly due to policies which permit dependent students to borrow without reference to parental income.



PROVINCIAL PROFILE

British Columbia



STUDENTS

Enrolment growth in British Columbia matched the rest of the country over the past two decades. With the transition of several institutions from one status to the other in the mid-2000s, the

university numbers have grown more than the college ones. BC's university sector is more reliant on international students than the national average.

Figure BC1: Total Postsecondary Enrolments by Sector, British Columbia, 2000-01 to 2024-25

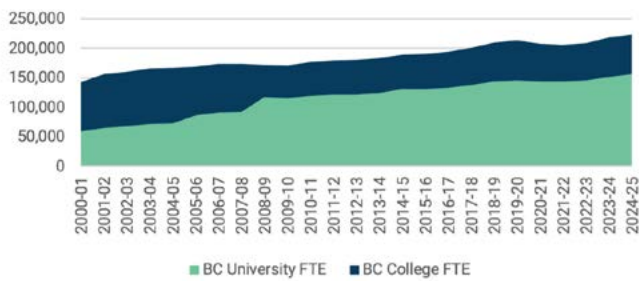


Figure BC2: Total Postsecondary Enrolments by Sector, Canada, 2000-01 to 2024-25

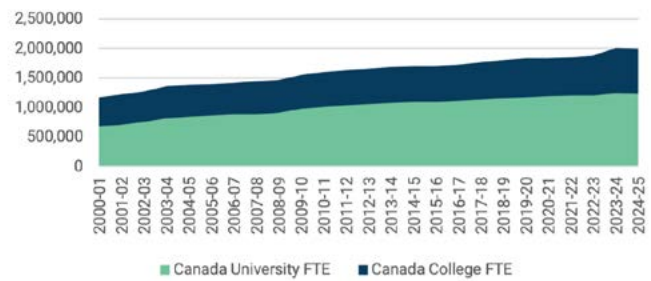


Figure BC3: International Students as a Percentage of Total College Enrolments, Canada vs. British Columbia, 2000-01 to 2023-24

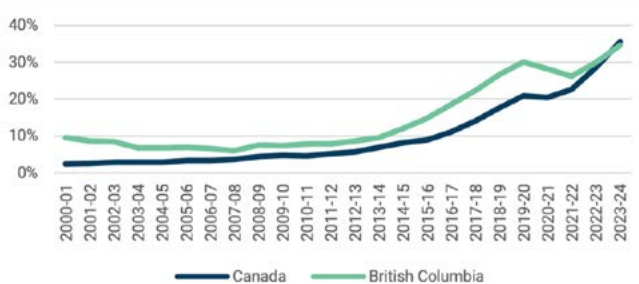
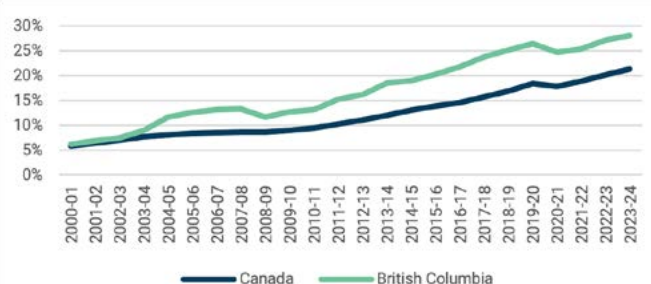


Figure BC4: International Students as a Percentage of Total University Enrolments, Canada vs. British Columbia, 2000-01 to 2023-24



INSTITUTIONAL INCOME

Funding for British Columbia postsecondary institutions has increased relatively steadily over the past two decades, which is unlike most other provinces. This is due to multiple factors,

as the provincial colleges and universities have above-average per-student revenues from governments, student fees, and other self-generated revenues.

Figure BC5: Total University and College Income by Source, British Columbia, 2001-02 to 2024-25 in Billions, in \$2024

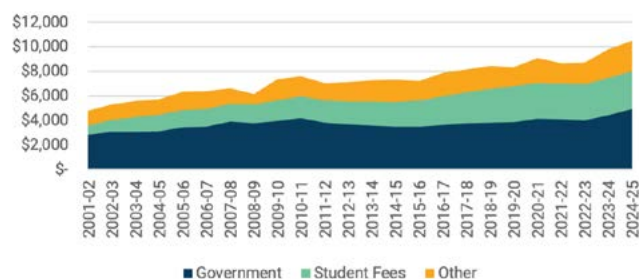
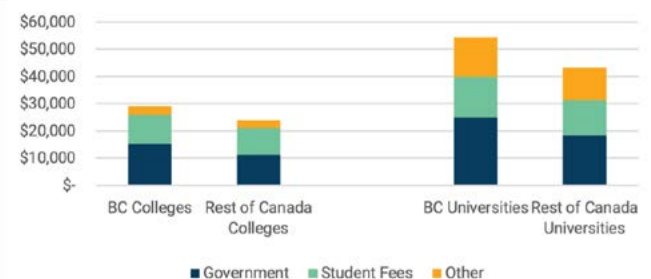


Figure BC6: Total Income Per FTE Student, by Source and Type of Institution, Canada vs. British Columbia, 2024-25



TUITION AND STUDENT AID

Undergraduate tuition fees in British Columbia are below the national average. Overall, student aid – in particular loans – was declining as a percentage of gross domestic product until

the COVID bump of 2020, which was followed by a downward trend and then a quick reversal in 2023-24.

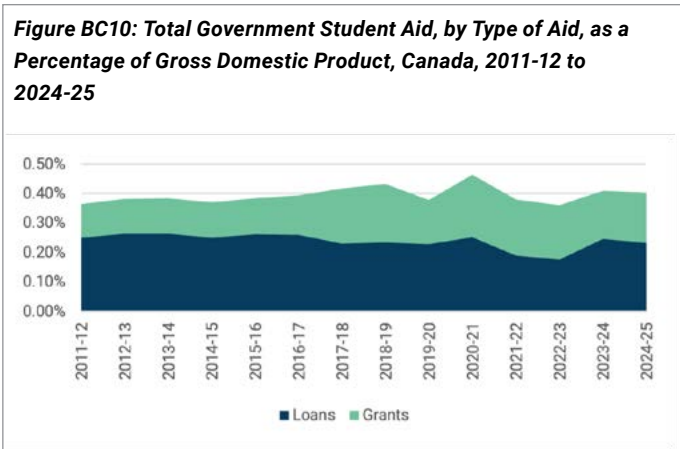
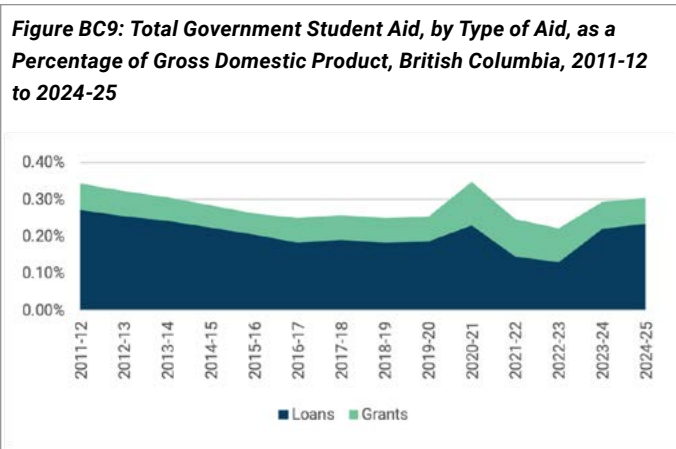
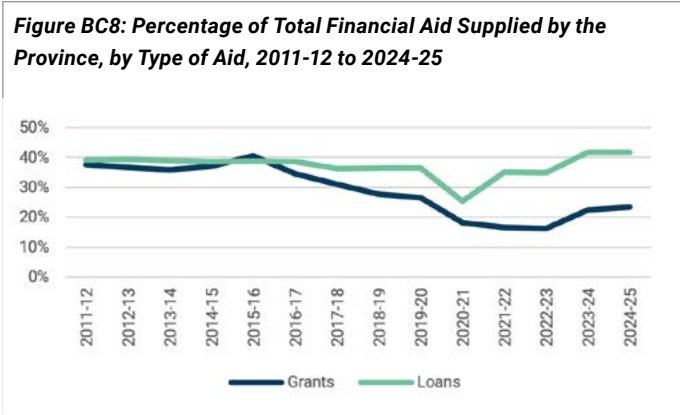
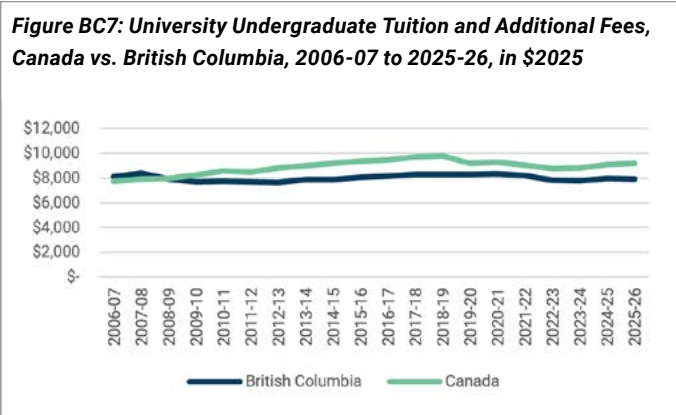


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