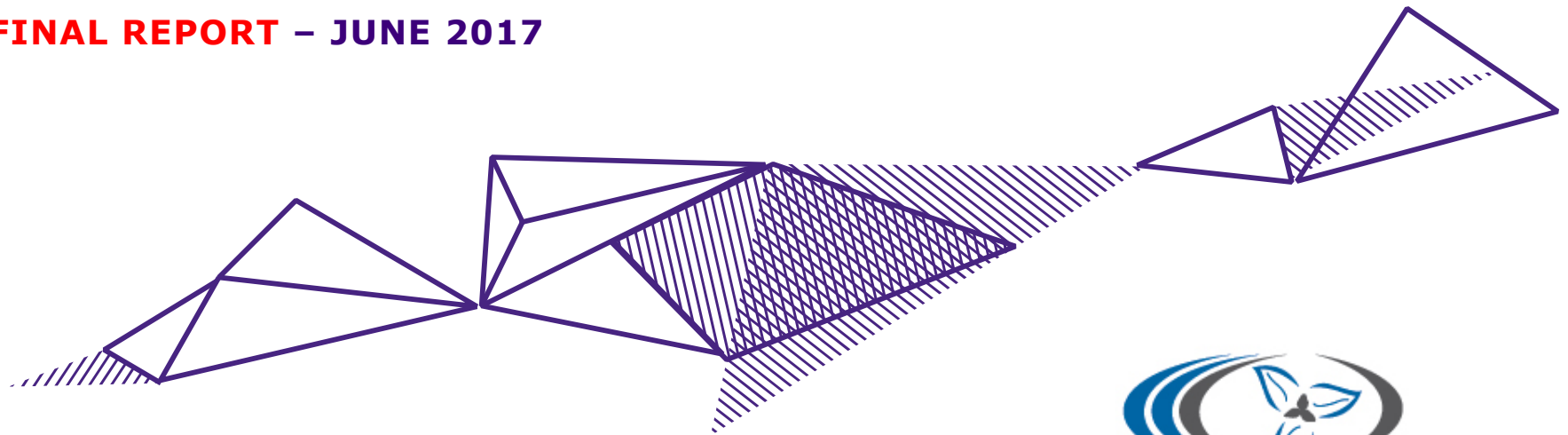


Student Demographic Study

PREPARED FOR: CAREER COLLEGES ONTARIO

FINAL REPORT – JUNE 2017



Career Colleges Ontario

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EXECUTIVE SUMMARY

Private Career College (PCC) Student Segmentation

Advanced analytics show that there are five unique segments within Ontario's PCC student population. (It should be noted, however, that one in five PCC students, or 21%, do not fall within a specific segment).

- 1. Focused Upgraders (35%)** tend to be older recent immigrants who have high levels of previous education. They are seeking to upgrade their skills at a PCC in order to find a job in the Canadian workforce.
- 2. Fast Trackers (21%)** are seeking to upgrade their skills as quickly as possible, and tend to be somewhat impatient about aspects of their learning experience.
- 3. New Opportunity Seekers (8%)** skew Canadian-born and female, and are likely to have attended another post-secondary institution without completing a credential. For them, a PCC represents a fresh start towards a new career path.
- 4. Frugal and Practical (9%)** students are budget-conscious and motivated to attend a PCC because it is perceived to offer relatively affordable tuition. Students in this cohort are less likely to have other sources of financial support, which likely explains their focus on affordability.
- 5. Homegrown and Resilient (6%)** students are more likely than other students to be facing significant barriers that make it challenging for them to upgrade their skills and improve their overall quality of life.

EXECUTIVE SUMMARY

Attitudes Towards PCCs

- PCC students are most likely to have selected their particular PCC because it offered a specific program of interest, featured small class sizes and offered the opportunity to participate in a work placement. The location of the PCC and the convenience it offers students in this regard is also a significant factor related to why students choose to attend a specific PCC.
- Approximately half of PCC students (52%) selected a specific program because they required education and training for a new and different career, with roughly one in five using this avenue to obtain their first career/job (20%) or choosing a program because of their general interest in it (19%). There are significant differences by age with these motivations, as younger students are more likely to seek out training to obtain a first career or because the program interests them, whereas older students are much more likely to choose a program so they can obtain a new/different job.
- Acquiring more knowledge and skills, as well as having the opportunity to pursue better career options, are also significant factors related to why students choose a PCC over other education and training options available to them. Older students are much more likely to identify “practical” factors when choosing a program, including how long it takes to complete the program, whether it will allow them to potentially earn a higher income and the extent to which it may improve their overall quality of life.

Satisfaction Metrics

- More than seven in ten students (72%) are satisfied with their program, with one quarter offering a middle-of-the-road evaluation, and only a very small proportion (2%) dissatisfied with their program. Satisfaction is relatively high across all program types, with those in Health programs (77%) and programs that take less time to complete offering the highest average satisfaction scores.
- The majority of students are also highly likely to recommend their PCC (58%, with PCCs province-wide achieving a Net Promoter Score of +42). Again, those in Health programs and those completing shorter programs (as well as older students) are among those most likely to say they would recommend their programs to others.

EXECUTIVE SUMMARY CONTINUED

Previous Education and Training

- Overall, significant numbers of PCC students have attended other types of post-secondary institutions in the past, including in Canada and in other countries. Indeed, a significant proportion of PCC students who were born in Canada have attended another university, community college or PCC in this country (56%), with an even higher proportion of first-generation immigrants (66%) having attended a post-secondary institution in another country.
- Majorities of those who have previously attended a post-secondary institution ended up completing a credential (degree, diploma, certificate...) at these universities or colleges. This is more likely to be the case among students who are first-generation immigrants, as well as students enrolled at PCCs in the Greater Toronto area. Those who are completing Technology and Business programs at PCCs are also more likely to have completed a degree or diploma prior to enrolling.
 - However, nearly one in five students who previously attended university (18%) and nearly three in ten who previously attended community college (29%) did not complete their respective programs.
- Although the vast majority of PCC students completed high school prior to entering their program, only a very small proportion (9%) transitioned into a PCC directly from high school. Higher proportions of younger students (as well as international students) move directly from secondary school to a PCC.

Government Assistance and Financial Issues

- Seven in ten PCC students receive some form of government support, with the vast majority of these receiving funding through OSAP (80%) and a small but significant proportion (16%) accessing Second Career funding. Receipt of these types of assistance is higher among older, non-immigrant and lower-income students.
- Only two in five students (38%) report that their families supported them financially prior to entering their program of study, with the majority of students indicating they reside in lower and lower-middle income households earning less than \$60,000/year. About one-quarter of students (26%) report that they were receiving some form of social or employment assistance prior to enrolling in their program.
- The majority of PCC students (62%) indicate they were employed prior to enrolling in a PCC, with most of these (65%) earning less than \$30,000/year at these occupations. Two in five students (39%) continue to be employed while enrolled in a PCC. Younger students are more likely to be working before and during their programs.

EXECUTIVE SUMMARY CONTINUED

Demographic Information

- Ontario's PCC student population skews heavily female (69% are women compared to just 31% male). The Ontario PCC student body is also relatively mature, with more than half (57%) reporting that they are over the age of 30.
- Approximately one third of PCC students live with their spouse or partner, with only one in five living with their parents (18%). Four in ten PCC students (41%) have children, with 12 percent of the PCC student population indicating they are single parents. Older students, as well as first-generation immigrants, are more likely to have children in their households.
- One half of PCC students are first-generation immigrants (52%), with an additional 14 percent reporting that their parents were born outside Canada. Significantly higher concentrations of new Canadians are enrolled in PCCs in the Greater Toronto Area (GTA) (74% in the City of Toronto and 60% in the outlying 905 Region, compared to 22-26% in the rest of southern Ontario and only 7% in the North). Students who are first-generation immigrants also tend to be significantly older than PCC students born in Canada.
- Three in ten PCC students are visible minorities (30%), and four percent self-report as indigenous, with the incidence of visible minority students highest in the GTA and the incidence of indigenous students higher in the North.
- PCCs are very ethnically diverse, with two in five students identifying as being of East Asian descent (19%) and one in ten self-identifying as being of South Asian (9%) or Black/African-Canadian descent (9%). Just three in ten (32%) identify themselves as being of European descent.
- Nearly four in ten PCC students (38%) report that their first language is neither English nor French. The incidence of speaking these languages is significantly higher in the Greater Toronto Area, as well as among older students and those who are first- or second-generation immigrants.
- One in ten PCC students report they have a disability (12%), with higher proportions of younger students and students in rural and northern Ontario self-reporting that they have a disability. Students with a disability are most likely to report that they have a mental illness (34%) or intellectual/learning disability (24%).

EXECUTIVE SUMMARY COMPARISONS WITH COLLEGES

Comparisons Between Ontario PCC Students and Community College Students

- Compared to their counterparts attending PCCs, a high proportion of community college students (33%) enter these institutions directly from high school. Fewer than one in ten Ontario PCC students (9%), on the other hand, transition directly from high school into PCCs.
- A comparison of PCC student data with students attending Ontario community colleges shows that a much higher proportion of PCC students are female (69% at PCCs vs. 51% at Ontario community colleges).
- The PCC student body in Ontario tends to be significantly older than those who attend community colleges, as more than half of PCC students indicate they are over the age of 30 (57% vs. 10% among community college students). Conversely, only about one quarter of PCC students are under 25 (26%) whereas nearly four in five community college students are aged 18 to 25 (79%, including 40% who are aged 18-20).
- Nearly nine in ten community college applicants who are not international students (87%) were born in Canada, with only 13 percent of non-international student applicants indicating they were born in another country. Since more than one half (52%) of PCC students are first-generation immigrants, this suggests that Ontario PCCs have a much higher concentration of immigrant learners than community colleges in the province.
- The proportions of visible minority and indigenous students at PCCs are comparable to those found at community colleges. Three in ten PCC students self-identify as a visible minority (30% vs. 28% respectively) and only a very small number self-identify as indigenous (4% vs. 7% respectively).
- Nearly four in ten PCC students report that their first language is neither English nor French, which is a significantly higher proportion of non-official language speakers compared to the Ontario community college student population (38% vs. 23% respectively).
- The proportion of PCC students who report having a disability is in line with the proportion of those attending community colleges who say they have a disability (12% vs. 16% respectively).

METHODOLOGY

This report presents the results of an online survey conducted with students currently attending PCCs in Ontario. The survey was programmed by Environics Research and made available to students on the website careercollegesurvey.environics.ca.

Career Colleges Ontario held a series of regional meetings with PCC representatives in January and February 2017 to inform them about the purpose of the survey. PCCs were responsible for informing their students about it and encouraging them to complete the survey. Environics prepared a letter for PCCs to send to their students and monitored the number of completions daily to ensure that the survey was representative of the Ontario PCC student population. Both CCO and Environics made follow up inquiries to PCCs encouraging them to get their students to complete the survey.

Responses were received from students at 163 of the 586 PCCs located throughout the province. A total of 5,867 responses were received for the survey between January 19th and February 24th, 2017. During the data cleaning process, a total of 144 surveys were removed from the data set due to concerns about the validity of the responses (e.g. completing the survey too quickly) or because it was apparent that those completing the survey were not PCC students. This leaves a total sample size of **n=5,723** students that are assessed in this report. Because this is a sample of convenience, no margin of error can be ascribed. As there were an estimated 43,000 students enrolled in private career colleges in Ontario in early 2017, the response rate for this survey is approximately 13 percent.

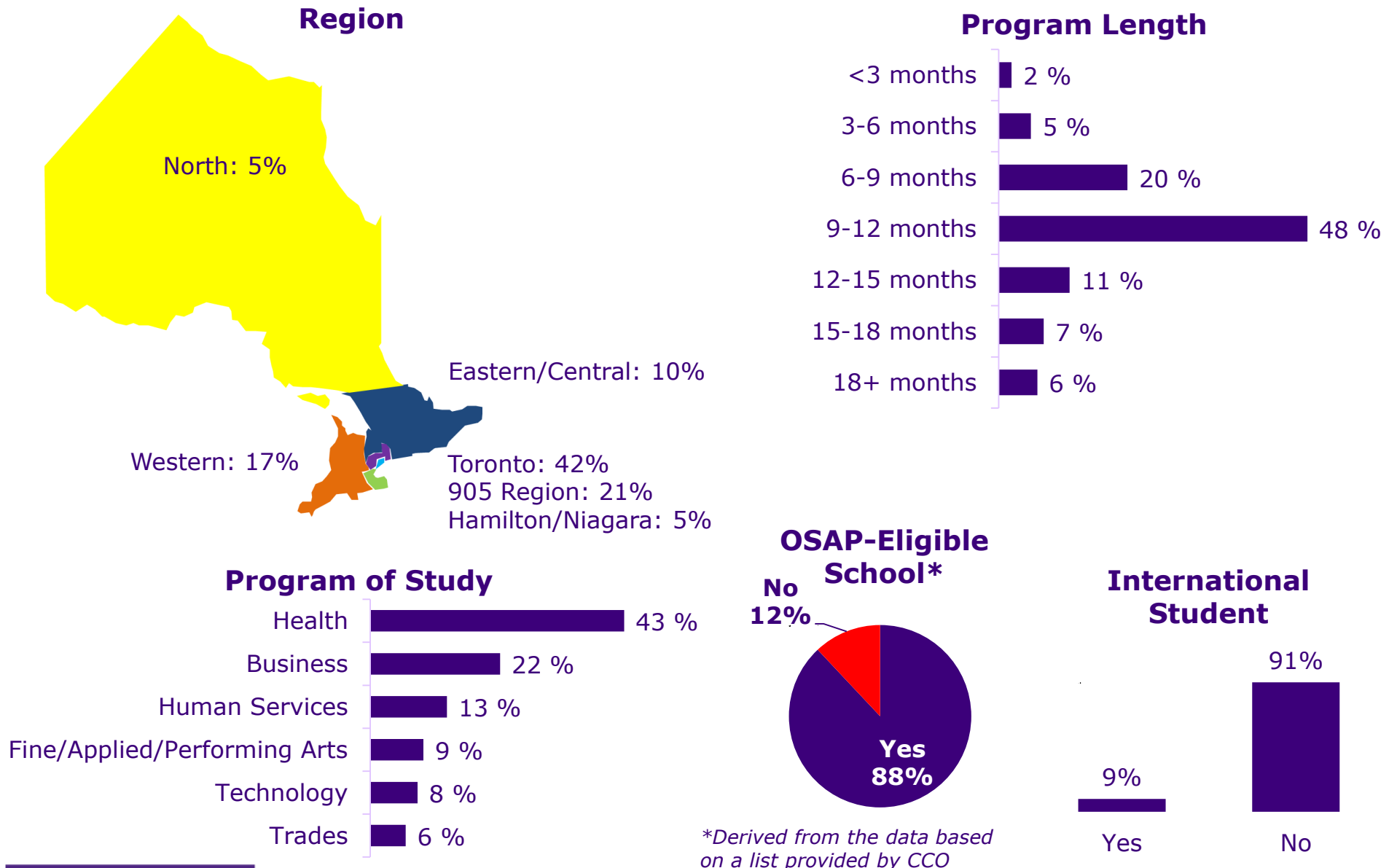
Data included in this report comparing the results of the PCC student survey to the characteristics of students attending Ontario community colleges are taken from *Colleges Ontario's 2016 Environmental Scan*¹, which reports student data obtained from these colleges as well as from the Ontario Ministry of Advanced Education and Skills Development (MAESD).

In this report, results are expressed as percentages unless otherwise noted. Results may not add to 100% due to rounding or multiple responses.

Available at: http://www.collegesontario.org/research/2016_Environmental_Scan/CO_EnvScan_2016_PROFILES_WEB.pdf

Profile of Respondents

SAMPLE PROFILE – PROGRAM CHARACTERISTICS



PCC Student Segmentation

SURVEY SEGMENTATION

Segmentation of survey responses revealed five different types of PCC students.

- Environics' advanced analytics team applied a variety of statistical models to the survey data to uncover five unique segments within the PCC student population in Ontario:



Focused Upgraders	Fast Trackers	New Opportunity Seekers	Frugal and Practical	Homegrown and Resilient	(Not classified)
35%	21%	8%	9%	6%	21%

- It should be noted that one in five PCC students who completed the survey (21%) could not be classified within one of these five segments. These students were not classified because their characteristics did not fit neatly within the segmentation solution due to patterns in their responses (e.g. too many responses to certain questions were the same). Because segmentation involves creating relatively similar clusters of respondents from heterogeneous responses, this lack of classification can occur when the responses are overly homogeneous.
- The key demographics, attitudes and behaviours of these five segments are reviewed on the next slides.

SEGMENT 1: FOCUSED UPGRADERS

The largest segment, Focused Upgraders are seeking a program that will build upon their previous education and training so they can join the Canadian workforce.



Comprised of a large number of recent immigrants, Focused Upgraders tend to treat Ontario's PCCs as a "bridge" into the Canadian workforce. A significant proportion of Focused Upgraders have attended university or college in the past, with a large share holding a graduate or undergraduate degree. For them, PCCs are a means of obtaining a Canadian credential and, in turn, finding employment in a related field.

Among the five segments, Focused Upgraders are most likely to select a specific PCC because it offers a program that directly appeals to them, or because someone else they know recommended it to them. Members of this segment are highly motivated to take the skills and training they access at a PCC to obtain a specific job. They are also less likely than other segments to be concerned about secondary features of their programs, such as class sizes, the flexibility it offers students in terms of scheduling, or the length of time it takes to complete the program. They are slightly more interested in accessing programs online, and less concerned about the affordability of their program.

Focused Upgraders are also very likely to provide high satisfaction scores for their PCCs, as well as to recommend it to others.

Members of this segment tend to skew older and female, with a high concentration living in the Greater Toronto Area.

Demographic Overview



of PCC students



65% female
32% male



54% 1st gen. immigrant
14% 2nd gen. immigrant
27% non-immigrant

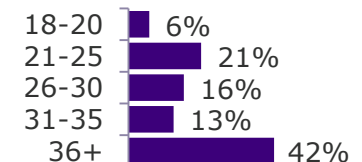


66% in GTA:

- Toronto (46%)
- 905 Region (21%)



37% previously attended university; 69% completed a degree



SEGMENT 2: FAST TRACKERS

Fast Trackers are motivated to get trained and into the workforce as quickly as possible.

Fast Trackers resemble Focused Upgraders in many respects. However, unlike their counterparts, they tend to be less satisfied with their PCC program, and particularly keen to acquire the skills they need as quickly as possible so they can get to work.

Fast Trackers are most likely to choose a program because it can be completed quickly, as well as offer flexibility in terms of class hours and timetables so that it fits with their lifestyles. Students in this cohort are also slightly more likely to be motivated by the prospect of earning a higher income, especially since they tend to earn lower incomes at their current jobs. Unlike Focused Upgraders, they are typically not concerned about whether others recommended the program, but are motivated by whether the program is affordable, as well as the ability to develop practical skills via a work placement.

Students in the Fast Trackers segment are also less likely to express satisfaction with their PCC program, with only six in ten providing scores of 8-10 on a 0-10 scale. They are also less likely to recommend their program to others.

Skewing female and somewhat GTA-centric, Fast Trackers are most likely to be found in Health programs. Students in this cohort are more likely to have children (with a higher concentration of single parents in this group), with fewer of these students working prior to enrollment, or while they are attending a PCC.



Demographic Overview

21% of PCC students



71% female
26% male



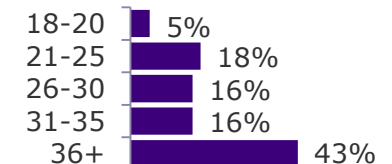
52% 1st gen. immigrant
14% 2nd gen. immigrant
30% non-immigrant



61% in GTA:
• Toronto (39%)
• 905 Region (22%)



34% previously attended university and 30% previously attended a community college



SEGMENT 3: NEW OPPORTUNITY SEEKERS

After a potential false start, New Opportunity Seekers are looking for flexible training options to set out on a new career path.

New Opportunity Seekers are motivated to choose a PCC for a variety of reasons, including their overall interest in the program itself and “convenience” reasons such as the length of the program, where it is located, the size of classes and the availability of a work placement. Like Fast Trackers, they are keen to finish their programs quickly.

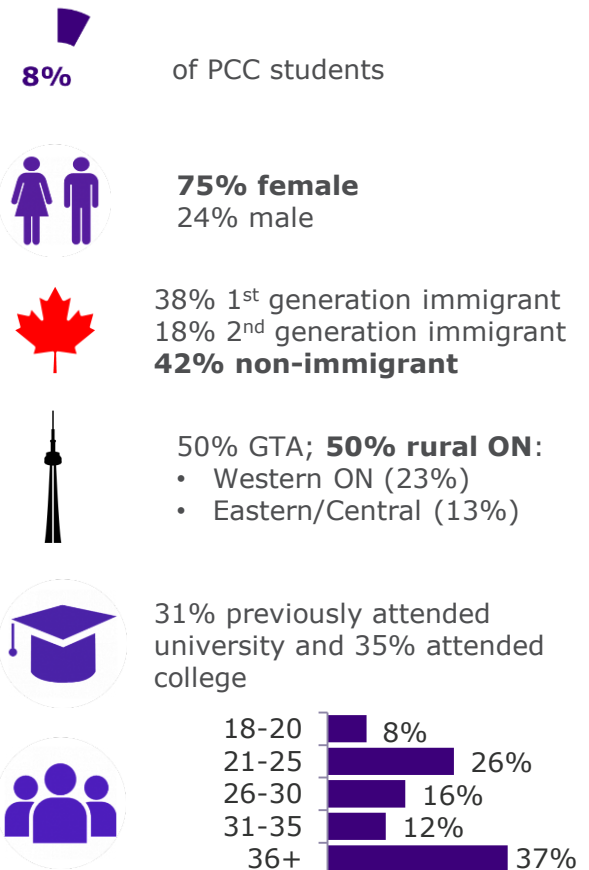
This is a relatively young cohort and its members are more likely to be Canadian-born and found in rural and northern Ontario – although half (50%) live in the Greater Toronto Area. Skewing female, many members of this group previously attended a university or college. However, unlike other segments, a significant proportion of New Opportunity Seekers did not complete a degree or diploma at another post-secondary institution. PCCs, therefore, represent a fresh opportunity to follow a new career path, as a higher proportion of these students indicate they are training for a new job rather than seeking to upgrade their skills for their current position.

New Opportunity Seekers tend to give high marks to their PCC and are likely to recommend it to others, with a higher share within Health programs than in other areas of study.

Significant numbers of New Opportunity Seekers report that they worked prior to enrolling in a PCC, with a higher-than-average number continuing to work while still in school. Members of this group are also more likely to live at home and, perhaps due to their relatively young age, less likely to have children.



Demographic Overview



SEGMENT 4: FRUGAL & PRACTICAL

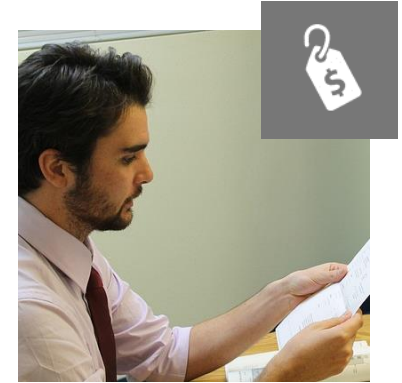
Less likely to have other means of support, Frugal & Practical students are most likely to base decisions about program choices on financial factors.

Frugal and Practical students are motivated to upgrade their skills and education; however, they tend to be very conscious of the cost associated with doing so. Although other factors, including flexible hours and program reputation, play a role in helping them select a specific program, what stands out about members of this segment is that they are more likely to choose a program based on whether tuition is affordable. They are also the segment most likely to have chosen a program because online courses were available.

This focus on the cost of tuition is perhaps understandable given that a much smaller proportion of these students receive student loans or other types of government funding. (However, given that this is a slightly older student segment, the proportion who receive funding through the Ontario government's Second Career program is slightly higher than among other segments.) Significant numbers of these students have also completed a university or college program.

Frugal and Practical students are also less likely to have been working prior to enrolling in their respective programs, with higher numbers living on their own or with other family members. There is a slightly higher concentration of Frugal and Practical students enrolled in Business programs at Ontario PCCs.

Frugal and Practical students typically offer average satisfaction and recommendation scores. Six in ten of these students live in the GTA and about half of these students are first-generation immigrants. A slightly higher proportion of Frugal and Practical students self-identify as a visible minority.



Demographic Overview



9%

of PCC students



62% female
33% male



49% 1st gen. immigrant
16% 2nd gen. immigrant
29% non-immigrant



63% in GTA:
• Toronto (42%)
• 905 Region (21%)



32% each previously attended university or college; most completed a credential



18-20	5%
21-25	19%
26-30	19%
31-35	18%
36+	38%

SEGMENT 5: HOMEGROWN & RESILIENT

Skewing male and Canadian-born, this smallest segment is less satisfied with their PCC experience as they face significant life challenges.

The smallest of the five segments, those in the Homegrown and Resilient category tend to offer much lower satisfaction scores for their PCC and are among the least likely to recommend it to others. Unlike other segments, members of this group, which skews male and Canadian-born, do not gravitate towards a specific factor that explains why they chose to enrol in their specific PCC program. However, slightly higher proportions of Homegrown and Resilient students indicate they chose a PCC for furthering their education because it provided an opportunity to upgrade their skills in order to find a new job, or because it offered a program of interest.

Members of this segment stand out because a disproportionately high number of them face significant challenges in their lives. Compared to other segments, a slightly higher proportion did not complete high school prior to entering a PCC. In addition, a relatively high number of Homegrown and Resilient students indicate they do not receive any financial assistance from their families. More than one in three Homegrown and Resilient students accessed social or employment assistance at some point, and although most PCC students have relatively low incomes, more members of the Homegrown and Resilient cohort earn household incomes of less than \$30,000/year. This group also contains a larger share of students who report having a disability.

Homegrown and Resilient students are more likely to be found in rural and northern Ontario, and to be completing longer programs, particularly in Human Services; Fine, Applied and Performing Arts; and Technology and Trades.



Demographic Overview


6%

of PCC students



56% female
41% male



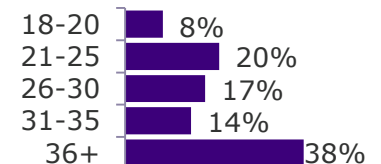
36% 1st gen. immigrant
21% 2nd gen. immigrant
39% non-immigrant



53% GTA, **47% rural ON:**
• Western (18%)
• Eastern/Central (12%)
• **Northern (10%)**



30% previously attended university and 35% previously completed college





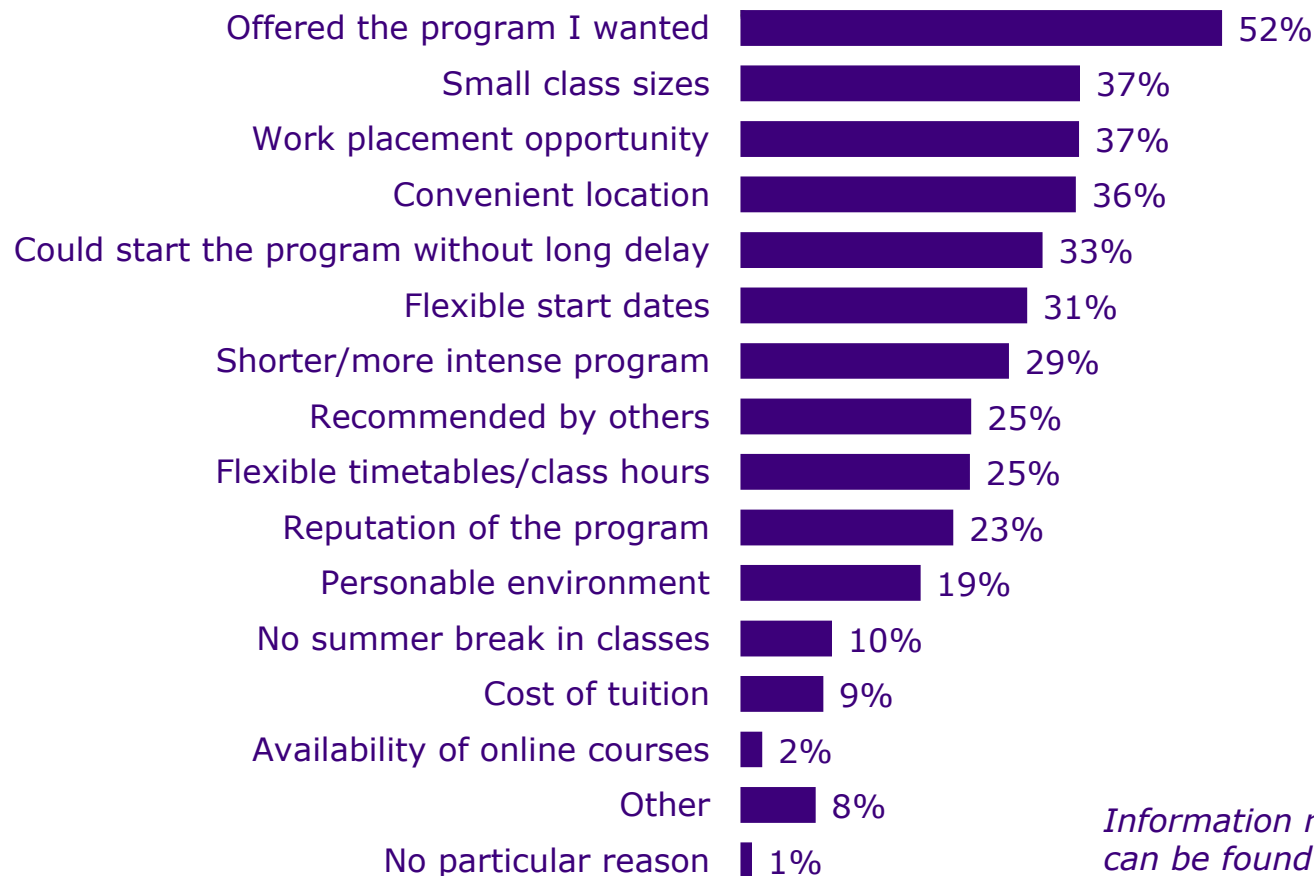
Attitudes Towards PCCs

REASON FOR ENROLLING IN A CAREER COLLEGE

More than half of students (52%) chose their PCC because it offered the specific program they sought.

Q1. Why did you choose to enroll at this career college?

(Multiple mentions accepted, totals will exceed 100%)



Information regarding specific sub-groups can be found on the next page.






REASON FOR ENROLLING

SUBGROUP HIGHLIGHTS

- The small class sizes at PCCs is mentioned frequently by a number of student sub-groups, including:
 - Younger students (51% of 18-20 year-olds and 45% of 21-25 year-olds compared to 37% of 26-30 year-olds, and 32% of 31+ year-olds).
 - Students in Eastern/Central and Western Ontario (45% and 44% versus 32% of Toronto students).
 - Fine, Applied and Performing Arts students (47%) and Technology students (42%).
 - Non-immigrant students (46% vs. 31% among first-generation immigrants).
 - Students with a disability (46% vs. 36% among those who did not report a disability).
- The PCC “offering the program I wanted” is mentioned most frequently by Fine, Applied and Performing Arts students (66%) and Technology students (60%). It is also mentioned most by students living on their own without children (60%).
- The availability of a work placement opportunity is mentioned most often by students enrolled in Technology (42%) and Health (40%) programs. It is also mentioned most by students in Eastern/Central and Western Ontario (41% and 39%, compared to 30% among Northern students).
- Having a convenient location is mentioned most by older students (41% aged 36+ and 37% aged 31-35, compared to 31-32% aged 18-30), as well as by Eastern/Central Ontario students (40%).
- Flexible timetables/class hours is mentioned most often by those with a current full-time job (38%, compared to 26% with a part-time/casual job and 22% unemployed). Women (27% vs. 20% among men) and those living on their own with children (32%) are also more likely than men to mention this.
- The reputation of the program is mentioned most frequently by Fine, Applied and Performing Arts students (37% vs. 19% among those in Human Services programs).
- The cost of tuition is mentioned most often by those with a current full-time job (17%) and those attending a school that is not eligible for OSAP (24%, vs. 7% of OSAP-eligible schools).

REASON FOR ENROLLING SEGMENT COMPARISON

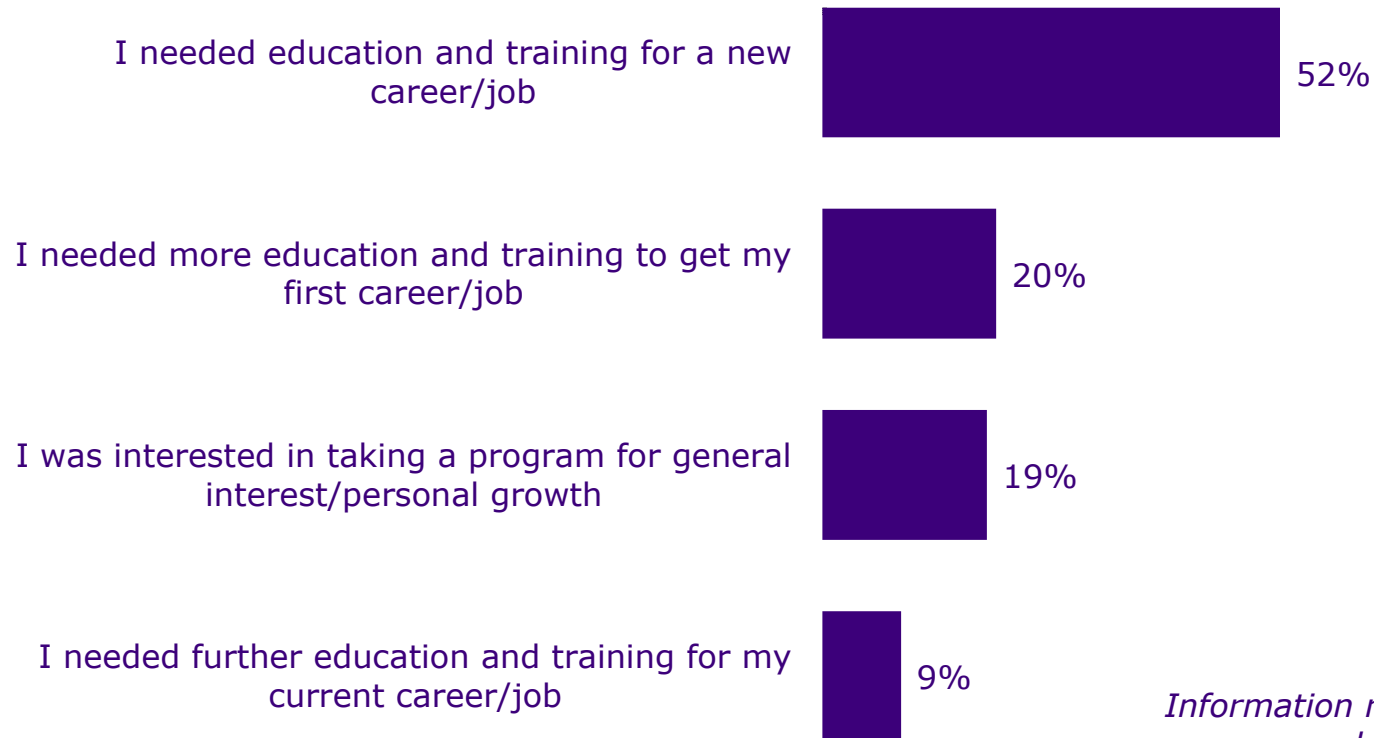
Four of the five segments show significant variation in why they chose to enroll in a PCC; Homegrown and Resilient students do not.

	 Focused Upgraders (n=2,001)	 Fast Trackers (n=1,213)	 New Opportunity Seekers (n=471)	 Frugal & Practical (n=506)	 Homegrown & Resilient (n=331)
Career college offered the program that I wanted to take	82%	3%	91%	20%	33%
Work placement opportunity	26%	32%	69%	41%	24%
Small class sizes	25%	25%	86%	55%	21%
Convenient location	31%	27%	62%	44%	20%
Could start the program without a long delay	28%	24%	61%	41%	18%
Flexible start dates	26%	21%	47%	52%	15%
Shorter program due to increased hours per week	18%	27%	77%	30%	18%
Flexible timetables/class hours	17%	20%	37%	38%	9%
Career college was recommended by a friend or family member	41%	5%	15%	7%	11%
Reputation of the program	24%	13%	20%	27%	11%
Personable environment	12%	5%	32%	46%	13%
No summer break in classes	9%	2%	4%	26%	5%
Cost of tuition	2%	2%	1%	43%	1%
Availability of online courses	2%	0%	-	5%	1%

REASON FOR CHOOSING SPECIFIC PROGRAM

One half of PCC students (52%) are seeking education and training for a new job, while one in five chose their program to obtain their first career (20%), or for personal growth (19%).

Q5. Why did you decide to enroll in this specific program of study?*



Information regarding specific sub-groups can be found on the next page.

**As this is a single-response question, it is possible that more than one of these factors may have influenced students to enroll in a specific PCC program. However, this question does not measure this directly.*

REASON FOR CHOOSING SPECIFIC PROGRAM

SUBGROUP HIGHLIGHTS






ANALYSIS BY AGE GROUP (Q5)					
	18-20	21-25	26-30	31-35	36+
Needed education and training for a new (different) job	31%	38%	52%	57%	60%
Needed more education and training to get my first job	38%	30%	20%	17%	14%
Interested in taking a program for general interest/personal growth	27%	26%	20%	17%	15%
Needed further education and training for my current job	4%	6%	7%	10%	11%

- As the table above shows, younger students are more likely to select a program because they need training to obtain their first career, whereas older students are more likely to gravitate towards programs in order to find a job that is different than the one they currently hold. Younger students are also more likely to select a program based on it fitting with their personal interests, whereas older students are less likely to choose their program for this intrinsic reason.
- First-generation immigrants are more likely to indicate that they needed more education and training to find their first job (22% vs. 15% among students whose parents were born in Canada) or to further their education in their current job (10% vs. 6% respectively). Non-immigrants, on the other hand, are more likely to say they accessed PCC training to find a new job (60% vs. 48% respectively).
- "Needed more education for a new job" is most likely to be selected by New Opportunity Seekers (60%). It is also selected more often by those receiving social or employment assistance via EI, WSIB, or other programs (66%, compared to 47% receiving OW or ODSP, and 51% not receiving these forms of support). Students attending OSAP-eligible schools select this option more often than non-eligible schools (53% vs. 46%). As well, Students in Fine, Applied and Performing Arts programs are more likely to say they chose their PCC because they "needed more education for their first job" (29%).
- "Needed more education for my current job" is selected most by those with the shortest programs (16% of programs <6 months in duration). It is also selected most by those with full-time jobs (15%, compared to 10% with part-time/casual jobs and 7% unemployed). Students attending schools not eligible for OSAP are more likely to select this than those from schools that are eligible (15% vs. 8%).

REASON FOR SELECTING PROGRAM

SEGMENT COMPARISON

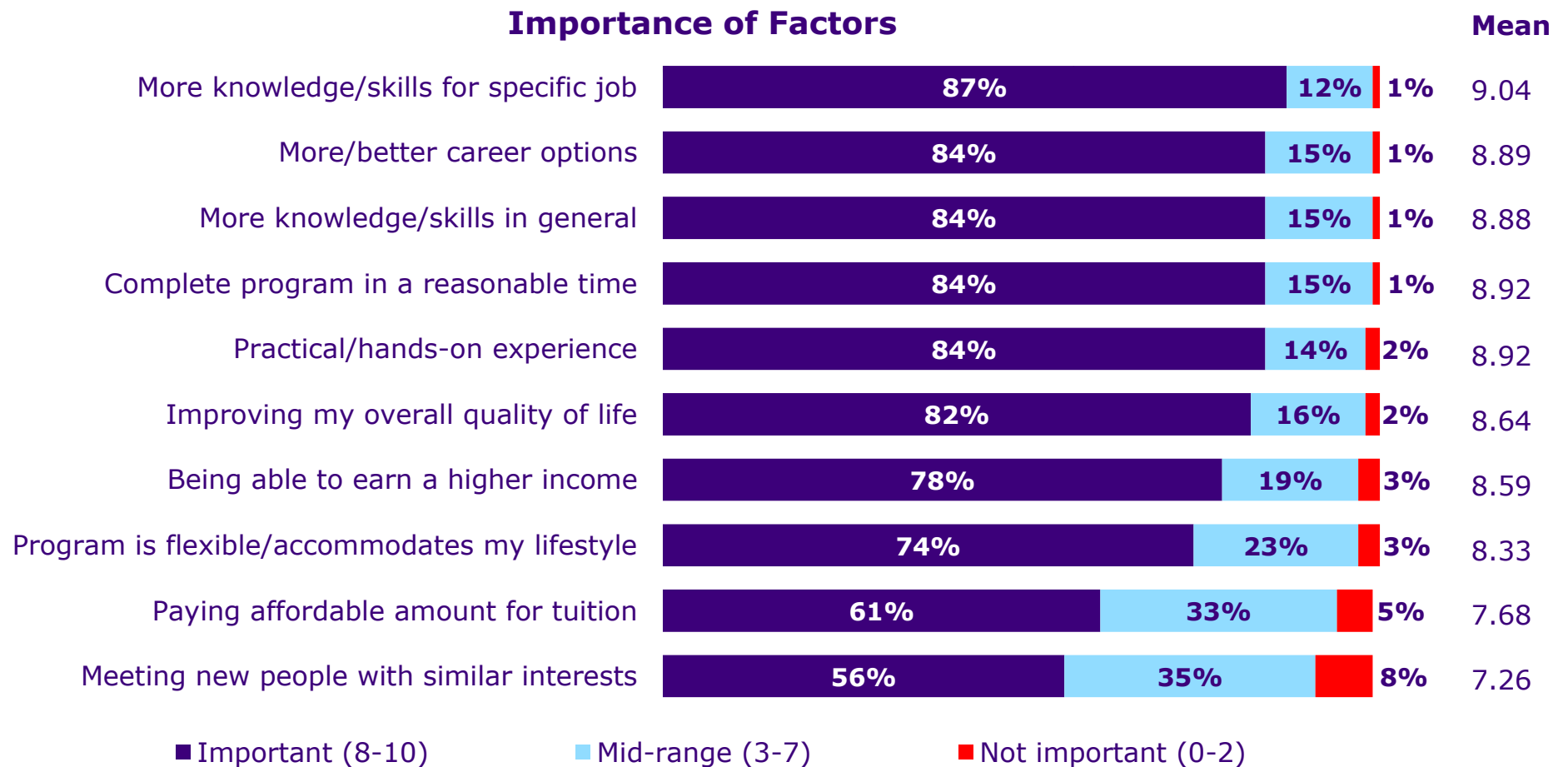
New Opportunity Seekers are more likely to choose a program because it provides education/training for a new job

	 Focused Upgraders (n=2,001)	 Fast Trackers (n=1,213)	 New Opportunity Seekers (n=471)	 Frugal & Practical (n=506)	 Homegrown & Resilient (n=331)
Needed education and training for a new (different) job	54%	51%	60%	53%	56%
Needed more education and training to get my first job	20%	19%	20%	19%	14%
Interested in taking a program for general interest/personal growth	18%	21%	13%	19%	22%
Needed further education and training for my current job	8%	9%	7%	10%	8%

IMPORTANCE OF FACTORS IN ENROLMENT

Developing knowledge/skills and improving career prospects are the main reasons why students chose to attend a PCC.

Q2. How important were each of the following factors in leading you to attending a Professional Career College in Ontario? Please rate the following on a scale of 0 to 10, where 0 is not at all important and 10 is extremely important.



IMPORTANCE OF FACTORS IN ENROLMENT

SUBGROUP HIGHLIGHTS

ANALYSIS BY AGE GROUP (Q2) – “MOST IMPORTANT” (8-10 ON 0-10 SCALE)






	18-20	21-25	26-30	31-35	36+
Can complete program in reasonable time	78%	81%	85%	85%	86%
Improving my overall quality of life	73%	79%	83%	84%	85%
Being able to earn a higher income	69%	70%	73%	77%	77%
Flexible program/accommodates my lifestyle	60%	70%	73%	77%	77%
Paying an affordable amount for tuition	57%	60%	59%	65%	63%

- As the table above shows, older students are slightly more likely to be motivated by both financial and quality of life factors when they choose a PCC. They are more likely than their younger counterparts to select a PCC based on how quickly they can complete their program, as well as upon to what extent it can improve their quality of life and improve their earning prospects while at the same time being able to accommodate it within their lifestyle and afford the tuition.
- Being able to earn a higher income is also important to other student groups, including women (81% versus 73% among men) and students with the lowest household incomes (81% under \$30K).
- Program flexibility is particularly important to first-generation immigrants (77% vs. 69% among non-immigrant students); students with a full-time job (82%, compared to 75% employed part-time/casual and 73% unemployed); students with the lowest household incomes (78% under \$30K); women (79% vs. 64% among men); and students with children (81% single parents with children; 80% living with a partner or family with children).
- Affordable tuition is rated important most often by students with the lowest household incomes (65% under \$30K); first-generation immigrants (65% vs. 57% among non-immigrants) and students whose school is not eligible for OSAP (67%, compared to 61% of OSAP-eligible schools).
- Being able to complete the program in a reasonable time is rated important most often by Health (88%) and Business (86%) students. Meanwhile, practical/hands-on experience is most likely to be rated as important by Fine, Applied and Performing Arts students (92%) and Health students (89%).

IMPORTANCE OF FACTORS IN ENROLMENT

SEGMENT COMPARISON

% Important (8-10 on 0-10 scale)*

	 Focused Upgraders (n=2,001)	 Fast Trackers (n=1,213)	 New Opportunity Seekers (n=471)	 Frugal & Practical (n=506)	 Homegrown & Resilient (n=331)
Having more knowledge and skills for a specific job	87%	82%	92%	84%	79%
Being able to get practical/hands-on experience	83%	80%	90%	86%	74%
Being able to complete the program in a reasonable amount of time	82%	81%	92%	82%	69%
Having more knowledge and skills in general	83%	80%	86%	83%	76%
Having more/better career options	83%	79%	86%	82%	72%
Improving my overall quality of life	82%	78%	82%	83%	71%
Being able to earn a higher income	76%	75%	78%	75%	61%
Being able to take a program that is flexible/accommodates my lifestyle	69%	70%	76%	73%	58%
Paying an affordable amount for tuition	54%	52%	51%	66%	45%
Being able to meet new people interested in the same things I am	51%	45%	48%	45%	37%

*Segmentation results are based on top 2 responses (9, 10 on 0-10 scale) rather than top 3 responses (8-10) to create greater differentiation between segments.



Satisfaction Metrics

SATISFACTION WITH THE PROGRAM

Nearly three quarters of PCC students (72%) are satisfied with their respective programs.

Q6.Thinking about everything that your program has to offer, what is your overall level of satisfaction with your experience?



Satisfaction by Program Type (% 8-10 on 0-10 scale)	
Health	75%
Human Services	73%
Business	72%
Trades	72%
Technology	68%
Fine, Applied and Performing Arts	66%

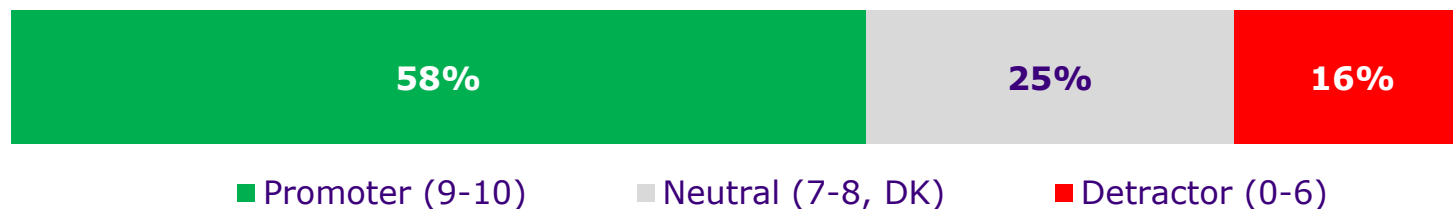
- As the table on the left shows, satisfaction is consistent across programs, with those in Health slightly most likely to be satisfied with their program (75%).
- Satisfaction is highest among students with the shortest program lengths (76% with program duration of <6 months), and lessens as length of the program increases (63% with a program 18+ months long).
- Western Ontario students show the highest levels of satisfaction (75%), followed by 905 region (74%) and Toronto students (73%).
- Satisfaction is also highest among the oldest age group (75% aged 36+).

LIKELIHOOD OF RECOMMENDING PROGRAM

Three in five PCC students (58%) are highly likely to recommend their college to others.

Q7. How likely would you be to recommend your program to others?

Net Promoter Score*: +42



- Students from Health programs (62%) and Human Services (61%) are most likely of all programs to be promoters.
- Promoters are more likely to come from shorter programs (66% of programs <6 months, compared to 50% of 18+ months).
- Older students are more likely to be promoters than younger students (62% aged 36+ vs. 53% aged 18-20).
- Women are slightly more likely to be promoters than men (60% vs. 55%).
- Students in the lowest income group are more likely to be promoters (62% under \$30K).
- Those who have previously attended a PCC (60%) or have no post-secondary education (60%) are likely to be promoters (compared to 54% who have attended university or 57% who attended community college).






**Net Promoter Score (NPS) is an index that is calculated by taking those who are highly likely to recommend the program ("Promoters," 9-10 on a 0-10-point scale) and subtracting those who are unlikely to recommend the program ("Detractors," 0-6 on 0-10 scale). "Neutrals" (7-8 and those who did not respond) are not included in the NPS calculation.*

SATISFACTION METRICS BY SEGMENT

Three of the five segments (Fast Trackers, New Opportunity Seekers and Frugal & Practical) provide high satisfaction and Net Promoter Scores.

Q6. Thinking about everything that your program has to offer, what is your overall level of satisfaction with your experience?

Q7. How likely would you be to recommend your program to others?

	 Focused Upgraders (n=2,001)	 Fast Trackers (n=1,213)	 New Opportunity Seekers (n=471)	 Frugal & Practical (n=506)	 Homegrown & Resilient (n=331)
% very satisfied (8-10)	72%	64%	79%	75%	55%
% "Promoters" (9-10 on 0-10 scale)	58%	48%	59%	58%	40%
% "Neutrals" (7-9 on 0-10 scale, DK)	27%	28%	31%	29%	29%
% "Detractors" (0-6 on 0-10 scale)	14%	24%	11%	13%	31%
Net Promoter Score	+44	+24	+40	+45	+9

Previous Education

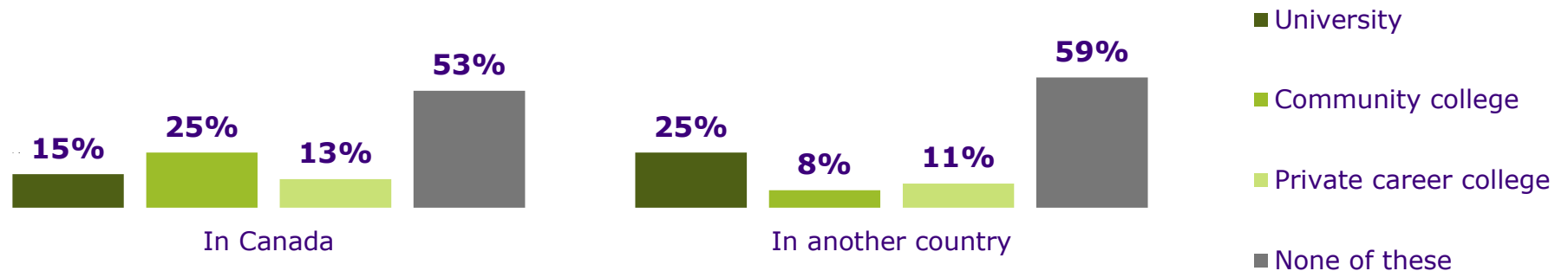
PREVIOUS PSE ATTENDANCE

Significant proportions of PCC students have previously attended universities or colleges – both within and outside Canada.

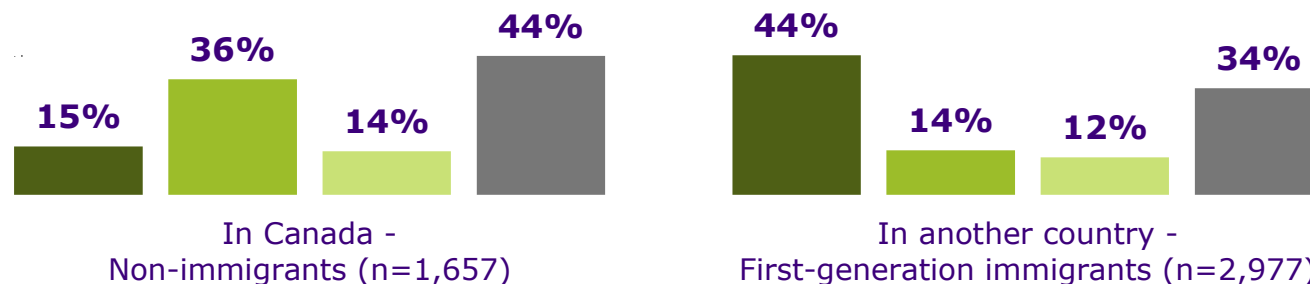
Q11. Please indicate if you have previously attended any of the following types of post-secondary institutions [in Canada/in a country other than Canada]

(Multiple mentions accepted, totals will exceed 100%)

Previous PSE Attendance – All Students



Previous PSE Attendance – First-Generation vs. Non-Immigrants



PREVIOUS PSE ATTENDANCE

SUBGROUP HIGHLIGHTS

University Attendance

- Students in Fine, Applied and Performing Arts are most likely to have attended university in Canada (24%). Students in Technology programs are also likely to have attended in Canada (22%) or elsewhere (33%), followed by those in Business programs (Canada - 18% or elsewhere - 34%).
- Those in a shorter program are more likely to have attended university outside of Canada (29% of those in programs <6 months and 27% of those in programs 6-12 months in duration).
- Those who are looking to upgrade their existing job are most likely to have attended outside of Canada (35%).
- Students who are dissatisfied with their program are most likely to have attended a Canadian university (25%).
- Students with higher household incomes are most likely to have previously attended any university.

Community College Attendance

- Attendance of a community college in Canada is highest among Business (28%) and Health (26%) students.
- Attendance in Canada is also highest among those looking for a new career/job (29%).
- Students with higher household incomes are more likely to have previously attended any college.
- Students attending an OSAP-eligible school are most likely to have attended a Canadian college (26%).
- Students with a disability are more likely to have attended college in Canada than those without (38% vs. 23%).

PCC Attendance






- Attendance of PCC in Canada is highest among Business, Health and Human Services students (14% each).
- Students with lower household incomes are more likely to have previously attended any PCC.
- Students with a disability are more likely to have attended a PCC in Canada than those without (17% vs. 12%).
- Students living on their own with children are most likely to have attended a Canadian PCC (20%).

PREVIOUS PSE ATTENDANCE

SEGMENT COMPARISON

Higher proportions of New Opportunity Seekers and Homegrown & Resilient students previously attended community colleges

% of Students That Previously Attended Other PSE Institutions (Q11a)

	 Focused Upgraders (n=2,001)	 Fast Trackers (n=1,213)	 New Opportunity Seekers (n=471)	 Frugal & Practical (n=506)	 Homegrown & Resilient (n=331)
In Canada					
University	15%	15%	18%	13%	17%
Community College	22%	25%	31%	27%	32%
Private Career College (PCC)	13%	13%	12%	13%	13%
(None of these)	55%	52%	46%	51%	50%
Outside Canada					
University	28%	25%	17%	24%	16%
Community College	10%	11%	9%	12%	8%
Private Career College (PCC)	8%	8%	5%	8%	3%
(None of these)	56%	58%	72%	58%	74%

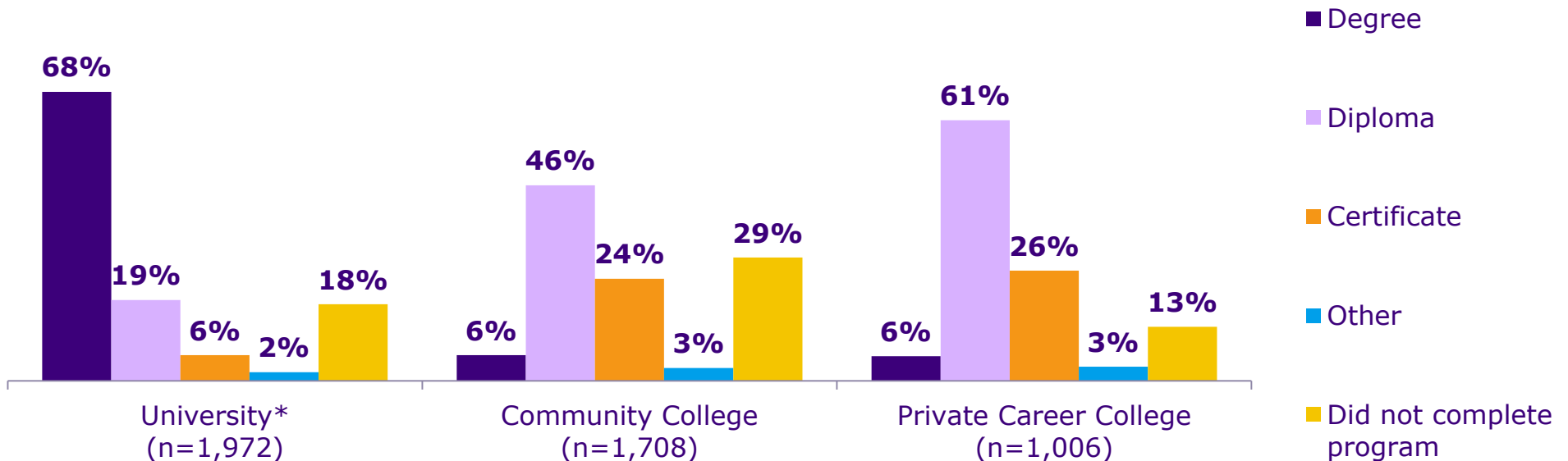
PREVIOUS PSE COMPLETION

Majorities of PCC students have previously received credentials from universities, community colleges and PCCs.

Q11A/B/C. When you attended [university/community college/a private career college], which of the following credentials did you receive?

(Multiple mentions accepted, totals will exceed 100%)

Credentials Received by type of PSE Attended



*For University, "Degree" includes 19% who completed a graduate degree and 49% who completed an undergraduate degree.

PREVIOUS PSE COMPLETION

SUBGROUP HIGHLIGHTS

The following identifies subgroup highlights among those students who did complete the program in which they were enrolled. It should be noted that across the board, older students are more likely than younger students to have received a credential in a university, community college or PCC.

University

- Regionally, students who have previously attended university in the 905 Region (77%, including 23% with a graduate degree) and the City of Toronto (69%, including 19% who have completed a graduate degree) are more likely to have completed a university degree.
- A higher proportion of first-generation immigrants who previously attended university received at least a degree (73%, including 22% with a graduate degree), a diploma (21%) or a certificate (5%). The proportion of first-generation students who previously attended university but did not receive a credential (11%) is much lower than it is among non-immigrant and second-generation immigrant PCC students (41% each).
- Students currently enrolled in Technology and Business programs who previously attended university are most likely to have a degree (80% and 76% respectively) or diploma (16% for each). Those in Fine, Applied and Performing Arts programs who once attended university are least likely to have finished a credential (40%).
- Those who are currently employed full-time and who previously attended university are more likely to have received a credential.
- Students currently enrolled in an OSAP-eligible PCC are more likely to have not completed a university program (19%, vs. 10% of non-eligible OSAP PCCs).
- Students with a disability who previously attended university are more likely to have not completed their program (38% vs. 16% without a disability).

Community College

- Similar to universities, students enrolled in Technology and Business programs, as well as first-generation immigrants, are more likely to have completed a credential at the community college level.
- Students currently enrolled in an PCC that is not eligible for OSAP are more likely to have completed a community college program (62% have a degree and/or diploma vs. 51% respectively).






Subgroup differences are minimal among those who have previously completed a program in a PCC.

PREVIOUS PSE COMPLETION

SEGMENT COMPARISON

A high proportion of New Opportunity Seekers who previously attended university/college did not complete their programs.

% of Students That Completed Programs at a PSE (Q11b)

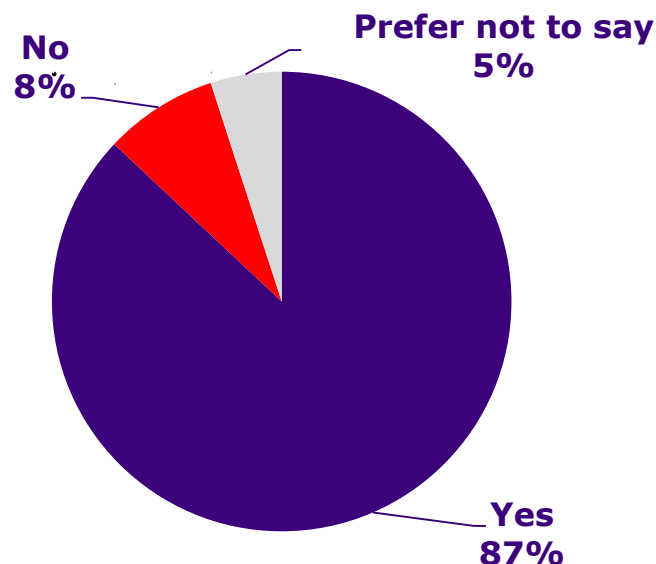
	 Focused Upgraders (n=2,001)	 Fast Trackers (n=1,213)	 New Opportunity Seekers (n=471)	 Frugal & Practical (n=506)	 Homegrown & Resilient (n=331)
University					
Graduate Degree	19%	19%	14%	19%	18%
Undergraduate Degree	50%	49%	48%	56%	45%
Diploma	18%	18%	12%	12%	16%
Other	7%	6%	7%	14%	11%
(Did not complete program)	17%	17%	31%	14%	23%
Community College					
Degree	7%	5%	6%	8%	3%
Diploma	42%	48%	34%	52%	48%
Certificate	24%	22%	31%	23%	22%
Other	3%	3%	2%	3%	5%
(Did not complete program)	32%	29%	37%	23%	30%

COMPLETION OF HIGH SCHOOL

Most PCC students finish high school prior to enrolling in a PCC program.

Q9. Prior to enrolling in your current program, did you complete high school?

**Incidence of Completing High School
Prior To PCC Program**



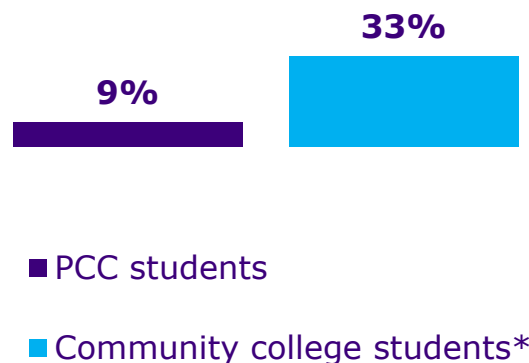
- Students with higher household incomes are more likely than those with lower incomes to have completed high school.
- Students not receiving social or employment assistance are most likely to have completed high school (89%, compared to 78% receiving OW/ODSP and 85% receiving EI/WSIB/other).
- Students in Technology programs are most likely to have completed high school (91%), whereas those in Trades (82%) and Human Services (83%) programs are least likely to have done so.
- International students (94%) are more likely than Canadian students (86%) to have completed high school.

TRANSITION BETWEEN HIGH SCHOOL AND PCC

Only a small proportion of students (9%) enter a PCC program immediately after completing high school.

Q10. Did you enter your current program immediately after completing high school? (BASE: Those who completed high school, n=4,983)

PCC Entry Following High School



- International students are more likely to have entered a PCC immediately after high school than Canadian students (19% vs. 8%).
- Students from Toronto (12%) and the North (11%) are most likely to have enrolled immediately after high school.
- The youngest students are more likely to have entered a PCC program immediately (53% among those 18-20).
- Students in Fine, Applied and Performing Arts programs are more likely than those in other types of programs to have entered a PCC program right away (18%).
- Students in longer-term programs are more likely to have entered directly from high school (13% of programs 18+ months, compared to 7% of programs <6 months in duration).
- Students who enrolled in a PCC program to get their first career/job and those who enrolled for personal interest or growth are most likely to have entered the program immediately after high school (14% each).

***Source: Colleges Ontario 2016
Environmental Scan, p. 16.**



Government Assistance and Financial Issues

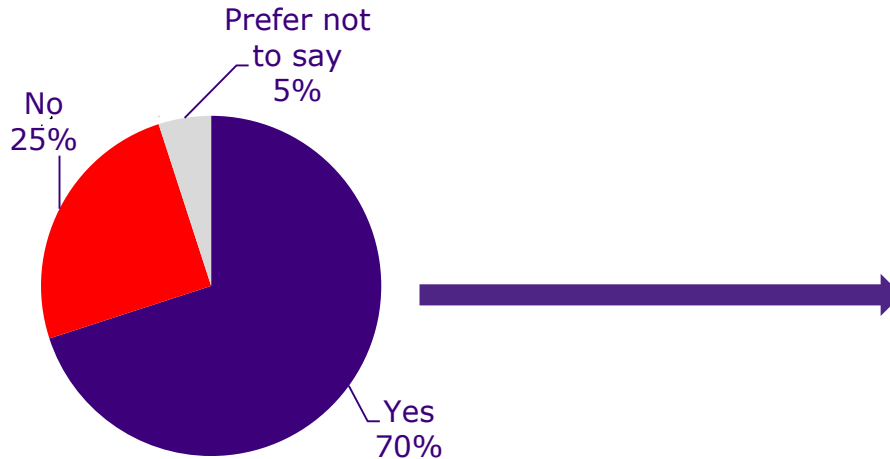
GOVERNMENT FINANCIAL SUPPORT

Seven in ten PCC students receive some form of government support, with the vast majority of these accessing OSAP.

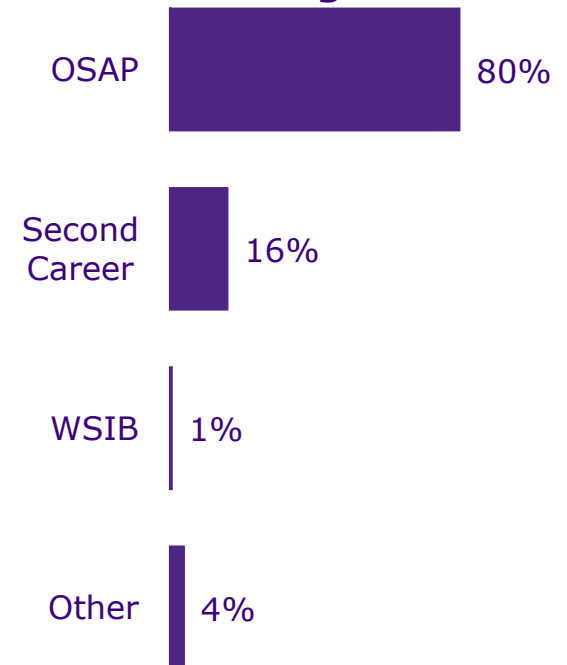
Q12. Did you receive any government funding to help pay for your current program of study?

Q13. Please indicate the type of funding you received (BASE: Those who received funding, n=4,051)

Receipt of Government Assistance



Type of Government Funding



Receipt of government assistance is higher among:

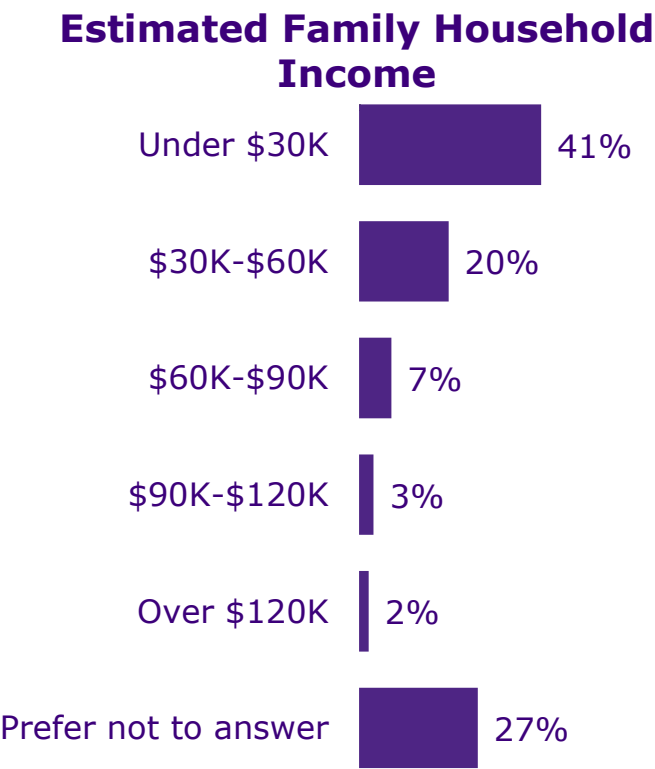
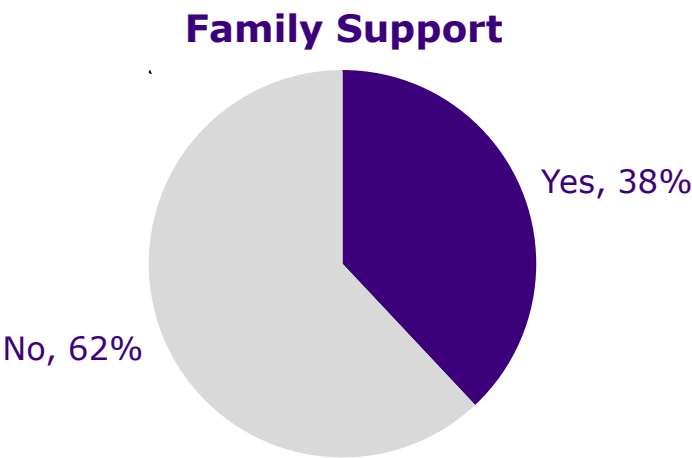
- Older students (75% among those 36+ vs. 61% among 18-20).
- Non-immigrants (77% vs. 67% among first-generation immigrants).
- Those with children (82% among those living at home with children and 80% among single parents).
- Those with lower household incomes and those who are not employed or only employed part-time.

Those in the Frugal and Practical segment are less likely to have received government funding (33%).

FAMILY SUPPORT PRIOR TO ENROLMENT

Only two in five PCC students (38%) indicate they were receiving support from their family when their program began.

Q14. Were you being supported financially by your family at the time your program of study began?
Q15. To the best of your knowledge, what was your family’s combined household income, before taxes, in 2016?



- Family support is most prevalent among:
- Younger students (69% among those 18-20 and 46% among those 21-25 compared to just 33% among those 31-35 and 34% among those 36+).
 - Those living in Toronto and the 905 region (42% and 40%, respectively, vs. 26% among those in the North).
 - Those who are attending a non-OSAP eligible school (47%).
 - Those who are not employed and those who have higher family incomes.
 - Those in the Fast Trackers segment (41%).

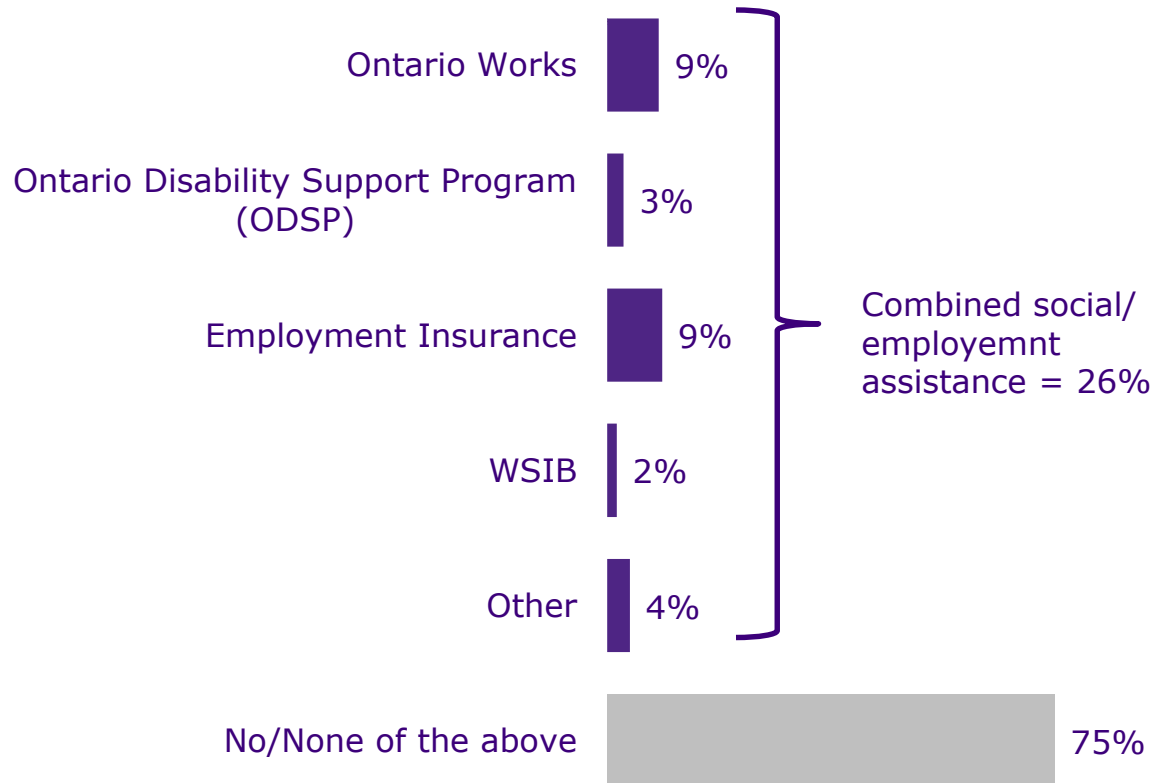
RECEIPT OF SOCIAL/EMPLOYMENT ASSISTANCE

Approximately one quarter of PCC students received social or employment assistance (such as EI or WSIB) prior to enrolling in their program.

Q16. Were you receiving any of the following types of social assistance immediately prior to enrolling in your current program of study?

Those who are most likely to have received some form of social or employment assistance prior to enrolment include:

- Those in Hamilton-Niagara region (42%, including 18% who received Employment Insurance, 10% who received Ontario Works and 7% WSIB).
- Those with a disability (45%, including 15% ODSP and 11% Ontario Works).
- Older students (31% among those aged 36+ vs. 11% among those 18-20).
- Non-immigrants (34% vs. 20% among first-generation students).
- Those not receiving assistance from their families (30% vs. 18% among those who obtained financial help from family members).
- Students with lower household incomes and who were not employed prior to enrolment.
- Those in the Homegrown and Resilient segment (36%).

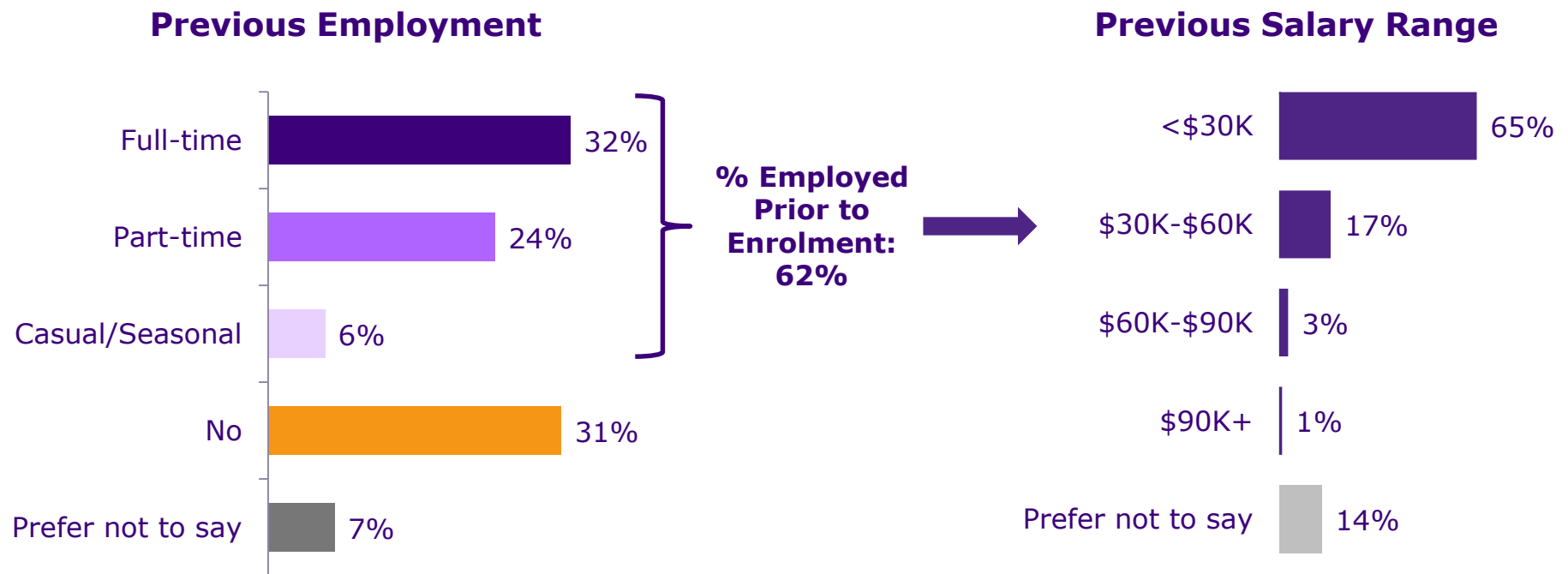


PREVIOUS EMPLOYMENT

Three in five (62%) worked prior to enrolling in a PCC, with most earning relatively low incomes.

Q17. Were you working at any point during the 12 months immediately prior to enrolling in your current program of study?

Q18. Which of the following ranges best describes your annual salary at this job before taxes?



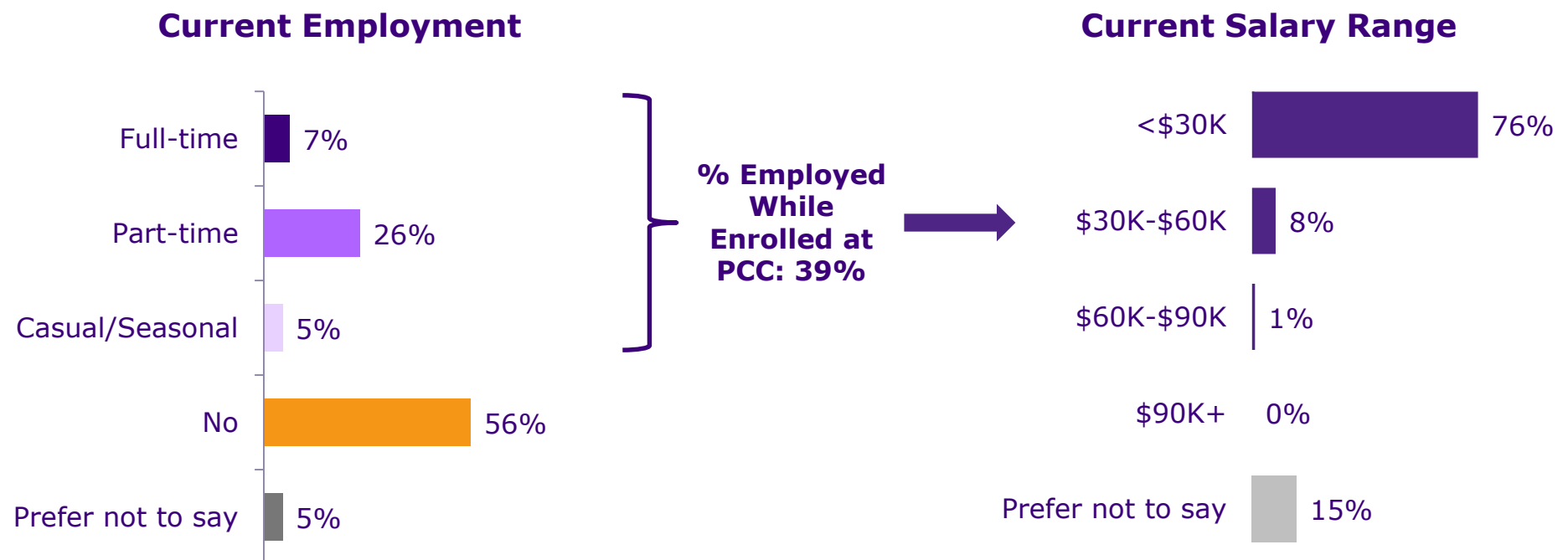
- A higher proportion of students in northern and rural Ontario (66%-74%); non-immigrants (73%); men (70% vs. 60% among women) and younger students (75% among those 21-25 and 72% among those 18-20) report they were employed prior to enrolling in a PCC.
- New Opportunity Seekers are the segment that is most likely to have been employed prior to enrolling (71%).

CURRENT EMPLOYMENT

Two in five (39%) are working while in school, with most earning relatively low incomes.

Q19. Are you currently working while attending your program of study?

Q20. Which of the following ranges best describes your annual salary at your current job before taxes?



- Students in Toronto (44%) and younger students (51% of those age 18-20 vs. just 32% among those 36+) are more likely to be working while taking courses at a PCC.
- New Opportunity Seekers (42%) are also most likely to be employed while currently in a PCC.

Demographic Information

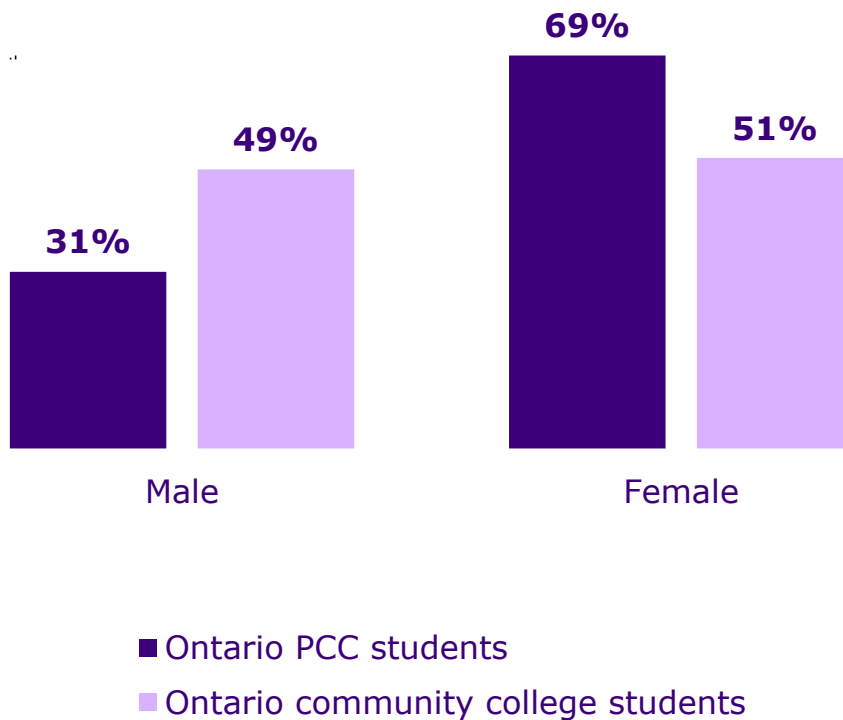
PCC VS. COLLEGE GENDER/AGE COMPARISON

On average, PCC students are more likely to be female (69%) and over the age of 30 (57%) than those at community colleges.

Q21. What is your gender?

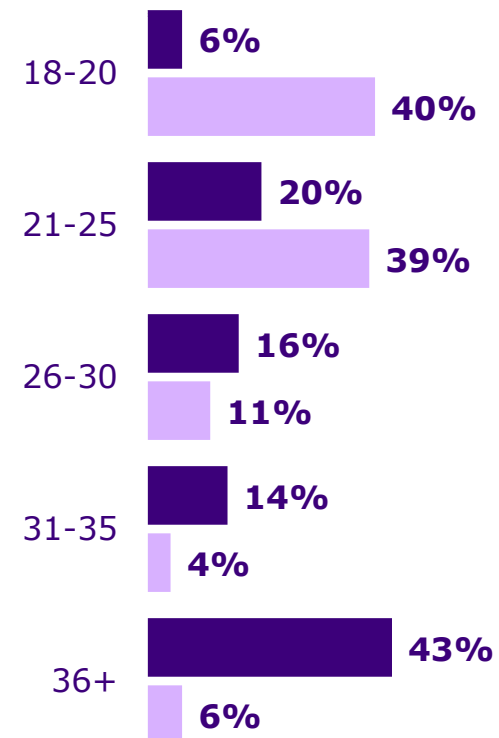
Q23. In what year were you born?

Gender



Don't know/Not stated removed (3% for PCC survey)

Age Categories



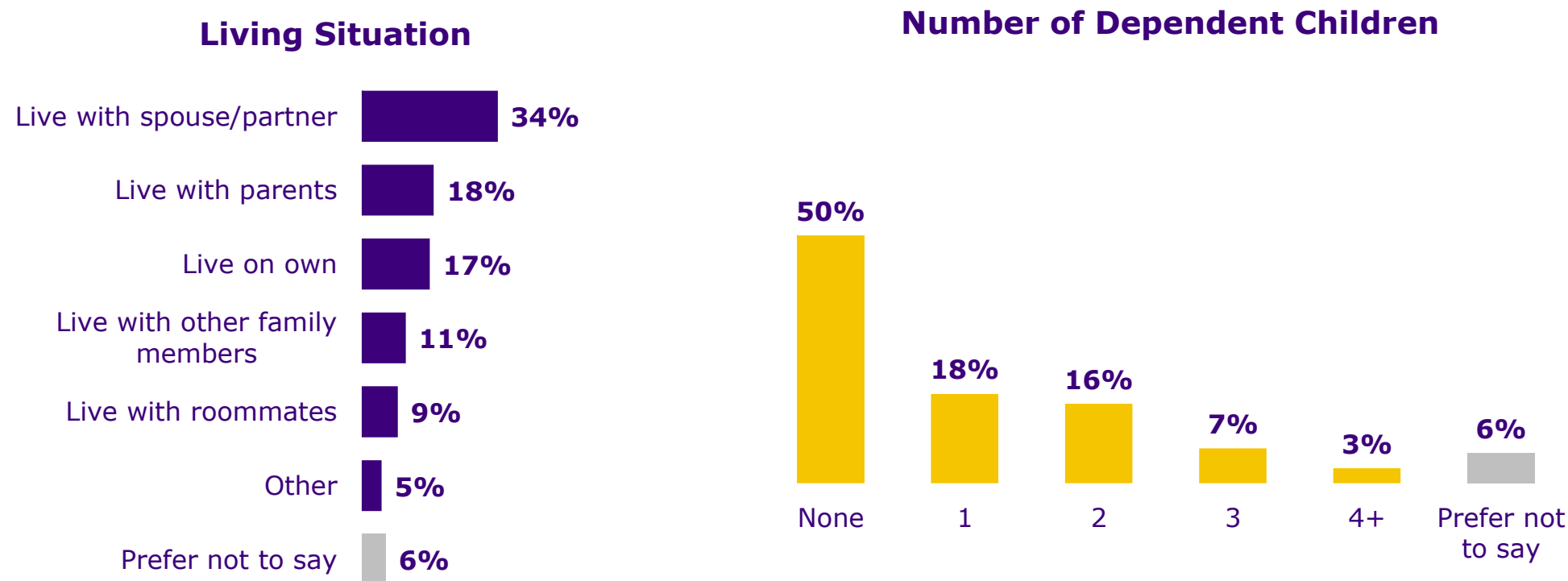
Don't know/Not stated removed (2% for PCC survey)

PCC STUDENT LIVING SITUATION

Only one in five PCC students live with their parents, with nearly half of the PCC student population having dependent children.

Q24. Which of the following best describes your current living situation?

Q25. How many dependent children do you have



- Higher proportions of older students live with a partner or spouse (47% among those 36+) and have at least one child (65%, including 22% who have one child, 26% who have two children and 17% who have 3 or more children). Higher proportions of first-generation immigrants also have children (53% vs. 37% among non-immigrants).
- New Opportunity Seekers (24%) are more likely to live with their parents, with Frugal and Practical Students most likely to live on their own (21%).

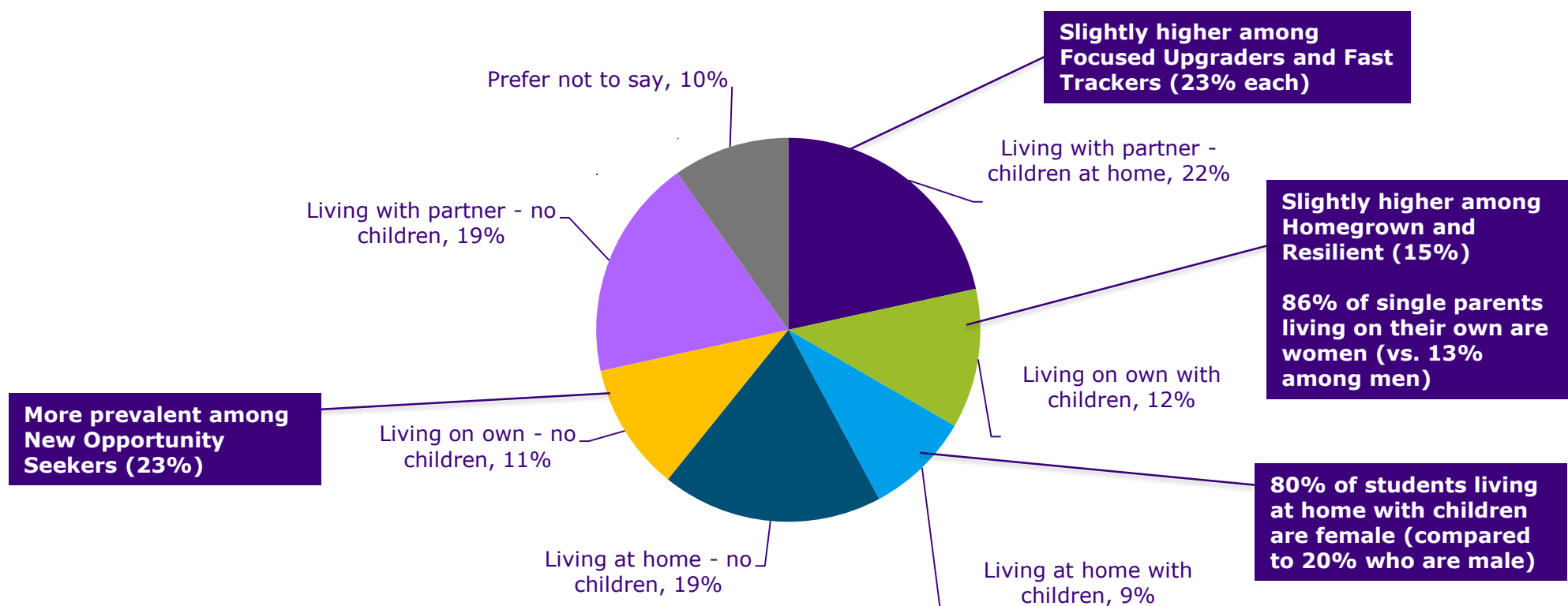
LIVING SITUATION ANALYSIS

Two in five PCC students have children, with more than one in ten (12%) being single parents.

Q24. Which of the following best describes your current living situation?

Q25. How many dependent children do you have?

Marital/Parental Status



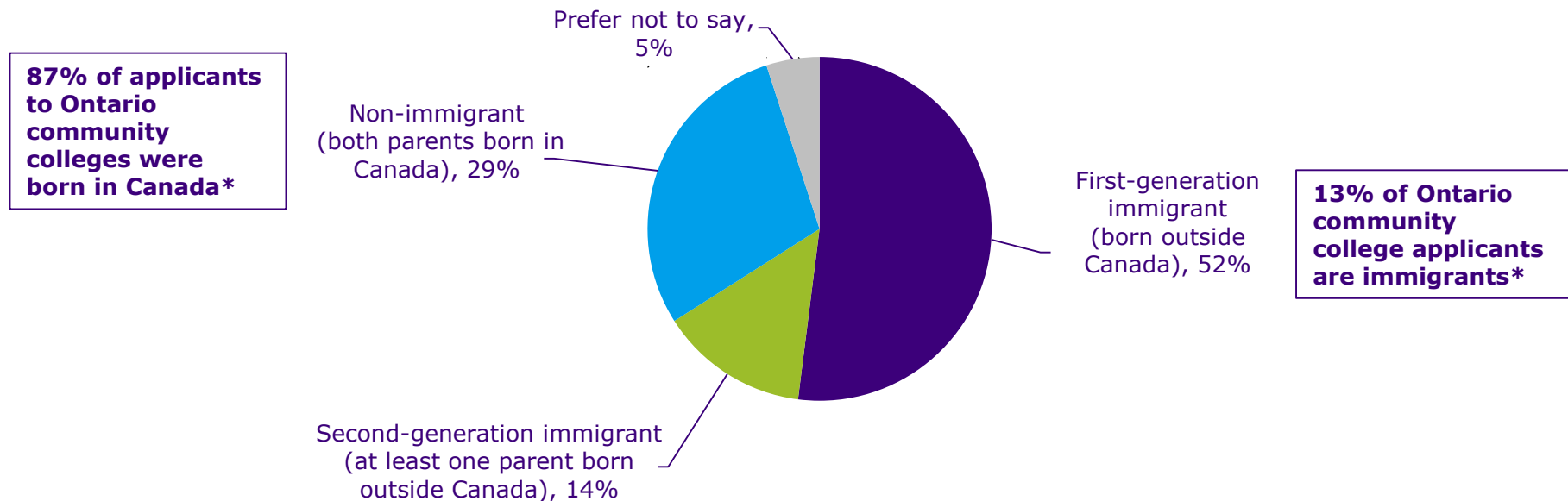
IMMIGRATION STATUS

Compared to community college applicants, the PCC student population includes a significantly higher proportion of learners (52%) who were born outside Canada.

Q26. Were you born in Canada, or in a country other than Canada?

Q27. Please indicate where each of your parents were born.

**Immigration Status –
Ontario PCC students (All respondents)**



*Data regarding community college applicants taken from Colleges Ontario 2016 Environmental Scan, p. 14. Immigrant data excludes international students, as well as respondents who selected "N/A" or "prefer not to answer."

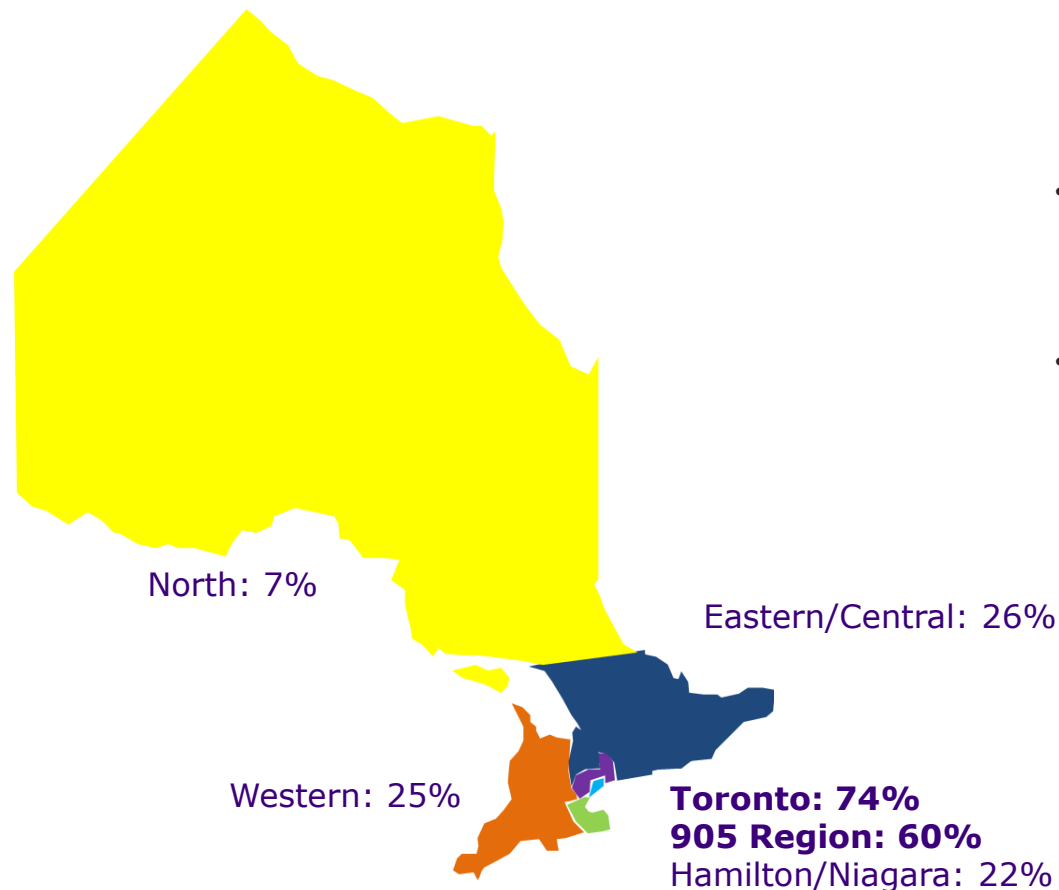
IMMIGRATION STATUS DEMOGRAPHIC COMPARISON

The majority of PCC students in Toronto and the outlying 905 region are first-generation immigrants.

Q26. Were you born in Canada, or in a country other than Canada?

Q27. Please indicate where each of your parents were born.

% of first-generation immigrants by region



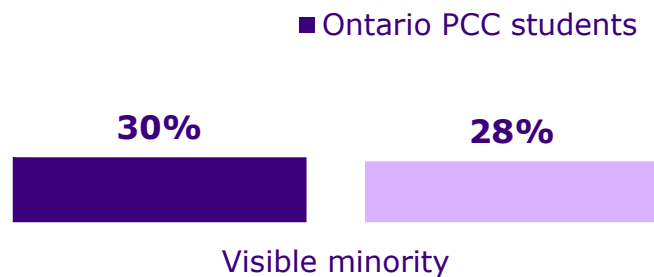
- A higher proportion of older PCC students are first-generation immigrants (64% among those 36+ and 58% among those 31-35, dropping to 25% among those 18-20).
- Conversely, the majority of younger students in PCCs were born in Canada (74% among those 18-20 and 64% among those 21-25).
- A majority of Focused Upgraders (54%) and Fast Trackers (52%) are first-generation immigrants.

INDIGENOUS AND VISIBLE MINORITY STATUS

Three in ten (30%) of PCC students self-identify as a visible minority, with four percent self-identifying as indigenous.

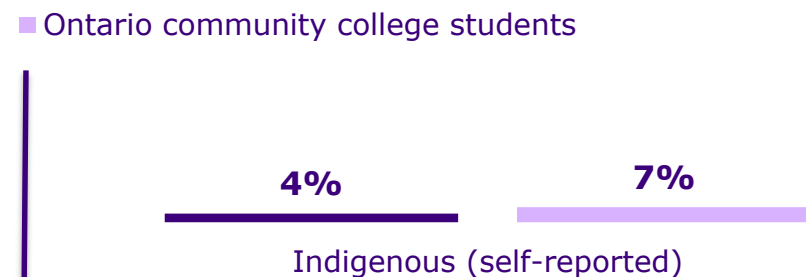
Q28. Do you consider yourself to be a member of a visible minority group?

Q29. Do you identify yourself as an indigenous or Aboriginal person? This includes people who identify as being First Nations, Métis or Inuit.



- Self-reported visible minority status is highest among those living in Toronto (37%) and the 905 Region (38%).
- This is also slightly higher among older students (33% among those age 36+ vs. 23% among those 18-20).
- Three quarters of Frugal and Practical students self-identify as a visible minority (73%).

**Don't know/Not stated removed
(16% for PCC survey)**



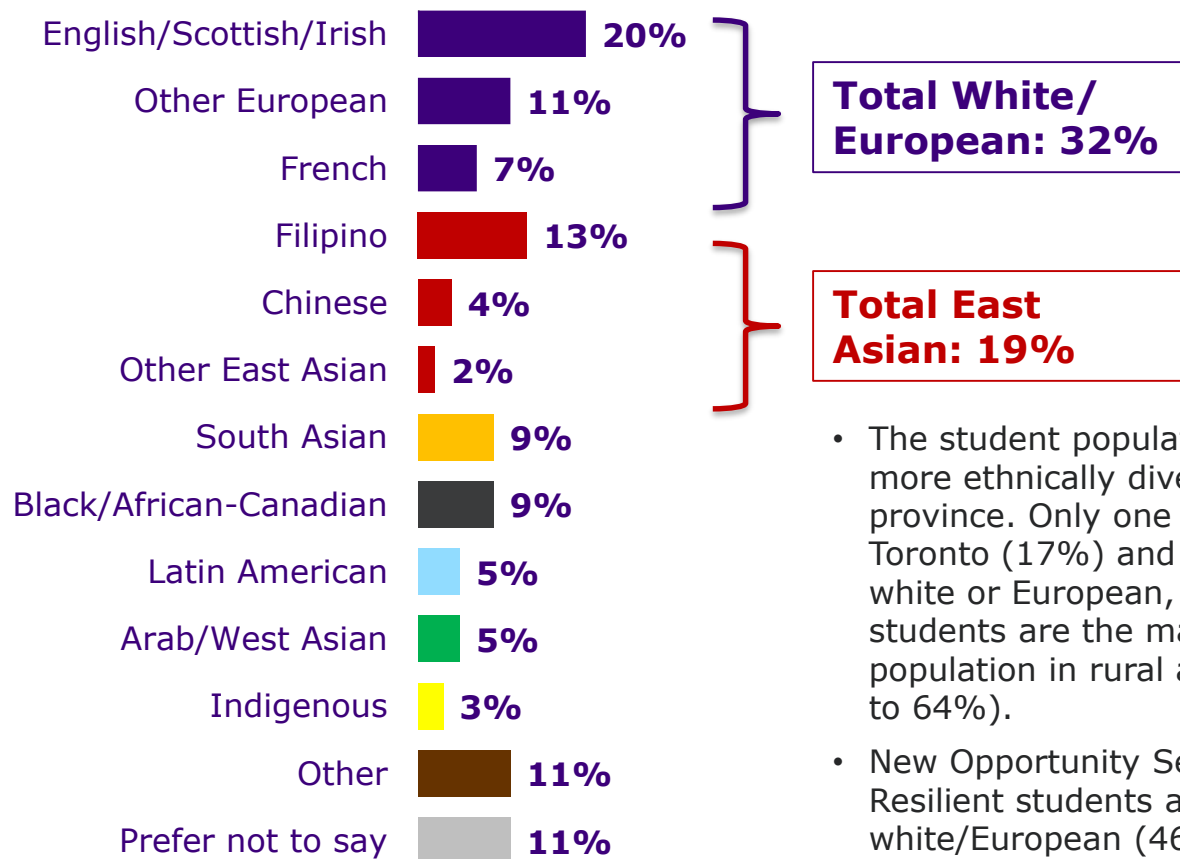
- The highest incidence of self-reported indigenous status is among those living in northern Ontario (16% compared to just 2% in Toronto and the 905 Region).

**Don't know/Not stated removed
(9% for PCC survey)**

ETHNICITY

The Ontario PCC student population is extremely diverse.

Q30. People living in Canada come from many different cultural and racial backgrounds. Which of the following best describes your ethnic background or nationality?

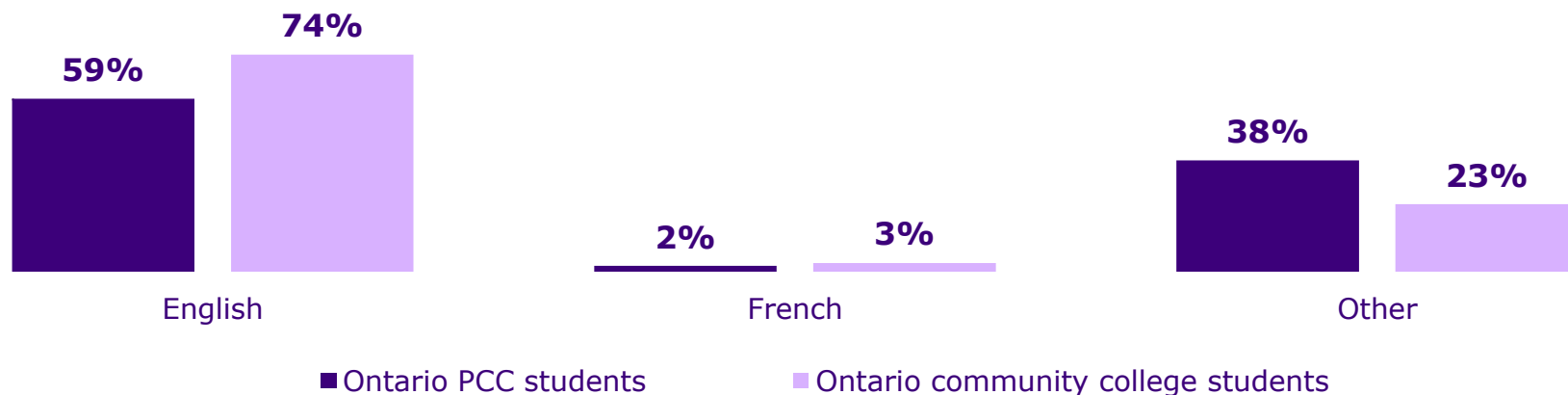


- The student population in the GTA is much more ethnically diverse than in the rest of the province. Only one in five PCC students in Toronto (17%) and the 905 Region (20%) are white or European, whereas white/European students are the majority of the PCC student population in rural and northern Ontario (54% to 64%).
- New Opportunity Seekers and Homegrown and Resilient students are more likely to be white/European (46% and 45% respectively).

LANGUAGE

Nearly two in five PCC students (38%) indicate their first language is neither English nor French.

Q31. What is your first language?



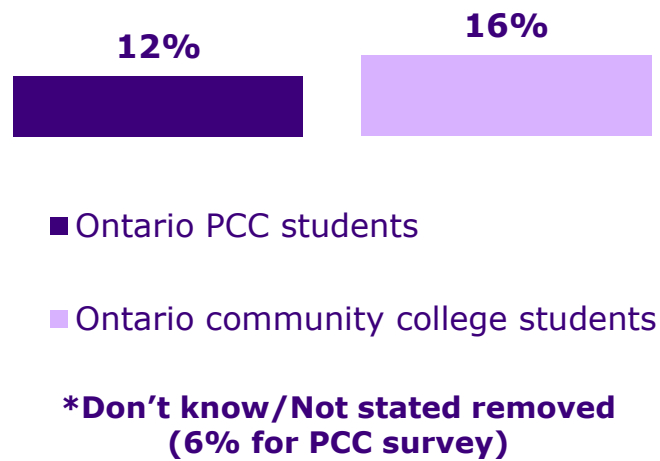
- Students at PCCs in the Greater Toronto Area are more likely to speak a non-official language as their first language (52% among those in Toronto and 49% among those in the 905 Region). In other parts of rural Ontario, approximately one in five students speak a non-official language (15% to 20%), with just two percent of students in northern Ontario doing so.
- Similarly, a higher proportion of older PCC students speak something other than English or French as their first language (46% among those 36+ and 44% among those 31-35 compared to just 19% among those 18-20).
- A higher proportion of students who speak French as their first language are found in northern Ontario (11%) and Eastern/Central Ontario (6%).
- Two-thirds of first-generation immigrants speak a non-official language (66%), with one in ten second-generation immigrants identifying a language other than English and French as their first language (9%).
- Focused Upgraders and Fast Trackers are most likely to speak a non-official language (39% and 38% respectively).

DISABILITY STATUS COMPARISON

One in ten PCC students (12%) report having a disability, with the incidence of this higher among younger and rural/northern students.

Q32. Do you have a physical, intellectual, mental health or learning disability?

% with a disability*



- The proportion of students with a disability is highest in the North (26%) and is significantly lower among those in Toronto (6%) and the 905 region (8%).
- Higher proportions of younger students (22% among those 18-20 vs. 8% among those 36+) and non-immigrants (24%) report having a disability.
- Higher proportions of those who have accessed government supports, including WSIB (48%) and Ontario Works/ODSP (27%), report having a disability.
- A higher proportion of those who did not previously complete high school also report having a disability (18% vs. 11% among those who did finish high school).
- Those in the Homegrown and Resilient segment are among those most likely to report having a disability (22%).

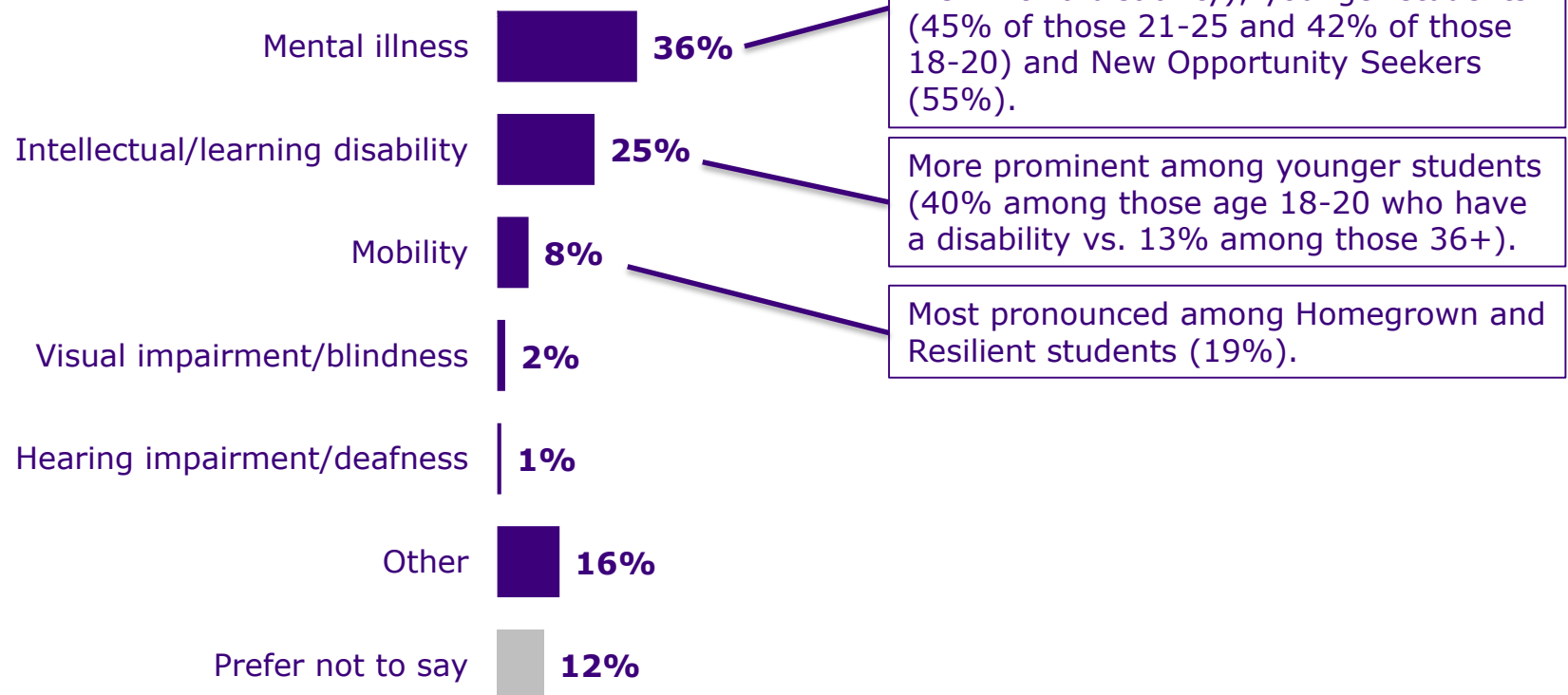
TYPE OF DISABILITY

PCC students with a disability are most likely to report they have a mental illness or an intellectual/learning disability.

Q32. Do you have a physical, intellectual, mental health or learning disability?

Q33. What is the nature of your disability? (Base: Those with a disability, n=626)

Nature of Disability – PCC Students



Conclusions

CONCLUSIONS

Conclusions emerging from the study.

- The results of this survey demonstrate that Ontario's private career colleges serve students who have characteristics that are distinct from students who attend Ontario community colleges. PCC students are further from the secondary school system in the sense that they tend to be older and more independent than community college students. This means that many PCC students face a much more complex set of challenges in their lives, including the fact that a high proportion of PCC students have children, are not supported financially by friends or family members and tend to have low incomes.
- As well, it is apparent that PCCs serve as an important "bridge" to the Canadian workforce for recent immigrants. These results show that a large number of students enrolled at PCCs (particularly in the Greater Toronto Area) are first-generation immigrants, and many of them have a significant amount of prior educational attainment from their respective home countries.
- The segmentation of PCC students showcases the different characteristics of learners within the PCC system. This is a potential marketing tool that can help CCO's members craft communications and messaging to different types of students.
- This dataset of nearly 6,000 respondents represents a significant repository of benchmark data that includes attitudinal, behavioural and demographic data of PCC students. A significant amount of deeper analysis, including by program and by school, can be conducted in order to understand trends at these "micro" levels.

FOR FURTHER INFORMATION OR QUESTIONS CONTACT:



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