

Study for the Needs and Interests for a French-Language University in Central and Southwestern Ontario



Final Report

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TABLE OF CONTENTS

| | |
|--|-----------|
| Terms, Definitions and Acronyms | i |
| Executive Summary | ii |
| SECTION 1: Background | 1 |
| 1.1 An Overview of Different Perspectives on Filling the Access Gap to French-Language University Programs in CSW Ontario..... | 1 |
| 1.2 Study on the Needs and Interest For a French-language University in CSW | 2 |
| SECTION 2: Methodology | 3 |
| 2.1 Document Review..... | 4 |
| 2.2 Key informant interviews | 4 |
| 2.3 Postsecondary student interviews | 5 |
| 2.4 Focus Groups | 6 |
| 2.5 Employer's Survey..... | 6 |
| 2.6 Student Survey | 9 |
| 2.7 Market Analysis | 11 |
| 2.8 Synthesizing Lines of Evidence..... | 12 |
| SECTION 3: Strengths and Limitations of the Research | 13 |
| SECTION 4: Findings | 15 |
| 4.1 Level of Student Interest in a French-Language University in CSW Ontario..... | 15 |
| 4.1.1 Most influential factors considered by secondary students when deciding whether or not to pursue a postsecondary education | 15 |
| 4.1.2 Student language preference for postsecondary education | 16 |
| 4.1.3 Factors influencing student language preferences | 19 |
| 4.1.4 Secondary student intention to pursue postsecondary education in French | 21 |
| 4.1.5 Factors that influence student decisions to undertake PSE in French | 21 |
| 4.1.6 Preferred postsecondary program pathways..... | 24 |
| 4.1.7 Preferred postsecondary program options | 25 |
| 4.1.8 Conclusions | 26 |
| 4.2 Level of Demand for French-Speaking Postsecondary Graduates (FSPSG) | 27 |
| 4.2.1 The demand of employers for FSPSG in CSW Ontario..... | 27 |
| 4.2.2 Labour market demand projections for French-speaking postsecondary graduates by 2020 and 2030 | 30 |
| 4.2.3 Labour Market Gap of FSPSGs in CSW Ontario..... | 32 |
| 4.2.4 The degree of difficulty recruiting FSPSGs in CSW Ontario | 35 |
| 4.2.5 Employers intention to establish partnerships with a French-language university | 36 |
| 4.2.6 Conclusions | 37 |
| 4.3 Expectations of, and Aspirations for, a French-Language University in CSW Ontario..... | 37 |
| 4.3.1 Essential elements of a French-language university (including programs and service offerings)..... | 38 |
| 4.3.2 Desirable partnerships identified by students and Francophone community members for a French-language university..... | 41 |
| 4.3.3 Perceived role of a French-language university to preserve the vitality of French-speaking communities in Ontario | 41 |



| | | |
|------------|--|-----------|
| 4.3.4 | The expected role of government to build the demand for a French-language university | 43 |
| 4.3.5 | Preferred ways to differentiate and market the French-language university..... | 43 |
| 4.3.6 | Preferred locations for a French-language university in CSW Ontario..... | 44 |
| 4.3.7 | Conclusions | 46 |
| 4.4 | Market Analysis for French-language University | 46 |
| 4.4.1 | The supply of youth, adult learners, and international postsecondary students | 46 |
| 4.4.2 | The supply of postsecondary institutions to meet demand..... | 59 |
| 4.4.3 | Comparison between supply of French-speaking graduates and the demand of employers in CSW Ontario..... | 60 |
| 4.4.4 | Conclusions | 62 |
| 4.5 | Analysis Summary..... | 62 |

Terms, Definitions and Acronyms

| | |
|--------------|---|
| CSO | Centre-Sud-Ouest |
| CSW | Central Southwestern |
| ESB | English School Board |
| FPS | Federal Public Service |
| FSB | French School Board |
| FTE | Full Time Equivalent |
| FSPSG | French-Speaking Postsecondary Graduates |
| IRCC | Immigration, Refugees and Citizenship Canada |
| LFS | Labour Force Survey |
| MAESD | Ontario Ministry of Advanced Education and Skills Development |
| MOF | Minister of Finance |
| OLPLM | Official Language Program for the Linguistic Minority |
| PSE | Postsecondary Education |
| PSG | Postsecondary Graduates |
| PSS | Postsecondary Students |
| RÉFO | Regroupement étudiants franco-ontarien |
| STP | Student Transition Project |

Executive Summary

Overview

R. A. Malatest and Associates Ltd. (Malatest), a third party market research firm, was commissioned to conduct an independent assessment of student interest and market demand for the creation of a French-language university in the Central and Southwestern (CSW) regions of Ontario. The study offers the Ontario Ministry of Advanced Education and Skills Development an informed base case scenario (conservative) and high demand scenario upon which to guide decisions on the establishment of a possible French-language university. It does this by examining the extent to which the establishment of a French-language university would have demand (i.e. enrollment) to justify the establishment of such an institution, and by examining whether the labour market in Ontario could absorb the potential number of graduates from such an institution. Further, a comprehensive stakeholder consultation process was conducted to consolidate expectations of, and aspirations for, a French-language university in CSW Ontario.

Methodology

The current study employed mixed-methods to collect the necessary information for the assessment. These included:

- Qualitative consultation with 30 francophone community organizations, service providers, advocacy groups and educational institutions using key informant and focus group modalities;
- Qualitative consultation with 55 francophone postsecondary students (including adult learners and newcomers) attending 7 postsecondary institutions in Ontario using key informant and focus group modalities;
- A randomized telephone survey of 500 employers (response rate = 41%); and
- A mixed-mode survey of 854 grade 11 and 12 students attending French school boards (FSB) and English school boards (ESB) enrolled in CSW;
- A document review; and
- Secondary data sources to provide an Ontario context and project changes in population.

The research was conducted between December 1, 2016 and March 7, 2017.

Findings

Student Interest

Measuring the level of student interest for French only postsecondary education (PSE) pathways is complex. Student findings demonstrate a high degree of interest for French PSE programs and courses. Student preferences for French only institutions underestimated

student's intention to attend a French-language postsecondary institution. FSB and ESB students reported higher intentions of attending a postsecondary institution in French (33% FSB versus 22% ESB) than revealed by student preferences for a French only institution (13% FSB versus 1% ESB). These estimates are of unknown validity due to a lack of French only PSE pathways currently available and familiar to students.

Language preference for PSE largely reflects student desire to improve their labour market outcomes (93%), and maintain their bilingual capabilities (90%). Factors that influence FSB and ESB student decisions to undertake PSE in French are different. Factors with the most influence on FSB students are the lack of courses available in French (59%), the programs lack of reputation (56%), and the lack of established reputation of a French-language university or college (55%). ESB students are most influenced by the lack of desired courses available in French (67%), the high cost of living associated with moving to a location where there is a French postsecondary institution (62%), and insecurity in expressing themselves verbally/written in French (57%).

Three quarters of secondary students intend to pursue a bachelor's degree through a university as their first choice program pathway (76%). No differences in preferred program options were reported between FSB and ESB students. The top program options included: 1) science and math; 2) health science; 3) social science; and 4) business, commerce, and management.

Most postsecondary students interviewed reported a preference for attending a French-language university at the undergraduate level and/or pursuing a graduate degree at a French-language university in CSW Ontario. Existing PSE institutions were not described as meeting French student needs.

Employer Demand

French-speaking postsecondary student graduates (FSPSGs) represent 4.4% of the current CSW workforce. Employers project that over the next fourteen (14) years their demand for FSPSGs will increase by 61%, requiring an additional 109,722 FSPSGs. As well, over the same time period 59,834 FSPSGs are estimated to retire. By 2030 it is estimated that there will be a labour market gap of 174,226 FSPSGs. This growth in demand is expected to be underreported as it only includes employers that currently employ French-speaking employees. As well, it does not include FSPSGs leaving labour force for other reasons than retirement.

The majority of the growth is projected to occur over the next few years (2016 to 2020), and is estimated to result in 67,695 FSPSGs positions being created. Employers currently report encountering difficulty in hiring FSPSGs (67% of employers reporting),¹ often having to recruit outside of the province in Quebec, New Brunswick, or out of the country (France). The large

¹ Source: 2017 CSW Ontario Employers Survey

increase in number of FSPSG positions is expected to exacerbate current challenges employers are facing in filling FSPSGs positions.

Expectations for a French Language University

Postsecondary students and key informants mostly presented a common vision on the essential elements of a French language university in CSW Ontario. They described a university with the same physical, social, cultural, and service offerings available in English universities in the area. This means it should have:

- Program options that appeal to a general student population;
- The physical infrastructure that any high quality university would have;
- Supports for new immigrant learners;
- Cultural and linguistic activities (e.g., a French language radio station);
- Work placement, co-op programs, and internships;
- Face-to-face (in-class) learning;
- Francophone learning environment;
- Established faculty; and
- Research centers.

Postsecondary students and key informants agreed that a French-language university would help preserve the vitality of French-speaking communities in Ontario. Stakeholders would like the university to promote both the French-language and culture throughout the province as a whole and in CSW Ontario in particular. Areas of divergence between interviewed stakeholder's center on the perceived value and preference for a stand-alone institution (65% preference) versus a provincial institution with multiple satellite campuses throughout the province (35% preference). The tension appears to surround avoiding the replication of past failed attempts at establishing French postsecondary institutions using a satellite campus structure. Stakeholders expressed the need for a French-language university that could accommodate at least 10,000 students in order to provide the quality student experience and sense of belonging valued by respondents. Respondents who preferred a provincial network were largely Ottawa based, and argued for equal access to a French-language university close to home. There was also an expectation that the Government of Ontario would play an active role in promoting the university as a viable option for French-speaking learners through extensive marketing campaigns and other strategic initiatives described in the report.

Location

Most secondary students (59% FSB, 72% ESB), postsecondary students (90%), and key informants (85%) identified Toronto as the preferred site for the French-language university. Toronto was described as a desirable location as a large multicultural city with the largest francophone population in CSW Ontario. Further Toronto was said to have an existing French-language infrastructure, excellent public transportation, a large number of employers for partnership building, and the most desirable location of newcomer learners.

Market Analysis

Potential enrollment in a proposed French-language postsecondary institution is projected to attract between 3,061 and 3,515 students per year. However, it should be recognized that only a portion of such students will be recent graduates transitioning from high school to the institution.

The projected enrollment suggests that estimates be made for several key source populations, namely adult learners and international students. For the purpose of this study, we estimated potential enrollment to be consistent with the CSW's current share of such learners. This likely underestimates the appeal of a French only university currently unavailable in CSW Ontario.

Analysis of the demand for French speaking workers suggests that the Ontario job market will have no issues in terms of absorbing larger numbers of French speaking graduates that will occur should a French-language university be established.

Anecdotal data suggests that the establishment of a French-language university may have some adverse effects on existing Ontario French/bilingual postsecondary institutions. It is estimated that upon establishment of a French-language university in the CSW, a number of students enrolled in other French/bilingual institution will transfer to the new institution. This transfer of students is likely to improve labour market outcomes of Francophone students said to be struggling to complete their PSE within standard timelines.

Conclusion

There is interest and a demand for a French-language university. The estimated supply and demand calculations represent the "best estimate" to likely enroll in a French only postsecondary institution given the very compressed time in which the consultant had to complete the study and limited ability to conduct research with important source populations such as French speaking adults (for re-training aspirations) as well as the views of international students. Estimates of labour market demand become less reliable the further into the future they are projected. They are affected by changes to the economy and government policy (both provincial and federal). Estimating students' intentions also become less reliable over the long-term. However, there is a clear trend of increasing demand for French-language postsecondary education in the Central and Southwestern regions of Ontario.

SECTION 1: Background

The Ontario Ministry of Advanced Education and Skills Development (MAESD) is considering how best to address different perspectives on reducing the access gap to French-language university programs in Central Southwestern (CSW) Ontario following their commitment to create a French-language university in 2016. They commissioned a report to provide them with supporting evidence of secondary and postsecondary students', employers' and the broader Francophone community's needs for a French-language university in CSW Ontario. The scope of the report does not examine the level of interest and demand for a French-language university for the province of Ontario, but rather, is limited to the CSW region of Ontario.

R.A. Malatest and Associates Ltd., a third party market research firm, was selected to conduct this research. This report contains Malatest's independent assessment of student interest and market demand for the creation of a French-language university in the Central and Southwestern (CSW) regions of Ontario. The methodology relies on information collected through the study, as well as development of supply/demand estimates based on various population and employer demand scenarios that were developed for this study.

1.1 An Overview of Different Perspectives on Filling the Access Gap to French-Language University Programs in CSW Ontario

In March 2016, the Advisory Committee on French-language Postsecondary Education for CSW Ontario submitted a report recommending the creation of a French-language university by 2020. The recommendation included \$60 million start-up funding over four years (2016-2020) to ensure that the new French-language university is operational by 2020, and 10-year capital funding, as well as various financial incentives to encourage student enrollment.

The decision of the Advisory Committee was based on the conclusion from studies that suggest that a significant number of students in Ontario's French-language secondary schools wish to pursue studies at an institution close to home. These studies maintain that the lack of access to French-language programs, particularly in CSW Ontario, requires that many French-language students pursue their postsecondary studies in English.

Ontario's bilingual universities are concerned that the introduction of a new French-language university will weaken existing French-language postsecondary education (PSE) institutions. They have presented different perspectives on addressing the access gap to French-language university programs in CSW Ontario to the province. In particular, they have proposed that developing new programs in CSW Ontario through partnerships among existing bilingual universities would be more cost efficient than creating a new university. They are also concerned that stretching existing funding in order to create a new French-language university would only weaken the existing French-language postsecondary network. Further, their research consulting graduating students from French-language

secondary schools in CSW revealed that students preferred pursuing their postsecondary education (PSE) in a bilingual, rather than French setting.

1.2 Study on the Needs and Interest For a French-language University in CSW

R.A. Malatest and Associates Ltd. (Malatest) was hired to conduct the study on the needs and interest for a French-language university in CSW Ontario. The study was designed to fill the evidence-based knowledge gap on the expressed and perceived needs for a French-language university in CSW Ontario. The study examines the extent to which the establishment of a French-language PSE would: a) have student demand (i.e. enrollment) to justify the establishment of such an institution, and b) whether the labour market in Ontario could absorb the potential number of graduates from such an institution.

To better understand the needs and interest for a French-language university, a mixed-method approach was used to answer the following five research questions:

1. What is the level of interest and need amongst secondary and postsecondary students for a French-language university in CSW Ontario?
2. What is the demand for a French-language workforce in the CSW Ontario region?
3. What are the expectations of, and aspirations for, a French-language university in CSW Ontario?
4. What is the current and projected labour market demand for a French-language university in CSW Ontario?
5. Are there any gaps in the workforce demand for a French-language postsecondary education to the supply of individuals with a French-language postsecondary education?

SECTION 2: Methodology

A mixed-method methodology was used to examine the level of interest and need for a French-language university in CSW. These methods included a document review, interviews with key informants, focus groups, surveys, and an analysis of secondary data. All lines of evidence were triangulated to answer each of the five main research questions and to guide the development of a French-language university. The methodology was designed to consider the perspectives from eight stakeholder groups as illustrated in Table 2-1.

Table 2-1: Methodology Summary Table

| Stakeholder Group | Data collection method | Sample Characteristics |
|---|---|---|
| 1. Secondary students in grades 11 and 12 attending a French School Board (FSB) | Survey administered in-person or online depending on FSB research ethics approval | Convenience sample of 387 students in two FSB in CSW Ontario* |
| 2. Secondary students in grades 11 and 12 attending English School Board (ESB) currently enrolled in French Immersion or Extended French programs | Survey administered in-person or online depending on ESB research ethics approval | Convenience sample of 467 students in four ESB in CSW Ontario* |
| 3. Employers (government, non-government, for profit, not-for-profit) | Mixed Mode: Survey administered by phone or online, and some key informant interviews | Random sample of 500 Employers in CSW Ontario, 4 key informant interviews, and secondary data sources for Government of Canada employees |
| 4. French-language postsecondary students (PSS) | Mixed-mode: Focus group and key informant interviews with targeted institutional approach: <ul style="list-style-type: none"> 10 students attending an English University (UofT or Ryerson U) 8 students attending a bilingual university in CSW (Laurentian U) 9 students attending a bilingual postsecondary institution (Glendon) 1 student attending a French University² 10 students attending a French College in CSW Ontario (Collège Boréal, TO Campus only) 10 students attending a French College in Ottawa (La Cité collégiale) 7 students attending a bilingual university in Ottawa (UofO) Total = 55 postsecondary student | <ul style="list-style-type: none"> Purposeful sample of PSS attending a bilingual university and French-language College in Ottawa for a focus group (n=6), through social media recruitment Purposeful sample of PSS actively recruited in-person in public spaces on institutional campuses, with target quotas for respondent type: youth (2/5th of the sample), adult learners (1/5th of the sample), international students (1/5th of the sample), and newcomer learners (1/5th of the sample) |

² This student was recruited by chance using social media. The student lives full-time in Toronto and commutes to Université de Montréal for access to FLU.

| Stakeholder Group | Data collection method | Sample Characteristics |
|--|---|---|
| | respondents | |
| 5. Francophone community organizations, service providers, advocacy groups | Mixed-mode: Focus group and key informant interviews** <ul style="list-style-type: none"> Total =27 key informants | Purposeful sample of 27 key informants participating in either one focus group in Toronto or individual telephone-based interviews: <ul style="list-style-type: none"> 14 key informants from CSW Ontario organizations 11 Key informants from provincial organizations 2 Key informants from Pan-Canadian organizations |
| 6. Publicly assisted / funded educational institutions | Mixed-mode: Focus group and key informant interviews** <ul style="list-style-type: none"> Total = 3 respondents | Purposeful sample of 2 key informants from a French-language College, and one key informant from a bilingual university. |

*Time restrictions associated with completing the research within the research contract timetable prohibited the collection of a random sample of secondary student in English and French school boards. The convenience sample of secondary students underrepresented students attending FSBs in CSW Ontario, and resulted in a largely Toronto-centric secondary student sample.

**Respondents from francophone community organizations, service providers, advocacy groups and publically assisted/funded educational institutions (stakeholder group 5 & 6 above) either participated in a focus group held in Toronto (8 informants) or participated in individual telephone-based interviews in order to accommodate stakeholder preferences.

2.1 Document Review

A systematic analysis of related secondary documents was used to develop primary data collection tools for this study, to build sound assumptions for the labour market projection and gap analysis, and to situate our findings within the relevant landscape of studies that examined the potential need for an French-language university in CSW Ontario. Documents were collected through multiple channels: internal and external documents provided by the Ministry, other data available from Statistics Canada and/or Ontario Ministry of Finance, similar Malatest labour market reports, and external documents and reports found through a systematic review of online resources. Only recent research studies or reports citing primary data collection and analysis after 2009 were deemed relevant for direct comparison to this report. The list of relevant documents reviewed in this report is available in the Technical Appendix (under separate cover).

2.2 Key informant interviews

Malatest worked with the Ministry to identify a list of pan-Canadian organizations, provincial organizations, and CSW Ontario organizations that could offer insight into the need and interest for a French-language university. A sampling strategy was proposed to support appropriate representational targets for a French-language university. The

sampling strategy oversampled regional CSW Ontario stakeholders (over 50%), included essential provincial stakeholders for a French-language university (40%), and a small percentage of pan-Canadian stakeholders. Selected key informants were invited by participate in a focus group or key informant interview by phone and/or by email where the information was available. Due to tight research deadlines, many key informants preferred to participate as key informant interviews rather than participate in a focus group.

Malatest conducted individual telephone-based interviews with 22 francophone community organizations, service providers, advocacy groups and educational stakeholders (see Table 2-1). Two pan-Canadian level respondents, 12 provincial level respondents, and 8 CSW Ontario level respondents distributed throughout London, Windsor, Penetanguishene, Durham/Oshawa, Welland, Waterloo, Sarnia, and York participated in this study as key informants.³ Prior to each telephone-based interview, the interviewees were provided with a semi-structured interview guide in order to consider their responses to questions in advance. The interview and focus group guide for these stakeholders were the same in order to ensure consistency across data collection modalities. See the Technical Appendix for the key informant interview and focus group guide.⁴

2.3 Postsecondary student interviews

Malatest recruited 49 postsecondary students interested in participating in this research study selected from 7 postsecondary institutional campuses in Ontario.⁵ A targeted institutional approach was used to ensure that 2/5th of postsecondary student respondents were self-identified francophone youth (less than 25 years of age), 1/5th were self-identified francophone adult learners (25 years+), 1/5th were self-identified francophone international students (on a student visas), and 1/5th were self-identified francophone newcomer learners.⁶ All students needed to be currently registered in a postsecondary program within each targeted educational institution.

Each institutional campus was visited by at least one French-speaking interviewer between February 22, 2017 and March 1, 2017. Interviews lasted between 20-30 minutes per participants to ensure full coverage of the interview guide. Participants were provided with a \$20 honorarium for their participation in the research study.

Representational targets, including a balance of male and female perspectives by institution type were met once the six postsecondary students who attended a focus group in Ottawa were included in the postsecondary student sample. The postsecondary student interview and focus group guide were the same in order to ensure consistency across data collection

³ 30 key informant interviews total, including 8 CSW Ontario focus group participants described in section 4.4.

⁴ Technical Appendix is under separate cover.

⁵ Postsecondary institutions were selected based on the high proportion of self-identified francophone students enrolled at College Boréal, Glendon, La Cité collégiale, Laurentien University, Ryerson University, University of Ottawa, and University of Toronto.

⁶ Newcomer learners immigrated from another country less than 5 years ago.

modalities. See the Technical Appendix for the postsecondary interview and focus group guide.

2.4 Focus Groups

Malatest conducted two focus groups: one with postsecondary students currently enrolled in a bilingual university or French college in the Ottawa area (n=6); the other with francophone community stakeholders in Toronto including francophone community organizations, service providers, advocacy groups and educational institutions (n=8).

Postsecondary students were recruited through social media advertisements published on Malatest's website and Facebook page, and the Regroupement étudiants franco-ontarien (RÉFO) Facebook page.⁷ Social media recruitment advertisements included a 1-800 number for interested students to call to qualify for inclusion in the research study. Students were prescreened for eligibility, and were then recruited based on the selection target criteria described in section 4.3. Ten participants were selected to participate in a 90 minute focus group at Malatest's Ottawa office. Two participants dropped out last minute and could not be replaced in time, and two participants did not show up. A total of six postsecondary students attended the focus group. Participants were compensated with a \$50 honorarium for their participation. See the Technical Appendix for the postsecondary interview and focus group guide.

Eight francophone community member stakeholders preferred to participate in a focus group in Malatest's Toronto office. Participants were sent the interview guide upon confirmation of the focus group in order to consider their responses to questions in advance. The focus group was intended to last 90 minutes, but participants elected to stay for two hours. See the Technical Appendix for the interview and focus group guides for francophone community member stakeholders.⁸

2.5 Employer's Survey

Employers in CSW Ontario were invited to participate in a survey to better understand their workforces. The employer's survey was developed to take approximately 10 minutes to complete. The draft questionnaire was validated with two employers and one placement agency, programmed for online administration, and tested for online self-completion. Employers were contacted by phone and offered the opportunity to fill out the survey online or by telephone.

The survey was accessible online between January 2017, and February 2017. Overall, 500 employers completed the survey after removing employers who did not qualify for the

⁷ Few students recruited through social media met the eligibility criteria for the study. Only one group of postsecondary students met recruitment criteria in the Ottawa location.

⁸ Technical Appendix is under separate cover.

study, representing a response rate of 41%.⁹ Employer survey findings have a margin of error of 4.4% at the 95% confidence level. See the Technical Appendix for the CSW Ontario employer survey. The following tables (Table 2-2, Table 2-3, and Table 2-4) provide summary statistics about the employers participating in the survey. Due to the small sample size of the employer survey the database was only weighted by firm size, not industry.

Table 2-3 compares employer characteristics of our sample to that of all employers in Ontario found in the CANSIM database. Limited sample size of the employer survey prohibited the analysis of findings at the industry level. However, the random sample of employers obtained by the CSW Ontario employer survey included feedback from the vast majority of industries. The distribution of employers by industry was similar to that of the province of Ontario with some industries under and over-reported. Our sample under-represented the professional, scientific and technical services industry (8.4% of employers in the CSW Ontario employer survey vs. 14.0% of employers in Ontario) compared to the province. This industry may have a higher demand for FSPSGs than other industries in CSW Ontario due to the greater need for communication and collaboration conducted by the industry.

Table 2-2: Employers Participating in Employer Survey by Firm Size

| Firm Size | Percent of Firms |
|-----------------------------|------------------|
| Micro 1 to 4 Employees | 48.8% |
| Small 5 to 99 Employees | 47.0% |
| Medium 100 to 499 Employees | 3.4% |
| Large 500 and Over | 0.8% |
| Total | 100.0% |

Source: CSW Ontario employer survey, (2017)

⁹ As calculated using the MRIA formula (industry standard).

Table 2-3: Employers Participating in Employer Survey by Industry

| Firm Industry | Percent of Firms (CSW Ontario Employer Survey) | Percent of Firms (CANSIM) |
|--|---|--|
| 11 Agriculture, forestry, fishing and hunting | 1.2% | 2.0% |
| 21 Mining, quarrying, and oil and gas extraction | 0.0% | 0.2% |
| 22 Utilities | 0.2% | 0.1% |
| 23 Construction | 6.8% | 10.9% |
| 31-33 Manufacturing | 5.4% | 4.8% |
| 41 Wholesale trade | 5.0% | 5.2% |
| 44-45 Retail trade | 19.0% | 12.2% |
| 48-49 Transportation and warehousing | 1.4% | 6.4% |
| 51 Information and cultural industries | 1.2% | 1.5% |
| 52 Finance and insurance | 5.4% | 4.0% |
| 53 Real estate and rental and leasing | 5.4% | 4.4% |
| 54 Professional, scientific and technical services | 8.4% | 14.0% |
| 55 Management of companies and enterprises | 0.0% | 0.5% |
| 56 Administrative and support, waste management and remediation services | 5.6% | 4.6% |
| 61 Educational services | 3.0% | 1.3% |
| 62 Health care and social assistance | 12.2% | 10.0% |
| 71 Arts, entertainment and recreation | 3.0% | 1.4% |
| 72 Accommodation and food services | 5.6% | 7.0% |
| 81 Other services (except public administration) | 10.6% | 9.1% |
| 91 Public administration | 0.6% | 0.3% |
| Total | 100.0% | 100.0% |

Source: CSW Ontario employer survey (2017)

Table 2-4: Employers Participating in Employer Survey by Percent of Employees that Speak French

| Percent of Employees that Speak French | Percent of Firms |
|--|------------------|
| 0% of employees | 66.6% |
| 1 to 9% of employees | 11.8% |
| 10 to 19% of employees | 5.7% |
| 20 to 29% of employees | 3.1% |
| 30 to 39% of employees | 2.9% |
| 40 to 49% of employees | 0.9% |
| 50% of employees | 2.3% |
| 100% of employees | 1.9% |
| Total | 95.3% |
| Don't know/Prefer not to say | 4.7% |
| Grand Total | 100.0% |

Source: CSW Ontario employer survey (2017)

2.6 Student Survey

A bilingual survey was designed to be administered in-person or online (depending on school board preference) to grade 11 and 12 students attending FSB and ESB in CSW Ontario (see Technical Appendix for the survey).¹⁰ ESB students who participated in this study were enrolled in French Immersion or Extended French programs. Each school board had different research ethics timelines, requirements (e.g. research blackout dates, approval gatekeepers and processes), regardless of the presence of a formal research ethics application. This variability prohibited the ability of the contractor to collect a random sample of secondary students in CSW Ontario.

All four public ESB were able to process and approve the research project within the Ministry's timelines, but each school board approved different implementation processes and modalities that constrained data collection processes within the tight timelines required by the Ministry. Two out of the three FSB were able to assess and approve the research project, with one FSB unable to assess the research application within the Ministry's study timelines. As a result, one FSB was excluded from this research study. Research ethics approvals from English and French school boards were contingent on voluntary participation by the school administration, faculty and students. As a result, it is unknown how many students were invited to participate, and what the net response rate was.

¹⁰ Technical Appendix is under separate cover.

Overall, 854 students completed the survey out of nearly 6,000 students in the area, representing a gross response rate of 14%.¹¹ The response rate by school board is detailed in the following table: Table 2-5.

Table 2-5: Secondary Student Survey Response Rates

| School board | Respondents | Grade 11 & 12 Students | Gross Response rate |
|--|-------------|------------------------|---------------------|
| Conseil scolaire Viamonde (FSB) | 110 | 556 | 20% |
| Durham district school board (ESB) | 141 | 1,048 | 13% |
| Halton district school board (ESB) | 138 | 1,062 | 13% |
| Toronto district school board (ESB) | 164 | 9,69 ¹² | 17% |
| Conseil scolaire de district catholique Centre-Sud (FSB) | 277 | 1,422 | 20% |
| Peel district school board (ESB) ¹³ | 24 | 936 | 3% |
| Total | 854 | 5,993 | 14% |

Student characteristics by school board resulted in a slight overrepresentation of female perspectives. Statistically significant differences between FSB and ESB students were observed. FSB students were more likely to be born outside of Canada compared to their ESB student counterparts. However, ESB students were more likely to report immediate family members being born outside of Canada. Differences in language identity between the secondary student samples were also observed. FSB students were 10% more likely to identify as Francophone (11% versus 1%) and Francophone and Anglophone (55% versus 20%). ESB students were more likely to identify as Anglophone (27% versus 2%) and multilingual (50% versus 32%). Student characteristics confirm the complex linguistic identities of both FSB and ESB students.

¹¹ Response rate for the English School Board was 12%, whereas the response rate for the two participating French School Boards was 20%. English catholic school boards were excluded from this study due to time constraints.

¹² TDSB did not have 2016-2017 grade 11 & 12 enrollment numbers at the time of this study. Response rate is calculated based on 2015 student enrollment.

¹³ Peel District School Board required recent original vulnerable sector screening forms for researchers entering schools to administer the student survey. This step created additional time constraints for data collection within the Ministry's research timelines, and resulted in few completed student surveys.

Table 2-6: Secondary Student Survey Characteristics

| Students Characteristics | French SB | English SB |
|----------------------------|------------|------------|
| Gender | | |
| Female students | 54% | 60% |
| Male Students | 41% | 37% |
| Other | 1% | 1% |
| Born outside Canada | | |
| Born outside Canada | 23% | 16% |
| Family born outside Canada | 30% | 41% |
| Language identity | | |
| Francophone | 11% | 1% |
| Francophone and Anglophone | 55% | 20% |
| Anglophone | 2% | 27% |
| Multilingual | 32% | 50% |
| Total | 387 | 467 |

Source: Secondary student survey, Question 1-2, 6 (2017)

2.7 Market Analysis

The market analysis was conducted using multiple data sources, including secondary data sources. Statistics Canada's Labour Force Survey provided data on the proportion of Ontario's workforce that are postsecondary graduates (PSGs).¹⁴ Population projections to 2030 by age for CSW Ontario were obtained from the Ontario Ministry of Finance's Ontario population projection.¹⁵ Current levels of youth enrolled in French-language secondary school programs were obtained from Statistics Canada's Elementary-Secondary Education Survey.¹⁶ Postsecondary enrolment figures for adult learners were obtained from Statistics Canada's Postsecondary Student Information System.¹⁷ Counts of foreign students studying in Canada were obtained from Immigration, Refugees and Citizenship Canada data available through the Open Government portal.¹⁸

The majority of these data sources were unable to provide estimates for CSW Ontario. As a result in the absence of data specific to CSW Ontario, estimates for Ontario were used but

¹⁴ PSGs were defined as those who have obtained a postsecondary certificate or diploma, or a university degree.

¹⁵ CSW Ontario is defined in the Ministry of Finance's dataset as those residing Central Ontario, Southwestern Ontario, and Greater Toronto area.

¹⁶ Statistics Canada . Tables 477-0025 and 477-0027.

¹⁷ Statistics Canada. Table 477-0033. Adult learners were defined as those 25 years of age and older; enrolled in a career, technical or professional training program or Undergraduate program; and pursuing any type of credential.

¹⁸ Immigration, Refugees and Citizenship Canada. Study permit holders by Province/Territory and Citizenship. (database). (accessed: March 19, 2017)

scaled to that of the population in CSW Ontario. This was deemed sufficiently accurate as CSW Ontario accounts for 81.2% of Ontario's population.¹⁹

With these external sources, the data from the two surveys could be extrapolated to understand market demand for a French-language postsecondary institution. Ontario secondary student interest in a French-language postsecondary education was obtained from a survey of students in CSW Ontario. The CSW Ontario Employer survey provided insight into proportion of their workforce that are PSGs and the portion of their postsecondary graduates that are French speaking (a.k.a. French-speaking PSGs or FSPSGs). In addition, a separate analysis for the Government of Canada based on their demand for students who were bilingual or in French only positions in Ontario. Employers were asked about their future demand for FSPSGs in 2020 and in 2030.²⁰

2.8 Synthesizing Lines of Evidence

Once collection was complete, the Consultant cleaned the quantitative data and compiled it into a SPSS database for analysis. Key informant interviews were analyzed thematically to respond to research questions. The overall synthesis of the various lines of evidence was reviewed to determine their level of alignment, with greater confidence and emphasis assigned to findings where all lines of evidence align. For instance, areas where qualitative data converge with quantitative results will be given greater weight than areas where the data sources diverge. Qualitative data was used to contextualize the perceived level of need for a French-language university based on the labour market analysis from multiple stakeholder perspectives using QSR Nvivo 11 Pro.

¹⁹ Source: Ministry of Finance Information Centre. Ontario Population Projections Update, 2015-2041. Spring 2016.

²⁰ For details regarding the market analysis, see Technical Appendix under separate cover.

SECTION 3: Strengths and Limitations of the Research

All studies have a number of strengths and limitations to be taken into consideration when reviewing findings. The strength of this study lies in the comprehensive consultation approach that was used to triangulate six stakeholder perspectives for a French-language university. This study is the first to empirically estimate the current number of French-speaking postsecondary graduates from a representative sample of employers in CSW Ontario. The report uses primary and secondary data to project student demand for a French-language postsecondary institution from 2017 to 2030. Two scenarios are employed in the student demand projection; a conservative base case scenario, and a high enrollment scenario. The study also projects CSW Ontario employer demand for French-language postsecondary graduates using primary and secondary data sources. It is similarly the first study to consult self-identified francophone postsecondary students in different postsecondary institutions to identify their interest, need, and expectations of a French-language university in CSW Ontario. Further, this study situates the degree of alignment of both quantitative and qualitative information with other relevant studies on this topic.

A number of limitations should be kept in mind when considering the review's findings, including:

Student survey representativeness & response bias: Data from 11th and 12th grade student survey should be interpreted with caution. Voluntary staff and student participation in studies approved by research ethics boards across Ontario limit the ability of researchers to draw a representative sample of students for inclusion in education-based research studies. Further, variability in approved research processes and modalities lead to non-standardized research approaches that may have also affected student responses. As a result, non-response bias for this study is unknown. Students were able to skip questions they did not want to answer resulting in different total number of students listed in each summary table found in section 4.1. While it is understandable and expected that not every student would answer every question, there is no way to assess the degree to respondents and non-respondents were different from one another. Further, the tight timeframe from which to conduct this research study resulted in an overrepresentation of urban students living in the Greater Toronto Area, and an underrepresentation of students attending French school boards.

Misunderstanding of questions: The student survey was self-administered. Where question terminology was open to interpretation, there may have been inconsistencies in student interpretation. Efforts were made to mitigate this when the survey was administered in person by including more detailed explanations and definitions before students could start the survey. Noteworthy is the lack of known impact of **not** having an existing French-language university in CSW Ontario on student's existing institutional preference. Students may have responded to this question with the current postsecondary institutions as their only frame of reference on institutional preferences. Further, findings from the student survey reveal complex relationships between factors (indicators) that

influence enrollment in postsecondary institutions. Qualitative methodologies would be ideally suited to untangle the relationships in future research on this topic.

Limited employer sample: While the employer survey represented a random sample of employers in the CSW Ontario, the sample size of 500 employers limited the ability to examine demand for French-speaking employees by sector or industry. Further, in order to keep the survey under 10 minutes long, the consultant did not ask employers the level of French proficiency required by French-speaking employees to function optimally in their workforce.

Unknown capacity of French-language postsecondary network to produce French-speaking postsecondary graduates: There is an unknown capacity of the existing French-language postsecondary network to produce French-speaking postsecondary graduates. Information about postsecondary French-language programs, and student enrolment in French-language programs were unavailable. As a result, this study examined the student demand for a French-speaking postsecondary institution, and employers' demand for graduates from a French-speaking postsecondary institution. This study makes assumptions about the availability and quality of a French-language education at current postsecondary institutions that offer French-language programming. The quality of French-speaking postsecondary graduates within existing French-language postsecondary network is unknown. Employers provided feedback on their demand for French-speaking postsecondary graduates and the relative difficulty they face in targeting FSPSGs in their hiring practice. More research is required to inventory French-language program capacity across Ontario.

Postsecondary student data: Data from postsecondary students was qualitative and based on a relatively small sample of participant. As a result, this study is not meant to be generalizable to the postsecondary student population in CSW Ontario. Rather, the study attempted to reach a purposeful sample of postsecondary students from different type of PSE institutions representing youth, adult learners, international students, and newcomer learners. While our results were not meant to be generalizable they are highly credible given the in-depth treatment of research questions by the research team that was validated in both individual key informant interviews and the focus group modality.

SECTION 4: Findings

Where possible and relevant, findings from five lines of evidence were juxtaposed in order to identify areas of alignment and misalignment for each research question. Overall, significant differences between ESB and FSB secondary student responses were found for most research questions. Alignment between secondary students and postsecondary students were similarly limited suggesting the need for future studies to examine the capacity of existing French-language postsecondary network to meet the needs (both in terms of quality and access to French-language education) of students. Findings from key informants strongly aligned with responses from postsecondary students attending different institutions in CSW Ontario and Ottawa, reflecting perhaps a more credible portrayal of student need and interest based on lived experience. The alignment of study findings with other recent research studies is similarly limited due to methodological approaches that did not consider multiple feeder markets for a French-language university.

4.1 Level of Student Interest in a French-Language University in CSW Ontario

Measuring the level of student interest in a non-existent French-language university is a complex task. This study looked at the dynamic interplay between student preferences (Section 4.1.1), student current intentions (Section 4.1.4), and student likelihood for attending a French-language PSE institution if barriers such as distance and cost were removed (Section 4.1.4). We also looked at the most influential factors considered by secondary students when deciding whether or not to pursue a postsecondary degree (Section 4.1.1). Secondary student responses from English and French-language school boards are reported separately in order to respect the significant historical and needs-based differences between these two student populations. Students attending FSB were conceptualized as the primary feeder group for the French-language PSE. As such, responses from secondary students attending FSB were combined with historical population estimates for the base case (conservative) scenario in our labour market projects in Section 4.4.

4.1.1 **Most influential factors considered by secondary students when deciding whether or not to pursue a postsecondary education**

Secondary students were asked to identify the most influential factors they considered when deciding whether or not to pursue a postsecondary education.²¹ Table 4-1 identifies six factors considered *most influential* to student decision-making processes to pursue postsecondary education. Almost two-thirds (64%) of students attending French school board identify their interest for a particular field of study or program as one the most influential factor they consider when deciding whether or not to pursue postsecondary education. Other *most influential* factors include the cost of postsecondary education (37%), language of study (21%), personal development (19%), and parental pressure (9%).

²¹ Six factors were identified by secondary students through an open-ended textbox that were then recoded to dichotomous response categories for each potential influential factor identified by secondary students.

Significant differences in the most influential factors considered when deciding whether or not to pursue PSE were found between FSB and ESB students. FSB students were more likely to report that language of study is one of the *most* influential factors considered when deciding to pursue postsecondary education (21% compared to 5%) compared to ESB counterparts. This significant finding should be interpreted within the context of limited French-language program offerings in Ontario, representing roughly 22% of university programs and 18% of courses offered in college either *partially* or *completely* in French.²² The availability of PSE French-language programs and courses drop to 3% of programs in the Southern region of Ontario, and none in the North-West of the province.²³ These findings confirm that the lack of access to French-language programs and course offerings has a major impact on the weather or not francophone secondary students attending FSBs pursue PSE.

Table 4-1: Most Influential Factors Considered by Secondary Students When Deciding Whether or Not to Pursue Postsecondary Education by School Board

| Influential Factors for Pursuing PSE | French SB (n=348) | English SB (n=429) |
|---|----------------------|-----------------------|
| Interest in a field of study or program | 64% | 78% |
| Cost of postsecondary education | 37% | 52% |
| Perceived availability of career opportunities for individuals with PSE | 27% | 30% |
| Personal development | 26% | 19% |
| Language of study | 21% | 5% |
| Parental pressure | 9% | 8% |

Percent calculated based on a dichotomous grouping of selecting an influential factor versus not selecting the factor.
Source: Secondary student survey, Question 7 (2017)

4.1.2 Student language preference for postsecondary education

Table 4-2 identifies secondary student language preferences for their postsecondary education. Significant differences between students attending a French and English school board exist, demonstrating the need to interpret findings for both groups separately. More than 1 in 10 students (13%) in grade 11 and 12 attending a FSB would prefer attending a French only post-secondary institution. Nearly half of students attending FSB preferred a bilingual institution (49%), 20% preferred an English only institution, 16% did not have a preference, and 3% did not know. These findings demonstrate a consistent cohort of Francophone students preferring a French-language PSE institution. The French only preference is likely underestimated in part due to a lack of existence and/or familiarity with a French-language university in CSW Ontario.²⁴

²² <http://www.refo.ca/gouvernance-universitaire.php>

²³ *ibid*

²⁴ The impact of a lack of FLU frame of reference and/or the potential misinterpretation of the question is unknown. It is possible that students reported a preference for PSE institution that is currently available to them given that a large portion of the sample (namely grade 11 students) were applying to existing PSE institutions at the same time frame of this research study.

Significant differences in language preferences for secondary education were found between those enrolled in French and those enrolled in ESBs. Students enrolled in a FSB were more likely to report a preference for an institution offering programs in French (13% vs. 1%) than did students enrolled in ESBs. Similarly these students were less likely to report a preference for English-language (20% vs. 27%) or bilingual (49% vs. 56%) institutions.

Table 4-2: Secondary Students Language Preference for Postsecondary Education by School Board.

| Language preference | French SB (n=322) | English SB (n=431) |
|-----------------------|----------------------|-----------------------|
| French only | 13% | 1% |
| Bilingual institution | 49% | 56% |
| English only | 20% | 27% |
| No Preference | 16% | 14% |
| Don't Know | 3% | 2% |

Source: Secondary student survey, Question 10 (2017)

Overall findings from Table 4-2 partially align with findings from a study by the Bureau of the Institutional Research and Planning of University of Ottawa titled *Campus Sud-Ouest: Analyse des résultats de l'enquête sur la mobilité étudiante et les préférences*, referred to from here on in this report as the *Campus Sud-Ouest* report (2015).²⁵ This study found that the majority of students (56%) indicated a preference for a bilingual PSE institution, while 18% preferred an English-language institution, and 8% preferred a French-language institution.²⁶ Student preferences from the *Campus Sud-Ouest* report (2015) reveal a difference of 5% in French-only institutions compared to our study. Further, the *Campus Sud-Ouest* report did not consider the impact of students who had “no preference”²⁷ on the potential student demand for French only PSE, nor consider the secondary feeder market of students attending ESB who would prefer to a French postsecondary institution. Section 4.4.1.1 of this report estimates the proportion of student preference for French-only postsecondary institution by school board type to inform the base case scenario projections for a French-language university.

Findings from postsecondary student interviews add context to the secondary student survey findings (see Table 4-3 below). While postsecondary student interviews are not to be mistaken as generalizable to the postsecondary student population, they do illustrate a

²⁵ While there is partial alignment of findings, there is a lack of alignment in the way the estimates are interpreted and the conclusions that are drawn in the report. Further, the *Campus Sud-Ouest* report does not consider international students and adult learners in their estimation of student demand. This will be addressed in greater detail in Section 6.4 of the report.

²⁶ Recherche Institutionnelle et planification, Université d'Ottawa, *Campus Sud-Ouest: Analyse des résultats de l'enquête sur la mobilité étudiante et les préférences*, 26 Juin 2015, p. 13

²⁷ Authors of *Campus Sud-Ouest* reported 14% of students having no preference for a French-language university and 16% having no preference for a French-language college without interpreting the impact these estimates would have on the potential student demand for French only PSE.

tension in our lines of evidence that should be explored in future research as it has not been addressed in any other research study to date. Two-thirds of postsecondary students (67%) interviewed reported a preference for attending a French-language university in CSW Ontario. Roughly half of the French-speaking postsecondary students attending English and bilingual universities would consider switching to a French-language university or doing a second degree at a French-language university in CSW Ontario. All postsecondary students attending a French-language university outside of CSW Ontario, and a French College in CSW Ontario and Ottawa would prefer attending a French-language university in Ontario.²⁸

Table 4-3: Postsecondary Student Language Preference for University by Current Postsecondary Institution and Gender.

| Students who would prefer to go to a French-language university in Central Southwestern Ontario by type of postsecondary institution | All students (n=37) | Female students (n=19) | Male students (n=18) |
|--|---------------------|------------------------|----------------------|
| English University | 5 | 2 | 3 |
| Bilingual University | 11 | 4 | 7 |
| French University | 1 | | 1 |
| French College in CSW Ontario | 10 | 6 | 4 |
| French College in Ottawa | 10 | 7 | 3 |

Source: Postsecondary student interview guide (all French-speaking postsecondary students), Question 9 (2017)

Note: Findings from the postsecondary student interviews may not generalizable but are credible

Findings from key informants *slightly* aligned with secondary student findings, and *mostly* aligned with postsecondary student findings that suggest a high degree of preference for French-only postsecondary instruction. Overall key informants perceived a high preference for French only PSE instruction from the youth they were in contact with. Key informants however mentioned being better positioned to discuss the needs of adult learner and newcomer learner educational preferences. Key informants discussed the preference for French only PSE instruction for adult learners and newcomer learner populations.²⁹ The rationale was that newcomer learners were likely to have professional credentials from other countries that needed to be accredited by a French-language university and/or professional body in order to join the skilled labour force in Ontario. The credibility of this qualitative finding was validated empirically in the market analysis section of this study that positions adult learners (including newcomer learners) and international students as significant student populations for a French-language university in CSW Ontario.

²⁸ The qualitative findings in this section informed market labour assumptions for the FLU. Based on these qualitative findings, the consultant included conservative provisions for postsecondary student transfers to the FLU within the first three years of operation. For details see Section 4.4 of the report.

²⁹ Adult learners and newcomers make up 1/3rd to 1/2 (30.4% to 47.2%) of the pool of students for a French-language postsecondary institution.

4.1.3 Factors influencing student language preferences

Table 4-4 identifies the most common factors influencing students preferred language of instruction. Significant differences between students attending a French and English school board exist, demonstrating the need to interpret findings for both groups separately. More than 9 in 10 grade 11 and 12 students attending FSBs reported that their PSE language preference was influenced by their desire for improved labour market outcomes (93%) and their desire to maintain their bilingual capabilities (90%). Other factors that influenced their PSE language preference included learning better in their selected language (84%), their desire to augment their abilities in a language other than their mother tongue (69%), the perception that it would be easier for them (55%), their parent's influence (32%), and other reasons (3%).

Table 4-4: Factor Influencing Secondary Student Language Preference by School Board.

| Language preference reflects: | French SB (n=319) | English SB (n=417) |
|---|----------------------|-----------------------|
| That it will bring me improved labour market outcomes | 93% | 89% |
| That I learn better in that language | 84% | 85% |
| My desire to maintain my bilingual capacities | 90% | 82% |
| My desire to augment my abilities in a language other than my mother tongue | 69% | 73% |
| That it will be easier for me | 55% | 65% |
| My parents' own preference | 32% | 24% |
| Other reason | 3% | 3% |

Source: Secondary student survey, Question 11 with dichotomized response options (2017) (n=736)

Findings from postsecondary student interviews strongly align with those represented in Table 4-4. The most commonly cited factor influencing postsecondary students' language preference was the belief that their preferred language would improve their labour market outcomes. Postsecondary students largely mentioned needing "an edge" to find work in their chosen field of study or occupation. Most postsecondary students expressed that their edge was their bilingualism, and a central influential factor when selecting their learning institution from among the available institutional options at the time.

When postsecondary students were asked if they would have gone to a French-language university in CSW Ontario had it been available to them, many respondents would not answer in the hypothetical given the absence of a French-language university option in CSW Ontario at the time. A third of PSS interviewed mentioned having looked into attending a French-language university in Quebec, but decided against it for one of more of the following reasons: 1) the cost of traveling out of province; 2) student motivations for building or maintaining their bilingualism and the perceived adverse effects of an all-French environment on their professional development; and, 3) the lack of perceived labour force

opportunities in Quebec compared to Ontario where they would eventually want to join the workforce.

Nearly half of our postsecondary French-speaking student sample attending an English or bilingual university would prefer to go to a French-language university, and our entire postsecondary sample attending bilingual college institutions or French-language postsecondary institutions (all levels) would prefer to attend a French-language university if it were available in CSW Ontario. Most students believed that a French-language university would improve their labour market competitiveness and outcomes (67%). The bilingualism they thought would be gained by attending English or bilingual university was called into question when most respondents (80%) expressed a fear of losing their French-language capabilities in what they described was an English-based academic environment.

When asked why bilingual PSE institutions felt like English-based environments, students identified: 1) the lack of available core and elective course offerings in French that reinforced student perception that French-language instruction was not as important as English-language instruction; 2) the use of English-language textbooks and resources in French-language course delivery reinforced English elitism; and, 3) the dominance of English-language in public spaces on campus served to isolate or assimilate French-speaking students. Further, students identified the economic impact the perceived English-based environment would have on their labour market outcomes. The impacts students described include: 1) adding at least two years to the length of a four year program in contexts where core and elective courses are not available in French or on French campuses; 2) nearly doubling the cost of PSE; 3) a limited appropriation of course knowledge and/or skills that are taught in English rather than French; and, 4) compromised employment prospects resulting in gaps in student knowledge when competing with other candidates for skilled jobs.

"I feel misled by my university. No one tells you that your core courses are not available in French on a regular basis. No one tells you that the course materials are mostly in English even when the course is taught in French. This should not be allowed."

"Lorsque le professeur attribue une lecture en anglais, je ne la fais pas. Je risque d'échouer. Je suis allé voir l'enseignant et j'ai demandé des documents en français, mais il ne me les donne pas. Je fais le meilleur possible avec le contenu que je comprends. J'ai des grosses lacunes dans ma compréhension. Ça me fâche parce que ça coûte cher. Cela va nuire à mon employabilité."

Respondent 1: *"The English and French people don't interact [in a bilingual institution]. It was very isolating experience for me and others like me. Right? [asking others]"*

Respondent 2: *"Yes, I feel the same way. It is hard for me to feel a part of this institution, like I belong and that I matter. For example there were six students registered for a core class in my program, two were English and four were French-speaking students. The university required that the course be taught in English to accommodate the two English students rather than the four French-speaking students. That is so insulting."*

[Others agree and nod their heads]

Respondent 3: *"It is false publicity that it is a bilingual university. You have no choice but to take classes in English if you intend to finish your degree in a reasonable amount of time. It takes at least 6 years rather than*

4 years of schools because of the core course offerings are not available in French. It is not bilingual despite its advertising.”

Key informant findings strongly align with secondary and postsecondary factors that influence language preferences.

4.1.4 Secondary student intention to pursue postsecondary education in French

Table 4-5 identifies secondary students’ intention to pursue postsecondary education in French. Significant differences between students attending a French and ESB exist, demonstrating the need to interpret findings for both groups separately. Students attending FSBs were roughly evenly distributed between low (36%), moderate (31%) and high (33%) likelihood of pursuing a PSE in French. If distance and cost were removed from consideration, the likelihood of students attending PSE in French increased by over 10%.³⁰ Almost one quarter (22%) of students attending ESBs reported a high likelihood of attending a PSE in French. If distance and cost were removed from consideration, the likelihood of these students attending PSE in French increased to 34%. These estimates suggest that *student preferences* for PSE institutions reported in Table 4-5, and their *intentions to attend* PSE institutions are fundamentally different. Student preferences in this study significantly underestimate student intention to attend a French-language postsecondary institution, calling into question the sensitivity of research studies that calculate market demand for a French-language university based largely on student preference.

Table 4-5: Secondary Student Intention to Pursue Postsecondary Education in French by School Board.

| Likelihood of pursuing a postsecondary education in French | Likelihood to pursue PSE in French | | Intention to pursue PSE in French if distance and cost were not factors | |
|--|------------------------------------|--------------------|---|--------------------|
| | French SB (n=316) | English SB (n=421) | French SB (n=314) | English SB (n=418) |
| Low (30% or less) | 36% | 48% | 23% | 40% |
| Moderate (40-60%) | 31% | 30% | 32% | 23% |
| High (70% or higher) | 33% | 22% | 46% | 34% |

Source: Secondary student survey, Question 12 and 13 (2017) (n=737 and n=732, respectively)

4.1.5 Factors that influence student decisions to undertake PSE in French

Table 4-6 identifies factors that affect secondary students’ decision to undertake PSE in French. Significant differences between students attending a French and ESBs exist, demonstrating the need to interpret findings for both groups separately.³¹ The factors that most influence FSB student’s decision to undertake PSE in French include: 1) the lack of desired courses available in French (59%); 2) the program’s lack of reputation (56%); 3) the

³⁰ 46% of students attending French school boards reported a high likelihood of attending PSE in French if travel and cost were not a factor.

³¹ Each response option was coded as a dichotomous variable.

lack of established reputation of a French-language university or college (55%); and, 4) the high cost of living associated with moving to a location where there is a French postsecondary institution (48%).³² In contrast, the factors that most influence ESB student's decision to undertake PSE in French include: 1) the lack of desired courses available in French (67%); 2) the high cost of living associated with moving to a location where there is a French postsecondary institution (62%); 3) insecurity in expressing themselves verbally/writing in French (57%); and, 4) the distance to get to a francophone institution (50%).³³

While the factors that most influence FSB and ESB students are different, there is still significant overlap in three factors. The main factors affecting all secondary students include: 1) the lack of desired courses available in French, 2) the high cost of living associated with moving to a location where there is a French postsecondary institution, and 3) the distance to get to a francophone institution. Noteworthy is the distinction between FSB and ESB student perceptions on market demand for French-language skills in the workforce. Two fifths of FSB students felt as though there is a lack of employer demand for French-language skills (38%) compared to nearly half of the ESB students (47%). A potential contradiction exists in the perception of ESB students who perceived low level of employer demand for French-language skills (47%). These ESB students reported a preference for PSE education with French-language access (57% of ESB students prefer French-only or bilingual PSE institution) for the purpose of improving their labour market outcomes (89%) and maintaining their bilingual capabilities (82%). Untangling the complex relationships of factors/indicators affecting enrollment in postsecondary institutions (including perceived labour market outcomes) would be ideally explored using qualitative methodologies in future research with secondary students.

Interestingly, low interest in French education among students (33% for FSB versus 46% for ESB students) and low intention of pursuing a postsecondary education in French (36% for FSB versus 48% for ESB students)³⁴ were consistent. This finding suggests that secondary student preferences for PSE institution underestimate the proportion of students intending or likely to pursue PSE in French. This finding needs to be taken into consideration when reviewing other reports such as the *Campus Sud-Ouest* report (2015) that builds its market demand projections on self-reported student preference indicators. Further, this finding supports the benefit of producing multiple scenarios depicting a base case (conservative) and a high demand case for student enrollment projections for PSE.

³² The distance to get to a francophone institution is similarly 48%.

³³ Versus the shorter distance to get to Anglophone institutions.

³⁴ Please see Table 4-5.

Table 4-6: Factors That Affect Student Decision to Undertake Postsecondary Education in French by School Board.

| Factors that affect student decision to undertake postsecondary education in French | French SB (n=314) | English SB (n=418) |
|---|-------------------|--------------------|
| The lack of desired courses available in French | 59% | 67% |
| High cost of living | 48% | 62% |
| The program's lack of reputation | 56% | 49% |
| The lack of established reputation of a French-language university or college | 55% | 48% |
| The distance to get to a francophone institution | 48% | 50% |
| Insecurity in expressing verbally/writing in French | 29% | 57% |
| The lack of public transportation | 40% | 45% |
| A perceived lack of job market demand for French language skills | 38% | 47% |
| Low marks in French | 30% | 50% |
| The lack of scholarships for individuals studying in French | 38% | 45% |
| Low interest in French education | 33% | 46% |
| The lack of internships | 38% | 38% |
| The lack of diversity of the student population (e.g., ethnicity, LGBTQ+) | 22% | 27% |
| Other | 1% | 2% |

Source: Secondary student survey, Question 14 (2017) (n=732)

Findings from postsecondary student interviews moderately align with the items listed in Table 4-6. Postsecondary students were not asked to provide feedback on this exhaustive list, and did not identify with: 1) a low interest in French education; 2) a lack of perceived job market demand for French language skills; 3) insecurity in expressing verbally/writing in French; and 4) low marks in French (see section 4.1.3 for key findings on postsecondary language preference for PSE). Further, postsecondary students were able to expand on these findings by providing insight on the essential elements for a French-language university (see section 4.1.3 for details) and preferred ways to differentiate and market the French-language university (see section 4.3.3 for details).

ESB student perceptions of employer demand is somewhat aligned with employer's demand for employees with French-language capabilities. According to our employer survey, less than 5% of postsecondary graduates in the CSW Ontario workforce speak French. Half of the employers surveyed did not see a value or benefit to having bilingual or French-speaking employees in their workforce (49%).³⁵ The most common benefit perceived by employers is having an employee that is able to interact with customers and clients (43%).³⁶

The paucity of research on factors or obstacles that affect student decision to undertake PSE in French limit the possible alignment of this study to studies. The relevant research

³⁵ Source: Employer Survey, Question 12 (2017), See Technical Appendix Table 4-22 for additional details.

³⁶ Ibid.

studies identified for comparisons to this study included limited information on data collection tools and sampling making it hard to situate findings from this report to others. Allard et al.'s study (2011) reported four obstacles to pursuing PSE in French. While these four obstacles are examined in our study in Table 4-6, only one was identified as a top factor that affects student decision to undertake PSE in French. This factor is the distance to get to a francophone institution versus the shorter distance to get to an Anglophone institution. Allard et al.'s top obstacles included: 1) a preference for studies in English which is not aligned to the findings in our study; 2) low grades in French which is not a major factor for FSB students and only a factor for half of ESB students; 3) the distance from home to a French-language post-secondary institution already discussed as aligned with our study; and 4) the lack of financing and the small number of post-secondary scholarships in French which is not a major factor affecting students in our study. Two out of the five factors identified in the *Campus Sud-Ouest* (2015) study aligned with our findings for FSB students, namely the lack of program reputation (70%) and the lack of reputation for a French-language university or college (69%) compared to the elite English universities and colleges in CSW Ontario.

4.1.6 Preferred postsecondary program pathways

Three quarters of secondary students intended to pursue a bachelor's degree through a university as their *first choice* program pathway (76%).³⁷ Other *first choice* program pathways represented less than 5% of secondary student intentions, and 6% of the secondary student sample did not know which program pathway they preferred. *Second choice* program pathways illustrated a larger distribution of response options in our sample. The most popular *Second Choice* program pathway identified by secondary students was a mix of college and university courses that result in a bachelor's degree and possibly a diploma (36%), followed by a four-year bachelor's degree offered through a college (35%). Few secondary students selected other response options, and 9% of students selected apprenticeship or trade as their *Second Choice* option.

Students from ESBs were more likely to report intentions to pursue a four-year bachelor's degree offered through a university than students enrolled in a FSB (82% vs. 69%). Further, students from FSB were more likely to report intentions to pursue an apprenticeship or a trade as a *Second Choice* (15% vs. 5%) compared to their ESB counterparts.

Results on program pathway moderately align with the results of the *Campus Sud-Ouest* (2015) despite the use of different questions and response options. Both findings reveal that the majority (80%) of secondary students intend to go to university, whether it is a program that includes a mix of college and university course or a bachelor's degree. We report a smaller proportion of students who intend to go to college (4% as a *First Choice* option, and 35% as a *Second Choice option*) compared to the *Campus Sud-Ouest* finding of

³⁷ Response to Question 8 in Secondary student survey (2017).

12% of students who intend to go to college only.³⁸ The *Campus Sud-Ouest* study does not have the added specificity of examining a second choice pathway.

Postsecondary student preferred program options and key informants perception of preferred program options mostly align with results from the secondary student surveys. All lines of evidence support a four year university degree as the preferred program pathway. A contextualized understanding of a mixed college university degrees and complementary diplomas were similarly very popular with postsecondary students who valued applied work experience prior to graduation or as a means into the labour force.

4.1.7 Preferred postsecondary program options

Table 4-7 identifies secondary student preferences for postsecondary education program options. There are no significant differences between FSB and ESB students. As seen from Table 4-7, the top four *First Choice* program options for FSB students include: 1) science and math (19%); 2) health science (17%); 3) social science (16%), and, 4) Business/Commerce/Management (11%).³⁹ The top *Second Choice* program options for FSB students include: 1) social science (15%); 2) arts and humanities (15%); 3) science and math (12%); and 4) health science (12%).

Table 4-7: Secondary Students Preference for Postsecondary Education Programs.

| Program Options | French SB (n=323) | | English SB (n=433) | |
|---|---------------------------|---------------------------|---------------------------|---------------------------|
| | 1 st Choice | 2 nd Choice | 1 st Choice | 2 nd Choice |
| Arts and Humanities | 7% | 15% | 4% | 14% |
| Fine Arts and Performing Arts | 6% | 6% | 7% | 4% |
| Health Sciences | 17% | 12% | 14% | 15% |
| Social Sciences | 16% | 15% | 25% | 15% |
| Business/Commerce/Management | 11% | 11% | 14% | 10% |
| Sciences and Math | 19% | 12% | 18% | 19% |
| Computer Science/Information Technology | 3% | 4% | 2% | 5% |
| Education | 4% | 7% | 4% | 8% |
| Engineering / Technology | 9% | 9% | 7% | 8% |
| Specialized Trades | 3% | 5% | 3% | 2% |
| Hospitality, Tourism and Recreation | 2% | 2% | 1% | 1% |
| Other | 4% | 3% | 3% | 1% |

Source: Secondary student survey, Question 9 (2017) (n=754)

³⁸ Recherche Institutionnelle et planification, Université d'Ottawa, Campus sud-ouest: Analyse des résultats de l'enquête sur la mobilité étudiante et les préférences, 26 Juin 2015, p. 11

³⁹ The top four *First Choice* program options for FSB students are the same for ESB students.

Findings from our study moderately align with the *Campus Sud-Ouest* study for PSE program preferences. While their study examined different program options than this study, both studies identified the same top three program options for FSB students wishing to go to university. The top program options identified in the *Campus Sud-Ouest* study included: 1) sciences; 2) science of health; 3) social sciences; 4) medicine; and, 5) art.⁴⁰ The *Campus Sud-Ouest* study did not include the specificity of *Second Choice* response options.⁴¹

Findings from postsecondary students strongly align with secondary student findings. Postsecondary students reported a preference for general undergraduate program options with an emphasis on social science, science and math, arts and humanities, business/commerce/management.

4.1.8 Conclusions

Measuring the level of student interest for French only PSE pathways is complex. Student findings demonstrate a high degree of interest for French PSE programs and courses. Student preferences in this study underestimated student intention to attend a French-language postsecondary institution. FSB and ESB students reported higher intentions of attending a postsecondary institution in French (33% FSB versus 22% ESB) than revealed by student preferences for a French only institution (13% FSB versus 1% ESB). The use of student self-reported language preference for postsecondary market projections reported in other studies likely presented a very conservative estimate of student interest. Further, these estimates are of unknown validity due to a lack of French only PSE pathways (such as a French-language university) currently available and familiar to students.

Language preference for PSE largely reflects student desire to improve their labour market outcomes (93%), and maintain their bilingual capabilities (90%). Factors that influence FSB and ESB student decisions to undertake PSE in French are different. Factors with the most influence on FSB students are the lack of courses available in French (59%), the programs lack of reputation (56%), and the lack of established reputation of a French-language university or college (55%). ESB students are most influenced by the lack of desired courses available in French (67%), the high cost of living associated with moving to a location where there is a French postsecondary institution (62%), and insecurity in expressing themselves verbally/written in French (57%).

Three quarters of secondary students intend to pursue a bachelor's degree through a university as their first choice program pathway (76%). No differences in preferred program options were reported between FSB and ESB students. The top program options included: 1) science and math; 2) health science; 3) social science; and 4) business, commerce, and management.

⁴⁰ Campus sud-ouest: Analyse des résultats de l'enquête sur la mobilité étudiante et les préférences, Recherche Institutionnelle et planification, Université d'Ottawa, 26 Juin 2015, p.18

⁴¹ No other study met the inclusion criteria outlined in section 4.1 of this report for comparative analyses.

Most PSS interviewed reported a preference for attending a French-language university at the undergraduate level and/or pursuing a graduate degree at a French-language university in CSW Ontario. Existing PSE institutions were not described as meeting French student needs.⁴²

4.2 Level of Demand for French-Speaking Postsecondary Graduates (FSPSG)

This section of the report estimates the current level of demand for FSPSG in CSW Ontario (Section 4.2.1), estimates the expected demand for FSPSG in 2020 and 2030 (Section 4.2.2), identifies labour market gaps of FSPSG (Section 4.2.3), explores the degree of difficulty recruiting FSPSG (Section 4.2.4), and explores employers interest in establishing a partnerships with a French-language university. Employer responses were drawn from a random sample of employers in all industries and sectors in CSW Ontario in order to make inferences about businesses in these regions as a whole. Five hundred employers participated in the study, and results were weighted on the basis of firm size. Employer HR directors or business owners were the targeted respondent to participate in the survey due to their informed knowledge and in-depth understanding of their current workforce, and due to their informed visions of the future direction of their companies.

Labour market projections and gaps for FSPSG were estimated based on the employer survey and reliable secondary data sources.⁴³ Not all pertinent secondary data source metrics were available for CSW Ontario and were adjusted to reflect the proportion of the Ontario population that reside in CSW Ontario (namely 81.2% on Ontario).⁴⁴ The 2017 CSW employer survey provided labour market information about the prevalence of FSPSGs in CSW Ontario's workforce. Employers reported that 4.4% of their workforce are French-speaking postsecondary graduates. However, less than one-third (28.7%) of employers reported having French-speaking employees. The low incidence of French-language employees in CSW Ontario is suspected to be due to the large proportion of micro and small employers (<100 employees) in CSW Ontario.

4.2.1 The demand of employers for FSPSG in CSW Ontario

The estimation of demand for FSPSG in CSW Ontario is calculated using data from the 2017 CSW Ontario employer's survey, Statistics Canada labour force survey data, and Ministry of Finance population projections. The estimation begins by obtaining insight into the proportion of CSW Ontario employers' workforce that are FSPSGs. The estimation is then brought within the context of the CSW Ontario's labour market to determine the current workforce. Two estimates are conducted within this section, the first being for the CSW Ontario labour market, the second for the Federal Public Service (FPS). The inclusion of the

⁴² PSS needs and expectations for a FLU are described in greater detail in Section 4.3 of this report.

⁴³ Secondary data sources include: Statistics Canada's Labour Force Survey, Statistics Canada's 2011 Census , and Ontario Ministry of Finance population projection.

⁴⁴ Source: Ministry of Finance Information Centre. Ontario Population Projections Update, 2015-2041. Spring 2016.

FPS in the calculation of demand for FSPSGs is due to the FPS's high demand for FSPSGs and the likelihood of them being an important employer of graduates from a French-language postsecondary institution.

Postsecondary educations play an important role in Ontario's labour force. Two-thirds (65.9%) of Ontario's workforce possesses a postsecondary education.⁴⁵ The Ontario Labour force is also very large, consisting of 7,489,500 individuals in 2016.⁴⁶ Placing these figures into the context of the CSW Ontario labour force results in an estimation that the CSW Ontario labour force consists of 6,078,630 individuals, of which 4,003,804 have a postsecondary education.

Employers in CSW Ontario reported that 5.7% of CSW Ontario's workforce speaks French.⁴⁷ As well, it is estimated that 4.4% of CSW Ontario's workforce are FSPSG, equal to 174,947 FSPSG.⁴⁸ Interestingly, the proportion of FSPSG employed by CSW Ontario businesses is greater than the proportion of individuals that identify French as a mother tongue (1.8%).⁴⁹ This finding suggests that employer's definition of French-speaking may not strictly coincide with an individual being Francophone. As a result, the language proficiency of these individuals is unknown.

While the demand for FSPSGs in Ontario's workforce is estimated at 4.4%, we can assume that the current demand for FSPSG to be unmet as some positions for FSPSG would be vacant. According to the Mercer Report (2017) 6 to 7% of all job postings in Ontario are for FSPSGs. The higher proportion of job postings for FSPSGs does not indicate that the current demand for FSPSGs is 6 to 7% of the CSW Labour Force. The Mercer Report can be used to assume a discrepancy between vacancies of FSPSGs positions and the number of FSPSGs in the workforce. The Ontario job vacancy rate in the third quarter of 2016 was 2.6%.⁵⁰ Assuming that job vacancies are evenly distributed across all types of positions; 2.6% of all FSPSG positions are currently vacant. As a result, it is estimated that due to current vacancies there are 179,617 FSPSG positions in CSW Ontario (174,947 current employees plus 4,670 vacant positions).

⁴⁵ Ibid.

⁴⁶ Source: Statistics Canada. Table 282-0004 - Labour force survey estimates (LFS), by educational attainment, sex and age group, annual (persons unless otherwise noted) (database) (last accessed: April 27, 2017).

⁴⁸ Source: 2017 CSW Ontario employer survey.

⁴⁸ Source: 2017 CSW Ontario employer survey.

⁴⁹ Source: Statistics Canada. 2012. Census Profile. 2011 Census. Statistics Canada Catalogue no. 98-316-XWE. Ottawa. Released October 24, 2012.

⁵⁰ Source: Statistics Canada. Job vacancies, third quarter 2016. Online article available at: <http://www.statcan.gc.ca/daily-quotidien/170125/dq170125a-eng.htm>. Last accessed: May 3, 2017.

An important component of Ontario's FSPSG labour market are those employed by the Federal Public Service (FPS).⁵¹ The FPS is an important employer of bilingual and French-speaking workers. Although the majority of the FPS resides outside of CSW Ontario, it is included in the analysis due to its heavy reliance on French-speaking workers (46.9% of FPS positions are bilingual or French essential).⁵² The FPS's Core Public Administration (Title I and IV) also has a knowledge-intensive workforce with 43.6% of the CPA assumed to have a postsecondary education.⁵³

In Ontario there are 117,660 individuals employed by the FPS.⁵⁴ The majority of these individuals (79,773, or 67.8%) reside within Ontario's portion of the National Capital Region (NCR).⁵⁵ The language requirement of positions within and outside of the NCR widely differ with two-thirds (67.9%) of positions within the NCR tagged as bilingual or French essential, compared to 10.8% in the rest of Ontario.⁵⁶ It is estimated that 58,259 FPS employees in Ontario are French-speaking.⁵⁷ With two-fifths (43.6%) of FPS employees assumed to have a post-secondary education,^{58,59} there are estimated to be 25,401 FSPSGs employed by the FPS in Ontario.

It is estimated that in 2017 there are 204,833 positions for FSPSGs in CSW Ontario and the FPS.⁶⁰ Due to the limitations of the CSW Employers' Survey previously mentioned, specific industries could not be identified as the industries driving the demand behind FSPSGs. However, the Canadian Federal Government (i.e., FPS) was identified as a key employer. The FPS makes up one-eight (12.4%) of FSPSG positions in Ontario.

⁵¹ The FPS includes all employees under Title I, IV and V in the Financial Administration Act. These employees include all active employees of all employment tenures, governor-in-council appointees, deputy ministers and federal judges.

⁵² Source: Government of Canada. Annual Report on Official Languages. Online article available at: <https://www.canada.ca/en/treasury-board-secretariat/services/values-ethics/official-languages/reports/annual-report-official-languages-2014-2015.html>. Last accessed: April 27, 2017.

⁵³ 43.6% of FPS positions are in knowledge-intensive occupations. These occupations are assumed to require a postsecondary education.

⁵⁴ Source: Government of Canada. Population of the Federal Public Service by Geographic Province and Tenure. Online article available at: <https://www.canada.ca/en/treasury-board-secretariat/services/innovation/human-resources-statistics/population-federal-public-service-geographic-province-tenure.html>

⁵⁵ Ibid.

⁵⁶ Source: Government of Canada. Annual Report on Official Languages. Online article available at: <https://www.canada.ca/en/treasury-board-secretariat/services/values-ethics/official-languages/reports/annual-report-official-languages-2014-2015.html>

⁵⁷ Holding positions that are bilingual or French-essential.

⁵⁸ Source: Government of Canada. Demographic Snapshot of the Federal Public Service, 2015. Online article available at: <https://www.canada.ca/en/treasury-board-secretariat/services/innovation/human-resources-statistics/demographic-snapshot-federal-public-service-2015.html>

⁵⁹ The incidence of FPS employees with a postsecondary education is assumed to be evenly distributed across all FPS stratum (i.e., province, language capabilities, and agencies named in Title I, IV and V in the Financial Administration Act).

⁶⁰ There are estimated to be 179,617 FSPSG positions in CSW Ontario, and 25,401 FSPSG positions in the FPS.

While the employer survey could not examine industries driving the demand behind FSPSGs, findings from key informant interviews suggest that employer demand is growing largely for bilingual positions and not uniquely French-speaking positions. Key informants identified the following sectors or occupations most in demand of FSPSGs in CSW Ontario: 1) education (including school boards and daycare centers where French only positions are available); 2) health (including public health and allied health professionals); 3) finance and insurance sector; 4) French commerce; 5) communication/technology sector; 6) public administration (government positions); 7) non-government organizations; 8) management positions; 9) translation positions; and 10) research positions.

Key informant findings are aligned with an analysis of publicly available job postings conducted in the Mercer report (2017) that identified a listing of the top industries with greatest employment demand for Ontario francophone population. While our findings were open-ended and may not be generalizable, five of our categories align with the top industries with the most opportunities for francophone workers identified in the Mercer report (2017), namely: 1) educational services; 2) health care and social assistance; 3) finance and insurance; 4) information; and 5) professional, scientific and technical services.⁶¹

4.2.2 Labour market demand projections for French-speaking postsecondary graduates by 2020 and 2030

This sub-section explores the projected demand for FSPSGs in CSW Ontario between 2017 and 2030. Projections are based off of the estimated demand for FSPSG in 2017 (Please see Section 4.2.1). Projections in the change in workforce composition of FSPSG is based off of reported increased demand by employers in the CSW Ontario Employers' Survey (2017).⁶² As well, projections incorporate changes in population in CSW Ontario based on estimates calculated by the Ontario Ministry of Finance.⁶³

According to the employer survey, the majority of CSW employers (87%) do not expect their demand for FSPSG employees to change between 2016 and 2020. Of those employers that do project an increase in demand for FSPSG, they project an increase in demand by 34% by 2020. As a result of this increase in demand, the proportion of the postsecondary educated workforce is projected to grow from 4.4% to 5.9% by 2020.⁶⁴ This increase in demand for FSPSG employees is being driven by small employers (5 to 99 employees). These employers accounted for the vast majority (80% of additional positions FSPSGs) of the growth in

⁶¹ Source: La Passerelle I.D.É., Mercer, Looking forward, Employment Opportunities for Ontario's Bilingual Francophone Talent, 2017, p.13

⁶² See Technical Appendix Table 4-23 for additional details on Employer Survey (2017) Q4, Q7, Q10, Q11.

⁶³ Source: Ministry of Finance Information Centre. Ontario Population Projections Update, 2015-2041. Spring 2016. <http://www.fin.gov.on.ca/en/economy/demographics/projections/index.html>

⁶⁴ A paired-sample t-test was conducted to compare the percent of FSPS workers in 2017 to the percent of FSPS workers in 2020. There was a significant difference for percent of FSPS in 2017 (M=7.6, SD=21.3) and percent of FSPS in 202 (M=10.1, SD=22.6); $t(415)=-4.763$, $p=.000$.

demand for FSPSGs between 2016 and 2020, and from 2020 to 2030 (81% of additional positions for FSPSGs).

Employers also provided estimates for their demand for FSPSG in 2030.⁶⁵ Between 2020 and 2030 six percent (6%) of employers projected their demand for French speaking postsecondary employees to continue to grow (one-third (30%) of those that projected an increase between 2016 and 2020). The growth between 2020 and 2030 was more modest than that reported between 2016 and 2020, growing from 5.9% to 6.6%). Employers' reticence in reporting a growth in demand could be due to uncertainty in future markets, or an understanding that their current employment of FSPSGs is low and are expecting the shortfall to be mostly addressed by 2020.

Projections of change or growth in employment of the FPS is difficult to estimate as these positions are not directly tied to the Canadian economy and primary data was not robust enough to develop reliable projections. However, the FPS workforce has remained relatively stable over the past 4 years ranging from 257,034 to 262,817. As a result, the FPS workforce was assumed to remain at 2016 levels (258,979) over the study time period.⁶⁶

The number of FSPSGs demanded in CSW Ontario's workforce is expected to be driven by an employer's increase in demand (preference) for FSPSGs, and driven by the growth of the CSW Ontario labour force. Between 2016 and 2030 the population in CSW Ontario is anticipated to increase. As the population increases, the labour force can also be assumed to increase. It is assumed that changes in the population of individuals that are labour force age (15 to 64) also result in a proportional increases in the labour force (i.e., a 5% increase in the population of individuals 15 to 64 results in a 5% increase in the labour force). In 2015 the Ontario Ministry of Finance (MOF) produced estimates for the change in population in Ontario by census sub-divisions, allowing for population projections specific to CSW Ontario. Between 2016 and 2020 the population (labour force) in CSW Ontario is projected to grow by 2.7%.⁶⁷ As well, between 2016 and 2030 the population (labour force) in CSW Ontario is projected to grow by 7.0%.

The number of FSPSGs employed by CSW Ontario employers in 2020 and 2030 is estimated based on the 2016 demand of FSPSGs, and changes in CSW Ontario's labour force according to MOF. In 2016, the demand for FSPSG in CSW Ontario is estimated to be 179,617. The proportion of FSPSGs in CSW employer's workforce is expected to increase from 4.4% of their workforce in 2016 to 5.6% in 2020. As well, between 2016 and 2020 the CSW Ontario

⁶⁵ To improve the internal consistency of the data the following assumption was made: employers who could not estimate their demand in 2030 were the same as that in 2020.

⁶⁶ Source: Government of Canada. Population of the Federal Public Service. Online article available at: <https://www.canada.ca/en/treasury-board-secretariat/services/innovation/human-resources-statistics/population-federal-public-service.html>. Last accessed: April 27, 2017.

⁶⁷ Source: Ministry of Finance Information Centre. Ontario Population Projections Update, 2015-2041. Spring 2016. <http://www.fin.gov.on.ca/en/economy/demographics/projections/index.html>

labour force is projected to grow by 2.7%.⁶⁸ It is estimated that by 2020 employer demand for FSPSGs will be 247,312, an increase of 67,695 positions.

The demand for FSPSGs by CSW Ontario employers between 2016 and 2030 follows a similar methodology. The proportion of FSPSGs positions in CSW Ontario is estimated to change from 4.4% in 2016 to 6.6% in 2030. As well, between 2016 and 2030 the CSW Ontario labour force is projected to grow by 7.0%.⁶⁹ It is estimated that there will be 289,339 positions for FSPSGs in CSW Ontario, an increase of 109,722 positions.

The estimation of growth of FSPSG in CSW Ontario's workforce is expected to under-represent the actual change in demand. The change in number of FSPSGs within the CSW Ontario workforce was based off of employers who already employed French-speaking employees. As a result, employers who do not currently employ French-speaking employees were assumed to have no demand for FSPSGs.

The employers that reported having French-speaking employees were typically much larger than those who did not have French-speaking employees.⁷⁰ Even though only a small proportion of employers predicted an increase in demand for FSPSGs, those that did would result in a larger proportional impact due to their larger share of employment.

The employer survey findings align with key informant interview sources and emergent findings in the document analysis. Key informants describe the increase in demand for FSPSG as “incontestable” by the majority of respondents at provincial and local jurisdictions. This demand is for bilingual employees and not uniquely French-speaking positions. The Mercer (2017) report similarly identified an expected increase in demand for FSPSG in their assessment of job postings that mention French in the description for both Ontario as a whole and for Toronto in particular. Specifically, their report found that 6% of job postings in Ontario contained the word French, while 7% of job postings in Toronto contained the word French.⁷¹ Taken together, all lines of evidence suggest that the demand of FSPSG are on the rise.

4.2.3 Labour Market Gap of FSPSGs in CSW Ontario

The labour market gap for FSPSGs is estimated based on the increase in demand for FSPSGs (please see section 4.2.2), the filling of current vacancies, and the need to replace workers

⁶⁸ Ibid.

⁶⁹ Ibid.

⁷⁰ Average number of FTEs at a company that employed French-speaking workers was 27.3 FTEs. The average number of FTEs at a company that did not employ French-speaking workers was 6.6 FTEs.

⁷¹ La Passerelle I.D.É., Mercer, Looking forward, Employment Opportunities for Ontario's Bilingual Francophone Talent, 2017

that are retiring from the CSW Ontario workforce, as well as from the FPS.⁷² Projections are made for the FPS and CSW Ontario workforce from 2016 to 2020, and to 2030.

Between 2016 and 2030 a proportion of the current workforce is expected to retire. Individuals are assumed to retire upon reaching the age of 65. The rate of retirement of individuals within the FPS and the rest of the labour force will be examined separately. As the FPS makes up such a small share of the Ontario's labour force, it is assumed that their removal from Ontario's labour force in our projections do not impact the retirement rate of the rest of CSW Ontario.

The rate of retirement in Ontario's labour force is not consistent over time. Three five-year age cohorts make up the individuals expected to retire between 2016 and 2030. The following table (Table 4-8) summarizes the proportion each cohort makes up of the CSW Ontario labour force, and the expected rate of retirement per year.^{73,74,75} Of the 174,947 FSPSGs currently working in CSW Ontario in 2017, 47,743 are estimated to retire from CSW Ontario's workforce between 2017 and 2030.

Table 4-8: Estimated Retirement of Ontario Labour Force

| Five-year Age Cohort | Proportion of Labour Force | Expected Retirement Rate ^a |
|---|----------------------------|---------------------------------------|
| 60 to 64 (expected to retire between 2017 and 2021) | 6.6% | 1.3% |
| 56 to 59 (expected to retire between 2022 and 2026) | 10.6% | 2.1% |
| 51 to 55 (expected to retire between 2027 and 2031) | 12.6% | 2.5% |

Note: a. Individuals inside each five-year age cohort are assumed to be evenly distributed.

Source: Statistics Canada. Table 282-0002 - Labour force survey estimates (LFS), by sex and detailed age group, annual (persons unless otherwise noted) (database) (accessed: April 26, 2017)

The retirement rate of workers in the FPS is projected to be higher as its workforce is older than that of the CSW Ontario labour force. The retirement rate of FPS employees is reported to be 3.4% in 2015-16, and projected to remain at a similar rate between 2016-17 and 2019-20 (range of 3.3% to 3.5%).⁷⁶ Assuming this rate of retirement remains at 3.4% per year, it is estimated 12,091 FSPSGs will retire from the FPS labour force by 2030.

⁷² The migration of workers into, and out of, CSW Ontario are not examined separately as they are included in the Ministry of Finance's population projection. As a result, newcomers to Ontario are not examined separately.

⁷³ Source: Statistics Canada. Table 282-0002 - Labour force survey estimates (LFS), by sex and detailed age group, annual (persons unless otherwise noted) (database) (accessed: April 26, 2017)

⁷⁴ The rate of retirement for the Ontario labour force is assumed to be representative of the rate of retirement for FSPSGs.

⁷⁵ Individuals inside age buckets are assumed to be evenly distributed.

⁷⁶ Source: Government of Canada. Demographic Snapshot of the Federal Public Service, 2015. Online article available at: <https://www.canada.ca/en/treasury-board-secretariat/services/innovation/human-resources-statistics/demographic-snapshot-federal-public-service-2015.html>

Between 2017 and 2030, 59,834 FSPSGs are anticipated to retire from the CSW Ontario labour force and the FPS labour force. The following table (Table 4-9) summarizes the number of FSPSGs that will retire in 2017, 2018-2020 and 2021-2030.

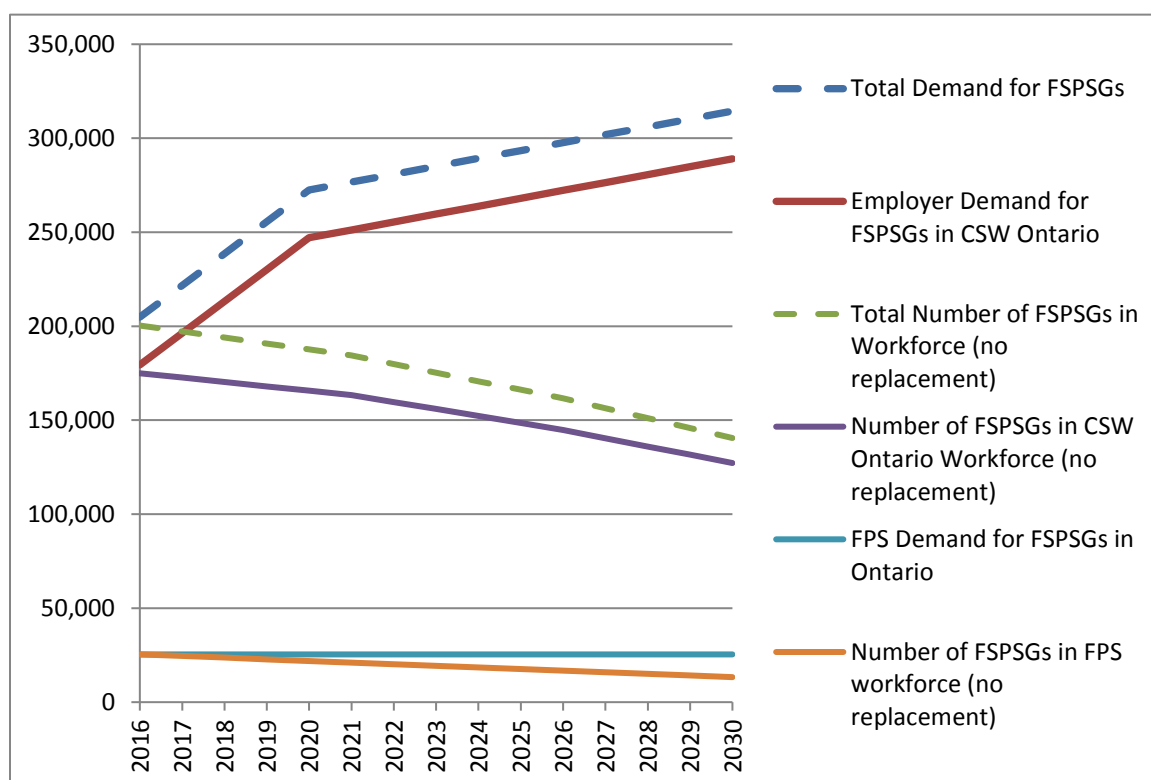
Table 4-9: Estimated Number of Individuals Retiring from the FPS and CSW Ontario's Labour Force (2017 to 2030)

| Year | 2017 | 2018-2020 | 2021-2030 | Total |
|---|--------------|---------------|---------------|---------------|
| Estimated Number of FSPSGs in CSW Ontario's labour force Retiring | 2,316 | 6,947 | 38,481 | 47,743 |
| Estimated Number of FSPSGs Employed by the FPS Retiring | 864 | 2,591 | 8,636 | 12,091 |
| Total | 3,179 | 9,538 | 47,117 | 59,834 |
| Cumulative Total | 3,179 | 12,717 | 59,834 | - |

Source: Estimation based on Government of Canada data, Ontario Ministry of Finance population projection, and Statistics Canada data.

The increased demand for FSPSGs in CSW Ontario, current vacancies, and the retirement of FSPSGs from the labour market, is estimated to result in a labour market gap of 172,748 FSPSGs by 2030 (assuming no replacement). The following figure (Figure 4-1) represents each component of the demand for FSPSGs and the current supply of FSPSGs in the workforce between 2016 and 2030.

Figure 4-1: CSW Ontario Employer Demand for FSPSGs and the number of FSPSGs in the CSW Ontario Workforce (2016 to 2030)



4.2.4 The degree of difficulty recruiting FSPSGs in CSW Ontario

The majority of employers in our employer survey did not respond to our inquiry about their degree of difficulty recruiting FSPSGs as they reported not recruiting FSPSGs. Of those that recruit FSPSG (n=63), the majority of them (67%) reported encountering difficulties when hiring FSPSGs. These employers rated FSPSGs as either somewhat difficult or very difficult to hire. Due to the small number of employers providing insight into the difficulty of recruiting FSPSGs, analysis by industry or firm size was not possible.

Key informant findings align with the employer survey results that employers seeking FSPSG have a hard time finding functionally bilingual (both oral and written French and English) employees in the sectors/occupations identified in Section 4.2.1. Key informant interviews further suggest a high degree of turnover in the education sector, perceived as the largest sector employing FSPSG in CSW Ontario (including daycare centers, school board administrators and educators). While half of the key informants expressed increasing demand for FSPSG in their geographic regions, there was the perception that French services were poorly financed and ultimately offered lower salaries to FSPSG employees. The most commonly cited example was FSBs which offered lower wages than ESBs. These qualitative findings do not align with findings from the Mercer Report (2017) *Looking forward, Employment Opportunities for Ontario's Bilingual Francophone Talent* that found that *advertised salaries* in Ontario were appreciably higher (notably 18-20% higher) for employment opportunities that contain “French” in their description. This may reveal a distinction between advertised versus actual salaries, particularities of a poorly funded French-language education network, or limits to the availability of qualified FSPSG in CSW Ontario. The value of FSPSG should be explored in greater detail in future research in order to quantify changes in perceived value over time, and the impact this would have on a French-language university should it be developed.

Discussions regarding recruitment challenges for FSPSG often revealed that the French-speaking Community Member Networks were well integrated, and were often contacted to help recruit FSPSG positions. Overall, key informants generally agreed there was a shortage of qualified FSPSG in high demand sectors. Strategies to fill positions often used multiple strategies such as posting positions on the federal government website, the *Service Emploi Boréal*, the *Réseau Immigration* with little success. Recruitment efforts often required employers to recruit out-of-province in Quebec and New Brunswick mostly. Slightly less than 1/5th of key informants mentioned that they recruited from France.⁷⁷ A quarter of key informants who deal directly with employers mentioned an increasing trend for employers to bypass FSPSG recruitment problem by opening offices in Quebec to for their client service departments.

⁷⁷ Recruitment locations were represented in rank order based on respondent responses.

4.2.5 Employers intention to establish partnerships with a French-language university

Employers were asked about their partnerships, and interest in forming partnerships with postsecondary institutions. The vast majority of employers (72%) indicated that they currently do not offer a co-op program, internship, or professional development training through a postsecondary institution. The health care and social assistance industry and other services industry were more likely to be involved in a partnership with a postsecondary institution than other industries (38% and 44% vs. 28%).⁷⁸ Due to the small sample size of the employer's survey no meaningful differences can be measured for different demographic characteristics.

The majority of employers (63%) did not express an interest in establishing a co-op, internship, or professional development training with a French-language university.⁷⁹ Employers who were not currently engaged in a partnership with a postsecondary training institution were more likely to express not having an interest in establishing a relationship with a French-language university than those currently engaged in partnerships (72% vs. 39%).⁸⁰ This suggests that employers who had existing partnerships with postsecondary training institutions may be more receptive to partnerships and should therefore be targeted for future French-language university partnerships. Nearly two-thirds of employers (61%) currently engaged in a partnership with a postsecondary institution expressed being interested in establishing a partnership with a French-language postsecondary institution. In terms of specific skills training programs, employers were largely interest in industry specific training (54%). Employers were also interested in the development of employee interpersonal skills (leadership and communication) by 16%, and language competency by 11%.

Employers were also asked to identify specific skills training programs a French-language university should offer to meet their workforce requirements. The majority of employers, regardless of whether they employ French-speaking employees, did not know which skills training programs a French-language university should offer.⁸¹ Of those employers who did identify specific training programs for a French-language university half (54%) identified programs that are specific to their industry.⁸² The most commonly identified skills training

⁷⁸ A chi-square test of independence was performed to examine the relationship between industry and current partnerships with a post-secondary training institution. The relationship between these variables was significant, $\chi^2 (4, N=493)=9.830, p<.05$.

⁷⁹ Level of interest in establishing a partnership with a FLU did not vary by sector or industry.

⁸⁰ A chi-square test of independence was performed to examine the relationship between current partnerships and the establishment of a partnership with a French-language post-secondary training institution. The relationship between these variables was significant, $\chi^2 (1, N=442)=41.62, p<.01$.

⁸¹ One-third (67%) of employers without French-speaking employees did not provide feedback and three-fifths (57%) of employers with French-speaking employees did not provide feedback.

⁸² The wide variety of industries included in the Employer survey prevented specific programs from being identified for focus.

programs that were not industry specific included the development of interpersonal skills (e.g., leadership and communication) by 16% of employers, and language competency training by 11% of employers.

4.2.6 Conclusions

FSPSGs represent 4.4% of the current CSW workforce. Employers project that over the next fourteen (14) years their demand for FSPSGs will increase by 61%, requiring an additional 109,722 FSPSGs. As well, over the same time period 59,834 FSPSGs are estimated to retire. By 2030 it is estimated that there will be a labour market gap of 174,226 FSPSGs. This growth in demand is expected to be underreported as it only includes employers that currently employ French-speaking employees. As well, it does not include FSPSGs leaving labour force for other reasons than retirement.

The majority of the growth is projected to occur over the next few years (2016 to 2020), and is estimated to result in 67,695 FSPSGs positions being created. Employers currently report encountering difficulty in hiring FSPSGs (67% of employers reporting),⁸³ often having to recruit outside of the province in Quebec, New Brunswick, or out of the country (France). The large increase in number of FSPSG positions is expected to exacerbate current challenges employers are facing in filling FSPSGs positions.

4.3 Expectations of, and Aspirations for, a French-Language University in CSW Ontario

In order to plan for the development of a French-language university this study conducted semi-structured interview and focus groups with a purposeful sample of: 1) postsecondary students attending different institutions in Ontario; 2) Francophone community organizations, service providers, advocacy groups; and, 3) publically funded educational institutions (See Table 2-1 for details). This section of the report explores the interest and need for a French-language university from the aforementioned stakeholder perspectives. The study found significant convergence between all three stakeholder perspectives on: 1) the essential elements of a French-language university (Section 4.3.1); 2) desired partnerships for a French-language university (Section 4.3.2); 3) the perceived role of a French-language university to preserve the vitality of French-speaking communities in Ontario; 4) the expected role of government to build the demand for a French-language

« Nos homologues anglophones n'ont pas nécessairement à choisir ou à prioriser, je crois que ça devrait être la même situation pour les francophones pour avoir une expérience postsecondaire complète et enrichissante et égale à nos homologues anglophones. »

"If you want this FLU to work, you need to make sure that students get the same experience as if they were going to an English university. You can't cut corners in terms of infrastructure, services, and activities. Everything you see in a university that is recognized globally as being prestigious, like research centers of excellence, needs to be present."

⁸³ Source: 2017 CSW Ontario Employers Survey

university; 5) the preferred ways to differentiate and market the French-language university; and, 6) the preferred location for a French-language university. Areas of divergence between stakeholder perspectives are reported where they were found.

4.3.1 Essential elements of a French-language university (including programs and service offerings)

Significant convergence between postsecondary students and key informants perspectives on the essential elements of a French-language university in CSW Ontario were found. Stakeholders described a university with the same physical, social, cultural, and service offerings available in elite English universities in Ontario. Key elements of a French-language university included:

General undergraduate program options: The French-language university should offer a full spectrum of general undergraduate program options that appeal to the broad student population such as social science, science and math, health sciences, business/commerce/management, arts and humanities. Once general undergraduate courses were well established, stakeholders expressed a desire for the French-language university to specialize in professional undergraduate programs such as engineering, law, medicine, architecture, and select specialized graduate programs that would benefit the French-language community in Ontario (e.g. management of social enterprises and cooperatives).

Physical infrastructure: The French-language university should have the physical infrastructure that any high quality university would have in order to create a “*quality student experience*”. This would include libraries, student centres, sports centres, cafeterias, coffee shops, bookstores, libraries, science and computer labs, daycares, and student residences.

Essential services: The majority of stakeholders mentioned the importance of supports for new immigrant learners *on campus* to help with accreditation processes to recognize educational credits acquired in other countries, newcomer programs, and adapted learning environments including English and French proficiency courses at all levels. All essential services should be offered in both French and English, and considerations be made for *off-hour* services (evenings and weekends) that remove barriers to students (including new immigrants, and single parents).

Social and cultural experiences: A “*quality student experience*” was stressed by all stakeholders including diverse social and cultural experiences. Many stakeholders wanted to see francophone cultural and linguistic activities promoted by the university including a French radio station, dance/music/theatre, extracurricular activities, rich and diverse student clubs, and sports teams to develop school spirit. All stakeholders stressed the central importance of social and cultural experience to provide students with a sense of belonging to the Francophone community and the educational institution as a whole.

Work placement, co-op programs, and internships: Students were looking to balance theoretical and applied knowledge in order to be marketable upon graduation. They were looking for French and bilingual work environments.

Program delivery: The majority of stakeholders interviewed, and secondary students preferred in person face-to-face learning (87%). Few stakeholders were interested in intensive postsecondary courses (evening, weekends, summer, etc.) and online courses (less than 2%); however some students were interested in a combination of face-to-face and online courses (9%).

Competitive scholarships: Competitive scholarships for Canadian and international students were mentioned as essential elements to a French-language university by most participants.

Francophone learning environment: Most participants described the need to create a truly francophone environment where the use of the French language were paramount. Participants described a desire for French governance for the university, French-first communication policies, and French textbooks and resource materials in all courses.

Established faculty: The university should have senior faculty members with strong reputations for innovation, research, and teaching in French. There was a desire for the French-language university to have visiting faculty on a semester or full academic year basis from within Canada and from abroad. Some participants specifically requested that faculty members reflected the ethnic and cultural diversity of the student population.

Research centres: The university should have several research centers that are affiliated with different institutions and organizations.

Areas of divergence between interviewed stakeholders center on the perceived value and preference for a stand-alone French-language university infrastructure in CSW Ontario (65%) versus a provincial French-language university with multiple satellite campuses throughout the province (35%). Most stakeholders, including postsecondary students and key informants, expressed difficulty visualizing what a provincial French-language university might look like in CSW Ontario. The tension appears to surround avoiding the replication of failed past attempts at establishing an French-language university using a satellite campus structure through a French-institution network. The *Collège des Grands Lacs* was presented as a warning to ensure that French-speaking students experience student life in the setting that they most desire, namely a fully French learning environment. Stakeholders expressed concern about the size of the potential French-language university, and the need for it to be large enough to provide students with the infrastructure and programming they described above. Stakeholders generally agreed that an French-language university should be at least 10,000 students to be financially sustainable and desirable to students.

Warnings from local stakeholders who have failed or only partially succeeded in previous attempts to create satellite campuses in local jurisdictions explained why these satellite campuses have not worked in the past. It is because they were unable to create “a quality

student life experience”, “a real sense of belonging”, and “a sense of being valued as French-language students” in a networked institutional environment. Stakeholders who are adamantly against satellite campuses express the sense of rejection, lack of belonging, and lack of collective identity characteristic of these satellite campuses. Further, it does not respond to the need for a full spectrum of program options to be fully offered by one institution without unnecessary delays due to constrained access to core courses in French on one campus. In the opposing camp, there are 35% of stakeholders (mostly from the Ottawa region) who argued for equal access to French-language university close to their homes through a provincial French-language university based on satellite campuses. Student preferences for locations, and the topic of pursuing PSE close to home will be addressed in greater detail in Section 4.3.6, Preferred locations for a French-language university in CSW Ontario.

4.3.2 Desirable partnerships identified by students and Francophone community members for a French-language university

Partnerships with educational institutions: Establishing partnerships with educational institutions in Ontario at all levels (primary, secondary, college, and universities), in other provinces, and internationally within French-speaking countries (most importantly European and African countries) was described as desirable from a large majority of stakeholders. Within Canada, these partnerships should include English, bilingual and French institutions. The intent was mostly to facilitate recruitment of students for the French-language university, and to build a strong student exchange program that provide students with an edge in the workforce while facilitating access to core course offerings.

"The more partnerships that are developed the better the university will do."

"L'union fait la force."

Partnerships with employers: Establishing partnerships with employers in CSW Ontario was described as essential to create work placements, internships, and co-op opportunities for students attending the French-language university. The intent would be to create work placement opportunities in French, bilingual and in *French-friendly* work environments. International work placements were similarly desirable for postsecondary students who wanted to take advantage of labour mobility with the European Union, and open new markets for Canadian companies. Innovating learning experiences such as one year community affiliated research projects (majors) were also mentioned by some respondents.

Partnerships with the francophone community networks: Key informants representing francophone community organizations were all interested in establishing partnerships with a French-language university in CSW Ontario. They described mutually beneficial synergies that would stimulate the vitality of the francophone community. CSW Ontario was described as having strong francophone networks that could support research, innovation and development of workforce opportunities.

Partnerships with professional bodies: Partnerships with professional bodies that regulate education, law, medicine, nursing, architecture, and engineering professions would be essential in order to accredit specialized program options when they are added to the French-language university. Partnerships to accredit education experiences or credentials of new immigrants and newcomer learners were described as an essential service to be offered at the French-language university.

4.3.3 Perceived role of a French-language university to preserve the vitality of French-speaking communities in Ontario

Postsecondary students and key informants agreed that a French-language university would preserve the vitality of French-speaking communities in Ontario. Stakeholders would like

the French-language university to promote both the French-language and culture throughout the province as a whole and CSW Ontario in particular. A French-language university was thought to promote a sense of legitimacy and a sense of identity through the establishment of an institution. The impact was thought to enlarge the French living spaces in Ontario, serving as an “*anti-assimilation mechanism*” for the French-speaking population in the province.

When asked how the French-language university could preserve the vitality of the French-speaking community, stakeholders added that a key role would be to form synergies between the French-language community and employers, and where possible, reinforce existing ones. Together, these actions were thought to foster economic development and likely to generate new opportunities for French commerce in Ontario. A French-language university was also thought to: 1) create opportunities to speak more French in Ontario; 2) to create the social space where French-speaking youth could congregate and establish lifelong relationships that lead to marriage and children; 3) encourage more French-speaking people to acquire postsecondary degrees; and, 4) to help immigrant Francophones join the Ontario workforce. Together, these actions would create increased value for the French language in Ontario.

“The impact of a university is that it touches everything. It gives the youth the opportunity to develop in the language of their choice. They will soon be the contributors to our economy, and to French culture and language. If it is unsupported, it will be lost. The people who were originally raised in a uniquely French culture in Ontario are now older – the urgency to fight to preserve the culture is no longer the same as it once was. Thus, if sustaining opportunities such as this French-language university are not provided soon, the youth will abandon the French language and culture.”

« Une communauté minoritaire qui n’a pas d’institution, qui a de la difficulté à former ses professionnels dans une langue, c’est une communauté qui est beaucoup moins valorisée dans l’espace public et est beaucoup moins en santé. On sait que les décideurs, les professionnels de ce monde, c’est ceux qui, veut, veut pas, sont près des décisions, c’est des gens qui sont passés par le postsecondaire donc c’est toute une génération qu’on est en mesure de former dans une langue qui sont capables de faire de la recherche, d’apprendre, de découvrir le savoir d’une langue et d’une communauté donc c’est clair que ça a un impact majeur sur leur identité personnelle. »

« En Ontario (CSO), nous avons presque tous les niveaux d’éducation en français et non une université de langue-française donc ce serait la logique et la continuité. Démontrer que les français, nous avons notre place et nous sommes ici pour rester, que nos luttes sont et ont été valables. »

« Avoir une université francophone donnera la chance à la culture francophone de se développer et donnera la chance à plus de gens de parler français. »

« Ca deviendrait un pôle culturel et économique. Un bon lieu de rassemblement pour la communauté francophone dans le CSO pour partager et faire vivre la culture et le commerce francophone. »

4.3.4 The expected role of government to build the demand for a French-language university

In order to ensure the success of the French-language university, a majority of key informants wanted the government to take an active role in building the demand for a French-language university. This active approach consists of ensuring that the necessary financial investments are made so that the French-language university can compete against prestigious English universities in the province.

« Ce n'est pas le rôle d'une université franco-Ontarienne de générer la demande, le rôle de l'université franco-Ontarienne est de répondre à la demande. La vraie problématique est de savoir si les preneurs de décisions sont en train de démocratiser le français dans tous les secteurs. »

« Arrête de construire une université avec des vœux et met du cash en arrière. On doit avoir plus d'équité avec les anglophones. »

« If several French-language universities can coexist side-by-side in Montreal, I have no doubt that one French-language university can exist and thrive in CSW Ontario. »

Further, stakeholders would like to see the school as one of several strategies employed by the Province of Ontario to ensure the sustainability of French-speaking communities. Key informants believed that the government could reinforce demand for an French-language university and enrich the Ontario population by designating the province as officially bilingual. They also would like to see more employer incentive programs to hire French-speaking or bilingual workforce as strategic initiatives. Further key informants wanted greater collaboration between PSE institutions to avoid competition between institutions that may weaken the French-language education network in Ontario.

Building the demand for the French-language university was described as requiring *“a great deal of marketing to Ontario youth, parents, employers, and international students at provincial, inter-provincial and international levels to change deeply rooted perceptions of the value of a French-language university”*. Respondents are hoping that essential elements for a French-language university identified in Section 4.3.1 of this report will be taken into consideration during planning phases. *« Il a beaucoup de gens et de bénévoles qui font beaucoup pour maintenir le français en Ontario. Construire l'université serait un geste symbolique pour démontrer qu'ils croient en nous. »*

4.3.5 Preferred ways to differentiate and market the French-language university

Preferred ways to differentiate and market the French-language university were discussed with postsecondary students and key informants. The two most preferred ways were to establish an authentic French environment, and establish a prestigious French-language university with strong linkages to teaching, research, and innovation.

The authentic French environment would include strategic decisions to ensure that the environment remains exclusively French. Ideas proposed by key informants include: 1)

establishing a French first communication policy; 2) ensuring a French governance structure (*gouvernance pour et par les francophones*); 3) ensuring French resources (textbooks, computer software, articles, and materials); 4) ensuring a global and an inclusive francophone culture to target the French-language university to new immigrant populations from French-speaking countries.

Strategic decisions to build a prestigious French-language university include: 1) offering competitive scholarships for Canadian and international French-language students; 2) hiring established senior faculty with strong reputations for innovation, research, and teaching in French (including visiting faculty from established universities in African and Europe and offer a means for the faculty to reflect the cultural diversity of students); 3) establishing student exchange networks with leading colleges, universities and professional training organizations worldwide; and, 4) establishing work placement, internships and co-operatives with employers in the CSW Ontario and beyond.

4.3.6 Preferred locations for a French-language university in CSW Ontario

Most secondary students (59% FSB, 72% ESB),⁸⁴ postsecondary students (90%), and key informants (85%) identified Toronto as the preferred site for the French-language university. Toronto was described as a desirable location based largely on its character as a multicultural city with the largest francophone population in CSW Ontario. Further, Toronto was said to have an existing French-language infrastructure, excellent public transportation, a large number of employers for partnership building, and the most desirable location of newcomer learners.

When asked about the reasons that motivated the selection of preferred locations of a French-language university, the most commonly cited reason for secondary students was to permit students to have their social support networks nearby while pursuing their postsecondary education (67%).⁸⁵ The second most popular reason for their preferred location for a French-language university was to keep costs low (56%), and the third most popular reason was an expressed preference to move to another city for their postsecondary education (50%).

Significant differences between FSB and ESB secondary students regarding their preferred location for a French-language university were observed (See Table 4-10). Students from FSB were more likely to indicate that they prefer to live in a small city during their studies (26% vs. 18%) and that these locations enable them to keep costs low during their postsecondary education (64% vs. 51%). On the other hand, students from FSBs were less likely to say these locations allowed them to have support from their family and friends

⁸⁴ See Table 4-24 in Technical Appendix for additional details regarding secondary student location preferences.

⁸⁵ Our secondary student sample was Toronto centric.

(62% vs. 71%), that they preferred to live in a large city (44% vs. 49%) and that these locations increased opportunities for social and cultural activities in French (39% vs. 49%).

Table 4-10: Secondary Students Reason for Preferred French Language University Location by School Board

| Reasons for preferred new French-language university location | French SB (n=306) | | English SB (n=411) | |
|--|-------------------|-----|--------------------|-----|
| | Yes | No | Yes | No |
| I prefer to live at home in my current residence | 38% | 43% | 42% | 43% |
| I prefer to move to another city for my postsecondary education | 51% | 32% | 49% | 33% |
| I prefer to live in a small city during my postsecondary education | 26% | 53% | 18% | 50% |
| I prefer to live in a medium sized city during my postsecondary education | 37% | 40% | 37% | 30% |
| I prefer to live in a large city during my postsecondary education | 44% | 36% | 49% | 24% |
| These location allow me to keep cost low during my postsecondary education | 64% | 21% | 51% | 22% |
| These locations allow me to have social supports (family and friends) nearby during my postsecondary education | 62% | 23% | 71% | 17% |
| These locations offer increased opportunities for social and cultural activities in French | 39% | 36% | 49% | 21% |
| Other | 2% | 91% | 4% | 92% |

Source: Secondary student survey, Question 18 (2017) (n=717)

A minority of key informants, postsecondary students and secondary students expressed a preference for a Windsor French-language university location.⁸⁶ Key informants and postsecondary students who identified Windsor as their preferred location did so because: 1) it would be a strong political gesture for the Government of Ontario to acknowledge one of the largest and oldest francophone populations in the province that needs to be rejuvenated; 2) it has an established community network of francophone employers and stakeholders; 3) has global reach with its airport, good public transportation and proximity to US markets; 4) there is said to be high demand for FSPSGs; 5) its multicultural urban

⁸⁶ Windsor was identified as the preferred location by 10% of key informants and as a first choice location for 4% of secondary students, and 4% second choice for secondary students (after TO). The percent of secondary student preferences is underestimated as the secondary student survey sample was Toronto centric and did not include secondary students from Windsor or its surroundings.

center that would allow the French-language university to keep living expenses low for students.

4.3.7 Conclusions

Significant convergence between postsecondary students and key informants perspectives on the essential elements of a French-language university in CSW Ontario were observed. They described a university with the same physical, social, cultural, and service offerings available in English universities. Postsecondary students and key informants agreed the university would preserve the vitality of French-speaking communities in Ontario. Most secondary students, postsecondary students, and key informants identified Toronto as the preferred site for the French-language university (66%-85%). Toronto was described as a desirable location as a large multicultural city with the largest francophone population in CSW Ontario. Further Toronto was said to have an existing French-language infrastructure, excellent public transportation, a large number of employers for partnership building, and the most desirable location for newcomer learners.

4.4 Market Analysis for French-language University

The previous two sections explored the demand for French-speaking postsecondary graduates, and insight into CSW Ontario youth's interest in a French-language postsecondary education. This section explores the number of individuals that make up the potential pool of students for a French-language postsecondary institution. This section explores the supply of youth, adult, and newcomer learner postsecondary students; the supply of postsecondary institutions to meet the expected demand; and then a comparison of employer demand for FSPSGs and the potential supply of FSPSGs. The goal of this section is to provide insight into the ability of the sources of FSPSGs to meet the CSW Ontario employers' and the Federal Public Service's demand for FSPSGs.

4.4.1 The supply of youth, adult learners, and international postsecondary students

Examination of the potential size of the student population for a proposed French language postsecondary institution requires an examination of four potential "supply sources". These include Ontario's youth attending French secondary schools and French-immersion programs at English secondary schools, Ontario's francophone adult population pursuing a postsecondary education, students transferring from other Ontario postsecondary institutions, and international students pursuing a postsecondary education in Ontario. There are also other potential source populations, such as Francophone/immersion students residing in other provinces, but it would be difficult to estimate the potential number of such students who would move to Ontario to attend a proper French language postsecondary institution. Detailed in this analysis is the estimate of the supply of students that constitute the potential pool of students who could attend a proposed French-language postsecondary institution.

4.4.1.1 Supply of Youth

The supply of Ontario Youth for a French-language postsecondary institution is examined in two parts; Francophones attending French secondary school boards, and Anglophones attending French immersion programs at English secondary school boards. The estimation for the number of students is based off of Ontario enrolment figures for grade 12 students scaled to CSW Ontario. The number of grade 12 students is then projected over the study time frame using population estimates from the MOF to determine the number of grade 12 students in each year of the study time frame. High school graduation rates are then applied to the population to determine the number of high-school graduates that will be eligible to enroll in a postsecondary program. Next, the number of high-school graduates that are expected to pursue a postsecondary program are estimated based on high school – postsecondary transition rates. Finally, student preference for a French-language postsecondary institution (based on the student survey) is explored to determine the total number of youth that could attend a French-language postsecondary institution.

The number of Ontario youth enrolled in FSBs⁸⁷ is relatively small, account for 4.9% of all youth enrolled in public schools for the 2014-15 school year.⁸⁸ This proportion has remained relatively stable, approximately 4.6% (average) over the past five years (2010-11 school year to 2014-15), ranging between 4.4% and 4.9%. The proportion of francophone youth in French secondary school boards is much lower. In the 2014-15 school year they accounting for only 3.7% of secondary school students, averaging 3.6% over the past five years.

CSW Ontario's FSBs account for one-third (34.7%) of all Francophone students enrolled in French schools.⁸⁹ CSW Ontario's share of students enrolled at FSBs has increased between 2011-2012 and 2014-15 from 32.8% to 34.7%.⁹⁰ Due to the small number of observations, the CSW share for FSB was left unchanged at the current (2015) share of 34.7%.

The number of francophone youth in French-language programs in Ontario public schools was projected over the timeframe of 2016-17 to 2029-30 using the MOF population projections. The MOF projections provide estimations of population growth by age, not grade. As well, MOF projections did not specify individual's languages. As a result, population projections for youth at ESB and FSB are assumed to be the same. Youth begin

⁸⁷ Youth enrolled in first official language programs for the linguistic minority in grade 1 through 13.

⁸⁸ Source: Statistics Canada. Table 477-0025 - Number of students in regular programs for youth, public elementary and secondary schools, by grade and sex, Canada, provinces and territories, annual (number), CANSIM (database). (accessed: January 9, 2017)

Source: Statistics Canada. Table 477-0027 - Enrolments in official languages programs offered in public elementary and secondary schools, by type of program, grade and sex, Canada, provinces and territories, annual (number), CANSIM (database). (accessed: January 9, 2017)

⁸⁹ Source: Ontario Ministry of Education. Ontario public schools enrolment 2014-2015 Academic Year. (database). (accessed: May 5, 2017)

⁹⁰ Source: Ontario Ministry of Education. Ontario public schools enrolment 2011-2012 Academic Year. (database). (accessed: May 5, 2017)

grade one between the ages of 5 or 6, and those ages 17 and 18 can be reasonably assumed to be completing their grade 12 education. As a result, it is assumed that the number of youth aged 17 and 18 act as a proxy for the number of youth in grade 12.

High school graduation rates vary from school board to school board.⁹¹ However, enrolment figures provided by Statistics Canada are not school board specific, instead reporting on that of all of Ontario. The high school graduation rate for CSW Ontario was estimated based on high school graduation rates of public school boards residing within CSW Ontario. Twenty (20) public school boards were identified as residing within CSW Ontario.⁹² School boards were classified as being French or English. The following table (Table 4-11) summarizes the average four year and five year graduation rates for French and English public school boards in CSW Ontario. It is assumed that the high school graduation rate in 2014/15 will remain constant over the projection period.

Table 4-11: Average High School Graduation Rates in CSW Ontario Public School Boards (2014-15 school year)

| Public School Board | Average Four Year Graduation Rate | Average Five Year Graduation Rate |
|---------------------|-----------------------------------|-----------------------------------|
| French | 87.6% | 91.1% |
| English | 73.0% | 82.2% |

Source: Ministry of Education. 2017. School Board Progress Reports. Online article available at: <https://www.app.edu.gov.on.ca/eng/bpr/indresults.asp>. Last accessed: April 22, 2017.

Based upon the projection of number of youth in grade 12 and the four and five year high school graduation rates it is estimated that between 2016/17 and 2029/30 that there will be 27,995 Francophone students graduating from grade 12 in FSB in Ontario; 9,705 of which from CSW Ontario schools. During the same period it is estimated that 64,911 youth will graduate from grade 12 from French Immersion and Extended French programs at ESB in Ontario; 52,683 of which from CSW Ontario schools.

The demand for a French-language university can be estimated based on the number of youth graduating from high school from secondary school in FSB and ESB. Direct information about the transition rates of Ontario high school youth to postsecondary programs was not available. However, the BC Ministry of Education's Student Transition Project (STP) provides insight into high school youth's continued education. The study examined cohorts graduating between 2004/05 to 2013/14 determining the proportion of graduates that directly enter into postsecondary programs, and those with delayed entry. The ten year cohort averages were used to estimate the proportion of Ontario high school graduates that transition to postsecondary programs. In BC roughly half (52.3%) of youth completing their high school education transition directly into a postsecondary program,

⁹¹ Source: Ministry of Education. 2017. School Board Progress Reports. Online article available at: <https://www.app.edu.gov.on.ca/eng/bpr/indresults.asp>. Last accessed: April 22, 2017.

⁹² School boards were identified based on the census division they served. School boards that served census divisions inside the catchment area and census divisions outside the catchment area are included.

and one-tenth (10.6%) delay their entry by one year.^{93,94,95} Two-thirds (65%) of youth who transition from high school to universities, while the remaining third (35%) transition to colleges or institutes.⁹⁶ Applying this transition rate to CSW Ontario's Francophone and French immersion student populations, it is possible to estimate the likely number of youth in the CSW who would transition to a postsecondary institution (although not necessarily a French-language institution). It is estimated that between 2016/17 and 2029/30, 6,541 youth graduating from official language programming for the linguistic minority (OLPLM) will transition to a post-secondary institution, and that 35,507 youth graduating from French-immersion programs will transition to a postsecondary institution. The following table (Table 4-12) breaks down high school graduates enrolling in post-secondary programs up to two years after graduation by type of program.

Table 4-12: Estimated Number of CSW Ontario High School Recent Graduates Enrolling in Post-Secondary Programs by type of Program (2016/17 to 2029/30)

| High School French-Language Program | Recent Graduates Enrolling in Universities (2016/17 to 2029/30) | Recent Graduates Enrolling in College & Institutes (2016/17 to 2029/30) | Recent Graduates Enrolling in Post-secondary Education (2016/17 to 2029/30) |
|---|---|---|---|
| Official Language Programming for the Linguistic Minority (OLPLM) ⁹⁷ | 4,252 | 2,289 | 6,541 |
| French Immersion ⁹⁸ | 23,079 | 12,427 | 35,507 |
| Total | 27,331 | 14,717 | 42,048 |

Source: Estimate based on BC Transition rates, Ontario Ministry of Finance population projection, and Statistics Canada data.

Secondary students enrolled in FSB were asked about their preference to pursue a French-language postsecondary program. One-eighth (13%) of youth in FSB expressed a preference to pursue a French-language postsecondary program, while very few (1%) of youth in ESB reported the same preference.⁹⁹ Based on the transition rate to postsecondary programs,

⁹³ British Columbia Ministry of Advanced Education. 2016. Research Results from the Student Transitions Project. Online article available at: http://www2.gov.bc.ca/assets/gov/education/post-secondary-education/data-research/stp/stp_highlights_july2016.pdf

⁹⁴ Transition rates were for all students and not differentiated for Francophones and Anglophones.

⁹⁵ Transition rates for French immersion students are the same as non-French immersions for grade 12 students. Transition rates for grade 12 students at French schools was unavailable.

⁹⁶ Source: British Columbia Ministry of Advanced Education. 2016. STP Fast Facts. Online article available at: http://www2.gov.bc.ca/assets/gov/education/post-secondary-education/data-research/stp/stp_fast_facts_2016-06-01.pdf

⁹⁷ Secondary students in FSB.

⁹⁸ Secondary students in ESB.

⁹⁹ Source: Secondary student survey, Question 10 (2017). Of the students who expressed a preference (i.e., excluding "I don't have a preference", and "I don't know"), 13% of students enrolled in French schools reported they prefer to enroll in a French postsecondary institution, 1% of students enrolled in French immersion programs at English schools reported they prefer to enroll in a French postsecondary institution.

and the preference of French-language postsecondary institutions, it is estimated that between 2016/17 and 2029/30, 1,205 students would enroll in a French-language postsecondary institution. This enrolment is relatively small, representing an **average of 86 enrolments per year**. The following table (Table 4-13) provides an estimate of the projected number of recent high school graduates enrolling in French-language post-secondary program by type of program.

Table 4-13: Estimated Number of CSW Ontario High School Recent Graduates Enrolling in French-Language Postsecondary Program by type of Program (2016/17 to 2029/30) - Base Case Scenario

| High School French-Language Program | Recent Graduates Enrolling in French-Language Universities (2016/17 to 2029/30) | Recent Graduates Enrolling in French-Language College & Institutes (2016/17 to 2029/30) | Recent Graduates Enrolling in French-Language Post-secondary Education (2016/17 to 2029/30) |
|---|---|---|---|
| Official Language Programming for the Linguistic Minority (OLPLM) | 553 | 298 | 850 |
| French Immersion | 231 | 124 | 355 |
| Total | 784 | 422 | 1,205 |

Source: Estimate based on BC Transition rates, Ontario Ministry of Finance population projection, and Statistics Canada data.

In discussions with stakeholders, and in focus groups conducted with youth, it does appear that the establishment of a "local" French-language postsecondary institution could have an impact in terms of encouraging more students enrolled in French schools, and French immersion education, to consider a French-language postsecondary education. Based on these insights, a second estimation of student interest in a French-language institution was undertaken. Under the high enrollment scenario all youth graduating high school from a FSB and who are likely to enroll in a postsecondary program are assumed to have a preference to pursue a French-language postsecondary program. As well, 2% of youth in French immersion programs in ESB are assumed to have a preference to pursue a French-language postsecondary program if such a program was to be made available in CSW. It is estimated that between 2016/17 and 2029/30, 7,251 CSW Ontario youth would enroll in a French-language postsecondary institution. The following table (Table 4-14) breaks down recent high school graduates enrolling in French-language postsecondary programs by type of program for the high enrollment scenario.

For reporting purposes, FSB = OLPLM in secondary sources and ESB= French Immersion students in secondary sources. Secondary students attending Extended French programs are not represented in estimates.

Table 4-14: Estimated Number of CSW Ontario High School Recent Graduates Enrollment in French-Language Postsecondary Programs by type of Program (2016/17 to 2029/30) – High Enrollment Scenario

| High School French-Language Program | Recent Graduates Enrollment in French-Language Universities (2016/17 to 2029/30) | Recent Graduates Enrollment in French-Language College & Institutes (2016/17 to 2029/30) | Recent Graduates Enrollment in French-Language Post-secondary Education (2016/17 to 2029/30) |
|---|--|--|--|
| Official Language Programming for the Linguistic Minority (OLPLM) | 4,252 | 2,289 | 6,541 |
| French Immersion | 462 | 249 | 710 |
| Total | 4,713 | 2,538 | 7,251 |

Source: Estimate based on BC Transition rates, Ontario Ministry of Finance population projection, and Statistics Canada data.

High school graduates are mobile in their choice of pursuing postsecondary education within the province of Ontario. It is assumed that 5% of youth inside the catchment area move away for their postsecondary education. As well, it is assumed that 10% of youth outside the catchment area to migrate to the catchment area for their postsecondary education. These estimates utilized the base case scenario estimates for youth's interest in a French-language postsecondary institution (13% for FSB, and 1% for ESB). In total, it is estimated that 363 students would attend a French-language postsecondary institution to migrate out of the catchment area, and 1,249 to migrate into the catchment area.¹⁰⁰ The following table (Table 4-15) summarizes the in-migration and out-migration of students that would have direct entry into a French-language postsecondary program.

Table 4-15: Estimated Number of CSW Ontario High School Graduates In-Migrate and Out-Migrate from the Catchment area for Direct Entry to a French-Language Postsecondary Program by type of Program (2016/17 to 2029/30)

| High School French-Language Program | In-Migration of Recent Graduates for French-Language Post-secondary Education (2016/17 to 2029/30) | Out-Migration of Recent Graduates for French-Language Post-secondary Education (2016/17 to 2029/30) | Net In-Migration (2016/17 to 2029/30) |
|---|--|---|---------------------------------------|
| Official Language Programming for the Linguistic Minority (OLPLM) | 1,233 | 327 | 906 |
| French Immersion | 16 | 36 | -19 |
| Total | 1,249 | 363 | 887 |

Please note that totals may not sum due to rounding.

Source: Estimate based on BC Transition rates, Ontario Ministry of Finance population projection, and Statistics Canada data.

¹⁰⁰ Due to the assumptions utilized in the calculation of students Official Language Programming and French Immersion; characteristics of students outside of the catchment area are identical to those inside.

The total estimated supply of Ontario Youth for a French-language institution in CSW Ontario can be estimated based on the number of youth with a preference for a French-language postsecondary institution, and the net migration into CSW Ontario. Under the base case scenario (low/best guess estimate) the total number of youth is estimated to be 2,092. The high enrollment scenario (high estimate) is 8,138 Ontario youth. The following table (Table 4-16) summarizes the number of youth by French-language high school program for both scenarios.

Table 4-16: Estimated Demand for a French-Language Postsecondary Program in CSW Ontario by Type of High School French-Language Program (2016/17 to 2029/30)

| High School French-Language Program | Number of Youth in Base Case Scenario (2016/17 to 2029/30) | Number of Youth in High Enrollment Scenario (2016/17 to 2029/30) |
|---|--|--|
| Official Language Programming for the Linguistic Minority (OLPLM) | 1,756 | 7,447 |
| French Immersion | 336 | 691 |
| Total | 2,092 | 8,138 |

Source: Estimate based on BC Transition rates, Ontario Ministry of Finance population projection, and Statistics Canada data.

The Campus Sud-Ouest (2015) study found that the demand for a French-language university from youth enrolled in a FSBs in CSW Ontario was low.¹⁰¹ The estimation of potential enrollment in a French-language University for the most popular programs was, on average, under 30 potential student enrollment per year.¹⁰² The base case scenario estimates for this study identified 86 potential student enrollment per year on average, while the high enrollment scenario estimates 518 students per year. However, it would be risky to compare these results with our estimation of the demand for a French-language postsecondary institution. Our estimation not only takes into account the number of students graduating from a FSB, but also a percentage (1%) of students graduating from ESB, as well as those enrolling in other postsecondary institutions. In addition, the campus Sud-Ouest (2015) estimation is divided by a field of study, based on data from a question asking about preferred field of study where respondent could choose more than one discipline. Without the original data set it is not possible to reconcile the differences in findings between the two studies.

4.4.1.2 Adult Learners

Another source of students for a French-language postsecondary institution would be adult learners.¹⁰³ Adult learners accounted for one-eight (13%) of enrolments in Ontario

¹⁰¹ Source: Recherche Institutionnelle et planification, Université d'Ottawa, Campus Sud-Ouest: Analyse des résultats de l'enquête sur la mobilité étudiante et les préférences, 26 Juin 2015, p. 33

¹⁰² Estimation of the number of potential inscription per year by fields of study: 33 in science, 22 in education, 20 in health sciences, 20 in arts and 16 in social science.

¹⁰³ Adults are defined as individuals age 25 to 64.

undergraduate programs in the 2014-15 school year.¹⁰⁴ As well, adult learners make up one-third (34%) of individuals enrolled in Ontario's career, technical or professional training programs.¹⁰⁵ The number of adult learners is estimated based off of current enrolment figures of adult learners, and projected over the study time period based on the MOF population growth rate of individuals 25 to 64.

In 2015 there are reported to be 134,826 adult learners in Ontario, of which 2,400 are estimated to be Francophone.¹⁰⁶ Scaling this to CSW Ontario produces an estimate of 109,428 adult learners in Ontario, with 1,981 estimated to be Francophone.¹⁰⁷ The number of adult learners is projected to grow based on the population growth rate of adults ages 25 to 64 from 2016/17 to 2029/30 (please see Technical Appendix).¹⁰⁸ Over the fourteen years it is estimated that 29,499 Francophone adult learners would be available for enrollment in a French-language postsecondary program.

Table 4-17: Estimated Demand of Adult Learners for a French-Language Postsecondary Program (2016/17 to 2029/30)

| School Year | Number of Students |
|--------------------|--------------------|
| 2016/17 | 2,005 |
| 2017/18 to 2019/20 | 6,146 |
| 2020/21 to 2029/30 | 21,348 |
| Total | 29,499 |

Source: Statistics Canada. Table 477-0033 - Postsecondary enrolments, by program type, credential type, age groups, registration status and sex, annual (number) (accessed: March 19, 2017).

4.4.1.3 Students Transferring from other Ontario Postsecondary Institutions

A third feeder for a French-language postsecondary institution is that of students transferring from other Ontario institutions. In interviews with postsecondary students they expressed interest in transferring to a French-language institution from other English and bilingual institutions. However, they were not queried as to how many would be interested in transferring. In 2014/15, there are estimated to be 11,987 Francophone students attending career, technical or professional training programs, and undergraduate programs.¹⁰⁹ The number of these students that would transfer to a French-language institution is currently unknown. However, some could be assumed to be interested in a

¹⁰⁴ Source: Statistics Canada. Table 477-0033 - Postsecondary enrolments, by program type, credential type, age groups, registration status and sex, annual (number) (accessed: March 19, 2017).

¹⁰⁵ Ibid.

¹⁰⁶ The estimation for number of Francophone is calculated using the incidence rate of Francophones within the province of Ontario (1.8%).

¹⁰⁷ Assuming that adult learners are equally distributed across Ontario, and that CSW Ontario accounts for 81.2% of all adult learners.

¹⁰⁸ Source: Ministry of Finance Information Centre. Ontario Population Projections Update, 2015-2041. Spring 2016. <http://www.fin.gov.on.ca/en/economy/demographics/projections/index.html>

¹⁰⁹ Source: Statistics Canada. Table 477-0033 - Postsecondary enrolments, by program type, credential type, age groups, registration status and sex, annual (number) (accessed: March 19, 2017).

French-language institution. It is assumed that 1,000 students would transfer in the first year the French-language postsecondary institution is launched, 800 in the second year, and 400 in the last year (Table 4-18). In total these 2,200 students represent 18.4% of all current Francophone post-secondary students (career, technical or professional training students, and undergraduate students).

Table 4-18: Estimated Number of Students Transferring from other Postsecondary Institutions to the French-Language institution (2016/17 to 2029/30)

| Year | Number of Transfer Students |
|--------------|-----------------------------|
| 2016/17 | 1,000 |
| 2017/18 | 800 |
| 2018/19 | 400 |
| Total | 2,200 |

4.4.1.4 International Students

The fourth source of demand for a French-language institution is expected to come from foreigners seeking a postsecondary education in Canada. Approximately 43.8% of foreigners obtaining permits (i.e., study permit holders) choose to study in Ontario as opposed to other provinces in Canada.¹¹⁰ This includes individuals from over 182 countries choose to study in Ontario. The estimation in number of international students that would be interested in a French-language postsecondary education is based on historic trends.

Study permit holders from countries where French is an official language are assumed to constitute the population of individuals who would be interested in a French-language institution. Between 2004 and 2015, 2.1% of study permit holders (on average) were for individuals from countries that have French as an official language.¹¹¹ The number of study permit holders from French-language countries has grown from 930 in 2004 to 1,900 in 2015. The number of study permit holders from French-language countries was found to be increasing at a predictable rate over time.¹¹² Between 2016 and 2029 it is estimated that a total of 32,621 study permit holders from French-language countries will attend an educational institution in Ontario.^{113,114}

¹¹⁰ Source: Immigration, Refugees and Citizenship Canada. Study Permit Holders by Province/Territory of Destination, Country of Citizenship and Year in which Permit(s) became effective, 2004-March 2016. (database). (accessed: March 19, 2017)

¹¹¹ Ibid.

¹¹² A simple linear regression was calculated to predict the number of French-language study permit holders in Ontario over time (2004 to 2015). A significant regression equation was found ($\alpha=796.67$, $t(10)=14.210$, $p<.01$; $\beta=82.89$, $t(10)=10.880$, $p<.01$) ($F(1,10) = 118.384$ $p < .000$), with an R^2 of .960.

¹¹³ Assuming a constant rate of increase in study permit holders between 2016 and 2029.

¹¹⁴ Study permit holders are assumed to register in the fall session of the academic year they obtain their study permit (i.e., a 2014 study permit holder is assumed to enroll in the 2014/15 school year).

Not all study permit holders pursue an education at a postsecondary institution. Study permit holders can attend elementary, secondary, and postsecondary institutions. However, between 2004 and 2015 the vast majority (average of 93.9%) of study permit holders are over the age of 14.¹¹⁵ As a result, it is estimated that of the 32,621 study permit holders from French-language countries, 30,637 will attend a postsecondary institution in Ontario.

In 2015 there were 18,535 study permit holders from countries that have French as an official language.¹¹⁶ The majority of these students (79%) attend institutions in Quebec, and are citizens of France (64%). The study permit holders currently attending institutions in Ontario are primarily from France (21% of student permit holders in Ontario) and Cameroon (12%). Ontario is the second most popular choice of citizens of France (10% of France citizens with study permits) for where to obtain a postsecondary education in Canada. In addition Ontario is a popular choice for people from Burundi (39% of Burundi study permit holders attend institutions in Ottawa), Rwanda (36%) and the Republic of Togo (24%). Ontario has the potential to attract a larger share of these country's students through the promotion of institutions and the tailoring of programming to make it more attractive to international students. Key informant interviews suggest that most newcomer learners and likely international students would prefer pursuing a French-language postsecondary education in an English learning environment like Ontario (see section 4.1.2 and 4.1.3).

As highlighted in the table below (Table 4-19), two alternative scenarios for international students. Under the base case, a steady growth rate is assumed in the number of international students coming to Ontario. The number of international students was then scaled, and used to estimate those who would come to a French-language institution in CSW Ontario. Under the high demand scenario, we assume that the establishment of a major French-language institution in CSW Ontario would result in an increase in international students coming to Ontario to study at a French-language postsecondary institution. We have therefore increased the number of students by 10%.

Table 4-19: Estimated Demand of International Students for a French-Language Postsecondary Program (2016/17 to 2029/30)

| | Number of Students |
|---|--------------------|
| International Students - Base Case Scenario | 30,637 |
| International Students - High Enrollment Scenario | 33,701 |

Source: Estimate based on Immigration, Refugees and Citizenship Canada data.

4.4.1.5 Student Demand for a French-Language Postsecondary Institution

The overall student demand for a French-language postsecondary institution is computed using the combined demand of the above four pools of students. The demand is projected over the study period by adding each demand element together. The youth and

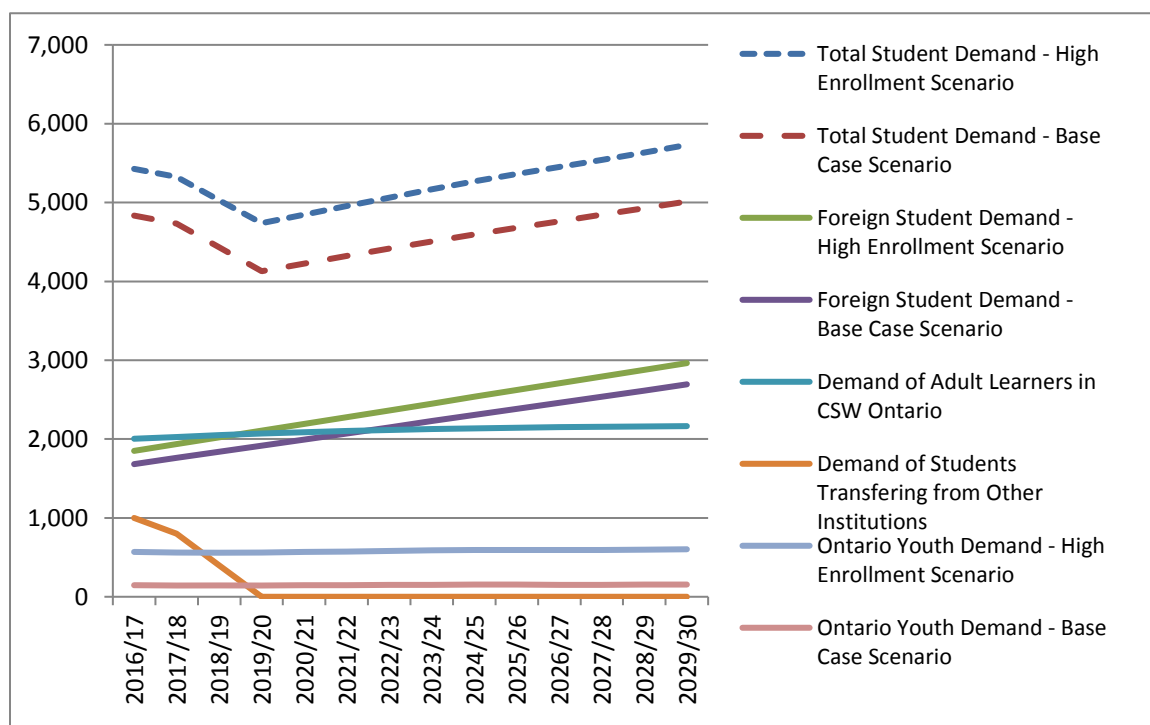
¹¹⁵ Source: Immigration, Refugees and Citizenship Canada. 2016. International students with a valid permit on December 31st by gender and age. (database). (accessed: March 25, 2017).

¹¹⁶ Source: Immigration, Refugees and Citizenship Canada, Temporary Residents as of March 31, 2016.

international student projections each have two projections; a base case and high demand scenario. For simplicity sake only two projections are made for all four sources; the base scenario and high demand scenario. This will create an upper and lower range for the projection of a potential pool of students for a French-language postsecondary institution in CSW Ontario.

From the four sources of students outlined above (Ontario youth, adult learners, postsecondary students, and foreign students) it is estimated that between 2016/17 and 2029/30 that there will be between 64,428 and 73,538 individuals interested in attending a French-language postsecondary institution in CSW Ontario. The vast majority of the pool of individuals for a French-language postsecondary institution is from domestic sources (55.2% base case scenario; 58.8% high enrollment scenario). However, international students make up an important segment of students for a French-language institution. International students account for up to two-fifths (41.2% to 44.8%) of individuals under the base case and high demand scenario, respectively. The following figure (Figure 4-2) depicts the year-over-year demand for a French-language institution from the three sources of demand.

Figure 4-2: Student Demand for a French-Language Postsecondary Institution (2016/17 to 2029/30)



Source: Estimate based on BC Transition rates, Ontario Ministry of Finance population projection, Immigration, Refugees and Citizenship Canada data, and Statistics Canada data.
Please see tables: Table 4-16, Table 4-17, and Table 4-19

4.4.1.6 Potential Number of FSPSG

This section explores the next step of the supply component of the market analysis; the conversion of postsecondary students into postsecondary graduates. This section pulls

together enrolment figures from the previous section (section 4.4.1.5) to determine the number of postsecondary graduates. Postsecondary graduates are projected based on the expected duration of the program, and graduation rates from postsecondary programs.

The estimation of program duration is based on historic data on how long it takes for a student to complete their program, and historic data on postsecondary graduation rates. The projection begins with the cohort graduating from the 2016/17 school year, and ends with the cohort graduating in the 2029/30 school year. Duration of program and graduation rates are assumed to be constant across all types of students (Ontario high school graduates, adult learners, international students, inter-institution transfer).

Postsecondary graduation rates are calculated based on the proportion of individuals enrolled at universities and colleges, and the graduation rate for universities and colleges. The majority (66.1%) of postsecondary enrolments were at universities.^{117, 118} The Ontario university graduation rate for undergraduate degrees is 77.6% seven years after enrolment (2004 cohort graduating in 2011).^{119,120} The Ontario college graduation rate was 66.7% in 2014-15.¹²¹ It is estimated that the postsecondary graduation rate is 73.9%.

The time it takes to complete a postsecondary program is dependent on the type of institution attended, as well as the type of education sought. Postsecondary institutions include both universities and colleges, and colleges can offer a variety of different types of educations (e.g., certificate, diploma, degree, etc.). The estimation of demand for a French-language postsecondary education is not divided by those pursuing an education at a university or college, but postsecondary in general. As a result the duration of the program and graduation rates is calculated using weighted averages for program duration and enrolment rates for universities and colleges.

The duration of an educational program for universities and colleges are of different lengths, and measured at different points in time. The university graduation rate is measured at seven years after enrolment, and the college graduation rate is reported in aggregate at the time of program completion. The duration of college programs ranges from one year for a certificate to four years for a degree. The duration for postsecondary

¹¹⁷ Five year average (2010/11 to 2014/15)

¹¹⁸ Source: Statistics Canada. Table 477-0033 - Postsecondary enrolments, by program type, credential type, age groups, registration status and sex, annual (number) (accessed: March 19, 2017)

¹¹⁹ Source: Council of Ontario Universities. 2014 Common University Data Ontario. Online article available at: <http://cou.on.ca/numbers/cudo/>. Last accessed: April 15, 2017.

¹²⁰ Average graduation rate was calculated using available CUDO data for Key Performance Indicators, Degree Completion Rate for Undergraduate Cohort. Where possible the Fall 2004 Cohort Graduation Rate 2012 was used. Cases where Fall 2004 data was unavailable Fall 2003 or Fall 2005 was used.

¹²¹ Source: Colleges Ontario. Student and Graduate Profiles: Environmental Scan 2015. Online article available at: http://www.collegesontario.org/research/2015_Environmental_Scan/CO_EnvScan_15_Student&GradProfiles_WEB.pdf

programs is calculated based on the weighted proportion of individuals enrolled at universities and colleges, as well as by the expected length of the program. The weighted average duration for a college graduate is estimated to be 1.9 years.¹²² University graduation rates are calculated seven years after programs have begun. Coupling the program durations for universities and colleges with two-thirds (66.1%)¹²³ of postsecondary enrolments at universities, the average program duration is estimated to be 5 years (5.3, rounded down).

The modeling of graduates begins with the 2011/12 cohort. The 2011/12 cohort is expected to have graduates in 2016/17 (based on the estimated 5 year program duration). The model adopts the baseline and high enrollment scenarios previously estimated for Ontario youth, and international students.¹²⁴ The high enrollment scenario estimates that between 2016/17 and 2029/30 that there could be 49,212 French-language postsecondary graduates. The estimation of number of graduates under the base case scenario is markedly lower than the high scenario, estimating that there will be 42,856 French-language postsecondary graduates produced between 2106/17 and 2029/30. The following two tables (Table 4-20 and Table 4-21) summarize base and high demand scenario for the number of FSPSGs in 2016/17, between 2017/18 and 2019/20, and between 2020/21 and 2029/30. The students transferring to the French-language institution are assumed to be transferring to the French-language institution for their third year (assuming they have the same five year graduation rate as the other groups). The following figure (Figure 4-3) plots the number of FSPSGs of the population in the study area from 2017/18 to 2029/30.

Table 4-20: Estimated Number of French-speaking Postsecondary Graduates – Base Case Scenario (2016/17 to 2029/30)

| | 2016/17 | 2017/18 to 2019/20 | 2020/21 to 29/30 | Total |
|--|--------------|--------------------|------------------|---------------|
| CSW Youth - Base Case Scenario | 109 | 339 | 1,090 | 1,538 |
| Adult Learners | 1,347 | 4,180 | 15,309 | 20,836 |
| Study Permit Holders - Base Case Scenario | 944 | 3,326 | 14,586 | 18,856 |
| Transfer of Students from Other Institutions | 0 | 739 | 887 | 1,627 |
| Total | 2,400 | 8,585 | 31,872 | 42,856 |
| Cumulative Total | 2,400 | 10,985 | 42,856 | |

Source: Estimate based on BC High School Transition rates, Council of Ontario Universities and Colleges Ontario graduation rates, Ontario Ministry of Finance population projection, Immigration, Refugees and Citizenship Canada study permit holder data, and Statistics Canada data.

Please see Table 4-16, Table 4-17, Table 4-18, and Table 4-19.

¹²² Source: Colleges Ontario. Student and Graduate Profiles: Environmental Scan 2015. Online article available at:

http://www.collegesontario.org/research/2015_Environmental_Scan/CO_EnvScan_15_Student&GradProfiles_WEB.pdf

¹²³ Traditionally implies the five year average (2010/11 to 2014/15).

¹²⁴ Adult learners and transfer students are included in both the base scenario and high enrollment scenario at a flat rate.

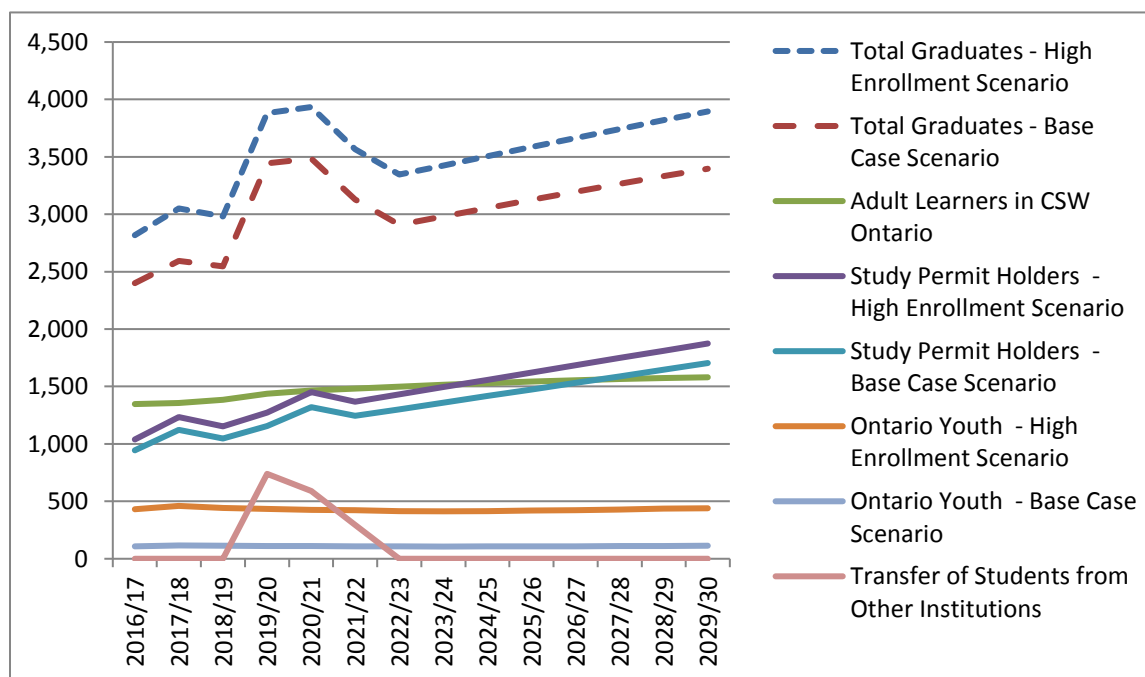
Table 4-21: Estimated Number of French-speaking Postsecondary Graduates – High Enrollment Scenario (2016/17 to 2029/30)

| | 2016/17 | 2017/18 to 2019/20 | 2020/21 to 29/30 | Total |
|---|--------------|--------------------|------------------|---------------|
| CSW Youth - High Enrollment Scenario | 432 | 1,336 | 4,241 | 6,009 |
| Adult Learners | 1,347 | 4,180 | 15,309 | 20,836 |
| Study Permit Holders - High Enrollment Scenario | 1,039 | 3,659 | 16,044 | 20,742 |
| Transfer of Students from Other Institutions | 0 | 739 | 887 | 1,627 |
| Total | 2,818 | 9,914 | 36,481 | 49,212 |
| Cumulative Total | 2,818 | 12,731 | 49,212 | |

Source: Estimate based on BC High School Transition rates, Council of Ontario Universities and Colleges Ontario graduation rates, Ontario Ministry of Finance population projection, Immigration, Refugees and Citizenship Canada study permit holder data, and Statistics Canada data.

Please see Table 4-16, Table 4-17, Table 4-18, and Table 4-19.

Figure 4-3: Projection of French-Speaking Postsecondary Graduates



Source: Estimate based on BC High School Transition rates, Council of Ontario Universities and Colleges Ontario graduation rates, Ontario Ministry of Finance population projection, Immigration, Refugees and Citizenship Canada study permit holder data, and Statistics Canada data.

Please see tables: Table 4-20 and Table 4-21.

4.4.2 The supply of postsecondary institutions to meet demand

Within Ontario there are two French-language colleges, and nine French-language and bilingual institutions. At the time of the writing of this report no figures were available for their capacity to provide French-language programming. However, it is estimated that in 2016 there were 24,474 individuals attending Ontario postsecondary institutions who

identify their mother language as French.¹²⁵ This number however only represents students who have self-identified as French and does not provide insight into the number of Anglophones pursuing a French-language education.

4.4.3 Comparison between supply of French-speaking graduates and the demand of employers in CSW Ontario

A key element of the research was to establish the extent to which the establishment of a French-language postsecondary institution would:

- A. Have sufficient demand (e.g., enrollment) to justify the establishment of such an institution would, and
- B. Whether the labour market in Ontario could absorb the potential number of graduates from such an institution.

It should be emphasized that while the study drew on several data sources, it is best to analyze this "supply-demand" problem in terms of possible ranges. In this context, data is presented under two possible scenarios: the base case and the high demand scenario.

The first scenario, the base case, is based on current projection of CSW Ontario youth's preference for a hypothetical French-language postsecondary institution. The base case follows current trends in youth moving away from French-language education when they transition to secondary school, and to Grade 12. The student survey provided estimates for the proportion of students graduating from FSB and ESB that would be interested in pursuing a French-language postsecondary education. Students reported that only a portion (13%) of FSB high school graduates that will pursue a postsecondary education will choose a French-language institution. The scenario also assumes that very few (1%) youth graduating from an ESB would pursue a postsecondary education at a French-language institution. As well, the base case assumes that international students from countries where French is an official language would be interested in pursuing their postsecondary education at a French-language school board. Further, international students were assumed to follow historical projections for the number of international students enrolling in postsecondary programs in Ontario.

The second scenario, the high enrollment scenario, is based on the assumption that youth attending high school in FSB are more likely to continue to pursue a French only postsecondary pathway than what was reported in the secondary student survey. Limits to the self-administered survey and lack of alignment between student preferences and student intentions to pursue PSE in French suggest this assumption to be credible. As such, all youth graduating high school from a FSB who will pursue a postsecondary education are assumed to choose a French-language institution. Further, it is assumed that with the accessibility of a French only university in CSW Ontario, high school students graduating from French Immersion programs in ESB would be twice as likely to attend a French-

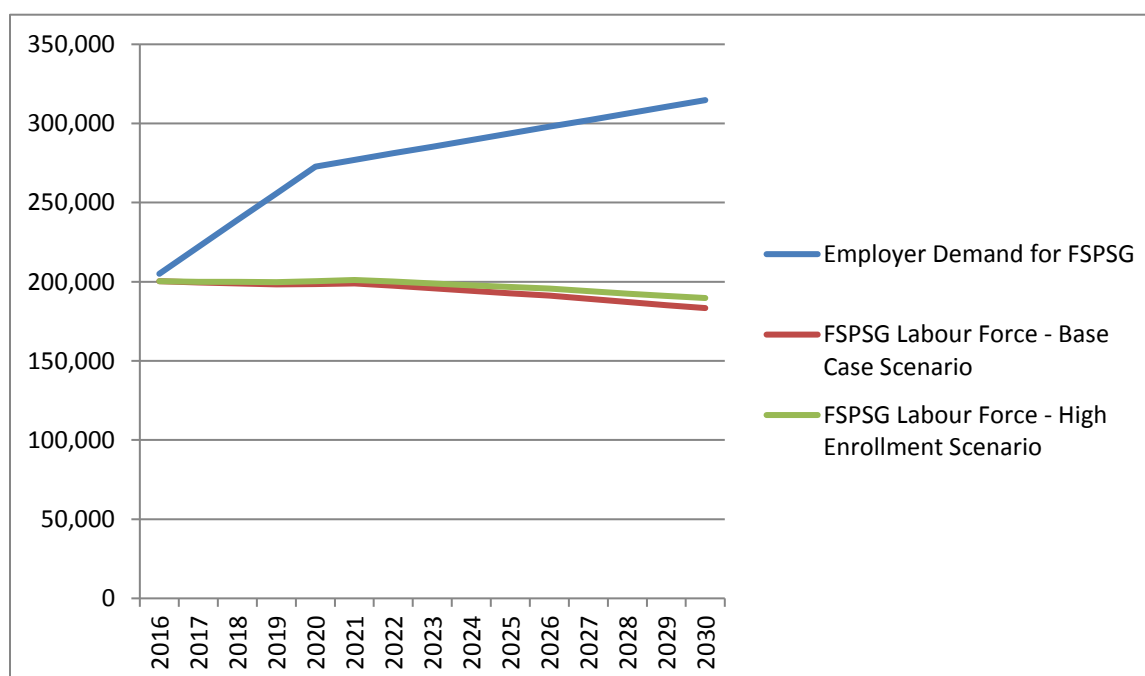
¹²⁵ Source: Ontario Ministry of Education (unpublished).

language institution as what was estimated in the base case scenario given that the institution is a reality. International student choice in where they pursue a French-language education in Canada is also assumed to be influenced by the presence of the French-language institution, increasing the number of Francophone international students attending postsecondary in Ontario by 10%.

The gap analysis is comprised of three components; the demand for FSPSGs, the loss of FSPSGs due to retirement, and the new graduates from French-language postsecondary institutions. Employer demand for FSPSGs is estimated to result in 109,722 FSPSG positions being created. There are also estimated to be 4,670 current (2017) FSPSG positions vacant. Further, it is assumed that 59,834 FSPSGs will retire between 2017 and 2030. As a result, by 2030 there will be 174,226 positions needing to be filled by FSPSGs.

The supply of FSPSGs is examined along the two scenarios; the base case, and high enrollment scenario. The base case scenario estimates that there will be 42,856 FSPSGs entering the workforce by 2030. The high enrollment scenario for supply of FSPSGs estimates that there will be 49,212 FSPSGs entering into the workforce by 2030. The increase in demand, and retirement of workers, is markedly greater than the supply of FSPSGs under both scenarios. The base scenario is estimated to result in 131,370 FSPSG positions remaining unfilled by 2030. While the high enrollment scenario is estimated to result in 125,014 FSPSG positions remaining unfilled. The following figure (Figure 4-4) illustrates the projected growth in demand of FSPSGs, the projected FSPSGs in the labour force under the base case, and the projected FSPSG in the labour force under the high enrollment scenario.

Figure 4-4: Comparison Between Supply of French-speaking Postsecondary Graduates and Employer's Demand for French-speaking Postsecondary Graduates



4.4.4 Conclusions

The gap analysis indicates that a sizable number of FSPSG positions are expected to be created by 2030. However, the number of FSPSG positions created is estimated to be much greater than the number of FPSPGs completing their education by 2030. The retirement of workers and their replacement with new graduates falls short of employer projected demand. The base case scenario of new graduates is insufficient to maintain the current status quo of FSPSGs in CSW Ontario, only addressing one-quarter (24.6%) of the open positions. The high enrollment scenario is capable of addressing the majority of positions vacated due to retirement (82.2%); however, it too fails to come close to the demand of employers for FSPSGs only filling one-third of FSPSG positions (28.5%). The introduction of a French-language postsecondary institution in Ontario has the potential to significantly increase the number of individuals attracted to a French-language postsecondary institution. However, this research study did not explore the influencing power of a proposed institution.

One important distinction for the market analysis is the potential disconnect between an employer's definition of a French-speaking postsecondary graduate, and the narrow definition applied to the supply of French-speaking postsecondary graduates. Employers' requirement for employees' ability to speak French may be less than the fluency requirement of the supply of students. Nor does the assumption of employers' demand require the postsecondary education to be in French. The disconnect has the potential to result in a larger pool of individuals available to fill employers' hiring needs beyond those identified within this report. However, the students identified to be French-speaking postsecondary graduates more closely matches those that would be interested in pursuing a postsecondary education at a French-language postsecondary institution.

The ability of existing postsecondary institutions to facilitate these youth in obtaining a French-language postsecondary education in their program of interest in a timely way is unknown. Qualitative research findings with students attending postsecondary institutions call into question the ability of existing institutions to meet their needs in terms of quality and access to French-language courses (see Section 4.1.3 of this report). Additional research is required to determine the current capacity of Ontario postsecondary institutions to adequately meet student demand for a French-language postsecondary education. It is recommended that a detailed examination of existing postsecondary institutions to be conducted in order to determine the ability of such institutions to meet demand.

4.5 Analysis Summary

Potential enrollment in a proposed French-language postsecondary institution is projected to attract between 3,061 and 3,515 students per year. However, it should be recognized that only a portion of such students will be recent graduates transitioning from high school to the institution.

The projected enrollment suggests that estimates be made for several key source populations, namely adult learners and international students. For the purpose of this study, we estimated potential enrollment to be consistent with the CSW's current share of such learners. This likely underestimates the appeal of a French only university currently unavailable in CSW Ontario.

Sensitivity analysis suggests that with different assumptions there can be a sizable change in expected enrollment.

Analysis of the demand for French speaking workers suggests that the Ontario job market will have no issues in terms of absorbing larger numbers of French speaking graduates that will occur should a French-language university be established.

Anecdotal data suggests that the establishment of a French-language university may have some adverse effects on existing Ontario French/bilingual postsecondary institutions. It is estimated that upon establishment of a French-language university in the CSW, a number of students enrolled in other French/bilingual institution will transfer to the new institution. This transfer of students is likely to improve labour market outcomes of Francophone students said to be struggling to complete their PSE within standard timelines.

The estimated supply and demand calculations represent the "best estimate" to likely enroll in a French only postsecondary institution given the very compressed time in which the consultant had to complete the study and limited ability to conduct research with important source populations such as French speaking adults (for re-training aspirations) as well as the views of international students.