

## Environmental Scan Series.4

# Regional Demographics and Population Trends

Although regional demographics and population trends are not a [STEEP sphere](#), an examination of population trends is essential to understanding the external forces that are influencing (and are themselves influenced by) higher education. In 2018, Canada saw the single-largest jump in population in almost fifty years (0.5% growth in three months).<sup>1</sup> The BC population has been growing as well, and is projected to have the second-highest growth in the country over the next 20 years (by province, after Alberta).<sup>2</sup> BC's total population exceeded five million in 2018, and is projected to grow to over six million in 2041.<sup>3,4</sup> While the population is growing, it is also changing in composition. This report addresses four major trends driving this change: British Columbians (as a whole) are getting older; the population of domestic individuals of traditional post-secondary education age ('TPSE-age'; 15 to 24) is decreasing; the population of Indigenous people is young, and growing; and international migrants are streaming into the province in search of work, education, and permanent residency.

### British Columbians are Getting Older

In general, the growing BC population is also an aging population.<sup>4</sup> One-fifth of British Columbians are aged 65 and older (traditional retirement age 'TR-age'), and the last census (2016) showed the largest increase in the share of seniors since confederation.<sup>5-7</sup> The TR-age cohort is projected to grow by more than 75%, to over 1.6 million, by the year 2041 (which will be more than one quarter of the province at that time).<sup>4</sup> This top-heavy 2041 population pyramid includes growth of only 3% for those aged 15 to 24 (TPSE-age), and moderate growth of 36% for those aged 40 to 54.<sup>7</sup> BC post-secondary institutions will continue to face an increasingly-challenging domestic recruitment scenario, wherein traditional sources of students and traditional delivery models are no longer sustainable.

The effects of an aging population are also described in the previous three Environmental Scan chapters. For example, [Chapter 3 Labour Market Outlook](#) observes that employers are struggling to find and retain employees that have the right skill set; a high participation rate and employment opportunities for older workers suggests that the demand for re-skilling opportunities will increase. About half of all TRU students are currently studying

### British Columbians are Getting Older

Traditional retirement age group (65+) will grow by 75% in the next 20 years. Demand for human service and healthcare education will increase as the population ages.

### Slow Local Growth

The Thompson Rivers college region will see half the annual population growth rate of the total BC population (to 2041).

### Fewer High School Graduates

The 15-24 age group will decrease across the province, especially in the local region over the next 5 years.

### Indigenous Growth

Contrary to the overall trends, Indigenous people in BC are growing in number and are younger than average.

### International Migration

Many of the overall population increases (past and projected) are due to international immigrants seeking education, permanent residency, and employment.

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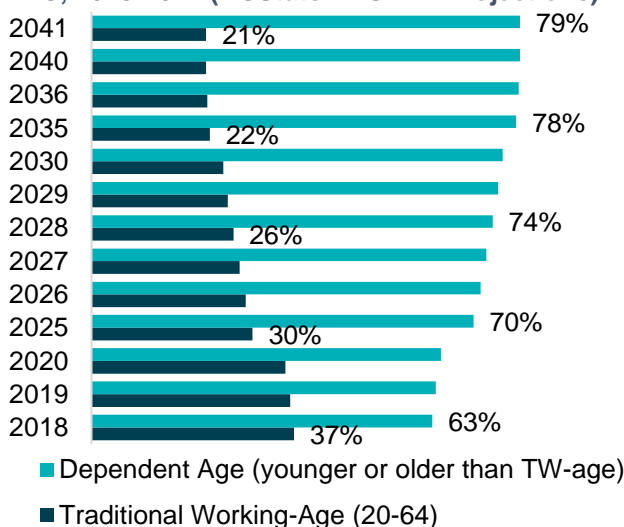
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through Open Learning delivery, and current trends suggest that there may be more opportunity to grow this branch (especially for older adults and in the subjects of technology skills, healthcare, and services). Flexible, customizable education options aimed at working and retired adults will become an even more important component of sustainable enrolment strategy.<sup>8</sup>

**A Growing Dependency Ratio**

BC’s traditional working-age group (‘TW-age’; 20 to 64) is shrinking as a share of the total population.<sup>4</sup> Currently, 63% of British Columbians are outside traditional working age (0-19 and 65+) and are therefore assumed to be dependent on the productivity of the other 37% (TW-age).<sup>4</sup> By 2041, a projected ratio of TW-age supporters to dependents will be 1:4 (with TR-age accounting for 2 or more of those 4 dependents).<sup>4</sup> The increasing dependency ratio poses real challenges for governments, which are drawing from a shrinking tax base while demand for the services funded by that tax base (particularly healthcare) is growing.<sup>5</sup>

**Figure 1. Distribution of Dependency Ratio Groups in BC, 2018-2041 (BCStats PEOPLE Projections)<sup>4</sup>**



As described in [Chapter 3 Labour Market Outlook](#), healthcare and essential services are going to be primary areas of education demand for the future workforce. With more than a quarter of the provincial population soon to be over the age of 65 and a dependency ratio of 1:4 by 2041, it will be important to address the changing demand for programming.<sup>4</sup>

**Slow Growth in the Local Region**

While BC is projected to grow by an average of 1% per year (to 2041), the Thompson Rivers ‘College Region’ is projected to grow by an average of only 0.5% per year.<sup>7</sup> In keeping with provincial trends, older age groups will increase more than younger age groups. The cohort of those aged 25 to 39 is projected to grow by over 7,000 people until 2027 (over 1% per year) after which considerable decline is expected (approximately -0.6% per year) until the end of the projection period (2041).<sup>7</sup> The greatest increase will be in the cohort of those aged 40 to 54, which is projected to increase by one fifth of its current population (at a rate of 1% per year) to the end of the projection period.<sup>7</sup> This would account for an increase of nearly 15,000 individuals.<sup>7</sup> The Kamloops/Thompson school district (SD73) area is projected to experience the greatest increase in the 40 to 54 cohort of all school district areas in the Thompson Rivers region, with a total increase in of 35% (or over 8,000 people) by 2041.<sup>7</sup> This trend is also described in [Chapter 2 Economic Outlook](#), which observed a slowdown in growth for the TPSE-age population; it also emphasized the need to provide flexible, part-time, digital and blended learning to support skill development for people working full-time.

Almost one-third of all TRU students (and half of those studying on campus) come from the

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Thompson Rivers college region.<sup>8</sup> The total population of the Thompson Rivers college region is projected to grow at an average rate of 0.5% per year to 2041 (about half the provincial average and much lower than the Douglas, Kwantlen, and Fraser Valley regions).<sup>7</sup> In real numbers, the total population of the Thompson Rivers college region is estimated to grow by about 20,000 people in the next 20 years, to just over 200,000 people.<sup>7</sup> A pocket of higher total population growth will occur in the local SD73 area (0.7% annual average).<sup>7</sup> Contrasting is the projected decline of the total population in the Cariboo-Chilcotin school district (SD27) area.<sup>7</sup> This area is not projected to experience any major growth overall, and the TPSE-age cohort is estimated to steadily decline by an average of -0.3% per year until 2041.<sup>7</sup> There may be a modest increase in adult learners over the next decade (approximately 50 people per year).<sup>7</sup>

### **PSE-Bound High School Grads: Fewer and Farther Between**

In the Thompson Rivers college region, the TPSE-age group is projected to decline over the next 20 years.<sup>7</sup> The greatest decline is estimated to take place over the next five years.<sup>7</sup> Incremental increases are expected by 2026.<sup>7</sup>

However, some school districts just outside the Thompson Rivers college region are projected to have a notable increase in TPSE-age persons, including: SD19 Revelstoke (2% average annual increase over the next 10 years and a 58% overall increase by 2041), SD83 Okanagan-Shuswap (2% average annual increase over the next 5 years and an 18% overall increase by 2041) and SD23 Central Okanagan (a modest first five years followed by a 1-2% average annual increase over the next

15 years and a 30% overall increase by 2041; 6,500 TPSE-age individuals).<sup>7</sup>

In addition to the overall age group, trends and projections in the number of Grade 12 students can help inform specific recruitment and transition strategies. The number of Grade 12 students in SD73 is projected to increase by an average of 1% per year until 2041 (95 students per year).<sup>9</sup> The most recent in-year projection is not in line with the overall trend: the district is expecting 237 more students (total) in September 2019 than the 40 students previously projected by the Ministry of Education.<sup>10</sup> As a major source of new TRU students, trends in local high school enrolments are closely monitored. High school to post-secondary transitions will be further examined in an upcoming chapter of this Environmental Scan Series.

### **A Young and Growing Indigenous Population**

Indigenous people (identified as “Aboriginal” by Statistics Canada) comprise approximately 6% of the BC population.<sup>11</sup> The majority of this group reported a single Aboriginal identity, with 64% identifying as First Nations, 33% as Métis and 1% as Inuit.<sup>11</sup> Over the last ten years, the Indigenous population grew three times faster than the total provincial population.<sup>12</sup> This robust growth was due in large part to high rates of fertility, and also an increasing willingness to identify as Aboriginal.<sup>12</sup>

In contrast to the overall aging trend, the Indigenous population in BC is younger.<sup>11</sup> The average age of Indigenous people in BC is 34, compared to 42 for other British Columbians.<sup>11</sup> This differential is most evident for those aged 0 to 24; 43% of the Indigenous population is less

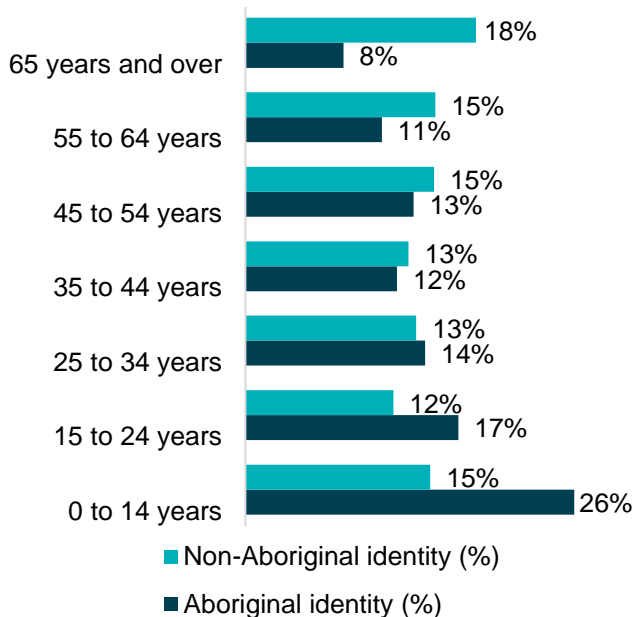
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than 25 years old, compared to only 26% of the non-Indigenous group.<sup>11</sup> Only 8% of Indigenous people are 65 years or over, compared to 18% (or one-fifth) for non-Indigenous people.<sup>11</sup> The dependency ratio, therefore, is driven mainly by the needs of children and youth.

The Kamloops census agglomeration area has the fourth-largest Indigenous population per capita (11% or 10,700 people) in the province (2016 Census).<sup>11</sup> In contrast to the general slowdown in domestic student recruitment potential in this area, BC post-secondary institutions will have the opportunity to provide educational opportunities for a large and growing group of Indigenous people.

**Figure 2. Comparison of Age Groups by Aboriginal Identity in BC (Statistics Canada 2016 Census)<sup>11</sup>**



## International Migration: Jobs and Permanent Residency Wanted

Canada's population growth is largely driven by international migration. An increase in refugee claimants and the arrival of a large number of non-permanent residents (many of whom are work- or study-permit holders) make up the migrant profile.<sup>6</sup> Many International students are seeking permanent residency, and are drawn to places of higher education with nearby career opportunities.<sup>13</sup>

These trends are amplified in BC, which offers a relatively navigable permanent residency program and an attractive labour market.<sup>13</sup> International students are able to enter BC's hospitality and sales industries and gain sponsorship from their employers, while others pursue education in Ontario and move to BC after graduation.<sup>13</sup> In 2018, net international migration accounted for a gain of almost 60,000 people in BC, far outweighing increases due to interprovincial migration (almost 4,000 people) and natural increases (births; over 5,000 people).<sup>3</sup>

### Next in the Series

The next reports in the Envision TRU Environmental Scan series will focus on enrolment trends and student engagement.



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