



Huron
UNIVERSITY

How will Canada's cap on international students impact London's talent pipeline?

Governance, Leadership & Ethics (GLE) Policy Papers Series

GLE2010: Introduction to Public Policy
May 2025

Huron University is a tight-knit community with a 160-year legacy of creating distinct experiences to develop the next generation of Leaders with Heart. We prepare students for a world of possibilities and our alumni are proof of the successes we create as they leave our community with solid skills, a commitment to social responsibility and the potential for personal growth.

Huron's Governance, Leadership & Ethics (GLE) is a multi-disciplinary program is designed to help students fully grasp the challenges of contemporary governance and develop the know-how for leadership that is inclusive, accountable and effective.

Huron University is located on the traditional lands of the Anishinaabek, Haudenosaunee, Lūnaapéewak, and Attawandaron peoples, on lands connected with the London Township and Sombra Treaties of 1796 and the Dish with One Spoon Covenant Wampum. This land continues to be home to diverse Indigenous peoples whom we recognize as contemporary stewards of the land and vital contributors of our society.

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I wish to extend my gratitude to Dr. Kate Graham and all the students in GLE 2010, who were instrumental in producing this Policy Papers Series for the inaugural year of the ImpactLab London initiative. Who better than those that come to our city from near and far, who look to grow as leaders, to speak to the challenges and opportunities facing post-secondary graduates today – especially in the wake of the cap on international students. From analysis through to recommendations, what follows is an invaluable resource for the City of London to use as it seeks to retain the incredible talent that Huron University and London's other post-secondary institutions attract to our city.

Vicki Sweeney
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The academic mission of Huron University's Governance, Leadership and Ethics (GLE) program is two-fold: first to equip students with the multi-disciplinary knowledge required to understand the 21st century's most complex, urgent societal challenges, and second to create community-based learning partnerships where students put their ideas and skills to work for the common good. Through an innovative collaboration with ImpactLab London, Dr. Kate Graham and her 50 GLE2010 Public Policy students have truly "walked the talk", showing how integration of the GLE's scholarly and civic mission delivers high value across the classroom-community boundary. Through careful project design, judicious editorial guidance, and detailed sectoral research, Dr. Graham's Team have produced a multi-layered study of the impact of the federal international student visa cap on London's educational, economic, cultural, and social well-being. In the best tradition of public policy research, they have gone further to recommend evidence-based reforms and strategies. I congratulate ImpactLab London, Dr. Graham, and her students for their collective ingenuity in creating an exemplary undergraduate classroom learning experience and for their professionalism in delivering a public policy inventory addressing an urgent city and community priority.

Neil Bradford
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Students from the GLE2010: Introduction to Public Policy editorial team spoke at Huron's Centre for Undergraduate Research and Learning (CURL) conference in April 2025 about the class' ImpactLab project. The names of all 50 student contributors are listed on the screen behind the speakers.

Pictured from left to right: Dr. Kate Graham, Christian Kalbfleisch, Anusha Imam, Maryam Abouelela, Emily Morano and Isabella Caloura

Table of Contents

About ImpactLab London & GLE2010.....	3
Introduction	4
 PART I: THE CONTEXT	
Chapter 1: The Role of Students in London's Community and Economy	7
Chapter 2: A Changing Landscape for International Students	15
Chapter 3: An Expressivist Critique of International Student Visa Cap Policy	24
Chapter 4: Trends in International Enrollment	28
Chapter 5: London's Housing Strain History (and why the student cap won't fix it).....	39
 PART II: CASE STUDY EXAMINATIONS	
Chapter 6: Corporate Headquarters & Financial Services.....	46
Chapter 7: Advanced Manufacturing.....	55
Chapter 8: Non-Profit, Philanthropy, and Charitable Sector	67
Chapter 9: Early Childhood Education	77
Chapter 10: Transportation Industry.....	91
Chapter 11: Organized Sports.....	101
Chapter 12: Technology	112
Chapter 13: Hospitality and Tourism	133
 PART III: CONCLUSION	
Conclusion	145

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The following students were enrolled in GLE2010: Introduction to Public Policy Class (Winter 2025, taught by Dr. Kate Graham) and contributed to this volume.

Acknowledgement with gratitude is extended to these students for their contributions. The asterick (*) identifies students who served as student editors, supporting chapter authors in a resource and editorial review role.

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About ImpactLab London & GLE2010

By Maryam Abouelela & Isabella Caloura (student editors)

ImpactLab London is a partnership between the City of London and local post-secondary institutions: King's University College, Fanshawe College, Huron University and Western University. The goal of the ImpactLab initiative is to engage students in research and community problem-solving through experiential learning. Each year, the City of London identifies a new challenge and selects post-secondary classes to develop innovative solutions. The challenge selected by the City of London for 2025 is how to attract and retain talent in the city of London in light of the impact of the federal cap on international students' visas on the city's talent pipeline.

Our class, **GLE2010: Introduction to Public Policy**, is a part of the Huron's Governance, Leadership & Ethics Program (GLE) new public policy stream. Throughout the semester, our class engaged in key concepts related to public policy and the policy process, as well as applied policy evaluation. GLE2010 chose to examine **the impact of the recent federal cap on international student visas and its effects on London's talent pipeline**. From January to April, the class examined the effects of this policy change on specific programs' enrollment across London's post-secondary institutions. We had visiting guest speakers join our class to share varied perspectives on the topic, and educate our class on how federal policy changes were impacting London's post-secondary institutions and our community. We then focused on our own research projects: working in small teams to examine local impacts of the federal student cap in various ways.

This document presents our research and recommendations to support the City of London in understanding and responding to the local impacts of the international student visa cap; and, ultimately, to contribute to strengthening the city's talent pipeline and our community.

Introduction

By Ria Nayyar & Christian Kalbfleisch (student editors)

This publication is a culmination of a semester-long collaborative effort undertaken by Huron University's **GLE 2010: Introduction to Public Policy** class as a part of the Winter 2025 ImpactLab London Initiative. This term, this project has challenged students to critically examine the federal policy change capping international student visas and its effects on London's talent pipeline. The complex question researched was: **How will the recent cap on international student visas impact London's talent pipeline?**

To explore this question, the class of 50 undergraduate students from diverse academic backgrounds - Management and Organizational Studies, Political Science, Governance Leadership and Ethics, Economics, and History - worked together to produce this edited volume. This document includes several chapters, each offering unique perspectives on different industries that operate within London. Beginning with a foundational context about London's economy, Canada's immigration policy landscape, and recent enrollment trends at local institutions, the book is followed by sector-specific case studies. These specific studies will analyze how the talent pipeline is shifting in response to changing immigration policies, and how it will affect industries including but not limited to finance, hospitality and tourism, childcare, and manufacturing. The chapters will conclude with recommendations for stakeholders impacted by the policy changes.

Both quantitative and qualitative research is incorporated, including policy analysis and data interpretation. This work was supported by guest speakers, industry leaders and professionals, and editorial oversight from peers and faculty. Collectively, these chapters present an interdisciplinary view of how national immigration policies can alter the future of the local workforce, along with recommendations on how to mitigate and address the challenges ahead.

Background

In January 2024, the Federal Government made a decision to put a temporary two-year cap on new international student study permits to address housing shortages and infrastructure strain. This public policy limits study permits to ~360,000- a 35% reduction from the previous year. Followed by this, in 2025, the cap would be reduced by 10% to

~437,000 permits.¹ While the cause for the implementation came from a variety of factors, such as housing and infrastructure strain, exploitation by “bad actors,” unsustainable growth, economic, and labour market alignment, the effects on the greater London area have been immense.

Western University, one of London’s largest employers and a major hub for international students, reported a 15% drop in first-year international undergraduate enrollment, alongside a 10% decline in both master’s and doctoral programs. This downturn has serious financial implications, as international students pay considerably more in tuition than domestic students (approximately \$48,000 versus \$8,500 annually). With a domestic tuition freeze in place since 2019, international tuition revenue plays a critical role in sustaining institutional budgets. One visible outcome of this financial strain was the wave of strikes from Western University’s labour negotiations (teaching assistants and service workers) at the beginning of the 2025 school year.⁴ While the firm negotiation stance of the university may have not been directly related to the lost revenue from the recent student cap, this can potentially serve as a prelude to the future where there is potential for deferred capital investments, hiring freezes, reduced student services and layoffs.

The greater London area has historically/is currently seeing more brain drain than major cities - labour shortages and large skill gaps. Given this context, the federal cap on international students is likely to exacerbate these issues and affect multiple sectors across the region. Hence, it is clear this new public policy will have a dire impact on London, with major impacts on numerous sectors in the foreseeable future. The extent of these impacts and specifics will be analyzed and assessed thoroughly through a series of sector-specific case studies and policy analyses.

Process Overview and Key Learnings from Students Work

This publication reflects policy insights generated through research processes, along with the collaborative and logistical complexity of putting together a multi-authored academic volume. With around 45 contributing authors and seven editors, this project was closely monitored throughout the process, which mirrored the dynamics of larger-scale scientific, policy, and research development teams. Each editor was assigned a set of chapters to review, edit, and proofread- ensuring the accuracy of sources and statistics while maintaining overall coherence and consistency across the publication. Coordinating the work of such a diverse group presented challenges that extended beyond efficient writing and research skills, but rather clear communication, editorial consistency, and shared commitment to quality and cohesion.

Despite structured deadlines and editorial support, maintaining consistency required numerous rounds of edits which proved to be difficult due to the wide range of academic backgrounds, writing styles, and personal goals within the class. However, this diversity is what ultimately became the project's greatest strength. Interpretation variations of federal policies, especially regarding the student cap, allowed for a range of perspectives to emerge, all grounded in original research, lived experiences, and disciplinary knowledge.

The compilation of editing all chapters required ongoing collaboration, peer review, and project management- skills that are fundamental to all industries and careers, especially effective policy development. More importantly, the process reinforced a key insight: high quality work is rarely uniform, but rather thrives when multiple perspectives are brought to the table. Hence, the final product stands as a reflection of both research contribution and real-world policy development- demanding, confusing, exciting, but ultimately strengthened by the collective efforts of a team.

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CBC News. "Western University Support Staff Vote to Ratify Tentative Agreement." Last modified January 30, 2024. <https://www.cbc.ca/news/canada/london/western-strike-cupe-worker-ratification-vote-1.7351548>.



Part I: The Context



Chapter 1: The Role of Students in London's Community and Economy

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In London, Ontario, over 80,000 post-secondary students attend Western University and Fanshawe College each year. These students come from across Canada and around the world to pursue their education. Research demonstrates that the city has grown increasingly dependent on their presence and contributions, both economically and socially. Students are often viewed primarily through the lens of their role as learners; the role they play and the impact they make on London goes far beyond academic borders.

International and domestic students both influence shifts in the housing market, sustain local businesses, support public transportation systems, and resolve crucial labour shortages. These students and their activities serve as the building blocks for the entire London economy and lead to the spin-off effect of cultural diversification in the region. As London's population continues to grow, it is important to understand how post-secondary students will shape the city's future. This chapter will demonstrate how the student population impacts the city of London in four key aspects: housing, business, buying goods and services, transportation, and labor with employment opportunities. The data and literature from City of London suggest that students are far more than just transitory residents; they are, in fact, essential to the evolution of the city.

Housing: Affordability and the Student Effect

London's student population affects the housing market in both positive and negative ways. Over 80,000 students from Western University and Fanshawe College require rental accommodations every year, which places a significant strain on the available rental market in the city.¹ The search for student housing tends to be highly competitive, especially on or near busy transit routes or within walking distance of campus. These areas are commonly divided into five locations: Masonville, Main Gates, Downtown, Oxford-Wharncliffe and Sarnia-Wonderland. Tailored around the student-specific housing units, this competition has been a driving force behind increased rental rates alongside the construction of new units.

Despite a year-over-year drop of 3%, the average rent of a two-bedroom apartment in London reached \$2006 in February 2025, making it exceptionally expensive for students.² Even though these numbers could indicate a seasonal slowdown in the renting market, the high rates continue to be disproportionate to average earnings. For example, Ontario's minimum wage of \$16.55 makes it difficult for a student working 20-30 hours a week to balance their housing, tuition, transportation, and food expenses. In

¹ LEDC (London Economic Development Corporation). 2023. Employment Prospects 2023–2031. <https://www.ledc.com>.

² Nesto. 2025. "London Housing Market Outlook: March 2025." Nesto.ca. <https://www.nesto.ca/home-buying/london-housing-market-outlook/>.

a recent report, Statistics Canada estimated that 25-63% of international students in Canada lived in what they defined as “unsuitable housing” situations, which were likely overcrowded and lacking privacy or facilities.³ Ultimately, students are particularly vulnerable in fast-growing cities such as London, where the population is consistently outgrowing housing options; however, low-income Londoners are also affected as a result of this.⁴

Furthermore, international students face some unique challenges in terms of housing. Many arrive with limited cultural and language knowledge and may not speak the local language. In addition, they often lack access to provincial health care coverage, such as OHIP. Students usually depend on private landlords who, more often than not, fail to maintain adequate housing standards. The increase in the enrolment of international students has put even more strain on the housing supply, negatively impacting them and others looking for housing. From 2015 to 2020, London had a nearly eightfold inflow of non-permanent residents, among them international students. This trend has not been matched with investment in building new houses.⁵

Currently, the City of London is planning to create 3,000 affordable housing units before the end of 2026. Unfortunately, there are currently no requirements for new developments to include affordable housing units, allowing developers significant flexibility to exclude them. As a result, existing systems continue to fall short of meeting the growing demand for affordable housing, particularly among students and other low-income residents.⁶ There is an expectation to ease some of the pressure with the announcement of more than 1,000 new student housing spaces in London to create student housing spaces and the funding Ontario put forth.⁷ But, there is still a need for consistent focus to ensure that there is housing for the ever-growing number of students with Western University estimating that enrollment will hit 50,000 by 2030.⁸

In summary, students not only drive demand for residential housing in London for non-students, but they also face affordability challenges themselves that reflect broader social and economic issues. Their experiences show how a city in transition must balance development with inclusive and careful planning for all

³ StatCan (Statistics Canada). 2024. “International Students and Housing in Canada: A Municipal Perspective.” *StatCan Economic Insights*, January 2024. <https://www150.statcan.gc.ca>.

⁴ Moffatt, Mike. 2021. “Why Have London, ON Home Prices Been on Fire Since 2016? Population Growth.” *Medium*, March 7, 2021. <https://medium.com/@MikePMoffatt>.

⁵ Ibid.

⁶ Indiano, Ian. 2022. “The Quest for an Affordable Home in London.” *Interrobang*, March 11, 2022. <https://www.fsu.ca/interrobang/article/quest-for-affordable-home-london>.

⁷ Ontario Ministry of Colleges and Universities. 2024. “Ontario Helping to Create More Than 1,000 New Student Housing Spaces in London.” *News.Ontario.ca*, February 12, 2024. <https://news.ontario.ca/en/release/1004875/>.

⁸ Western USC. 2024. *Student Housing Policy Paper 2024*. <https://westernusc.ca/wp-content/uploads/2024/06/Student-Housing-Policy-Paper-2024.pdf>.

Businesses and Spending: Students are Drivers of Local Economic Growth

The existence of more than 80,000 post-secondary students in London, Ontario, significantly contributes to the city's economic development and sustainability. Students are major contributors to local expenditures, particularly in housing, food, entertainment, personal care, and other essential services. According to Western University's 2024 report on economic impacts, student living expenditures alone inject nearly \$293 million annually into London's economy.⁹ This level of spending is vital to the survival of many local businesses, especially those in retail trade, hospitality, and personal services, which often depend on student customers.

Students are also key drivers of development and vibrancy in London's commercial core. Recent downtown revitalization plans increasingly recognize the important role students play in supporting retail and dining in the area. Businesses that target students—such as cafés, fast-casual restaurants, clothing stores, and recreational venues—continually adapt their products and services to meet evolving student tastes. This community demand not only fosters economic sustainability but also stimulates creativity within the local market. For instance, the Downtown Community Improvement Plan (CIP) identifies students as active participants in local mobility and economic activities, especially within the areas surrounding Western University and Fanshawe College.¹⁰

Student-led economic engagement is also deeply tied to London's identity as a regional business and cultural hub. With over 20,000 businesses operating in the city, students represent not only a consistent market but also a valuable seasonal economic resource.¹¹ This cyclical pattern of spending, combined with the growing student population, promotes year-round economic activity and supports broader urban development goals, such as enhancing nightlife, improving public transportation, and upgrading infrastructure.

Overall, the economic impact of students in London extends beyond spending. Their presence actively shapes the city's business environment, fueling innovation and driving growth. Investing in the student population, therefore, is not only sound policy—it is a strategic approach to ensuring London's long-term economic resilience and vitality.

⁹ Western University. 2024. Economic Impact of Western University Students on the City of London. London, ON: Institutional Planning and Budgeting.

¹⁰ Downtown London. n.d. Downtown Community Improvement Plan (CIP). London, ON: City of London.

¹¹ Downtown London. 2021. Downtown London: Strategic Plan 2021–2025. London, ON: Downtown London BIA.

Transportation

Another sector that students heavily influence in London is transportation. London, Ontario is not only one of the largest cities in Western Ontario by population, it is also one of the largest cities geographically. The city of London spreads across 437.08 km² of Western Ontario. This creates the reality that London is not an accessible city by walking or biking; its' habitants have to rely on vehicles and forms of public transportation to best navigate the city. London's Public Transportation includes the London Transit Commission which is a series of bus routes located throughout the high traffic areas of the city.

Individuals between the ages of 18 and 25 hold the highest propensity for using the London Transit Commission out of all evaluated age demographics.¹² This directly aligns with the high volumes of post-secondary students that study in London each year (approximately 80,000 individuals). It was found in 2019 that over 11,400,000 rides were taken on the London Transit Commission annually, which accounts for over half of all trips taken within the London Transit Commission annually.¹³ This can be attributed to the fact that 55% of students claim they use London's bussing system as their primary mode of transportation while in London.¹⁴ Western University students also receive an annual bus pass with unlimited rides for a fixed rate included in their tuition. The high student ridership can be attributed to the accessibility this partnership provides students. This partnership also acts as a key component towards the London Transit Commission's funding.

What does this all mean? Because of these facts, students heavily influence planning and expansion efforts. The London Transit Commission designs bus routes and fare structures to meet student's needs. Bus routes are highly concentrated around campus, downtown, and other areas with high student density. The number of buses performing specific routes is also influenced by students. More buses operate on routes that go through campus compared to other areas of London. This is great for students as they are heavily accommodated through this process. Despite being great for students, other community members who rely on the London Transit Commission bussing system as their primary form of transit have voiced concern about this. As the bus routes are heavily concentrated in student areas such as downtown and Western's Campus, routes across other areas of London are spread thin. As the priority of the LTC is centered around students, fewer buses run non-student populated routes, causing these wait times and bus rides to be longer. Even when non-student community

¹² LTC-Ridership-growth-strategy-final-report- ... Accessed March 26, 2025. <https://www.londontransit.ca/wp-content/uploads/2021/08/LTC-Ridership-Growth-Strategy-Final-Report-Revised.pdf>.

¹³ Ibid.

¹⁴ Ibid.

members are on student dense bus routes, these buses can often be crowded and occasionally full, causing individuals to have to wait for the next bus.

Labour and Jobs

With a population of just under half a million and a location just two hours away from Ontario's largest city Toronto, and one hour away from the United States border, London Ontario holds a large array of job opportunities. Despite this, unfortunately London holds one of the lowest labour market participation rates in Canada.¹⁵ There is a particular concern regarding the low participation of individuals aged 25-54, the range that is typically supposed to represent the largest viable workforce.¹⁶ This issue is derived from the notion that London has a significant issue with its talent pipeline as many of its graduating students from Fanshawe College and Western University leave instead of filling these much-needed positions. This can be attributed to both a lack of experience and students choosing to leave London after they graduate for a variety of different reasons. Graduated students are vital to the growth of these job forces, and without them, London's Economic Region cannot prosper.

Another aspect to consider when acknowledging the impacts that students have on the London job market is an often overlooked indirect impact; the employment of these schools. These institutions, including Western and Fanshawe, employ many community members. Western and its affiliates alone employ 18,685 individuals while Fanshawe employs 3,514 individuals.¹⁷ These institutions act as an integral employer in the London community and without them we would see a meaningful negative impact.

Conclusion

Through analysis of various sectors, the vitality of students to London's economy is evident. Their presence within the community extends far beyond the classroom – they shape demands for housing, local businesses, public transportation systems, and are critical contributors to the city's evolving labour market. As such, their dynamic needs must be addressed when planning the future of London's policy, business, transit, and workforce development. To create a resilient, inclusive, and prosperous future for all.

¹⁵Labour market participation in the London Economic Region. Accessed March 24, 2025. [https://london.ca/sites/default/files/2021-08/Labour Market Participation in the London Economic Region PwC Report \(AODA\).pdf](https://london.ca/sites/default/files/2021-08/Labour%20Market%20Participation%20in%20the%20London%20Economic%20Region%20PwC%20Report%20(AODA).pdf).

¹⁶Ibid.

¹⁷ "Working at Fanshawe." Fanshawe College, November 22, 2024. <https://www.fanshawec.ca/about-fanshawe/corporate-info/working-fanshawe>; "Working at Western." Human Resources - Western University. Accessed March 24, 2025. <https://www.uwo.ca/hr/working/index.html#:~:text=Our%20People&text=During%20the%20busiest%20times%20in,24%20full%20time%20staff%20members>.

London needs to recognize students not just as learners but as residents, workers, consumers, and changemakers.

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Chapter 2: A Changing Landscape for International Students

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Introduction

January 2024 saw the Government of Canada impose a two-year intake cap on post-secondary international study permit applications, a 35% decrease from the previous year.¹⁸ In the face of decades of systemic underfunding by provincial governments, Canadian higher education institutions have increasingly relied on high international tuition fees to sustain scholarships and essential operations.¹⁹ This reliance is representative of the country's overall utilization of higher education as a pipeline for labour migration.²⁰ This common sense regarding international students has been incorporated into the country's economic policy regime over the decades. For instance, the 2014 International Education Strategy presented by the Government of Canada made an economic case for welcoming more international students to improve the economy's global competitiveness.²¹ This begs the following questions: 1. What has caused the government to drastically alter course on international student study permits, and 2. How might this impact the country's higher learning institutions? As such, this chapter highlights the context behind the imposition of study permit caps, the specifics of the policy, the government's framing of the issue, and its impact on post-secondary institutions nationwide.

The Policy Shift: Canada's 2024 Study Permit Allocation

On January 22, 2024, Immigration, Refugees, and Citizenship Canada (IRCC) introduced a cap on study permit applications to manage the strain on housing, healthcare, and other social services.²² This resulted in a 40% drop in international student numbers, marginally easing rental market pressures in certain cities. In the first five months of the cap, Canada issued 216,620 international study permits compared to 200,205 in the same period last year. By the end of 2023, 682,420 study permits were issued, the majority being Indian students 278,335, almost five times more than that of

¹⁸ Lisa Brunner and María E. Cervantes-Macías, "Reflections on Canada's First International Student Cap," *Critical Internationalization Studies Review* 4, no. 1 (2025): 2.

¹⁹ OCUFA, *University Underfunding Crisis Exacerbated by Further International Student Caps*, September 19, 2024, <https://ocufa.on.ca/press-releases/university-underfunding-crisis-exacerbated-by-further-international-student-caps/>.

²⁰ Brunner and Cervantes-Macías, "Reflections on Canada's First International Student Cap," 2.

²¹ Laiba Tahir, *Canada's Policies for International Students: Are They Working?* (University of Calgary, August 21, 2024), approved by Kevin McQuillan.

²² Government of Canada. Canada to Stabilize Growth and Decrease Number of New International Student Permits Issued to Approximately 360,000 for 2024. January 22, 2024. <https://www.canada.ca/en/immigration-refugees-citizenship/news/2024/01/canada-to-stabilize-growth-and-decrease-number-of-new-international-student-permits-issued-to-approximately-360000-for-2024.html>.

China 58,230.²³ As a result, international student interest has declined more sharply than anticipated, leading to a projected total of only 280,000 study permit approvals for 2024, representing a 45% drop from 2023. This decline marks the lowest number of approvals in a non-pandemic year since 2019, indicating a troubling trend for Canada's international education sector.²⁴

Post-Graduation Work Permit (PGWP) Eligibility: New Criteria and Implications

Alongside the new student caps, the IRCC also tightened eligibility criteria for Post-Graduation Work Permits (PGWPs). International students must now graduate from specified programs to qualify. Those enrolled in curriculum licensing agreements, where private institutions deliver programs on behalf of public ones, are no longer eligible—a move intended to prevent exploitation and improve education standards.²⁵ The revised policy also introduces field-specific requirements for college graduates. PGWPs are now limited to agriculture, healthcare, STEM, skilled trades, and transportation graduates, addressing labour shortages in these sectors. University graduates, however, remain unaffected by these restrictions. Tourism, hospitality, and business programs are excluded, raising concerns about their future, as these industries often rely on international talent. Critics argue that the policy neglects regional labour market needs.²⁶ Pari Johnston, CEO of Colleges and Institutes Canada, highlighted the disconnect between national labour priorities and local demands.²⁷ Stakeholders fear that excluding specific fields will harm communities dependent on international students, emphasizing the need for a more balanced approach.

Policy Framing & Pointing the Finger?

With the policy established, examining how the government, particularly IRCC Minister Marc Miller, has framed the issue and the rationale underpinning the measure is crucial. The new regulations were introduced in a press release on January 22, 2024, entitled

²³ Passifume, Bryan. "Foreign Student Permits Are Already Outpacing 2023'S Record Numbers." *nationalpost*. National Post, July 22, 2024. <https://nationalpost.com/news/politics/foreign-student-permits-are-already-outpacing-2023s-record-numbers>.

²⁴ Meti Basiri. "What Were the Impacts of Canada's 2024 International Student Cap?" *ApplyBoard*, January 22, 2025. <https://www.applyboard.com/applyinsights-article/what-were-the-impacts-of-canadas-2024-international-student-cap>.

²⁵ ICEF. (2024, October 5). Canadian immigration ministry releases list of college programmes eligible for post-study work permits. *ICEF Monitor - Market Intelligence for International Student Recruitment*. <https://monitor.icef.com/2024/10/canadian-immigration-ministry-releases-list-of-college-programmes-eligible-for-post-study-work-permits/>

²⁶ ICEF. "Canadian Immigration Ministry Releases List of College Programmes Eligible for Post-Study Work Permits." *ICEF Monitor*, October 5, 2024.

²⁷ ICEF. "Canadian Immigration Ministry Releases List of College Programmes Eligible for Post-Study Work Permits." *ICEF Monitor*, October 5, 2024.

Canada to Stabilize Growth and Decrease the Number of New International Student Permits. In the statement, Minister Marc Miller said in part, “International students are vital to Canada and enrich our communities. As such, we have an obligation to ensure that they have access to the resources they need for an enriching academic experience”.²⁸ This acknowledges the importance of international students to the productive and multicultural nature of Canadian society and industry. However, it sets the stage for the argument of resource precarity and systemic abuse. He says, “Today, we are announcing additional measures to protect a system that has become so lucrative that it has opened a path for its abuse. Enough is enough. [...] We are striking the right balance for Canada and ensuring the integrity of our immigration system while setting students up for the success they hope for.”²⁹ This rhetorical strategy frames international students as significant and deserving of adequate resources, which is undoubtedly true. Yet, it simultaneously places indirect blame on international students for the resource strain currently experienced by Canadians in sectors such as housing and healthcare.

While Minister Miller continues to frame the policy lurch as a decisive action to combat “abuse and exploitation by some unsavoury actors,” he has also placed blame more specifically on private colleges and universities, referring to them as “unscrupulous” for relying heavily on international student tuition and classifying them as diploma mills which offer “garbage programs” functioning as a means to enter Canada.³⁰ While there is a level of truth regarding private institutions using harmful recruiting practices, satellite programs in major cities that are incredibly ill-planned, and some students have abused the system, most international students are not guilty of anything but seeking a quality education and wanting to contribute to Canada. Further, the Trudeau administration introduced the caps when the Liberal party saw a slide in popularity polling and a stark shift in public opinion regarding immigration.³¹ With the recent switch in Prime Minister, it has yet to be seen what Mark Carney’s government will do on immigration and how

²⁸ Government of Canada, *Canada to Stabilize Growth and Decrease Number of New International Student Permits Issued to Approximately 360,000 for 2024*, January 22, 2024, <https://www.canada.ca/en/immigration-refugees-citizenship/news/2024/01/canada-to-stabilize-growth-and-decrease-number-of-new-international-student-permits-issued-to-approximately-360000-for-2024.html>.

²⁹ Government of Canada, *Canada to Stabilize Growth*, January 22, 2024.

³⁰ Brunner and Cervantes-Macías, “Reflections on Canada’s First International Student Cap,” 2.

³¹ A. Wherry, “Trudeau’s Liberals Are Trying to Save the Canadian Consensus on Immigration — and Their Legacy,” CBC News, October 26, 2024, <https://www.cbc.ca/news/politics/immigration-liberals-miller-trudeau-1.7364302>; Environics Institute for Survey Research, *Canadian Public Opinion About Immigration and Refugees*, October 2024, https://www.torontomu.ca/content/dam/diversity/reports/Canadian_public_opinion_about_immigration_refugees-EN-102024.pdf.

the issue could be instrumentalized during the upcoming spring election cycle.³² Moreover, while framed as a tool to halt system abuse and help the strain on resources, the caps have had unintended impacts on public universities and colleges, leading to drastic cuts to departments and staff.

Provincial Ramifications: A Focus on Ontario and Quebec

Quebec has taken a distinct approach in response to the federal study permit cap, implementing its measures to regulate the number of international students. By introducing targeted policies, the province aims to manage the pressures on its educational institutions while maintaining the quality and accessibility of its post-secondary system. The recent decision by the government of Quebec to issue a maximum of 124,760 acceptance certificates to international students for the 2025/2026 academic year represents a significant decrease of approximately 20% from the previous year.³³ This cap is primarily aimed at managing the surge of international students, especially in vocational training programs, which have dramatically increased in recent years. Implementing Bill 74 allows the province to set specific caps for each school, program, field, and level of study, thereby providing a structured approach to regulating international student admissions.³⁴ This move reflects the government's intention to balance the influx of international students while ensuring that the educational system remains sustainable and effective.

In response to the federal government's cap on international student permits for 2025, Ontario has strategically adjusted its allocation process, receiving 181,590 applications, which is expected to yield 116,740 study permits for students at its institutions.³⁵ Notably, 32,579 applications are reserved explicitly for master and doctoral degree programs, reflecting a targeted approach to meet the province's labour market needs³⁶. Publicly assisted colleges and universities will receive 96% of the allocations. The remaining 4% will be distributed among language schools and private universities, with career colleges excluded from receiving any applications. This allocation strategy is part of Ontario's effort to align educational programs with high-priority labour market areas, including skilled trades, health human resources, and STEM fields, ensuring graduates

³² Leyland Cecco, "Canada to Head to Polls as Mark Carney Calls Snap Election for 28 April," The Guardian, March 23, 2025, <https://www.theguardian.com/world/2025/mar/23/canada-to-head-to-polls-as-mark-carney-calls-snap-election-for-28-april>.

³³ Martin, Kim. "Québec Releases International Student Caps for 2025/2026." The PIE News, February 27, 2025. <https://thepienews.com/quebec-releases-international-student-caps-for-2025-2026>.

³⁴ Martin, Kim. "Québec Releases International Student Caps for 2025/2026." The PIE News, February 27, 2025.

³⁵ Ontario. "ContentKeeper Content Filtering." Ontario.ca, 2025. <https://news.ontario.ca/en/release/1005623/ontario-continues-allocating-international-student-applications-to-support-labour-market-needs>.

³⁶ Ontario. "ContentKeeper Content Filtering." Ontario.ca, 2025.

are well-prepared for in-demand jobs.

Canadian Universities and Colleges: Challenges and Considerations

The cuts to international student permits have caused universities and students to worry about the future of Canada's education system. When Immigration Minister Marc Miller announced the reduction of international student permits by 10%, lowering the number to 437,000 – now including graduate and doctoral students previously exempt – universities said they experienced this policy shift "like an earthquake."³⁷ The budget has been reduced nationwide, notably in Quebec, Ontario, and the Maritimes. Gabriel Miller, president of Universities Canada, said the number of expected students coming in will be lower than previously predicted, and that will mean that talented individuals like doctors and engineers will not come to Canada.

This issue is exacerbated since Ontario universities rely heavily on international students to cover funding shortfalls. The average international undergraduate tuition is \$48,267 in 2024-25, compared to \$8,514 for domestic students. Ontario funds domestic students at \$9,890 per student, 40% below the national average of \$15,806.³⁸ Consequently, tuition makes up 41% of university revenues, compared to the national average of 31.2%. Nigmendra Narain, OCUFA President, criticized this reliance, likening international students to "ATMs" used to compensate for inadequate provincial funding.³⁹

Many universities have announced mass cuts to programs as a result. For instance, York University has announced that it will suspend new admission to 18 programs due to the dramatic drop in enrollment prompted by the unexpected federal policy direction.⁴⁰ Sheridan College has also suspended 40 programs and cut staff due to the drop in enrollment.⁴¹ This highlights the policy's unintended impact on public institutions, the reality of cutting international students, and the essential income stream for colleges and universities in the face of provincial underfunding.

³⁷ Wong, Jessica. "New Limits on International Students Are Causing Turmoil among Colleges, Universities." CBC, September 20, 2024. <https://www.cbc.ca/news/canada/intl-student-cap-restrictions-reax-1.7328052>.

³⁸ OCUFA. *University Underfunding Crisis Exacerbated by Further International Student Caps*. September 19, 2024.

³⁹ OCUFA. *University Underfunding Crisis Exacerbated by Further International Student Caps*. September 19, 2024.

⁴⁰ Rochelle Raveendran, "York University Temporarily Suspending New Admissions to 18 Programs," CBC News, February 19, 2025, <https://www.cbc.ca/news/canada/toronto/york-university-temporarily-suspending-admissions-18-programs-1.7462610>.

⁴¹ CBC News, "Sheridan College to Suspend 40 Programs and Reduce Staff, Citing Drop in Enrolment," November 26, 2024, <https://www.cbc.ca/news/canada/toronto/sheridan-college-programs-suspended-enrolment-drop-1.7393853>.

Lessons from the Cap: Reflecting on the Impact of Canada's International Student Policy Shift

The cap on international students in Ontario has led to significant challenges for the province's colleges, resulting in a nearly 50% decrease in international enrollment and prompting deep cuts across sectors. With international students previously constituting a substantial portion of college revenue, 32% compared to just 11% from domestic students, this shift has created fiscal pressures that many institutions are struggling to manage.⁴² As institutions like York and Sheridan face layoffs and program suspensions, the Ontario government has emphasized the importance of rebalancing the post-secondary sector to ensure long-term sustainability and success.

In 2025, Canadian universities face financial ruin due to the sharp decline of revenue resulting from cuts to international student admissions, their primary income source.⁴³ As explained, the cap has led to sweeping layoffs, hiring freezes, and university program cuts. According to the Council of Ontario Universities, they have lost over \$330 million for this fiscal year alone, which is set to reach \$600 million in the coming year. This chapter has demonstrated the pertinence of this policy lurch nationwide. As such, subsequent chapters will explore the nuanced impacts of this policy change on London, Ontario, offering more profound sector-specific insights.

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⁴² Callan, Isaac, and Colin D'Mello. "'No College Will Be Spared': International Student Cap Bites in Ontario." *Global News*, December 12, 2024. <https://globalnews.ca/news/10912982/ontario-college-layoffs-international-student-reliance/>.

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Chapter 3: An Expressivist Critique of International Student Visa Cap Policy

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Introduction

This chapter will examine the impact of the international student cap through the lens of an expressivist critique, looking at what the policy implicitly expresses about the perceived issue at hand. An expressivist critique involves examining the ways in which policy language and the foreseeable impacts of policy actions can express the underlying attitudes surrounding a particular issue. This can be done through examining explicit and implied moral language, meaning words and phrasing that carry moral connotations.⁴⁴ Classic examples of this kind of normative language include terms such as ‘good’, ‘bad’, ‘ought’, etc.⁴⁵ In addition to language, an expressivist critique approach looks at the outcomes of policies and the implications of any action or inaction taken (statements, adjustments to approach, etc.). This kind of critique emphasizes the manifestation of moral attitudes in policy making as having implied effects on societal beliefs more generally. In other words, the attitudes we have when it comes to certain issues will preside over the ways in which we address them which is why the expressivist critique is worthy of further analysis, especially in relation to the topic of this project.

Expressivist Critique Applied: International Student Cap

By placing a cap on the number of international students accepted into the country, the Canadian government is, according to the expressivist critique, expressing an attitude toward international students that is rather harmful and reinforces negative societal attitudes toward international students. The government's central motivation for introducing the cap seems to be rooted in economic concerns such as “... pressure on housing, health care and other services”.⁴⁶ While these are valid areas of concern for any government, they are also common talking points in a current political discourse that unfairly targets international students for economic hardships, contributing to the spread of xenophobia and misinformation.⁴⁷ By capping international students on these grounds, the government sends a message to the public that international students are in some way burdensome to our society and economy in Canada. Understanding this context, it is irresponsible for the Canadian government to be fostering this narrative through the international student cap policy; conversations surrounding it do not work to

⁴⁴ Mark van Roojen, “Expressivism - Routledge Encyclopedia of Philosophy,” www.rep.routledge.com (2015).

⁴⁵ Stephen Finlay, “Moral Language, Uses Of,” *The International Encyclopedia of Ethics* (January 2013).

⁴⁶ Government of Canada. “Canada to Stabilize Growth and Decrease Number of New International Student Permits Issued to Approximately 360,000 for 2024,” www.canada.ca (January 2024).

⁴⁷ Shamiga Arumuhathas, “Navigating Perspectives: Unpacking the Discourse Surrounding International Student Experiences in Canadian Higher Education,” *Canadian Journal for New Scholars in Education/ Revue Canadienne Des Jeunes Chercheuses et Chercheurs En Éducation* 14, no. 3 (2023): 46–54.

address the reality of what the policy may express, which furthers the degree of harm it may cause.

Addressing ImpactLab London's Question

What is the impact of the international student cap on the talent pipeline in London? There are expressivist criticisms that apply to the question posed by the City of London itself; the two main concerns being a complicity in an anti-immigrant narrative and the utilization of international students as objects or resources rather than subjects in and of themselves. Organizations that work with the international student cap and fail to identify these concerns are meaningfully complicit in spreading or at least accepting those assumptions which the policy may carry: the idea that international students are to be regulated so as to not be burdensome, failing to recognize them as productive members of our communities and future economy.

The question provided to us by ImpactLab relates directly to the value of international students to our economy in London, suggesting an opposition to ideas discussed above regarding the question of their worth. However, the major concern with what is expressed by this question is that it may diminish international students – who comprise a diverse group of individuals with goals, desires and needs – into a mere resource for use by the City of London to fuel its economy. By asking how this hugely influential piece of policy affects not the people that it targets – some of whom reside in London and are a large part of the community – but how it affects the economic prosperity of London through the concept of a ‘talent pipeline’ may implicitly express a problematic view of international students, leaving out important parts of the conversation. It could signal to international students that the priorities of the City in relation to the cap are solely economic, failing to recognize the further reaching impacts of this policy beyond the local London community.

Why Care?

Applying the expressivist critique to the question at the heart of this project uncovers many useful insights which have both intrinsic and instrumental value to those involved in the conversation surrounding Canada's international student cap. Understanding what policies may express regardless of intent is a valuable tool when it comes to effective policy making. Canada's reputation as a prime destination for international students to further their education has been jeopardized because the cap has been interpreted as anti-immigrant, signaling a general shift toward a less international student-friendly culture within the country whether there is intent to do so or not. This shift in perception globally has tangible social and economic implications for Canada's

economy, which is worthy of further critical analysis.⁴⁸ The question to keep in mind throughout this report is: what does the prompt and our discourse surrounding the international student cap implicitly express about how we regard and/or value international students in Canadian society?

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⁴⁸ Jessica Wong, "New Limits on International Students Are Causing Turmoil among Colleges, Universities," *CBC* (September 2024).



Chapter 4: Trends in International Enrollment

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Introduction

The recent cap on international student permits will significantly impact enrollment at post-secondary institutions across Canada, particularly in Ontario. This chapter analyzes how the international student cap has affected enrollment at Western University, its affiliate colleges—King’s and Huron —and Fanshawe College, highlighting city-wide trends and program-specific impacts. Data suggests that while universities generally have more diversified funding sources, Ontario colleges rely heavily on international student tuition, which renders them more vulnerable to enrollment fluctuations. Although initial trends are emerging, the full and long term effects of the international student cap are not yet fully understood. By examining enrollment data and existing financial structures, this chapter explores the anticipated impacts of the international student cap on universities and colleges situated within London, Ontario.

Figure 1.23: International Students as a Percentage of Total Student Body, by Region and Sector, 2022-23

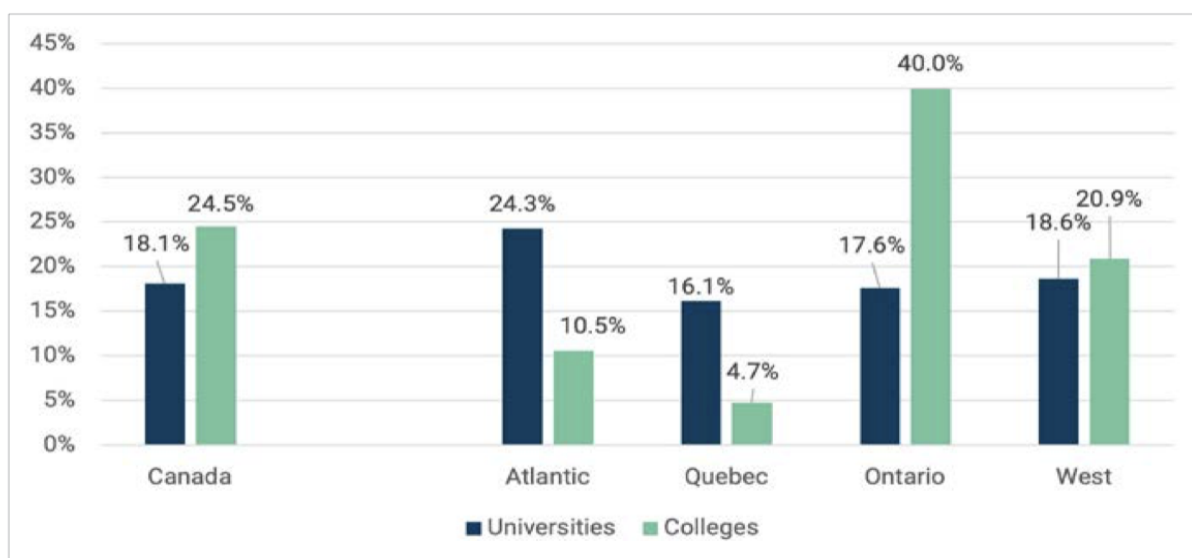


Figure 1

Overarching Enrollment Trends

International student enrollment plays a critical role in contributing to the financial and structural stability of post-secondary institutions in Ontario. A closer examination of the data reveals a significant disparity between colleges and universities in their reliance on

international students. Statistics show that international students comprise 40% of college enrollments compared to only 17.6% of university enrollments, as displayed in **Figure 1**.⁴⁹ This distinction has profound implications particularly in light of recent policy changes regarding the international student cap, which disproportionately affects Ontario colleges.

Figure 1.24: International Students, by Major Field of Study, Canadian Universities 1992-93 to 2021-22

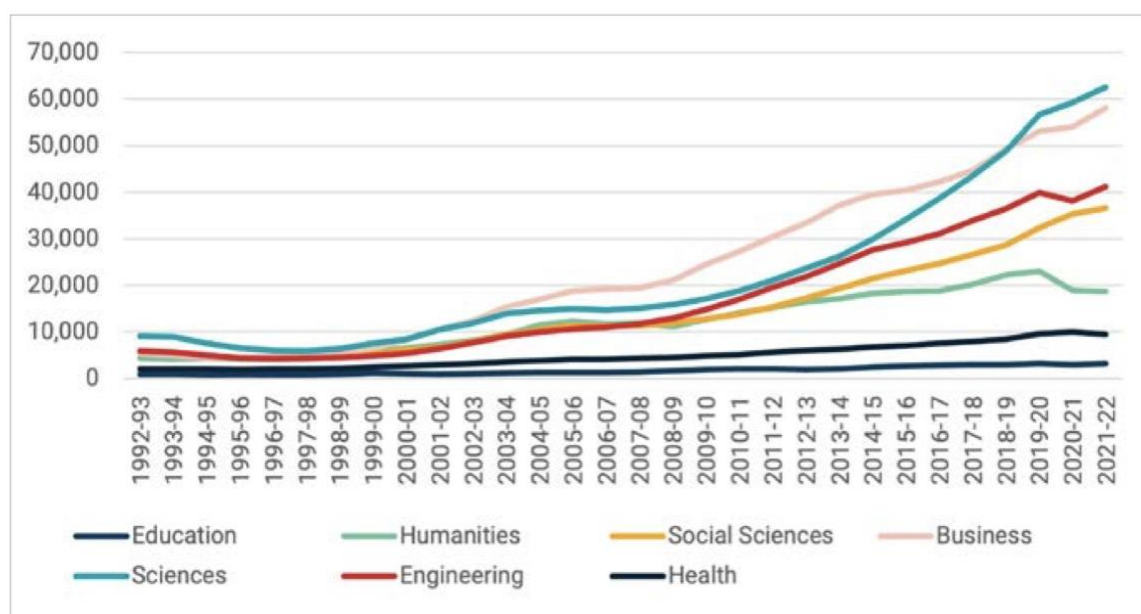
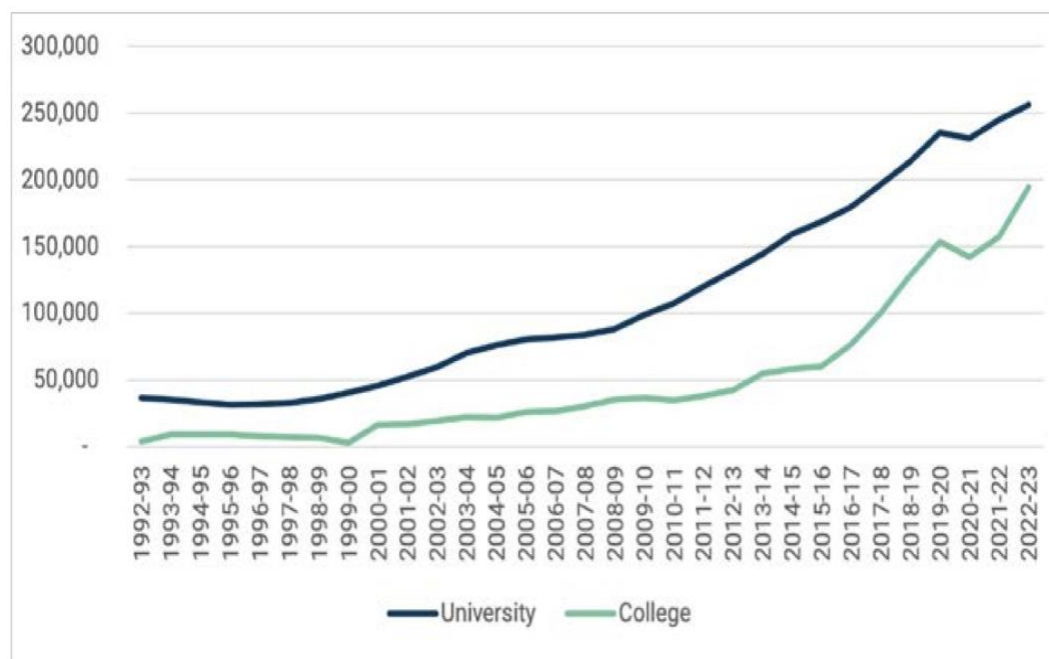


Figure 2

At the program level, international students in Canadian universities are primarily concentrated in Science, Business, and Engineering programs, as displayed in **Figure 2**.⁵⁰ This aligns with the enrollment trends observed at Western University, where Science, Social Science, and Engineering experienced small decreases in international student numbers, which will be discussed later on. However, because Western's international student population is proportionally smaller compared to many colleges, and because these programs still retained a strong enrollment base, the overall impact on Western University has been minimal thus far.

⁴⁹ Alex Usher and Janet Balfour, *The State of Postsecondary Education in Canada* (2024) p. 17.

⁵⁰ Ibid.

Figure 1.22: International Enrolments by Sector, Canada, 1992-93 to 2022-23**Figure 3**

On a national scale, **Figure 3** shows how international student enrollment in Canada has been steadily increasing over the past few decades.⁵¹ While universities have consistently enrolled a larger proportion of international students than most colleges across Canada, Ontario presents an exception to this pattern.⁵² The province of Ontario exhibits higher international enrollment in colleges compared to universities — a trend that underscores the unique challenges faced by Ontario’s post-secondary institutions.⁵³

Finance and Policy Context

Post-secondary education in Canada is facing a financial crossroads, with institutions increasing their reliance on international student tuition to compensate for stagnant public funding. To understand this relationship, it’s important to note that the fiscal health of universities and colleges is shaped by a combination of government grants,

⁵¹ Ibid, p. 17.

⁵² Ibid, p. 106.

⁵³ Ibid.

domestic tuition, and international student fees, with the latter playing a dominant role in institutional budgets.

According to Alex Usher, 100% of the new operating spending in Canadian higher education since 2008 has come from international tuition fees.⁵⁴ Public funding for post-secondary institutions has remained relatively stagnant since the Great Recession, forcing universities and colleges to become increasingly dependent on international student tuition to sustain operations.⁵⁵ However, the cap that was recently introduced for incoming international student permits threatens this crucial revenue stream, particularly for Ontario colleges. While universities benefit from more diversified income sources—such as research grants and philanthropic donations—colleges, especially non-polytechnic institutions outside major cities, rely disproportionately on international student fees to balance their budgets.⁵⁶

The financial structure of Ontario's post-secondary institutions highlights key differences between universities and colleges; universities generally receive higher levels of per-student government funding due to their research-intensive mandates, while colleges operate on tighter budgets with a greater dependence on tuition fees. Ontario college enrollments have declined by 27% since 2012, and domestic enrollments across Canada have decreased by 13.6%, making international student fees even more essential to their continuity.⁵⁷

Ontario universities have not been immune to funding challenges either; provincial government support for universities has decreased by 15% since its peak in 2007.⁵⁸ While domestic enrollments in Ontario universities have grown by 5%, revenue per student has declined as tuition fees have fallen in real terms since 2019.⁵⁹ Consequently, universities continue to advocate for increased government investment to offset financial pressures and ensure long-term stability in the sector. Figures 4-7 represent institutional and program enrollment breakdowns based on data sourced from Western University records.

⁵⁴ Ibid, p. 34.

⁵⁵ Ibid.

⁵⁶ Ibid, p. 1.

⁵⁷ Ibid

⁵⁸ Ibid, p. 2.

⁵⁹ Ibid, p. 1.

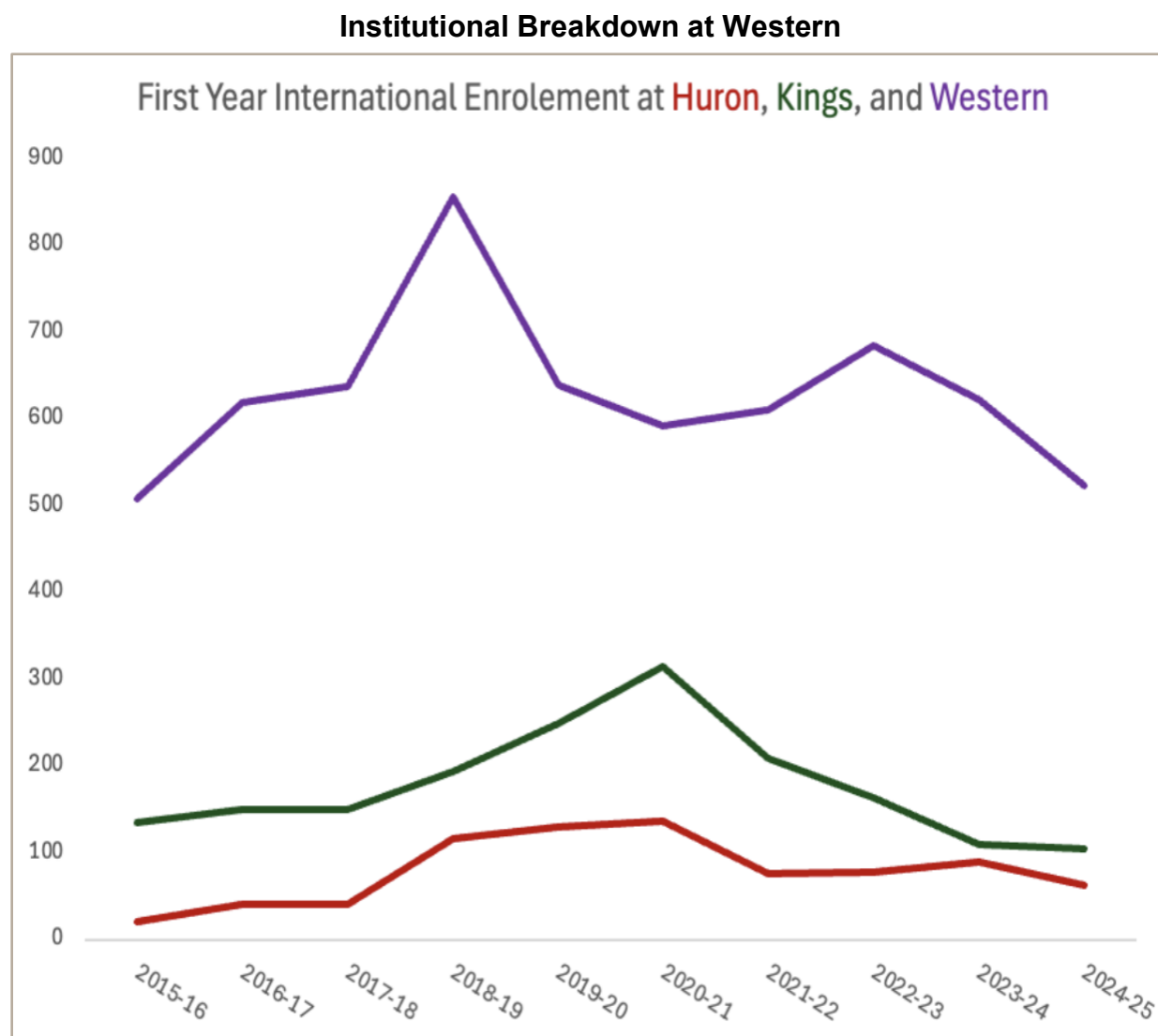


Figure 4

Western University, along with its affiliates Huron and King's College, experienced minimal disruption in enrollment statistics, as evidenced by **Figure 4**. The enrollment numbers at these institutions have remained relatively stable, with no significant decrease in student numbers.⁶⁰ This stability can be attributed to Western's broader financial structure, which includes a diverse mix of funding sources such as government grants, research funding, and a strong domestic student base. Western has the financial flexibility to absorb shifts in international student enrollment, allowing it to maintain a steady overall enrollment despite the policy changes.

⁶⁰ "Full-Time Enrolment at Western," Student Enrolment, Accessed March 17, 2025

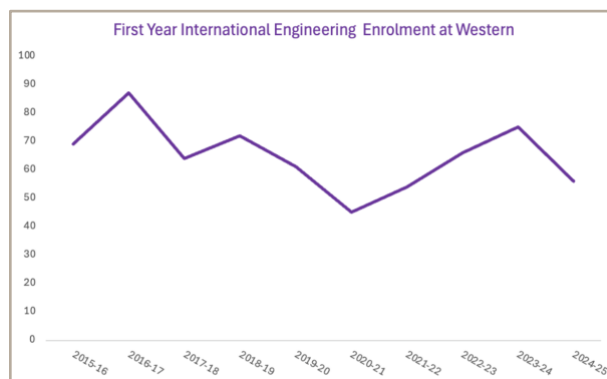


Figure 5

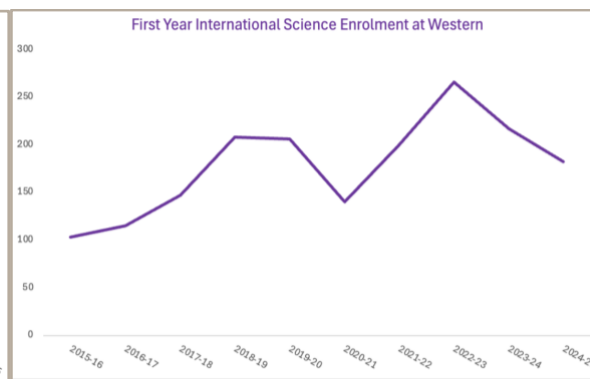


Figure 6

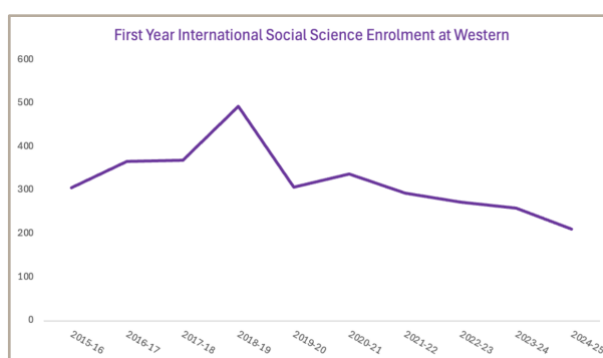


Figure 7

While Western's overall enrollment remained stable, there were some small shifts in specific programs. For instance, as exemplified in **Figure 5**, the Engineering program saw a decrease in first-year international student enrollment, dropping from 75 to 56 students.⁶¹ Similarly, the Science program experienced a reduction, with international student numbers falling from 217 to 182, as shown in **Figure 6**.⁶² The Social Science program also saw a decrease, shown in **Figure 7**, with international student enrollment dropping from 259 to 211.⁶³ While current data shows that these changes are relatively less impactful for Western, other post-secondary institutions such as Fanshawe College are observing greater fluctuations.

Institutional Breakdown at Fanshawe

Unlike Western University, Fanshawe College has experienced more pronounced enrollment challenges due to its greater reliance on international tuition. Over the past

⁶¹ Ibid.

⁶² Ibid.

⁶³ Ibid.

few years, the college has seen rapid growth in its international student population, as shown in **Figure 8**. In 2018, just over 4,000 study permits were issued to Fanshawe students.⁶⁴ By 2023, that number has nearly tripled to approximately 11,700, making Fanshawe one of the top three Canadian post-secondary institutions for international student permits.⁶⁵ In the 2023-2024 school year, international students made up about 55% of the total student body, while domestic students accounted for 45%.⁶⁶

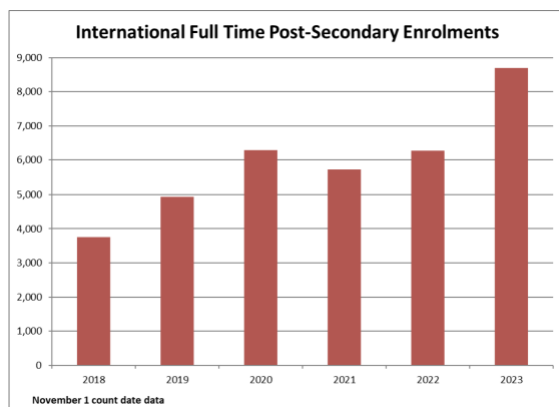


Figure 8

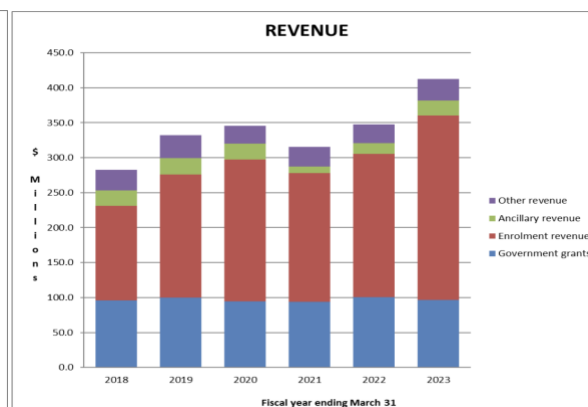


Figure 9

The influx of international students has played a crucial role in Fanshawe's financial growth. According to their 2022-2023 annual report, total revenue has increased by \$64.7 million during that academic year, a rise that was "primarily driven by international student enrollments."⁶⁷ **Figure 9** illustrates the increase in revenue, highlighting the direct correlation between rising international enrollment and financial growth at Fanshawe.

However, in 2024, this trend began to noticeably reverse. By November 2024, the number of international study permits at Fanshawe College had dropped to 7,630 — a sharp decline from 10,290 issued during the same period in 2023.⁶⁸ While full figures for December 2024 and January 2025 are unavailable, this downward trajectory signals a significant shift in international enrollment and funding. This trend was supported by Peter Devlin, the president of Fanshawe, who stated: "What I can share with reasonable confidence today is that we are projecting a 47 percent reduction in international Level 1

⁶⁴ "Fanshawe College Prepares for 2025 School Year with Thousands Fewer International Students | CBC News," CBC News (October 2024)

⁶⁵ Ibid.

⁶⁶ Matthew Trevithick, "International Student Cap Won't Have an Impact in 2024, but beyond Is Uncertain: Fanshawe President | CBC News," CBCnews, April 9, 2024, <https://www.cbc.ca/news/canada/london/international-student-cap-won-t-have-an-impact-in-2024-but-beyond-is-uncertain-fanshawe-president-1.7168079>.

⁶⁷ Fanshawe annual report 2022/23, 2024, [https://www.fanshawec.ca/sites/default/files/2023-08/Fanshawe Annual Report 2022_2023\[45\].pdf](https://www.fanshawec.ca/sites/default/files/2023-08/Fanshawe%20Annual%20Report%2022_2023[45].pdf), p. 12.

⁶⁸ Matthew Trevithick, "How Is the International Student Cap Impacting Fanshawe College? Staff May Soon Find out | CBC News," CBC News (January 2025).

student enrollment for the January intake and a 39 percent reduction for the May intake."⁶⁹

Though the full extent of the impacts are yet to be seen, provincial policy changes suggest that certain Fanshawe programs will be more affected than others. The “priority programs” mandate requires a minimum headcount in fields such as Early Education and Health as well as Human Services to help workforce shortages.⁷⁰ Fanshawe College has also announced that they will be cutting fifteen level one programs at the School of Hospitality, Tourism and Culinary Arts for the 2025 spring, 2025 fall and 2026 winter semesters.⁷¹ Additionally, the province has implemented a two-year pause on certain one-year Business Management programs, preventing incoming international student enrollment due to concerns over program sustainability and post-graduation job opportunities.⁷²

Further compounding these challenges, many international students at Fanshawe will no longer be eligible for post-graduation work permits, significantly reducing the appeal of these programs for students who come to study on international student visas.⁷³ As a result, enrollment declines are expected to continue in the future. Fanshawe has not yet publicly disclosed which programs will be cut, but it has been confirmed that 18 programs will be eliminated in Winter 2025.⁷⁴ Given the federal and provincial mandates as well as workforce priorities, it is likely that those affected will come from sectors such as business and other “non-priority” fields.

Concluding Takeaways

With the federal government introducing a cap on international student permits, Ontario’s colleges are expected to face disproportionate financial effects. Unlike universities, which have multiple funding streams and research opportunities, many colleges lack the ability to offset these losses. The sharp decline in domestic enrollments combined with a reduced international student revenue stream could lead to program cuts, faculty reductions, and institutional instability. The impact is going to be

⁶⁹ “Fanshawe College Prepares for 2025 School Year with Thousands Fewer International Students | CBC News,” CBC News (October 2024).

⁷⁰ Ibid.

⁷¹ Matthew Trevithick, “How Is the International Student Cap Impacting Fanshawe College? Staff May Soon Find out | CBC News.”

⁷² “Fanshawe College Prepares for 2025 School Year with Thousands Fewer International Students | CBC News.”

⁷³ “Updates for International Students - Fanshawe Toronto@ilac Campus,” Fanshawe Toronto@ILAC (February 2024).

⁷⁴ Heather Rivers, Fanshawe College Chops 18 programs as student numbers drop | London Free Press (January 2025).

particularly severe for smaller colleges and non-polytechnic institutions, which rely on international tuition as a primary source of funding.

The financial landscape of post-secondary education in Canada is undergoing a fundamental shift and the financial viability of many Ontario Colleges is under increasing threat as student numbers decline; without the same level of government funding as universities, they are particularly vulnerable to sudden shifts in enrollment patterns. This disparity explains why the international student cap has had a more immediate and severe effect on these smaller institutions. It is important to note that the full effects of the policy change are yet to be seen — addressing these challenges will require a renewed commitment from provincial and federal governments to ensure that institutions can meet the needs of both domestic and international students, avoiding long-term instability.

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Chapter 5: London's Housing Strain History (and why the student cap won't fix it)

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London Ontario, has experienced fluctuations in its housing and rental market. Over the past few decades, the city has grappled with issues of affordability and availability, particularly within the rental sector. The international student visa cap has been suggested as a potential measure to alleviate the strain on housing markets, especially in university and college towns like London (Immigration, Refugees and Citizenship Canada or Committee, 2024a). The common assumption following this announcement was that a reduction in international students would directly translate to decreased demand for rental units, thereby providing much-needed relief in the strained rental sector (Trevithick, 2024).

Looking at the history of London's complex housing affordability and current income/rent gap reveals the international student cap's changes in the market.

Housing instability was a recognized issue at least as far back as the late 2000s; the implementation of the London CARES⁷⁵ program in 2008 was a direct response to the growing homeless population in the city. The challenges faced by the London CARES program in securing suitable and affordable housing units for homeless individuals, even with financial assistance programs like Ontario Works (OW) and the Ontario Disability Support Program OW (ODSP), revealed a persistent shortage of adequate low-income housing (Kennedy et al., 2016).

The increased proportion of seniors on the waitlist for social housing in Ontario, rising from 21% in 2006 to 33% in 2014, showed a growing demand for subsidized housing that the supply has not kept pace with (Ontario Non-Profit Housing Association, 2016).

Before the onset of the COVID-19 pandemic, London was facing significant challenges in its housing and rental market. The Housing Stability for All Plan (HSAP) report investigated the pre-existing housing crisis in London, characterized by a lack of affordable housing stock available to a growing population (City of London, 2022). A considerable portion of London residents were already experiencing core housing need⁷⁶ indicating a chronic affordability issue in which incomes were not keeping pace with rising housing costs (City of London, 2022).

The pre-pandemic market had persistently low vacancy rates in purpose-built rental apartments, signifying strong demand for rental units. Data from 2019 showed a purpose-built apartment vacancy rate declining to 1.8%, driven by intense demand from

⁷⁵ London CARES assists people dealing with chronic homelessness with street outreach, supportive housing, and housing stability.

London Cares. Accessed March 19th, 2025. <https://londoncares.ca/>

⁷⁶ Core housing need defined as households spending 30% or more of their income on shelter costs. Ontario Ministry of Municipal Affairs and Housing. 2024. *Housing Needs in Ontario*. <https://www.ontario.ca/document/community-housing-renewal-ontarios-action-plan-under-national-housing-strategy/housing-needs-ontario#:~:text=Core%20housing%20need%20measures%20whether%20a%20household,or%20more%20of%20income%20on%20shelter%20costs.>

London's growing population, which sustained high rental market demand (Canada Mortgage and Housing Corporation, 2020).

The COVID-19 pandemic significantly accelerated the existing problems in London's housing and rental market. Following the initial lockdown in the spring of 2020, the housing market experienced rapid and substantial increases in both housing sale prices and rental rates. Between the latter 2020 and early 2022, house prices in London surged by approximately 52%, while wages effectively remained stagnant (City of London, 2022).

The gap between average rents and household incomes widened further, pushing the prospect of affordable housing further out of reach for many Londoners. The average single wage earner in London needed to work increasingly more hours to afford a two-bedroom unit (City of London, 2022). In both 2022 and 2024, several household types, particularly those relying on social assistance like OW and the ODSP, were left with negative balances after covering just rent and food, even before accounting for other essential expenses such as utilities, transportation, and healthcare (Middlesex-London Health Unit, 2024).

A primary driver behind the implementation of the international student cap was the underlying assumption that a reduced number of international students entering Canada would lead to decreased demand for rental housing, particularly in cities like London. (Immigration, Refugees and Citizenship Canada or Committee, 2024). However, the slight increase in London's overall apartment vacancy rate in 2024, as noted by the Canada Mortgage and Housing Corporation (CMHC), offers a superficial indication of easing pressure on the rental market (CMHC, 2024a).

While the average vacancy rate for purpose-built rental apartments in major Canadian cities rose to 2.2% in 2024, this marginal increase in vacancy rates primarily benefits the higher end of the market (CMHC, 2024). This vacancy relief does very little for Londoners whose income is outpaced by the rental market.

The 2024 average rental price in London, Ontario, for a two-bedroom apartment is over \$1,540.13 (CMHC Data Tables, 2024b). Though wages can vary among full-time workers, with minimum wage, a person aged 15-24 would have needed to work about 90⁷⁷ hours a month to afford rent alone. The average weekly hours worked by full-time employed Ontarians aged 15–24 suggest that they work approximately 148⁷⁸ hours per

⁷⁷ Calculated by dividing average rental price of a two bedroom aptment, \$1,540.13, by the minimum wage of Ontario, \$17.20.

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⁷⁸ Calculated by multiplying the average usual hours, 38.6 hours, of full time workers, 15-24, in Ontario, by the average 4 work weeks in a month.

Statistics Canada. 2025a. *Table 14-10-0043-01: Household Income by Economic Family Type and*

month (Statistics Canada, 2025a). Based on these figures, a minimum wage worker would have to allocate roughly 60%⁷⁹ of their pre-tax income to housing costs. This is considered a deep core housing need, where over 50% of income goes toward housing costs (Ontario Ministry of Municipal Affairs and Housing, 2024).

Furthermore, looking at specific groups like students or young adults (15-24), only half of the sampled population works full-time (Statistics Canada, 2025b). Looking at the part-time working Ontarians (15-24) who, on average, work 14 hours a week and 56⁸⁰ hours a month (Statistics Canada, 2025a). That is drastically short of the 90 hours a month income needed to afford a two bedroom apartment's rent. Even adjusting for a single bedroom apartment's cost to rent (2024), \$1,299⁸¹, minimum wage workers would need to work at least 76⁸² hours.

The historical lack of affordable housing in London has been a persistent issue, creating significant barriers for residents seeking suitable housing. The widening gap between income and the increasing costs of housing make it increasingly difficult for many households to afford suitable housing. Even with a slight increase in vacancy rates in 2024, the affordability crisis remains largely unaddressed, particularly for low-income earners and those who receive social assistance. The lack of affordable housing options not only impacts individuals' and families' well-being but also has broader societal implications, hindering GDP growth and job creation (CANCEA, 2024).

As experts suggested, the impact of the cap on the rental market would be "somewhat slow and muted," indicating that it will not substantially lower rents or significantly improve affordability in the short term (Pomeroy, 2024). Similarly, an analysis by RBC Economics explains that while the cap will slow the growth of rental demand from international students, it won't immediately reduce the number of students already in Canada, thereby maintaining existing rental demand (Battaglia, 2024).

The affordable housing scarcity in London is so severe that even if all the international students at Western University were to find accommodation elsewhere, it would not

Income Source, Canada, Provinces and Territories, 2020–2024.

<https://www150.statcan.gc.ca/t1/tbl1/en/tv.action?pid=1410004301&pickMembers%5B0%5D=1.7&pickMembers%5B1%5D=3.1&pickMembers%5B2%5D=5.1&pickMembers%5B3%5D=6.2&cubeTimeFrame.startYear=2020&cubeTimeFrame.endYear=2024&referencePeriods=20200101%2C20240101>

⁷⁹ The total pre-tax monthly income of a full-time minimum wage worker (148 hours × \$17.20 = \$2,541.60) was used to calculate the percentage of income spent on housing. Based on this calculation, a worker earning minimum wage would spend approximately 60% of their income on housing costs (\$1,540.13 ÷ \$2,541.60 = 0.60).

⁸⁰ Calculated by multiplying the average usual hours, 14.7 hours, of part time workers, 15-24, in Ontario, by the average 4 work weeks in a month.

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⁸¹ Rental price of a single bedroom apartment in 2024.

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⁸² Calculate by dividing average rental price of a single bedroom aptment, \$1,299, by the minimum wage of Ontario, \$17.20.

significantly alleviate the problem. To put this into perspective, in 2024, there were 4,690⁸³ international students at Western. If all these students did not reside in London, the number of available accommodations would still be insufficient to meet the needs of the over 7,000 households on the subsidized housing wait list (City of London, 2024).

The international student visa cap has been framed as a solution to Canada's growing market pressures, but there is no concrete evidence linking the policy to any significant relief yet. Other economic factors, including post-pandemic market changes, may play a larger role. Without clear data demonstrating a causal link, it is far too early to claim that reducing international student numbers has had a meaningful impact on affordability or availability.

Even if the cap were to slow rental demand growth in London, the deeper issue remains the chronic shortage of affordable housing. The lack of affordable housing options and high core housing needs are longstanding barriers for London residents, predating the recent influx of international students. Ultimately, the international student cap will not be the solution to London's housing strain.

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Part II: Case Study Examinations



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Chapter 6: Corporate Headquarters & Financial Services

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Executive Summary

Top talent follows top opportunities. This chapter will provide an in-depth analysis of London's corporate opportunities and their impact on talent retention of post-secondary graduates. Once a thriving hub for corporate headquarters, London has seen a significant decline in its economic prominence. Today, the city serves as a shell of its former self, with only a handful of major companies choosing to maintain their headquarters within its limits.

London continues to produce an exceptional pool of professional talent. Institutions like Western University, Ivey Business School, and Western Law School consistently graduate highly skilled individuals who possess the knowledge and expertise necessary to thrive in competitive corporate environments. However, the city struggles to retain these professionals due to a lack of corporate opportunities and an absence of attractive career prospects. Consequently, many of London's brightest minds are compelled to seek employment in larger metropolitan areas, such as Toronto, Vancouver, or other international business hubs.

Included in this category are international students, who foster diversity and strength in the London community. These students are more likely to stay in the London area post-graduation, because in contrast to domestic students, they have no hometown to return to within Canada. Unfortunately, Canada's international student cap is exacerbating London's talent retention issue, as what would've been top prospects are being denied entry to the country.

Through extensive research, a few mitigation techniques were identified. Immersing work with schools, like some of these top institutions having a downtown campus, could help broaden students' perspectives on available corporate opportunities in London post-graduation. Additionally, partnerships like co-op programs and networking events to better communicate these opportunities to students are key for London's economy to thrive going forward.

The Context

Canada's economic policies, particularly its high corporate income taxes (averaging 26.5% combined federal-provincial) and rising capital gains taxes (50% inclusion rate, increasing to 66.67% in 2024), have far-reaching implications that trickle-down to its cities.

These policies reduce business investment and mobility, economic activity, job creation, and urban growth. Over the past 10-15 years, Canada's GDP per capita growth has stabilized at 0.7% annually, reflecting weak productivity and investment, key drivers of economic prosperity.⁸⁴

High corporate income taxes deter corporations from establishing or expanding headquarters in Canada, leaving cities with less economic output. The reality is quite simple, higher corporate taxes reduce after-tax profits, limiting reinvestment, growth, and wage increases. Meanwhile, high capital gains taxes, set to hit 67% on gains above \$250,000, reduce liquidity by taxing asset sales heavily. This discourages companies from restructuring or relocating, as exiting or selling triggers significant tax liabilities. The result is a locked-in effect, where firms remain in Canada, not out of choice but necessity, with little incentive to innovate or grow.

Canada ranks 26th out of 38 OECD countries for business tax competitiveness, making it less attractive for foreign investment.⁸⁵ This leaves Canadian cities struggling to attract headquarters and high-paying jobs, as companies seek more tax-efficient opportunities elsewhere. Compare this to Ireland, which slashed corporate taxes from 40% to 12.5% in the 1990s, sparking a boom that saw GDP per capita grow at over 5% annually and soar past Canada by the mid-2000s. As a result, Irish cities like Dublin became hubs for tech and pharma giants like Google and Pfizer, creating jobs and boosting local economies.⁸⁶ Canadian cities, in contrast, see fewer headquarters, leading to fewer jobs, less demand for office space, and weaker city tax revenues. Manufacturing hubs like Windsor or Kitchener have seen industrial closures, while even major centers like Toronto struggle to attract new corporate giants beyond legacy banks.

Effects On London, Ontario

London, Ontario, Canada's 11th-largest city, exemplifies this trickle-down effect. Once a manufacturing powerhouse, its economy has declined, leaving only Canada Life and 3M as notable headquarters. This insufficient corporate presence reflects broader trends, such as high taxes and regulatory burdens make London unattractive for new corporate bases. Canada Life, a legacy firm, stays due to historical roots, while 3M's presence ties to specific industrial needs, not tax advantages. Subsequently, London's economic

⁸⁴ Jake Fuss, "Canada's tax competitiveness waning due to federal government's tax changes," Fraser Institute, 2024, <https://www.fraserinstitute.org/commentary/finance-minister-misleading-canadians-about-economic-growth>.

⁸⁵ Jake Fuss, "Finance Minister Misleading Canadians about Economic Growth," Fraser Institute, 2024, <https://www.fraserinstitute.org/commentary/finance-minister-misleading-canadians-about-economic-growth>.

⁸⁶ Laurence Collins, "On the morning of Ireland's election results..." LinkedIn, December 2024, <https://www.linkedin.com/feed/update/urn:li:activity:7269590933602545665/>

activity is now propped up by public sector employers, like Western University staff and healthcare workers, not dynamic private-sector growth.

The city's inability to draw more headquarters mirrors Canada's broader failure to incentivize business relocation, unlike Ireland, where low taxes fueled their economic growth. For companies, moving to Canada means facing a tax hit on asset sales, which reduces autonomy and ties up capital. The U.S., with its 21% federal corporate rate and larger market, or Ireland, with its tax haven status, offer better growth prospects. This leaves Canadian cities like London with trickle-down effects of limited job growth, decreasing business activity, and reliance on a handful of legacy firms. Without tax reform, Canada's business environment will continue to lag, with London's two corporate headquarters serving as a clear reminder of this.

Interviews

To hear from the perspective of current talent studying in London and planning to relocate after graduation, we interviewed Jack Tritt and Ryan Maina.⁸⁷ Jack Tritt grew up in Vancouver, BC and is currently a fourth year in the Ivey HBA/JD dual degree program. Ryan Maina grew up in Kenya and chose to study at the Ivey Business School where he is currently a third-year student. Both candidates provide experience recruiting for roles within the legal and financial industries while studying at Western University in London. These candidates are excellent case studies we can use to analyze why domestic and international talent leaves London after graduation, as they both plan to live elsewhere.

Upon graduation, Jack Tritt plans to article at a law firm in New York or Toronto while studying for the bar. Ultimately, he plans on living in a "global financial hub (that) allows for the opportunity to work with more significant clients and in a higher stakes environment." Ryan Maina is hoping to receive a full time offer from Goldman Sachs Toronto post-graduation after his internship there this upcoming summer. Similar to Jack, Ryan mentioned wanting to live in a financial hub to build a successful career in capital markets, an area London lacks opportunities in.

When asked about the prospect of staying in London post-graduation if there were more corporate opportunities, both interviewees had similar responses. If adequate career opportunities were available in London, both candidates said they would be open to establishing their careers here. However, a current lack of opportunity leaves these

⁸⁷ Jack Tritt and Ryan Maina, interviewed by Marcus Dashevsky and Luke Kemerle, March 2025.

individuals with few options other than pursuing a career in cities with established professional opportunities.

London must be wary of a potential cycle which we identified through these interviews: top talent, which would typically create new opportunities, is leaving London due to lacking career prospects. Exacerbating this issue, the proposed international student cap will lead to a smaller talent pool available to retain, leaving London with even less fresh talent.

Interviews with Director of the LEDC

The interview with Christine Wilton, Director of Workforce Development for London Economic Development Corporation (LEDC) provided valuable insights into the impact of federal policy changes on international student retention in London.⁸⁸ Throughout the conversation, Christine's perspective on supporting businesses through all the immigration changes became clear. The LEDC is responsible for attracting jobs and creating investments to the city. She explained how London, Ontario, is actively attracting foreign direct investment and addressing labor shortages by leveraging immigration, workforce forecasting, and community integration initiatives to support London's economic growth.

A key takeaway from the interview was the incentives or policy measures the city of London could implement to make London more attractive for corporate investment and talent retention, specifically towards international students. Christine illustrated that people stay where there are jobs, and London, Ontario, offers strong opportunities in specific industries like advanced manufacturing, healthcare, tech, and automation. Additionally, she referenced companies such as Carfax, Digital Extremes, and Race Roster being overlooked by students at Western. She further quotes, "If you were in engineering, I would say London's a great place because of our advanced manufacturing. We have over 500 advanced manufacturers that are all focused on automation, robotics, those types of things". Christine also raised an interesting point about London's age demographic. The city is currently facing an aging population, making it a favourable time for career openings and growth. By 2031, she reports, London will need 40,000 workers, presenting an excellent opportunity for future international graduates in the talent pool.

⁸⁸ Christine Wilton (Director, Workforce Development, London Economic Development Corporation), interview by Owen Carey-Griffin and Matthew Hobbs, March 2025.

However, this requires international students in London to be exposed to the various opportunities. By understanding the job availability in London, even though they may not be traditional Toronto-based finance jobs, there are many occupational possibilities for international graduates.

Impact of the International Student Cap

The implementation of the international student cap risks setting off a chain reaction that will make it increasingly difficult for London to retain top talent. This is evident as there were 235,880 fewer international students accepted into Canada from 2023 to 2024, thus proving a depletion of available talent (Exhibit 1).⁸⁹ As fewer international students are admitted to study in Canada, London's post-secondary institutions will see a decline in enrollment from one of their most driven and career-oriented demographics. These students not only contribute to campus diversity but also make up a significant portion of the local graduate talent pool. With fewer international students graduating in London, the city will face a reduced supply of skilled labour and weaken London's ability to attract and retain talent. The loss of talent reduces high-quality career opportunities in London, as companies will have to adjust the number of roles they offer to a reduced graduate talent pool. This leads to even more graduates leaving in search of better prospects elsewhere. Without intervention, this will result in a downward spiral, less talent leads to fewer job opportunities, which in turn drives away future talent and decreases London's business activity. This dynamic highlights the necessity to implement new strategies for students to be presented job opportunities, while further integrating them into London's society.

Recommendations

1. Immerse Work Environment with Schooling by Shifting Education Downtown

Relocating key educational institutions, including satellite campuses and specialized programs from Western University and Fanshawe College, to London's downtown. Integrating students into the city's corporate atmosphere could be a strong solution for retaining talent. This strategy mirrors Toronto's approach, where the downtown financial district hosts the headquarters of Queen's Commerce, Western Ivey, and Rotman, giving students direct exposure to their future work environment. Bridging the physical gap between students and corporations makes local career opportunities feel more accessible. For international students, who may lack familiarity with London's job

⁸⁹ Meti Basiri, "What Were the Impacts of Canada's 2024 International Student Cap?," ApplyBoard, January 22, 2025, <https://www.applyboard.com/applyinsights-article/what-were-the-impacts-of-canadas-2024-international-student-cap>.

market, proximity to businesses will help with student engagement. This immersion helps them build professional networks and recognize London as a viable career hub, reducing the allure of larger cities with strong corporate reputations.

2. Partnerships Between Universities, Colleges, and Corporations

Creating business relationships between post-secondary institutions and London corporations fosters a valuable solution to retaining the talent pipeline, as it navigates students through a professional pathway. Co-op education programs ensure real professional experience and provides a promising streamline into the long-term workplace. The city of London should prioritize facilitating and organizing these programs, rather than leaving it to corporations and institutions. This is because the city is a major stakeholder and beneficiary of this initiative. As a result, London will receive the economic and social rewards of a skilled workforce.

In addition, international students will benefit from these opportunities, where they'd often be faced with barriers such as a limited local network. By combining work experience with education, these partnerships provide students with practical skills and influence them to remain in London post-graduation. Another incentive to stay is by widening their professional network and developing meaningful connections within London.

'Why Nations Fail,' by Daron Acemoglu and James A. Robinson, argues a similar point that economic prosperity depends on inclusive institutions to provide economic opportunities and a clear path to success.⁹⁰ The proposed partnerships reflect this principle by utilizing London's educational resources to provide opportunities through professional internships. Connecting students to clear career pathways in the London area will drive economic growth.

Conclusion

The proposed international student cap will have a significant impact on London's ability to retain top talent. As identified, students like Jack Tritt and Ryan Maina are already planning to leave the city due to a lack of corporate opportunities. With fewer international students entering the city, the overall talent pool will shrink, and London will lose a key demographic that meaningfully contributes to its workforce and community. By reducing this population, London is at risk of accelerating a cycle where talent leaves, resulting in fewer opportunities and less incentive for future students to

⁹⁰Daron Acemoglu and James A. Robinson, *Why Nations Fail: The Origins of Power, Prosperity and Poverty* (London: Profile Books, 2012).

remain. These recommendations aim to address this issue by making London a more attractive and accessible place to build a career. Relocating education downtown would give students proximity to professional networks and opportunities, while formal partnerships between schools and businesses would create direct pathways to long-term employment. These initiatives are especially important for international students who may lack connections in the city. Without intervention, London may struggle to compete with larger cities, but with strategic planning, it can retain its talent and grow into a more inclusive and opportunity-rich environment.

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Tritt, Jack, and Ryan Maina. Interview by Marcus Dashevsky and Luke Kemerle. March 2025.⁶

Wilton, Christine. Interview by Owen Carey-Griffin and Matthew Hobbs. March 2025.⁷

Appendix

Exhibit 1:

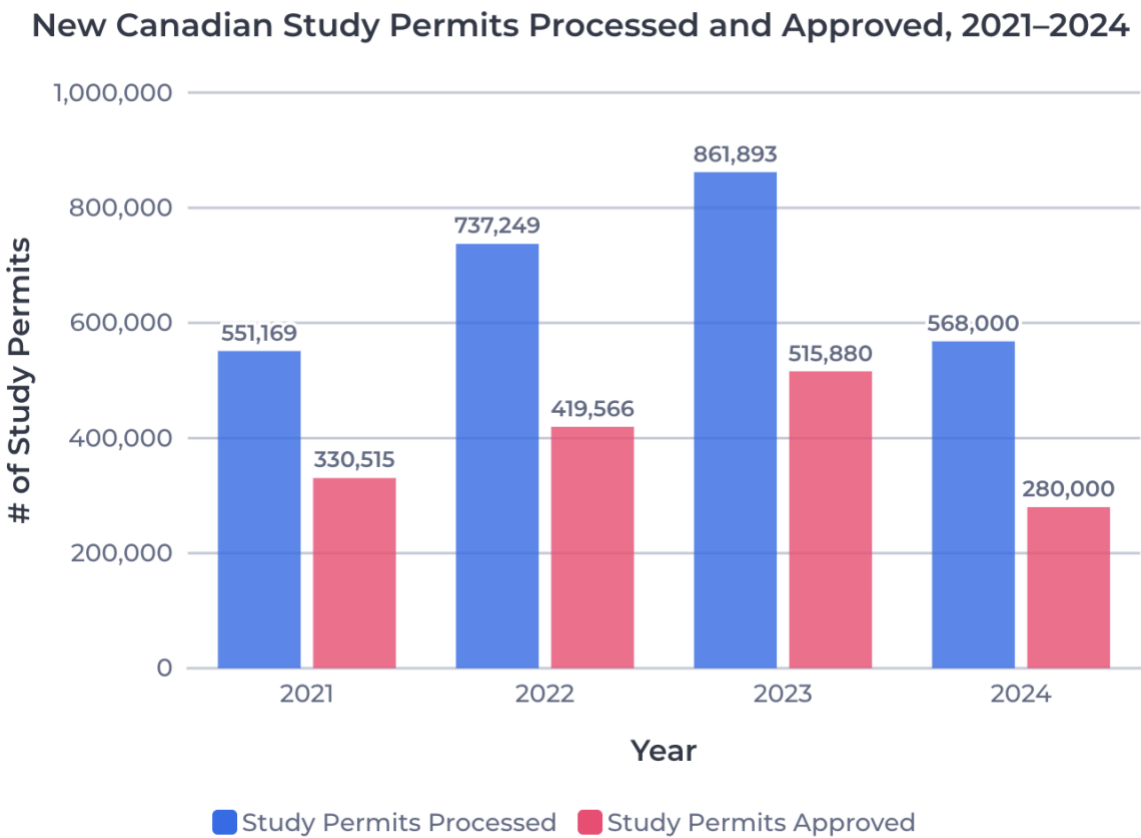
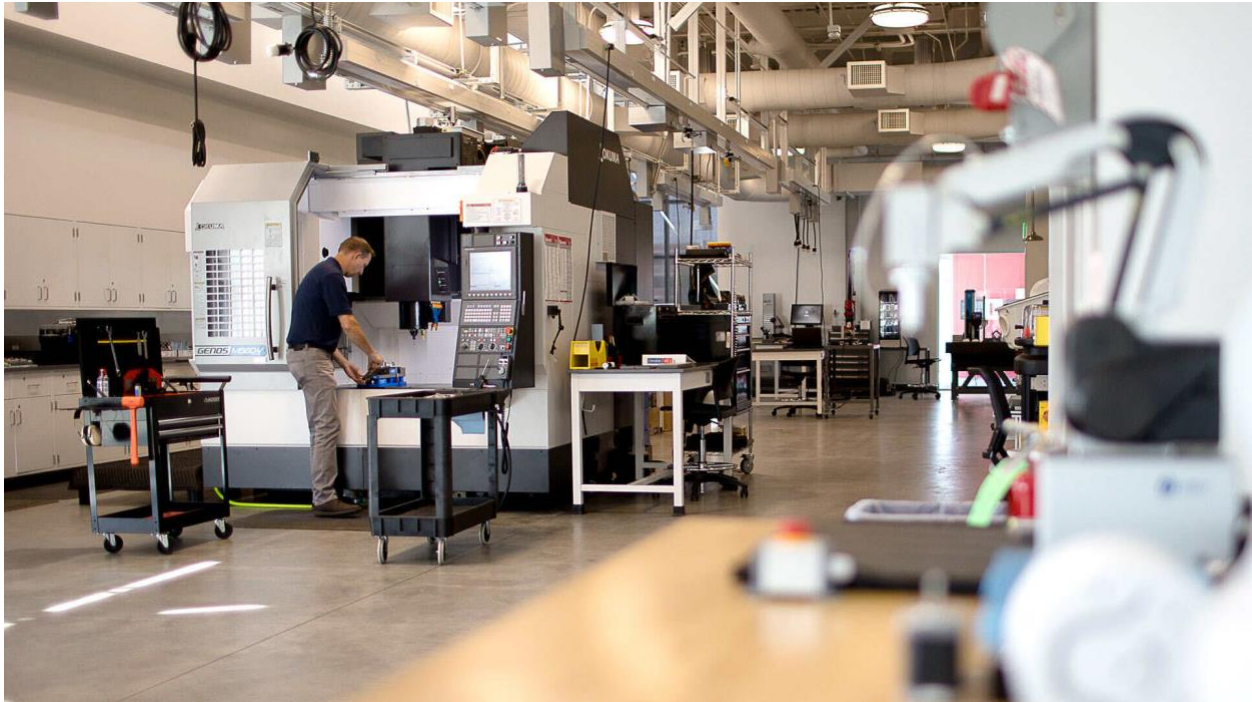


Exhibit 1: Meti Basiri, “What Were the Impacts of Canada’s 2024 International Student Cap?,” (Kitchener, Ontario: ApplyBoard, 2025)
<https://www.applyboard.com/applyinsights-article/what-were-the-impacts-of-canadas-2024-international-student-cap>.



Chapter 7: Advanced Manufacturing

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Executive Summary

London has great economic potential and room for growth, especially in the advanced manufacturing sector. It employs thousands of individuals within the manufacturing sector. It is also a city with many immigrants, which accounts for around a quarter of its population, with economic immigrants being the most common type of immigration to the city. The recent changes the federal government has made regarding reducing the number of student visas have had a negative impact, as it means it is harder for employers to fill their labour shortages. Labour shortages and the government are making it harder for the London Economic Development Corporation (LEDC) to attract and match new talent within the city with employers through reduced student visas. It means lowered productivity for employers, London's competitiveness being put at risk, and negative impact on local businesses, significantly restricting their access to new talent in a significant and growing industry. It is estimated that a reduction of immigration will make it costlier for businesses to run their operations, expand, or increase due to a labour shortage, and because there will be fewer students in the city, it also means that there will be fewer people consuming in the local businesses. It also is also extremely harmful for Western and Fanshawe, as lower enrollment levels mean colleges are more likely to cut down on degree programs.

However, there is still much room to grow to minimize the impacts of reducing student visas. We propose that employers collaborate with universities like Western. London is home to two top-level universities focused on advanced manufacturing, Western and Fanshawe, which also graduate various students and have facilities that can be partnered with employers in the advanced manufacturing sector. Through long-lasting relationships between employers and the colleges, it is more likely that the advanced

manufacturing sector can mitigate the impacts of reduced immigration. We are also calling on the City of London to invest in skill programs for anyone who resides in London to increase economic productivity, talent, and skills. Investments in these programs increase labour supply and, in the long run, help the industry grow. These investments can include tuition subsidies, apprenticeships, or incentives to hire more new graduates in London. Henceforth, a collaboration system must be implemented between the City of London, the Industry, and the Colleges to mitigate the oncoming labour market supply shock due to reduced student visas.

Context of the Problem

The advanced manufacturing sector significantly impacts London's economy as it employs over 34,000 individuals and contributes to 12% of the region's total employment.⁹¹ However, the industry is currently facing a threat with recent immigration policies, specifically the cap on international student visas, which is negatively impacting the labour market in the advanced manufacturing industry. According to Bayat, "For Canada, the stakes are equally high, given its demographic challenges and reliance on immigration for economic growth. It is imperative to align Canada's industrial policy to foster innovation, enhance productivity, and maintain global competitiveness in critical sectors", highlighting the importance of immigrants to the industry.⁹² London is a prime location for advanced manufacturing due to the geographic area being accessible to the US border and the Canadian Railway system, making production and distribution more effective and efficient. London's location along the 401 highway, a vital trade corridor that carries \$1.5 billion in trade daily, offers manufacturers direct access to 150 million consumers within a one-day drive.⁹³ According to the City of London, the manufacturing industry will continue to grow, which projects a significant increase in job openings within this sector due to expansion, current retirement, and overall demand (Exhibit 1). Furthermore, looking at the manufacturing sector within Canada in December 2024, it was the third month of sales increases to \$71.4 billion (Exhibit 2).

There are over 1,000 job vacancies in the advanced manufacturing sector, highlighting a need within the industry's labour market.⁹⁴ The limited number of international

⁹¹ Lightcast, "City of London - Manufacturing Sector Profile Highlights - 2024," 2024, https://london.ca/sites/default/files/2025-03/Sector%20Profile%20Highlights%20-%20Manufacturing%20%282025%29_0.pdf?

⁹² Sam Bayat, "Harmonizing Canada's Immigration and Industrial Policies: A Blueprint for Future Prosperity," *Caribbean News Global*, September 11, 2024, <https://caribbeannewsglobal.com/harmonizing-canadas-immigration-and-industrial-policies-a-blueprint-for-future-prosperity/>.

⁹³ *London Economic Development Corporation*, accessed March 31, 2025, <https://www.ledc.com/>.

⁹⁴ 1. Ashley Hyshka, "More than 1,000 Manufacturing Jobs Unfilled in London, Ont. Area: CME," CTVNews, November 24, 2024, <https://www.ctvnews.ca/london/article/more-than-1000-manufacturing-jobs-unfilled-in-london-ont-area-cme/>.

students who bring skills within these specialized areas heavily impacts the talent pipeline in London. Given that London has access to students graduating with qualified technical skills and that the population consists of over 25% of residents who are immigrants, the economic concerns that are coming due to the recent policy changes are highlighted. Additionally, organizations such as the London Economic Development Corporation (LEDC) play a substantial role in developing this talent pipeline as they support the advanced manufacturing industry with students who look to fill labour gaps in the current system. The current policies being implemented also harm organizations such as the LEDC, which plays a significant role in helping organizations across London find talent to continue to grow the industry.

Lastly, the new student visa limits place significant pressure on London's local businesses, limiting their options for talent in a rapidly growing and demanding industry. The implications lead to production delays and increased costs, negatively impacting London's competitive position within the advanced manufacturing sector.

Impacted Individuals and Relevance for London

During our research, our team interviewed two members of the London community. One is Siskinds The Law Firm's partner and chair of the board, Stacey Bothwell. The second is Armo Tools's head of human resources, Joe Sorocynski. These two individuals were nice enough to be interviewed, allowing us to learn more about the implications of the new policy change and its effects on the advanced manufacturing industries' talent pipeline. The interview consisted of questions about how the policy change has affected the talent pipeline for the advanced manufacturing industry in London.

Interview Questions for Stacey Bothwell

1. How does the cap on international students impact employers in the advanced manufacturing industry?
2. What long-term effects might this policy have on the advanced manufacturing industry's talent pipeline?
3. Could this policy lead to increased use of temporary foreign worker programs, and what legal considerations come with that?
4. What is the attitude towards the new cap policy, is there a positive sentiment or is there a negative feeling around the change?
5. How have businesses been impacted by the new cap change?
6. What can London do?

Interview #1: Stacey Bothwell

Our first interview occurred at Siskinds The Law Firm on 275 Dundas Street. Siskinds The Law Firm has been an established law firm in London for 93 years, with locations in Sarnia, Vancouver, Toronto, and Quebec City. Stacey Bothwell is a business lawyer with over 23 years of experience in the field. Along with being a partner of Siskinds' London location, she is also chair of the board for all Siskinds locations. While interviewing Stacey, we asked six questions, all to get a deeper understanding of the policy change effects on the talent pipeline for the advanced manufacturing industry and what that means for London's future in advanced manufacturing. Stacey's experience with business law makes her the perfect candidate for this study.

We started our discussion by talking about the cap on international students. When Q1 was asked about the cap, Stacey responded, "One of the issues really is that there becomes a shortage of talent because there are fewer graduates with these sorts of highly skilled degrees that a significant amount of international students graduate with and enter into the workforce pipeline. If you reduce the number of students graduating from those programs, obviously there's going to be a talent shortage and that is an issue that my clients appear to be considering". The implications that come with this policy change are costing manufacturing companies like ArmoTool to spend more money and effort into attracting talent. Framed perfectly by Stacey, "The natural impact of labour shortage is that compensation packages are often driven up because you have to offer more to attract the talent". The implications framed by Stacey from the cap change show us how the manufacturing industry will change into a more competitive and internally expensive space for manufacturing companies due to the shortage of international students.

The conversation shifted to a topic about the long-term effects of this policy change. When Stacey was asked Q2, she responded by providing insight into how the advanced manufacturing industry is an aging profession and why that is such a big factor. Stacey highlights some of the concerns from her clients "One of the concerns in advanced manufacturing or manufacturing in general in London is that the current workforce is comprised of an aging population and so succession planning is on the top of mind of a lot of my clients," an aging population along with a new policy change to international students is not a good mix for the long-term health of the advanced manufacturing industry in London. Stacey also discusses the pipeline, "The whole point of a pipeline is that you put people in place early and let them grow and learn so that they can replace the people who have aged out." The policy change limiting the amount of international students and an aging population of London in the advanced manufacturing industry comes with implications for the survival of the industry, summed up perfectly by Stacey

“Without a large pool of graduates or talent to choose from this affects the ability for companies to succession plan and to make sure that they're in a good place for their futures.” This highlights how the change in policy limits the amount of young talent coming into the industry, letting the industry age out and causing long-term concerns for companies like ArmoTool.

The interview shifted towards whether this policy change would increase the use of temporary foreign workers. When Stacey was asked Q3, she responded, “Yes, that is possible,” showing how advanced manufacturing companies may try to pivot due to the change. This change would come with economic implications outlined by Stacey “There are more economic factors involved for a company who uses temporary foreign workers such as relocation costs and higher salaries because they are not students coming right out of a program, they are typically established professionals.” This highlights how this policy change can cause economic obstacles for the advanced manufacturing industry.

When discussing Q4 regarding the attitude towards the policy change, Stacey gave her and her clients feelings on the change, stating, “There is more of a wait-and-see approach currently.” Showing no direct positive or negative feeling toward the policy change, the advanced manufacturing industry has not yet felt the implications of change.

When asked Q5 about the policy change's impact on the industry, Stacey said, “At this moment, there has not been a direct impact. However, one would assume that as the pipeline dries up, businesses will feel the impact because a talent shortage means more competition for candidates, which drives up costs.” This shows how nothing is felt now, but the price to pay in the future will be increasingly more expensive with the decreasing amount of international students and the need to hire domestically because of that. Stacey also said that “Manufacturing businesses in London are always looking for competitive advantages and the skills that are gained in programs that foreign students dominate have often been relied on to automate and innovate and help control or drive down costs,” this shows us how much we rely on international students in the advanced manufacturing industry and how big of an economic impact this change will make in the coming years.

Moving toward the end of the interview, Stacey was asked one final question, “What can London do?” Stacey responded with her recommendations and thoughts on how to mitigate this policy change's effect on the industry, stating, “London needs to advocate for policies that support international students and be better at educating the general public about the benefits that international students have on our businesses and our community. They add skills that lead to innovation and cultural diversity, and London

needs both.” This shows how Stacey believes the change will turn out negatively for us in the future, outlining how much international students benefit our economy and culture within the advanced manufacturing industry.

Interview Questions for Joe Soroczynski

1. Have you noticed any changes in the industry since the international student cap or the tightening of immigration policy across Canada?
2. How has the talent pipeline been for Armo Tool since you have been in HR? How has it been for the industry?
3. What tools do you use to draw talent into Armo Tool when trying to hire out of University or Colleges?
4. Have you or Armo Tool done any recruiting at the highschool level? If so, is there a younger interest in advanced manufacturing, or is it something that people don't know is even an option for them?
5. What is the average age at Armo Tool? Are you facing an age gap in your workforce and how do you think we can educate the new workforce before all the experience retires?

Interview #2: Joe Soroczynski

Joe Soroczynski is a member of the HR team at Armo Tool and heads the strategic business development arm of Armo Tool. Spending the last 4 years of his career at Armo, Joe has been making an impact working within the multiple facets of the company. At the time of the interview, Joe focused on the talent acquisition facet of the Armo tool. Joe's direct experience with the advanced manufacturing industry, specifically the human resource aspect, makes him the perfect candidate for our study. When asked about any changes in the manufacturing industry, Joe spoke about his experiences interacting with the Fanshawe talent pipeline. Joe said Armo has not seen any significant decline in talent or excitement. Citing a much larger impact coming from the type of job posting listed versus the effects of the international student cap.

When discussing the talent pipeline for the industry, Joe responded with a positive outlook. Joe stated that the industry has been growing since he entered. All job positions across the sector have had competitive applicants vying for spots as more large corporations enter the space. The largest is the Volkswagen plant, which will bring international talent into the London manufacturing space and sell the positive future ahead. When asked about the tools used to draw talent into Armo Tool, Joe restated the competitive environment and the need for simple job postings to bring people into Armo. Speaking on the high school level initiatives Armo Tool has been enacting, Joe said that

Armo focuses most of its directed initiatives at colleges, leaving high schools as a relatively untapped market.

Joe did give a unique perspective, growing up in Mississauga, Joe explained that London high schoolers were much more informed on the advanced manufacturing career. Advanced manufacturing is something high school aged youths are discussing and interested in as they look to the future opportunities available to them. When asked about the average age at Armo, Joe explained that the median is about 40 years old. Interestingly, Joe pointed out that very few people are 40 years old, with most employees older than 55 or younger than 30. This has been a common theme in the advanced manufacturing industry, with immense importance on youth training as older employees retire. Retirement is becoming more rare as many of the Armo Tool employees prefer to switch to part-time work after retirement age to keep a basic income and stay within a high-speed industry that is fulfilling and important for the continued growth of Armo and its community.

Problem and Recommendations

The Federal cap on international student visas has reduced the number of skilled graduates entering the workforce (CITE). This composes a huge problem as advanced manufacturing in London relies heavily on international student talent from the Talent pipeline. Therefore, fewer international students would result in fewer skilled graduates, causing a tighter talent pipeline.

Recommendations

To address the upcoming challenges that the advanced manufacturing sector will face due to federal policies surrounding the international student visa cap, this industry must ensure that collaborative solutions are in place to keep the industry growing. The following recommendations are proposed:

The first proposed recommendation is to strengthen the alignment between post-secondary education and industry needs. Since London is home to world-renowned Universities such as Western University, leveraging these partnerships can help reduce the labour shortage and continue to expand the talent pipeline. Universities play a critical role in preparing students in high-demand industries such as the Advanced Manufacturing sector, therefore, with the recent policy changes surrounding international student visa caps, organizations and educational institutions need to collaborate more than ever to ensure that these incoming policies do not negatively

impact the talent pipeline and labour market.⁹⁵ Utilizing partnerships for more educational placements, internships, and research projects can allow students and organizations in the Advanced Manufacturing industry to gain experience and connect with individuals within their sectors.

Within this collaboration, educational institutions should also work towards curriculum development that adapts to the industry's needs. According to Western University, they have explicitly focused on “automotive, defence, green energy, aerospace and building products sectors, Western offers access to leading personnel and facilities at three main centres, which continue to be at the forefront of their fields: the Fraunhofer Innovation Platform for Composites Research (FIP) @ Western, Surface Science Western (SSW) and Additive Manufacturing Western (AMW)”.⁹⁶ By leveraging programs that align with industry needs, students are more likely to be equipped with the skills and experience necessary to navigate the specific challenges they will encounter in the workplace.

Overall, by creating long-lasting connections and partnerships between local universities and organizations to build an ongoing talent pipeline that can equip future students with the necessary skills to thrive in the workplace.

The second recommendation would be for the City of London to invest in skill programs for residents to increase talent and build long-term workforces. Investing in programs to build the necessary skills for individuals to work within the advanced manufacturing sector can further improve the talent pipeline and help keep the industry growing. Collaborating with employers to help individuals build the necessary skills can help reduce the ramifications and impact of the international student cap, which is harming the industries' growth.

With the current scope of international student visas in Ontario reducing from 235,000 in 2024 to 141,000 in 2025, it's clear that the advanced manufacturing industry will have to rely on other methods to attract talent to keep up with demand.⁹⁷ One approach that the City of London can take is to fund incentives and provide tuition subsidies for apprenticeships and micro-credentialing to balance skill acquisition while being flexible to ensure that the growth within the industry does not plateau. This investment can help bridge skill gaps and provide opportunities for individuals not previously considering

⁹⁵ Alain Pescador, “Navigating Change: Canada’s Decision to Cap International Student Permits and Its Global Impact,” *Boyden Executive Search*, accessed March 31, 2025, <https://www.boyden.com/media/navigating-change-canadas-decision-to-cap-international-student-37575637/>.

⁹⁶ “Advanced Manufacturing,” *Western University*, accessed March 31, 2025, <https://uwo.ca/advancedmanufacturing/index.html>.

⁹⁷ “Ontario Continues Allocating International Student Applications to Support Labour Market Needs,” *Ontario Newsroom*, January 23, 2025, <https://news.ontario.ca/en/release/1005623/ontario-continues-allocating-international-student-applications-to-support-labour-market-needs>.

careers within the Advanced Manufacturing industry. This approach is advantageous for the City of London due to London's geographic location within the competitive market, continuing to make them a key player within the industry across the nation. By strengthening the technical capacity of the local workforce, London will be better positioned to meet current and future demands within its advanced manufacturing sector.

Concluding Summary

London is a hub for advanced manufacturing, housing 434 companies in the sector and employing 12% of London Ontario's workforce.⁹⁸ Though London is located near the U.S. border, the federal government's cap on international student permits removes that advantage by shrinking the talent pipeline. Our research points to two paths toward a better future. First is building stronger ties between local universities and the industry. Second, the City of London should fund skills training for residents. Both of these ideas aim to fill the opening left by decreasing international graduates while growing a workforce that can keep the city competitive. Interviews with Stacey Bothwell and Joe Soroczynski added relevance and reinforced the strength of our research. Stacey's broad economic insights are invaluable to viewing the internal structures of London's corporations. Joe's hiring and development experience highlighted the resilience of advanced manufacturing in one of London's larger firms (ArmoTool).

The visa cap doesn't just hit manufacturers, it hurts shops, restaurants, and institutions as fewer students choose to invest in London through enrollment or local spending. This policy change won't immediately affect the labour market but will have significant consequences on the long-term talent pipeline within the advanced manufacturing sector in London. Addressing this challenge requires a multi-step approach that includes strengthening partnerships with local universities and promoting the advanced manufacturing industry for residents of London through upskilling programs.

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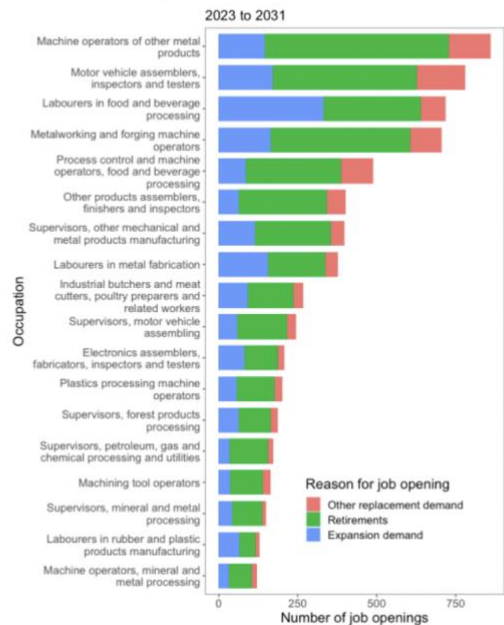
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Appendix

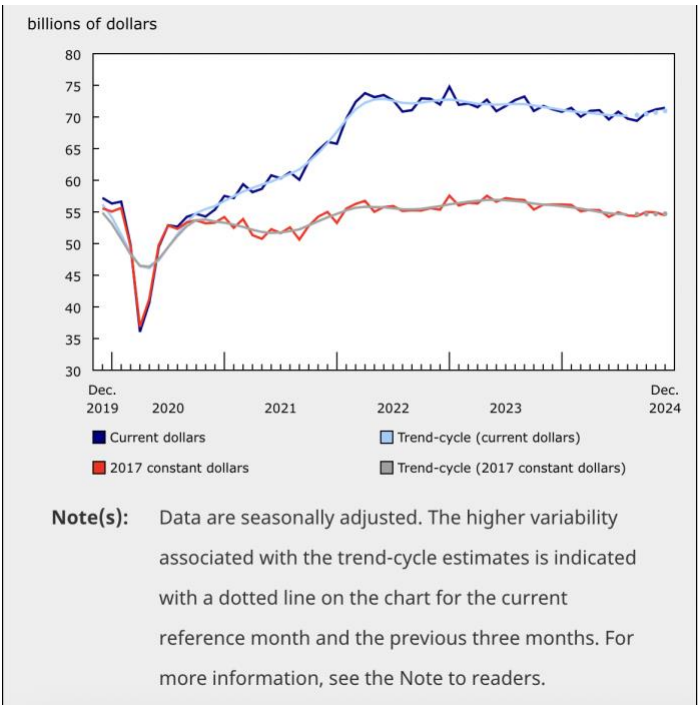
Exhibit 1: Projected Job Openings (City of London)

Graph 6: Projected Job Openings in Select Manufacturing Occupations in Elgin-Middlesex-Oxford, 2023 to 2031



Source: Employment Prospects 2023-31: London Region's Advanced Manufacturing Sector²⁸⁵

Exhibit 2: Manufacturing Sales in Canada





Chapter 8: Non-Profit, Philanthropy, and Charitable Sector

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Executive Summary

This chapter examines how the recent policy change on immigration and international students impacts the talent pipeline in the non-profit, philanthropy, and charitable sector. This chapter will break down the statistics regarding international students and immigrants in relation to work in the sector. Maureen Cassidy states that 47% of immigrants work in the non-profit sector⁹⁹. In addition, StatsCan (Exhibit 1) shows that over 60% of total non-profit employees hold a college or university degree¹⁰⁰. We also aim to establish an existing gap and need for talent in the sector, proving that these new policy changes will be detrimental for London. Additionally, the impact of the policy change within London will be discussed using various sources including interviews with Maureen Cassidy (Chief Executive Officer (CEO) of Pillar Nonprofit Network), Andrew Chunilall (CEO of Community Foundations of Canada) and Diane Silva (CEO of London Community Foundation). Based on these findings and implications, we will offer London policymakers actionable recommendations to mitigate the impact of international student policy changes on the nonprofit sector. These recommendations will encourage proactive policy measures to ensure this sector in London will remain strong, diverse, and well-staffed.

The Context

In Ontario, 31% of workers in charitable organizations were immigrants as of 2021.¹⁰¹ If this is applicable and distributed evenly throughout the province, this means that one third of the sector workers in London are immigrants. It is also possible that these immigrants began their journeys in Canada as international students. Specifically, as earlier chapters have mentioned schools in London such as Western University and its affiliates, as well as Fanshawe College, are big drivers for students international students in London. Within their own school communities, students contribute to various organizations and charities through school clubs, fundraisers, and more. Of the 42,148 students that attend Western¹⁰² (as of May 2023) and the 21,000 students that attend Fanshawe, over 15,000 of them are international students, which is why this is a pressing matter.¹⁰³

Additionally, there has been a change in talent in the nonprofit, philanthropy, and charitable industry. As many Canadians know, Canada is an ever-evolving country that

⁹⁹ Maureen Cassidy (CEO Pillar Nonprofit Network), interviewed by Mikhaila Chunilall and Heidi Locking, March 21, 2025

¹⁰⁰ Statistics Canada "An Overview of the Nonprofit Sector in Canada, 2010 – 2020"

¹⁰¹ Government of Canada, "Immigration matters in philanthropy"

¹⁰² Western University "Facts and Figures"

¹⁰³ Fanshawe College "Fanshawe Facts"

is becoming continually diverse. This applies to the city of London as well. There has been a shift in residents who choose to stay in London. Over the years we have welcomed refugees, seen increasing numbers of international students, and more. As such, it is important that the talent in this sector reflects what we are seeing in the community. In an interview with Andrew Chunilall, he said, “When I look around at volunteerism, and who sits on the board of directors of these organizations, even the leaders themselves, we’re starting to see a lot more diversity, and that’s a really wonderful thing. Because now the organizations are starting to look like the communities which they serve”¹⁰⁴. It is important for organizations in the philanthropy, non-profit and charitable sector to represent the communities which they serve, otherwise it may become a barrier for their beneficiaries.

Unfortunately, there has also been an increasing gap in the talent available to work in this sector in London. Earlier in the year, organizations such as Pillar Nonprofit Network and the London Salvation Army have made pleas to the public to ask for support and volunteers. The decline in support for this industry has been described as a “top three concern”¹⁰⁵. It is also no secret that the nonprofit sector often loses employees to the private sector. Many charitable organizations recognize that they are unable to pay their employees what the private sector would pay due to budget constraints, so many of these organizations resort to recruiting students and immigrants.

Another important fact that is often not just overlooked, but unknown, is the significance immigrant women play in the nonprofit, philanthropy and charitable sector. Approximately 50% of immigrant women who are employed in Canada work in the nonprofit sector.¹⁰⁶ Imagine Canada states that these women are more likely to start their career in the nonprofit sector, as well as start a nonprofit and succeed compared to other Canadians.¹⁰⁷ What really differentiates these women starting their organization from the rest of Canadians is that their primary goal is not to create wealth. These women are looking to support their families and improve their community. By decreasing international students, we lose these inspiring, talented women who move to work in the nonprofit sector and bring much value to the community.

Imagine Canada also highlights in their 2024 report that 60 % of multicultural Canadians view charities and nonprofits in a positive manner. About 80% of these multicultural Canadians donate to charities despite the economic constraints and increased cost of living. Trends show the longer they are in Canada, the more money they are willing to

¹⁰⁴ Andrew Chunilall (CEO Community Foundations of Canada), Interviewed by Mikhaila Chunilall, March 17, 2025

¹⁰⁵ Bieman, “London agencies ask: Where have all the volunteers gone?”

¹⁰⁶ Cassidy, 2025

¹⁰⁷ Imagine Canada “Navigating New Horizons: The Contributions and Perspectives of Multicultural Canadians 2024”

donate. The average amount this group donates was approximately \$795 in 2023. These facts, “suggest that to further engage multicultural Canadians in charitable giving, and to engage meaningfully, it is crucial to address the challenges and feelings of exclusion faced by immigrants, particularly those in their early years in Canada”¹⁰⁸. Multicultural groups are willing to contribute to charities, but we cannot ignore the sense of exclusion these groups feel which will only exacerbate with this international student cap.

Relevance for London

When it comes to London, these statistics combined with the existing talent gap and need for more workers, the recent policy changes do not bode well. With 31% of our workers in the nonprofit, philanthropy and charitable sector being immigrants, we will likely see an increased need for workers and talent locally.

Looking specifically at the root of the problem, immigrants that end up in roles in this sector will typically have come to London originally to pursue an education at either Western University or Fanshawe College. These schools both have various programs and partnerships with organizations in this sector. For instance, in an interview with Maureen Cassidy, she mentioned that Pillar has a partnership with Huron University College whereby they attract interns and new talent through the affiliate. These programs are vital for bridging the existing gap, and with a decrease in international students, this will become difficult.

Additionally, as previously mentioned - London has been an evolving city which is constantly welcoming immigrants, international students, and refugees. It is important for the organizations that operate within this city and support these people, to reflect their community. Silva emphasizes that when we receive newcomers, there are several organizations that play a crucial role in helping them gain employment skills, or that simply just help them feel welcome. This may come in the form faith-based organizations, cultural organizations, or simple community groups. When new immigration policies such as this come into effect, we “compromise the advancement of... newcomers and how they progress in this Canadian context.”¹⁰⁹ So not only will there be detrimental impacts to the sector itself, but also to those who operate and find value within it.

¹⁰⁸ Imagine Canada “*Navigating New Horizons: The Contributions and Perspectives of Multicultural Canadians 2024*”

¹⁰⁹ Diane Silva (CEO London Community Foundation), interviewed by Mikhaila Chuniwall, March 26, 2025

Another important factor to consider is that nonprofit and charitable organizations have constraints on their budgets and their ability to pay their employees. In his interview, Chunilall said, “One of the challenges with working in the nonprofit sector is it's not very appealing to most people in part because well, there are several issues that the pay and the nonprofit sector is certainly less for comparable work when you look at the private sector or in government jobs.”¹¹⁰ As such, there is to an extent, a reliance on students and newcomers to Canada to fill positions. When these students come to Canada, (or local students) and they are job searching, it can be harder for them to enter the job market, even if they have the experience and education required. Because of the need to make money and support themselves and their families, organizations in the sector are often what these students are drawn to and where they end up in. Consequently, the new policy changes surrounding the cap on international students will gravely impact the attraction and retention of human capital for organizations.

Building on Chunilall's point, talent in the sector can often find better pay for similar or comparable jobs in different sectors such as the private or public sectors. This leads to higher turnover in the sector as employees will seek better pay for the work they are doing as they gain more experience and have more leverage when looking for jobs. Cassidy described Pillar as “a launching pad and a landing pad.”¹¹¹ This symbolizes that the sector often attracts those who are at the beginning of their career to gain experience and show their talents, after which they “launch.” Additionally, the sector is a place where those in the stages of retirement who have time to give and to support the sector, tend to spend time. Although the sector, and Pillar specifically, has accepted this, it can be a detrimental aspect to the industry. Thus, the reduction of talent availability will only exacerbate this issue.

As these new policy changes have just been put in place, it is hard for individual organizations to demonstrate how it has affected them or how it will in the future. However, drawing on the Section 1 chapter of this journal titled, “Trends in International Enrollment”, we can see at Western that there has already been a decline which will no doubt be impactful. In 2019, we saw a peak in enrollment of international students for the Social Sciences department. After that year, there was a major decline, likely due to the COVID-19 pandemic. Since then and since the ability to safely travel to Canada and study here has been restored, there are still declines. Within the Social Sciences departments is education in various disciplines that can often lead to careers in the nonprofit, philanthropy, and charitable sector. The continuing decline will ultimately lead to high employee turnover and difficulty to attract talent.

¹¹⁰ Chunilall, 2025

¹¹¹ Cassidy, 2025

London has a lot to offer to newcomers. There are optimal business opportunities, access to world class healthcare, outstanding educational institutions, rich ethno-cultural and faith-based organizations, events and activities, and easy access to recreational and environmental experiences¹¹². According to this same report, 93.8% of London residents reported that they were satisfied or even very satisfied with their life.¹¹³ The bottom line is that international students bring so much to our London community, and they have the ability to thrive here. International students enrich London's cultural diversity through the charitable sector, and have opportunities to open new charitable organizations, benefiting Londoners.

Conclusion & Recommended Next Steps

As previously stated, it is evident that the cap on international students will worsen the talent gap in the nonprofit, philanthropy, and charitable sector in London. In particular, there will likely be a reduction in support for social services, community support programs, volunteer-based organizations, faith-based organizations, on-campus charities, and more. These organizations are vital in contributing to a diverse, welcoming, and strong community in London. Consequently, as we begin to observe the impacts, there will be increased pressure on City Hall to fill these gaps and prevent negative effects.

What Can London Policy Makers Do?

First, it is known that organizations within the nonprofit sector are often overlooked compared to organizations in the private sector. Nonprofits are seen everyday aiding the community in times of crises (RedCross, Food Banks, etc). Oftentimes, these crucial non-profits do not get the recognition until these times of crisis are present. Pillar Non-Profit CEO says, "We should be strengthening the non-profit sector when we're not in a crisis so that the sector is ready and we're always nimble"¹¹⁴. With such a drastic number of employees being international students and immigrants, the immigration cap will only make measures harder for these organizations to control. To be prepared for a crisis these organizations need dependable staff, which they have with their international and immigrant staff. As such, data collection and monitoring on the workforce in this sector may need to be implemented. If this information is readily available, the City of London would be able to assess the policy's impact. To do this,

¹¹² London and Middlesex Local Immigration Partnership "London and Middlesex County, Ontario: Welcoming Communities and Welcoming Workplaces"

¹¹³ London Middlesex and Local Immigration Partnership

¹¹⁴ Cassidy, 2025

regular surveys can be implemented. This would allow for the city to determine the cause of hiring challenges and how these changes are evolving over time.

As much as it is important to be prepared before a crisis and implement upstream solutions, it is also important to have programs in place to strengthen the sector. As previously mentioned, nonprofits, philanthropy, and the charitable sector have certain budget constraints which is a large reason why they are reliant upon international students and why employee turnover is below average. Chunilall mentioned in his interview that partnerships with colleges and universities were a vital way to combat this issue. However, it would be difficult for certain nonprofits to pay for this and work it into their budgets. To overcome this, we are recommending an internship program that is created and run by the City of London. This would possibly allow for better pay, meaning better employee retention and international students as well as local students would know of clear pathways to employment in the sector.

To further strengthen the issue of budget constraints on organizations in the sector, we would advocate for even more financial support from the city. Grants and scholarships from the municipal government would be beneficial for nonprofits that hire large amounts of international students and immigrants. As well, scholarships in certain programs at schools that create students who eventually work in this sector, would be transformative. As highlighted earlier, there has already been a decline in the enrollment of students in the Social Sciences department at Western University. If the City of London could provide grants and scholarships like these, it would make enrollment in these schools, and this program specifically, more attractive to them. This would result in increased talent and better workforce retention.

The above recommendations are strong and important, and another equally important aspect to having international students present in an organization is the diversity. As extensively discussed throughout this report, having diverse organizations representing the diverse communities it serves is critical. There should also be an emphasis on immigrant women in the non-profit sector as over 50% of immigrant women who are employed in Canada work in the nonprofit sector. It has also been proven that these women are more likely to succeed in starting a non-profit. This international student cap will limit the number of international students that are women working in the non-profit, charitable and philanthropic sector. We should be encouraging women international students to get involved in the non-profit sector and start non-profits. This cap on international students is doing quite the opposite of this.

In addition to encouraging more women immigrants and international students to start their non-profits, it is also crucial to address the exclusion and concerns multicultural

groups face in Canada. As mentioned, multicultural Canadians view charities in a relatively positive manner; however, with this immigration cap, it may bring feelings of skepticism and hesitation. The city of London needs to ensure that multicultural groups feel welcomed and that this is their home too.

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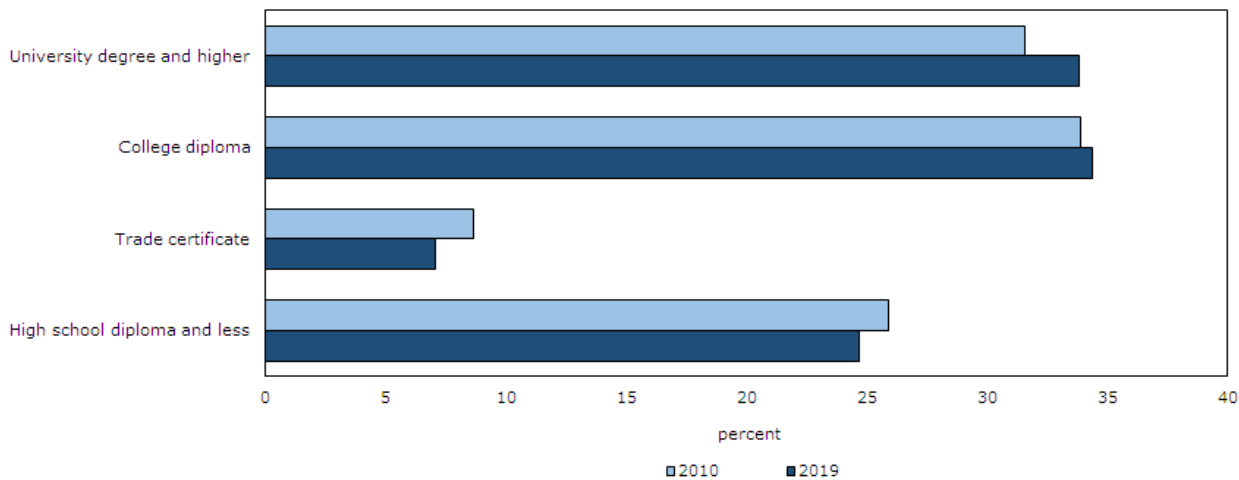
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Exhibits

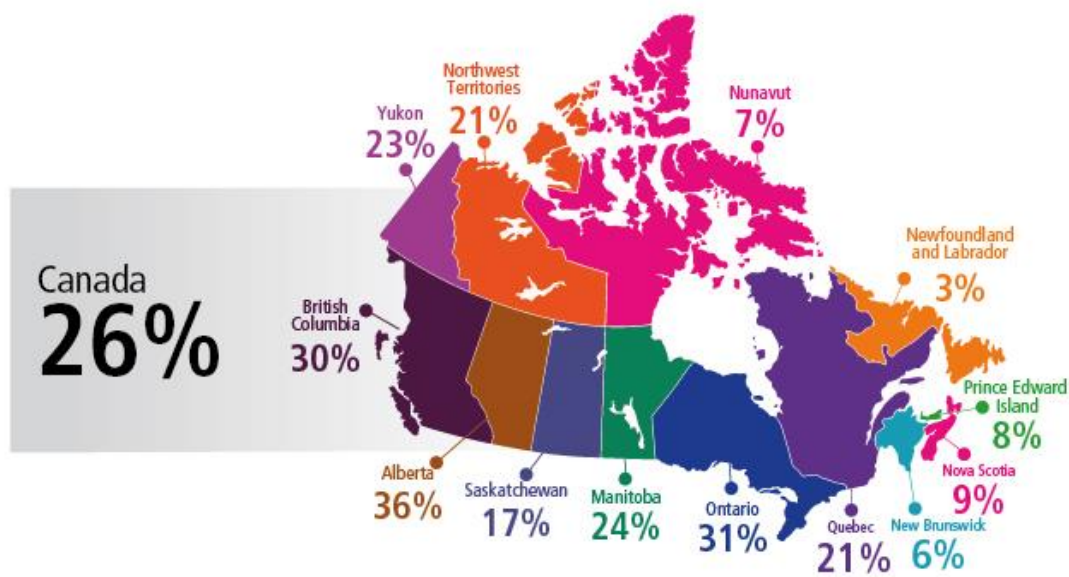
Exhibit 1: Percentage of jobs by education level, non-profit institutions, Canada 2010 and 2019

Chart 16
Percentage share of jobs by education level, non-profit institutions, Canada, 2010 and 2019



Source(s): Statistics Canada, table 36-10-0651-01.

Exhibit 2: Percentage of immigrant workers in social services and charitable organizations across Canada (2021)





Chapter 9: Early Childhood Education

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Executive Summary

The new federal policy limiting international student visas inflicts direct challenges to the city of London's economy. International students contribute substantially to the City of London and its professional talent pipeline, impacting the local economy directly. Roughly \$200 million was put into the London economy at the cost of 15% of post-secondary enrollment being international students in 2023. The visa restriction will drop international student intake by 30% in the coming years, directly threatening sectors that rely on international students' skills and involvement. Through the research conducted based on secondary data, primary research and interviews, this chapter will investigate London's early childhood education (ECE) industry, which is particularly impacted because 20% of childcare employees are international student graduates.

The early childhood education sector demonstrates how federal and provincial policies are misaligned—most notably, the province's push for affordable \$10-a-day childcare and the federal restrictions limiting one of the key talent sources needed to make that plan work. An interview with Wai Yee Chan, an international student in Fanshawe's ECE program, shared the struggles of cultural, financial, work, and study balance. Chan discusses her commitment to academics and those alike but also mentions that many students' primary cause for enrollment is immigration, which impacts long-term employment retention.

The restriction on the number of visas threatens London's economy and has a specific impact on many sectors in the city. This paper provides recommendations, which include advocating for policy revisions, improving domestic enrollment and recruitment, supporting disaffected industries, and improving the ability to retain current international students through better support and pathways to employment.

Relevance to London

The recent federal cap on international student visas poses a significant challenge to the City of London, Ontario—particularly in sectors that depend on international talent to fill persistent labour gaps. Most critically, this includes early childhood education (ECE), where workforce shortages threaten the city's ability to meet the needs of young families and realize the goals of the \$10-a-day childcare program. According to the London-Middlesex Child Care and Early Years Service System Plan (2024–2028), London will need at least 400 more Registered Early Childhood Educators (RECEs)

over the next decade.¹¹⁵ Yet, despite this projected growth, ECE programs at institutions like Fanshawe College face potential enrollment disruptions due to the new visa restrictions.

International students make up a substantial share of ECE program cohorts in Ontario—about 50% of all ECE enrollees nationwide are international.¹¹⁶ Fanshawe's 2023–2024 Annual Report even notes the College's concern about how the visa cap may limit future enrollment increases.¹¹⁷ If fewer international students can study and remain in Canada after graduation, London's ability to meet its local childcare needs could be seriously undermined. These students not only fill classroom seats but also complete practicum placements in local daycares and often transition directly into the city's workforce. A loss in their numbers directly reduces the talent pool that London relies on.

This issue is further compounded because London is already struggling with childcare accessibility. As of 2023, only 37% of Ontario children under the age of six were enrolled in regulated childcare, compared to the national average of 44%.¹¹⁸ Long waitlists and understaffed centres are not uncommon, and the city has acknowledged the urgent need to expand licensed spaces. But spaces alone do not ensure access—staffing is equally, if not more, critical. Without RECEs to work in these facilities, physical expansion is meaningless.

Furthermore, London is not just facing pressure in the ECE sector. A shortage of qualified RECEs can potentially affect multiple industries across the city, particularly those that rely on accessible, affordable childcare to support their workforce. When families cannot access care, parents—especially women—may reduce their work hours or leave their jobs altogether, leading to broader disruptions in London's local labour market.¹¹⁹

For instance, in financial services, reduced childcare access can limit participation from parents in full-time roles. A 2021 PwC report noted that nearly 30% of women in the

¹¹⁵ City of London and Middlesex County, *London-Middlesex Child Care & Early Years Service System Plan 2024–2028* (London: City of London, 2024), 38–39, <https://london.ca/sites/default/files/2024-06/2024-2028%20London-Middlesex%20CCEY%20Service%20System%20Plan%20Final.pdf>.

¹¹⁶ CBC News, "Ontario Colleges Warn Work Permit Changes Could Worsen Child-Care Staff Shortages," *CBC News*, October 29, 2024, <https://www.cbc.ca/news/canada/toronto/work-permit-changes-childcare-staff-shortages-ontario-1.7366635>.

¹¹⁷ Fanshawe College, *Annual Report 2023–2024* (London, ON: Fanshawe College, 2024), https://www.fanshawec.ca/sites/default/files/2024-06/Fanshawe_College_Annual_Report_2023-24.pdf.

¹¹⁸ Lindsey Charters and Leanne Findlay, "Access to Regulated Child Care in Canada, 2023," *Statistics Canada*, 2024, <https://www150.statcan.gc.ca/n1/pub/11-627-m/11-627-m2024004-eng.htm>.

¹¹⁹ City of London and Middlesex County, *London-Middlesex Child Care & Early Years Service System Plan 2024–2028* (London: City of London, 2024), 38–39, <https://london.ca/sites/default/files/2024-06/2024-2028%20London-Middlesex%20CCEY%20Service%20System%20Plan%20Final.pdf>.

London Economic Region were restricted from working due to childcare needs.¹²⁰ In advanced manufacturing, shift-based schedules depend on extended childcare availability, which becomes less viable when staffing shortages enforce cutting hours. The tech sector also feels this strain, especially among startups or international recruits balancing childcare with demanding hours.

Meanwhile, hospitality and transportation industries rely heavily on workers available for evenings and weekends—when regulated child care options are already scarce. If ECE shortages continue, these sectors may struggle to retain and schedule employees. Even the nonprofit and volunteer sector is impacted, as fewer parents are able to offer their time to community causes.¹²¹

This is further complicated by the federal cap on international student visas, which threatens to reduce the population that helps fill these workforce gaps. In 2023, international students made up approximately 15% of London's post-secondary population and contributed an estimated \$200 million annually to the local economy.¹²² These students often study in high-need fields—like ECE, manufacturing, or tech—and remain in London to live and work after graduation. Without them, the city risks more profound shortages not only in child care and the broader economic landscape.

What makes this particularly concerning is the misalignment of policies at different levels of government. On the one hand, the province is expanding access to affordable childcare, placing pressure on municipalities to increase spaces and staffing. On the other hand, the federal visa cap restricts one of the primary sources of new RECEs entering the field. While some recent updates have clarified that ECE programs are exempt from the cap, the initial confusion—and continued limits on work permits—has already dissuaded many prospective students. As our interview revealed, this policy uncertainty adds to existing challenges that international students face: cultural barriers, financial strains, and unclear post-graduation pathways.

In a city like London, where demand for childcare is growing and workforce shortages are well-documented, this contradiction is more than a policy oversight—it's a threat to local development. City Hall's decision to commission this report recognizes that tension. By narrowing in on the ECE sector as a case study and situating it within

¹²⁰ PricewaterhouseCoopers LLP, *Labour Market Participation in the London Economic Region* (London, ON: City of London, 2021), 11, <https://london.ca/sites/default/files/2021-08/Labour%20Market%20Participation%20in%20the%20London%20Economic%20Region%20PwC%20Report%20%28AODA%29.pdf>.

¹²¹ Based on project team research and correspondence with King's University College.

¹²² London Economic Development Corporation, *Workforce Indicators*, accessed March 9, 2025, <https://www.ledc.com/workforce-indicators>.

broader local trends, this chapter offers concrete evidence that London's ability to grow sustainably hinges on how national policy is translated on the ground.

Methodology

For this research, a mix of secondary data analysis and primary data collection will be used to understand the trends in international enrollment in post-secondary institutions in London, specifically in the ECE sector. The goal is to examine how changes in enrollment, immigration policies, and labour market trends affect the availability of ECE professionals and, in turn, the daycare industry.

Data Collection Approach

1. Secondary Data Analysis

The research relies on various reports, statistical databases, and media articles to track enrollment trends and labour market conditions. The primary sources include:

- Reports from the London Economic Development Corporation (LEDC) and the London-Middlesex Child Care Service System Plan to understand the demand and supply of ECE professionals.¹²³
- Annual reports from Fanshawe College to see how international student enrollment in ECE has changed over time.¹²⁴
- Government data on immigration policy changes, particularly the recent cap on international student intake and its effects on post-graduation work permits.¹²⁵
- News articles and industry reports discuss the retention challenges for ECE professionals, particularly salary concerns, job satisfaction, and policy-driven barriers.¹²⁶

2. Primary Data Collection

The authors conducted an informational interview to complement our secondary data and get firsthand perspectives. This included:

¹²³ City of London and Middlesex County, *London-Middlesex Child Care & Early Years Service System Plan 2024–2028* (London: City of London, 2024), <https://london.ca/sites/default/files/2024-06/2024-2028%20London-Middlesex%20CCEY%20Service%20System%20Plan%20Final.pdf>.

¹²⁴ Fanshawe College, *Annual Report 2023–2024* (London, ON: Fanshawe College, 2024), https://www.fanshawec.ca/sites/default/files/2024-06/Fanshawe_College_Annual_Report_2023-24.pdf.

¹²⁵ Government of Canada, "Who Can Apply: Work in Canada After You Graduate," Immigration, Refugees and Citizenship Canada, last modified February 22, 2025, <https://www.canada.ca/en/immigration-refugees-citizenship/services/study-canada/work/after-graduation/eligibility.html>.

¹²⁶ Allison Jones, "Ontario Colleges Warn That Work Permit Changes Will Stunt \$10-a-Day Child-Care Program," *Global News*, October 29, 2024, <https://globalnews.ca/news/10837019/ont-international-eces/>.

- The team interviewed an international student in Fanshawe's ECE program to learn about their experiences, challenges, and career aspirations (specifically in relation to ECE work).

3. Analysis Plan

We will categorize our findings into key themes:

- Trends in ECE enrollment (both domestic and international).
- Impact of international student policies on enrollment and retention
- Labour shortages in the daycare sector due to ECE workforce gaps
- Perspectives from stakeholders on recruitment, retention, and career prospects

This analysis includes a combination of descriptive statistics, responses from interviews, and policy analysis.

Research Findings from the Interview

An interview was conducted with Wai Yee Chan—English name Polly—an international student in her second and final year in the Early Childhood Education Program at Fanshawe College. A mother and visitor to Canada, she balances education with various other responsibilities. She sees this challenge from the perspective of a potential victim of these changes, and through the interview, information on how she has managed and navigated the challenges was obtained.

This interview was arranged over Zoom, and she was emailed questions in advance so that she might be prepared; this list of questions can be seen in Exhibit A. Through these targeted questions, much has been learned about Polly's life and situation. She is an immigrant from Hong Kong who immigrated through the Hong Kong permanent residency pipeline, although she has also previously lived in England. In London, Ontario. She lives with her husband and children.

Prompted to analyze the challenges international students face in the ECE program at Fanshawe, she provided a structured three-point answer:

First, international students face cultural barriers. For her, a major change was a woman's role in child-rearing. In Hong Kong, cultural norms transfer the responsibility for looking after children to affordable outside help. Whereas in Canada, that burden, due to financial and cultural differences, is placed more on the parents and mother in particular. Such differences add a barrier to international students simply seeking an education.

Secondly, financial barriers exist. For someone coming/arriving from Hong Kong, living in Canada was her first time feeling poor. Working hours are fewer in Canada, pay is less competitive, and preferred foods such as noodles are more expensive, so even diets must adapt. Furthermore, chronically high rent prices in London make the cost of living particularly hard on immigrants.

Thirdly, the work-study balance was noted as being very difficult to manage. She has found that balancing raising her children, studying, and working is an extreme challenge, and she would not be able to study without outside help to watch over her children. Critically, although she noted that resources are available in London and even that residents are aware of them, such information is challenging to locate for international arrivals; accessibility is a prominent issue.

On other questions, she noted that international students can feel very alone in having to carry the burden of their education. This is reflected in the government subsidizing domestic tuition and having to live in a new city. She felt very homesick, and cultural barriers only added to this. Students' perceptions are fundamental when encouraging retention.

Notably, although research indicated that ECEs were uncertain of the impact of the international student cap on their post-graduate prospects, Polly did not feel worried. This can be due to several factors. First, the federal government had already announced earlier in the year that ECEs were exempt—after a period of uncertainty—and secondly, she chose to get into ECE voluntarily, and her visa is not dependent on it.¹²⁷ As she arrived through the Hong Kong pathway, her decision to get into the field is not the sole reason she is in Canada, and her permanent residency is not at stake.

Inquiring about what brought her to Canada, she noted that government support for medical expenses and early education were the main drivers for her and her family. She chose London, Ontario because she felt it would be a good place to raise her children. It contrasts sharply with her home nation's intense youth study culture, and she noted the positive aspects of Canadian "open-mindedness."

During her program, she felt that students' motivations had changed negatively between her two years. Although she did not see the number of enrolments drop, she believes many people are only present at Fanshawe to get a permanent residency and that once their program is over, they will simply leave the industry. Her recommendation as one in

¹²⁷ Government of Canada, "Who Can Apply: Work in Canada After You Graduate," Immigration, Refugees and Citizenship Canada, last modified February 22, 2025, <https://www.canada.ca/en/immigration-refugees-citizenship/services/study-canada/work/after-graduation/eligibility.html>.

the system was to focus recruitment efforts on students who wanted to stay in the industry long-term.

The interview with Polly provides a clear takeaway: Supports for students are inaccessible and difficult to find due to the cultural, financial, and work-life balance issues international students face. Furthermore, many students enrolled in the program are not motivated to continue in the industry, even after they obtain their diploma.

Analysis

To evaluate the implications of the federal cap on international student visas, a range of course-related tools can be applied. The model of causation helps identify how the cap has led to a decline in enrollment in post-secondary programs such as Early Childhood Education, resulting in a reduced pool of qualified candidates for childcare roles. This contraction contributes to broader childcare workforce shortages, limiting the availability of daycare spaces and restricting parental participation in the labour market. The shortage disproportionately impacts women, who are more likely to exit the workforce due to childcare inaccessibility, producing a broader economic impact across industries. Moreover, the federal cap exacerbates a misalignment between federal and provincial policies, as provincial governments continue to expand childcare programming while the talent supply remains constrained by federal immigration restrictions.

In response, the model of intervention offers pathways for action. Advocacy for policy revisions—led by city officials, educational institutions, and industry stakeholders—seeks to secure exemptions or policy changes for high-need fields such as ECE. Simultaneously, strategies to boost domestic enrollment include scholarships, targeted recruitment efforts, and financial incentives aimed at encouraging more domestic students to pursue ECE training. Complementary to this, retention and employment support for international graduates can facilitate smoother transitions into permanent residency and employment within the sector. Additionally, support for affected industries, through temporary workforce solutions or employer-led childcare initiatives, can help mitigate immediate labour shortages. Effective intervention also depends on collaboration between levels of government—municipal, provincial, and federal—to ensure coherent and aligned policy responses.

To assess the outcomes of such interventions, the evaluation framework emphasizes empirical monitoring and analysis. Policy change outcomes can be tracked through shifts in immigration regulations, such as expanded work permits or targeted visa exemptions. Enrollment trends, particularly among domestic students in ECE programs, offer indicators of recruitment success. Similarly, retention rates of international

graduates provide insight into the effectiveness of post-graduation support mechanisms. Broader economic indicators, such as labour force participation rates among parents, help capture the wider societal impact of workforce shortages. Finally, policy alignment measures evaluate the extent to which federal and provincial initiatives are coordinated and mutually reinforcing in addressing the childcare workforce crisis.

Based on the data collected from the interview and various secondary sources, the early childhood education sector in London, Ontario is at risk. Concerns from the wider student population combined with the anecdotal experience of one enrolled at Fanshawe paints the picture of a sector that supports neither its workers nor its students. Current RECEs face worries over inadequate pay, lacklustre benefits, and job insecurity. At the same time, students—many of whom are international—face the additional barriers of studying in a new place where post-graduate opportunities are in constant doubt.

In crafting future recommendations from these findings, the following—seen in Exhibit B—must be considered: the inaccessibility of support services in London for new arrivals, the conflicting policy initiatives of different levels of the Canadian federal system, uncompetitive pay and benefits, and the doubtful, cynical perspectives of future ECEs regarding the sector and their future.

Conclusions & Future Recommendations

The recent federal cap on international student visas is expected to have a substantial and long-term impact on London's talent pipeline, particularly in industries that typically rely on international students as both learners and potential professionals. This research indicates that the strategy may undermine the sustainability of critical sectors, including early childhood education (ECE), advanced manufacturing, financial services, and technology, which are essential to London's economic development.

Our research discovered that international students are profoundly ingrained in London's economic and social fabric, contributing not only as students but also as workers, volunteers, and future residents. 20% of the local workforce in ECE is made up of international graduates working in the early childhood education sector.¹²⁸ Interviews with stakeholders, including an international student in Fanshawe's ECE department, indicated critical impediments to student performance and retention, such as cultural adjustment, financial pressure, and a lack of readily available support services.

¹²⁸ Ontario Ministry of Education, as cited in Allison Jones, "Ontario Colleges Warn That Work Permit Changes Will Stunt \$10-a-Day Child-Care Program," *Global News*, October 29, 2024, <https://globalnews.ca/news/10837019/ont-international-eces/>.

Furthermore, students' goals for enrolling in ECE programs vary; some are committed to long-term careers in the area, while others utilize the program as a stepping stone to immigration, with no aspirations to work in childcare after graduation.

In other sectors, such as technology, logistics, and hospitality, the expected 30% decline in international student intake will most certainly result in fewer skilled graduates joining the local workforce.¹²⁹ This raises significant concerns for the technology and startup scene in London, where a considerable proportion of enterprises have been established by individuals from diverse international backgrounds.¹³⁰

To address the negative impacts of the visa cap and maintain a strong talent pipeline in London, City Hall must implement decisive and proactive measures. In particular, the authors recommend the following practical actions:

1. Advocate for Policy Revision: The city should encourage collaboration to address this issue from a unified perspective across federal levels in policy for initiatives experiencing significant workforce shortages, like early childhood education. Utilizing local data is essential to underscore the economic dangers associated with restricting international enrollment, especially in the sectors outlined in our report

2. Enhance Domestic Recruitment: Given the anticipated decline in international students, London must implement aggressive strategies to attract domestic students to ECE programs. This may encompass public awareness initiatives, local scholarships, and outreach efforts via high schools and employment centres. Fanshawe College may serve as a pivotal collaborator in this effort.

3. Support for Affected Sectors: Offer specialized assistance and resources to industries anticipated to have talent deficits due to reduced international enrollment. This may entail the creation of local training grants, collaborations with post-secondary schools, and provisional workforce support programs to mitigate sudden labour market fluctuations.

¹²⁹ Government of Canada, "Who Can Apply: Work in Canada After You Graduate," Immigration, Refugees and Citizenship Canada, last modified February 22, 2025, <https://www.canada.ca/en/immigration-refugees-citizenship/services/study-canada/work/after-graduation/eligibility.html>.

¹³⁰ TechAlliance, *Annual Innovation Report 2023* (London, ON: TechAlliance, 2023), <https://www.techalliance.ca/news/london-named-in-the-top-10-north-american-tech-markets-again/>.

4. Promote Retention of Current International Students: Implement strategies to keep current international students after graduation, such as streamlining pathways to permanent residency and providing job search assistance. Improving retention will help retain the specialized skill sets required in ECE and other critical areas while guaranteeing that the local talent base remains resilient. At the same time, learning from current students' experiences underlines the importance of raising knowledge of available support mechanisms, as many international students encounter considerable financial issues and report feeling isolated or undersupported. Tackling these concerns and enhancing compensation and job satisfaction in the ECE sector would improve student well-being and motivation while also increasing the possibility that graduates will stay in the profession and contribute to the local economy in the long run.

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Exhibits:

Exhibit A:

Wai Yee Chan Interview Questions

- 1) What are some of the biggest challenges international students have faced in the ECE program?
- 2) Do international students face added barriers to getting the same diploma, job placement, or internship? Regarding demographics or challenges, have you noticed any difficulties in student in-class placement positions?
- 3) How have the recent policy changes affected your plans post-graduation?
- 4) What has been the process of obtaining a work permit under the newly implemented policies?
- 5) What attracts international students to the programs in Canada, Ontario, or Fanshawe? (What influences decisions?)
- 6) Do International students face any challenges in the Fanshawe application and enrollment process? Is it made easy for international students to apply?
- 7) What more could be done to support such international students, if anything?
- 8) Has she seen fewer international students in this batch compared to her first year?

Exhibit B:

Key Takeaways to Address from the Analysis

TAKEAWAYS

01

Inaccessibility of support services in the City of London for new arrivals

02

Conflicting policy initiatives from different levels of the Canadian federal system

03

Uncompetitive pay and benefits

04

Concerns and skepticism expressed by students regarding the future of the sector and their career prospects



Chapter 10: Transportation Industry

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Executive Summary

This section evaluates the effects of the new changes in Canadian immigration policies on the transportation industry of London, Ontario, and the anticipations of the subsequent impact. The transport base of London, which is a central regional hub for rail and highway networks, is heavily reliant on the skills gap filled by immigrant workers, given that the industry employs more than 32,000 individuals. However, the city is currently battling with labor shortages caused by the decrease in the number of international students, demographic changes, and the demand for new types of work in the industry.

International students have been an essential part of the transportation sector, covering roles from truck driving and public transit to logistics. Institutions such as Fanshawe College and Western University have generally supported this pipeline with geared training programs that attract a high number of international students. However, with a reported 35% drop in international enrollment at Fanshawe and other institutions across Ontario, the supply of job-ready graduates is shrinking. Hence, this threatens to worsen existing labor shortages, especially in the truck driving sector, where open positions are already noticeable, and many workers are near their retirement age.

Furthermore, repercussions can be seen throughout the sector. Employers face higher recruitment and retention challenges, and public transit agencies, for example, London Transit, are at risk of losing both workers and rider revenues. Students attending post-secondary institutions account for almost half of the trips made by the London Transit Commission (LTC), and their compulsory transit fees represent a considerable part of the funding. In case international enrolment decreases continuously, LTC might be compelled to cut the service or raise ride fares, which would disrupt mobility across the city.

Looking ahead, London's transportation sector must respond with strategic adaptation. This may include strengthening partnerships with local colleges, adjusting service levels to match evolving ridership patterns, enhancing outreach to underutilized talent pools, and diversifying revenue streams. By doing so, London could better mitigate the adverse effects of immigration policy changes and secure a more stable transportation workforce and infrastructure for the future.

The Context

London, Ontario is facing a rising skills gap in several industries due to changes in college or university enrollment trends, changing workforce demands, and demographic shifts. Industries including transportation confront major difficulties in finding qualified personnel as companies look for workers with the necessary skills. This section provides a summary of the talent pipeline's present status in London, emphasizing enrollment patterns, industry-specific gaps, and recommendations from those actively involved in workforce development.

London became an important transportation and industrial center due to its Interlake location during the mid-19th century. Today, it is the hub of extensive rail and highway networks radiating into the surrounding agricultural region, which produces fruit, vegetables, grain, and dairy products. Transportation always plays a measured role in the development of a city. Efficient transport networks like air, railway, and waterways help run businesses smoothly and strengthen the supply and demand chain.¹

According to the London Economic Development Corporation, 32,650 people work in the Trades, Transportation, and Equipment Operations.² The need for drivers in the transport industry is set to increase by 13 percent, which means there will be a need for more than 43,700 truck drivers by 2031³. 32.6 percent of the truck drivers are immigrants—those who initially come as a student here for work opportunities and getting permanent residency. This clearly indicates that a major population of people working in the transportation industry are immigrants.

In addition to that, Western University and Fanshawe College have their driving academies which aid in providing the workforce needed to fill this gap. For instance, more than 100 students complete Fanshawe's program each year, and students get up to 180 hours of training, including classroom time. It goes beyond the Ministry of Transportation's Mandatory Entry-Level Training (MELT) program, which requires a minimum of 103.5 hours of training⁴. The Fanshawe College is home to 43,000 full-time students with more than 10,000 international students. Fanshawe College offers programs such as their School of Transportation, Technology & Apprenticeship, which offers a range of programs designed to prepare students for careers in the transportation sector. During the 2021/2022 academic year, 639 students, including 394 domestic and 245 international students. Fanshawe also offers a one-year post-grad supply chain management certification (Co-op), that is designed to prepare students for careers in transportation coordination and inventory management. This program attracts a lot of international students, ranking 3rd overall in Fanshawe's Top 20 Full Time Post-Secondary Program enrolments by international students². However, Andrew Lupton, a

reporter at CBC News, reported that Fanshawe College saw a 35 percent drop in international student enrolment this fall, the president of the institution indicated⁵. This decrease reduces the number of students entering training programs and ultimately the number of job-ready graduates entering the labour market.

The transportation sector is already under pressure. In Q2 of 2021, there were over 18,000 truck driver vacancies in Ontario. Nearly 72% of employers reported difficulties recruiting drivers as a major challenge³. These shortages are expected to worsen due to an aging workforce and continued demand for freight transportation.

The drop in international enrolment has further magnified these workforce challenges. Truck driving schools across the Peel Region, including Mississauga, Brampton, and Caledon, have reported enrolment declines of 40-60% following the federal cap on student permits⁴. This decline directly impacts the availability of newly trained drivers entering the workforce.

Employers and institutions are exploring alternative solutions, such as strengthening ties with training providers to develop curriculum that is more tailored to employer needs, as well as focusing on recruiting newcomers with existing driving experience from abroad. There is also an emphasis on streamlining licensing and credential recognition for foreign trained drivers. However, such measures may only partially offset the gap caused by the reduction in international student numbers.

Relevance for London

The transportation industry is the backbone of London, Ontario ensuring that people and goods move efficiently through the city. With over 32,650 people working in trades, transportation, and operations, the transportation industry plays a crucial role in London's economy. Recent changes to immigration policies like the federal cap on international student enrolment have imposed a strict limit on the number of students allowed to enter Canada. While this change was aimed at addressing housing shortages and strain on public services, the number of international students enrolling in London's post-secondary institutions has reduced significantly. As a result, the city's transportation industry talent pipeline is at risk because most people wanting to work in the transportation industry are international students. This section explores how this change in immigration policy is affecting London's workforce, businesses, and transport infrastructure.

Workforce Shortages

One of the biggest problems arising from the cap on international students is its impact on labour availability in transportation-related jobs. For example, the trucking industry in Canada is dealing with an ageing workforce with the average age being 48 years old, nearing retirement. Just a few decades ago, immigrants made up 7.7% of truck drivers and by 2016 that figure had jumped to 32.5%, showing how immigration has helped filling these roles⁵. With fewer international students being able to come to Canada, the pipeline that supplies future transportation industry workers is at risk.

London's transportation industry also includes public transit, rideshare services, and logistics. These sub-sectors are also heavily reliant on international students as many work as Uber and Lyft drivers, fill warehouse and logistics roles, and contribute to the demand for public transit. Many international students at Western University and Fanshawe College take on part-time jobs driving for Uber and Lyft or working in warehouse operations. These jobs help students cover their living expenses while also supporting essential services in the city. With fewer international students arriving in Canada, there may be fewer drivers available leading to longer wait times for ride-sharing services and staffing shortages in logistics companies. Their participation in the transportation industry helps the city offer more services which many London residents rely on daily.

As mentioned above, many workers in the transportation sector are approaching retirement and without new talent coming in, businesses will struggle to keep operations running smoothly. At the same time, fewer young people are choosing careers in transportation leading to concerns about long-term labour shortages⁶. Without a sustainable talent pipeline, London's transportation industry may experience a decline in efficiency and service reliability, making it harder for businesses and individuals to access essential transportation services.

Financial and Economic Consequences

Additionally, beyond workforce issues, the drop in international student enrolment is having a direct financial impact on public transit. Students at Western and Fanshawe pay mandatory transit fees, whether they use the service or not, providing steady funding to the London Transit Commission (LTC). However, Fanshawe College has already reported a 35% decrease in international student enrolment which could create significant funding gaps for LTC⁷. If revenue declines then LTC will be forced to cut services, raise fares, or delay infrastructure improvements making it harder for residents to get around the city.

Additionally, businesses in the transportation and logistics industry are already facing problems due to workforce shortages. Companies like Fraser Direct and Canada Cartage depend on a steady flow of workers to keep their operations running. If the labour shortage continues to exist then the companies might have to increase wages to attract workers which will drive up overall costs. The shipping costs might also rise causing consumers higher prices for goods. Higher labour and operating costs could discourage businesses and make London a less competitive hub for transportation and logistics which will slow down investment and economic development.

Conclusion + Recommended Next Steps

Interview Summary with Joanne Galloway (Director of Human Resources, London Transit)

Joanne Galloway confirms that the federal cap on international students is a serious concern for London Transit's talent pipeline. The agency has been aggressively recruiting to fill jobs – especially bus operators and mechanics – and managed to reach its target driver workforce in 2024 through continuous hiring. But with Ontario seeing nearly a 50% drop in new international students, she warns this will shrink the local pool of future transit workers – since London Transit often relies on newcomers for key roles. Galloway fears that even Canada's new immigration pathways for transit operators may not offset the impact of reduced international inflows. To adapt, her team is doubling down on local recruitment and training. London Transit expanded its 310T mechanic apprenticeship program to develop talent internally and is placing extra focus on keeping veteran operators. The agency is boosting outreach via job fairs and community partnerships to tap diverse local talent. Galloway suggests pushing for transit jobs to be prioritized if immigration quotas are revisited.

Interview Summary with Katie Burns (Director of Planning, London Transit)

Katie Burns notes that post-secondary students typically account for about half of all trips on London Transit, so any enrollment decline directly impacts ridership. In 2023, transit usage exceeded expectations thanks in part to robust student enrollment, but now those projections are being dialed back under the cap. Fewer international students will likely translate into fewer riders on campus routes. If Western or Fanshawe cut intake or programs, Burns says transit service will be trimmed accordingly – avoiding empty buses while still meeting core needs. Looking ahead, Burns's team is building flexibility into plans. They will closely watch college and university intake each term and redeploy buses as needed. If student demand softens, capacity can shift to busier routes or new initiatives to attract riders. Burns sees an opportunity to broaden the

customer base: “If we’re carrying fewer students, we can focus on winning riders from other segments of the community.” Her priority is to stay responsive to demographic shifts so that service remains reliable even as the student cap reshapes demand. Overall, both leaders expect the international student cap to have significant ripple effects on London’s transit – from a shrinking hiring pool to lower student ridership – as a policy meant to ease housing creates new local challenges London Transit must take proactive measures to soften these impacts.

Strategic Recommendations:

To manage these challenges within its mandate, London Transit should take targeted actions to stabilize its workforce and ridership base:

1. Enhance Workforce Recruitment and Retention:

Mitigate labor shortages by expanding local hiring initiatives and improving retention incentives. For example, partner with Fanshawe College’s transportation and skilled trades programs to create a pipeline for transit operators and mechanics (through apprenticeships or co-op placements), recruiting graduating students and recent immigrants into transit careers. Offering competitive wages, training opportunities, and flexible schedules will help retain veteran drivers and mechanics and make transit employment attractive to new talent. London Transit can also collaborate with newcomer settlement agencies to tap into other immigrant talent pools, offsetting the reduced influx of international student graduates.

2. Align Service Levels to Evolving Demand:

Ensure service sustainability by adjusting operations to match shifting ridership patterns. Using updated post-secondary enrollment data, calibrate route frequencies and capacity on university/college routes – if Western and Fanshawe have fewer international students living off campus, certain routes or times may see lighter loads and can be scaled down, with resources reallocated to growing ridership areas. At the same time, avoid across-the-board cuts. maintain core service for students and the community by optimizing routes and schedules (e.g., consolidating underutilized trips) rather than eliminating coverage. London Transit should also consider deploying right-sized vehicles or demand-responsive shuttles on routes where student ridership has declined, so that service is provided efficiently without excess capacity. These measures will control costs in response to revenue dips while preserving reliable transit options, keeping the system resilient as ridership fluctuates.

3. Strengthen Campus Partnerships:

Work closely with Western University and Fanshawe College to adapt to enrollment shifts and uphold student ridership. The transit commission should maintain regular communication with campus administrations and student unions about projected enrollment changes, ensuring the universal transit pass agreements remain in place and financially viable even with fewer total students. If international student numbers drop, London Transit can negotiate creative adjustments (for instance, slight per-student fee increases or temporary subsidies from the institutions) to keep the transit pass program whole without burdening remaining students. Meanwhile, joint marketing and outreach is key: coordinate with the schools to promote transit use among all students (domestic and international) – through orientation events, “try transit” initiatives, and service improvements tailored to student needs (like express shuttles or extended hours during exams). By reinforcing transit’s value and convenience, London Transit and its campus partners can maintain a strong mode share on campus despite a smaller international cohort, protecting ridership revenue and avoiding a negative feedback loop of service cuts and further ridership loss.

4. Diversify Ridership and Revenue Streams:

In light of the uncertainty around student ridership, London Transit should broaden its focus to attract other rider groups and stabilize income. This includes marketing campaigns targeting young professionals, new residents, and marginalized communities in London who may not currently use transit. Emphasizing the affordability of transit (versus driving and parking costs) and improving service reliability will help draw in these riders. To add on, expanding employer-based transit pass programs is another tactic. London Transit can partner with major employers in the city to offer discounted transit passes to employees, tapping into a new steady ridership base. Additionally, seeking modest ancillary revenue growth – for example, through increased advertising on buses and at stops, or modest fare adjustments in non-student categories – can help offset the dip in student fare revenue. By diversifying its ridership mix and revenue sources, London Transit will be less dependent on post-secondary demand cycles and better able to fund service continuity.

In conclusion, London Transit can navigate the fallout of the federal international student cap by proactively managing what is within its control. While it cannot alter federal or provincial policies, it can fortify its own workforce development, adapt services to the new ridership reality, and strengthen local partnerships. By implementing the strategies above – bolstering hiring pipelines, right-sizing service, collaborating with campuses, and broadening its customer base – London Transit will improve its resilience. These measures will help ensure that transit service in London remains

reliable and financially viable, even as post-secondary enrollment patterns evolve, thereby sustaining the mobility needs of the community for the long term.

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Chapter 11: Organized Sports

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Executive Summary

The latest changes to Canadian immigration policy, particularly the limitations on international student intake, are expected to impact the organized sports sector in London, Ontario, significantly. Historically, immigration has played a key role in diversifying and enriching the Canadian sports system, contributing to player participation and workforce engagement in coaching, officiating, and program leadership. With the advancements of the Immigration Levels Plan 2025-2027 and the International Student Cap, the number of international students entering Canada is projected to decline considerably, reducing the talent pool and participation levels in organized sports.

Through interviews with individuals involved in various sports disciplines—Ethan Tran (competitive hockey and football player), Tanush Puri (Vice President of the Huron Cricket Club), and a local Bharatnatyam dance instructor—there is a consensus that the policy changes will negatively impact sports engagement. While some sectors, like hockey, may experience only marginal declines in international student participation, others, such as cricket, face more severe repercussions due to their reliance on international students and immigrant communities for growth and sustainability. The reduction in immigration is expected to have many adverse effects on organized sports, including a declining player pool, weaker competition, financial strain on sports organizations, and diminished cultural influence.

To mitigate these effects, targeted interventions such as youth engagement programs, inclusive community sports initiatives, corporate and senior sports leagues, and awareness campaigns are highly recommended. These measures can help sustain

participation and ensure the long-term viability of London, Ontario's sports culture despite the changes in Canadian immigration trends.

The ongoing evaluation of intervention strategies is crucial to maintaining the inclusivity and vitality of organized sports in London. Metrics such as enrollment trends, diversity representation, economic indicators, and community engagement levels should be monitored to assess the success of these initiatives. Ultimately, while the impact of Canadian immigration policy changes presents challenges, proactive measures can help preserve London, Ontario's rich and diverse sporting landscape.

Context of the Problem

The recent changes to immigration policy, specifically regarding the flow of international students, will substantially impact the organized sports sector in London, Ontario. These policy changes are significant, and the changes to immigration levels are anticipated to hurt London's sports industry in the future.

As Canada's national winter sport, it is clear that hockey is one of the most prominent activities in our society today. During the 2023/2024 hockey season in Canada, the regional league with the highest registered players was the Ontario Hockey Federation, with over 204,000 players in total.¹³¹ Hockey has established itself in Canadian culture. As Canada is a top choice for immigrants looking for a new place to work, study and build their lives with their families¹³², international newcomers tend to assimilate into Canadian sporting programs. Canada's sport system allows individuals from all aspects of Canadian society to participate in organized sports at all levels and in all forms of participation.¹³³ For instance, many athletes representing Canada globally were born outside of the country.

Additionally, immigration in Canada has led to the diversification of sports, such as increased involvement and participation in cricket.¹³⁴ Cricket has seen positive growth within Canada, with a growing fanbase, increased media coverage, and more international success.¹³⁵ Concerning the career aspects of sports, more than 3,400

¹³¹ C Gough, Registered hockey player numbers by region Canada 2023 | statista, accessed March 31, 2025, <https://www.statista.com/statistics/1275870/registered-hockey-players-by-region-canada/>.

¹³² Refugees and Citizenship Canada Immigration, "Transforming Our Immigration System to Build a Stronger Canada," Canada.ca, October 31, 2023, <https://www.canada.ca/en/immigration-refugees-citizenship/news/2023/10/transforming-our-immigration-system-to-build-a-stronger-canada.html>.

¹³³ Ibid.

¹³⁴ Greg McIsaac, "Cricket in Canada Celebrates a Historic Year of International Success, Record Partnerships, and Growing Fanbase," Global Press Release & Newswire Distribution Services, December 12, 2024, <https://www.businesswire.com/news/home/20241212115040/en/Cricket-in-Canada-Celebrates-a-Historic-Year-of-International-Success-Record-Partnerships-and-Growing-Fanbase>.

¹³⁵ Ibid.

immigrants work as athletes, coaches, officials, and referees nationwide. Moreover, Immigrants make up 24% of all people working in Canada as sports coaches.¹³⁶ Furthermore, 13,000 immigrants earn their degrees as program leaders and instructors in recreation, sport and fitness t, throughout Canada.¹³⁷

These statistics showcase the correlation between immigration and organized sport, which are positive aspects of Canadian society. The improvement of international participation in Canadian sport culture can be attributed to the recent rise in immigrants and international students. However, the latest modifications to Canadian immigration policy, particularly regarding the limitations surrounding the influx of international students, are projected to diminish the organized sports sector in London, Ontario, significantly. The Immigration Levels Plan 2025-2027, coupled with the International Student Cap, mandates an intake limit on international scholars and will progress towards a pause of admissions at 305,900 from 2025 until 2027, a decrease of 10% from 2024 to 2025.¹³⁸ In addition to reducing the number of international students immigrating to Canada, the Federal government also announced a further reduction on the cap on international study permits for 2025 based on a 10% reduction from the 2024 target of 485,000 new study permits issued.¹³⁹ These policy adjustments are substantial, and the shifts in immigration levels are expected to impact London's sports industry moving forward negatively.

Impacted Individuals and Relevance for London

During our study, our team interviewed two members of the Huron University College student body and one member of the London community. Former football and competitive hockey player Ethan Tran, Vice President of the Huron Cricket Club Tanush Puri, and a local Bharatnatyam dance instructor were kind enough to participate in our interview process. Each interview consisted of five questions asked to each individual and the recording of their responses.

Interview Questions

1. Have you noticed a change in participation in your associated sport in recent years as the number of international students has increased?
2. Have you noticed a change in the demographic in your associated sport in recent

¹³⁶ Refugees and Citizenship Canada Immigration, "Government of Canada," Canada.ca, October 23, 2024, <https://www.canada.ca/en/immigration-refugees-citizenship/campaigns/immigration-matters/growing-canada-future/sports.html>.

¹³⁷ Ibid.

¹³⁸ Refugees and Citizenship Canada Immigration, "Canada's Immigration Levels," Canada.ca, November 4, 2024, <https://www.canada.ca/en/immigration-refugees-citizenship/corporate/mandate/corporate-initiatives/levels.html>.

¹³⁹ Ibid.

years?

3. What is the estimated percentage of international participation vs domestic Canadian participation in your associated sport based on your experiences?
4. With Canadian immigration policies changing, do you expect interest levels in your associated sport to increase, decrease, or remain the same?
5. How long have you been involved in your sports sector in London?

Interview #1: Ethan Tran - Competitive Athlete

Our first interview occurred at the Spoke, a Western University's UCC restaurant. Ethan Tran is a London local and has lived in the city his entire life. He was a part of many sports teams throughout his childhood, including but not limited to the London Junior Knights hockey club and the London Junior Mustangs football team. As Ethan has been playing sports in London since the early age of four, he has seen the growth of many sports programs in and around the city. More specifically, Tran stated that football has seen significant growth in player enrollment and the number of programs available.

Additionally, he has seen increased participation from international students in Canada's national winter sport, hockey. Ethan estimated the percentage of international student involvement in hockey to be around 5% of total players in the city. He based this projection on his observations during competitive tryout periods over the years. Tran stated that there has been a noticeable progression of interest from the international student population in London, and he expects to see an increase in global student participation due to intergenerational relationships and passing the knowledge of sports onward to their children. However, he believes that interest levels in hockey among international students are the same relative to the size of the international population in Canada, and he assumes the number of international students that participate in hockey will decrease due to the regulatory changes regarding immigration.

Interview #2: Tanush Puri - VP of the Huron Cricket Club

Our team arranged to meet with Tanush Puri in Huron's Old Sac standard room to conduct our second interview. Passionate about the sport of cricket, Tanush pursued the role of Vice President at the Huron Cricket Club. Puri explained that although cricket originated in England, it is not as popular in Europe as in the South; Tanush has noticed a significant increase in interest in cricket in London. He said that some domestic students show up to learn about the sport, but the club's demographic predominantly comprises students from the southern Asia region. Upon creating the Huron Cricket Club fifteen months ago, only thirty students attended the club's first event. Since then,

the club has seen a substantial increase in enrollment. In October 2025, forty-five members actively participated in the club's organized cricket matches. Tanush has seen the interest in cricket grow amongst domestic students, stating that they are excited for the next cricket match and love learning about the game. Puri conveyed that initially, very few Canadians were familiar with cricket.

Now, Puri estimates that 10-15% of the club are domestic students, with the rest being international students from southern Asia and Middle Eastern countries. However, Tanush predicts that the high levels of international student involvement in the Huron Cricket Club will begin to diminish. He stated that the quantity of international students has already been decreasing since the changes in the Canadian immigration policy. Tanush explained that, in India, it is harder for international scholars to obtain a job after graduation due to the GIC Proof of \$20,000 policy change. Tanush believes that this policy modification will hinder international participation moving forward. Moreover, Puri is worried about how the policy changes will affect the club's future operations as it needs to meet the minimum requirement of thirty students to remain a club at the school. With the 2025 international enrollment projections, Tanush fears that the Huron Cricket Club might be unable to replenish its graduating members, thus jeopardizing the club's existence.

Interview #3: Local Bharatnatyam Dance Instructor

Our last interview with a local Bharatnatyam dance instructor, who prefers to remain anonymous, provided great insight into the artistic side of the sport and offered her perspective on the impacts of immigration policy changes on her designated sporting sector. She has been involved in teaching the dances of India for over 30 years. The instructor has noticed a significant change in participation in her associated sport in recent years. As the number of international students has increased, so has participation in Bharatanatyam dancing. Further, the instructor indicated a variance in the demographic importing sector. The industry of demographic Bharatanatyam dance has seen some interest from non-Indian Canadians, mainly observed by the instructor through the participants in her program. She estimates the percentage of international and domestic Canadian participation in Bharatanatyam dance to be roughly 5% of international students and immigrants. At the same time, the rest are Canadian-born (majority Indian Canadian). Only a fraction of the participants in Bharatanatyam dance are of another ethnicity. With the changes in Canadian immigration policy, the anonymous instructor believes that interest levels will remain roughly the same or marginally decrease after the changes are implemented.

Framing, Causation, Intervention, Evaluation and Recommendations

Framing the Argument

Reduced immigration is anticipated to impact organized sports in London, Ontario negatively. An effective way to frame the argument for organized sports is to promote investing in the community. Sports are not just about playing games. The culture of organized sports is about building a stronger, healthier and more connected community. When everyone has access to sports, neighbourhoods thrive, crime goes down, and people of all ages come together. With a reduction in immigration, it is imperative to maintain a cohesive and inclusive London community. By framing the issue this way, it is clear that reduced immigration has impactful consequences for organized sports, but targeted interventions can help sustain participation, diversity, and competitiveness.

Model of Causation

The causation model for this potential problem includes many aspects that impact organized sports. Reducing Canadian immigration can lead to a declining player pool, a smaller talent pipeline, and fewer community and professional sports participants. Moreover, the modifications to Canadian immigration policy will cause a loss of cultural influence. Many immigrant communities bring strong sports traditions (e.g., soccer, cricket, martial arts) that enrich local sports culture.

Additionally, lower immigration rates will cause weaker competition and athletic development. Many elite athletes and young talents in various sports come from immigrant backgrounds. A smaller immigrant population may reduce competitiveness in both local and national sports leagues. Further, sports teams rely on diverse fan bases for revenue and engagement. A reduction in immigrant communities may lead to lower attendance and enthusiasm. This will negatively impact the economy as immigrants are strong contributors to local economies, spending on sports programs, coaching, and facilities. Therefore, reduced immigration can weaken financial support for sports organizations. Furthermore, individuals from immigrant communities often play key roles in youth sports programs as volunteers, coaches, and supporters.

Model of Intervention

A variety of intervention instruments can be effective in mitigating the effects of Canadian immigration policy in the London community. With reduced immigration into Canada, increasing participation in sports requires a focus on engaging the existing population. This can be done by making sports more accessible and fostering

community involvement. A practical method to improve enrollment in sports is to develop youth engagement programs. This strategy includes enhancing school extracurricular sports programs, offering financial assistance or scholarships to make sports affordable, and encouraging participation in multiple sports to ensure long-term interest. Establishing a more substantial sporting presence in the London community is essential in improving participation. This can be implemented in many ways, such as promoting recreational, non-competitive leagues to engage individuals who may not pursue elite sports—organizing community sports days, parent-child tournaments, and open-house sessions to encourage family participation. Further, it is important to acknowledge Canada's working demographic and aging population to arrange their participation in organized sports. This can be done through workplace and corporate leagues that encourage businesses to support employee participation in sports. London can also offer evening and weekend leagues for working adults and develop leagues for older citizens to stay active and engaged in their community.

Furthermore, the city of London must raise awareness of reduced enrollment in organized sports. Social media and digital platforms can effectively highlight the benefits of playing sports to those involved in the London community. By focusing on these strategies, London can ensure the sustainability of sports involvement despite the changes in immigration policy that result in lower immigration rates.

Model of Evaluation

Assessing the implemented interventions is imperative in evaluating their success. Measuring the effectiveness of interventions is crucial in addressing the impact of declining immigration on sports participation in London. Several key metrics can help track progress and ensure meaningful outcomes. One approach is recording the number of athletes, particularly in sports traditionally enriched by immigrant communities, to monitor shifts in international involvement. Additionally, assessing representation across youth leagues, coaching staff, and professional teams provides insight into diversity trends. Tracking changes in team success, skill levels, and success on the international stage will help evaluate overall sports performance. Financial indicators, such as the economic health of sports organizations, ticket sales, and sponsorship deals tied to diverse audiences, also serve as valuable measures. Community engagement surveys can further gauge fan interest, youth participation, and public sentiment. Lastly, analyzing volunteer and coaching trends can determine whether sports programs can sustain adequate support despite demographic shifts. By leveraging these evaluation methods, London can make data-driven decisions to uphold the vitality and inclusivity of its organized sport system.

Impact of Immigration on Organized Sports

Overall, it is evident that the recent revisions to Canadian immigration policy surrounding the reduction in international students and immigrants will substantially impact the organized sports sector in London, Ontario. These policy modifications are substantial, and the changes to immigration levels are expected to harm London's sporting sector in the next few years. As seen through the lenses of our interviewees, it is clear that the London community is apprehensive of the impacts of the changes in Canadian immigration policy and that there is an established trend within the interviews. Ethan Tran, Tanush Puri, and a local Bharatnatyam dance instructor anticipate that their respective sporting sectors will experience a decrease in enrollment and participation in the future. For some, the decline in interest is minimal. However, for others, the change in enlistment is detrimental to their sporting culture.

This challenge can be framed as an opportunity to strengthen our community. Sports play a crucial role in fostering healthier and connected neighbourhoods by bringing people together. Although fewer immigrants could lead to reduced participation, diversity, and competition in sports, targeted efforts can help preserve these aspects of the city. The key consequences of reduced immigration include a smaller player pool, a loss of cultural diversity in sports, weaker competition, and less fan engagement, affecting financial support for sports programs. Immigrant communities also contribute significantly to youth sports as volunteers and coaches. To address these challenges, interventions should focus on increasing participation among the local population. This can be done by enhancing youth sports programs, offering financial assistance, creating non-competitive leagues, and organizing community sports events.

Promoting the workplace and senior leagues can also keep many people involved in sports. In order to measure success, it is important to track various metrics such as participation rates, diversity in leagues, the financial health of sports organizations, community engagement, and volunteer involvement. These measures will ensure that organized sports in London, Ontario, will remain inclusive and sustainable despite changes in immigration. Regardless of whether the impacts on each sport are considerable or negligible, it is indisputable that the declining levels of Canadian immigration will have an unfavourable influence on the future of organized sport in London, Ontario, for years to come.

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Executive Summary

London, Ontario is rapidly emerging as a dynamic center for technology and sustainability, with sectors like fintech, artificial intelligence, cleantech, and advanced manufacturing driving substantial economic growth.¹⁴⁰ The city's tech workforce has surged by 88.5% over the past five years, marking it as one of North America's fastest-growing emerging tech hubs. (Exhibit 1)¹⁴¹ However, the sector's continued success hinges on its ability to retain talent, especially international students and graduates. This chapter highlights the recent changes to immigration policy and challenges in post-graduate pathways that have significantly impacted London's tech sector.

Despite the strong talent pipeline from institutions like Western University and Fanshawe College, London continues to lose high-potential graduates to larger cities and global competitors due to restrictive work permit rules, limited permanent residency options, and a lack of coordinated local retention strategies. By analyzing workforce data, employer interviews, and immigration trends, this chapter demonstrates that without proactive policy reform and local investment in retention, London risks undermining its innovation momentum.

Strategic recommendations focus on enhancing immigration pathways for international graduates, improving access to venture capital, and fostering collaborative efforts between local government, post-secondary institutions, and industry leaders to secure London's future as a competitive innovation hub.¹⁴²

Economic Impact & Growth of the Technology Sector

London's tech sector has grown significantly in recent years, transforming the city into one of Canada's fastest-growing mid-sized innovation hubs. The sector's workforce has expanded by 88.5% over the past five years, surpassing national trends and ranking London as North America's fourth fastest-growing emerging tech hub.¹⁴³ Currently, over 16,000 professionals work in the sector across more than 300 companies, contributing billions to the local economy.¹⁴⁴

¹⁴⁰ Ontario, TechAlliance of Southwestern, and TechAlliance. "From Medicine to Gaming, Here's Why London Is Attracting Tech Talent From Across the Continent." TechAlliance of Southwestern Ontario, September 20, 2024. <https://www.techalliance.ca/news/from-medicine-to-gaming-heres-why-london-is-attracting-tech-talent-from-across-the-continent/>.

¹⁴¹ CBRE Canada. "Canada Leads Tech Talent Growth, Toronto Makes a Comeback," n.d. <https://www.cbre.ca/insights/articles/canada-leads-tech-talent-growth-toronto-makes-a-comeback>.

¹⁴² Windley, Katie. "Toronto-Waterloo Corridor Stands Firm in Startup Ecosystem Rankings." Waterloo EDC, June 15, 2023. <https://www.waterlooeedc.ca/blog/toronto-waterloo-startup-genome-2023>.

¹⁴³ Windley, "Toronto-Waterloo Corridor Stands Firm in Startup Ecosystem Rankings."

¹⁴⁴ Fisher, Shireen. "Emerging Tech Cities in Canada." mdccanada.ca, July 26, 2023. <https://mdccanada.ca/news/immigration/emerging-tech-cities-in-canada-?>

Several industries are driving this expansion, including financial technology (fintech), artificial intelligence (AI), cybersecurity, game development, clean energy, and sustainable manufacturing. Major companies such as Info-Tech Research Group, Digital Extremes, Voices.com, and Paystone have expanded operations in London, with Paystone securing \$69 million in investment to scale its fintech solutions.¹⁴⁵ Academic institutions like Western University and Fanshawe College support this ecosystem by producing graduates in software engineering, AI, cybersecurity, and clean technology. As mentioned in the Advanced Manufacturing chapter, this sector is a key part of London's economy, employing over 34,000 people and representing 12% of the region's total employment. With growing automation and a shift toward sustainability, advanced manufacturing is becoming increasingly interconnected with the broader tech and innovation sectors.¹⁴⁶

However, recent federal caps on international student visas threaten the availability of skilled graduates across these interconnected industries. International students contribute significantly to specialized programs—such as those in AI, engineering, and advanced manufacturing—that supply local firms with qualified talent. As mentioned across numerous chapters in the book, London's talent pipeline suggests this cap could limit productivity, drive up hiring costs, and challenge future succession planning across sectors. To ensure long-term growth and innovation, stronger partnerships between industry and post-secondary institutions are essential to align curricula with emerging sector needs while also creating co-op placements, apprenticeships, and research opportunities that retain talent locally.

London's Competitive Position in Canada

London's position among Canada's mid-sized tech hubs has become increasingly competitive. Kitchener-Waterloo still maintains a larger tech workforce, boasting over 24,000 professionals while continuing to attract firms such as Google and Shopify.¹⁴⁷ However, through robust venture capital flows and strong corporate partnerships, London's recent growth remains more dynamic. Between 2017 and 2022, London's tech sector expanded by 79%, significantly outpacing Waterloo's 52% growth over the same

¹⁴⁵Hamilton, Alex. "Paystone raises CAD 69m with support from Canada business fund," March 28, 2025. <https://www.fintechfutures.com/paytech/paystone-raises-cad-69m-with-support-from-canada-business-fund>.

¹⁴⁶Lightcast, "City of London - Manufacturing Sector Profile Highlights - 2024," 2024, https://london.ca/sites/default/files/2025-03/Sector%20Profile%20Highlights%20-%20Manufacturing%20%282025%29_0.pdf?

¹⁴⁷Akufen. "Google Announces Big Expansion of Its Canadian Operations." Waterloo EDC, June 28, 2023. <https://www.waterlooeedc.ca/blog/google-announces-expansion-canadian-operations?>; Galang, Jessica, and Jessica Galang. "Shopify Adding 300 to 500 New Jobs at Waterloo Office | BetaKit." BetaKit, October 19, 2017. <https://betakit.com/shopify-adding-300-to-500-new-jobs-at-waterloo-office/?>; CityNews Kitchener, "Waterloo Region Has One of the Most Concentrated Tech Workforces in North America: Report," July 15, 2022, <https://kitchener.citynews.ca/2022/07/15/waterloo-region-has-one-of-the-most-concentrated-tech-workforces-in-north-america-report-5586317/>

period. Halifax and Kitchener-Waterloo also show strong growth, but London's edge lies in fintech and sustainability.¹⁴⁸ One example of this is Trojan Technologies, a London-based firm using AI-powered water treatment systems to monitor and optimize filtration in real time, improving both environmental impact and operational efficiency. These kinds of advancements in AI-driven environmental innovation and clean energy technologies position London uniquely in the national landscape.¹⁴⁹ In contrast, Winnipeg's tech sector, with 15,400 professionals, has grown at a slower rate of 22.6% and continues to lag behind in attracting venture capital, further emphasizing London's upward momentum.¹⁵⁰

Challenges to Sustained Growth

London's tech sector has experienced rapid growth, but attracting and retaining skilled professionals remains a major challenge. Despite its expanding innovation ecosystem and strong academic pipeline, London struggles with the same issue as Saint-Catherines, ON—"brain drain".¹⁵¹ This is where highly skilled workers, particularly in AI, fintech, cybersecurity, and clean energy, leave for larger markets such as Toronto, Vancouver, or international tech hubs.¹⁵² This section examines the key challenges affecting talent retention, including salary competition, remote work opportunities, venture capital limitations, and infrastructure constraints.

Challenge #1: Workforce Gaps and Brain Drain

As London's tech sectors grow, demand for specialized talent—particularly in software engineering, data science, cybersecurity, and renewable energy—continues to outpace supply. Employers report difficulty recruiting mid-to-senior-level AI engineers, fintech developers, and cleantech specialists, who often receive more competitive offers from larger markets.¹⁵³

London also faces a persistent "brain drain," as many highly educated graduates leave within a few years of entering the workforce. A key factor is the wage gap: although the cost of living is lower in London, salaries in its tech sector lag behind those in cities like

¹⁴⁸CBRE Canada. "Canadian Tech Sector Shifts from Office-Market Juggernaut to Sleeping Giant," n.d. <https://www.cbre.ca/press-releases/scoring-tech-talent-ranking-of-north-americas-top-tech-job-markets>

¹⁴⁹"About Us | Trojan Technologies," n.d., <https://www.trojantechnologies.com/en/about?>

¹⁵⁰Lizard, Visual. "Winnipeg's Workforce in Tech Sector Has Grown 22.6 per Cent Over Past Five Years | News | Economic Development Winnipeg," n.d. <https://www.economicdevelopmentwinnipeg.com/media/news/read,article/1431/winnipeg-s-workforce-in-tech-sector-has-grown-22-6-per-cent-over-past-five-years#:~:text=But%20Winnipeg%20held%20its%20own,in%20the%20past%20five%20years.>

¹⁵¹The Brock News. "Brain Drain: Study shows many science and tech grads heading to U.S. for work." The Brock News, a News Source for Brock University, n.d. <https://brocku.ca/brock-news/2018/05/brain-drain-study-shows-many-science-and-tech-grads-heading-to-u-s-for-work/>.

¹⁵²Nucamp. "Most in Demand Tech Job in Canada in 2025," n.d. <https://www.nucamp.co/blog/coding-bootcamp-canada-can-most-in-demand-tech-job-in-canada-in-2025?>

¹⁵³Ibid

Toronto or Vancouver.¹⁵⁴ For example, the median salary for a software engineer in London is \$100,138, while in Vancouver it is \$163,033. (Exhibit 2)¹⁵⁵ The rise of remote work further exacerbates this trend, enabling professionals to access higher-paying roles without relocating.

The absence of major corporate headquarters limits opportunities for career advancement. Unlike hubs such as Kitchener-Waterloo, which attract multinationals like Google, London has fewer large-scale employers offering long-term mobility and development.¹⁵⁶ As a result, skilled workers are drawn to more established ecosystems.

Despite a strong academic pipeline, these combined factors contribute to a loss of critical human capital—undermining London’s efforts to build a sustainable, innovation-driven economy.

Challenge #2: Limited Awareness of Local Opportunities

Many recent graduates and job seekers lack awareness of career opportunities within London’s tech industry. Unlike larger cities with well-established industry networks, London’s branding as a tech hub is still developing. Employers and academic counselors note that many graduates assume they must relocate to Toronto or Vancouver for career growth, even when comparable roles exist in London.¹⁵⁷

Challenge #3: Housing Affordability and Urban Infrastructure

Historically, London’s relatively low cost of living was a major draw for young professionals. However, this advantage has diminished due to rapidly increasing housing and rental costs. Over the past five years, the average home price rose by approximately 39%, from \$431,000 in February 2020 to over \$598,500 in February 2025.¹⁵⁸ (Exhibit 3)¹⁵⁹ Rental prices have also surged: as of December 2024, the average one-bedroom rent was around \$1,555–\$1,566, depending on utilities. Just two months later, nesto.ca reported averages of \$1,770 for a one-bedroom and \$2,152 for a

¹⁵⁴London Economic Development Corporation. “2025- 2026 Local Labour Market Plan,” n.d. <https://www.ledc.com/news/2025-2026-local-labour-market-plan-0?>

¹⁵⁵ “Software Engineer Salary in London, Canada,” Levels.fyi, n.d., <https://www.levels.fyi/t/software-engineer/locations/london-can.>; “Software Engineer Salary in Vancouver, Canada,” Levels.fyi, n.d., <https://www.levels.fyi/t/software-engineer/locations/greater-vancouver?city=1320>.

¹⁵⁶ Akufen, “Google Announces Big Expansion of Its Canadian Operations.”

¹⁵⁷ Erie C., interview by Daivid M., April 1, 2025; “Should You Stay or Should You Go?,” n.d. <https://www.theinterrobang.ca/article?aID=8958&>.

¹⁵⁸Wow Leads Inc. “London Housing Market Report: Mar. 10th, 2025 Update | Interactive Map - WOVA.ca,” n.d. <https://wowa.ca/london-housing-market?>

¹⁵⁹“Metro London Ontario Home Price Trends and Forecast to 2027 — Mortgage Sandbox,” Mortgage Sandbox, n.d., <https://www.mortgagesandbox.com/london-real-estate-forecast>.

two-bedroom.¹⁶⁰ This steep upward trend in living costs poses growing affordability challenges, making it harder for young professionals to justify settling in the city—eroding one of London’s former competitive strengths.

In addition to rising living expenses, limited access to efficient public transit in London, Ontario, poses a significant barrier to workforce mobility, particularly for international workers and young professionals who may not own personal vehicles. Unlike Toronto’s multi-modal system, which includes subways, streetcars, and frequent bus service; London relies solely on a bus-based network with limited routes and low frequency—especially during evenings and weekends. The absence of a rapid transit system and the city’s sprawling geography further exacerbate the issue, making it difficult for residents to commute to job sites in industrial or suburban areas such as Innovation Park or the city’s southwest end. These transit gaps restrict employment opportunities and can lead to job mismatches or out-migration as individuals relocate to better-connected urban centers. Furthermore, London’s delayed implementation of a Bus Rapid Transit (BRT) system, which only began in 2021, highlights a history of systemic underinvestment in public transportation infrastructure.¹⁶¹ This has limited the city’s capacity to effectively support its expanding and diverse workforce.

Furthermore, the condition of London’s urban core has affected its appeal as a place to live and work. A combination of downtown commercial vacancies and ongoing safety concerns has diminished the attractiveness of the city’s core, creating an environment that may discourage professionals from settling in or investing long-term in the area. For instance, in April 2024, the City of London Police reported 326 incidents involving burglary from motor vehicles, commercial robberies, residential break-ins, theft, and robberies targeting individuals and businesses, raising significant public concerns about safety.¹⁶² Local businesses and residents have voiced frustrations over inadequate mental health and addiction support services, as well as insufficient police presence during key hours.¹⁶³ Institutions like the Canadian Mental Health Association Thames Valley and the London Police Service have taken proactive steps to address this challenge. They launched programs such as the Crisis Call Diversion Program and

¹⁶⁰Computing Services for the Division of Housing and Ancillary Services at Western University. “Average Rental Prices - Off-Campus Housing Services - Off-Campus Housing, Advisor, Mediation, Services at Western University, London Ontario Canada.” Western University, Division of Housing Ancillary Services. All Rights Reserved., n.d. https://offcampus.uwo.ca/average_rentalprices.cfm?

¹⁶¹Get Involved London. “Downtown Loop (Rapid Transit),” n.d. <https://getinvolved.london.ca/downtownloop>.

¹⁶²Karchut, Stephen. “April 2024 London Crime Statistics | Alarmtech.” Alarmtech, May 8, 2024. <https://alarmtech.ca/2024/05/08/april-crime-map/>.

¹⁶³ Erie C., interview by Daivid M., April 2, 2025

COAST to improve mental health support and reduce pressure on emergency services.¹⁶⁴

Immigration & International Students Impact on Technology

International talent plays a critical role in London's technology sector, filling workforce gaps in AI, cybersecurity, fintech, and clean energy. However, recent federal and provincial policy changes have created new barriers for international students and skilled workers seeking employment in Canada, posing a significant risk to London's ability to retain talent. This section examines the impact of federal visa caps, permanent residency (PR) limitations, and the Ontario Immigrant Nominee Program (OINP) on London's tech workforce.¹⁶⁵

International talent remains a cornerstone of London's growing tech workforce, supported by the steady influx of international students at Western University and Fanshawe College. Many of these students pursue degrees in high-demand fields such as STEM, engineering, and sustainability, making them vital contributors to the region's innovation ecosystem. Historically, Canada's immigration framework—particularly the Post-Graduation Work Permit (PGWP) and the Express Entry system—offered clear and reliable pathways for these graduates to transition into the workforce and obtain permanent residency.¹⁶⁶ However, recent federal policy changes have introduced significant uncertainty. The 2024 cap on international student permits, implemented to address housing and resource concerns, is expected to reduce the number of new students and, as a result, the availability of skilled graduates entering London's labour market.

Moreover, new restrictions on Ontario's work permit eligibility provides additional challenges that directly impact locals in London. Updates to the PGWP program now limit automatic eligibility to graduates of select high-demand fields, which may exclude students in emerging areas of technology. At the same time, stricter Express Entry

¹⁶⁴London Economic Development Corporation. "Crisis Call Diversion Program," n.d. <https://www.ledc.com/news/crisis-call-diversion-program?>

¹⁶⁵ontario.ca. "OINP Employer Job Offer: International Student stream," n.d. <https://www.ontario.ca/page/oinp-employer-job-offer-international-student-stream>."; CAN US IMMIGRATION CONSULTANCY. "OINP Programs Latest Updates and Changes You Should Know." CANUS Immigration, March 27, 2025. <https://canusimmigration.ca/2025/03/27/oinp-programs-latest-updates-and-changes/?>; Gillies, Rob. "Canada Will Reduce Immigration Targets. Trudeau Acknowledges His Policy Failed | AP News." AP News, October 24, 2024. <https://apnews.com/article/canada-immigration-reduction-trudeau-dabd4a6248929285f90a5e95aeb06763>.

¹⁶⁶Sidhu, S. Sonia. "What You Need to Know About the New Post-Graduation Work Permit Requirements." Green and Spiegel, October 10, 2024. <https://www.gands.com/blog/2024/10/10/what-you-need-to-know-about-the-new-post-graduation-work-permit-requirements/>

criteria, particularly around work experience thresholds and shifting eligibility metrics, have made it more difficult for international graduates to secure permanent residency.

Likewise, the OINP was designed to attract and fast-track skilled immigrants into the provincial workforce. While it remains a critical policy tool, the program's current structure poses regional limitations. Toronto continues to dominate OINP nominations, limiting the number of slots available for international graduates based in London. Additionally, some roles within the tech sector are not classified under OINP priority streams, making it more difficult for local employers to sponsor qualified international candidates. Finally, ongoing delays in the OINP approval process have led many skilled professionals to pursue opportunities in other provinces with faster and more accessible permanent residency pathways.¹⁶⁷ These combined challenges weaken London's capacity to maintain a robust, internationally diverse workforce in its tech sector.

Interviews with Experts

To gain further insight into the challenges international students face in London's tech sector, an interview was conducted with Erie Conners, Academic Advisor for International Students at Huron University College. Her perspective reveals critical barriers that international students face when transitioning into the local workforce and reinforces several of the chapter's key findings around retention, perception, and institutional capacity.¹⁶⁸

Additionally, Morgan McKay, Information Technology Manager at Paystone, was interviewed to provide an industry-side perspective on hiring, retention, and immigration policy impacts from within one of London's leading fintech companies.

Interview #1: Erie Conners, Academic Advisor for International Students – Huron University College

Conners emphasized that Post-Graduation Work Permit (PGWP) restrictions, such as eligibility rules related to study gaps or part-time enrollment, can disqualify students unexpectedly. Additionally, many international students lack Canadian work experience or professional references, making the transition into the local workforce more difficult—even in fields where there is high demand. “Even if they're strong students, some just don't qualify for the PGWP. And many struggle with resumes, references, or even knowing how to market themselves to local employers.” These insights align with the chapter's analysis of how immigration policy gaps and procedural obstacles are driving

¹⁶⁷ OINP Employer Job Offer: International Student Stream.”; CAN US IMMIGRATION CONSULTANCY, “OINP Programs Latest Updates and Changes You Should Know.”

¹⁶⁸ Erie C., interview by Daivid M., April 1, 2025

away international graduates who could otherwise fill critical roles in AI, cleantech, and fintech.

Huron offers guaranteed internships for students in programs such as Business Intelligence, a degree directly aligned with data analytics and tech-sector employment. These internships serve as critical entry points into London's growing tech economy, where demand for roles in AI, fintech, and data science continues to outpace supply. "We guarantee internships in some programs like Business Intelligence, which sets students up well for tech jobs—especially in data analysis."¹⁶⁹

However, Conners acknowledged that institutional capacity has historically been limited, with career services staff stretched thin. This staffing constraint has made it difficult to scale or personalize support for students—particularly international students unfamiliar with Canada's job market. "That limits how much we can do... but we recently hired a second staff member, which should help a lot moving forward."¹⁷⁰ This positive development reflects momentum toward stronger support systems, but also underscores the need for continued investment in internship infrastructure—particularly in tech-aligned programs. As the chapter argues, employer-academic partnerships must be expanded to ensure that international students gain real-world, local experience and are integrated into London's innovation ecosystem early in their academic journey.

Conners also highlighted a recurring issue: many international students assume that better tech jobs and advancement opportunities exist only in Toronto, Vancouver, or abroad. Even when job roles in areas like data analysis, cybersecurity, or fintech development are available in London, they're often overlooked due to poor visibility or branding. "There are jobs here, especially in growing areas like data and business analytics, but students don't always know that. It's just easier to believe the opportunities are in bigger cities."¹⁷¹ This reinforces the chapter's argument that London's branding as a tech hub is underdeveloped. Without clear, targeted communication about local opportunities, even students in the most relevant programs may assume they need to relocate after graduation.

Interview #2: Morgan McKay, Information Technology Manager – Paystone

McKay highlighted that recent immigration policy changes—particularly the cap on international student permits and stricter work eligibility requirements—have disrupted

¹⁶⁹ Erie C., interview by Daivid M., April 1, 2025

¹⁷⁰ Ibid

¹⁷¹ Ibid

the flow of international graduates into the local workforce. This has made it more difficult for companies like Paystone to hire and retain skilled tech talent.

“We used to regularly meet international students nearing graduation, but now the pipeline feels tighter. If a candidate’s immigration status is unclear or delayed, it slows us down—and we sometimes lose great talent because of it.”¹⁷² This perspective reinforces the chapter’s analysis of how federal immigration policy shifts are reducing access to qualified talent in high-demand sectors such as fintech and cleantech, threatening London’s ability to sustain workforce growth.

According to McKay, while entry-level talent from local institutions remains strong, London struggles to retain professionals with 5–10 years of experience, many of whom leave for Toronto or international markets offering higher salaries and greater advancement opportunities. “Many of our experienced professionals end up in Toronto or working remotely for U.S. firms that can offer better compensation.”¹⁷³ This insight supports the chapter’s discussion of brain drain and talent leakage, especially in critical fields like AI and cybersecurity, where competitive salaries and opportunities elsewhere outweigh the advantages of staying in London.

McKay expressed strong support for a regional immigration stream—modeled after Atlantic Canada’s approach—to help local companies retain international graduates and fill persistent workforce gaps in the tech sector. “A student who trains here should have a smooth path to stay here. We need a system that actually supports employers—especially in cities like London.” The chapter’s policy recommendations advocate for targeted immigration reforms and OINP expansion to better serve mid-sized cities like London. Which ensures local employers can compete for and retain globally trained talent would be a great fix to this.

Strategic Recommendations

To strengthen London’s tech sector, the city must adopt targeted strategies that retain skilled workers, support employers, and improve immigration pathways. While recent growth has been impressive, sustaining that momentum depends on addressing talent shortages and workforce retention with long-term solutions.

Recommendation #1: Bridging Education and Employment to Retain Tech Talent

¹⁷² Morgan.M interview by Daivid M., April 2, 2025

¹⁷³ Ibid

Expanding partnerships between academic institutions and industry leaders is key to improving talent retention in London's tech sector. Despite strong graduate output from Western University and Fanshawe College in fields like AI, cleantech, and data analytics, many students lack engagement with local employers and look to larger cities for opportunities. Enhancing access to co-ops, internships, and mentorships would help students build early professional connections and increase awareness of local careers. Stronger collaboration can also align curricula with industry needs, ensuring graduates have relevant skills. However, this requires increased institutional funding and support for small businesses to host interns, potentially through incentives or reimbursements. Building these pipelines can help turn students into long-term contributors to the local economy.

Recommendation #2: Establishing a Regional Immigration Stream for London

A regional immigration stream is essential to addressing workforce gaps and retaining international talent in London. Existing programs like the PGWP, Express Entry, and OINP often favor larger cities such as Toronto, where employer sponsorships and nomination allocations are more concentrated.¹⁷⁴ This puts mid-sized cities like London at a disadvantage, despite their reliance on international students from Western and Fanshawe to fill roles in high-demand sectors like cybersecurity, fintech, and sustainable manufacturing. A region-specific stream, modeled after the Atlantic Immigration Program, would allow local employers to support international graduates in securing permanent residency, easing their transition into the workforce and boosting employer confidence.¹⁷⁵ Implementing such a stream requires coordinated advocacy from municipal leaders, post-secondary institutions, and industry stakeholders. Though politically challenging, this reform is necessary to ensure more balanced talent distribution and support London's long-term economic growth.

Recommendation #3: Financial Incentives

Supporting employers through financial incentives like wage subsidies and a dedicated Talent Retention Fund can help close London's salary gap with larger cities—a major barrier to retaining talent. While London's cost of living is lower, it struggles to match the competitive salaries offered in Toronto, Vancouver, or remote U.S.-based roles,

¹⁷⁴ontario.ca. "Ontario Immigrant Nominee Program Streams," n.d. <https://www.ontario.ca/page/ontario-immigrant-nominee-program-streams>

¹⁷⁵Immigration, Refugees and Citizenship Canada. "Atlantic Immigration Program." Canada.ca, February 24, 2025. <https://www.canada.ca/en/immigration-refugees-citizenship/services/immigrate-canada/atlantic-immigration.html>

especially for professionals in AI, fintech, and clean energy.¹⁷⁶ As a result, many skilled graduates leave or work remotely, contributing little to the local economy. Wage subsidies targeted at small and medium-sized firms—particularly startups—would help them offer more competitive pay, while a Talent Retention Fund could provide grants to support hiring in high-demand sectors. These measures would strengthen local workforce stability and boost economic resilience. However, their success depends on reliable funding, clear eligibility criteria, and strong accountability measures to ensure real impacts on job retention and business growth.¹⁷⁷

Recommendation #4: Positioning London as a Tech Innovation Hub

Positioning London as a recognized hub for innovation is key to reversing talent loss and attracting investment in its tech sectors. Despite growth in fintech, AI, and cleantech, the city remains overshadowed by larger Canadian tech centers, and many still view it as a temporary stop rather than a long-term career destination. A coordinated marketing campaign (domestic and international) could help shift this perception by highlighting London's sectoral growth, affordability, and strong academic-industry ties. Showcasing local success stories like Paystone and Trojan Technologies, and spotlighting emerging innovations in clean energy and AI, can build a compelling brand.

Launching an annual Tech Summit would further raise the city's profile, drawing in talent and investment while fostering collaboration—similar to Waterloo's True North or Toronto's Elevate. Still, branding alone isn't enough; it must be backed by real job opportunities, infrastructure, and meaningful support for startups to ensure the ecosystem is truly sustainable and inclusive.

Recommendation #5: Advocate for a Targeted Immigration Reform

Immigration reform is key to helping international graduates—vital to London's tech sector—stay and work in the region. While this builds on earlier calls for regional programs, an employer-driven approach adds important nuance. While current federal and provincial policies often favor larger cities like Toronto, it makes it harder for graduates in mid-sized regions like London to remain.¹⁷⁸ At the same time, employers

¹⁷⁶Thomas, Knowlton. "Tech Talent Salaries in the U.S. Continue to Outpace Canadian Counterparts." Tech Talent Canada, January 29, 2025. <https://techtalent.ca/tech-talent-salaries-us-canadian-counterpart/>

¹⁷⁷Maurice. "Wage Subsidy Ontario: A Guide to Government Support for Employers -," November 14, 2023. <https://ontariobusinessgrants.com/financing/wage-subsidy-ontario/>

¹⁷⁸"Ontario Immigrant Nominee Program Streams;Robitaille, Edana. "Understanding the Ontario Immigrant Nominee Program." CIC News, June 30, 2022. <https://www.cicnews.com/2022/06/understanding-the-ontario-immigrant-nominee-program-0626281.html>

face delays and red tape when trying to sponsor talent, discouraging them from hiring internationally.

A London-specific stream, modeled on the employer-focused elements of the Atlantic Immigration Program, could fast-track permanent residency for graduates in high-demand roles. Reforms should also fix gaps in the PGWP system by protecting students who take academic breaks or study part-time. Pushing this agenda forward will require coordinated advocacy from municipal leaders, employers, and post-secondary institutions. While politically challenging, a strong case built on London's innovation growth and workforce needs could drive support for more flexible, place-based immigration policies.

Recommendation #6: Expand the OINP

Expanding the Ontario Immigrant Nominee Program (OINP) to better support mid-sized cities like London offers a realistic and impactful way to strengthen the local talent pipeline. Currently, the OINP heavily favors applicants and employers in the Greater Toronto Area, leaving fewer nomination slots for cities like London—despite their growing demand for skilled workers in sectors like AI, cybersecurity, cleantech, and advanced manufacturing. Allocating more nominations to these regions would support balanced economic development and help local employers fill high-demand roles. Additionally, the OINP should expand its list of in-demand occupations to reflect emerging roles in tech. Employers in London often struggle to sponsor candidates whose roles don't align neatly with current NOC codes. Streamlining processing times for PGWP and PR applications would further reduce uncertainty for international graduates, encouraging them to stay and work locally. Unlike broader immigration reform, these provincial adjustments could be implemented quickly and serve as an immediate tool to retain global talent in London's innovation economy.

Conclusion

London, Ontario, stands at a pivotal crossroads. With an innovation economy growing at a remarkable pace—fueled by its leadership in fintech, clean technology, and artificial intelligence—the city has the foundations to become one of Canada's most dynamic mid-sized tech hubs. Yet, the promise of this transformation risks being undermined by a persistent talent drain, limited venture capital access, restrictive immigration pathways, and underdeveloped infrastructure.

If left unaddressed, these challenges will not only stall London's growth—they will accelerate the outmigration of its most promising professionals and entrepreneurs. The

findings of this chapter make clear that talent retention is no longer a secondary concern; it is the linchpin of London's innovation future. A sustainable and inclusive tech ecosystem requires far more than job creation—it demands a coordinated approach that links education, immigration, and economic development into one coherent strategy. By expanding academic-industry partnerships, reforming immigration pathways, investing in employer incentives, and enhancing London's global brand, the city can build a workforce ecosystem that rivals larger markets—while offering a uniquely livable and sustainable alternative. Now is the moment to act decisively. The global race for tech talent is accelerating, and London must seize this opportunity to lead—not follow. London's future as a tech powerhouse will not be decided by potential, but by policy. Bold action today will determine whether the city retains the minds shaping tomorrow.

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Appendix

Exhibit 1: Tech job growth in similar-sized cities between 2018 and 2023

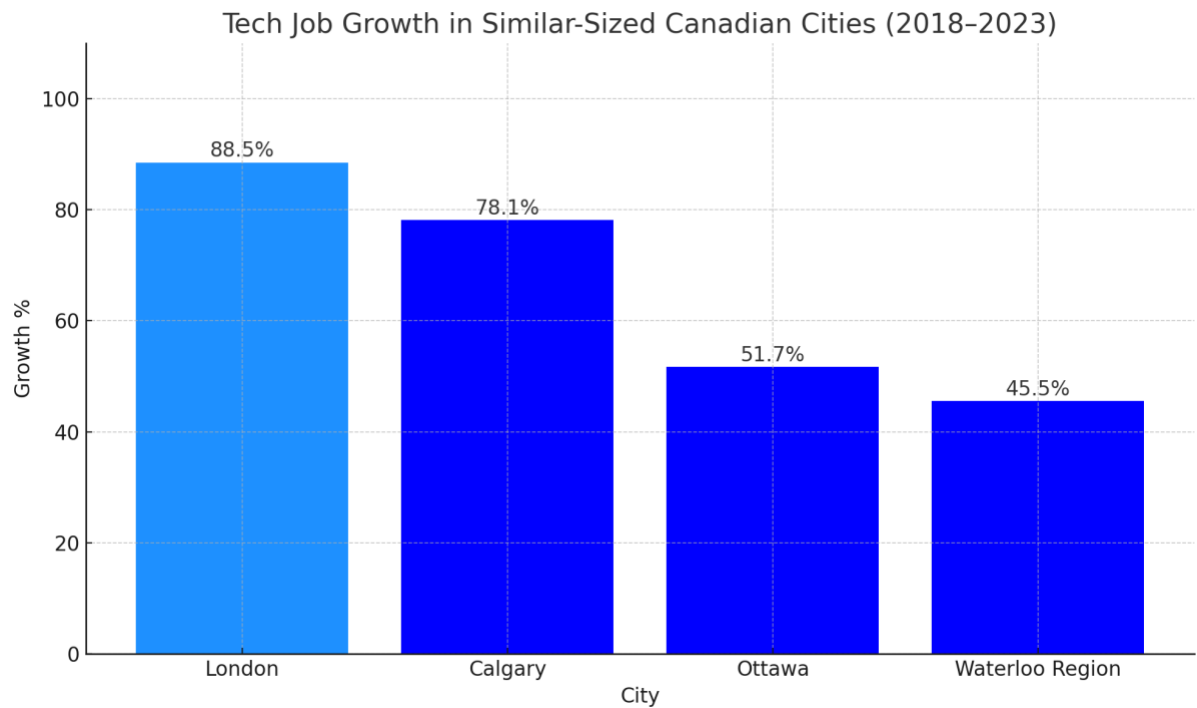


Exhibit 2: Average salary of a software engineer in different cities

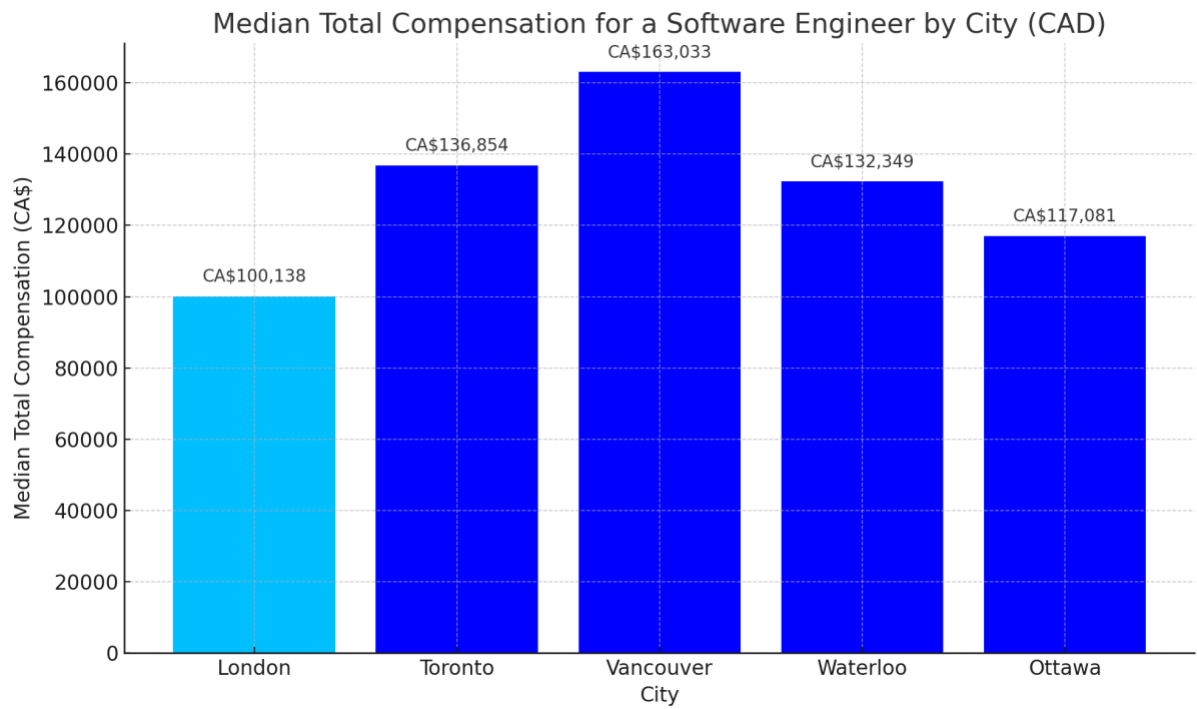
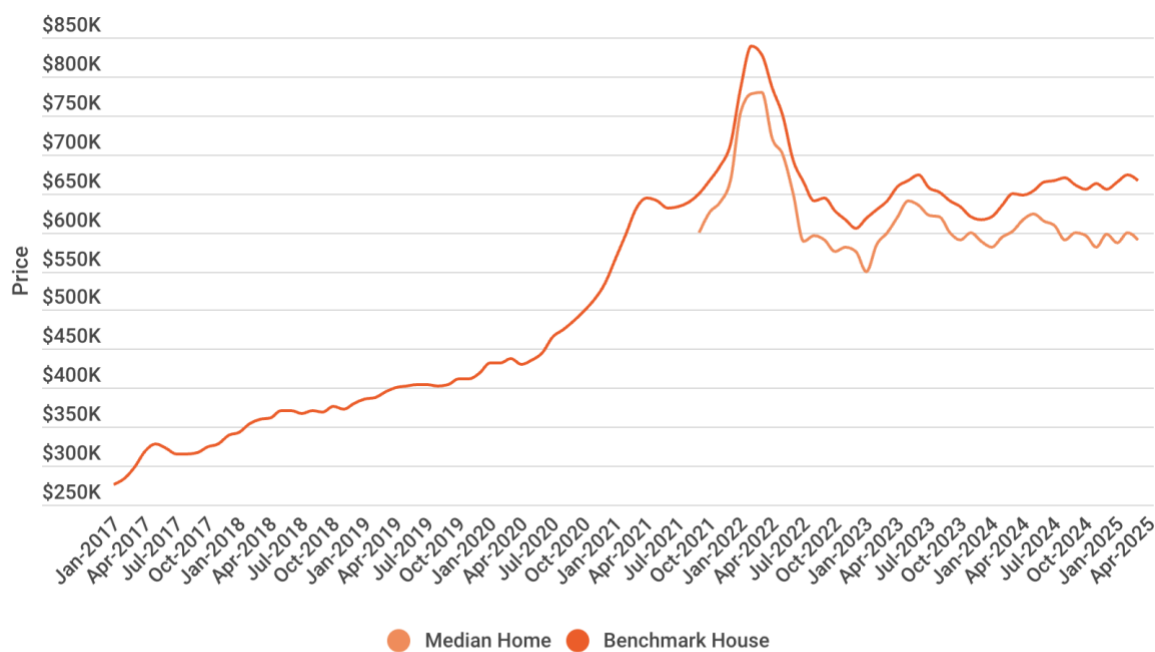


Exhibit 3: London house prices between 2017 and 2025.



Source: CREA and London St. Thomas Association of Realtors ® (STAR)
Note: Average prices are rounded to the nearest thousand



Chapter 13: Hospitality and Tourism

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Throughout history, the hospitality and tourism industries have relied on foreign students and immigrant workers to fill key jobs. Many domestic workers have sought employment in other industries due to the nature of the labour, which often involves long hours, physically hard activities, and relatively low earnings. As a consequence, overseas students have traditionally filled these responsibilities, often out of necessity. Many people work in hospitality to supplement their income while studying, particularly because these occupations are among the few that provide flexible hours and are willing to hire overseas workers with minimal Canadian experience¹⁷⁹. Furthermore, owing to employer prejudices or a lack of “Canadian experience,” overseas students typically struggle to get work in other areas, turning to hospitality as one of the few available possibilities.¹⁸⁰

In recent years, London’s hospitality industry has seen an increasing workforce crisis, with firms struggling to maintain acceptable personnel levels. Attrition rates in the business remain high, with many workers departing for higher-paying positions in other industries, driving up the need for new hiring¹⁸¹. The long-standing dependence on imported talent has helped to close this gap. However, recent federal immigration policy reforms, including harsher regulations around student work hours, restricted eligibility for post-graduate work permits, and increased limits on the TFWP, have curtailed the influx of foreign workers. Consequently, firms have substantial hurdles in hiring and maintaining talented staff. This persistent labour crisis jeopardizes the operational efficiency of enterprises throughout the sector, as hotels, restaurants, and tourist operators are unable to match customer expectations owing to chronic understaffing.

Policy Changes & Their Effects on the Industry

Policy Change #1: Cap on International Student Permits

Recent changes in Canadian immigration policy have had a clear and visible impact on the hospitality profession, most notably the federal government’s limit on foreign student visas, which went into effect in January 2024. The Canadian government, via Immigration, Refugees and Citizenship Canada (IRCC), has set a two-year restriction on the number of new foreign student visas in order to address housing shortages and burden on public services. Under this program, the number of new overseas study

¹⁷⁹ Canadian Hospitality Foundation, C. H. F. (2024). About. Retrieved from <https://thechf.ca/about/>

¹⁸⁰ Alexandra Miekus and Kareem El-Assal, “International Students Unable to Meet Canadian Work Experience Requirement Get Another Chance,” CIC News (Canada Immigration News, January 8, 2021), <https://www.cicnews.com/2021/01/international-students-unable-to-meet-canadian-work-experience-requirement-get-another-chance-0116783.html#gs.ks5b0z>.

¹⁸¹ Tourism HR Canada, T. H. C. (2024a). Tourism Labour Force Survey. Retrieved from <https://tourismhr.ca/labour-market-information/tourism-labour-force-survey/>

permits was lowered by 35% throughout the country, with certain regions, such as Ontario, seeing even higher reductions.¹⁸² This shift has had a substantial impact on industries such as hospitality and tourism, which have traditionally relied on foreign students as a flexible and dependable workforce.

In addition to the limit, the qualifying standards for a post-graduate work permit (PGWP) have been amended. As of September 1, 2024, overseas students participating in programs given via public-private partnerships would no longer be eligible for PGWPs, discouraging participation in numerous hospitality and tourism diploma programs, which are often offered by these institutions.¹⁸³ Previously, overseas students commonly worked part-time at hotels, restaurants, and tourist attractions to supplement their income while studying. However, the reduction in student permits, combined with stricter limits on off-campus work hours (previously capped at 20 hours per week and only temporarily lifted during the pandemic), has resulted in a significant drop in the number of international students available for part-time positions in the sector.¹⁸⁴ These innovations have exacerbated the industry's employment shortages while disrupting its conventional talent pipeline.

Policy Change #2: Changes to Post-Graduation Work Permit (PGWP)

Changes to Post-Graduation Work Permit (PGWP) eligibility are another key reform in Canadian immigration policy that has had a substantial influence on the hotel industry. These universities often attract overseas students who want to get Canadian job experience and go into long-term positions in the sector following graduation. The PGWP has traditionally permitted graduates to work in Canada for up to three years, providing a crucial pathway to permanent status.¹⁸⁵ However, the tightening of PGWP eligibility, along with the federal government's increased focus on luring high-skilled individuals in STEM and health disciplines, has devalued service-oriented industries such as hospitality and tourism. Foreign graduates of hospitality schools now find increasing difficulties obtaining both work permits and permanent residence, even if they have Canadian education and job experience. This move has significant implications for employers. Businesses that previously depended on overseas graduates to fill mid-level and managerial positions roles that need particular training, language abilities, and local experience are now facing extra recruiting challenges, worsening the current labour scarcity.

¹⁸² Government of Canada. "Canada to Stabilize Growth and Decrease Number of New International Student Permits Issued to Approximately 360,000 for 2024." News release. January 22, 2024. <https://www.canada.ca/en/immigration-refugees-citizenship/news/2024/01/canada-to-stabilize-growth-and-decrease-number-of-new-international-student-permits-issued-to-approximately-360000-for-2024.html>.

¹⁸³ Ibid

¹⁸⁴ Ibid

¹⁸⁵ Government of Canada, "Canada to Stabilize Growth."

Policy Change #3: Reforms to the Temporary Foreign Worker Program (TFWP)

New limits on the TFWP have posed new challenges for hospitality firms looking to meet persistent labour shortages. The Canadian government, via Employment and Social Development Canada (ESDC) and Immigration, Refugees and Citizenship Canada (IRCC), implemented a series of changes in 2022–2024 that tightened the standards for hiring foreign workers.¹⁸⁶ One key criterion is that companies do a Labour Market Impact Assessment (LMIA), which entails demonstrating that no competent Canadian citizens or permanent residents are available for the employment.

The LMIA procedure has grown more demanding, time-consuming, and costly, with more documents, lengthier processing periods, and sector-specific limitations. For example, as of April 2022, the government implemented sector limitations, which restrict the proportion of low-wage TFWs that businesses in areas like hospitality may hire. These actions were part of the TFWP Workforce Solutions Road Map, which sought to minimize long-term dependency on temporary workers¹⁸⁷. Because of the regulatory complexity and expense of the LMIA procedure, many hospitality organizations are hesitant to use the TFWP as a workforce alternative. As a result, many hotels, restaurants, and tourist operators are operating with understaffed personnel, which has a direct influence on service quality, customer happiness, and long-term economic sustainability.¹⁸⁸

Policy Change #4: PGWP Restrictions Based on Program Type and Labour Market Demand

The hospitality talent pipeline is now severely stretched owing to falling participation in hospitality-related school programs. Colleges and institutions in London, such as Fanshawe College, have long provided tourism and hospitality management programs that functioned as important entry points into the business. These programs were particularly appealing to overseas students, who saw them as a way to get Canadian job experience before seeking for permanent immigration.

¹⁸⁶ Employment and Social Development Canada, *Backgrounder: Temporary Foreign Worker Program Workforce Solutions Road Map* (2022), <https://www.canada.ca/en/employment-social-development/news/2022/04/backgrounder-temporary-foreign-worker-programworkforce-solutions-road-map.html>.

¹⁸⁷ Employment and Social Development Canada. "Backgrounder: Temporary Foreign Worker Program Workforce Solutions Road Map." Canada.ca. Government of Canada, April 4, 2022. <https://www.canada.ca/en/employment-social-development/news/2022/04/backgrounder-temporary-foreign-worker-programworkforce-solutions-road-map.html>.

¹⁸⁸ Tourism HR Canada, "The Role of Immigration Policy in Addressing Labour Shortages in the Tourism Sector," 2024, <https://tourismhr.ca/labour-market-information/reports/workforce-strategy/the-role-of-immigration-policy-in-addressing-labour-shortages-in-the-tourism-sector/>.

However, subsequent immigration policy changes have rendered these schemes far less tempting.

In 2024, the IRCC implemented reforms that have a direct influence on the PGWP. The new regulation, which goes into effect in September 2024, stipulates that foreign student enrolling in programs that do not correlate with professions suffering long-term labour shortages such as hospitality will no longer be eligible for a PGWP if they start their studies after November 2024¹⁸⁹. Furthermore, under additional changes announced in January 2024, overseas students studying at public-private partnership (PPP) universities, where many hospitality degrees are offered, would no longer be eligible for PGWPs. As a consequence, foreign students are increasingly choosing degrees in high-demand industries like health care, engineering, and information technology fields that are still supported by the PGWP program and are seen favourably for permanent residence applications.¹⁹⁰

These students are also selecting other nations, such as the United Kingdom or Australia, which provide more solid and simple post-graduate opportunities for hospitality workers¹⁹¹. What makes hospitality degrees less appealing is not just the absence of PGWP eligibility, but also the idea that positions in the industry are low-wage, physically demanding, and provide little long-term career advancement. For overseas students who have spent tens of thousands of dollars on their education, the return on investment in hospitality has become unpredictable and, in many instances, unsatisfactory. This change in student behaviour has resulted in a significant decrease in enrollment in hospitality-related programs, eroding the industry's traditional talent pipeline and exacerbating current employment shortages in Canada's hotels, restaurants, and tourist operations.

Beyond the immediate staffing problems, the continuous decline in foreign student enrollment in hospitality programs has far-reaching consequences for both the education sector and the hospitality industry's long-term viability. Colleges and universities throughout Ontario, especially those with a significant foreign enrollment, depend substantially on tuition revenue to support operations and program expansion. As enrollment declines, universities are obliged to decrease staff, course offerings, and, in some circumstances, completely halt hospitality programs, eroding the infrastructure that supports industry training.¹⁹²

¹⁸⁹Government of Canada, "Canada to Stabilize Growth."

¹⁹⁰ Jennie Wong, "New Limits on International Students Are Causing Turmoil Among Colleges, Universities," CBC News, 2024, <https://www.cbc.ca/news/canada/intl-student-cap-restrictions-reax-1.7328052>.

¹⁹¹ Ibid

¹⁹² Kostuch Media Ltd. "Decline of Study Permits Affects Ontario Colleges - Foodservice and Hospitality Magazine." Foodservice and Hospitality Magazine, January 28, 2025. <https://www.foodserviceandhospitality.com/decline-of-study-permits-affects-ontario-colleges/>.

Broader Implications of Enrollment Decline

This restriction not only restricts access to formal hospitality education, but it also decreases the industry's capacity to build a future workforce that is responsive to changing service demands. As fewer students pursue hospitality-related sectors, the skills gap grows, particularly in areas like management, guest relations, and operations, which need more than entry-level expertise. The loss of internship and co-op ties with educational institutions also erodes industry-academia cooperation, which has traditionally been a critical route for talent development and service innovation.¹⁹³

Furthermore, regional economies like London's, which rely on thriving tourist industries, face an economic downturn if hospitality enterprises are unable to sustain service standards or workforce levels. Reduced program enrollment and talent loss might have an influence on destination attractiveness, tourist satisfaction, and the city's image in the competitive tourism industry.

Industry Insights: Interviews with Experts

To obtain a better understanding of the impact of the immigration policy changes on London's hospitality industry, two interviews were conducted with experts in the field.

Interview #1: Jasleen Kaur, Owner, Spice & Steam Bistro, London, ON

Jasleen Kaur was interviewed for this chapter, the proprietor of Spice & Steam Bistro, a tiny yet popular restaurant in central London. With over 12 years of experience in the hotel sector, Jasleen provided a profoundly personal and genuine viewpoint on the present issues she is experiencing. She noted that recruiting for front-line positions like dishwashers, janitors, and line cooks has become a constant challenge. In the past, overseas students have consistently performed these jobs with passion and dependability. "They used to come in with vitality," she said, "and they'd become part of our family here. What about now? They just aren't arriving like they used to." The effect of this workforce scarcity has been significant. With fewer part-time employees available, Jasleen has had to depend largely on her core crew. "I have a server who's been doing double duty in the kitchen, and my line cook hasn't had a proper weekend off in over a month." To alleviate the burden, she has taken painful choices, such as cutting weekday hours and discontinuing weekend brunch service, which was formerly one of their top earners.

¹⁹³ Tourism HR Canada. *Canadian Tourism Labour Market Snapshot: October 2024*. 2024. <https://tourismhr.ca/2024/11/21/canadian-tourism-labour-market-snapshot-october-2024/>.

She also told the tale of Ali, the bistro's former sous chef who graduated from culinary school in India. Ali had spent years developing his profession in Canada and was committed to remaining for the long haul. However, when revisions to the PGWP prevented him from obtaining permanent residence, so he was forced to depart¹⁹⁴. "We were devastated," Jasleen said. "He was talented, loyal, and part of our family."

Jasleen's story exemplifies how recent IRCC immigration policy changes, specifically the 2024 student permit maximum and PGWP restrictions, are directly affecting small companies. These experiences are consistent with wider trends identified in papers by Tourism HR Canada (2023) and Foodservice and Hospitality (2024), which indicate a diminishing hospitality talent pool and the weakening of established labour channels¹⁹⁵.

Significant takeaways- Interview #1

The loss of foreign student labour is leading small company owners to face not just operational challenges, but also emotional and community-level stress. Reduced access to part-time student labour and visa hurdles for competent foreign graduates are resulting in service reduction, exhaustion, and increased turnover. Labour shortages are more than simply economic difficulties; they are personal, emotional, and unsettling for enterprises that rely on people and connections. These anecdotes personalize the facts and trends presented in the chapter, highlighting the real-world implications of government immigration laws for Canada's hospitality workforce.

Interview #2: Michael Tran, Hospitality Program Coordinator at Fanshawe College

The second interview was with Michael Tran, Fanshawe College's Hospitality Program Coordinator, who has over a decade of experience working directly with students, teachers, and industry partners. Michael provided a realistic and worrying look at how immigration policy changes are not only limiting enrollment, but also endangering the future of hospitality education in Canada. "In the last two intake cycles, we've seen a nearly 40% drop in international student applications to our hospitality programs," he told me. "It's not simply a number. That is a lost class, a lost cohort. And if this tendency

¹⁹⁴ Patrick Nash, "Explained: How Will New PGWP Eligibility Criteria Affect the Canadian Market?" *The PIE News*, 2024, <https://thepienews.com/canada-reacts-pgwp-eligibility-criteria/>.

¹⁹⁵ Kostuch Media Ltd. "Decline of Study Permits Affects Ontario Colleges - Foodservice and Hospitality Magazine." *Foodservice and Hospitality Magazine*, January 28, 2025. <https://www.foodserviceandhospitality.com/decline-of-study-permits-affects-ontario-colleges/>.: Tourism HR Canada. *Tourism HR Canada Annual Report 2022–2023*. Ottawa: Tourism HR Canada, 2024. <https://tourismhr.ca/2022-2023-annual-report>.

continues, we will be obliged to reduce or possibly discontinue some initiatives entirely.”

Unlike previous years, when hospitality programs were packed with eager international students, many of whom saw the field as a springboard to meaningful work and permanent residency, today’s applicants are gravitating toward fields perceived as more ‘immigration-friendly,’ such as business analytics, computer programming, and nursing. “I’ve had students transfer out mid-semester,” Michael continued. “They say- I like hospitality, but I have to look long-term. Canada is no longer emphasizing this field. And they’re right: it’s sad.”

One of the most important hardships raised by Michael was the influence on industry-academic cooperation. “Hotels and restaurants that used to request three or four co-op students per term are now reaching out less, not because they don’t need help, but because we don’t have the students to send them,” he told me. “This used to be a mutually beneficial cycle: students obtained real-world experience, and employers gained new talent. “The loop is breaking.”

Significant takeaways- Interview #2

Colleges like Fanshawe are contemplating reducing hospitality degree offerings owing to declining enrollment and class numbers. Students are intentionally transferring out of hospitality degrees, even if they are enthusiastic about the subject, as a result of immigration policy changes that are detrimental to the business. The disappearance of co-op and internship options, which were formerly a cornerstone of hospitality education, means that students miss out on real-world experience while employers lose access to developing talent. This insight from an academic expert extends beyond job concerns, demonstrating how government legislation is disturbing the education-to-employment pipeline, possibly lowering the quality and future of hospitality leadership in Canada.

Outlook for the Future and Potential Recommendations

If restrictive immigration laws continue, London’s hospitality and tourism industries are anticipated to face even more severe worker shortages in the future. According to the Tourism Industry Association of Ontario (TIAO) and Tourism HR Canada, reductions in international student permits and tighter post-graduate work permit (PGWP) eligibility implemented by the federal government of Canada through IRCC are already affecting the sector’s labour access and are expected to worsen workforce gaps in the coming

years¹⁹⁶. In response, some firms have started to rely on alternative operational solutions such as self-service kiosks, mobile ordering systems, and robotic servers to make up for personnel shortages. While technology may help fill fundamental service gaps, it cannot completely replace the individualized human contact that distinguishes the hospitality experience. As a result, a long-term, people-focused workforce strategy is required.

Recommendation #1: For one, the federal government should redefine immigration policy to acknowledge hospitality and tourism as vital businesses in Canada's economy. This would include changing the PGWP and permanent residence procedures to provide extra assistance to graduates of hospitality degrees. For example, creating a sector-specific permanent residence stream or restoring PGWP eligibility for programs delivered via public-private college collaborations might assist recruit and retain talented foreign workers.

Recommendation #2: Furthermore, establishing formal job pipelines via collaborations between postsecondary institutions and hospitality industries can help students find jobs during/after school. These collaborations might include direct-to-hire co-op programs, provincial nominee endorsements, or guaranteed job placements after graduation, which would assist to anchor overseas graduates in the local workforce. A similar method is already being tested in the manufacturing business, as explained in a subsequent chapter of this book. Employers are working with universities to provide apprenticeship programs that involve job offers, training, and visa sponsorship upon completion. This strategy might be adopted for the hotel industry to improve staff development while simultaneously reaching immigration targets. If properly implemented, such ideas would help to ensure the long-term stability, competitiveness, and resilience of London's hospitality and tourism industries.

Conclusion

London's hospitality and tourism industries are now at a crossroads. Recent changes implemented by the federal government, such as a cap on international student permits, stricter PGWP eligibility, and increased restrictions on the TFWP have significantly reduced the availability of international labour. At the same time, these immigration changes have led to a decrease in enrollment in hospitality-related postsecondary programs, further narrowing the future talent stream. Together, these

¹⁹⁶ Tourism HR Canada and StrategyCorp Institute of Public Policy and Economy. *The Role of Immigration Policy in Addressing Labour Shortages in the Tourism Sector*. Tourism HR Canada. Accessed April 1, 2025. <https://tourismhr.ca/labour-market-information/reports/workforce-strategy/the-role-of-immigration-policy-in-addressing-labour-shortages-in-the-tourism-sector/>; Tourism HR Canada. *Tourism HR Canada Annual Report 2022–2023*. Ottawa: Tourism HR Canada, 2024. <https://tourismhr.ca/2022-2023-annual-report>.

changes have resulted in severe labour shortages, jeopardizing service standards, operational capacity, and long-term industrial growth.

If these trends continue, the industry may struggle to retain the labour needed to fulfill current and future demand. As a result, purposeful legislative changes such as reinstating PGWP access for hospitality graduates and establishing sector-specific permanent residence pathways must be combined with industry-led solutions. This can include education-to-employment pipelines and strategic automation. Concerted efforts as such are critical to ensuring that London's hospitality business is sustainable, competitive, and lively in the years to come.

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Part III: Conclusion

Conclusion

London has long been known as a city for students. The community ranks among the highest in Canada for post-secondary students as a percentage of the overall population; in other words, post-secondary students play an essential role in the vibrance of the city, the local economy, and London's position in Canada and the world.

This volume has examined the local impacts on a major recent federal policy change: limits placed in the number of international students who are being (and will be in future years) welcomed to study in London. Much has been written about the highly consequential impacts of this federal policy change on universities and colleges, where reductions in government funding have been coupled with increasing reliance on international student tuition fees. Less has been written on how this federal policy change will impact the dynamics of local communities. For London, this volume aims to help fill this gap.

The Part I chapters set a strong context: why students, and specifically international students, are so important for our city. It outlines the many ways that London is reliant on students, and offers a critical perspective on the too-frequent tendency to treat these students as a temporary commodity rather than vital members of the community. Blaming any part of the housing crisis on international students also seems misplaced, and those who imagine that capping international students will 'solve' challenges of housing availability and affordability are sure to be disappointed.

The Part II chapters present a more focused sector-specific look at how the federal policy change may influence key sectors. The short answer, of course, is that the impacts are not yet fully known. In some cases, such as the pipeline of talent into areas such as early learning and childcare, the effects are being felt already (although the shortages are not exclusively a product of this cap; other challenges such as underfunding and low wages are also identified as contributors). The uneven effects of this cap on the newcomer population – for example, in the nonprofit sector where immigrant women have often found their starting place, and so both talent pipelines and professional mobility of immigrant women may be disproportionately affected – are also highlighted.

In other cases, the implications are less known. For advanced manufacturing and financial services, for example, the pipeline of talent is well connected to London's post-secondary institutions but the makeup of the students in these programs is perhaps less of a professional concern for business owners at this time. Over time, the pipeline of talent into these programs may produce challenges.

One thing is clear from this study: **the federal international student cap will have significant implications for the London community.** Post-secondary students are a key part of the community – socially, culturally, economically, politically and more – and are essential to London's place in Canada and the world.

There are many recommendations, often sector-specific, captured in this report. The City of London and other organizations with an interest in the social and economic future of the community would be wise to consider these as part of strategic planning work on future actions.

In addition, **the City of London and partner organizations should advocate for opening new pathways for international students to come, study and stay in London.** The local impacts of this policy change may not be fully understood, but it is already clear that there will be significant and wide-reaching impacts for the London community. Regular communication with federal officials, including advocacy for opening pathways for international students to study, live and work in London, will be an important part of keeping this critical pipeline of talent flowing into the community.

HEART OF HURON

This wall celebrates the community members who took a stand to support Huron's vision of challenging students to Lead with Heart. Each name represents an individual or family who recognizes the world is crying out for young people who not only have the knowledge and skills to lead but do so while choosing to act ethically.

Thank you for believing in Huron's ability to foster our students' potential. May they follow your example and put the needs of others before all else, making the world a better place by paying your generosity forward.





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