

Sector Profile

Educational Services

Atlantic Region

2023

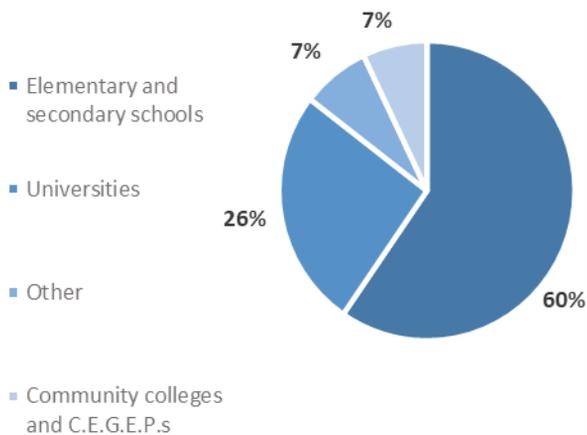


HIGHLIGHTS

- The educational services sector, representing 7.7% of employment in Atlantic Canada, is centred on the publicly funded provincial primary and secondary school systems, and the extensive number of post-secondary institutions.
- The workforce is comprised of highly educated individuals, of whom more than two-thirds are female, and who are commonly 45 years or older. Moreover, one-third are teachers at the K-12 level.
- Employment in this sector has grown at a much faster pace since 2019, likely due to recent unprecedented population growth. Also, strikes have been common in recent years, particularly among educational support staff.
- Employment growth in this sector is expected to continue through 2025 (+0.4% per year), although at a slower pace than the overall workforce (+0.7%). Increases in population, public funding, and enrolments should support job growth, especially in Prince Edward Island (+0.7%), where sectoral employment is projected to grow the fastest.

ABOUT THE INDUSTRY

Employment Share by sub-industry



Source: Statistics Canada, Labour Force Survey 2022

Composition and Importance of the Sector

Educational services include public and private establishments that provide education over a wide spectrum of ages and specializations. In Atlantic Canada, the majority of elementary and secondary schools (K-12) are publicly funded. Universities and colleges, meanwhile, typically receive both private and public funding, while some entirely private institutions also exist. In 2022, close to two-thirds (59.6%) of the 90,600 workers employed in educational services worked in elementary and secondary schools, while the remainder were employed primarily in universities (25.9%) and community colleges (7.1%). Businesses and associations within the other sub-industry include a broad range of specialized learning on disabilities, athletics, as well as safety and occupational training and many others.

Compared to 2021, the distribution of employment in this sector changed moderately. University employment had the highest gains, increasing their employment share in the sector by 3.3 percentage points. The share of workers employed in elementary and secondary schools went down by 2.2 pp., but still comprises the majority of employment in the sector.



Geographic Distribution of Employment

Of the Atlantic provinces, Nova Scotia had the largest number of workers in the sector in 2022, though educational services comprised the largest share of total employment in New Brunswick. Sectoral employment rose by 2,500 in New Brunswick on an annual basis, and fell in both Nova Scotia (-1,300) and Prince Edward Island (-400). The number of educational services in Newfoundland and Labrador was little-changed (+200) compared to 2021.

Overall, educational services is an important part of the economy across all provinces and employs approximately 8% of the workforce in Atlantic Canada.

	Employed 2022	Industry Share (%)
Atlantic Canada	90,600	7.7%
Newfoundland and Labrador	17,100	7.4%
Prince Edward Island	5,900	7.0%
Nova Scotia	36,400	7.5%
New Brunswick	31,200	8.4%

Source: Statistics Canada, Labour Force Survey

WORKFORCE

Workforce Characteristics

The vast majority of the workforce in the sector are unionized, public-sector employees, covered under collective bargaining. Moreover, these workers are highly educated, with 68.2% holding a university degree in 2022.

The distribution of ages in this sector has remained relatively unchanged year-over-year, and is similar to that of the labour force as a whole. In 2022, 90% of the workforce were between the ages of 25 to 64 with those aged 45 to 64 years accounting for nearly half. The share of workers in the 45 to 64 age group fell by one percentage point in 2022, while the 15 to 29 age group gained that lost percentage point with the fastest growth rate, at 11%. Workers between the ages of 25 to 45 accounted for 88.5% of total employment growth for this sector with over half of that growth comprised of 25 to 29 year olds (52.1%).

The sex composition of educational services was also little-changed in 2022, as 68.9% of employees were female compared to 69.1% a year previous. Of the 2,600 employees that were added to workforce, 1,600 were female while 900 were male. Historically, females have accounted for a majority of employment in this sector, especially within elementary and kindergarten school teachers (89.0%).

Main Occupations

In 2022, teachers within the provincial education systems in Atlantic Canada represented the largest occupations in this sector, led by elementary school and kindergarten teachers. This occupation, along with secondary school teachers, account for one-third of all sectoral employment. The high level of educational attainment among workers in this sector reflects, in part, the educational requirements for teacher certification at the elementary and secondary levels. In addition, teaching assistants within these school systems also made up 8.6% of the labour force in the sector.

The remaining occupations within the top 5 reside within the post-secondary system, with University professors and lecturers and College and other vocational instructors making up 8.5% and 4.7% of employment, respectively.

Top 5 largest occupations	Employed 2022	% Share of Industry
Elementary school and kindergarten teachers	20,750	22.9%
Secondary school teachers	9,550	10.5%
Elementary and secondary school teacher assistants	7,775	8.6%
University professors and lecturers	7,700	8.5%
College and other vocational instructors	4,275	4.7%

Source: ESDC/Service Canada



RECENT HISTORY

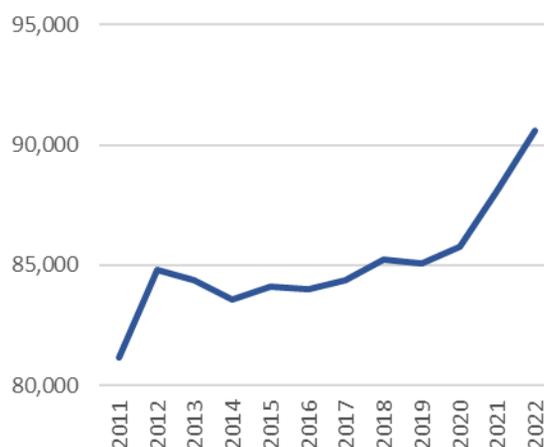
Employment in educational services has risen sharply over the past few years, adding 5,500 workers since 2019. The number of workers expanded by 2.6% in 2021 and 2.9% in 2022. Employment levels in 2020 also rose by 0.9%, as provincial governments aimed to keep public schools open as much as possible during the COVID-19 pandemic.

In the past couple of years, rapid inflation has resulted in upward pressures on wages. The rising cost of living relative to wage levels among educational assistant workers and school support staff has contributed to collective bargaining disputes. Thousands of workers in multiple school boards in Nova Scotia went on strike in 2022 and 2023. Ontario also saw 55,000 education support workers go on strike during 2022. Vacancies for this occupation remain high and could be an opportunity for employment growth in the near future. Furthermore, labour demand is also high for casual positions such as bus drivers and custodial staff as vacancies remained unfilled.

Job vacancies in the educational services sector hit a record high of 1,360 in Q3 of 2022. This was primarily driven by high vacancies in Nova Scotia (755), which had more vacancies than all other Atlantic provinces combined and significantly more than similarly-sized New Brunswick (210). This large gap in labour demand between Nova Scotia and other provinces in the region has been present since 2020. It is worth noting that recent unemployment levels in the sector have remained low relative to historical trends (ignoring the typical summer unemployment for teachers). This has resulted in a tighter labour market in Nova Scotia with a ratio as low as 1.6 job seekers per vacancy, compared to 7.3 in 2015 previously. In contrast, New Brunswick had a ratio of 7.8 during this same period due to a much smaller number of vacancies. As a result, job seekers may have a better chance of finding work in Nova Scotia compared to the other Atlantic Provinces.

The Faculty of Education at the University of New Brunswick (UNB) accounted for the largest proportion of degrees granted (16.2%) at the institution, while the same faculty at Memorial University (MUN) in Newfoundland and Labrador had the highest percentage of graduate level enrolment at 19.7% during the 2022/23 school year. Both of these schools are the largest post-secondary institutions in their respective provinces. Enrolment in education programs has remained stable despite rising tuition rates. Continued enrolments in these programs should provide a stable supply of labour that meet the

Historical Employment Trend Atlantic Canada



Source: Statistics Canada, Labour Force Survey

educational requirements for teaching positions.

More generally, full-time enrolments at universities during the 2022-23 school year increased by 2.8% (+2,256) over the year prior, while K-12 public schooling also rose modestly, up 2.7% (+8,296). Annual population estimates for school-aged youth (ages 5 to 18) in 2022 grew by 2.2% (+7,513) after a 0.3% decline (-892) the year before.

International student enrolment in Atlantic universities has surged in recent years and continues to be a primary source of newcomers to the region. In 2022, there were 21,812 international students enrolled full-time in the region within Atlantic universities, this was up 15.5% compared to the year previous. Just five years previous levels were at 13,784 students, or 60.8% less compared to 2022. This demonstrates that recruitment efforts in recent years have proved effective in attracting international students to the region.

Some of the notable capital projects during 2022 in this sector include: \$105M from the Nova Scotia government towards healthcare research and training in rural universities, \$46M in expansion and upgrades for the Trades Education Centre at the NBCC Saint John campus, and \$15M in federal funding to MUN for marine biomass research.



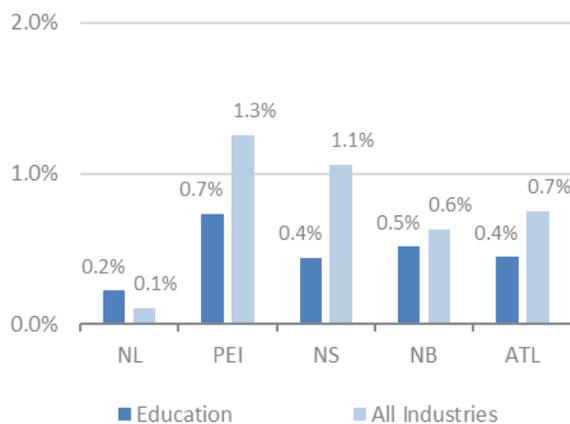
OUTLOOK

Although employment growth in educational services has accelerated in the last few years, it is expected to slow down to an annual average rate of 0.4% during the 2023 to 2025 period. This rate is almost half the pace of overall employment growth in Atlantic Canada.

Employment is projected to grow in all four Atlantic provinces. Prince Edward Island is forecasted to have the strongest job growth rate in this sector, at 0.7%, which is 0.6 p.p. below its overall growth rate of 1.3%. Newfoundland and Labrador has the slowest projected growth rate, at 0.2%. Public school enrolment has not risen as quickly in N.L. as in the other Atlantic Provinces. Further, ongoing changes in provincial funding for the Memorial University of Newfoundland may limit post-secondary employment growth. Sectoral employment in Nova Scotia and New Brunswick is expected to grow at a pace of 0.4% and 0.5% respectively.

Much of the anticipated growth in this sector can be attributed to strong population growth in the maritime provinces in recent years. An influx of families with school-aged children has caused elementary and secondary school enrolments to increase following a long period of decline. From 2017 to 2021, an average of approximately 10,000 youth between the ages of 1 and 17 moved to Atlantic Canada per year. From 2021-2022 this amount increased further, to nearly 16,000. Enrolments are expected to continue to rise as high in-migration remains steady in the region, which may necessitate hiring to maintain staff-to-pupil ratios. At the university level, growth throughout the region has been driven by rapid increases of international student enrolment.

Projected Average Annual Employment Growth Rate (%), Atlantic Provinces, 2023-2025



Source: ESDC/Service Canada

Capital expenditures by provincial governments on education continue to grow despite rising interest rates. Some capital projects relate to increasing school capacity, reflecting rising enrolment levels and the additional staffing requirements associated with them.

Additionally, increasing demand in educational support roles represents upside risk to the forecast if the supply of readily available labour improves, leading to further growth to sectoral employment.

Note: In preparing this document, the authors have taken care to provide clients with labour market information that is timely and accurate at the time of publication. Since labour market conditions are dynamic, some of the information presented here may have changed since this document was published. Users are encouraged to also refer to other sources for additional information on the local economy and labour market. Information contained in this document does not necessarily reflect official policies of Employment and Social Development Canada.

The analysis in this report was finalized as of **September, 2023**.

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APPENDIX

Real GDP (2022) and Employment (2022) for Atlantic Canada

	Education			All Industries		
	Number	Share of		Number	Share of	
		Total	AAGR*		Total	AAGR*
Real GDP (M\$)	\$6,761.5	100.0%	0.8%	\$109,227.1	100.0%	1.0%
Newfoundland and Labrador	\$1,660.5	24.6%	0.1%	\$30,150.3	27.6%	0.1%
Prince Edward Island	\$445.0	6.6%	1.3%	\$6,542.6	6.0%	2.5%
Nova Scotia	\$2,651.9	39.2%	1.0%	\$40,011.5	36.6%	1.5%
New Brunswick	\$2,004.1	29.6%	0.9%	\$32,522.7	29.8%	1.1%
Employment (000s)	90.6	100.0%	0.7%	1175.2	100.0%	0.4%
Male	28.1	31.1%	-0.2%	596.0	50.7%	0.4%
Female	62.5	68.9%	1.1%	579.2	49.3%	0.5%
15-24 years old	5.2	5.7%	-1.4%	158.7	13.5%	0.4%
25-54 years old	64.7	71.4%	0.2%	734.4	62.5%	-0.2%
55 years and older	20.8	22.9%	3.1%	282.1	24.0%	2.2%
Worked full-time	74.7	82.4%	1.1%	990.6	84.3%	0.6%
Worked part-time	15.9	17.6%	-1.2%	184.6	15.7%	-0.4%
Self-employed	2.8	3.1%	2.1%	123.2	10.5%	-1.0%
Employees	87.8	96.9%	0.6%	1052.0	89.5%	0.6%
Permanent job	66.1	73.0%	1.3%	884.4	75.3%	1.0%
Temporary job	21.6	23.9%	-1.3%	167.6	14.3%	-1.4%
Less than high school	1.4	1.5%	-3.8%	95.5	8.1%	-3.9%
High school graduate	7.9	8.8%	-1.8%	275.3	23.4%	-0.5%
Postsecondary cert. or diploma	19.5	21.5%	0.0%	456.3	38.8%	0.3%
University degree	61.9	68.3%	1.4%	348.2	29.6%	3.3%
Newfoundland and Labrador	17.1	18.8%	-0.3%	232.5	19.8%	-0.3%
Prince Edward Island	5.9	6.5%	0.2%	84.3	7.2%	1.5%
Nova Scotia	36.4	40.2%	0.3%	484.9	41.3%	0.6%
New Brunswick	31.3	34.5%	1.7%	373.5	31.8%	0.5%

Source: Statistics Canada, Labour Force Survey - Custom Table; Table 36-10-0402-01

*Average annual growth rate for last ten years of available data (GDP 2013-22 and Employment 2013-22)

