

Sector Profile

Health Care and Social Assistance

Atlantic Region

2025

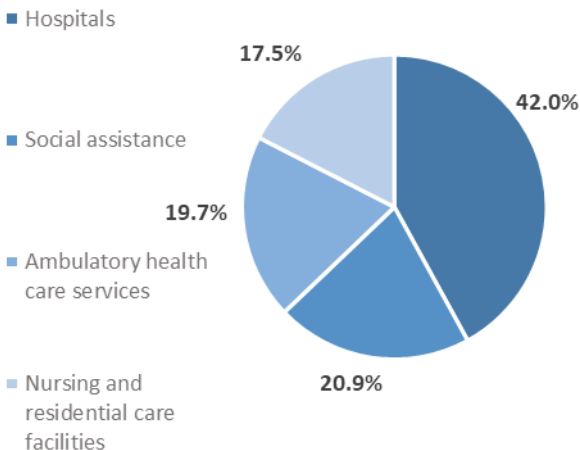


HIGHLIGHTS

- The health care and social assistance sector is the largest in Atlantic Canada by employment, accounting for 16.6% of the region's workforce and making up 10.6% of the region's total Gross Domestic Product.
- Among the workforce in this sector in 2024, nearly 84% of workers held full-time jobs, more than 81% were women+, most were highly educated, and the majority were in the prime working age range (25 – 54 years).
- Employment in the sector has been strong recently, with the number of workers rising to 209,300 in 2024. However, there is a significant shortage of workers along with rising demand for services from the aging of the population and a high prevalence of certain chronic diseases in the region.
- Job growth in this sector is projected to average 1.2% annually from 2025 to 2027, outpacing the region's overall forecasted employment growth by 0.6 percentage points.

ABOUT THE INDUSTRY

Employment Share by sub-industry



Source: Statistics Canada, Labour Force Survey 2024

Composition and Importance of the Sector

The health care and social assistance sector is comprised of establishments that provide health care by diagnosis and treatment; residential care for medical and social reasons; and social assistance such as counselling, community food and housing, and childcare.

In Atlantic Canada, the health care and social assistance sector comprised 16.6% of the total regional workforce in 2024, employing 209,300 individuals. This represents an increase of 10,700—or 5.4%—over 2023. Hospitals and social assistance are the two largest sub-industries and accounted for over 62% of the sectoral employment in 2024.

Economic activity in this sector was valued at over \$12.5 billion in 2024, contributing 10.6% of Atlantic Canada's total Gross Domestic Product (GDP).



Geographic Distribution of Employment

Newfoundland and Labrador (N.L.) had the highest concentration of employment in this sector, at 19.4% of its entire workforce. Prince Edward Island (P.E.I.) had the lowest share of employment, at 15.7%. In both Nova Scotia (N.S.) and New Brunswick (N.B.), the sector accounted for 16% of total employment. These two provinces represented more than the two-thirds of the sectoral workforce in the region in 2024, with 83,300 and 63,900 workers, respectively.

69% of workers in this industry lived inside the region's population centres which is higher than the overall workforce for all industries (62%).

	Employed 2024	Industry Share (%)
Atlantic Canada	209,300	16.6%
Newfoundland and Labrador	47,600	19.4%
Prince Edward Island	14,500	15.7%
Nova Scotia	83,300	16.0%
New Brunswick	63,900	16.0%

Source: Statistics Canada, Labour Force Survey

WORKFORCE

Workforce Characteristics

A large majority of jobs (81.4%) are held by women+, the highest proportion among the region's broad sectors. The share of workers aged 15 to 24 is lower (8.8%) than in all industries (13%), which is due in large part to the high number of positions in the sector that require a university education. The proportion of workers aged 55 and over is also lower (21.7%) than for all industries (23.2%), which may reflect the large share of workers covered by a pension plan and a tendency for some of workers to leave the industry mid-career due to burnout. The remainder of workers (69.5%) are in the prime working age range (25 – 54 years).

Around 84% of workers hold full-time jobs, a proportion similar to the average share for all industries (84.2%). Only 6.7% are self-employed, lower than the all-industry average of 9.5%.

Educational achievement among health care and social assistance workers is higher than average. More workers in this sector have either a post-secondary certificate or diploma (44.9%) or a university degree (37.6%) compared to the workforce as a whole (38.7% and 31.5% respectively). Only 3% of workers in this sector have no diploma at all (vs. 7% for all workers), and 14.5% have a high school diploma as their highest level of education (vs. 22.8%).

Main Occupations

In Atlantic Canada, the two largest occupations in this sector are related to nursing. Registered nurses and registered psychiatric nurses employed almost 13% of the industry's workforce in 2024 with 26,925 workers. The next largest was nurse aides, orderlies and patient service associates which employed 25,500 people.

Early childhood educators and assistants (ECEs) remained the third-largest occupation in the sector in 2024 with 12,200 workers. This was followed by home support workers, caregivers and related occupations and social and community service workers, which together accounted for nearly one-tenth of sectoral employment, with 11,975 and 8,400 workers, respectively.

Top 5 largest occupations	Employed 2024	% Share of Industry
Registered nurses and registered psychiatric nurses	26,925	12.9%
Nurse aides, orderlies and patient service associates	25,500	12.2%
Early childhood educators and assistants	13,925	6.7%
Home support workers, caregivers and related occupations	11,975	5.7%
Social and community service workers	8,400	4.0%

Source: ESDC/Service Canada



RECENT HISTORY

Employment in Atlantic Canada’s health and social assistance sector has trended strongly upward over the past decade, with an annual average growth rate of 2.3% since 2014. Job loss in the sector in 2020, associated with the COVID-19 pandemic, was muted compared to overall employment and was completely recovered in the following year. Employment has grown even more quickly since 2022, averaging 3.0% per year and reaching a historical high of 209,300 in 2024.

There are long-standing indications of labour shortages in the sector across Canada and in Atlantic Canada. Unfilled positions in health care and social assistance remain high nationally, with the industry recording the second-highest job vacancy rate of all sectors in May 2025 at 3.9%.

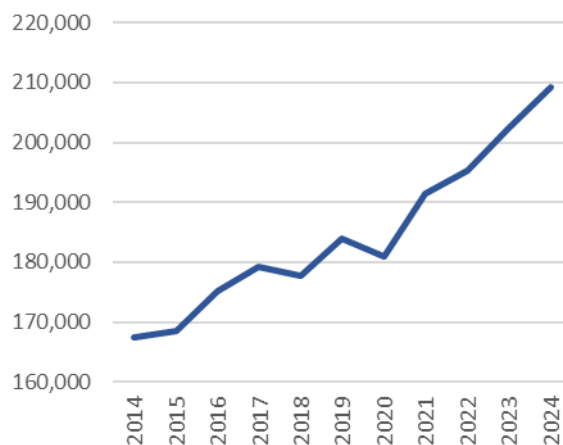
Health care employment plays a crucial role in the region’s labour market and has created the largest number of jobs over the last decade. It accounts for over 19% of employment in N.L.—the highest share among all provinces—and 16% in each Maritime province. Further, two Atlantic provinces topped the list of per-capita healthcare spending: \$8,715 in N.L. and \$7,588 in N.S. (compared to \$6,431 nationally).

A key concern is the aging population in Atlantic Canada, leading to more seniors requiring assistance for daily tasks or full-time care. Moreover, the prevalence of several chronic diseases such as obesity, cancer, diabetes, arthritis and high blood pressure is higher in Atlantic Canada than elsewhere in the rest of Canada.

The social assistance sub-industry also faces significant challenges in hiring and retaining qualified employees, especially in non-profit organizations (NPOs). Major barriers to recruitment and retention include salaries, benefits, and pension plans; the funding model of some NPOs can make it challenging to compete with government organizations offering higher wages and more appealing benefits to employees.

All four provincial governments have developed a range of incentives to counter labour shortages and support workforce development. All have increased their healthcare budgets for the 2025-2026 fiscal year with the goal of attracting new workers, including through international hiring. Further, changes have been made to simplify the recognition of foreign credentials for physicians and nurses.

Historical Employment Trend
Atlantic Canada



Source: Statistics Canada, Labour Force Survey

In March 2025, P.E.I. health officials stated that 101 job offers were made from recruitment trips to Singapore and Dubai. At the time, Health P.E.I. reported a 20% vacancy rate for all types of staff positions and a shortage of full-time workers. However, changes in immigration rules could impact recruitment for out-of-country hires, which are crucial for the sector.

The strong demand for health care has also driven higher levels of activity in adjacent industries that support or supply the health care and social assistance sector, such as pharmacies.

Demand for early childhood educators and assistants (ECEs) has been increasing considerably with the lowering of childcare fees as part of the ongoing implementation of Canada Wide Early Learning and Child Care Agreements. The number of ECE positions is expected to continue to increase through 2026 due to the planned creation of several thousand new childcare spaces under the agreement.



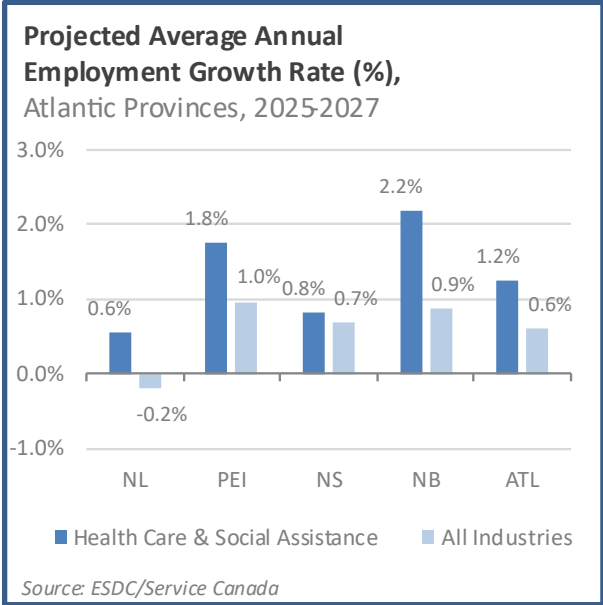
OUTLOOK

Employment growth in health care and social assistance is forecasted to average 1.2% over 2025 to 2027, surpassing the region’s overall projected employment growth by 0.6 percentage points.

All four Atlantic provinces are expected to see job growth in this sector through 2027. New Brunswick is projected to lead with a 2.2% average annual growth rate during this period, while Newfoundland and Labrador is expected to post a slower pace of 0.6% annually. In Prince Edward Island and Nova Scotia, industry employment is forecasted to grow at rates of 1.8% and 0.8%, respectively, also surpassing the overall employment growth projections in those provinces.

The health care challenges in the Atlantic region are intensified by an older population, a more rural demographic and persistent labour shortages. Spending in the sector is set to continue to rise at a relatively fast pace over the next two decades due to the aging population; the region was home to four of the five provinces with the oldest populations in Canada in 2024 and the number of people aged 85 and above is predicted to grow from 60,000 in 2024 to 160,000 by 2044. On average, the annual cost to provide health care to individuals aged 85 years and older in Atlantic Canada is \$35,000, about 10 times greater than for individuals aged 20 to 44.

In all four provinces, aggressive recruitment efforts have yielded an increased rate of hiring, and this is expected to continue driving solid employment going forward.



In New Brunswick, additional school seats are being allocated to students in the health care field, while Prince Edward Island offers full-tuition support to eligible individuals through the provincial Licensed Practical Nursing (and RCW's) and Paramedic Support Program. Similarly, Nova Scotia has made tuition for its continuing care assistant program free and implemented substantial wage increases for most levels of nursing under the current collective agreement.

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 2025**.

Prepared by: Business Intelligence and Labour Market and Analysis Directorate, Service Canada – Atlantic Region

For further information, you may contact us at: ATL-LMI-IMT-GD@servicecanada.gc.ca

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APPENDIX

Real GDP (2024) and Employment (2024) for Atlantic Canada

	Health Care and Social Assistance			All Industries		
	Number	Share of		Number	Share of	
		Total	AAGR*		Total	AAGR*
Real GDP (M\$)	\$12,630.2	100.0%	1.9%	\$118,731.2	100.0%	1.2%
Newfoundland and Labrador	\$3,009.3	23.8%	1.7%	\$29,645.2	25.0%	-0.3%
Prince Edward Island	\$800.2	6.3%	2.7%	\$7,604.7	6.4%	2.9%
Nova Scotia	\$5,026.7	39.8%	1.9%	\$45,644.6	38.4%	1.9%
New Brunswick	\$3,794.0	30.0%	1.8%	\$35,836.7	30.2%	1.4%
Employment (000s)	209.3	100.0%	2.3%	1258.7	100.0%	1.2%
Men+	38.8	18.6%	3.4%	640.8	50.9%	1.2%
Women+	170.4	81.4%	2.0%	618.0	49.1%	1.2%
15-24 years old	18.3	8.8%	2.1%	163.8	13.0%	0.9%
25-54 years old	145.5	69.5%	2.2%	803.1	63.8%	1.0%
55 years and older	45.4	21.7%	2.5%	291.9	23.2%	2.0%
Worked full-time	176.3	84.2%	2.6%	1057.5	84.0%	1.3%
Worked part-time	33.0	15.8%	0.4%	201.2	16.0%	0.5%
Self-employed	14.1	6.7%	-1.2%	119.1	9.5%	-1.1%
Employees	195.2	93.3%	2.6%	1139.7	90.5%	1.5%
Permanent job	171.0	81.7%	2.8%	967.1	76.8%	1.9%
Temporary job	24.2	11.6%	1.1%	172.6	13.7%	-0.5%
Less than high school	6.2	3.0%	-2.6%	87.9	7.0%	-3.1%
High school graduate	30.4	14.5%	2.3%	286.9	22.8%	-0.3%
Postsecondary cert. or diploma	94.0	44.9%	1.2%	487.2	38.7%	1.1%
University degree	78.7	37.6%	4.3%	396.8	31.5%	4.1%
Newfoundland and Labrador	47.6	22.8%	2.4%	245.0	19.5%	0.2%
Prince Edward Island	14.5	6.9%	3.6%	92.5	7.3%	2.3%
Nova Scotia	83.3	39.8%	2.2%	521.4	41.4%	1.6%
New Brunswick	63.9	30.5%	2.0%	400.0	31.8%	1.1%

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 2015-24 and Employment 2015-24)

