



Sectoral Profile

Educational Services

Atlantic Region

2018



KEY HIGHLIGHTS

- Educational services accounted for 7.6% of employment in Atlantic Canada in 2017, compared to 7.0% nationally.
- Employment in the educational services sector has been decreasing over the last 10 years, largely due to declining enrolments in elementary and secondary schools.
- Enrolment in elementary and secondary schools declined in all four Atlantic Provinces between the 2005/2006 and 2015/2016 school-years and university enrollment has also declined at the Atlantic level.
- The female proportion of the workforce in the sector has risen in the last 10 years, as has the number of workers over the age of 55 years.
- Employment in the educational services sector in Atlantic Canada is expected to grow by 0.4% annually over the next few years, a higher rate of growth than is projected for overall employment in the region.

INDUSTRY PROFILE

Educational services encompasses public and private establishments providing education over a wide spectrum of ages and specializations. In Atlantic Canada, the majority of elementary and secondary schools (K-12) are entirely publicly funded. Universities and colleges are typically partially publicly funded, while some entirely private institutions also exist.¹

In 2017 educational services accounted for 5.9% of Atlantic Canada's real Gross Domestic Product (GDP). GDP in the educational services sector expanded by 9.2% between 2007 and 2017, compared to a 4.6% increase in overall Atlantic GDP over the same 10-year period.²

¹ http://www.acoa-apeco.gc.ca/eng/publications/FactSheetsAndBrochures/Pages/FS_Educationandtraining.aspx

² CANSIM Table 36-10-0402-01

In 2017, employment in educational services in the Atlantic Region was 83,200, or 7.6% of total Atlantic employment. The unemployment rate in educational services was 4.2% in 2017, significantly lower than the average unemployment rate of 9.7% for the Atlantic Region.³

While overall employment in the Atlantic workforce is quite evenly divided between men and women, women accounted for the majority (65.4%) of employment in the educational services sector. Part-time employment is also more prevalent in the sector (19.1%) than in the overall workforce (16.5%) and more common among females. Part-time employment has remained stable as a proportion of the overall Atlantic workforce, while educational services has seen a decline from 23.6% in 2007 to 19.1% in 2017, primarily driven by more women working full-time.⁴

Of those employed in educational services in 2017, 96% were public-sector employees while public-sector employment accounted for approximately 29% of overall employment within Atlantic Canada. As should be apparent from this, self-employment in educational services was far less common than in the Atlantic Region's overall workforce (12.0%).⁵

Table One Employed Labour Force - Education Atlantic Canada and Canada		
	Atlantic	Canada
61 Educational services	100%	100%
6111 Elementary and secondary schools	62.0%	63.5%
6113 Universities	22.9%	19.3%
6112 Community colleges and C.E.G.E.P.s	6.9%	7.2%
6116 Other schools and instruction	6.0%	8.1%
6115 Technical and trade schools	1.1%	0.9%
6117 Educational support services	0.6%	0.6%
6114 Business schools and computer and management training	0.5%	0.4%

Source: Statistics Canada, 2016 Census of Canada, Table 98-400-X2016290

Within educational services, the elementary and secondary schools sub-sector accounted for the majority of employment (62%) in the region according to the 2016 Census. The next largest sub-sector is universities, accounting for 23,200 employees (22.9%). The community colleges and C.E.G.E.P.s (or Collèges d'enseignement général et professionnel) sub-sector employed 6.9% of workers in the educational services sector in Atlantic Canada and the other schools and instruction sub-sector followed with 6% of the sector's overall employment level.

RECENT HISTORY

Employment in the educational services sector has been relatively stable, diminishing at an average annual rate of just 0.1% since 2007, largely due to declining enrolments in elementary and secondary schools. Overall employment growth in Atlantic Canada was slow but positive at +0.1% annually. The education sector has also experienced proportionally larger employment variations over time.

³ CANSIM Table 14-10-0023

⁴ CANSIM Table 14-10-0023

⁵ CANSIM Table 14-10-0028

From 2007 to 2017 the employed workforce in educational services aged at a similar rate as the overall Atlantic workforce. The proportion of workers between the ages of 25 and 54 years decreased by just over seven percentage points from 78.6% to 71.3%, while the share of workers over the age of 55 years increased from 14.6% to 22.2%. Educational services employs a smaller proportion of young workers (ages 15 to 24 years) than the average for all industries in the region (6.4% versus 12.8% in 2017).⁶

The ratio of women to men employed in educational services has also been changing over time. The percentage of female employment has increased from 64.8% in 2007 to 65.4% in 2017. This trend is most pronounced in New Brunswick, where it has risen by 3.4 percentage points.⁷

In elementary and secondary schools, the last 10 years have been characterized by declining levels of both employment and student enrolment. From 2007 to 2017 employment declined by 6.7% and student enrolment in this subsector has declined from 346,017 ten years ago, to 302,598 in 2017, a 12.5% decrease.⁸ The number of Atlantic Canadians between the ages of 5 and 19 declined by 11.4% from 2007 to 2017, but the population in this age category has stabilized somewhat in more recent years and is forecasted to increase just slightly over the next 10 years and should impact both enrolment and employment in the school system.⁹

In the Atlantic Region, 22,599 secondary school students and 31,620 post-secondary students graduated in 2015. The number of secondary school graduates has been decreasing annually as have enrolments, while the number of post-secondary graduates has increased.¹⁰

Between the 2005/06 and 2015/16 academic years, university enrolment fell by 5.9% in the Atlantic Region. This was attributable to a 13.2% decrease in Canadian student enrolment, softened by a 70% increase in the number of international students. International students accounted for 15.9% of all university students in the 2015/2016 academic year in the Atlantic region, up from 8.8% ten years earlier. Across Canada, international students accounted for 12.9% of university enrollment during the 2015/2016 academic year, up from 7.7% 10 years earlier. Current growth opportunities in Atlantic Universities are strongly tied to attracting more international students.¹¹ In contrast, the demand for community college training has shown robust growth. Enrolment climbed 19% over the same ten year timeframe, and the enrolment increase was due to a greater number of Canadian students.

In 2015, Atlantic Canadian universities graduated 2,406 students from education programs. However, it is unclear how many of these graduates found work in Atlantic Canada. Historically, the number of graduates has been variable, falling to a low of 1,488 in 1998 before rebounding to 3,255 in 2011 and then falling off in each of the next four years.¹²

EXPECTED OUTLOOK

Employment in the educational services sector in Atlantic Canada is expected to grow by 0.4% annually during the 2018-2020 forecast period, which is above the 0.2% growth projected for all industries in the Atlantic region. The highest average annual growth rate in the region is expected to be in New Brunswick (1.0%) followed by Nova Scotia (0.6%). Slightly slower employment growth of 0.3% annually in the education sector is expected for

⁶ CANSIM Table 14-10-0023

⁷ CANSIM Table 14-10-0023

⁸ CANSIM Table 37-10-0007

⁹ CANSIM Table 17-10-0005 and Projections from Table 17-10-0057medium scenario

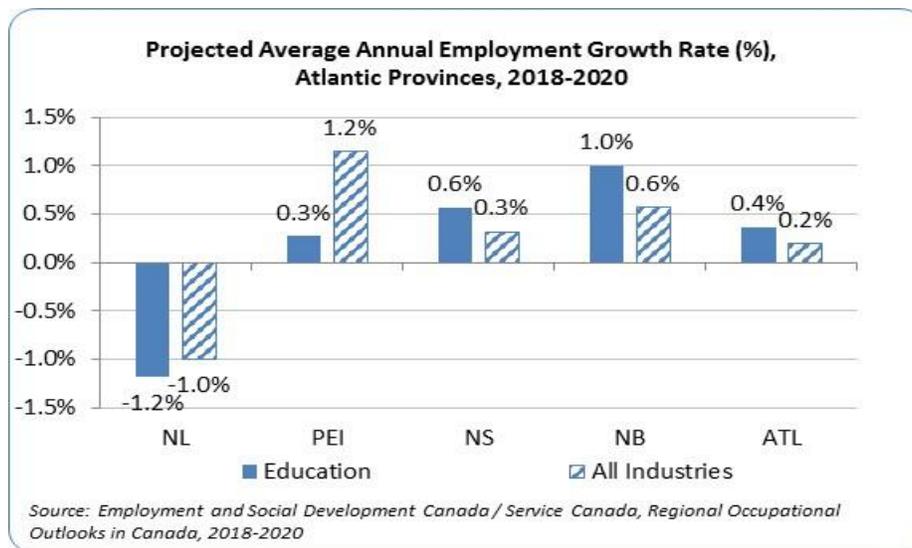
¹⁰ CANSIM Table 37-10-0008, 37-10-0012

¹¹ CANSIM Table 37-10-0018

¹² CANSIM Table 37-10-0020

Prince Edward Island, while Newfoundland and Labrador should experience diminishing employment reflected in a negative average annual growth rate of -1.2%.

Almost all of the growth in educational services employment from 2018 to 2020 will be concentrated in New Brunswick and Nova Scotia, which are expected to account for 97% of the net change in employment in the Atlantic sector. Prince Edward Island should make up the remaining 3% while Newfoundland and Labrador will experience a decline. In Nova Scotia and New Brunswick, educational services are expected to account for 14.5% and 13.1% of new job growth across all industries in their respective provinces over the 2018 to 2020 forecast period.



A declining school-age population and fiscal pressures at the provincial level contribute to the soft employment outlook in the sub-sector. Increasing international enrolments in post-secondary education as well as a federal focus on promoting apprenticeship programs are factors that may contribute to growth in employment in Community colleges and C.E.G.E.P.s.

SUB-REGIONAL DYNAMICS

Newfoundland and Labrador

- Between 2013 and 2017, educational services as a proportion of GDP was consistently lowest in Newfoundland and Labrador (4.8% in 2017).
- Newfoundland and Labrador has seen employment in the sector decline since 2007. Educational services employment is lower by 10.1% in 2017.
- Enrolment in elementary and secondary schools in the province has declined between the 2005/2006 and 2015/2016 school-years by 13.2%.

Prince Edward Island

- Of those employed in the educational services sector in Atlantic Canada, Prince Edward Island comprises 6.4%. Between 2007 and 2017 however, educational services employment rose by 15.2%, the highest growth rate of the four Atlantic provinces.
- Prince Edward Island has also seen the largest rate of growth in educational services expenditures both in real terms and as a proportion of GDP (1.9% average annual GDP growth between 2007 and 2017).¹³
- Enrolment in elementary and secondary schools declined in all four Atlantic Provinces between the 2005/2006 and 2015/2016 school-years. During this 10-year timeframe, Prince Edward Island experienced an enrolment decline of 10.2%.¹⁴ The Island was however, the only Atlantic province to see university enrolment rise (+8.7%) over these 10 years. College enrolment was also higher over this ten-year period but the Island was the only Atlantic province to see a decline in the recent 2015/16 academic year.

Nova Scotia

- Nova Scotia employs the greatest share of employment in the educational services sector in Atlantic Canada (43.8%). Educational services employment in the province expanded by just 1.1% between the years 2007 to 2017.
- Nova Scotia has seen the largest decline in elementary and secondary school enrolment (-16.8%) of the four Atlantic Provinces between the 2005/2006 and 2015/2016 school-years.
- College enrolment in Nova Scotia, however, has risen by 46% since 2005/2006, by far the greatest increase in Atlantic Canada; 3,687 more students in the 2015/2016 academic year. University enrolment was down slightly by 0.4% from 2005/2006. The number of Canadian university students in every Atlantic province has declined while the number of international students has risen dramatically from a 31% increase in New Brunswick to 189% in Prince Edward Island over a ten-year period.
- In Nova Scotia, universities accounted for 46% of the educational services GDP in 2017, seven percentage points more than any of the other Atlantic Provinces, which is indicative of the high number of universities and large post-secondary student population.¹⁵

New Brunswick

- New Brunswick has seen employment in the sector decline since 2007. Educational services employment is lower in 2017 by 1.1%.¹⁶
- Elementary and secondary school enrolment declined by 14.7% between the 2005/2006 and 2015/2016 school-years.¹⁷ The province has also seen university enrolments fall by 2.3% each year on average since the 2005/06 academic year.

¹³ CANSIM Table 36-10-0402

¹⁴ CANSIM Table 37-10-0007

¹⁵ CANSIM Table 36-10-0402

¹⁶ CANSIM Table 14-10-0028

¹⁷ CANSIM Table 37-10-0007

- College enrolment in New Brunswick is 6.2% higher in 2015/2016 than it was in the 2005/2006 academic year. Enrolment growth peaked in 2010/2011 at 9,288, however. Since then it has fallen by more than 1,500 students in 2015/2016.

APPENDIX

Table Two Real GDP (2017) and Employment (2017) for Atlantic Canada						
	Education			All Industries		
	Number	Share of Total	AAGR*	Number	Share of Total	AAGR*
Real GDP (M\$)	\$6,328.9	100.0%	0.9%	\$103,262.4	100.0%	0.4%
Newfoundland and Labrador	\$1,621.7	25.6%	0.5%	\$31,585.2	30.6%	-0.3%
Prince Edward Island	\$406.4	6.4%	1.9%	\$5,540.0	5.4%	1.5%
Nova Scotia	\$2,465.7	39.0%	1.2%	\$35,955.4	34.8%	0.8%
New Brunswick	\$1,835.1	29.0%	0.6%	\$30,181.8	29.2%	0.4%
Employment (000s)	83.2	100.0%	-0.1%	1099.8	100.0%	0.1%
Male	28.7	34.5%	-0.3%	550.8	50.1%	-0.1%
Female	54.4	65.4%	0.0%	549.0	49.9%	0.2%
15-24 years old	5.3	6.4%	-0.9%	140.3	12.8%	-1.5%
25-54 years old	59.3	71.3%	-1.1%	706.1	64.2%	-0.7%
55 years and older	18.5	22.2%	4.2%	253.4	23.0%	4.3%
Worked full-time	67.3	80.9%	0.5%	918.9	83.6%	0.1%
Worked part-time	15.9	19.1%	-2.2%	180.9	16.4%	-0.1%
Self-employed	3.0	3.6%	3.6%	131.5	12.0%	0.0%
Employees	80.1	96.3%	-0.2%	968.3	88.0%	0.1%
Permanent job	58.1	69.8%	-0.2%	788.2	71.7%	0.2%
Temporary job	22.0	26.4%	-0.3%	180.1	16.4%	-0.2%
Less than high school	2.2	2.6%	-5.3%	103.3	9.4%	-4.4%
High school graduate	9.9	11.9%	-2.0%	286.2	26.0%	-0.8%
Postsecondary cert. or diploma	17.2	20.7%	-0.9%	430.5	39.1%	0.5%
University degree	53.8	64.7%	0.9%	279.8	25.4%	3.0%
Newfoundland and Labrador	15.2	18.3%	-1.1%	224.1	20.4%	0.3%
Prince Edward Island	5.3	6.4%	1.4%	73.7	6.7%	0.7%
Nova Scotia	36.4	43.8%	0.1%	449.0	40.8%	0.0%
New Brunswick	26.2	31.5%	-0.1%	352.9	32.1%	-0.1%

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 2008-17 and Employment 2008-17)

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.

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