



Sectoral Profile

Educational Services

Ontario Region

2017–2019



Sectoral Profiles provide an overview of recent labour market developments and outlooks for some of the key industries in various regions of the country.

DECLINING ENROLMENT RAISES VARIOUS ISSUES FOR ONTARIO EDUCATIONAL SERVICES

- The Ontario birth rate has been declining throughout the decade, while the number of teenagers aged 14 to 18 years is projected to continue to decline, affecting secondary school and post-secondary enrolment
- Employment among elementary and secondary school teachers increased in 2016, the only sub-industry to do so within educational services
- The 2017/18 academic year for the Ontario college system was interrupted by a strike over the future of the academic staff, raising a number of issues
- Employment in the Ontario educational services industry is expected to remain flat over the 2017 to 2019 medium-term forecast period

The Ontario educational services industry employed 502,800 people in 2016, a decrease of 2.3% (-12,100) from the previous year.¹ This decrease in employment in 2016 represented the largest decline among all industries in Ontario for the year. However, employment growth in Ontario education has been moderately strong over the past half-decade, as employment grew by an annual average of 2.0% over the period, compared to the overall provincial labour market's growth of 1.1%.

Looking forward over the 2017 to 2019 period, employment is expected to remain relatively flat over the forecast horizon, mainly due to the continued decline in student enrolments. In 2016, 23.9% of all positions in the Ontario education industry were temporary, seasonal, casual, term, or on contract, versus 12.6% for all industries.² This ratio of temporary employment compared to permanent employment for the educational services industry was the highest among all industries in Ontario in 2016.

The educational services industry is made up of seven sub-industries in total, although for this report's purposes, the industry is composed primarily of four sub-industries: 1) primary and secondary schools, which account for about 60% of the industry's total workforce in Ontario in 2016; 2) universities (20%); 3) post-

secondary community colleges and C.E.G.E.P.s (7%); and 4) other educational services (12%), which includes business schools, technical and trade schools, educational support services, and other schools.³⁴

More than half of all employment in the educational services industry is found in the following occupations:

- Elementary school and kindergarten teachers (NOC 4032);
- Secondary school teachers (NOC 4031);
- Elementary and secondary school teacher assistants (NOC 4413);
- Post-secondary teaching and research assistants (NOC 4012); and
- University professors and lecturers (NOC 4011).

Employment among elementary and secondary school teachers expanded in 2016

The decline in employment in the Ontario educational services industry as a whole in 2016 serves as a warning to the large number of graduates from teacher's colleges in Ontario who cannot find work, although employment in the primary and secondary sub-industry did grow by 1.3% in 2016.⁵ In 2013, 72% of new graduates from teacher's colleges were unemployed or underemployed in their first year,⁶ although this number has gradually improved, remaining at an elevated level of 48% of new graduates as of 2016.⁷

In terms of student enrolments, there were 1,993,430 kindergarten, elementary and secondary students in non-private schools in Ontario in 2015/16, a 0.5% decrease from the previous year. This was the first time in over two decades that the number of enrolments dipped below 2 million students, with enrolments having decreased every year in Ontario since 2002/03.⁸

The continued decrease in enrolments reflects the demographics of Ontario, as the birth rate continues to fall, from 1.09% of the provincial population in 2008 to 1.03% in 2016,⁹ and the percentage share of younger persons in the population shrinks. This shift will impact the demand for educational services over the medium-term forecast period, particularly for secondary school teachers. Between 2017 and 2019, the Ontario population aged 14 to 18 is projected to decrease by 0.4%, a trend that will extend beyond 2020,^{10,11} and may result in school boards observing reduced demand for secondary school teachers. However, the aging population translates into a higher share of current teachers reaching retirement age, which could result in employment opportunities through attrition.

As of 2015/16, there were 3,978 elementary and 913 secondary schools in the province, with a slight increase in elementary schools and a small decrease in secondary schools from the previous year. Within these schools, there were 123,580 full-time teachers in Ontario in 2015/16, with 81,240 elementary and 42,340 secondary school teachers, a decrease of 6.2% from the previous year.

In response to the oversupply of teachers in the market that became fully saturated by around 2013, the provincial government changed the academic framework for teacher's colleges in Ontario, effective as of 2015, by moving from a two semester program to a four semester program, which helped reduce the number of annual applicants from about 9,000 in 2014 to approximately 4,500 by 2015.¹²

With the heightened requirements for qualifying for a teacher's license in Ontario, the number of new teacher's license granted annually has dropped from an average of about 10,000 between 2008 to 2014 to

about 5,000 on average from 2016 onwards, with the transition year of 2015 witnessing a dramatic one-time increase to 12,400 due to a large number of applicants wishing to obtain their license before the requirements were elevated.¹³

The province has set aside \$26.5 billion for education spending for 2017/18 in the 2017 provincial budget, with education expenses expected to grow by an annual average of 2.8% from 2015/16 to 2019/20.¹⁴ In addition, the province has planned for \$2.7 billion worth of investment in education infrastructure projects for 2017/18, an increase from \$2.0 billion in 2016/17,¹⁵ with \$1.4 billion earmarked for repairs and renewal,¹⁶ and with more than 50 new and renovated schools that opened in fall 2017.¹⁷

Pace of growth in university enrolments has been slowing

There were 484,060 undergraduate and graduate students enrolled in universities in Ontario in 2016/17, an increase of 2.1% from 2015/16.^{18,19,20} The pace of growth in enrolments had been steadily declining for Ontario universities for a number of years, between 2008/09 and 2015/16, negatively impacting university budgets, although the increase in enrolment in 2016/17 was the sharpest growth in these figures since 2010/11.

The share of international students enrolled in Ontario universities has been increasing steadily among university students, rising from 8.3% in 2011/12 to 13.0% of total student enrolment in Ontario universities.²¹ The number of international students enrolled in Ontario universities reached 58,410 in 2016/17.

The number of people employed in the Ontario university sub-industry declined by 4.9% from 2015 to 2016, its first decrease since 2013, after increasing by 7.9% in 2015.²² According to Statistics Canada, there was 16,020 full-time teaching staff in Ontario universities in the 2016/17 academic year, including 5,270 full professors, 6,310 associate professors, and 3,030 assistant professors.²³ The number of full-time teaching staff in Ontario universities has hovered around 16,000 since 2008/09.

To help support university students, the Ontario government has loosened its repayment provisions for the Ontario Student Assistance Program (OSAP) in the 2017 provincial budget,^{24,25} which is allowing more than one-third of all full-time college and university students in Ontario to receive free tuition,²⁶ while the province created the Ontario Student Grant in the 2016 Budget.²⁷

Community colleges undergoing a challenging period of negotiations

The community colleges sub-industry includes agriculture schools, C.E.G.E.P.s, community colleges, teachers' colleges, and technical institutes. Employment in the community colleges/post-secondary sub-industry decreased by 17.3% in 2016, after increasing 8.7% in 2015 and 21.7% in 2014.²⁸

There were more than 500,000 students enrolled in Ontario colleges in 2014/15, with about 225,660 registered as full-time students,^{29,30} which includes 34,120 students registered as international students. Approximately 58% of entrants for the 2014/15 school year into the Ontario post-secondary system attended a college, compared to 42% attending a university.³¹ There were 196,090 applicants into the college system for 2015/16.

Colleges in Ontario collectively employed 45,810 people as of 2015/16, with 17,780 (38.8%) of these individuals employed full-time, and 28,030 (61.2%) employed part-time.^{32,33} Among the staff, 22,890 (50.0%) were employed as academic staff, 20,090 (43.9%) as support staff, and 2,825 (6.2%) as administrative staff. The full-time college staff for each of the three categories has generally grown steadily throughout the last 15 years, although the number of full-time academic and support staff have flattened in recent years. Among all academic staff in Ontario colleges, 7,490 (32.7%) of academic staff were employed full-time, while 15,400 (67.3%) were employed part-time in 2015/16.

The 2017/18 Ontario college academic year was disrupted by a strike that began on October 16, 2017 by approximately 12,225 faculty from all 24 colleges in Ontario, organized under the Ontario Public Service Employees Union (OPSEU)'s college academic unit, whose collective agreement with the College Employer Council of Ontario had expired on September 30, 2017.³⁴

The strike ended as back-to-work legislation was passed by the Ontario government on November 19, 2017, where all outstanding issues, including wage increases,^{35,36} the issue of the full-time vs. part-time³⁷ and permanent vs. temporary academic staff ratios,³⁸ as well as academic freedom and the exclusive control of the curriculum taught in the classrooms,³⁹ were referred to binding mediation-arbitration, while the colleges were also instructed to establish a dedicated fund to support students who suffered financially as a direct result of the strike.^{40,41}

Federal and Provincial governments continue to support advancement in the trades,^{42,43} as well as retraining and skills development. In particular, the province is investing nearly \$190 million from 2017 to 2020 in various programs. The Career Kick-Start Strategy is focused on creating 40,000 new work-related learning opportunities for students of all ages. Also, the expansion of the Specialist High Skills Major Program allows Grade 11 and 12 students to explore career options during their education. Finally, the newly established Career Ready Fund supports colleges and universities in expanding career-oriented programs.⁴⁴ These investments will help support the numerous colleges in the province offering apprenticeship programs, with colleges delivering 85% of the in-school apprenticeship training in Ontario in 2014/15.⁴⁵

Employment in other educational services expected to continue along growth path

The other schools and instruction sub-industry is comprised of establishments who provide a wide variety of courses including fine arts, athletic instruction, language schools, driver education, personal development courses, and private tutors. There are a multitude of indicators driving employment in the subsector. As many teachers' college graduates find it difficult to find full-time employment in elementary and secondary schools, they may find employment in other educational services occupations.

For the purposes of this report, other major educational services sub-industries, such as business schools, computer and management training, technical and trade schools, and educational support services, are grouped together with the other schools and instruction sub-industry and classified as other educational services. Employment in the Ontario other educational services sub-industry decreased by 4.8%, its first decrease since 2008.⁴⁶ Overall, the sub-industry has shown strong growth for a decade, and employment has increased by 31.6% over the last 5 years, a much sharper increase compared to other education sub-industries.

Indeed, there has been a steady rise in the number of academic institutions offering courses and online accreditation, as well as distance education options.⁴⁷ Technology has been a driver for change in educational services in Ontario, and there are clear indications that education methods are being altered, as chalkboards are being supplemented with interactive white boards, text-to-speech software, classroom amplification systems, and other assistive technologies.⁴⁸ The Ontario Ministry of Education also has a specific active e-Learning Strategy, which provides Ontario school boards, schools and students with access to valuable software, digital libraries, online education communities, and digital reservation systems.⁴⁹

In addition, the provincial government has also entered a partnership with the Ontario Centres of Excellence to create a program called Advancing Education, bringing more innovative technology into classrooms, through projects that will include more multisensory tools, game-based approaches and innovative methods to distance education.⁵⁰ The advent of rapid technological updates to the education industry has required educators to develop skills in using new technology and approaches in order to instruct students.⁵¹ In addition, as schools and universities increase their data systems and technology requirements, technical occupations in computer and information systems will continue to carry greater importance in the education sector.

Focus on Indigenous education helping create new openings

The province's Indigenous Education Strategy is its commitment framework for First Nation, Metis and Inuit students. The strategy includes having all school boards in Ontario having Indigenous Education Leads⁵² that are designated to support the implementation of the Strategy, which is developed in collaboration with First Nation, Metis and Inuit parents and organizations.⁵³

The province is also moving to recognize Indigenous institutes in the Ontario postsecondary education system as a unique pillar that will be overseen by Indigenous educators,⁵⁴ while investing \$56 million into these institutes over 2017 to 2020.⁵⁵ In addition, school boards in Ontario received \$64 million from the provincial government in the 2016/17 school year to support Indigenous education.⁵⁶

Sector Outlook

The educational services industry is expected to remain relatively flat and grow by on average 0.1% per year over the forecast period. Employment growth in the industry will be slightly hampered by Ontario's demographic changes, particularly the sustained and gradual decline in the provincial birth rate and enrolment in elementary and secondary students, but growth in the industry will be boosted by the continued market demand for skilled graduates into the post-secondary system and the workforce. The Ontario post-secondary system is now grappling with some of the similar issues that the elementary and secondary school sub-industry has been dealing with over the long-term. As the education system transforms towards a more technologically-savvy, internet-based system, employment opportunities will continue to improve for those who adapt quickly to take advantage of the new technology.

Sub-provincial trends

Employment in educational services in the **Ottawa, Kingston-Pembroke, Toronto, Kitchener-Waterloo-Barrie and Hamilton-Niagara Peninsula** economic regions has grown steadily over the last five years, with Ottawa and

Kingston-Pembroke showing increases of over 25% from 2011 to 2016. These economic regions often lead employment growth in the province, while these areas also have high concentrations of educational institutions, including universities, colleges, and alternative education schools.

Despite the strong growths in these regions, there were some closures and layoffs in these regions over 2017, with Laurentian University announcing that it will be closing its Barrie campus in 2019,⁵⁷ and Georgian College eliminating seven full-time administrative positions in 2017.⁵⁸ In addition, the Ottawa-Carleton District School Board closed six elementary schools in 2017 due to funding cuts.⁵⁹ However, in a boost to its elementary and secondary schools, the Toronto District School Board has dropped a proposal it was considering to phase out specialized schools, after an outcry from parents and students.⁶⁰ As well, the Waterloo Region School Board,⁶¹ the Hamilton-Wentworth District School Board,⁶² the Upper Grand District School Board,⁶³ and the Bluewater District School Board⁶⁴ all hired more teachers than they had planned for the 2017/18 academic year. Ontario has also invested in a new York University campus in Markham, that will serve as the first university campus in the York Region.⁶⁵ Looking forward, these regions are expected to perform strongly relative to other economic regions in Ontario based on their relatively younger age profile and stronger population growth.⁶⁶

More rural regions such as the **Muskoka-Kawarthas and Stratford-Bruce Peninsula** economic regions tend to experience lower employment growth in educational services, with employment in Muskoka-Kawarthas decreasing by 21.5% from 2011 to 2016,⁶⁷ due to their slower expanding and older populations. Due partly to the composition of the population, there are fewer colleges, universities and education centres in these economic regions compared to more urban regions, decreasing opportunities for employment in the area. For the 2017-2019 period, educational services employment is expected to decline in these regions. The **London and Windsor-Sarnia** economic regions, while more urban in nature, have experienced modest employment declines in their regional educational services industry employment over the 2011-2016 period. However, in a positive note, the Greater Essex County District School Board hired 35 elementary school teachers and 19 secondary school teachers in summer 2017 due to a rise in enrolment,⁶⁸ with the board also adding almost 50 names to its long-term occasional teaching list, while the Lambton Kent District School Board hired 51 elementary and secondary teachers for the 2017/18 school year.⁶⁹

In Northern Ontario, despite declining enrollments due to slow population growth,⁷⁰ the need for teachers persists in some remote areas. The goal to retain teachers in remote areas and on reserves in Ontario's North is also part of the provincial government's economic plan.⁷¹ The Ontario government is investing \$300 million in school repairs across Northern Ontario,⁷² with the District School Board Ontario North East reviewing a list of more than \$18 million in capital improvements for the 2017/18 school year,⁷³ attracting students to Northern Ontario college campuses,⁷⁴ and the development of programs and facilities at northern colleges, such as Confederation College in Thunder Bay.⁷⁵ With the increased educational funding in the northern regions, schools have been adding staff, with the Keewatin-Patricia District School Board hiring teachers, caretakers, librarians and administrative assistants.⁷⁶ Regional demographic changes mean that some universities, particularly in the north, are facing declining enrolment. The resulting financial pressures on these universities will be exacerbated by the failure to account for province-wide enrolment growth in provincial operating grant allocations because less total funding will be available for distribution through the system.⁷⁷ Going forward, overall employment in educational services in the **Northeast** and **Northwest** economic regions is likely to decline due to stagnant population growth.⁷⁸

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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¹ Statistics Canada, Labour Force Survey, CANSIM Table 282-0008

² Statistics Canada, Labour Force Survey, CANSIM Table 282-0080

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⁹ Statistics Canada, CANSIM Tables 102-4505, 051-0013, 051-0004, 051-0001

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²³ Statistics Canada, CANSIM Table 477-0017

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³⁰ <https://www.ontario.ca/data/university-enrolment>

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³² http://www.collegesontario.org/research/2016_Environmental_Scan/CO_EnvScan_2016_RESOURCES_WEB_REV.pdf, p. 10

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