



2019 SECTOR SPOTLIGHT

EDUCATIONAL SERVICES



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Educational services

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Note on geography: This report looks at data for the Ottawa Census subdivision. Census subdivision (CSD) is the general term for municipalities (as determined by provincial/territorial legislation).

What is this industry sector?

STATISTICS CANADA DEFINITION



This sector comprises establishments primarily engaged in providing instruction and training in a wide variety of subjects. This instruction and training is provided by specialized establishments, such as schools, colleges, universities and training centres. These establishments may be privately owned and operated, either for profit or not, or they may be publicly owned and operated. They may also offer food and accommodation services to their students.

Educational services are usually delivered by teachers who explain, tell, demonstrate, supervise and direct self-learning. Instruction is imparted in diverse settings, such as educational institutions, the workplace or the home (through correspondence, television or other means). The lessons can be adapted to the particular needs of the students, for example sign language can replace verbal language for teaching students with hearing impairments. All industries in the sector share this commonality of process, namely, labour inputs of teachers with the requisite subject matter expertise and teaching ability.

SECTOR STRUCTURE

Below we show this sector's **two subsectors** (3-digit level), as well as the *4-digit level Industry Groups* that will be explored in this report to provide more meaningful information.

SUBSECTORS

- 611 – Educational services

How does this sector stack up in Ottawa?

OTTAWA DASHBOARD

The graphic below ranks Ottawa's Top 13 sectors (based on # of jobs in 2018) and shows how *Educational services (NAICS 61)* stacks up against the other sectors on a dashboard highlighting key local labour market information (LMI).

#5	#2	#3	#8	#9	#11	#12	#4	#3	#9	#2
2018 Jobs	5 Year Job Gains	Share of Jobs	Annual Salary*	Self-Employed	Business Count	Employer Count	Job Ads	Job Profiles	Unemployment Rate	Unionization Rate*
121,863	8,368	3.14	\$85,642	30%	18,176	5,912	6,033	5,147	2%	73%
68,509	6,737	1.37	\$83,123	24%	9,220	3,454	4,988	3,577	3%	65%
61,460	5,585	1.09	\$75,581	17%	7,344	3,325	3,409	3,136	3%	47%
60,578	5,220	1.05	\$65,470	16%	6,341	2,735	2,739	1,559	4%	46%
48,754	4,815	1.05	\$64,524	14%	5,798	2,699	2,430	1,296	4%	29%
40,516	3,787	0.93	\$63,435	13%	5,490	2,104	1,923	1,288	4%	19%
35,442	2,898	0.89	\$59,329	13%	3,385	1,338	1,522	947	4%	19%
33,774	2,445	0.87	\$53,502	8%	2,972	966	828	812	5%	13%
29,662	1,658	0.78	\$49,311	7%	2,866	925	590	736	5%	12%
19,992	1,321	0.76	\$48,740	6%	1,644	677	590	514	7%	11%
19,846	38	0.70	\$45,544	5%	1,418	476	502	385	8%	10%
19,338	-86	0.59	\$30,430	4%	1,282	425	397	173	8%	7%
17,613	-572	0.37	\$21,255	0%	166	149	302	132	9%	0%
# of jobs (2018)	Increase in # of jobs over past 5 years (2013-2018)	National Location Quotient (1.00 = national norm)	Average annual salary in 2018 (*not including self-employed)	% of jobs that are self-employed	Incl. business without employees (Dec 2018)	Businesses with at least 1 employee (Dec 2018)	# of online job ads (2018)	# of job seeker profiles added or updated (2018)	% of labour force unemployed (2016)	% of sector jobs unionized in 2018 (*some sectors combined in CANSIM data)

Average annual salary in 2018* not including self-employed

Unionization Rate % of sector* jobs unionized in 2018 (*some sectors combined in CANSIM data)

TOP 10 OCCUPATIONS (# of 2018 jobs)	TOP 10 EMPLOYERS (# of postings in 2018)	TOP 10 EMPLOYERS (number of employees)
4030 Secondary and elementary school teachers and educational counsellors, n.e.c. (7,023)	1. University of Ottawa (718)	1. ABCE Language School Inc (430)
4032 Elementary school and kindergarten teachers (5,658)	2. Algonquin College of Applied Arts and Technology (363)	2. Ottawa Catholic School Board (301)
4012 Post-secondary teaching and research assistants (4,003)	3. Thales Canada (352)	3. Canadian Institute-Health Info (300)
4011 University professors and lecturers (3,551)	4. Carleton University (334)	4. Longfield-Davidson Heights (220)
4021 College and other vocational instructors (3,458)	5. The Royal Conservatory (193)	5. Interlangue Language School (160)
4031 Secondary school teachers (3,419)	6. Dell Training and Certification (60)	6. Sacred Heart High School (150)
4413 Elementary and secondary school teacher assistants (2,935)	7. Saint Paul University (57)	7. Conseil Des Ecoles Catholiques (150)
5254 Program leaders and instructors in recreation, sport and fitness (1,399)	8. Royal College of Physicians and Surgeons of Canada / RCPSC (51)	8. Earl Of March Secondary School (150)
0422 School principals and administrators of elementary and secondary education (1,054)	9. Natural Resources Extension Program (NREP) (34)	9. Emerald Links Golf & COUNTRY (150)
4214 Early childhood educators and assistants (861)	10. Metis Nation of Ontario (29)	10. Lester B Pearson High School (140)

Sector Employment (Jobs)

REGIONAL TRENDS (5-year Job Growth - Ottawa vs. Ontario vs. Canada)

Region	2013 Jobs	2018 Jobs	Change	% Change
● Ottawa	42,017	48,754	6,737	16.0%
● Ontario	476,745	534,362	57,617	12.1%
● Canada	1,265,129	1,395,811	130,682	10.3%

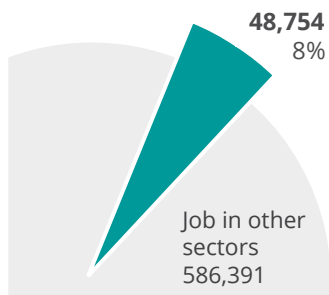
2018 EMPLOYMENT – A SUBSECTOR VIEW

#3

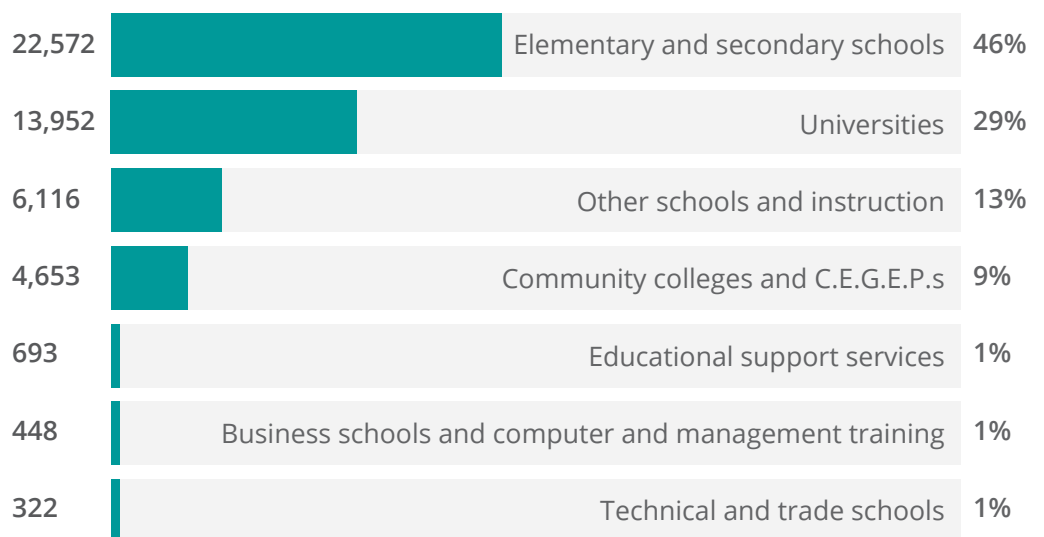
Ranked third out of 13 on # of specialization

46% of sector jobs are in **Elementary and secondary schools**

9% above the national average for **share of workers** in this industry



48,754 Sector Jobs in 2018 (8% of all Ottawa Jobs)

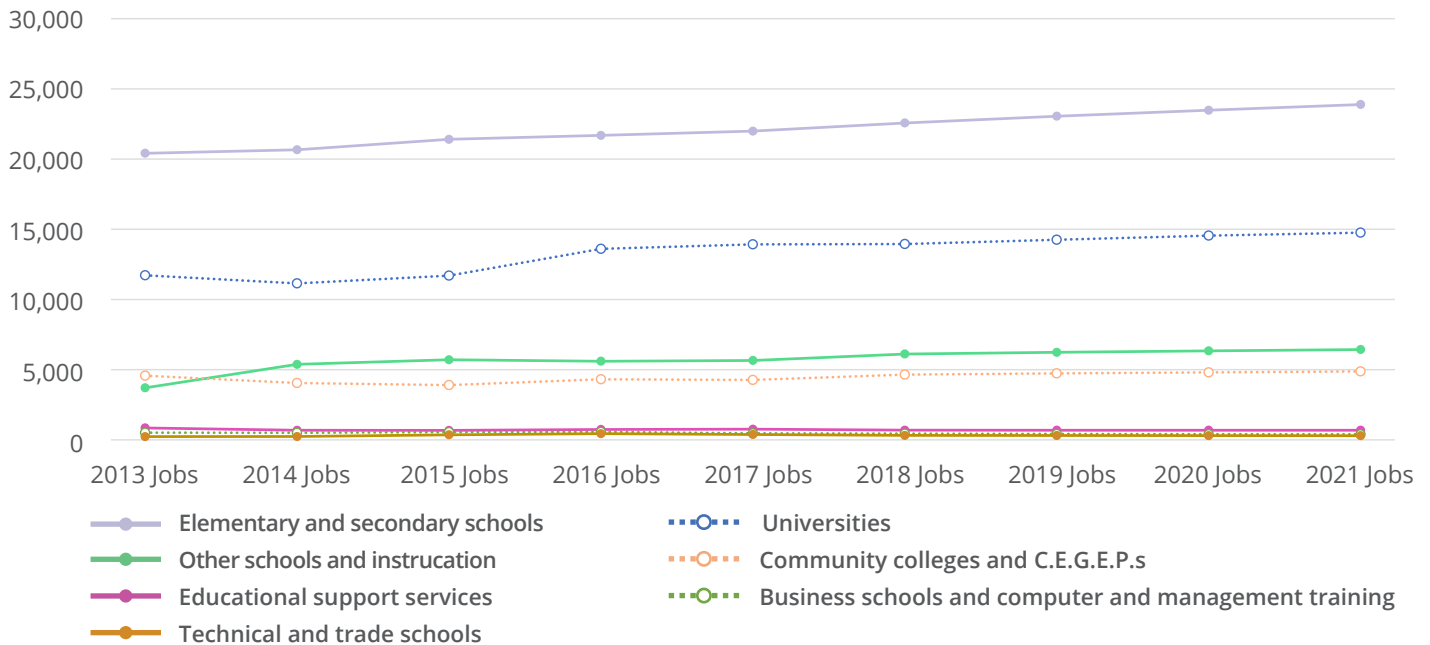


A closer look at specialization:

Ottawa's share of workers in Business schools and computer and management training is 74% greater than the Canadian average; Elementary and secondary schools and Technical and trade schools are the industry groups below the national average (8%, 26% below respectively).

Source: EMSI Analyst 2019

JOB NUMBERS BY INDUSTRY GROUP (Past 5 years and 3-year outlook)



Job numbers, growth rate and forecast number of new jobs*

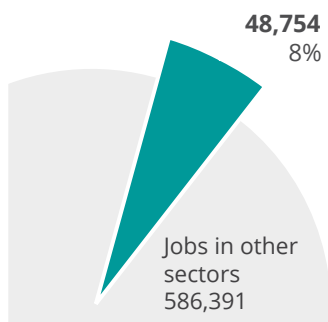
NAICS	Description	2013	2014	2015	2016	2017	2018	% Change (2013-2018)	Forecast change (2018-2021)
6111	Elementary and secondary schools	20,412	20,663	21,407	21,687	21,990	22,572	11%	1,315
6113	Universities	11,718	11,143	11,699	13,606	13,925	13,952	19%	804
6116	Other schools and instruction	3,713	5,383	5,709	5,605	5,656	6,116	65%	320
6112	Community colleges and C.E.G.E.P.s	4,570	4,056	3,905	4,315	4,273	4,653	2%	221
6117	Educational support services	853	687	679	744	763	693	-19%	-1
6114	Business schools and computer and management training	515	509	556	569	472	448	-13%	-51
6115	Technical and trade schools	235	243	362	446	385	322	37%	-22
SECTOR TOTAL		42,017	42,685	44,316	46,972	47,465	48,754	16%	2,587

Source: EMSI Analyst 2019 (*EMSI recommends taking occupation data below 500 jobs with "a grain of salt" because of source data sampling sizes; occupation data is not considered reliable where fewer than 100 jobs)

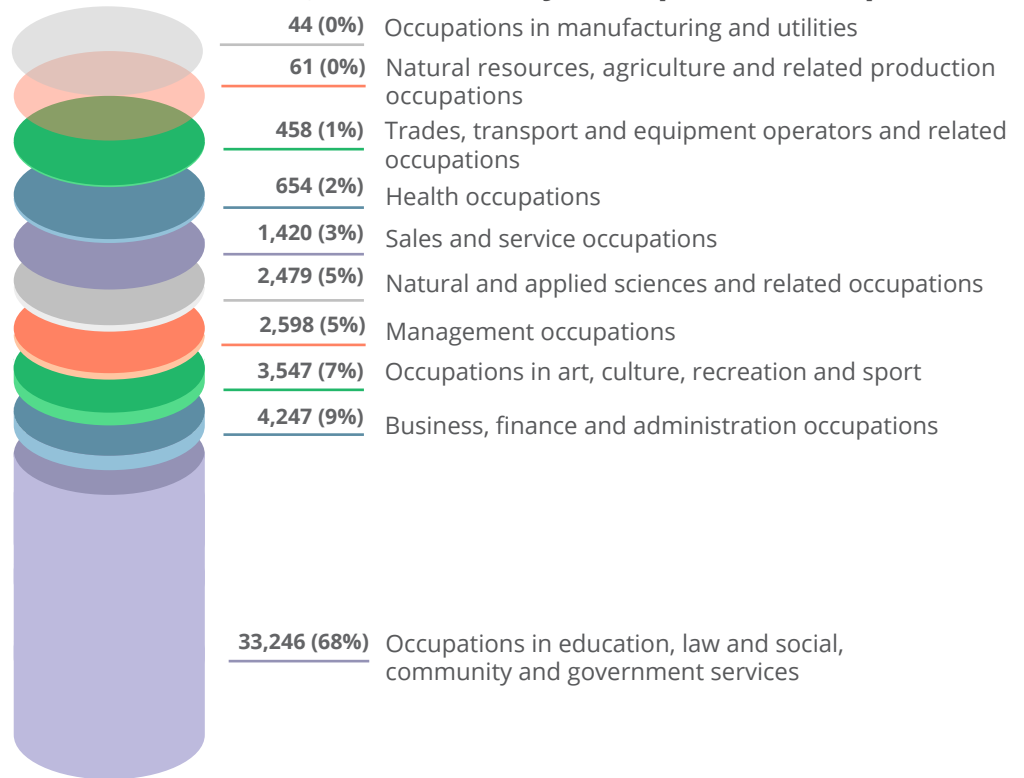
KEY OCCUPATIONS IN THE SECTOR

The job data shown thus far has focused on **number** of workers in your sector and its industry groups. Now we take a look at what these workers are doing by focusing on the **key occupations** in your sector.

Over two-thirds (68%) of sector jobs are Occupations in education, law and social, community and government services



Sector Jobs in 2018 by Occupation Group



Top Ten Occupations (Sector job numbers and growth over past five years)

NAICS	Description	Employed in Industry (2013)	Employed in Industry (2018)	Change (2013-2018)	% Change (2013 - 2018)	% of Total Industry Jobs (2018)
4030	Secondary and elementary school teachers and educational counsellors, n.e.c.	4,761	7,023	2,262	48%	14%
4032	Elementary school and kindergarten teachers	5,431	5,658	227	4%	12%
4012	Post-secondary teaching and research assistants	3,479	4,003	524	15%	8%
4011	University professors and lecturers	3,607	3,551	-56	-2%	7%
4021	College and other vocational instructors	2,788	3,458	670	24%	7%
4031	Secondary school teachers	3,239	3,419	180	6%	7%
4413	Elementary and secondary school teacher assistants	2,352	2,935	583	25%	6%
5254	Program leaders and instructors in recreation, sport and fitness	790	1,399	609	77%	3%
0422	School principals and administrators of elementary and secondary education	914	1,054	140	15%	2%
4214	Early childhood educators and assistants	1,032	861	-171	-17%	2%

Source: EMSI Analyst 2019

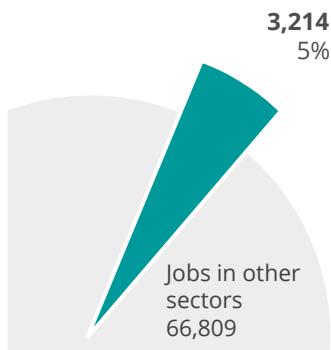
Sector Self-Employment (2018)

SECTOR AT A GLANCE

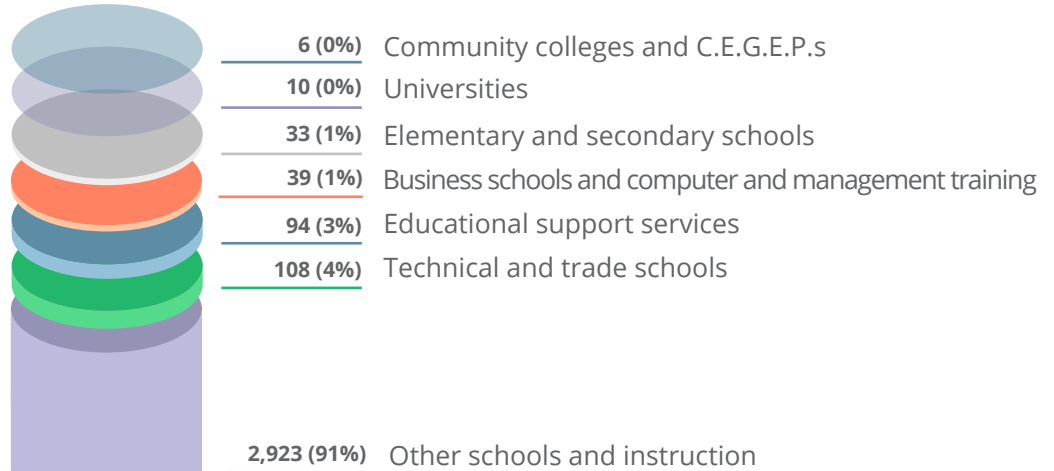
#6

Ranked **sixth** out of **13** on share of self-employed workers

91% of sector's self-employed workers are in **Other schools and instruction**



3,214 Sector Jobs in 2018 (5% of all Ottawa jobs)



A closer look at share of self-employment:
While just 7% of those working in this sector are self-employed, near 13% of all workers in Elementary and secondary schools are self-employed (see graph below).

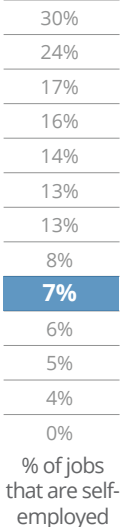
A CLOSER LOOK AT SHARE OF SELF-EMPLOYMENT

The chart below shows share of self-employment for the overall sector and for each industry group.

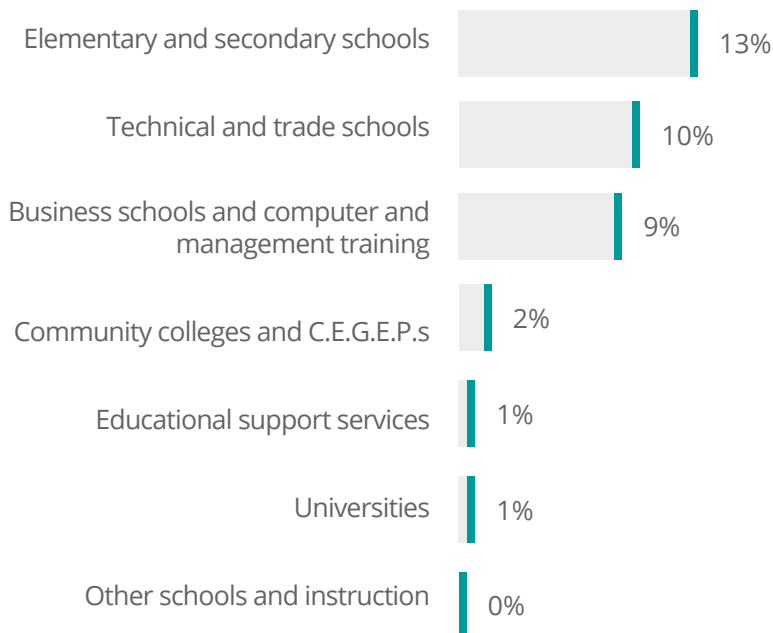
Sector Ranking

#9

Self-Employed



Share of workers self-employed in each industry group



Source: EMSI Analyst 2019

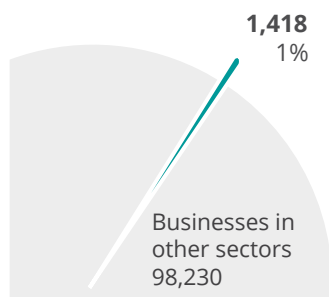
Sector Business & Employer Counts (December 2018)

SECTOR AT A GLANCE

#11 **#12**

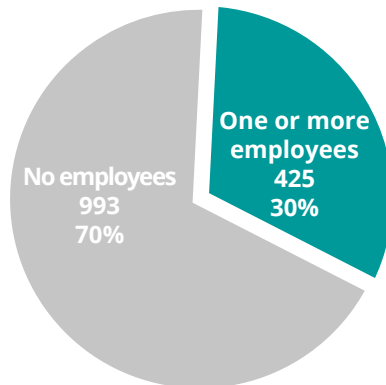
Ranked **eleventh** out of 13 on number of businesses and **twelfth** on number of employers

One-third of sector businesses have employees currently on payroll

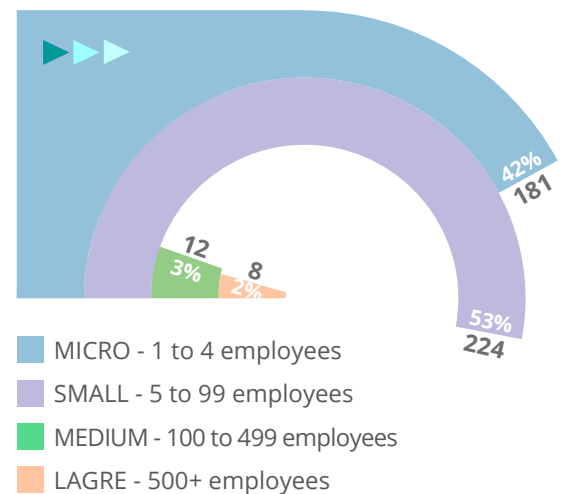


1,418 Ottawa Businesses (1% of all businesses)

SECTOR BUSINESSES



SECTOR EMPLOYERS



A closer look at employers:

Business counts include locations with no employees on payroll; employer counts only include locations with employees.

BUSINESS COUNTS AT INDUSTRY GROUP LEVEL

Code	Description	1-4	5-9	10-19	20-49	50-99	100-199	200-499	500+	None	Total
6116	Other schools and instruction	102	52	46	27	8	3	1	0	623	862
6114	Business schools and computer and management training	47	2	5	7	0	1	0	0	181	243
6117	Educational support services	15	2	9	4	1	1	0	0	134	166
6111	Elementary and secondary schools	6	15	11	11	5	3	0	5	21	77
6115	Technical and trade schools	8	1	6	5	0	0	0	0	21	41
6112	Community colleges and C.E.G.E.P.s	3	1	0	2	1	0	2	1	13	23
6113	Universities	0	1	0	1	1	0	1	2	0	6

Source: EMSI Analyst 2019

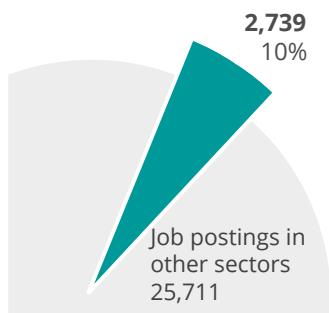
Online Supply & Demand (2018)

ONLINE JOB POSTINGS

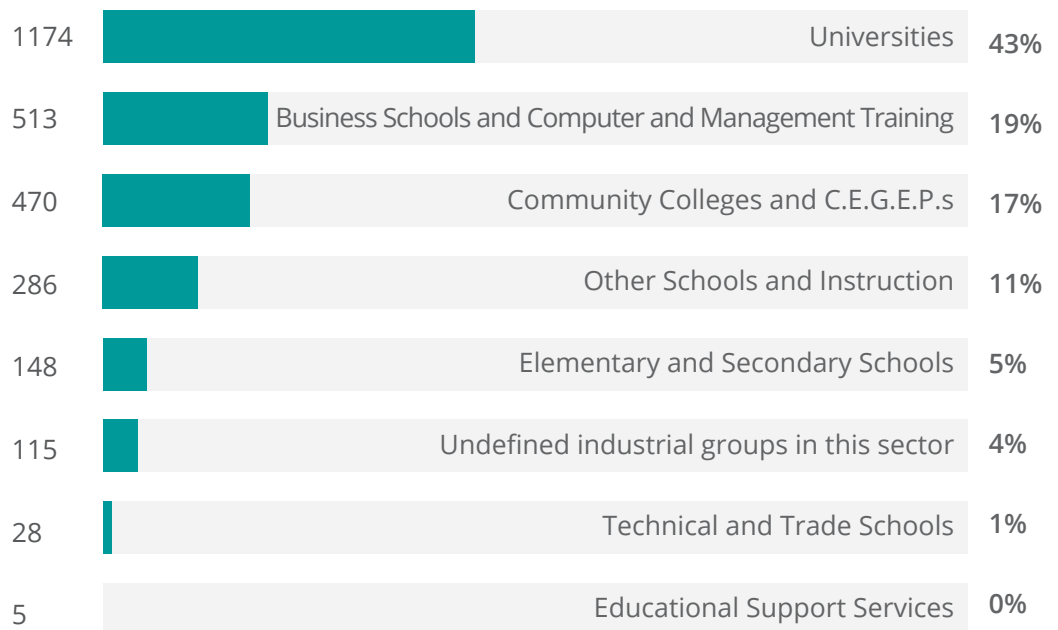
#4

Ranked **fourth** out of **13** on # of online job postings

Most ads posted by Universities (43%)



2,739 Ottawa postings (10% of total postings)

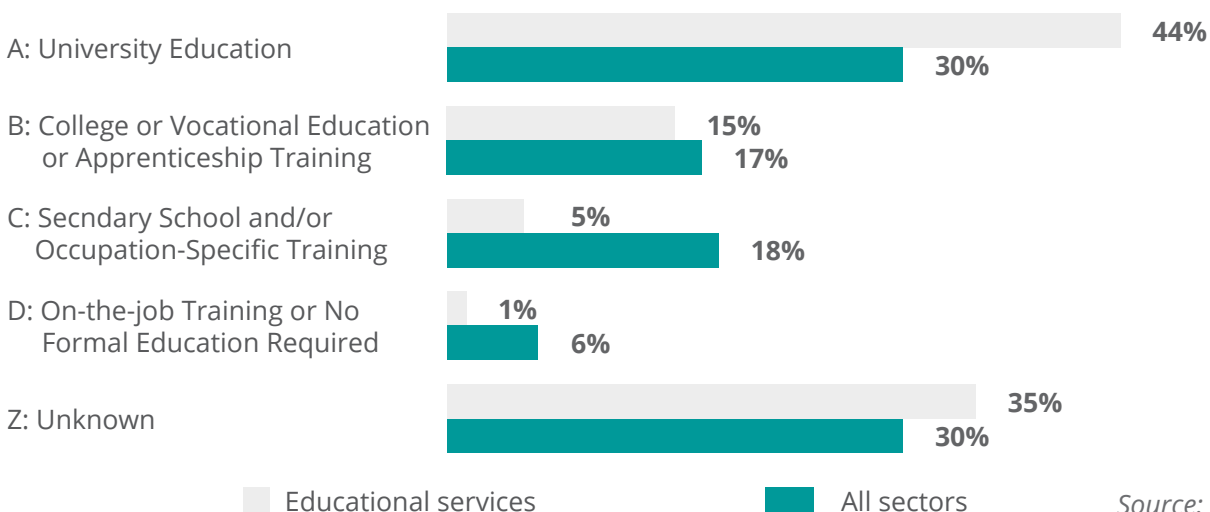


A closer look at skill level requirements:

Looking at the level of education required for jobs posted in this sector in Ottawa, we see that 44% require University education, versus 30% for job posting in all sectors (see graph below).

A Closer Look at Skill Level Required in Job Postings (Sector vs. Ottawa overall)

The chart below shows skill level requirements for jobs posted in this sector versus those posted for all Ottawa sectors.



Source: Vicinity Jobs 2018

Job Postings by Employer – Top TEN (identified Employers only)

Employers	Postings	Percentage
University of Ottawa	718	29%
Algonquin College of Applied Arts and Technology	363	15%
Thales Canada	352	14%
Carleton University	334	14%
The Royal Conservatory	193	8%
Dell Training and Certification	60	2%
Saint Paul University	57	2%
Royal College of Physicians and Surgeons of Canada / RCPSC	51	2%
Natural Resources Extension Program (NREP)	34	1%
Metis Nation of Ontario	29	1%
<i>Grand Total *</i>	2,217	-

* Number of Postings applicable to the reporting period but excluded from this report's grand total due to lack of reliable and relevant information: 265

Source: Vicinity Jobs 2018

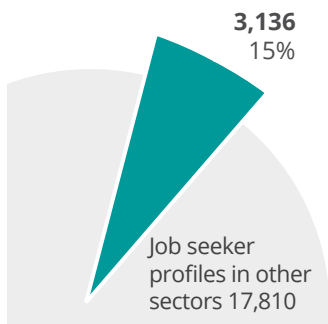
ONLINE JOB SEEKER PROFILES

The numbers shown reflect Job Profiles that were either added or updated within a 30-day span by job seekers living in Ottawa between January and December 2018.

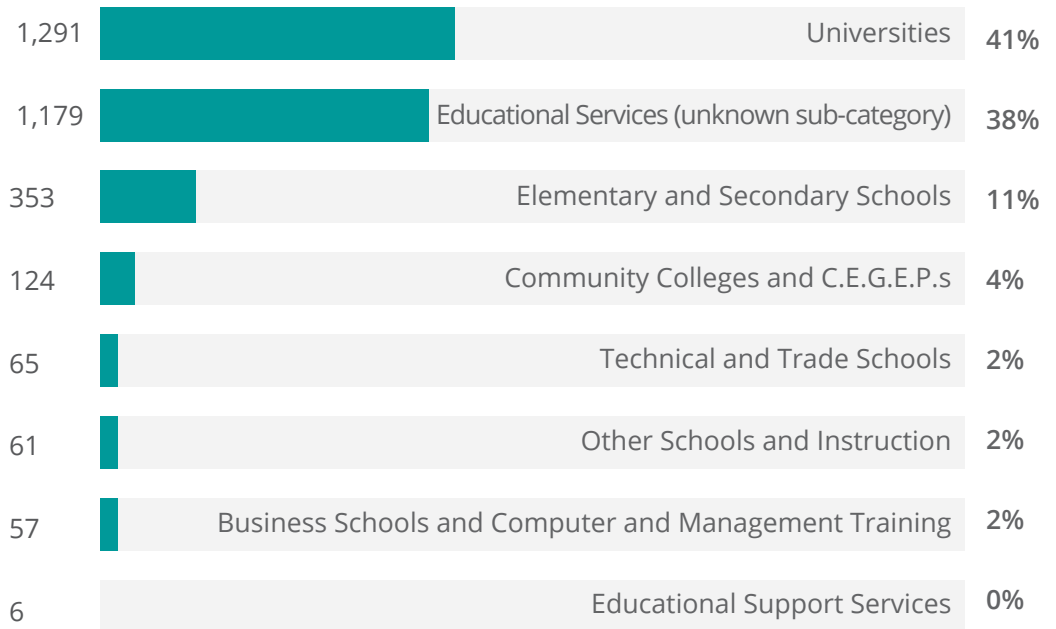
#3

Ranked **third** out of 13 on # of online job seeker profiles

Slightly over (40%) of profiles posted by job seekers with most recent experience in Universities



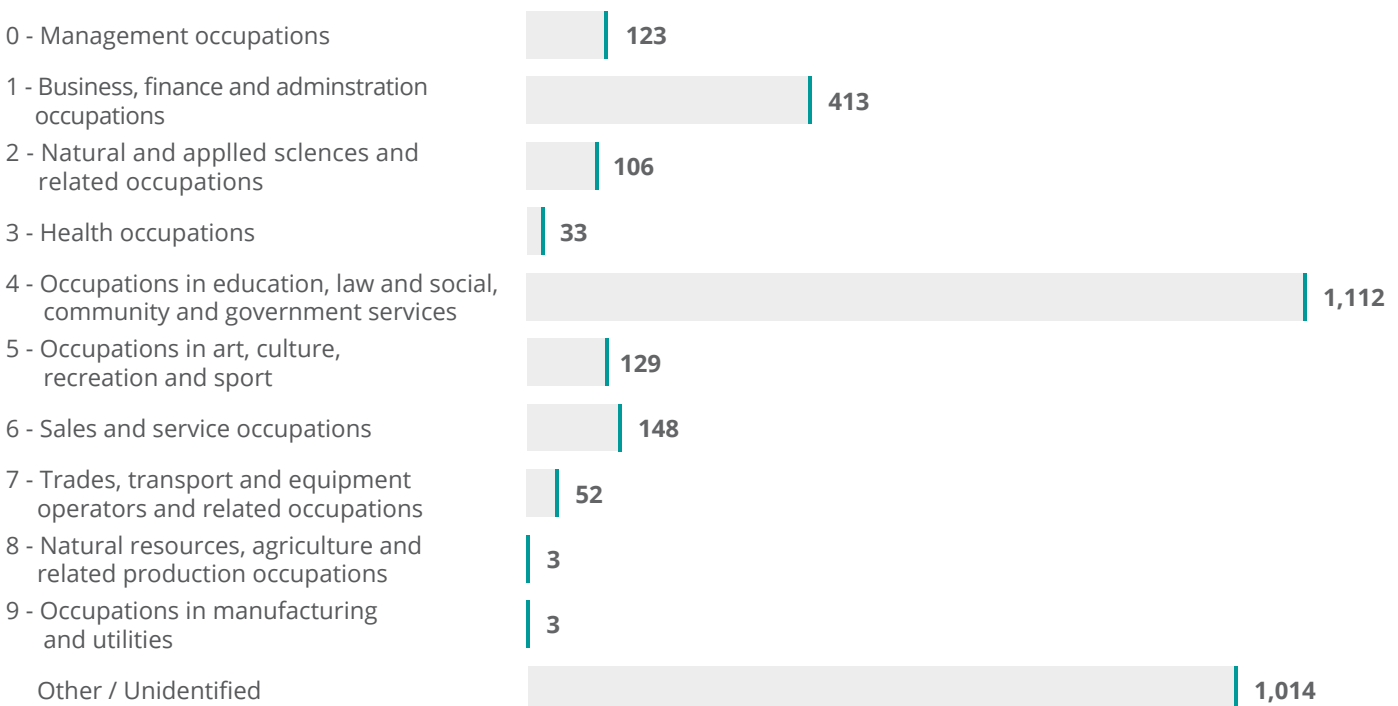
3,136 Ottawa profiles in 2018 (15% of total profiles)



A closer look at occupations for active job profiles:
Of those job profiles where occupation group could be identified, the most (1,112) were in Occupations in education, law and social, community and government services (see graph below).

A Closer Look at Occupations of those with Active Job Profiles

The chart below shows number of job seeker profiles by occupation group most recently worked in.



Source: Vicinity Jobs 2018

In the News Highlights

GAINS

June 24, 2019 Ottawa Citizen

[Upper Canada District Schoolboard to cut 160 jobs](#)

As part of a recurring trend in Ontario's education services sector, the Upper Canada District School Board has laid off 160 specialized staff, whose responsibilities include assisting students with mental health and behavioural issues. A lack of funding from the provincial government meant that \$11.7 M from the schoolboard's \$364.5 M budget had to be cut, necessitating the layoffs.

May 3, 2019 Global News

[Upper Canada District Schoolboard issues 104 layoff notices to teachers](#)

Amid education budget cuts by the Ontario PC government, the Upper Canada District Schoolboard issued 104 layoff notices to its secondary school teachers. With the schoolboard currently employing 650 of those teachers, the layoffs represent a loss of about one sixth of its working base.

April 7, 2019 Ottawa Citizen

[More than 300 teacher jobs at risk in Ottawa public schools due to provincial cuts to education](#)

Education cuts instituted by Ontario's new PC government have put around 250 to 300 secondary teaching jobs in the Ottawa-Carleton District Schoolboard at risk. The OCDSB, Ottawa's largest schoolboard, estimates that government plans to increase class sizes and cut certain programs will slash \$32 M from its \$1 B budget, creating a funding shortfall that will force the job losses.

APPENDIX A - SECTOR STRUCTURE

Below we show this sector's **two subsectors** (3-digit level), as well as the *4-digit level Industry Groups* that will be explored in this report.

SUBSECTOR NAICS 441 - Motor vehicle and parts dealers

<u>Code</u>	<u>Industry group</u>
6111	Elementary and secondary schools
6112	Community colleges and C.E.G.E.P.s
6113	Universities
6114	Business schools and computer and management training
6115	Technical and trade schools
6116	Other schools and instruction
6117	Educational support services

Emsi Sample Report – Industry Summaries

Below is a sample report that can be requested for any industry at the 3- or 4-digit (subsector or industry group) level. Some of these may also be available on the Labour Market Ottawa web portal.

Industry Summary for Grocery stores (NAICS 6111)

22,572

Jobs (2018)

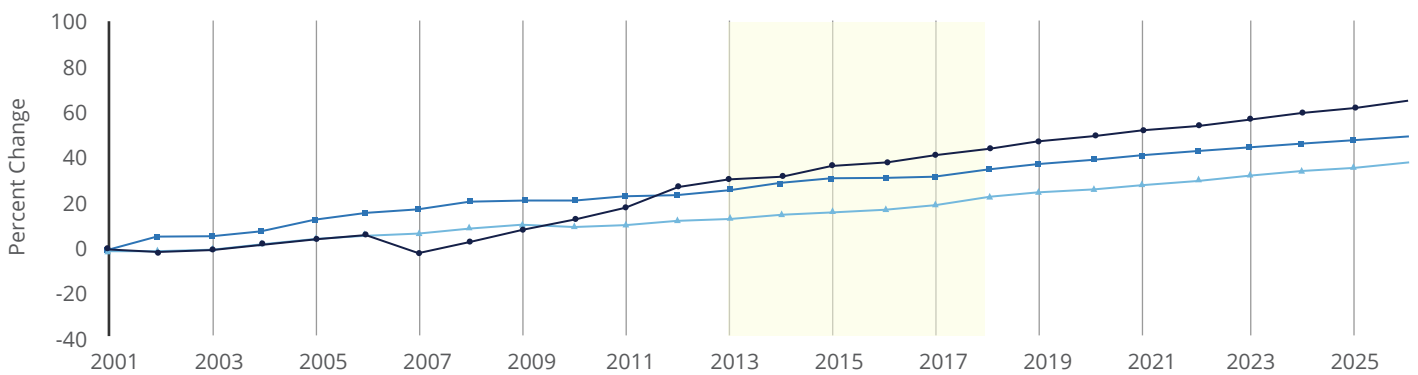
9% below National average

10.6%

% Change (2013-2018)

Nation: 7.8%

Regional Trends



Region	2013 Jobs	2018 Jobs	Change	% Change
● Ottawa	20,412	22,572	2,160	10.6%
● Ontario	273,011	292,230	19,219	7.0%
● Canada	719,833	775,768	55,935	7.8%

Top Occupations Employed by this Industry

Description	Employed in Industry (2018)	% of Total Jobs in Industry (2018)
Secondary and elementary school teachers and educational counsellors, n.e.c.	6,534	28.9%
Elementary school and kindergarten teachers	5,569	24.7%
Secondary school teachers	3,315	14.7%
Elementary and secondary school teacher assistants	2,899	12.8%
School principals and administrators of elementary and secondary education	1,007	4.5%

Source: EMSI Analyst 2019



Local Employment Planning Council
2019 SECTOR SPOTLIGHT

EDUCATIONAL SERVICES