

Educational Services

NAICS 61

Quebec

2022-2024



HIGHLIGHTS

- Education and higher education is the second largest sector in the public services portfolio.
- Employment in educational services has been growing steadily since 2016; this growth accelerated in 2021.
- The lack of staff and the obsolescence of institutions are major issues in the Quebec school system.

ABOUT THE SECTOR

Sector composition and importance

Education and higher education is the second largest sector in the public services portfolio in Quebec, after health and social services.

In this sector, demand is driven by enrolment, i.e., the number of young people aged 4 to 25 enrolled in an educational institution, while the supply of services is driven by government spending.

For the period from 2019 to 2021, average employment was 322,700 workers, which represents 7.6% of the total employment in Quebec and is comparable with the Canadian and Ontario averages (7.4%).

Educational services are comprised of public and private institutions and are grouped into elementary and secondary schools (62.3%), community colleges and CEGEPs (11.1%), universities (17.7%) and other educational services (8.9%).

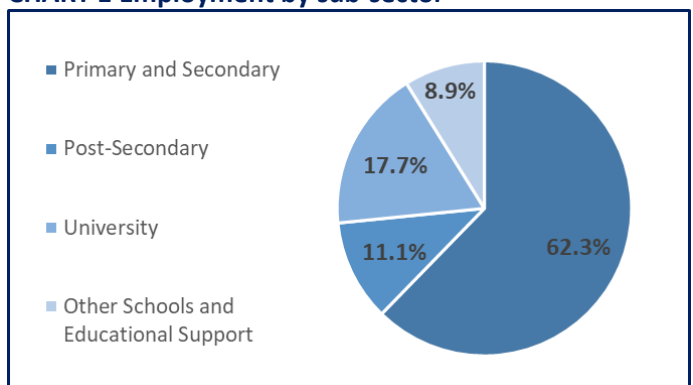
Since June 2020, a new model of school governance has been in place in Quebec; French-language school boards have been transformed into school service centres, providing more autonomy to schools.

TABLE 1 Employment by region

Region	Average employment 2019–2021	Share of total employment
Canada	1,382,800	7.4%
Quebec	322,700	7.6%
Ontario	534,300	7.4%

Source: Statistics Canada, Labour Force Survey

CHART 1 Employment by sub-sector



Source: Statistics Canada, Labour Force Survey

Geographical distribution of employment

Jobs are distributed across all regions of the province, but they are proportionally more numerous in urban areas, such as the Montreal census metropolitan area (54.1%) and the Capitale-Nationale region (9.4%). This is due to not only the distribution of the population over the territory, but also to the greater presence of academic institutions in these regions.

The city of Montreal is unique in that it has the largest number of English-language schools in Quebec and the largest proportion of immigrant students. In 2019, these students represented 56.6% of the public elementary and secondary students on the island of Montreal.

Regions far from major urban centres, such as Abitibi-Témiscamingue, Côte-Nord and Nord-du-Québec, Bas-Saint-Laurent, Gaspésie-Îles-de-la-Madeleine and Saguenay-Lac-Saint-Jean, are less significant in terms of jobs, accounting for only 8.5% of the sector's employment.

These regions are facing the challenge of the exodus of young people aged 15 to 24 because historically, they have one of the largest negative inter-regional migration records in Quebec for this age group. However, according to 2020–2021 data released by the Institut de la statistique du Québec, the situation is improving for all of these regions, with the deficit between the number of departures and entries being less significant than in the 2000s. The Saguenay-Lac-Saint-Jean region even has a positive assessment.

WORKFORCE

Workforce characteristics

The teaching services workforce is predominantly female (68.7% women). The proportion even increases to 75.6% in elementary and secondary schools. Employees are also younger, with fewer workers aged 55 and older than average (19.2% vs. 21.5%) and are better educated, with 65.4% holding a university degree, compared with 30.5% for the average for all sectors.

The workload has become more complex and heavy in recent years, which may explain why some teachers are asking for a reduction in their working hours. The proportion of employees working part time is thus higher in this sector than the Quebec average (24.4% versus 18.0%).

Main occupations

Because of the weight of the elementary and secondary school sub-sector, elementary and preschool teachers and secondary school teachers occupy the largest combined share of employment (40.6%).

The next three most significant occupations in terms of employment are at the post-secondary level and account for 19.5% of employment. More than 6 out of 10 workers are directly responsible for teaching.

TABLE 2 Main occupations in the sector

Occupation	Average employment 2019-2021	Sector share
Elementary school and kindergarten teachers	75,800	23.5%
Secondary school teachers	55,100	17.1%
College and other vocational instructors	28,800	8.9%
Post-secondary teaching and research assistants	18,900	5.9%
University professors and lecturers	15,200	4.7%

Source: Statistics Canada, Labour Force Survey

RECENT EVOLUTION

Employment in educational services has been growing steadily since 2016. Although the sector experienced a setback when the pandemic began, the recovery was quick, so that all losses were recouped, ending 2020 with an increased workforce over the previous year. For 2021, growth has continued, but at a much faster rate than in previous years (+9.4% versus +0.6% for the annual average from 2016 to 2020).

Enrolment in Quebec has been on a moderate, but steady, upward trajectory for the past few years, mainly due to

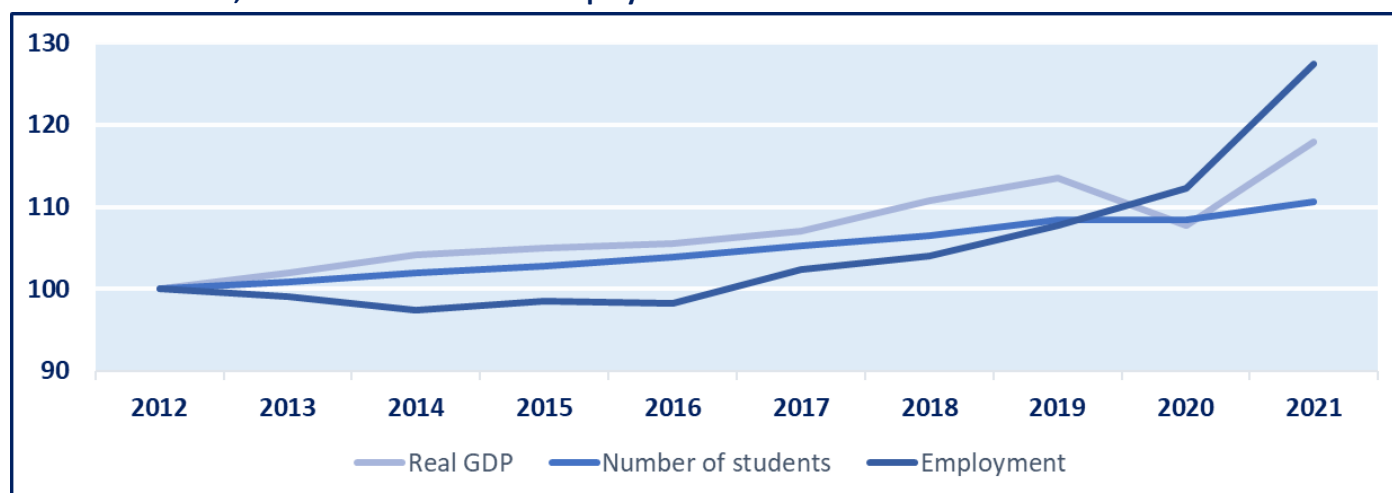
immigration, the increase in the birth rate observed between 2003 and 2012, and the gradual deployment of the kindergarten network accessible to 4-year-olds. At the post-secondary level, there has also been a significant increase in the enrolment of international students in the province's universities, which has more than doubled in a decade, between the years 2009–2010 and 2019–2020. However, pandemic-related lockdowns and subsequent domestic travel restrictions severely limited the international education sector, which, in turn, affected the number of students at all levels,

which increased only slightly in 2020–2021. The gradual relaxation of health measures, however, seems to have had a positive impact on the increase in students in 2021–2022, which, according to provisional data, has seen the highest annual growth in recent years.

The significant reduction in international student enrolment has also had an impact on the gross domestic product (GDP) of

educational services, which declined significantly in 2020 as a result of the decline in education revenues associated with this clientele. This downturn thus ended the period of uninterrupted growth of the last few years, but it was only short-lived, for by 2021, GDP had returned to growth, stimulated mainly by major investments in education, as well as the return to growth in the number of international students.

CHART 2 Real GDP, number of students and employment*



Sources: Institut de la statistique du Québec; MEQ, PSP, GSRB, DIS, School Enrolment Forecasts; Statistics Canada, Labour Force Survey.

* Data is expressed as an index where 2012 = 100

JOB PERSPECTIVES

The employment outlook for the Educational Services sector is favourable for the 2022–2024 forecast period.

According to the Ministère de l'Éducation et de l'Enseignement supérieur du Québec, the overall evolution of student enrolment is expected to increase slightly. Specifically, preschool (K-5) and elementary school enrolment is expected to decline, while secondary and post-secondary enrolment will continue to grow, but to a greater extent for college.

The roll-out of kindergarten classes for 4-year-olds, not included in the above projections, should, however, contribute to growth at the preschool level. For the beginning of the school year 2022–2023, 265 classes are added to the 1,345 already established. The timeline for the remaining 990 classrooms, expected by 2025–2026, is not yet known, but there are issues related to teacher staffing, space availability, and the cost of building these classrooms that could slow the roll-out.

At the post-secondary level, despite a recent tightening of the requirements for the recruitment of international students to higher education institutions, the increase in this clientele should continue.

Education remains a priority for the Quebec government. An action plan for success in higher education provides for a significant budget to promote access to college and university studies, student retention, graduation and socio-professional integration.

The preschool, primary and secondary education sector is facing a teacher shortage. A combination of factors may account for the magnitude of this situation, including increased student enrolment, retirements, increased absenteeism, which has been exacerbated by the pandemic, decreased enrolment in training to enter the profession, young teacher career shifts, and decreasing student-to-class ratios.

In this labour shortage environment, school service centres may resort to hiring non-legally qualified teachers (NLQTs), whose numbers have increased sharply since the start of the pandemic. To promote the development of their skills and their professional integration, NLQTs have the opportunity to follow a qualifying university pathway leading to a teaching certificate.

In order to attract experienced staff to the school system and to encourage retired staff to return to teaching, the

government wishes to maintain the financial incentive put in place in the context of the pandemic.

Staffing shortages also affect educational services such as remedial education, psycho-education, speech therapy, special education and psychology. According to a report by the Québec Ombudsman, even before the pandemic, school organizations did not have the staff required to meet the needs of all students, especially those with learning difficulties in elementary school. However, a reform of the funding of services for students with handicaps, social maladjustments or learning difficulties planned for 2023 will allow school professionals to provide more hours of services to children thanks to a reduction in administrative formalities.

The Quebec government has also announced significant investments to enhance school staff, including the addition of support staff to assist teachers with related tasks.

Comparison with all industries

Employment growth in educational services is expected to be slightly higher than in all industries in the province. Indeed, the Quebec government is counting on major investments in education for economic recovery, including the acceleration of infrastructure projects, improved access to education and academic success, as well as the graduation of a greater number of students. These initiatives would address the labour shortages faced by many industries.

Sub-sector characteristics

Several factors related to the pandemic (access to and use of technology, motivation in a distance learning context, difficult work-study balance, etc.) could have had a negative influence on student retention and success, resulting in lower-than-expected enrolment growth. Thus, the labour shortage makes it more difficult to attract faculty and professionals to the sector and at the same time limits workforce growth. The majority of school service centres have seen an increase in high school dropouts since the beginning of the pandemic.

The health crisis has likely had a downward impact on enrolment, primarily in vocational, technical and specialized training, especially in programs associated with industries that have slowed down (food service, tourism, arts, etc.), while more applications are expected for health-related training, in particular where people may be redirecting their careers. There are also favourable government incentives for this.

The resumption of immigration is also expected to increase the enrolment of allophone students in elementary and secondary

schools, particularly those located in the Montreal metropolitan area. In addition, there will be increased demand for the enriched Francization program offered to newcomers. Courses are held in public educational institutions or in community settings.

Sub-regional characteristics

In the educational services sector, many elementary and secondary schools in Quebec are in a worrisome state. The Montreal and Laval regions have the highest proportion of buildings in poor condition. From a human resources perspective, the age of facilities can have an impact on employee well-being and staff retention.

The phenomenon of inter-regional migration of families from the city of Montreal to adjacent suburbs has been around for a few years, but has become more pronounced with the pandemic. This could result in increased student enrolment in elementary and secondary schools located in outlying regions, such as Montérégie, Laval, Lanaudière, and the Laurentians.

Demographic trends and the exodus of young people to large urban areas call into question the survival of certain educational programs in the regions and the financial equilibrium of the institutions that offer them. Major governmental measures have been announced to attract students from other regions of Quebec or from abroad, which will be favourable to the employment of this occupational group, as well as to the regional economic dynamism.

Other important aspects

During the pandemic, educational institutions have demonstrated their ability to adapt to online education. Thus, thanks to technological advances and learner enthusiasm, the online education market is expected to grow. The government could also use this opportunity for change to improve the way it does business and set directions for the future. The accelerated development of online teaching will certainly have the impact of modifying the qualifications required of future teachers from a techno-pedagogical standpoint.

MORE INFORMATION

Note: The authors of this document took great care to prepare it based on their research on labour market information, which was accurate and relevant at the time of publication. Since the labour market is constantly changing, the data provided may have changed since this document was published. Readers are encouraged to consult other sources for additional information on the local labour market and economy. The information presented in this document is not necessarily a reflection of Employment and Social Development Canada.

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For more information, please contact the Labour Market Analysis Branch at

<https://srv144.services.gc.ca/cgi-bin/ContactForm-FormulaireContact/index.aspx?GoCTemplateCulture=en-CA§ion=imt>

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ANNEX

TABLE A1 Geographic Distribution of Employment and Employment Outlook in Quebec, average 2019-2021 — Educational Services

Region	Share of employment in Quebec	Share of employment in the region	Annual growth
QUEBEC as a whole	100.0%	7.6%	7.1%
Abitibi-Témiscamingue	1.7%	7.4%	0.3%
Bas-Saint-Laurent	2.1%	7.8%	1.1%
Capitale-Nationale	9.4%	7.9%	1.1%
Centre-du-Québec	3.1%	8.0%	31.2%
Chaudière-Appalaches	4.4%	6.4%	8.7%
Estrie	4.5%	9.0%	3.7%
Lanaudière	5.8%	7.2%	8.6%
Laurentides	6.1%	6.5%	5.3%
Mauricie	2.8%	7.5%	20.4%
Montérégie	16.6%	6.7%	7.5%
Montréal (metropolitan area)	54.1%	7.9%	8.8%
Outaouais	5.4%	8.7%	4.2%
Saguenay-Lac-Saint-Jean	2.8%	7.2%	7.0%

Source: Statistics Canada, Labour Force Survey

TABLE A2 Workforce Characteristics in Quebec, average 2019-2021 — Educational Services

Characteristic	Volume	Share in the sector	Share in all sectors
Total employment	322,700	100.0%	100.0%
Male	100,900	31.3%	52.6%
Female	221,800	68.7%	47.4%
Aged 15-24	20,100	6.2%	13.1%
Aged 25-54	240,400	74.5%	65.3%
55 years of age or older	62,100	19.2%	21.5%
Full-time employment	244,100	75.6%	82.0%
Part-time Employment	78,600	24.4%	18.0%
Employee	309,700	96.0%	87.4%
Autonomous worker	13,000	4.0%	12.6%
No diploma	4,600	1.4%	9.5%
Graduated High School	20,300	6.3%	18.2%
Post secondary certificate or diploma	86,400	26.8%	41.9%
University degree	210,900	65.4%	30.5%

Source: Statistics Canada, Labour Force Survey