



## Sector Profile for London's Educational Services (NAICS 61)

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## Table of Contents

Sector Profile for London: Educational Services (NAICS 61) .....	4
Sector Profile Highlights .....	4
Educational Services NAICS 61 (London CY) .....	5
Educational Services NAICS 61 (London CMA) .....	6
Strengths and Opportunities Highlights .....	7
Strengths .....	7
Opportunities .....	8
1. Industry Overview .....	10
1.1. Educational Services NAICS 61 (London CY) .....	10
1.2. Educational Services NAICS 61 (London CMA) .....	11
2. Economic Overview .....	12
2.1. London's Sectoral Performance .....	14
2.2. London's Competitive Analysis Findings in Comparison with other Municipalities (2022 - 2023) .....	16
3. Subsector Analysis .....	18
3.1. Educational Services (611) .....	19
3.1.1. Competitive Analysis Findings for London's Industry Groups in the Educational Services Industry .....	20
3.1.2. Industry Group Analysis .....	22
a. Elementary and Secondary Schools (6111) .....	22
b. Community Colleges and C.E.G.E.P.s (6112) .....	23
c. Universities (6113) .....	24
d. Business Schools and Computer and Management Training (6114) .....	25
e. Technical and Trade Schools (6115) .....	25
f. Other Schools and Instruction (6116) .....	26
g. Educational Support Services (6117) .....	27
4. SWOT Analysis of London's Educational Services Sector .....	28
4.1. Strengths .....	28
4.1.1. Presence of World-class Educational Institutions .....	28
4.1.2. Skilled Workforce and High Employment Rate .....	29
4.1.3. Collaboration and Innovation .....	30

4.1.4. Strong Education System and Major Employers .....	31
4.1.5. Public Funding Support .....	39
<b>4.2. Weaknesses.....</b>	<b>40</b>
4.2.1. Dependence on Government Funding .....	40
4.2.2. Labour Shortages.....	41
<b>4.3. Opportunities .....</b>	<b>41</b>
4.3.1. Population Growth .....	42
4.3.2. Demand for Postsecondary Education and Training .....	42
4.3.3. Investment and Research Collaborations.....	43
<b>4.4. Threats .....</b>	<b>45</b>
4.4.1. Economic Uncertainty .....	45
4.4.2. Regulatory Changes.....	45
4.4.3. Other Threats .....	46
<b>Appendix A - London's Competitive Analysis Findings in Comparison with other Municipalities (2016 - 2021) .....</b>	<b>47</b>

# Sector Profile for London: Educational Services (NAICS 61)

## Sector Profile Highlights

The Educational Services industry was home to approximately 142 establishments and employed 24,101 people in 2023, making up 11.1%<sup>1</sup> of London's total workforce, thus making it one of London's key sectors (top 3) (Lightcast, November 1, 2024<sup>2</sup>, London CY). This sector is a vital part of London's economy, developing knowledge and skills for London and Canada's labour force.

London has four public school boards, including the [Thames Valley District School Board](#), [London District Catholic School Board](#), [Conseil scolaire Viamonde](#), and [Conseil scolaire catholique Providence](#), which offer a variety of elementary, secondary, and continuing/adult education options. The city also has more than 20 registered private schools from junior kindergarten through to high school. Many are geared to specific cultures and religions, including the [Al-Taqwa Islamic School](#), [London Community Hebrew Day School](#), the [Montessori Academy of London](#), and other English as a second language schools<sup>3</sup>.

Over 88,000<sup>4</sup> students choose to learn in London every year at one of the city's post-secondary institutions. [Western University](#) offers 400+ combinations of undergraduate majors, minors, and specializations and another 160 graduate degree programs and collaborative specializations, including a range of interdisciplinary programs, to its 40,676 undergraduates and postgraduates every year<sup>5</sup>. There are 372,481 Western alumni living in 160 countries around the world<sup>6</sup>.

Western is known for its medical, dental, engineering, programs, and research capabilities in addition to areas of focus at its two affiliate university colleges<sup>7</sup>:

- [Huron University College](#) - a liberal arts university college known for its art and social science, management and organizational studies, and theology programs.
- [King's University College](#) - recognized both nationally and internationally for its excellent academic programs (in the arts, social sciences, management and social work), commitment to research excellence, generous scholarships and comprehensive student services.

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<sup>1</sup> [Highest Ranked Industries « Lightcast Analyst](#)

<sup>2</sup> [Industry Overview « Lightcast Analyst](#)

<sup>3</sup> [Learning in London | London Economic Development Corporation \(ledc.com\)](#)

<sup>4</sup> The 2023-2024 enrollment number contains Western (including the former Brescia) at 40,676, Huron at 1,788, King's at 3,307, and Fanshawe at 43,000. Data received on October 3, 2024, via email from Western.

<sup>5</sup> The number includes Western and the former Brescia University College. Data received on October 3, 2024, via email from Western.

<sup>6</sup> <https://www.uwo.ca/about/whoweare/facts.html>

<sup>7</sup> [Learning in London | London Economic Development Corporation \(ledc.com\)](#)

Western is home to [Ivey Business School](#), one of the top business schools in the world known for its business programs which offers a case-study method of learning<sup>8</sup>.

As one of the largest colleges in Ontario, [Fanshawe College](#) welcomes more than 43,000 students each year and offers over 220 programs across its five campuses. With over 225,000 alumni, 89.7% of Fanshawe graduates find employment within six months (provincial average of 85.8%). In addition, London is home to Collège Boréal, Ontario Institute of Audio Recording Technology (OIART), Westervelt College, and triOS College<sup>9</sup>.

The city also offers corporate training and continuing education institutions such as the [Ivey Academy](#), [Fanshawe Corporate Training Solutions](#), and [Western Continuing Studies](#). Additionally, there are also several learning and continuing education options at the [Thames Valley District School Board's GA Wheable Centre for Adult Education](#), the [London District Catholic School Board's St. Patrick Adult + Continuing Education Centre](#), and various professional development organizations<sup>10</sup>.

The city's services-producing sectors, particularly healthcare services, educational services, and professional, scientific, and technical services were a source of strength in 2023 (Conference Board of Canada, Major City Insights London, November 30, 2023).

## Educational Services NAICS 61 (London CY<sup>11</sup>)

- Number of employees/Number of jobs:
  - The number of employees by place of work status (CY) in 2021: 18,195<sup>12</sup> (2021 Census Data, Statistics Canada)
  - Number of jobs (CY) in 2023: 24,101<sup>13</sup> (Lightcast, November 1, 2024)
- Canadian business counts:
  - Total number of establishments in 2022: 134<sup>14</sup> (2022 Canadian Business Counts, Statistics Canada)
  - Total number of establishments in 2023: 142<sup>15</sup> (Lightcast, November 1, 2024)

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<sup>8</sup> [Learning in London | London Economic Development Corporation \(ledc.com\)](#)

<sup>9</sup> Information collected via email with Fanshawe College on August 15, 2024.

<sup>10</sup> [Learning in London | London Economic Development Corporation \(ledc.com\)](#)

<sup>11</sup> London, City (CY), or Census subdivision (CSD). Census subdivision is the general term for municipalities (as determined by provincial/territorial legislation) or areas treated as municipal equivalents for statistical purposes (e.g., Indian reserves, Indian settlements and unorganized territories). ([Statistical Area Classification by Province and Territory - Variant of SGC 2016 - Introduction - Definitions; Profile table, Census Profile, 2021 Census of Population - London, City \(CY\) \[Census subdivision\], Ontario](#))

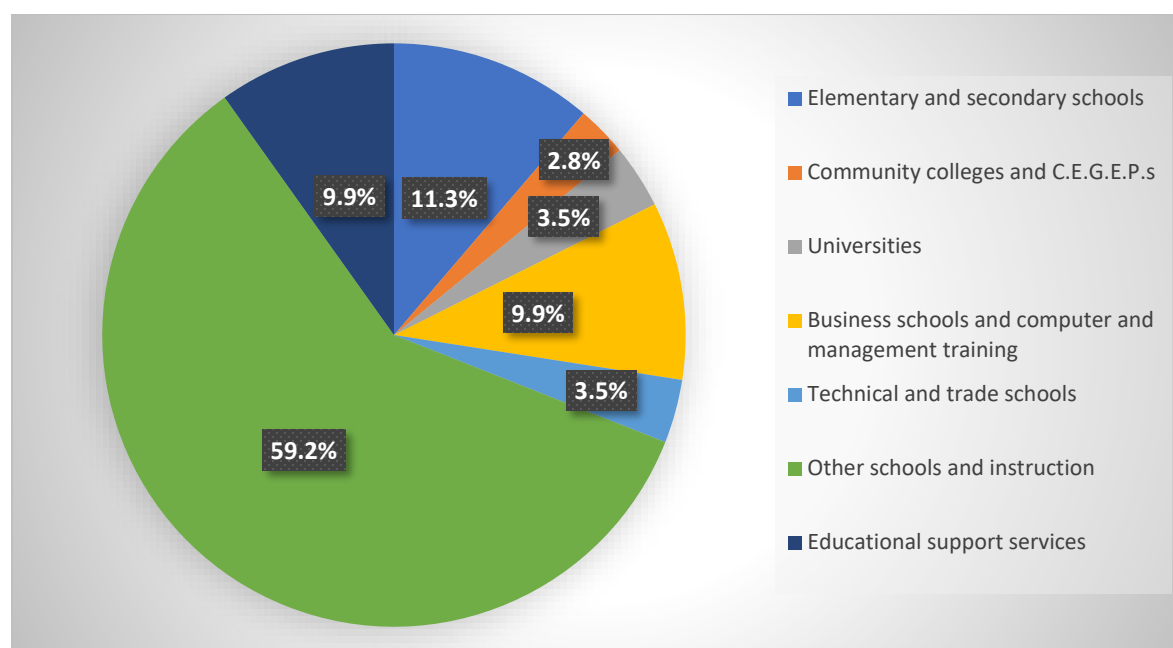
<sup>12</sup> [Add/Remove data - Place of work status by industry sectors, occupation broad category and gender: Canada, provinces and territories, census divisions and census subdivisions \(statcan.gc.ca\)](#)

<sup>13</sup> [Industry Overview « Lightcast Analyst](#)

<sup>14</sup> [Add/Remove data - Canadian Business Counts, with employees, census metropolitan areas and census subdivisions, December 2022 \(statcan.gc.ca\)](#)

<sup>15</sup> [Industries by Business Location Size « Lightcast Analyst](#)

**Graph 1. Establishment Share by Industry Group (London CY) in 2023**



Source: Lightcast<sup>16</sup>, November 1, 2024

## Educational Services NAICS 61 (London CMA<sup>17</sup>)

- Number of employees/Number of jobs:
  - The number of employees by place of work status (CMA) in 2021: 22,300<sup>18</sup> (2021 Census Data, Statistics Canada)
  - Number of jobs (CMA) in 2023: 27,754<sup>19</sup> (Lightcast, November 1, 2024)
- Canadian business counts:
  - Total number of establishments in 2022: 162<sup>20</sup> (2022 Canada Business Counts, Statistics Canada)
  - Total number of establishments in 2023: 171<sup>21</sup> (Lightcast, November 1, 2024)

<sup>16</sup> [Industries by Business Location Size « Lightcast Analyst](#)

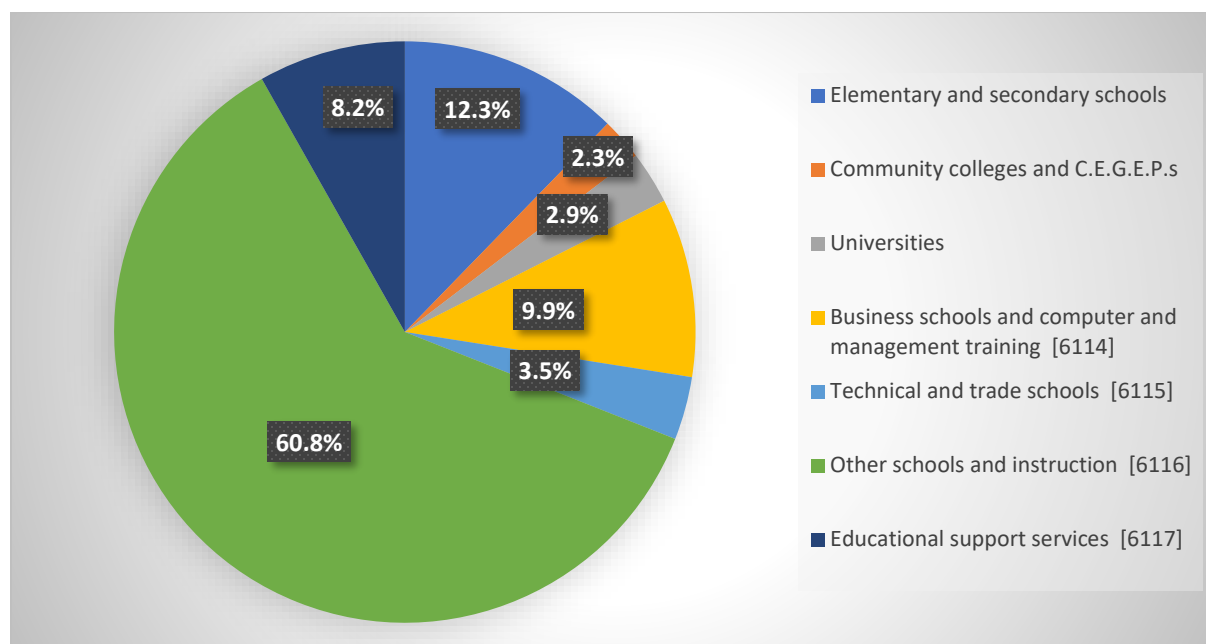
<sup>17</sup> A census metropolitan area (CMA) is formed by one or more adjacent municipalities centred on a population centre ([Dictionary, Census of Population, 2021 – Census metropolitan area \(CMA\) and census agglomeration \(CA\)](#)). The London CMA includes the municipalities of London, St. Thomas, as well as Thames Centre, Middlesex Centre, Strathroy-Caradoc, Adelaide Metcalfe, Central Elgin and Southwold ([What is the London Census Metropolitan Area \(CMA\)? | MLHU - Health Status Resource; Statistical Area Classification by Province and Territory - Variant of SGC 2016 - 35555 - London](#)).

<sup>18</sup> [Add/Remove data - Place of work status by industry subsectors, occupation broad category, age and gender: Canada, provinces and territories, census metropolitan areas and census agglomerations with parts \(statcan.gc.ca\)](#)

<sup>19</sup> [Industry Overview « Lightcast Analyst](#)

<sup>20</sup> [Add/Remove data - Canadian Business Counts, with employees, census metropolitan areas and census subdivisions, December 2022 \(statcan.gc.ca\)](#)

<sup>21</sup> [Industries by Business Location Size « Lightcast Analyst](#)

**Graph 2. Establishment Share by Industry Group (London CMA) in 2023**

Source: Lightcast<sup>22</sup>, November 1, 2024

## Strengths and Opportunities Highlights

### Strengths

- London has a strong educational system, from primary to post-secondary level, that offers the next generation of talent outstanding education<sup>23</sup>.
- The presence of world-class educational institutions such as Western University which includes the Ivey Business School has a significant economic impact on London's economy.
  - Western has a substantial presence in the London area, being the largest employer and supporting the local economy with a budget exceeding \$1.618 billion in 2023-2024<sup>24</sup>. Western University is ranked among the top 1% of higher education institutions worldwide<sup>25</sup>. The university has 14,503 employees and 40,676<sup>26</sup> students, including more than 4,690 international students from 126 countries, with an employment rate of 92.3% six months after graduation<sup>27</sup>.
  - Ivey Business School has earned an international reputation for its teaching and research excellence and the high caliber of its students and faculty. For nine years, Bloomberg Businessweek has ranked Ivey the No. 1 Master of Business Administration (MBA) program in Canada (2014-2019, 2022-2024). Renowned for its Case-Method of Learning,

<sup>22</sup> [Industries by Business Location Size « Lightcast Analyst](#)

<sup>23</sup> [Learning in London | London Economic Development Corporation \(ledc.com\)](#)

<sup>24</sup> Western Constituent University's total revenue (all sources of funding). Data received from Western via email on October 3, 2024.

<sup>25</sup> [Facts & Figures - Western University \(uwo.ca\)](#)

<sup>26</sup> The number includes Western and the former Brescia University College. Data received on October 3, 2024, via email from Western.

<sup>27</sup> [Facts & Figures - Western University \(uwo.ca\)](#), additional data was received from Western on October 3<sup>rd</sup>, 2024, via email.

Ivey Business School is one of the two most important producers of business cases in the world, alongside Harvard<sup>28</sup>.

- London also boasts Fanshawe College, one of the largest colleges in Ontario, which has campuses in London, Simcoe, St. Thomas, Woodstock, and additional locations across Southwestern Ontario. Fanshawe is a \$1.6 billion economic driver to London and the surrounding region<sup>29</sup>. Fanshawe has approximately 43,000 students and provides over 220 higher education programs<sup>30</sup> across many disciplines including arts, media, design, technology and skilled trades, business, information technology, culinary, health, and human services<sup>31</sup>.
- Western University and Fanshawe College offer a range of programs, providing a steady supply of skilled professionals for London with high employment rates. Both Western University and Fanshawe College have higher employment rates after graduation than the provincial average of 85.8%<sup>32</sup> (as of April 11, 2024).

## Opportunities

- Population growth and demand for postsecondary education and training will continue to drive growth in the sector<sup>33</sup>.
  - London's overall population growth will support the demand for employment in this sector. As an example, the London District Catholic School Board (LDCSB) hired nearly 100 permanent teachers for Fall 2023. LDCSB's student population increased approximately 30% over the past five years and the London area is now one of the fastest growing regions in Canada. This rapid growth resulted in a need for qualified teachers at a pace not seen in decades<sup>34</sup>.
  - According to the Canadian Occupational Projection System, approximately 71% of the projected employment growth across the country between 2022 and 2031 is expected to be in occupations requiring postsecondary education or be in management. This indicates that even though university and college fees have been climbing, demand for enrolment will likely still be high. Canadian postsecondary enrolment levels are projected to increase by 11.2% between 2022 and 2031<sup>35</sup>.
- Based on its research excellence and high-quality education, London has opportunities to attract more investment and research collaborations to expand the sector's reach and impact.
  - In 2022, Western University received \$10 million donation from Ron Schmeichel, a Canadian entrepreneur and financier, for a new entrepreneurship and innovation building. The 100,000 sq. ft. building opened on September 27, 2024, and is located in the heart of Western's campus and named the Ronald D. Schmeichel Building for

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<sup>28</sup> [Quick Facts | Ivey Business School \(uwo.ca\)](#)

<sup>29</sup> [Capital Project Innovation Village Overview - Fanshawe College \(fanshawefoundation.ca\); Archived - 2017-20 Strategic Mandate Agreement: Fanshawe College of Applied Arts and Technology | ontario.ca](#)

<sup>30</sup> [The Fanshawe Advantage | Fanshawe College](#)

<sup>31</sup> [About Fanshawe | Fanshawe College](#)

<sup>32</sup> [The Fanshawe Advantage | Fanshawe College](#)

<sup>33</sup> [Educational Services: Ontario 2023-2025 - Job Bank](#)

<sup>34</sup> [News | London District Catholic School Board \(ldcsb.ca\)](#)

<sup>35</sup> [Educational Services: Ontario 2023-2025 - Job Bank](#)

Entrepreneurship and Innovation. The new facility is Western's first net-zero-energy building and a gathering place with state-of-the-art active learning classrooms, a space with 3D printers, metalworking, machinery and woodworking tools, and a digital lab<sup>36</sup>.

- Western's Schulich School of Medicine & Dentistry has received \$16 million (2022) as part of the federal Biosciences Research Infrastructure Fund (BRIF) for the expansion of its state-of-the-art biocontainment level 3 (CL3) facility – Imaging Pathogens for Knowledge Translation (ImPaKT), located within the new Pathogen Research Centre (PRC)<sup>37</sup>. The new expansion will also include a drug manufacturing facility, allowing both research and industry partners to produce pharmaceutical-grade drugs at Western.
- Western University received \$8 million (2023) in federal funding to recruit Dr. Robyn Klein as its new Canada Excellence Research Chair (CERC) in Neurovirology and Neuroimmunology. Dr. Klein is world renowned for her groundbreaking work on the effects of viral infections and neuroinflammation on memory and will lead Canada's first-ever research program focused on understanding the impact of infectious diseases on cognition and the human brain<sup>38</sup>.
- Western is positioned to lead the fight against neurodegenerative diseases with \$24 million (2023) in support from the federal [New Frontiers in Research Fund \(NFRF\)](#). The new project is called TRanslational Initiative to DE-risk NeuroTherapeutics (TRIDENT). Led by Schulich School of Medicine & Dentistry professor [Ravi Menon](#), a team of researchers has developed a groundbreaking approach to identify promising therapies for diseases such as Alzheimer's and Parkinson's and speed up their journey to market<sup>39</sup>.
- In 2023, a team led by Western neuroscientist Jörn Diedrichsen received \$1 million in funding from the Once Upon a Time Foundation to develop a growth chart for the human cerebellum across an entire lifespan from birth to 80 years. The growth chart will allow clinicians for the first time to track neural development across a lifespan, providing a framework for diagnosis and prognosis<sup>40</sup>.
- In 2023, Fanshawe College received a donation of \$5 million from a Toronto-based philanthropist Diane Blake to establish a state-of-the-art Centre of Excellence for XR (Extended Reality) in Health Care. This generous contribution will revolutionize the field of health-care education by leveraging cutting-edge XR technology to enhance training and improve patient outcomes.
- Fanshawe College's Centre for Research and Innovation (CRI) was awarded a grant of \$2,250,000 from the Natural Sciences and Engineering Research Council of Canada (NSERC) Mobilize program (2024), as part of the College and Community Innovation (CCI) initiative. This significant funding will play a crucial role in advancing Fanshawe's commitment to fostering innovation and addressing the evolving needs of the regional labour market<sup>41</sup>.

<sup>36</sup> [\\$10 million donation given to Western to fund new entrepreneurship and innovation building | CTV News](#)

<sup>37</sup> [Western's ImPaKT facility gets \\$16M from feds for pandemic research - Western News \(westernu.ca\)](#)

<sup>38</sup> [Western recruits top neuroimmunologist as Canada Excellence Research Chair - Western News \(westernu.ca\)](#)

<sup>39</sup> [Western to revolutionize drug development for brain diseases with \\$24M federal funding boost - Western News \(westernu.ca\)](#)

<sup>40</sup> [Western-led human brain "growth chart" project receives \\$1M in funding \(westernu.ca\)](#)

<sup>41</sup> [Centre for Research and Innovation secures \\$2,250,000 research grant from NSERC | Fanshawe College](#)

# 1. Industry Overview

The educational services industry in London, Ontario is a vital part of the local economy, developing knowledge and skills for London and Canada's labour force. The industry comprises specialized establishments such as schools, colleges, universities, and training centers. These establishments are primarily engaged in providing instruction and training in a wide variety of subjects which make a significant contribution to the development of labour force in different sectors.

## 1.1. Educational Services NAICS 61 (London CY)

- Number of employees/Number of jobs
  - The number of employees by place of work status (CY) in 2021: 18,195<sup>42</sup> (2021 Census Data, Statistics Canada)
  - Number of jobs (CY) in 2023: 24,101<sup>43</sup> (Lightcast, Nov. 1, 2024)
- Canadian business counts:
  - Total number of establishments in 2022: 134<sup>44</sup> (2022 Canadian Business Counts, Statistics Canada)
  - Total number of establishments in 2023: 142<sup>45</sup> (Lightcast, Nov. 1, 2024)
    1. Elementary and secondary schools (6111): 16<sup>46</sup>
    2. Community colleges and C.E.G.E.P.s (6112): 4
    3. Universities (6113): 5
    4. Business schools and computer and management training (6114): 14
    5. Technical and trade schools (6115): 5
    6. Other schools and instruction (6116): 84
    7. Educational support services (6117): 14

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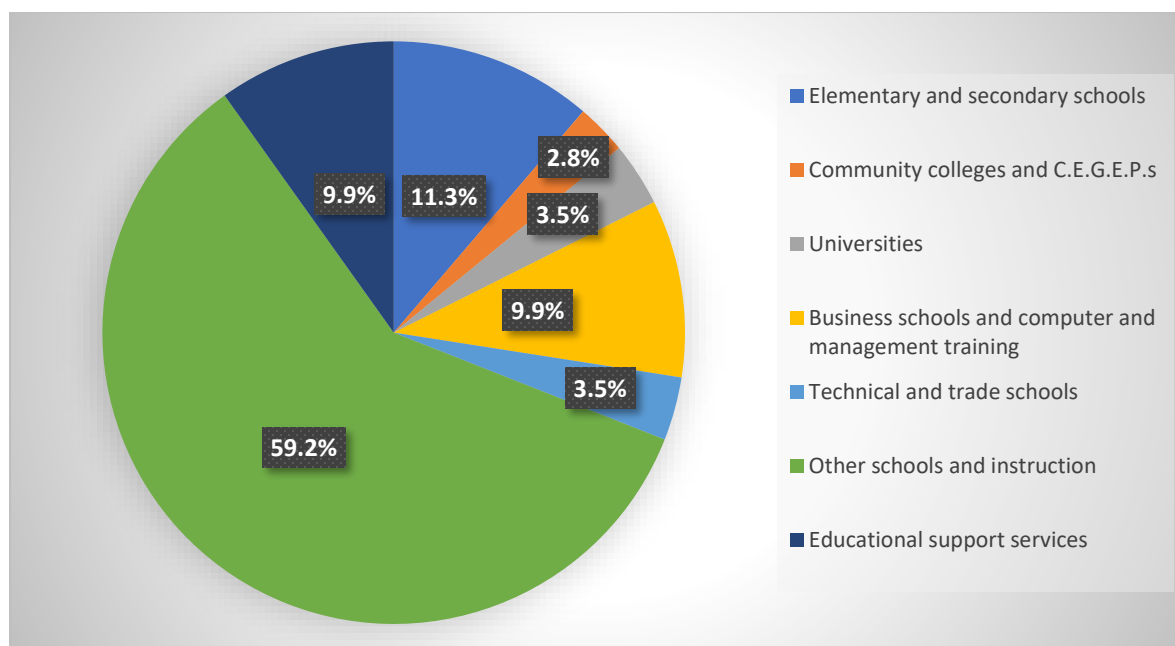
<sup>42</sup> [Add/Remove data - Place of work status by industry sectors, occupation broad category and gender: Canada, provinces and territories, census divisions and census subdivisions \(statcan.gc.ca\)](#)

<sup>43</sup> [Industry Overview « Lightcast Analyst](#)

<sup>44</sup> [Add/Remove data - Canadian Business Counts, with employees, census metropolitan areas and census subdivisions, December 2022 \(statcan.gc.ca\)](#)

<sup>45</sup> [Industries by Business Location Size « Lightcast Analyst](#)

<sup>46</sup> [Industries by Business Location Size « Lightcast Analyst](#)

**Graph 1. Establishment Share by Industry Group (London CY) in 2023**

Source: Lightcast<sup>47</sup>, November 1, 2024

## 1.2. Educational Services NAICS 61 (London CMA)

- Number of employees/Number of jobs
  - The number of employees by place of work status (CMA) in 2021: 22,300<sup>48</sup> (2021 Census Data, Statistics Canada)
  - The number of jobs (CMA) in 2023: 27,754<sup>49</sup> (Lightcast, November 1, 2024)
- Canadian business counts:
  - Total number of establishments in 2022: 162<sup>50</sup> (2022 Canada Business Counts, Statistics Canada)
  - Total number of establishments in 2023: 171<sup>51</sup> (Lightcast, November 1, 2024)
    1. Elementary and secondary schools (6111): 21<sup>52</sup>
    2. Community colleges and C.E.G.E.P.s (6112): 4
    3. Universities (6113): 5
    4. Business schools and computer and management training (6114): 17
    5. Technical and trade schools (6115): 6
    6. Other schools and instruction (6116): 104
    7. Educational support services (6117): 14

<sup>47</sup> [Industries by Business Location Size « Lightcast Analyst](#)

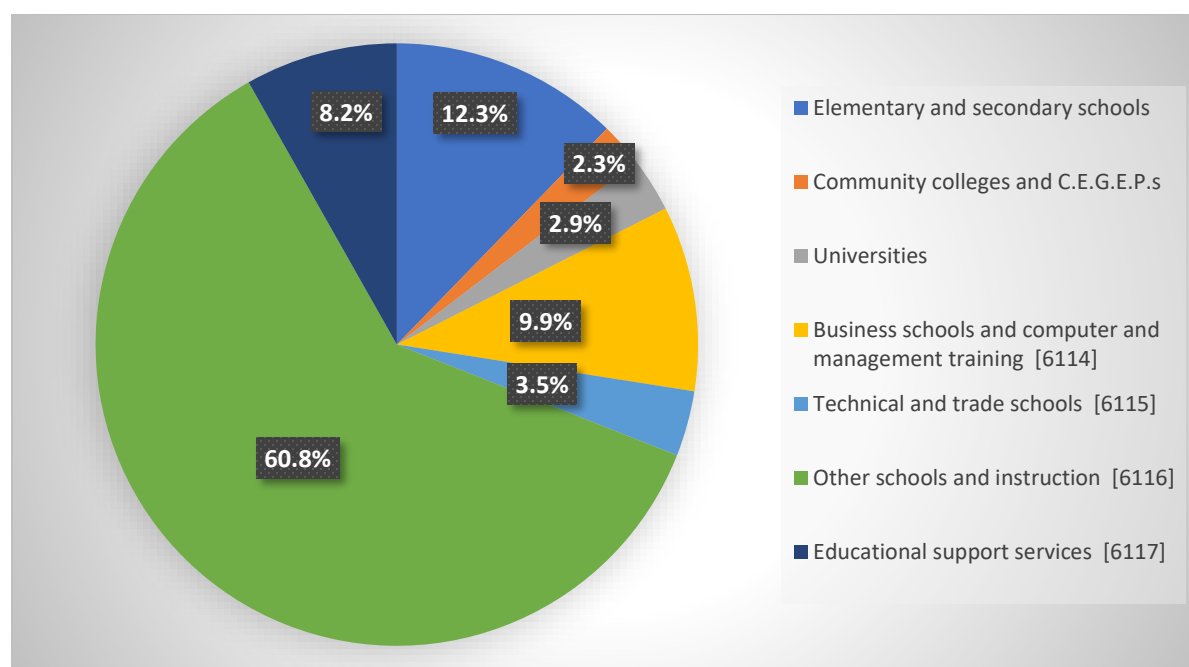
<sup>48</sup> [Add/Remove data - Place of work status by industry subsectors, occupation broad category, age and gender: Canada, provinces and territories, census metropolitan areas and census agglomerations with parts \(statcan.gc.ca\)](#)

<sup>49</sup> [Industry Overview « Lightcast Analyst](#)

<sup>50</sup> [Add/Remove data - Canadian Business Counts, with employees, census metropolitan areas and census subdivisions, December 2022 \(statcan.gc.ca\)](#)

<sup>51</sup> [Industries by Business Location Size « Lightcast Analyst](#)

<sup>52</sup> [Industries by Business Location Size « Lightcast Analyst](#)

**Graph 2. Establishment Share by Industry Group (London CMA) in 2023**

Source: Lightcast<sup>53</sup>, November 1, 2024

## 2. Economic Overview

There were 565,700 people employed in the educational services sector in Ontario, comprising 7.4% of Ontario's total workforce in 2022. Employment in Ontario's education sector increased by 3.6% in 2022. Funding and labour issues in the education sector will continue to impact the outlook in this industry. The province's educational services sector produced \$44.5 billion in gross domestic product (GDP) in 2022, representing 5.7% of Ontario's total GDP<sup>54</sup>.

Table 1 shows the London Economic Region's share of employment between 2020-2022<sup>55</sup>. Workers in the sector were over-represented in several ERs, including Kingston-Pembroke ER, where 9.7% of total employment was in educational services, 8.8% for Kitchener-Waterloo-Barrie ER and 8.4% for London ER. In comparison, this industry made up 7.4% of overall employment in the province.

<sup>53</sup> [Industries by Business Location Size « Lightcast Analyst](#)

<sup>54</sup> <https://www.jobbank.gc.ca/trend-analysis/job-market-reports/ontario/sectoral-profile-educational-services>

<sup>55</sup> <https://www.jobbank.gc.ca/trend-analysis/job-market-reports/ontario/sectoral-profile-educational-services>

**Table 1: Geographical Distribution of the Sector**

	Share of Employment in Ontario (%)	Sector Share of Employment (%)
	2020-2022 Average	2020-2022 Average
Ontario	100.0%	7.4%
Ottawa	9.9%	7.3%
Kingston-Pembroke	3.9%	9.7%
Muskoka-Kawarthas	2.6%	7.8%
Toronto	44.6%	6.8%
Kitchener-Waterloo-Barrie	12.4%	8.8%
Hamilton-Niagara Peninsula	10.4%	7.6%
London	5.7%	8.4%
Windsor-Sarnia	3.7%	6.8%
Stratford-Bruce Peninsula	1.3%	4.5%
Northeast	3.9%	8.5%
Northwest	1.6%	9.0%

Source: Statistics Canada, Labour Force Survey. Note<sup>56</sup>

Table 2 noted below, shows the London Economic Region's share of the educational services industry in 2022 as compared to Ontario<sup>57</sup>. Across the province, the economic region (ER) with the highest proportion of Ontario's workers in the educational services sector as of 2022 was the Toronto ER, with 44.4% of employment. This is due to the high population density in the ER, as well as the area being home to a number of post-secondary institutions.

**Table 2: Employment by Economic Region**

Economic Region	Employed 2022	Sector Share (%)
Ottawa	53,600	9.5%
Kingston-Pembroke	23,600	4.1%
Muskoka-Kawarthas	14,900	2.6%
Toronto	251,400	44.4%
Kitchener-Waterloo-Barrie	70,400	12.4%
Hamilton-Niagara Peninsula	59,100	10.4%
London	33,500	5.9%
Windsor-Sarnia	22,400	4.0%
Stratford-Bruce Peninsula	7,900	1.4%
Northeast	21,400	3.8%
Northwest	8,100	1.4%

Source: Statistics Canada, Labour Force Survey

<sup>56</sup> For analysis completed for London CMA (Q3 2023 data), London's share of employment in the educational services sector was 10.2% (2023).

<sup>57</sup> <https://www.jobbank.gc.ca/trend-analysis/job-market-reports/ontario/sectoral-profile-educational-services>

Women accounted for more than two-thirds (68.7%) of Ontario's educational services workforce in 2022, compared to 47.3% for all industries<sup>58</sup>.

**Table 3: Top 5 Occupations in Ontario**

	Employed 2022	Sector Share (%)
4030 Secondary and Elementary School Teachers and Educational Counsellors, n.e.c.	103,700	18.3%
4032 Elementary school and kindergarten teachers	72,500	12.8%
4413 Elementary and secondary school teacher assistants	39,300	6.9%
4021 College and other vocational instructors	38,800	6.9%
4031 Secondary school teachers	35,600	6.3%

Source: Statistics Canada, Labour Force Survey

As noted in Table 3, the top two occupations in 2022 in the sector were: Secondary and Elementary School Teachers and Educational Counselors, n.e.c. and Elementary school and kindergarten teachers.

## 2.1. London's Sectoral Performance

- The educational services industry was home to approximately 142 establishments and employed 24,101 people in 2023, making up 11.1%<sup>59</sup> of London's total workforce, thus making it one of London's key sectors (top 3) (Lightcast, November 1, 2024<sup>60</sup>, London CY). This sector is a vital part of London's economy, developing knowledge and skills for London and Canada's labour force.
- The city's services-producing sectors (particularly healthcare services, educational services, and professional, scientific, and technical services) were a source of strength in 2023 (Conference Board of Canada, Major City Insights London, November 30, 2023).
- London's average wage per job in 2023 in the educational services sector was \$61,637<sup>61</sup>, which was 2.3% lower than Ontario's at \$63,070<sup>62</sup> and relatively on par with Canada's at \$61,645 (-0.01% difference). In addition, as can be seen in Graph 3, in 2022, London had 23,145 jobs in this industry, which was 41% above the National average, and experienced a 4.1% growth between 2022 – 2023, resulting in 24,101 total jobs in 2023 (Lightcast, November 1, 2024).

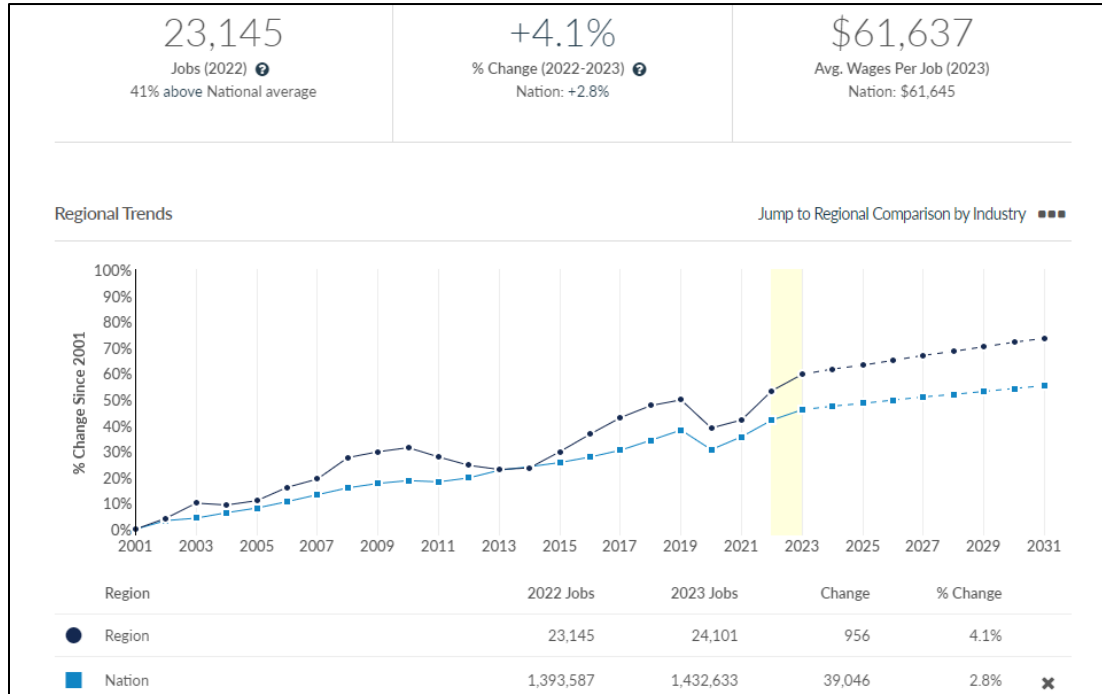
<sup>58</sup> <https://www.jobbank.gc.ca/trend-analysis/job-market-reports/ontario/sectoral-profile-educational-services>

<sup>59</sup> Highest Ranked Industries « Lightcast Analyst, licence provided by the Ministry of Agriculture, Food and Agribusiness

<sup>60</sup> [Industry Overview « Lightcast Analyst](#)

<sup>61</sup> [Industry Overview « Lightcast Analyst](#)

<sup>62</sup> [Industry Overview « Lightcast Analyst](#)

**Graph 3: Employment Trends - London (CY) Compared to Canada (2022 - 2023)**

Source: © Copyright 2024 Lightcast<sup>63</sup>, November 1, 2024.

Table 4 shows that in 2022 'Kindergarten, elementary, and secondary school teachers' made up 11.5% of the total jobs in this industry in London followed by 'Elementary school and kindergarten teachers' at 10.4%.

**Table 4: Occupations Employed by the Educational Services Industry in London**

Description	Employed in Industry (2022)	Employed in Industry (2023)	% Change (2022- 2023)	% of Total Jobs in Industry (2022)
Kindergarten, elementary, and secondary school teachers	2,656	2,618	(1.4%)	11.5%
Elementary school and kindergarten teachers	2,415	2,463	2.0%	10.4%
University professors and lecturers	2,079	2,093	0.7%	9.0%
Post-secondary teaching and research assistants	1,796	1,789	(0.4%)	7.8%
Elementary and secondary school teacher assistants	1,580	1,637	3.6%	6.8%

Source: Lightcast, March 28, 2024<sup>64</sup>

<sup>63</sup> [Industry Overview < Lightcast Analyst](#)

<sup>64</sup> [Industry Overview < Lightcast Analyst](#)

## 2.2. London's Competitive Analysis Findings in Comparison with other Municipalities (2022 - 2023)

This section presents London's competitive analysis findings in comparison with other municipalities in Ontario between 2022 and 2023. The competitive analysis results are based on the location quotient and shift-share approach. It is important to note that this is one analysis method for a competitive analysis.

- Location quotient analysis involves the computation of a ratio that measures each industry's share of total local employment relative to the same industry's share of a reference area's total employment. The reference area can be a region, a province, or a nation. This sector profile presents the location quotient analysis for London as the local community and Ontario as the reference area. The location quotient reflects the contribution of educational services industry to London's economy relative to the contribution of the same industry to Ontario.
- Shift-share analysis focuses on changes that have taken place in the industrial composition of the community. This technique examines variations in local employment relative to changes in employment observed in a reference area. The reference area can be a region, province, or nation. Shift-share analysis is conducted based on the industrial mix effect and differential shift effect:
  - Industrial mix effect measures the change in employment in a local industry attributed to whether the industry is growing or declining in the reference area.
  - Differential shift effect, also known as competitive effect, measures the difference between the rate of change in industry employment at the local level and the rate of change in industry employment at the reference area level. This effect is especially relevant because it highlights location advantages or disadvantages responsible for an industry's growth or decline within a community relative to other locations.

Detailed findings from the competitive analysis completed for 2022 and 2023 are presented below. London was compared to other municipalities in Ontario, including Toronto, Ottawa, Windsor, Kingston, Waterloo, Kitchener, Cambridge, and Hamilton. *For findings of the competitive analysis completed for 2016 and 2021 (Statistics Canada Census Data), please see Appendix A.*

### Location Quotient Findings

Table 5 presents location quotient results for the educational services industry in different municipalities in Ontario in 2023. Ontario was employed as the reference area.

**Table 5: Location Quotient and Shift-Share Findings of Municipalities in Ontario (2022 - 2023)**

Municipalities	2023 Location Quotient	Shift-Share Industrial Mix Effect	Shift-Share Differential Shift Effect	Position of Industry in Municipality
London	1.43	146	53	Driving
Toronto	1.01	738	-1,346	Promising
Ottawa	1.05	297	211	Driving
Windsor	1.10	52	-100	Promising
Kingston	1.81	69	-11	Promising
Waterloo	2.20	74	-5	Promising
Kitchener	1.34	72	340	Driving
Cambridge	0.76	30	78	Rising
Hamilton	1.29	159	84	Driving

Source: Lightcast, Custom Data Analysis – March 21, 2024

As presented in Table 5, London is one of eight municipalities (together with Toronto, Ottawa, Windsor, Kingston, Waterloo, Kitchener, and Hamilton) that had a location quotient greater than one. A location quotient higher than one points to the concentration or specialization of the educational services industry in the municipality. London's location quotient of 1.43 suggests that the educational services industry's contribution to London's economy surpasses the same industry's contribution to the economy of Ontario.

Compared with other municipalities, London had the third highest location quotient result at 1.43 in 2023. According to the Ontario Ministry of Agriculture, Food and Rural Affairs (OMAFRA) interpretation, a location quotient higher than 1.25 is classified as "high". A high location quotient indicates that the educational services industry is serving needs that extend beyond London's boundaries. A high location quotient may also indicate that London has a competitive advantage in that industry, for example, its location, infrastructure, or attributes.

Cambridge had a location quotient less than 1, indicating that the educational services industry's share of this municipality's employment falls short of the same industry's share of total employment in Ontario in 2023. This implies that the educational services industry's contribution to the municipality's economy lags the same industry's contribution to the economy of Ontario.

## Shift-Share Findings

### Industrial Mix Effect Findings

Like other municipalities as presented in Table 5, London's educational services industry had a positive industrial mix effect relative to Ontario between 2022 and 2023. A positive industrial mix effect indicates that the educational services industry in London experienced a higher growth

rate than the overall rate of growth for Ontario. This could be a growth industry with job producing opportunities.

### **Differential Shift Effect Findings**

As illustrated in Table 5, London is one of five municipalities (together with Ottawa, Kitchener, Cambridge, and Hamilton) that had a positive differential shift effect relative to Ontario between 2022 and 2023. A positive differential shift effect suggests that the educational services industry in London experienced a higher rate of growth than Ontario's industry growth rate. Specifically, the positive differential shift effect indicates that local businesses in the industry performed better than businesses in the provincial industry, suggesting that London offers some sort of competitive advantage favoring businesses in the educational services industry.

Municipalities that had a negative differential shift effect for the educational services industry are Toronto, Windsor, Kingston, and Waterloo. A negative differential shift effect indicates that the educational services industry in these municipalities experienced a rate of growth below Ontario's industry growth rate. In other words, the industry does not demonstrate a competitive advantage in the local economy in these municipalities.

### **Shift-Share and Location Quotient Findings Combined**

Based on the Carvalho Classification System of Economic Performance which uses a combination of shift-share and location quotient results, educational services (61) was positioned as a *driving industry* in London between 2022 and 2023. This suggests that London is highly specialized in this sector, which is growing provincially and growing at an even higher rate locally. Other municipalities that have educational services being positioned as a driving industry like London are Ottawa, Kitchener, and Hamilton.

Educational services (61) was positioned as a *promising industry* in Toronto, Windsor, Kingston, and Waterloo. This suggests that these four municipalities had a high specialization in the educational services industry which grew provincially; however, the local growth was slower than the provincial growth in this industry.

Educational services (61) was positioned as a *rising industry* in Cambridge, suggesting relatively low proportion of local employment but will likely increase due to growth in this sector, which is growing provincially and growing at an even higher rate locally.

## **3. Subsector Analysis**

According to Statistics Canada<sup>65</sup>, the educational services sector comprises establishments primarily engaged in providing instruction and training in a wide variety of subjects. The instruction and training are provided by specialized establishments such as schools, colleges, universities, and training centers. These establishments may be privately owned and operated,

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<sup>65</sup> [NAICS 2022 Version 1.0 - 61 - Educational services - Sector \(statcan.gc.ca\)](https://www150.statcan.gc.ca/n1/pub/92-62-001-x/2022001/article/00001-eng.htm)

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 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.

The educational services sector has one subsector: educational services. The detailed analysis of this sub-sector is provided as follows.

### 3.1. Educational Services (611)<sup>66</sup>

This subsector comprises establishments primarily engaged in providing instruction and training in a wide variety of subjects. The instruction and training are provided by specialized establishments such as schools, colleges, universities, and training centers.

The subsector is structured according to the level and type of educational services provided. Elementary and secondary schools, community colleges, Collèges d'enseignement général et professionnel (C.E.G.E.P.s), and universities correspond to a recognized series of formal levels of education designated by diplomas, associate degrees (and equivalent certificates), and degrees. The remaining industry groups are based on the type of instruction or training offered and the levels are not always as formally defined. The establishments are often highly specialized, many offering instruction in a very limited subject matter, for example, ski lessons or one specific type of software.

Within the educational services subsector, the level and types of training that are required of the instructors and teachers vary depending on the industry.

- Total establishments in London (CY) as of December 2023: 142<sup>67</sup>
  - 1 to 4 employees: 55<sup>68</sup>
  - 5 to 9 employees: 25
  - 10 to 19 employees: 27
  - 20 to 49 employees: 18
  - 50 to 99 employees: 5
  - 100 to 199 employees: 3
  - 200 to 499 employees: 3
  - 500 plus employees: 6<sup>69</sup>

<sup>66</sup> NAICS 2022 Version 1.0 - 611 - Educational services - Subsector (statcan.gc.ca)

<sup>67</sup> Industries by Business Location Size « Lightcast Analyst

<sup>68</sup> Industries by Business Location Size « Lightcast Analyst

<sup>69</sup> Thames Valley District School Board; Western University; London District Catholic School Board; Fanshawe College; Conseil scolaire catholique Providence.

- As per data retrieved from Lightcast, in 2022, London had 23,145 jobs in this sub-sector, which was 41% above the national average, and experienced a 4.1% growth between 2022 - 2023, resulting in 24,101 total jobs in 2023 (Lightcast, July 23, 2024).
- London's average wage per job in 2023 in this sub-sector was \$61,637<sup>70</sup>, which was 2.3% lower than Ontario's at \$63,070<sup>71</sup>, and relatively on par with Canada's at \$61,645 (-0.01% difference).

The educational services subsector is comprised of seven industry groups<sup>72</sup>:

- Elementary and secondary schools (6111)
- Community colleges and C.E.G.E.P.s (6112)
- Universities (6113)
- Business schools and computer and management training (6114)
- Technical and trade schools (6115)
- Other schools and instruction (6116)
- Educational support services (6117)

A detailed analysis of these industry groups is provided below.

### 3.1.1. Competitive Analysis Findings for London's Industry Groups in the Educational Services Industry

Table 6 presents the location quotient and shift-share results for industry groups in London Subdivision's educational services industry for 2022 and 2023. Ontario was employed as the reference area.

**Table 6: Location Quotient and Shift-Share Findings of Industry Groups in London's Educational Services Industry (2022 - 2023)**

Industry Groups (4-digit NAICS)	2023 Location Quotient	Shift-Share Industrial Mix Effect	Shift-Share Differential Shift Effect	Position of Industry Group in London
Elementary and secondary schools (6111)	1.02	-106	78	Transitional
Community colleges and C.E.G.E.P.s (6112)	1.77	108	10	Driving
Universities (6113)	2.28	154	-170	Promising
Business schools and computer and management training (6114)	3.49	30	14	Driving
Technical and trade schools (6115)	3.39	20	14	Driving
Other schools and instruction (6116)	0.80	38	-4	Modest
Educational support services (6117)	0.76	14	-1	Modest

Source: Lightcast, Custom Data Analysis – April 5, 2024

<sup>70</sup> [Industry Overview « Lightcast Analyst](#)

<sup>71</sup> [Industry Overview « Lightcast Analyst](#)

<sup>72</sup> [NAICS 2022 Version 1.0 - 611 - Educational services - Subsector \(statcan.gc.ca\)](#)

## Location Quotient Findings

As presented in Table 6, five industry groups in London's educational services industry had a location quotient greater than one in 2023. These industry groups are Elementary and secondary schools (6111); Community colleges and C.E.G.E.P.s (6112); Universities (6113); Business schools and computer and management training (6114); and Technical and trade schools (6115). A location quotient higher than one points to the concentration or specialization of the industry group in the region<sup>73</sup>. For example, the location quotient of 2.28 for Universities (6113) suggests that the industry group's contribution to London's economy surpassed the same industry group's contribution to the economy of Ontario.

Other industry groups (Other schools and instruction (6116) and Educational support services (6117)) had a location quotient less than one. This suggests that the industry group's share of London's employment falls short of the same industry group's share of total employment in Ontario. This implies that the industry group's contribution to London's economy lags the same industry group's contribution to the economy of Ontario.

Compared to other industry groups, in 2023 Business schools and computer and management training (6114) had the highest location quotient at 3.49, followed by Technical and trade schools (6115) at 3.39, Universities (6113) at 2.28, and Community colleges and C.E.G.E.P.s (6112) at 1.77. According to the Ontario Ministry of Agriculture, Food and Rural Affairs (OMAFRA) interpretation, a location quotient higher than 1.25 is classified as "high". A high location quotient indicates that the four industry groups noted above are serving needs that extend beyond London's boundaries. A high location quotient may also indicate that London has a competitive advantage in these industry groups, for example, its location, infrastructure, or attributes.

## Shift-Share Findings

### Industrial Mix Effect Findings

As presented in Table 6, six industry groups in London's educational services industry had a positive industrial mix effect relative to Ontario between 2022 and 2023. These industry groups are Community colleges and C.E.G.E.P.s (6112); Universities (6113); Business schools and computer and management training (6114); Technical and trade schools (6115); Other schools and instruction (6116); and Educational support services (6117). A positive industrial mix effect indicates that the industry group in London experienced a growth rate higher than the overall rate of growth for Ontario. This may be a growth industry group with job producing opportunities.

One industry group (Elementary and secondary schools (6111)) had a negative industrial mix effect relative to Ontario between 2022 and 2023. A negative industrial mix effect indicates that the industry group in London's educational services industry experienced a growth rate below Ontario's overall rate of growth.

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<sup>73</sup> Economic Development Information System – Guide one: Performing a Community Competitive Analysis (page 17). This guide was prepared by the Niagara Economic and Tourism Corporation in partnership with Bell Canada Inc.

## Differential Shift Effect Findings

As illustrated in Table 6, four industry groups in London's educational services industry had a positive differential shift effect relative to Ontario for 2022 and 2023. These industry groups are Elementary and secondary schools (6111); Community colleges and C.E.G.E.P.s (6112); Business schools and computer and management training (6114); and Technical and trade schools (6115). A positive differential shift effect suggests that the industry group in London experienced a higher rate of growth than Ontario's industry group growth rate. Specifically, the positive differential shift effect indicates that London's businesses in the four industry groups performed better than Ontario's businesses in these four industry groups. It suggests that London offered some sort of competitive advantage favoring businesses in in these four industry groups.

Other industry groups (Universities (6113); Other schools and instruction (6116); and Educational support services (6117)) had a negative differential shift effect. A negative differential shift effect indicates that the industry group in London experienced a rate of growth below Ontario's industry group growth rate. In other words, these industry groups do not demonstrate a competitive advantage in the local economy.

## Shift-Share and Location Quotient Findings Combined

Based on the Carvalho Classification System of Economic Performance which uses a combination of shift-share and location quotient results, Elementary and secondary schools (6111) were positioned as a *transitional industry group* in London. This suggests London had an average specialization in this industry group which grew provincially at a slower rate than the overall growth; however, London's growth exceeded the provincial growth in this industry group.

Community colleges and C.E.G.E.P.s (6112); Business schools and computer and management training (6114); and Technical and trade schools (6115) were positioned as *driving industry groups* in London. This suggests that London was highly specialized in these industry groups, which were growing provincially and growing at an even higher rate locally.

Universities (6113) was positioned as a *promising industry group*, which suggests high local specialization in this industry group that grew provincially; London's growth was slower than provincial growth in this industry group.

Other schools and instruction (6116) and Educational support services (6117) were positioned as *modest industry groups*, which suggests London had relatively slow specialization in these industry groups which grew provincially; London's growth was slower than provincial growth in these industry groups.

### 3.1.2. Industry Group Analysis

#### a. Elementary and Secondary Schools (6111)<sup>74</sup>

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<sup>74</sup> [NAICS 2022 Version 1.0 - 6111 - Elementary and secondary schools - Industry group \(statcan.gc.ca\)](https://www150.statcan.gc.ca/n1/pub/28-661-x/2022001/article/00001-eng.htm)

This industry group comprises establishments primarily engaged in providing academic courses that comprise a basic preparatory education, that is, Kindergarten to Grade 12<sup>75</sup>.

- Total establishments in London (CY) as of December 2023: 16<sup>76</sup>
  - 1 to 4 employees: 2<sup>77</sup>
  - 5 to 9 employees: 1
  - 10 to 19 employees: 4
  - 20 to 49 employees: 7
  - 50 to 99 employees: 0
  - 100 to 199 employees: 0
  - 200 to 499 employees: 0
  - 500 plus employees: 2
- As per data retrieved from Lightcast, London had 9,235<sup>78</sup> jobs in 2022 in the elementary and secondary schools' industry group, which was 5% below the national average. Between 2022-2023 there was a 2.2%<sup>79</sup> increase in the number of jobs in this industry group, resulting in 9,435<sup>80</sup> jobs in 2023 (Lightcast, November 1, 2024).
- London's average wage per job for this industry group in 2023 was \$66,580<sup>81</sup> which was 5.4% higher than Canada's at \$63,163, and 0.8% lower than Ontario's at \$67,103<sup>82</sup> (Lightcast, November 1, 2024).

## **b. Community Colleges and C.E.G.E.P.s (6112)**

This industry group comprises establishments primarily engaged in providing academic, or academic and technical courses and granting associate degrees, certificates or diplomas that are below the university level. The requirement for admission to an associate or equivalent degree program is at least a high school diploma or equivalent general academic training<sup>83</sup>.

- Total establishments in London (CY) as of December 2023: 4<sup>84</sup>
  - 1 to 4 employees: 1<sup>85</sup>
  - 5 to 9 employees: 0
  - 10 to 19 employees: 0
  - 20 to 49 employees: 0
  - 50 to 99 employees: 1
  - 100 to 199 employees: 0
  - 200 to 499 employees: 1

<sup>75</sup> [NAICS 2022 Version 1.0 - 6111 - Elementary and secondary schools - Industry group \(statcan.gc.ca\)](https://www150.statcan.gc.ca/n1/pub/92-629-x/2022001/article/00001-eng.htm)

<sup>76</sup> [Industries by Business Location Size « Lightcast Analyst](#)

<sup>77</sup> [Industries by Business Location Size « Lightcast Analyst](#)

<sup>78</sup> [Industry Overview « Lightcast Analyst](#)

<sup>79</sup> [Industry Overview « Lightcast Analyst](#)

<sup>80</sup> [Industry Overview « Lightcast Analyst](#)

<sup>81</sup> [Industry Overview « Lightcast Analyst](#)

<sup>82</sup> [Industry Overview « Lightcast Analyst](#)

<sup>83</sup> [NAICS 2022 Version 1.0 - 6112 - Community colleges and C.E.G.E.P.s - Industry group \(statcan.gc.ca\)](https://www150.statcan.gc.ca/n1/pub/92-629-x/2022001/article/00001-eng.htm)

<sup>84</sup> [Industries by Business Location Size « Lightcast Analyst](#)

<sup>85</sup> [Industries by Business Location Size « Lightcast Analyst](#)

- 500 plus employees: 1
- As per data retrieved from Lightcast, London had 2,702<sup>86</sup> jobs in 2022 in the community colleges and C.E.G.E.P.s industry group, which was 78% above the national average. Between 2022-2023 there was an 8.8%<sup>87</sup> increase in the number of jobs in this industry group, resulting in 2,939<sup>88</sup> jobs in 2023 (Lightcast, November 1, 2024).
- London's average wage per job for this industry group in 2023 was \$61,375<sup>89</sup> which was 3.6% lower than Canada's at \$63,647, and 1.2% lower than Ontario's at \$62,138<sup>90</sup> (Lightcast, November 1, 2024).

### c. Universities (6113)

This industry group comprises establishments primarily engaged in providing academic courses and granting degrees at the bachelor or graduate levels. The requirement for admission is at least a high school diploma or equivalent general academic training for baccalaureate programs, and often a baccalaureate degree for professional or graduate programs<sup>91</sup>.

- Total establishments in London (CY) as of December 2023: 5<sup>92</sup>
  - 1 to 4 employees: 0
  - 5 to 9 employees: 0
  - 10 to 19 employees: 0
  - 20 to 49 employees: 1<sup>93</sup>
  - 50 to 99 employees: 0
  - 100 to 199 employees: 0
  - 200 to 499 employees: 2
  - 500 plus employees: 2
- As per data retrieved from Lightcast, London in 2022 had 9,524<sup>94</sup> jobs in the universities industry group, which was 143%<sup>95</sup> above the national average. Between 2022-2023 there was a 3.9%<sup>96</sup> increase in the number of jobs in this industry group, resulting in 9,899<sup>97 98</sup> jobs in 2023 (Lightcast, November 1, 2024).

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<sup>86</sup> [Industry Overview « Lightcast Analyst](#)

<sup>87</sup> [Industry Overview « Lightcast Analyst](#)

<sup>88</sup> [Industry Overview « Lightcast Analyst](#)

<sup>89</sup> [Industry Overview « Lightcast Analyst](#)

<sup>90</sup> [Industry Overview « Lightcast Analyst](#)

<sup>91</sup> [NAICS 2022 Version 1.0 - 6113 - Universities - Industry group \(statcan.gc.ca\)](#)

<sup>92</sup> [Industries by Business Location Size « Lightcast Analyst](#)

<sup>93</sup> [Industries by Business Location Size « Lightcast Analyst](#)

<sup>94</sup> [Industry Overview « Lightcast Analyst](#)

<sup>95</sup> [Industry Overview « Lightcast Analyst](#)

<sup>96</sup> [Industry Overview « Lightcast Analyst](#)

<sup>97</sup> [Industry Overview « Lightcast Analyst](#)

<sup>98</sup> [Industry Table « Lightcast Analyst](#)

- London's average wage per job for this industry group in 2023 was \$60,511<sup>99</sup> which was 6.7% lower than Canada's at \$64,853, and 4.5% lower than Ontario's at \$63,350<sup>100</sup> (Lightcast, November 1, 2024).

#### **d. Business Schools and Computer and Management Training (6114)**

This industry group comprises establishments primarily engaged in providing courses in office procedures and secretarial and stenographic skills; conducting training in all phases of computer activities, including computer programming, software packages, computerized business systems, computer electronics technology, computer operations and local area network management; and offering an array of short-duration courses and seminars for management and professional development<sup>101</sup>.

- Total establishments in London (CY) as of December 2023: 14<sup>102</sup>
  - 1 to 4 employees: 11<sup>103</sup>
  - 5 to 9 employees: 1
  - 10 to 19 employees: 1
  - 20 to 49 employees: 0
  - 50 to 99 employees: 0
  - 100 to 199 employees: 0
  - 200 to 499 employees: 0
  - 500 plus employees: 1
- As per data retrieved from Lightcast, London had 397<sup>104</sup> jobs in 2022 in the business schools and computer and management training industry group, which was 340%<sup>105</sup> above the national average. Between 2022-2023 there was a 12.8%<sup>106</sup> increase in the number of jobs in this industry group, resulting in 448<sup>107</sup> 108 jobs in 2023 (Lightcast, November 1, 2024).
- London's average wage per job for this industry group in 2023 was \$66,944<sup>109</sup> which was 1.2% higher than Canada's at \$66,124, and 2.0% higher than Ontario's at \$65,642<sup>110</sup> (Lightcast, November 1, 2024).

#### **e. Technical and Trade Schools (6115)**

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<sup>99</sup> [Industry Overview « Lightcast Analyst](#)

<sup>100</sup> [Industry Overview « Lightcast Analyst](#)

<sup>101</sup> [NAICS 2022 Version 1.0 - 6114 - Business schools and computer and management training - Industry group \(statcan.gc.ca\)](#)

<sup>102</sup> [Industries by Business Location Size « Lightcast Analyst](#)

<sup>103</sup> [Industries by Business Location Size « Lightcast Analyst](#)

<sup>104</sup> [Industry Overview « Lightcast Analyst](#)

<sup>105</sup> [Industry Overview « Lightcast Analyst](#)

<sup>106</sup> [Industry Overview « Lightcast Analyst](#)

<sup>107</sup> [Industry Overview « Lightcast Analyst](#)

<sup>108</sup> [Industry Table « Lightcast Analyst](#)

<sup>109</sup> [Industry Overview « Lightcast Analyst](#)

<sup>110</sup> [Industry Overview « Lightcast Analyst](#)

This industry group comprises establishments primarily engaged in providing vocational and technical training in a variety of technical subjects and trades. The training often leads to non-academic certification. Vocational correspondence schools are also included<sup>111</sup>.

- Total establishments in London (CY) as of December 2023: 5<sup>112</sup>
  - 1 to 4 employees: 1<sup>113</sup>
  - 5 to 9 employees: 0
  - 10 to 19 employees: 2
  - 20 to 49 employees: 0
  - 50 to 99 employees: 2
  - 100 to 199 employees: 0
  - 200 to 499 employees: 0
  - 500 plus employees: 0
- As per data retrieved from Lightcast, London in 2022 had 321<sup>114</sup> jobs in the technical and trade schools' industry group, which was 88%<sup>115</sup> above the national average. Between 2022-2023 there was an 8.4%<sup>116</sup> increase in the number of jobs in this industry group, resulting in 348<sup>117 118</sup> jobs in 2023 (Lightcast, data retrieved on November 1, 2024).
- London's average wage per job for this industry group in 2023 was \$57,079<sup>119</sup> which was 2.4% higher than Canada's at \$55,755, and 3.3% higher than Ontario's at \$55,272<sup>120</sup> (Lightcast, data retrieved on November 1, 2024).

## **f. Other Schools and Instruction (6116)**

This industry group comprises establishments primarily engaged in providing instruction in fine arts; athletics and sports; languages; and other instruction (except academic, business, computer, management, and technical and trade instruction); and providing services, such as tutoring and exam preparation<sup>121</sup>.

- Total establishments in London (CY) as of December 2023: 84<sup>122</sup>
  - 1 to 4 employees: 32<sup>123</sup>
  - 5 to 9 employees: 19
  - 10 to 19 employees: 19
  - 20 to 49 employees: 10

<sup>111</sup> [NAICS 2022 Version 1.0 - 6115 - Technical and trade schools - Industry group \(statcan.gc.ca\)](#)

<sup>112</sup> [Industries by Business Location Size « Lightcast Analyst](#)

<sup>113</sup> [Industries by Business Location Size « Lightcast Analyst](#)

<sup>114</sup> [Industry Overview « Lightcast Analyst](#)

<sup>115</sup> [Industry Overview « Lightcast Analyst](#)

<sup>116</sup> [Industry Overview « Lightcast Analyst](#)

<sup>117</sup> [Industry Overview « Lightcast Analyst](#)

<sup>118</sup> [Industry Table « Lightcast Analyst](#)

<sup>119</sup> [Industry Overview « Lightcast Analyst](#)

<sup>120</sup> [Industry Overview « Lightcast Analyst](#)

<sup>121</sup> [NAICS 2022 Version 1.0 - 6116 - Other schools and instruction - Industry group \(statcan.gc.ca\)](#)

<sup>122</sup> [Industries by Business Location Size « Lightcast Analyst](#)

<sup>123</sup> [Industries by Business Location Size « Lightcast Analyst](#)

- 50 to 99 employees: 2
- 100 to 199 employees: 2
- 200 to 499 employees: 0
- 500 plus employees: 0
- As per data retrieved from Lightcast, London had 776<sup>124</sup> jobs in 2022 in the other schools and instruction industry group, which was 15%<sup>125</sup> below the national average. Between 2022-2023 there was a 9.4% increase in the number of jobs in this industry group, resulting in 849<sup>126 127</sup> jobs in 2023 (Lightcast, November 1, 2024).
- London's average wage per job for this industry group in 2023 was \$26,375<sup>128</sup> which was 18.4% lower than Canada's at \$32,323<sup>129</sup>, and 15.1% lower than Ontario's at \$31,076<sup>130</sup> (Lightcast, November 1, 2024).

## g. Educational Support Services (6117)

This industry group comprises establishments primarily engaged in providing non-instructional services that support educational processes or systems<sup>131</sup>.

- Total establishments in London (CY) as of December 2023: 14<sup>132</sup>
  - 1 to 4 employees: 8<sup>133</sup>
  - 5 to 9 employees: 4
  - 10 to 19 employees: 1
  - 20 to 49 employees: 0
  - 50 to 99 employees: 0
  - 100 to 199 employees: 1
  - 200 to 499 employees: 0
  - 500 plus employees: 0
- As per data retrieved from Lightcast, London had 189<sup>134</sup> jobs in 2022 in the educational support services industry group, which was 6% above the national average. Between 2022-2023 there was a 2.6% decrease in the number of jobs in this industry group, resulting in 184<sup>135 136</sup> jobs in 2023 (Lightcast, November 1, 2024).

<sup>124</sup> [Industry Overview « Lightcast Analyst](#)

<sup>125</sup> [Industry Overview « Lightcast Analyst](#)

<sup>126</sup> [Industry Overview « Lightcast Analyst](#)

<sup>127</sup> [Industry Table « Lightcast Analyst](#)

<sup>128</sup> [Industry Overview « Lightcast Analyst](#)

<sup>129</sup> [Industry Overview « Lightcast Analyst](#)

<sup>130</sup> [Industry Overview « Lightcast Analyst](#)

<sup>131</sup> [NAICS 2022 Version 1.0 - 6117 - Educational support services - Industry group \(statcan.gc.ca\)](#)

<sup>132</sup> [Industries by Business Location Size « Lightcast Analyst](#)

<sup>133</sup> [Industries by Business Location Size « Lightcast Analyst](#)

<sup>134</sup> [Industry Overview « Lightcast Analyst](#)

<sup>135</sup> [Industry Overview « Lightcast Analyst](#)

<sup>136</sup> [Industry Table « Lightcast Analyst](#)

- London's average wage per job for this industry group in 2023 was \$31,283<sup>137</sup> which was 37.3% lower than Canada's at \$49,882, and 38.2% lower than Ontario's at \$50,630<sup>138</sup> (Lightcast, November 1, 2024).

## 4. SWOT Analysis of London's Educational Services Sector

### 4.1. Strengths

#### 4.1.1. Presence of World-class Educational Institutions

- London is home to world-class educational institutions such as Western University, including its Ivey Business School and Schulich School of Medicine and Dentistry. It also has Fanshawe College, one of the largest colleges in Ontario, and Western's two affiliate university colleges, Huron University College and King's University College. The presence of these educational institutions has a significant economic impact on London's economy by creating jobs and attracting research funding from government, industry, donors, and internal sources<sup>139</sup>.
  - Western has a substantial presence in the London area, being the largest employer and supporting the local economy with a budget exceeding \$1.618 billion in 2023-2024<sup>140</sup>. Western University is ranked among the top 1% of higher education institutions worldwide. It is a founding member of the U15, Canada's group of most distinguished research universities<sup>141</sup>. In 2022, Western Education was recognized as one of the top faculties of education in the world by two international organizations - Times Higher Education World University Rankings and Shanghai Ranking, 2022 Global Ranking of Academic Subjects<sup>142</sup>.
  - Ivey Business School has earned an international reputation for its teaching and research excellence and the high caliber of its students and faculty. For nine years, Bloomberg Businessweek has ranked Ivey the No. 1 MBA program in Canada (2014-2019, 2022-2024). Renowned for its Case-Method of Learning, Ivey Business School is one of the two most important producers of business cases in the world, alongside Harvard<sup>143</sup>.
  - Fanshawe is a \$1.6 billion economic driver to London and the surrounding region<sup>144</sup>. Fanshawe has approximately 43,000 students and provides over 220 higher

<sup>137</sup> [Industry Overview « Lightcast Analyst](#)

<sup>138</sup> [Industry Overview « Lightcast Analyst](#)

<sup>139</sup> [WesternU Economic Impact Summary 2015.pdf \(uwo.ca\)](#)

<sup>140</sup> Western Constituent University's total revenue (all sources of funding) was \$1.618 Billion in 2023-24. Data received from Western via email on October 3, 2024.

<sup>141</sup> [Facts & Figures - Western University \(uwo.ca\)](#)

<sup>142</sup> [Global leader in education - Faculty of Education - Western University \(uwo.ca\)](#)

<sup>143</sup> [Quick Facts | Ivey Business School \(uwo.ca\)](#)

<sup>144</sup> [Capital Project Innovation Village Overview - Fanshawe College \(fanshawefoundation.ca\); Archived - 2017-20 Strategic Mandate Agreement: Fanshawe College of Applied Arts and Technology | ontario.ca](#)

education programs<sup>145</sup> across many disciplines, including arts, media, design, technology and skilled trades, business, information technology, culinary, health and human services<sup>146</sup>.

### 4.1.2. Skilled Workforce and High Employment Rate

#### High employment rates after graduation

- Western University and Fanshawe College offer a range of programs, providing a steady supply of skilled professionals for London with high employment rates. Both Western University and Fanshawe College have higher employment rates after graduation than the provincial average of 85.8%<sup>147</sup> (as of April 11, 2024). Western University has a 92.3% employment rate six months after graduation<sup>148</sup>. At Fanshawe College, 89.7% of graduates are successful in finding employment within six months of graduating<sup>149</sup>.

#### Available and experienced local workforce

London provides access to an available and experienced local workforce with the talent and skills needed to support the educational services sector.

- In 2021, there were 18,195<sup>150</sup> people employed in London's educational services industry (as per London Subdivision), comprising 9.8%<sup>151</sup> of London's total workforce, which is higher than Ontario (7.5%)<sup>152</sup> and Canada (7.7%)<sup>153</sup>. In Ontario, the educational services industry comprised 7.5% of the provincial workforce in 2021, with 487,940<sup>154</sup> people employed. In Canada, 7.7% of the overall workforce was employed in the educational services industry.
- In 2022 there were 23,145<sup>155</sup> employed in the educational services sector in London, which was 41% above the national average. The sector grew by 4.1% between 2022 and 2023, to 24,101, and was the third-largest industry in London, making up 11.1% of the total workforce (Lightcast<sup>156</sup>, November 1, 2024).

<sup>144</sup> [The Fanshawe Advantage | Fanshawe College](#)

<sup>145</sup> [The Fanshawe Advantage | Fanshawe College](#)

<sup>146</sup> [About Fanshawe | Fanshawe College](#)

<sup>147</sup> [The Fanshawe Advantage | Fanshawe College](#)

<sup>148</sup> [Facts & Figures 2021-2022 - Western University \(uwo.ca\)](#)

<sup>149</sup> [The Fanshawe Advantage | Fanshawe College](#)

<sup>150</sup> [Add/Remove data - Place of work status by industry sectors, occupation broad category and gender: Canada, provinces and territories, census divisions and census subdivisions \(statcan.gc.ca\)](#)

<sup>151</sup> [Add/Remove data - Place of work status by industry sectors, occupation broad category and gender: Canada, provinces and territories, census divisions and census subdivisions \(statcan.gc.ca\)](#)

<sup>152</sup> [Add/Remove data - Place of work status by industry sectors, occupation broad category and gender: Canada, provinces and territories, census divisions and census subdivisions \(statcan.gc.ca\)](#)

<sup>153</sup> [Add/Remove data - Place of work status by industry sectors, occupation broad category and gender: Canada, provinces and territories, census divisions and census subdivisions \(statcan.gc.ca\)](#)

<sup>154</sup> [Add/Remove data - Place of work status by industry sectors, occupation broad category and gender: Canada, provinces and territories, census divisions and census subdivisions \(statcan.gc.ca\)](#)

<sup>155</sup> [Industry Overview « Lightcast Analyst](#)

<sup>156</sup> [Highest Ranked Industries « Lightcast Analyst](#)

- Employment by industry as based on the CMA data in the educational services sector was 21,300 in 2019<sup>157</sup>, pre-pandemic. In 2022, when all mask mandates, travel restrictions and capacity limits were lifted, employment was 28,200 (+32.4% from 2019) in the London Census Metropolitan Area.

### 4.1.3. Collaboration and Innovation

London is home to world-class educational institutions such as Western University, including its Ivey Business School and Schulich School of Medicine and Dentistry, as well as one of Ontario's largest colleges (Fanshawe College). The collaboration between academia and industry drives innovation and improvement in different sectors, as illustrated in the following examples.

- BioNext, Western University's MedTech Incubator, is driving medical technology innovation and facilitating the commercialization of groundbreaking concepts. The collaboration between BioNext and the Morrisette Institute for Entrepreneurship ensures that entrepreneurs receive both scientific and business support, addressing the challenges specific to the complicated and regulated field of Medical Technology (LEDC, July 24, 2023)<sup>158</sup>.
- Western Research Parks, one of Canada's leading science and technology parks, is the catalyst for commercialization, partnership development, research translation, and entrepreneurial learning opportunities at Western University. For over three decades, Western Research Parks has served as a strong link between academics and commerce and is a key contributor to the movement of an idea or a discovery from concept to the marketplace. Established in 1989, the Western Research Parks program now includes three locations on a total of 156 acres: Western Discovery Park, located adjacent to Western University; Western Advanced Manufacturing Park, located alongside Highway 401; and Western Sarnia-Lambton Research Park, located south of Highway 402 in Lambton County<sup>159</sup>. Dozens of companies choose to locate at Western Research Parks' two London, Ontario, campuses. They employ 732 workers and contribute an estimated \$55 million to the London, Ontario community every year. Western Research Parks have maintained an occupancy rate over above 92%, with 55 companies<sup>160</sup>.
- Western Advanced Manufacturing Park<sup>161</sup> was the result of a unique partnership between Western University, Fanshawe College, and the City of London to ensure the repetitive and continuous competitive advantage for regional industry and economic growth. With an array of globally unique facilities, strong industry partnerships, and with ample room to grow and develop new technologies, Western Advanced Manufacturing Park aims to empower collaboration between the leading-edge research and manufacturing, entrepreneur, and investment partners to rapidly generate high technology, manufacturing innovations, and advanced solutions.

<sup>157</sup> [Employment by industry, census metropolitan areas, annual \(statcan.gc.ca\)](https://www150.statcan.gc.ca/n1/pub/28-263-x/2020001/article/00001-eng.htm)

<sup>158</sup> [Driving Innovation: BioNext MedTech Incubator Spearheads Entrepreneurial Ventures in London | London Economic Development Corporation \(ledc.com\)](https://www.ledc.com/en/development-corporation/development-corporation)

<sup>159</sup> [Welcome to Western Research Parks, or Explore Western Research Parks](https://www.westernu.ca/research-parks)

<sup>160</sup> [Western Research Parks inspires innovation - Western News \(westernu.ca\)](https://www.westernu.ca/news/2024/03/western-research-parks-inspires-innovation), additional data received from Western via email on October 3, 2024.

<sup>161</sup> [The Park - Western Advanced Research Park \(westernadvancedmanufacturingpark.ca\)](https://westernadvancedmanufacturingpark.ca/)

- In February 2024, Fanshawe College's Centre for Research and Innovation (CRI) was awarded a grant of \$2,250,000 from the Natural Sciences and Engineering Research Council of Canada (NSERC) Mobilize program, as part of the College and Community Innovation (CCI) initiative. This significant funding will play a crucial role in advancing Fanshawe's commitment to fostering innovation and addressing the evolving needs of the regional labour market. The grant will be utilized to achieve several key objectives including enhancing access to innovation services; skills development for students; advancing equity, diversity, and inclusion (EDI) in research; support for key industries in London, Ontario; capacity building in strategic sectors; and creating new partnerships<sup>162</sup>.
- In 2022, Western's Morrisette Institute for Entrepreneurship created a free online program for aspiring entrepreneurs, in collaboration with RBC Future Launch and The Globe and Mail. The Founder's Journey, an Entrepreneurial Process is an eight-module course taught by Ivey Business School professors and lecturers, guiding participants through the step-by-step process of nurturing and growing a new venture<sup>163</sup>. The program provides a formal educational opportunity for Canadians looking for an affordable eLearning solution to develop basic entrepreneurship and business skills.

#### 4.1.4. Strong Education System and Major Employers

In London, students can learn at Canada's top schools and receive an education that will take them further in their career. From the primary to the post-secondary level, London offers the next generation of talent a world-class education<sup>164</sup>.

##### Public Primary and Secondary Schools

- London has four public school boards, including the [Thames Valley District School Board](#), [London District Catholic School Board](#), [Conseil scolaire Viamonde](#), and [Conseil scolaire catholique Providence](#), which offer a variety of elementary, secondary, and continuing/adult education options<sup>165</sup>.
- London also has more than 20 registered private schools from junior kindergarten through to high school. Many are geared to specific cultures and religions, including the [Al-Taqwa Islamic School](#), [London Community Hebrew Day School](#), the [Montessori Academy of London](#), and other English as second language schools<sup>166</sup>.

##### Post-Secondary

- Over 88,000<sup>167</sup> students choose to learn in London every year at one of the post-secondary institutions.

<sup>162</sup> [Centre for Research and Innovation secures \\$2,250,000 research grant from NSERC | Fanshawe College](#)

<sup>163</sup> [Western, RBC, The Globe and Mail team up to offer free program for aspiring entrepreneurs - Western News \(westernu.ca\)](#)

<sup>164</sup> [Learning in London | London Economic Development Corporation \(ledc.com\)](#)

<sup>165</sup> [Learning in London | London Economic Development Corporation \(ledc.com\)](#)

<sup>166</sup> [Learning in London | London Economic Development Corporation \(ledc.com\)](#)

<sup>167</sup> This 2023-2024 enrollment number contains Western (including the former Brescia) at 40,676, Huron at 1,788, King's at 3,307, and Fanshawe at 43,000. Data received on October 3, 2024, via email from Western.

- Considered Canada's most beautiful campus, [Western University](#) offers 400+ combinations of undergraduate majors, minors, and specializations and another 160 graduate degree programs and collaborative specializations, including a range of interdisciplinary programs, to its 40,676<sup>168</sup> undergraduates and postgraduates every year. There are 372,481 Western alumni living in 160 countries around the world<sup>169</sup>. Western is known for its medical, dental, engineering, programs, and research capabilities, in addition to areas of focus at its affiliate colleges:
  - [Huron University College](#) - A liberal arts university college known for its art, social science, and theology programs.
  - [King's University College](#) - A liberal arts university college known for its childhood and social institutions, social science, and social work programs<sup>170</sup>.
- Western is home to Ivey Business School, one of the top business schools in the world known for its business programs which offers a case-study method of learning<sup>171</sup>.
- As one of the largest colleges in Ontario, Fanshawe College welcomes more than 43,000 students each year and offers over 220 programs across campuses in London, St. Thomas, Woodstock and Simcoe. With over 250,000 alumni, 89.7% of Fanshawe graduates find employment within six months, ranking well above the provincial average of 85.8%<sup>172</sup>.
- London is also home to Collège Boréal, Ontario Institute of Audio Recording Technology (OIART), Westervelt College, and triOS College<sup>173</sup>.
  - The Ontario Institute of Audio Recording Technology (OIART) is a private career college in London. The institute trains audio engineers for a variety of careers in music production, recording arts, audio engineering, sound recording, and related fields. Founded in 1983 by engineer and producer Paul Steenhuis, the college focuses solely on sound. OIART has been described as "prestigious" and as "the Harvard of Audio Engineering" and attracts students from around the world. OIART has the largest full-time faculty of any audio school in Canada<sup>174</sup>.

## Corporate Training and Continuing Education Institutions

- The city also offers corporate training and continuing education institutions such as the [Ivey Academy](#), [Fanshawe Corporate Training Solutions](#), [Western Continuing Studies](#). Additionally, there are also several learning and continuing education options at the [Thames Valley District School Board's GA Wheable Centre for Adult Education](#), the [London District Catholic School Board's St. Patrick Adult + Continuing Education Centre](#), and various professional development organizations.

<sup>168</sup> The number includes Western and the former Brescia University College. Data received on October 3, 2024, via email from Western.

<sup>169</sup> <https://www.uwo.ca/about/whoweare/facts.html>.

<sup>170</sup> [Learning in London | London Economic Development Corporation \(ledc.com\)](#)

<sup>171</sup> [Learning in London | London Economic Development Corporation \(ledc.com\)](#)

<sup>172</sup> Data retrieved from Fanshawe College on August 15, 2024.

<sup>173</sup> [Learning in London | London Economic Development Corporation \(ledc.com\)](#)

<sup>174</sup> [Ontario Institute of Audio Recording Technology - Wikipedia](#)

## Major Employers

### Western University

- Founded in 1878, Western University in London, Ontario is one of Canada's leading research-intensive universities, combining academic excellence with life-long opportunities for intellectual, social, and cultural growth in the arts, humanities, engineering, sciences, health sciences, social sciences, business, and law. With research collaborations on every continent and students and faculty trained far and wide, Western is actively engaged internationally.

### Western University - Facts & Figures<sup>175</sup> (2023 - 2024):

- Western Constituent University's total revenue (all sources of funding) was \$1.618 billion in 2023-24<sup>176</sup>.
- Land area: 495.7 hectares.
- World-ranked: Western is ranked among the top 1% of higher education institutions worldwide (Center for World University Rankings 2023)<sup>177</sup>.
- Research-intensive: Western is a founding member of the U15, Canada's group of most distinguished research universities.
- Global campus: Western's 40,676<sup>178</sup> students include more than 4,690 international students from 126 countries.
- Top students: One of Canada's top entrance averages for first-year students at 91.8%<sup>179</sup>.
- High retention rate: One of Canada's highest first to second year retention rate at 92.5%<sup>180</sup>.
- Research impact: \$278.58 million in research funding\* and 7,108 papers published by Western researchers in 2023.
- Prestigious scholars: Western has had 24 Rhodes Scholars, 83 Fellows of the Royal Society of Canada, and has 68 active Canada Research Chairs.
- Comprehensive academics: 11 faculties including professional programs in medicine, business, law and engineering, plus the School of Graduate & Postdoctoral Studies.
- Tailored programs: 400+ combinations of undergraduate majors, minors, and specializations.
- Diverse graduate offerings: 160 graduate degree programs and collaborative specializations, including a range of interdisciplinary programs.
- Solid career outcomes: 92.3% employment rate six months after graduation<sup>181</sup>.
- International reach: Over 372,481 alumni in 160 countries worldwide.
- Western operates the largest student housing system in the province and second largest in the country<sup>182</sup>.

<sup>175</sup> [Facts & Figures - Western University \(uwo.ca\)](#)

<sup>176</sup> Data received on October 3, 2024, via email from Western.

<sup>177</sup> [About Western - Western University \(uwo.ca\)](#)

<sup>178</sup> This includes the former Brescia University College, now integrated into Western. Data received on October 3, 2024, via email from Western.

<sup>179</sup> 2022-23 data, [Facts & Figures - Western University](#)

<sup>180</sup> 2022-23 data, [Facts & Figures - Western University](#)

<sup>181</sup> May 2023 data, [Facts & Figures - Western University](#)

<sup>182</sup> [Western University building 770-student residence on Richmond Street | London Free Press \(lfpres.com\)](#)

## Fanshawe College

- Fanshawe is one of the largest colleges in Ontario, with campuses in London, Simcoe, St. Thomas, and Woodstock, with additional locations in Huron and Bruce counties. Fanshawe attracts students from more than 100 countries every year, offering a world of possibility through more than 220 higher education programs<sup>183</sup> across many disciplines, including arts, media, design, technology and skilled trades, business, information technology, culinary, health and human services<sup>184</sup>. Fanshawe is a leading provider of skilled trades and apprenticeship training in Ontario's college system, with more than 5,000 students studying in 40+ apprenticeship programs each year<sup>185</sup>.
- Fanshawe plays an important role in providing re-skilling and skill upgrading opportunities for mature learners through the design and delivery of custom training for federally and provincially sponsored trainees, community organizations, sectoral training councils and private sector employers in the business, health, industrial and services sectors<sup>186</sup>.
- Fanshawe's powerful post-graduate results (as of April 15, 2024):
  - Graduation rate: 66.4%<sup>187</sup> - Percent of full-time students who entered a program of instruction in an enrolment year and graduated within a specified period. Provincial Average: 65%
  - Graduate satisfaction: 77.1% - Percent of graduate satisfaction six months after graduation with the usefulness of their college education in achieving post-graduate goals. Provincial Average: 76.8%
  - Employment rate: 89.7% - Percent of graduates that are successful in finding employment within six months of graduating. Provincial Average: 85.8%
- In January 2024, Fanshawe opened Innovation Village, a 95,000-square-foot centre of creativity and collaboration located in the heart of the London Campus. The state-of-the-art space features collaborative workspaces, virtual reality and multimedia labs, and cutting-edge equipment aimed at facilitating hands-on learning, creative exploration, and complex problem-solving amongst students, faculty, and industry partners<sup>188</sup>.

## Thames Valley District School Board (TVDSB)

- Thames Valley is the fourth largest public-school board in Ontario<sup>189</sup>, serving an area that stretches more than 200 kilometers and across more than 7,000 square kilometers<sup>190</sup>. Thames Valley has 14,000 employees. TVDSB administers 131 elementary and 27 secondary schools, with the enrolment of 84,400 elementary students and secondary students<sup>191</sup>.

<sup>183</sup> [The Fanshawe Advantage | Fanshawe College](#)

<sup>184</sup> [About Fanshawe | Fanshawe College](#)

<sup>185</sup> [The Don Crich Skilled Trades Accelerator | Fanshawe College](#)

<sup>186</sup> [About Fanshawe | Fanshawe College](#)

<sup>187</sup> [The Fanshawe Advantage | Fanshawe College](#)

<sup>188</sup> [About Fanshawe | Fanshawe College](#)

<sup>189</sup> [About Us - TVDSB](#)

<sup>190</sup> [Facts about Thames Valley - TVDSB](#)

<sup>191</sup> Data retrieved from TVDSB via email on September 12, 2024.

**Table 7: Top Employers in London's Educational Services Sector with more than 100 Employees****Post-Secondary Schools**

Employers	Employees	Brief Summary
Fanshawe College	3,514 (both full-time and part-time employees) <sup>192</sup>	Fanshawe is a comprehensive college serving the greater London region by providing flexible learning arrangements and experiential education opportunities developed in response to labour market needs. As one of Ontario's largest colleges - with campuses in London, Simcoe, St. Thomas, and Woodstock - Fanshawe serves close to half a million people with a promise to educate, engage, empower, and excite <sup>193</sup> .
Western University	14,503 <sup>194</sup> (both full-time and part-time employees of which 4,221 is full-time)	Founded in 1878, Western University in London, Ontario is one of Canada's leading research-intensive universities, combining academic excellence with life-long opportunities for intellectual, social, and cultural growth in the arts, humanities, engineering, sciences, health sciences, social sciences, business, and law. With research collaborations on every continent and students and faculty trained far and wide, Western is actively engaged internationally. Western is proud to provide Canada's best student experience <sup>195</sup> .
Ivey Business School	301 (271 full-time and 30 part-time employees) <sup>196</sup>	Ivey Business School is located on Western University's campus in London, Ontario, Canada midway between Toronto and Detroit, Michigan. Ivey Business School has earned an international reputation for its teaching and research excellence and the high calibre of its students and faculty. For nine years, Bloomberg Businessweek has ranked Ivey the No. 1 MBA program in Canada (2014-2019, 2022-2024). Renowned for its Case-Method of Learning, Ivey Business School is one of the two most important producers of business cases in the world, alongside Harvard <sup>197</sup> .
King's University College	413 (282 full time employees and 131 part time employees) <sup>198</sup>	King's University College at Western University is a liberal arts university college with its roots in the Catholic intellectual tradition. King's is recognized, both nationally and internationally. Offering degree programs in the arts, social sciences, management and social work, King's is home to approximately 3500 full- and part-time students from across Canada as well as 23 other countries <sup>199</sup> .

<sup>192</sup> Data collected via email with Fanshawe on May 2, 2024.<sup>193</sup> [About Fanshawe | Fanshawe College](#)<sup>194</sup> Western Main Campus Employment on May 1, 2024. Data collected via email with Western University on May 23, 2024.<sup>195</sup> [Western University on The Conversation](#)<sup>196</sup> Data collected via email with Ivey HR on May 8, 2024.<sup>197</sup> [Quick Facts | Ivey Business School \(uwo.ca\)](#)<sup>198</sup> King's University College's employees as of April 2024. Data collected via email with King's University College on April 22, 2024.<sup>199</sup> [About King's - King's University College \(uwo.ca\)](#)

Employers	Employees	Brief Summary
Huron University College	255 (200 full time employees and 55 part time employees) <sup>200</sup>	Established in 1863, Huron is the founding institution of Western University and one of Canada's oldest universities. Huron has a diverse community drawing outstanding students from across Canada and over 55 countries around the globe <sup>201</sup> .

## Elementary and Secondary Catholic School Boards and Schools

Employers	Employees	Brief Summary
London District Catholic School Board <sup>202</sup>	4,437 <sup>203</sup> (Middlesex, Oxford, and Elgin counties, including the cities of London, St. Thomas, Strathroy, and Woodstock)	The London District Catholic School Board, also known as the LDCSB, has a reputation for excellence in Catholic Education, academics, sports and recreation, and extra curriculars. LDCSB has more than 4,500 employees working together to educate approximately 27,500 students at 44 elementary schools, 9 secondary schools, and St. Patrick Adult & Continuing Education within Middlesex, Oxford, and Elgin counties, including the cities of London, St. Thomas, Strathroy, and Woodstock <sup>204</sup> .
1. Catholic Education Centre <sup>205</sup>	157 <sup>206</sup>	<i>Catholic Education Centre is the Board Office at the London District Catholic School Board.</i>
2. Saint Andre Bessette Secondary School	107 <sup>207</sup>	<i>Saint Andre Bessette Secondary School is a <a href="#">Catholic</a> secondary school in <a href="#">London, Ontario</a>, Canada administered by the <a href="#">London District Catholic School Board</a> (LDCSB). It is the most recent high school to be built in the LDCSB<sup>208</sup>.</i>

<sup>200</sup> Data collected via email with Huron University College on May 6, 2024.

<sup>201</sup> [Home - Huron University \(huronatwestern.ca\)](https://www.huronatwestern.ca)

<sup>202</sup> LDCSB has two schools with 100 or more employees: Saint Andre Bessette Secondary School and Catholic Education Centre (Board Office). Data collected via email with London District Catholic School Board on April 18, 2024.

<sup>203</sup> London District Catholic School Board's employees as of April 2024. Data collected via email with London District Catholic School Board on April 18, 2024.

<sup>204</sup> [Join us! - Careers - London District Catholic School Board \(ldcsb.ca\)](#)

<sup>205</sup> [London District Catholic School Board - informationlondon.ca](#)

<sup>206</sup> Catholic Education Centre's employees as of April 2024. Data collected via email with London District Catholic School Board on April 18, 2024.

<sup>207</sup> Saint Andre Bessette Secondary School's employees as of April 2024. Data collected via email with London District Catholic School Board on April 18, 2024. [Staff & Teachers – About Us – Saint André Bessette Catholic Secondary School \(ldcsb.ca\)](#)

<sup>208</sup> [St. Andre Bessette Catholic Secondary School - Wikipedia](#)

Employers	Employees	Brief Summary
Conseil scolaire catholique Providence <sup>209</sup>	2,275 <sup>210</sup> (Southwestern Ontario)	The Providence Catholic School Board provides education to nearly 9,500 students, spread across 23 elementary schools and 8 secondary schools. In addition to having the highest graduation rate in Southwestern Ontario (97%) among all French and English school boards, the Providence Catholic School Board offers programs aimed at the success of all students, teaching based on values Catholics, high-quality French, and a certificate of bilingualism <sup>211</sup> .

### Elementary and Secondary Public-School Board and Schools

Employers	Employees	Brief Summary
Thames Valley District School Board <sup>212</sup>	6,692 (4,507 full-time employees and 2,185 part-time employees) <sup>213</sup>	Thames Valley is the fourth largest public-school board in Ontario <sup>214</sup> , serving an area that stretches more than 200 kilometers and across more than 7,000 square kilometers <sup>215</sup> . TVDSB administers 131 elementary and 27 secondary schools, with the enrolment of 84,400 elementary students and secondary students. Total employed by the TVDSB <sup>216</sup> was 14,000 as of September 12, 2024 <sup>217</sup> . <i>TVDSB has 15 schools with over 100 employees in London.</i>
1. Saunders Secondary School	188 <sup>218</sup>	<i>Saunders Secondary School is the largest secondary school in TVDSB. It is a senior composite school offering many unique opportunities for students and has always had a highly respected academic core<sup>219</sup>.</i>
2. Clarke Road Secondary School <sup>220</sup>	147 <sup>221</sup>	<i>Clarke Road Secondary School is located at 300 Clarke Road in London, Ontario. It is a part of the Thames Valley District School Board. The school was founded in 1956, and a major 14-million-dollar renovation was completed in 1997<sup>222</sup>.</i>

<sup>209</sup> This school board does not have any school with more than 100 employees. Data collected via email with Conseil scolaire catholique Providence on April 29, 2024. The Board is based out of Windsor and has schools spanning most of Southwestern Ontario.

<sup>210</sup> Published on the school board's website as of April 28, 2024: [Jobs – Jobs – Providence Catholic School Board \(cscprovidence.ca\)](https://www.cscprovidence.ca/jobs)

<sup>211</sup> [Csc Providence announces the appointment of Nicole Larocque as superintendent of education - News - Providence Catholic School Board \(www.cscprovidence-ca.translate.goog\)](https://www.cscprovidence-ca.translate.goog)

<sup>212</sup> [Facts about Thames Valley - TVDSB](#)

<sup>213</sup> Data collected via email with TVDSB on May 17, 2024.

<sup>214</sup> [About Us - TVDSB](#)

<sup>215</sup> [Facts about Thames Valley - TVDSB](#)

<sup>216</sup> London and the surrounding areas

<sup>217</sup> Data retrieved from TVDSB on September 12, 2024.

<sup>218</sup> Data collected via email with TVDSB on May 17, 2024.

<sup>219</sup> [About Saunders - Saunders Secondary School \(tvdsb.ca\)](#)

<sup>220</sup> [Clarke Road Secondary School \(tvdsb.ca\)](#)

<sup>221</sup> Data collected via email with TVDSB on May 17, 2024.

<sup>222</sup> [Clarke Road Secondary School - Wikipedia](#)

Employers	Employees	Brief Summary
3. Sir Frederick Banting Secondary School	146 <sup>223</sup>	<i>Banting Secondary School is a grade 9-12 comprehensive secondary school with a very strong tradition of excellence in academics, arts, scholarship, sports, and community service. The school is named after Sir Frederick Banting who served with distinction as a medical officer in the Royal Army Medical Corps during the First World War.</i>
4. Beal Secondary School	146 <sup>224</sup>	<i>H. B. Beal Secondary School is a very large composite school in the downtown London area. It is home to almost 2000 students who come from all over the Thames Valley District<sup>225</sup>.</i>
5. White Oaks Public School	136 <sup>226</sup>	<i>White Oaks Public School was opened in 1978 to serve 565 students from kindergarten to grade eight. Special and unique features of White Oaks Public School include: a triple size gymnasium, state of the art library, and an outstanding lunchroom and server<sup>227</sup>.</i>
6. Sir Wilfrid Laurier Secondary School	125 <sup>228</sup>	<i>Sir Wilfrid Laurier Secondary School is a dynamic and progressive school located in the Pond Mills neighborhood of Southeast London. It is one of two public French Immersion secondary schools in the City of London and offers a wide range of programming in all academic areas, along with extensive offerings in Technology and The Arts. Laurier's student population is approximately 1200<sup>229</sup>.</i>
7. Medway High School	125 <sup>230</sup>	<i>Medway High School is a medium sized composite school of approximately 1500 + students, located approximately five minutes north of London, Ontario, Canada. Medway is part of the Thames Valley District School Board<sup>231</sup>.</i>
8. Wilfrid Jury Public School	123 <sup>232</sup>	<i>Wilfrid Jury first opened its doors in September 1990. The school is named after the late Dr. Wilfrid Jury, a well-known London archaeologist<sup>233</sup>.</i>
9. Eagle Heights Public School	116 <sup>234</sup>	<i>Eagle Heights Public School is located at 284 Oxford Street West in London. The school is a Junior Kindergarten to Grade Eight facility that accommodates approximately 1050 students<sup>235</sup>.</i>

<sup>223</sup> Data collected via email with TVDSB on May 17, 2024.

<sup>224</sup> Data collected via email with TVDSB on May 17, 2024.

<sup>225</sup> [About Us - H.B. Beal Secondary School \(tvdsb.ca\)](#)

<sup>226</sup> Data collected via email with TVDSB on May 17, 2024.

<sup>227</sup> [About Us - White Oaks Public School \(tvdsb.ca\)](#)

<sup>228</sup> Data collected via email with TVDSB on May 17, 2024.

<sup>229</sup> [About Us - Sir Wilfrid Laurier Secondary School \(tvdsb.ca\)](#)

<sup>230</sup> Data collected via email with TVDSB on May 17, 2024.

<sup>231</sup> [About Us - Medway High School \(tvdsb.ca\)](#)

<sup>232</sup> Data collected via email with TVDSB on May 17, 2024.

<sup>233</sup> [About Us - Wilfrid Jury Public School \(tvdsb.ca\)](#)

<sup>234</sup> Data collected via email with TVDSB on May 17, 2024.

<sup>235</sup> [About Us - Eagle Heights Public School \(tvdsb.ca\)](#)

Employers	Employees	Brief Summary
10. Montcalm Secondary School	118 <sup>236</sup>	Montcalm Secondary School has a population of over 900 students as of September 2023. Montcalm hosts the only Aviation Program in the Thames Valley Board and is one of six schools to host the Technology Emphasis program <sup>237</sup> .
11. A. B. Lucas Secondary School	112 <sup>238</sup>	A.B. Lucas Secondary School opened its doors in September 1963 and was named after Dr. Alexander Burton Lucas, a Londoner who had a distinguished career in education, having served as a teacher, principal, inspector, Teacher's College master, superintendent, and director <sup>239</sup> .
12. Westminster Secondary School	109 <sup>240</sup>	Westminster Secondary School is a public high school located in south London, Ontario, with students from a variety of ethnic backgrounds from across the world. Westminster is administered by the Thames Valley District School Board. Approximately 975 students attend the school, in grades nine to 12 <sup>241</sup> .
13. Oakridge Secondary School	103 <sup>242</sup>	Oakridge S.S. has a strong tradition of academic excellence complemented by an outstanding commitment to the arts, athletics, and community involvements. Oakridge boasts a wide range of clubs, teams, music ensembles, groups, and activities that are tailored to meet students' interests <sup>243</sup> .
14. Wheable Adult	130 <sup>244</sup>	Wheable Adult provides Adult and Continuing Education programs. It has approximately 18,000 students at five main sites in London, St. Thomas, Strathroy, Tillsonburg and Woodstock.
15. Stoney Creek Public School	102 <sup>245</sup>	Stoney Creek Public School is located at 1335 Nicole Avenue in London. The school has approximately 950 students in kindergarten through to grade 8 <sup>246</sup> .

Source: Direct contact with employers, LEDC, Mergent Intellect by FTSE Russell, and reputable websites

#### 4.1.5. Public Funding Support

Education in Canada is for the most part provided publicly, funded, and overseen by federal, provincial, and local governments<sup>247</sup>. The education system's public funding model provides stability to the sector.

<sup>236</sup> Data collected via email with TVDSB on May 17, 2024.

<sup>237</sup> <https://montcalm.tvdsb.ca/en/our-school/about-us.aspx>

<sup>238</sup> Data collected via email with TVDSB on May 17, 2024.

<sup>239</sup> <https://lucas.tvdsb.ca/en/our-school/about-us.aspx>

<sup>240</sup> Data collected via email with TVDSB on May 17, 2024.

<sup>241</sup> [About Us - Westminster Secondary School \(tvdsb.ca\)](#)

<sup>242</sup> Data collected via email with TVDSB on May 17, 2024.

<sup>243</sup> [About Us - Oakridge Secondary School \(tvdsb.ca\)](#)

<sup>244</sup> Data collected via email with TVDSB on May 17, 2024.

<sup>245</sup> Data collected via email with TVDSB on May 17, 2024.

<sup>246</sup> <https://stoneycreek.tvdsb.ca/en/our-school/our-school.aspx>

<sup>247</sup> [Education in Canada - Wikipedia](#)

- In 2022, Ontario announced \$20.7 million in funding to build a new elementary school for the Thames Valley District School Board. The new TVDSB school was projected to accommodate 804 students and have 88 new licensed child-care spaces and 5 child-care rooms. The Ministry of Education also announced \$18.9 million would go towards a new Catholic French-language secondary school in London with 587 student spaces in 2022. Other local projects included \$7.2 million for improvements to Eagle Heights PS in London, creating 300 new elementary student spaces and \$2.7 million for the addition of 88 child-care spaces for the Northeast London Elementary School.
- The Ministry of Education approved \$55.3 million in funding for the Thames Valley District School Board to build two new elementary schools in west and southeast London (Global News, April 30, 2024). The schools are scheduled to be built by the 2026/2027 school year. The west London elementary school will cost \$27.1 million and accommodate 525 students, and the southeast London location will cost \$28.2 million and accommodate 655<sup>248</sup>.
- The Ministry of Education has approved three new elementary schools for the London District Catholic School Board: a new northwest London elementary school (St. Gabriel, opening early 2025), a new northeast London elementary school, and a \$20.6 million elementary school in the Kilworth-Komoka area west of London with space for 424 pupils and a five-room child-care centre. In addition, construction is underway for the \$51 million replacement building for Regina Mundi College, scheduled to be completed for Fall 2026.
- On February 26, 2024, the provincial government announced an investment of \$1.3 billion (one-time, over three years) to stabilize Ontario's colleges and universities and legislation to increase institutional accountability on student mental health, anti-hate/racism, and fee transparency<sup>249</sup>. Western's share of funding is \$45.6 million one-time, over three years (from the \$903 million sustainability fund) and \$9.9 million one-time, retroactive payment for previously unfunded STEM enrolment (from the \$100 million fund for STEM program costs)<sup>250</sup>.

## 4.2. Weaknesses

### 4.2.1. Dependence on Government Funding

One of the weaknesses of the educational services sector is the dependence on the government funding which can be vulnerable to budget constraints and changes in political priorities.

- Concerns have been raised about province's lack of funding for public school boards. While inflation has risen 17.3% since 2018, funding for schools only increased by 6.8%<sup>251</sup>.
  - The Thames Valley District School Board is wrestling with an \$18.5-million deficit, the largest in its history and almost three times bigger than forecast in spring 2023. The funding shortfall will mean serious challenges serving the needs of Thames Valley schools, staff, and communities. The deficit largely is the result of expenses related to increases in the number of sick days and in Canada Pension Plan and employment

<sup>248</sup> [Two new elementary schools to be built in London, Ont. \(msn.com\)](https://www.msn.com/en-ca/news/ontario/two-new-elementary-schools-to-be-built-in-london-ont/_ga=2.248111111.1644444444.1644444444.1644444444)

<sup>249</sup> <https://news.ontario.ca/en/release/1004227/ontario-investing-nearly-13-billion-to-stabilize-colleges-and-universities>

<sup>250</sup> As per email memo received from Alan Shepard – Western University's President & Vice-Chancellor

<sup>251</sup> [Educational Services: Ontario 2023-2025 - Job Bank](#)

insurance premiums, for which there has been no funding increases (London Free Press, February 28, 2024)<sup>252</sup>.

- Although institutional reliance on governments as a source of income is decreasing, grants from government, particularly operating grants from the provinces, remain the largest single source of funding in the postsecondary sector<sup>253</sup>.

#### 4.2.2. Labour Shortages

- Staffing issues have been an ongoing challenge faced by public school boards across the province, and even more so in Northern Ontario. According to the Ontario College of Teachers, the supply of teachers in the province has not kept pace with the demand for new teachers for several years. The current shortage was attributed to:
  - Fewer new teachers certified per year since 2015 in Ontario,
  - Increased annual retirements,
  - Pandemic disruptions which caused teachers to leave the profession on a temporary or permanent basis, and
  - Student enrolment growth outpacing teacher availability in certain regions<sup>254</sup>.
- To help remedy the shortage of teachers, the Ontario College of Teachers issued temporary certificates as an emergency measure for the school years between 2020-2021 and 2022-2023. These time-limited licenses enabled eligible teacher candidates in the province to be hired on daily occasional rosters and for short-term teaching contracts prior to graduating from their education programs. As of May 2022, more than 2,000 temporary certificates were issued<sup>255</sup>. The London-area Catholic school board also pushed for shorter teacher training in Ontario as it faces educator shortages in fall 2022<sup>256</sup>.
- Other educational support roles in Ontario have also faced persistent labour shortages. School boards across the province have struggled to fill job vacancies for educational assistants, who primarily work with students with special needs. Common reasons for this include the increasingly complex and changing scope of its job requirements, poor compensation, and a lack of resources to support their roles<sup>257</sup>. As of November 30, 2023, Thames Valley District school board ran an educational assistant vacancy rate of 30%<sup>258</sup>.

### 4.3. Opportunities

Population growth, demand for postsecondary education and training, and investment and research collaborations will continue to drive growth in the industry<sup>259</sup>.

<sup>252</sup> [\\$18.5M deficit poses 'serious challenges' for Thames board: Chair | London Free Press \(lfpress.com\)](#)

<sup>253</sup> [The State of Postsecondary Education in Canada 2023 \(higheredstrategy.com\)](#)

<sup>254</sup> [Educational Services: Ontario 2023-2025 - Job Bank](#)

<sup>255</sup> [Educational Services: Ontario 2023-2025 - Job Bank](#)

<sup>256</sup> [Train teachers faster, London-area Catholic school board urges as shortage looms | London Free Press \(lfpress.com\)](#)

<sup>257</sup> [Educational Services: Ontario 2023-2025 - Job Bank](#)

<sup>258</sup> [Special needs shortage: EA vacancy rates rises to 30 per cent | London Free Press \(lfpress.com\)](#)

<sup>259</sup> [Educational Services: Ontario 2023-2025 - Job Bank](#)

### 4.3.1. Population Growth

- London's population is expected to grow by 2.1% in 2024 (Conference Board of Canada, Major City Insights London, August 10, 2023). The population growth suggests that there is an increasing demand for education services, with a need for more schools, teachers, and support staff, therefore, will support the demand for employment in this sector.
  - The London District Catholic School Board (LDCSB) hired nearly 100 permanent teachers for Fall 2023. LDCSB's student population increased approximately 30% over the past five years and the London area is now one of the fastest growing regions in Canada. This rapid growth resulted in a need for qualified teachers at a pace not seen in decades<sup>260</sup>.
  - On March 27, 2024, Ontario Education Minister Stephen Lecce was in the London-area and announced badly needed new schools in growing areas with soaring enrolment<sup>261</sup>. Enrolment at the Thames Valley District School Board spiked by 6,000 students over the past four years to 85,000 (The Canadian Press, August 22, 2023)<sup>262</sup>.
  - Thames Valley District School Board - the region's largest school board made the case to build an unprecedented seven new schools and a school addition as the number of students continues to spike (The London Free Press, September 26, 2023)<sup>263</sup>.
  - Recent school announcements in London<sup>264</sup>:
    - October 2023: \$51 million for a replacement for Regina Mundi College<sup>265</sup>.
    - December 2023: \$28.7 million for an elementary school in northwest London and \$28.8 million for an elementary school in southwest London for the Thames Valley board<sup>266</sup>.
    - March 2024: \$20.6 million for London District Catholic board for an elementary school in the Kilworth-Komoka area west of London with space for 424 pupils and a five-room child-care centre<sup>267</sup>.
    - March 2024: \$25 million for the Thames Valley board for an elementary school in Lucan with room for 531 pupils and a child-care centre for 88 children<sup>268</sup>.

### 4.3.2. Demand for Postsecondary Education and Training<sup>269</sup>

- According to the Canadian Occupational Projection System, approximately 71% of the projected employment growth across the country between 2022 and 2031 is expected to be in occupations requiring postsecondary education or be in management. This indicates that even though university and college fees have been climbing, demand for enrolment will likely

<sup>260</sup> [News | London District Catholic School Board \(ldcsb.ca\)](https://news.london.ca/story/news/education/2023/09/26/london-district-catholic-school-board-hiring-100-teachers-fall-2023/)

<sup>261</sup> ['Good news' announcements expected Monday from Stephen Lecce in London | London Free Press \(lfpress.com\)](https://londonfreepress.com/news/education/good-news-announcements-expected-monday-from-stephen-lecce-in-london/)

<sup>262</sup> [Why this elementary school in London, Ont. is capping enrolment | CP24.com](https://cp24.com/story/news/education/2023/09/26/why-this-elementary-school-in-london-ont-is-capping-enrolment/)

<sup>263</sup> [Critical and urgent: Eight new public schools needed to counter enrolment pressures | London Free Press \(lfpress.com\)](https://londonfreepress.com/news/education/critical-and-urgent-eight-new-public-schools-needed-to-counter-enrolment-pressures/)

<sup>264</sup> ['Good news' announcements expected Monday from Stephen Lecce in London | London Free Press \(lfpress.com\)](https://londonfreepress.com/news/education/good-news-announcements-expected-monday-from-stephen-lecce-in-london/)

<sup>265</sup> ['Good news' announcements expected Monday from Stephen Lecce in London | London Free Press \(lfpress.com\)](https://londonfreepress.com/news/education/good-news-announcements-expected-monday-from-stephen-lecce-in-london/); [New Catholic high school to be built in London, replacing Regina Mundi | London Free Press \(lfpress.com\)](https://londonfreepress.com/news/education/new-catholic-high-school-to-be-built-in-london-replacing-regina-mundi/)

<sup>266</sup> ['Good news' announcements expected Monday from Stephen Lecce in London | London Free Press \(lfpress.com\)](https://londonfreepress.com/news/education/good-news-announcements-expected-monday-from-stephen-lecce-in-london/)

<sup>267</sup> ['Good news' announcements expected Monday from Stephen Lecce in London | London Free Press \(lfpress.com\)](https://londonfreepress.com/news/education/good-news-announcements-expected-monday-from-stephen-lecce-in-london/)

<sup>268</sup> ['Good news' announcements expected Monday from Stephen Lecce in London | London Free Press \(lfpress.com\)](https://londonfreepress.com/news/education/good-news-announcements-expected-monday-from-stephen-lecce-in-london/)

<sup>269</sup> [Educational Services: Ontario 2023-2025 - Job Bank](https://londonfreepress.com/news/education/educational-services-ontario-2023-2025-job-bank/)

still be high. Canadian postsecondary enrolment levels are projected to increase by 11.2% between 2022 and 2031<sup>270</sup>.

- For example, the transportation sector has long been a core piece of southwestern Ontario's economy, and that is expected to grow, and get greener, as Volkswagen's massive new electric vehicle battery plant is set to come to St. Thomas, bringing thousands of jobs to the region<sup>271</sup>. Volkswagen's new electric vehicle battery plant is expected to open in 2027 and employ about 3,000 people<sup>272</sup>. To meet the transportation industry's needs, Fanshawe will launch the new Green Vehicle Technology diploma program in January 2025 with the first cohort graduating in 2027<sup>273</sup>.

### 4.3.3. Investment and Research Collaborations

- Based on its research excellence and high-quality education, London has opportunities to attract more investment and research collaborations, both domestically and internationally, to expand the sector's reach and impact.
  - In 2022, Western University received \$10 million donation from Ron Schmeichel, a Canadian entrepreneur and financier, for a new entrepreneurship and innovation building. The 100,000 sq. ft. building is located in the heart of Western's campus and named the Ronald D. Schmeichel Building for Entrepreneurship and Innovation. The new facility opened on September 27, 2024, and is Western's first net-zero-energy building and a gathering place with state-of-the-art active learning classrooms, a space with 3D printers, metalworking, machinery and woodworking tools, and a digital lab<sup>274</sup>.
  - Western's Schulich School of Medicine & Dentistry has received \$16 million in 2022 as part of the new federal Biosciences Research Infrastructure Fund (BRIF) for the expansion of its state-of-the-art biocontainment level 3 (CL3) facility – Imaging Pathogens for Knowledge Translation (ImPaKT), located within the new Pathogen Research Centre (PRC)<sup>275</sup>. ImPaKT was among the first biocontainment facilities in Canada to respond to the COVID-19 pandemic by supporting research into virus spread, partnering with the industry to test vaccines, therapeutics, and antimicrobial materials. The grant supports the expansion of ImPaKT to include a facility to test new antimicrobial strategies to prevent the airborne spread of infectious diseases and a facility to produce antimicrobial therapies and vaccines for human use. The new expansion will also include a drug manufacturing facility, allowing both research and industry partners to produce pharmaceutical-grade drugs right here at Western. The upgrade of biocontainment facilities is an urgent need for post-secondary and research institutions to meet the immediate threat of human pathogens and to prepare for the possible pandemics of the future.

<sup>270</sup> [Educational Services: Ontario 2023-2025 - Job Bank](#)

<sup>271</sup> [Fanshawe College set to launch green vehicle tech program in 2024 | CBC News](#)

<sup>272</sup> [New power line planned to feed Volkswagen battery plant in St. Thomas | London Free Press \(lfpres.com\)](#)

<sup>273</sup> [Support the Green Vehicle Technology Program | Fanshawe College, data updated as per Fanshawe representative, retrieved on August 15, 2024.](#)

<sup>274</sup> [\\$10 million donation given to Western to fund new entrepreneurship and innovation building | CTV News](#)

<sup>275</sup> [Western's ImPaKT facility gets \\$16M from feds for pandemic research - Western News \(westernu.ca\)](#)

- In 2023, a team led by Western neuroscientist Jörn Diedrichsen received \$1 million in funding from the Once Upon a Time Foundation to develop a growth chart for the human cerebellum across an entire lifespan from birth to 80 years. The growth chart will allow clinicians for the first time to track neural development across a lifespan, providing a framework for diagnosis and prognosis<sup>276</sup>.
- As the devastating impacts of long COVID are becoming more evident and widespread, Western University, in 2023, has recruited a powerhouse talent to build and lead Canada's first-ever research program focused on understanding the impact of infectious diseases on cognition and the human brain. Renowned worldwide for her groundbreaking work on the effects of viral infections and neuroinflammation on memory, Dr. Robyn Klein joins Western as the new Canada Excellence Research Chair (CERC) in Neurovirology and Neuroimmunology. With \$8 million in federal funding, Klein – a scientist, prolific scholar and a medical doctor – brings her pioneering research program from Washington University in St. Louis, U.S., to the [Schulich School of Medicine & Dentistry](#) at Western<sup>277</sup>.
  - This infusion of resources could improve educational infrastructure and lab facilities at Western, creating more opportunities for students and young researchers. Dr. Klein's presence could foster cutting-edge studies that will not only raise the university's global research profile but also attract more top-tier researchers and graduate students to London.
- Western is positioned to lead the fight against neurodegenerative diseases with \$24 million in 2023 in support from the federal [New Frontiers in Research Fund \(NFRF\)](#). The new project is called TRanslational Initiative to DE-risk NeuroTherapeutics (TRIDENT). Led by Schulich School of Medicine & Dentistry professor [Ravi Menon](#), a team of researchers has developed a groundbreaking approach to identify promising therapies for diseases, such as Alzheimer's and Parkinson's and speed up their journey to market. This first-of-its-kind platform brings together a series of cutting-edge tests focused on evaluating how potential therapies impact cognition, such as memory, thinking skills and learning, from cell cultures to animal models. It will also study high-quality disease biomarkers and brain imaging, leveraging Western's innovative cognition testing platforms, advanced molecular and imaging techniques and existing industry and academic partnerships<sup>278</sup>.
- Fanshawe College received a ground-breaking donation of \$5 million from a Toronto-based philanthropist Diane Blake in August 2023 to establish a state-of-the-art Centre of Excellence for XR (Extended Reality) in Health Care. This generous contribution will revolutionize the field of health-care education by leveraging cutting-edge XR technology to enhance training and improve patient outcomes<sup>279</sup>.

<sup>276</sup> [Western-led human brain "growth chart" project receives \\$1M in funding \(westernu.ca\)](#)

<sup>277</sup> [Western recruits top neuroimmunologist as Canada Excellence Research Chair - Western News \(westernu.ca\)](#)

<sup>278</sup> [Western to revolutionize drug development for brain diseases with \\$24M federal funding boost - Western News \(westernu.ca\)](#)

<sup>279</sup> [Fanshawe announces \\$5 million donation to establish Centre of Excellence for XR in Health Care | Fanshawe College](#)

## 4.4. Threats

### 4.4.1. Economic Uncertainty

Economic downturns and changes in government funding have an impact on the financial stability and growth of the educational services sector.

- In February 2021, Laurentian University in Sudbury filed for creditor protection as part of its long-running financial issues<sup>280</sup>.
- Public funding, although still the major source of revenue in most provinces, has declined steadily since 2008/2009<sup>281 282</sup>. On February 26, 2024, Ontario government announced more than \$1.2 billion in new funding for post-secondary schools. This financial aid package was announced just months after a government-commissioned report found low provincial funding combined with a tuition cut and freeze implemented in 2019 pose a "significant threat" to the financial sustainability of the sector. Organizations that represent Ontario colleges and universities all said the new funding isn't enough to solve the sector's long-term funding problems. For example, the Council of Ontario Universities said while it provides "short-term relief," it falls short of the \$1.9 billion the governments blue-ribbon panel said universities needed in base funding over the next three years alone<sup>283</sup>.

### 4.4.2. Regulatory Changes

Policy changes may impact the financial stability of the educational services sector.

- Changes in the policy for international student permits can impact the universities' revenues because much of the revenue increase in Ontario colleges is attributable to the increased enrolment of international students over the last 10 years<sup>284</sup>.
  - The low levels of government funding have caused post-secondary institutions to increasingly turn to international student tuition fees, which are much higher than the rates for Canadian students. However, in January 2024<sup>285</sup>, the federal government announced that it would slash the number of international student permits, with Ontario seeing its allotment cut in half<sup>286</sup>. Post-secondary officials said the cut in international students' visas could wreak financial havoc on Ontario universities and colleges<sup>287</sup> because Ontario's post-secondary sector has become increasingly reliant on the high tuition fees paid by foreign students and has recruited them in staggering numbers<sup>288</sup>.
- The Ontario Teachers' Federation (OTF) has "reluctantly" agreed over the past three years to let retired teachers work for 95 days a year, instead of 50, to address lingering effects from

<sup>280</sup> [Legislation needed to spare others from Laurentian's fate: Canadian Association of University Teachers | CBC News](#)

<sup>281</sup> [The Daily — Trends in private and public funding in Canadian colleges, 2019/2020 \(statcan.gc.ca\)](#)

<sup>282</sup> [The Daily — The impact of the COVID-19 pandemic on university finances for the 2020/2021 fiscal year \(statcan.gc.ca\)](#)

<sup>283</sup> [Ontario boosts college and university funding by more than \\$1.2B, extends freeze on tuition fees | CBC News](#)

<sup>284</sup> [The Daily — Trends in private and public funding in Canadian colleges, 2019/2020 \(statcan.gc.ca\)](#)

<sup>285</sup> [Cap on student visas could wreak financial havoc on Ontario universities, colleges: officials | CBC News](#)

<sup>286</sup> [Majority of Ontario international student permits to go to public colleges, universities \(citynews.ca\)](#)

<sup>287</sup> [Cap on student visas could wreak financial havoc on Ontario universities, colleges: officials | CBC News](#)

<sup>288</sup> [What the cap on international students means for Doug Ford's government | CBC News](#)

the COVID-19 pandemic. But the organization declined to extending that plan because it was supposed to be a short-term measure. A nearly 50% reduction in the availability of retired educators to fill in when full-time teachers are absent will affect London-area school boards as they heavily rely on retired educators (London Free Press, April 8, 2024)<sup>289</sup>. At a time when schools are grappling with staffing challenges, extending the teaching capacity of retired educators could have provided crucial support to students and educators.

#### **4.4.3. Other Threats**

- Competition from other countries such as Australia, the United States, and the United Kingdom for the market of international students as these countries also seek to commercialize and internationalize their higher education systems.
- Competition from top-ranking universities in Canada such as University of Toronto and University of British Columbia.

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<sup>289</sup> [London area school boards brace for fallout as retired teachers' hours slashed | London Free Press \(lfpress.com\)](https://www.lfpress.com/news/local/london-area-school-boards-brace-for-fallout-as-retired-teachers-hours-slashed)

## Appendix A - London's Competitive Analysis Findings in Comparison with other Municipalities (2016 - 2021)

Detailed findings from London's competitive analysis completed for 2016 and 2021 are presented below. London was compared to other municipalities in Ontario including Toronto, Ottawa, Windsor, Kingston, Waterloo, Kitchener, Cambridge, and Hamilton.

### Location Quotient Findings

Table 8 presents location quotient results for the educational services industry in different municipalities in Ontario in 2021. Ontario was employed as the reference area.

**Table 8: Location Quotient and Shift-Share Findings of Municipalities in Ontario (2016 - 2021)**

Municipalities	2021 Location Quotient	Shift-Share (2016-2021) Industrial Mix Effect	Shift-Share (2016-2021) Differential Shift Effect	Position of Industry in Municipality
London	1.30	-258	483	Transitional
Toronto	0.99	-1,466	-3,290	Marginal
Ottawa	1.05	-545	1,396	Transitional
Windsor	0.99	-93	82	Moderate
Kingston	1.88	-113	468	Transitional
Waterloo	1.83	-111	378	Transitional
Kitchener	1.06	-136	579	Transitional
Cambridge	0.86	-50	819	Moderate
Hamilton	1.21	-329	554	Transitional

Source: Statistics Canada (Census Data), Custom Data Analysis – February 1, 2024

As presented in Table 8, London is one of six municipalities (together with Ottawa, Kingston, Waterloo, Kitchener, and Hamilton) that had a location quotient greater than one. A location quotient higher than one points to the concentration or specialization of the educational services industry in the municipality. London's location quotient of 1.30 suggests that the educational services industry's contribution to London's economy surpasses the same industry's contribution to the economy of Ontario.

Compared with other municipalities, following Kingston and Waterloo, London had the third highest location quotient result at 1.30 in 2021. According to the Ontario Ministry of Agriculture, Food and Rural Affairs (OMAFRA) interpretation, a location quotient higher than 1.25 is classified as "high". A high location quotient indicates that the educational services industry is serving needs that extend beyond London's boundaries. A high location quotient may also indicate that London has a competitive advantage in that industry, for example, its location, infrastructure, or attributes.

Other municipalities (Toronto, Windsor, and Cambridge) had a location quotient less than 1, which indicates that the educational services industry's share of these municipalities' employment falls short of the same industry's share of total employment in Ontario in 2021. This implies that the educational services industry's contribution to these municipalities' economy lags the same industry's contribution to the economy of Ontario.

## **Shift-Share Findings**

### **Industrial Mix Effect Findings**

Like other municipalities as presented in Table 8, London's educational services industry had a negative industrial mix effect relative to Ontario between 2016 and 2021. A negative industrial mix effect suggests that the educational services industry in London experienced a growth rate below Ontario's overall rate of growth.

### **Differential Shift Effect Findings**

As illustrated in Table 8, London is one of eight municipalities (together with Ottawa, Windsor, Kingston, Waterloo, Kitchener, Cambridge, and Hamilton) that had a positive differential shift effect relative to Ontario between 2016 and 2021. A positive differential shift effect indicates that the educational services industry in London experienced a higher rate of growth than Ontario's industry growth rate. Specifically, the positive differential shift effect indicates that local businesses in the industry performed better than businesses in the provincial industry, suggesting that London offers some sort of competitive advantage favoring businesses in the educational services industry.

Toronto's educational services industry had a negative differential shift effect relative to Ontario between 2016 and 2021. A negative differential shift effect suggests that the educational services industry in this municipality experienced a rate of growth below Ontario's industry growth rate.

### **Shift-Share and Location Quotient Findings Combined**

Based on the Carvalho Classification System of Economic Performance which uses a combination of shift-share and location quotient results, educational services (61) was positioned as a *transitional industry* in London between 2016 and 2021. This implies that London has an average specialization in educational services, with the local growth exceeding the provincial growth in this sector. Other municipalities that have educational services being positioned as a transitional industry like London are Ottawa, Kingston, Waterloo, Kitchener, and Hamilton.

Educational services (61) was positioned as a *moderate industry* in Windsor and Cambridge. This suggests that the educational services industry, which grew provincially at a slower rate than the overall growth, were relatively underrepresented in the community; the local growth exceeded the provincial growth in this industry.

Educational services (61) was positioned as a *marginal industry* in Toronto, suggesting that the educational services industry was under-represented in the community.

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