



# 2019 SECTOR SPOTLIGHT

## HEALTH CARE & SOCIAL ASSISTANCE



This program is funded in part by the Government of Canada and the Government of Ontario.



# Health care and social assistance

## Public administration

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### How does this sector stack up in Ottawa?

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

## What is this industry sector?

### STATISTICS CANADA DEFINITION



**This sector comprises establishments primarily engaged in providing health care by diagnosis and treatment, providing residential care for medical and social reasons, and providing social assistance**, such as counselling, welfare, child protection, community housing and food services, vocational rehabilitation and child care, to those requiring such assistance.

### SECTOR STRUCTURE

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

### SUBSECTORS

- 621 – Ambulatory health care services
- 622 – Hospitals
- 623 – Nursing and residential care facilities
- 624 – Social assistance

# How does this sector stack up in Ottawa?

## OTTAWA DASHBOARD

The graphic below ranks Ottawa's Top 13 sectors (based on # of jobs in 2018) and shows how *Health care and social assistance (NAICS 62)* stacks up against the other sectors on a dashboard highlighting key local labour market information (LMI).

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

Average annual salary in 2018\* not including self-employed

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

TOP 10 OCCUPATIONS (# of 2018 jobs)		TOP 10 EMPLOYERS (# of postings in 2018)		TOP 10 EMPLOYERS (number of employees)	
3012	Registered nurses and registered psychiatric nurses (9,220)	1.	CHEO / Children's Hospital of Eastern Ontario (372)	1.	Canadian Red Cross (6,640)
4214	Early childhood educators and assistants (6,867)	2.	Revera Inc (314)	2.	Victorian Order-Nurses For Cnd (5,000)
3413	Nurse aides, orderlies and patient service associates (5,861)	3.	Queensway Carleton Hospital (155)	3.	Ottawa Hospital-Civic Campus (5,000)
3112	General practitioners and family physicians (3,576)	4.	Bayshore Health Care (153)	4.	Ottawa Hospital-Riverside Cmps (3,000)
4212	Social and community service workers (2,443)	5.	Saint Elizabeth Health Care (123)	5.	Children's Hospital-Eastern On (2,000)
3111	Specialist physicians (2,174)	6.	Ottawa Health Research Institute / OHRI (99)	6.	University Ottawa Heart Inst (700)
1414	Receptionists (2,040)	7.	Pincrest-Queensway Community Health Centre / PQCHC (96)	7.	Perley-Rideau Veterans' Health (700)
3233	Licensed practical nurses (1,883)	8.	Extendicare (93)	8.	Carefor Health & Community Svc (500)
4152	Social workers (1,441)	9.	Health Canada / Santé Canada (62)	9.	Dyna Care (500)
1221	Administrative officers (1,311)	10.	Victorian Order of Nurses / VON (60)	10.	Ottawa Hospital (500)

## Sector Employment (Jobs)

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

	Region	2013 Jobs	2018 Jobs	Change	% Change
●	Ottawa	60,141	68,509	8,368	13.9%
●	Ontario	733,490	843,736	110,246	15.0%
●	Canada	2,006,365	2,287,472	281,107	14.0%

### 2018 EMPLOYMENT – A SUBSECTOR VIEW

# #2

**Ranked second out of 13 on # of jobs**

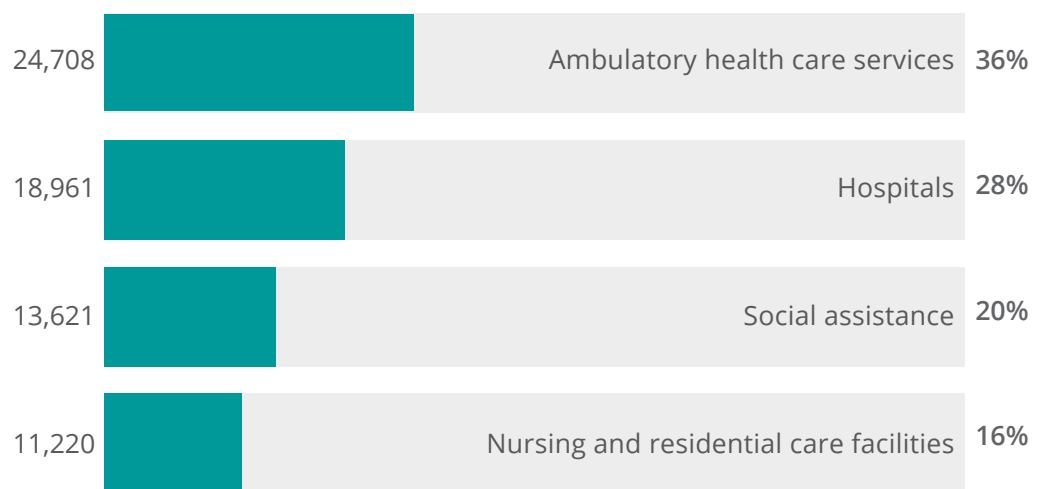
More than one-third (36%) of sector jobs are in Ambulatory health care services

One-quarter (28%) are in Hospitals

**68,509**  
11%

Job in other sectors  
566,636

### 68,509 Sector Jobs in 2018 (11% of all Ottawa Jobs)



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

NAICS	Description	2013	2014	2015	2016	2017	2018	% Change (2013-2018)	Forecast change (2018-2021)
621	Ambulatory health care services	21,192	21,630	21,641	22,684	24,100	24,708	20%	2,021
622	Hospitals	17,064	17,557	18,106	18,628	19,126	18,961	10%	1,408
624	Social assistance	11,809	12,944	12,302	12,097	12,823	13,621	10%	722
623	Nursing and residential care facilities	10,076	9,901	10,197	10,807	11,071	11,220	12%	1,138

Source: EMSI Analyst 2019

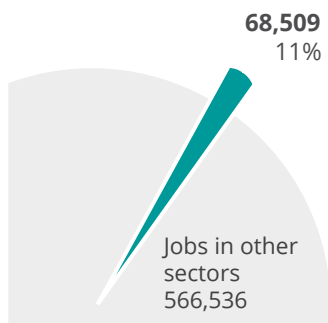
## 2018 EMPLOYMENT SNAPSHOT – INDUSTRY GROUPS

#6

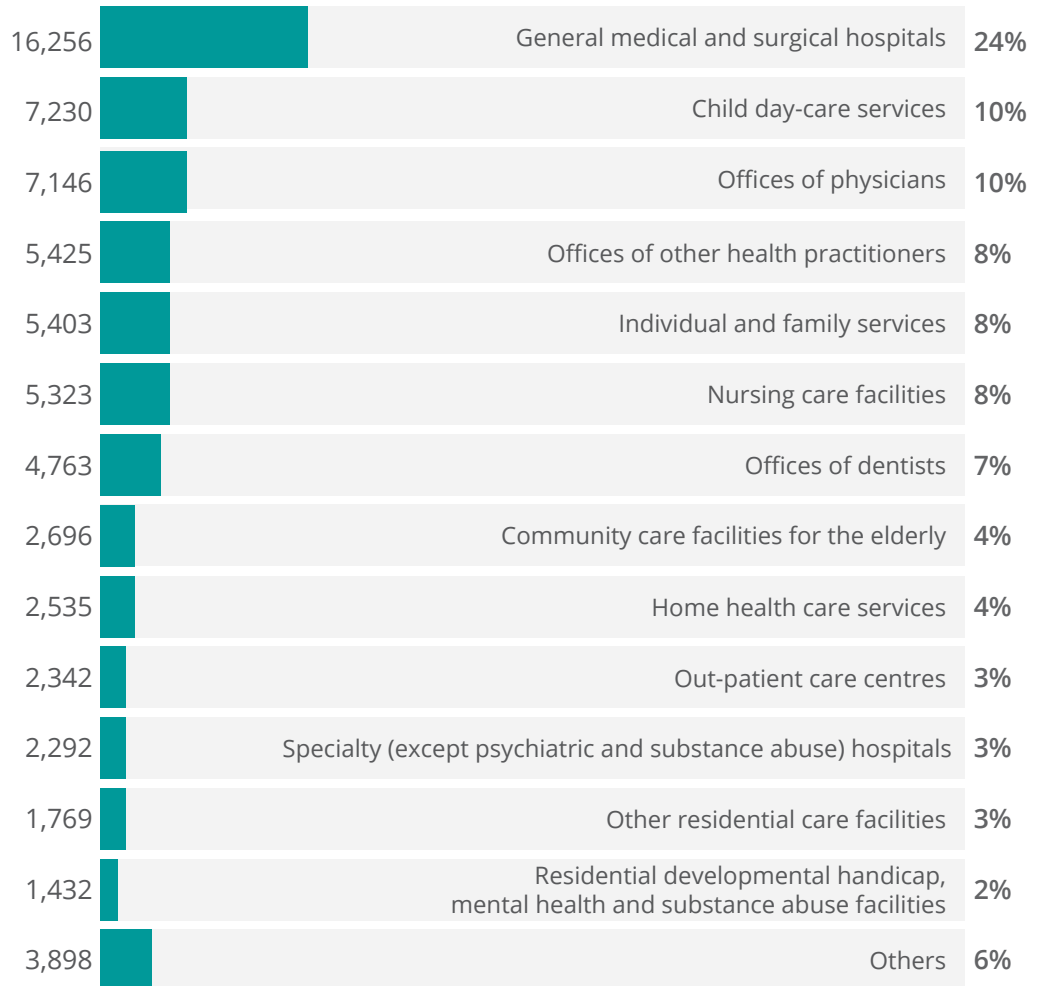
Ranked **sixth** out of **13** on specialization

**24%** of sector jobs in General medical and surgical hospitals

**7%** below the national average for **share of workers** in this industry



### 68,509 Sector Jobs in 2018 (11% of all Ottawa jobs)

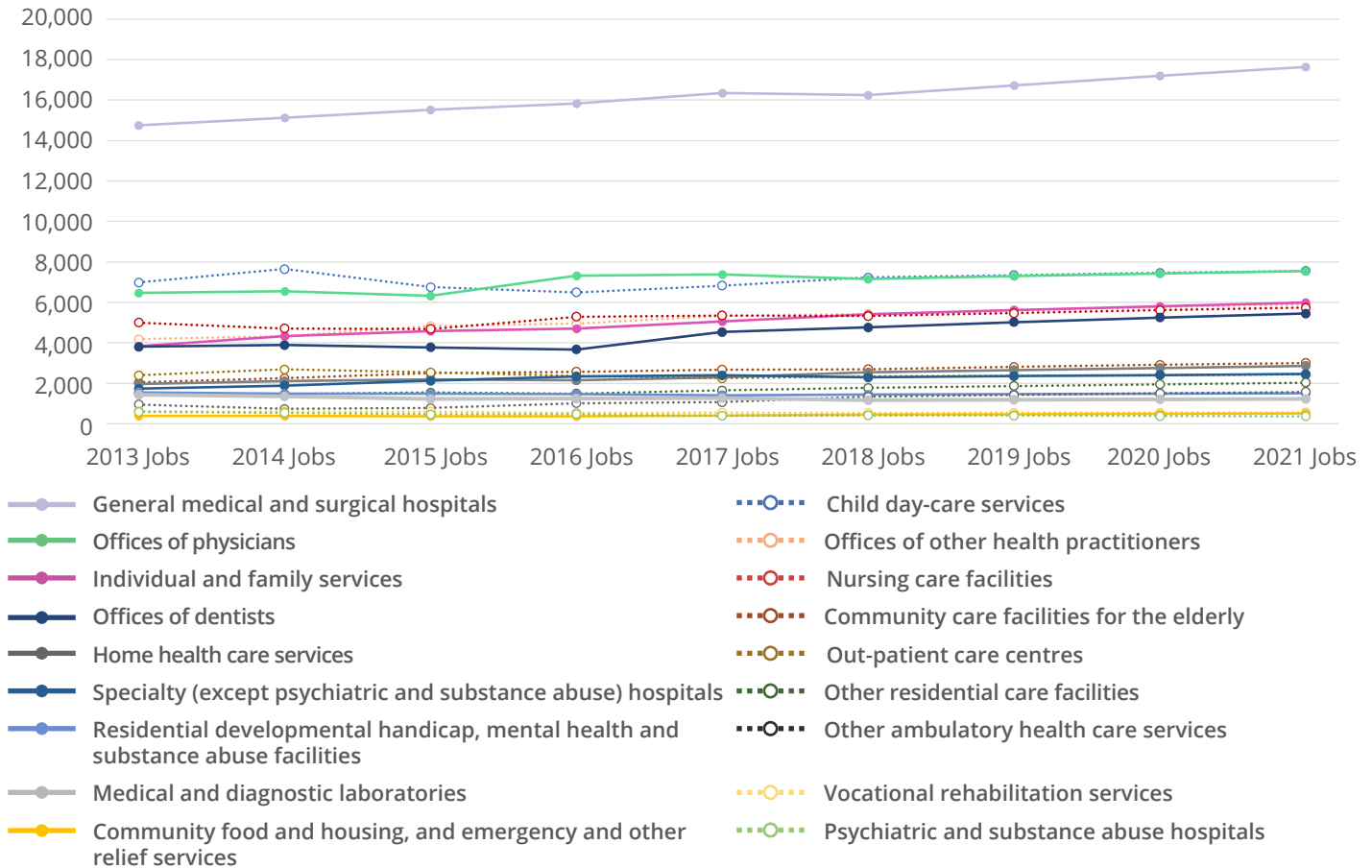


**A closer look at specialization:**

Ottawa’s share of workers in Specialty (except psychiatric and substance abuse) hospitals is over one and half times greater than the Canadian average, but its share of workers in Vocational rehabilitation services is less than half below the national average.

Source: EMSI Analyst 2019

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



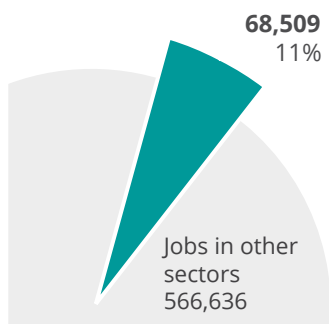
### Job numbers, growth rate and forecast number of new jobs\*

NAICS	Description	2013	2014	2015	2016	2017	2018	% Change (2013-2018)	Forecast change (2018-2021)
6221	General medical and surgical hospitals	14,750	15,132	15,524	15,829	16,341	16,256	10%	1,376
6244	Child day-care services	6,986	7,644	6,749	6,492	6,825	7,230	3%	326
6211	Offices of physicians	6,458	6,546	6,323	7,313	7,374	7,146	11%	396
6213	Offices of other health practitioners	4,183	4,333	4,817	4,943	5,334	5,425	30%	475
6241	Individual and family services	3,824	4,320	4,587	4,712	5,051	5,403	41%	580
6231	Nursing care facilities	5,001	4,703	4,689	5,291	5,348	5,323	6%	412
6212	Offices of dentists	3,806	3,884	3,773	3,666	4,529	4,763	25%	687
6233	Community care facilities for the elderly	2,043	2,250	2,496	2,572	2,674	2,696	32%	312
6216	Home health care services	1,969	2,105	2,195	2,146	2,295	2,535	29%	320
6214	Out-patient care centres	2,393	2,681	2,535	2,352	2,250	2,342	-2%	92
<b>SECTOR TOTAL</b>		<b>60,141</b>	<b>62,032</b>	<b>62,245</b>	<b>64,216</b>	<b>67,120</b>	<b>68,509</b>	<b>14%</b>	<b>5,808</b>

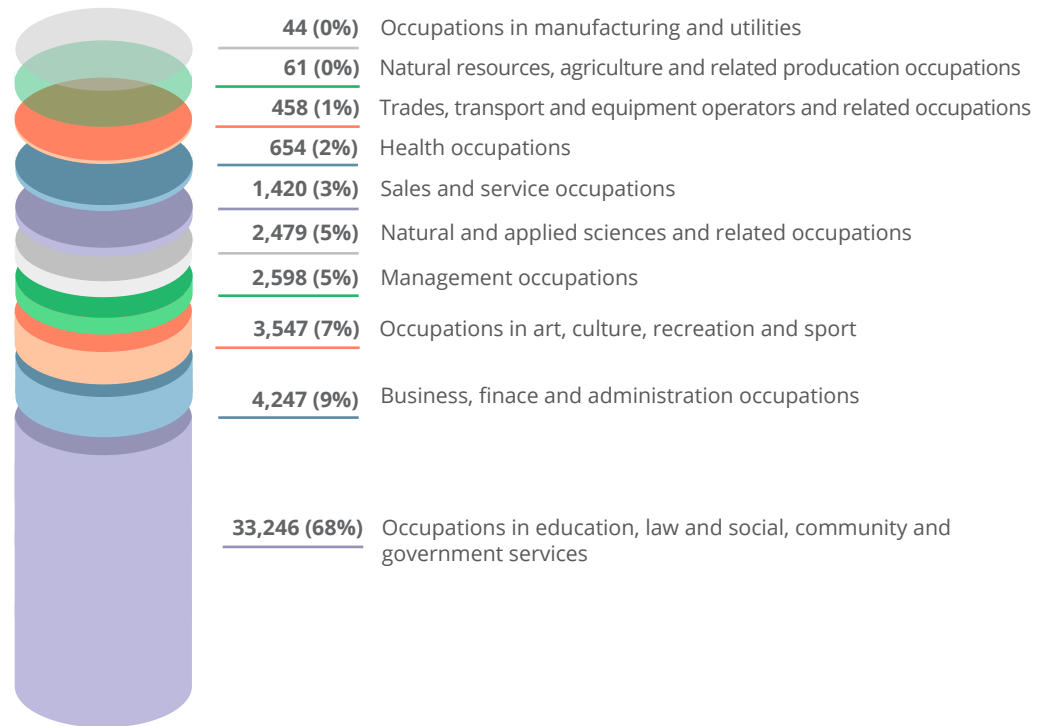
## KEY OCCUPATIONS IN THE SECTOR

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

The majority (68%) of sector jobs are Occupations in education, law and social, community and government services



### Sector Jobs in 2018 by Occupation Group



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

NAICS	Description	Employed in Industry (2013)	Employed in Industry (2018)	Change (2013- 2018)	% Change (2013 - 2018)	% of Total Industry Jobs (2018)
3012	Registered nurses and registered psychiatric nurses	7,977	9,220	1,243	16%	13.5%
4214	Early childhood educators and assistants	6,439	6,867	428	7%	10.0%
3413	Nurse aides, orderlies and patient service associates	5,293	5,861	568	11%	8.6%
3112	General practitioners and family physicians	1,857	3,576	1,719	93%	5.2%
4212	Social and community service workers	1,764	2,443	679	38%	3.6%
3111	Specialist physicians	1,312	2,174	862	66%	3.2%
1414	Receptionists	2,190	2,040	-150	-7%	3.0%
3233	Licensed practical nurses	1,609	1,883	274	17%	2.7%
4152	Social workers	1,295	1,441	146	11%	2.1%
1221	Administrative officers	1,437	1,311	-126	-9%	1.9%

Source: EMSI Analyst 2019



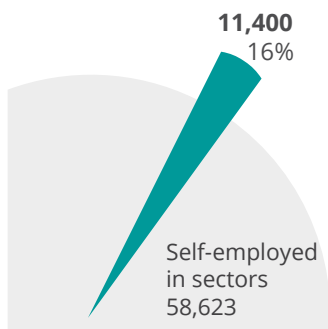
## Sector Self-Employment (2018)

### SECTOR AT A GLANCE

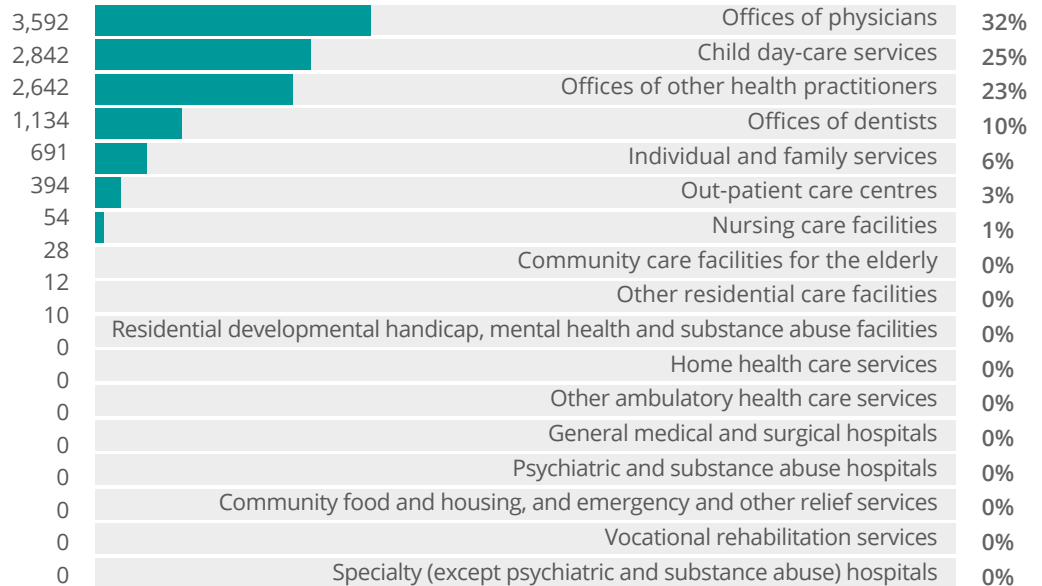
**#2**

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

32% of sector's self-employed workers are in Offices of physicians



#### 11,400 self-employed (16% of Ottawa's self-employed)



#### A closer look at share of self-employment:

While 16% of those working in this sector are self-employed, 50% of workers in Offices of physicians, and Offices of other health practitioner, two out of five workers in Child day-care services, are self-employed (see graph below).

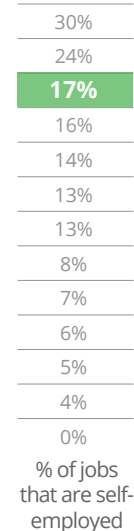
### A CLOSER LOOK AT SHARE OF SELF-EMPLOYMENT

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

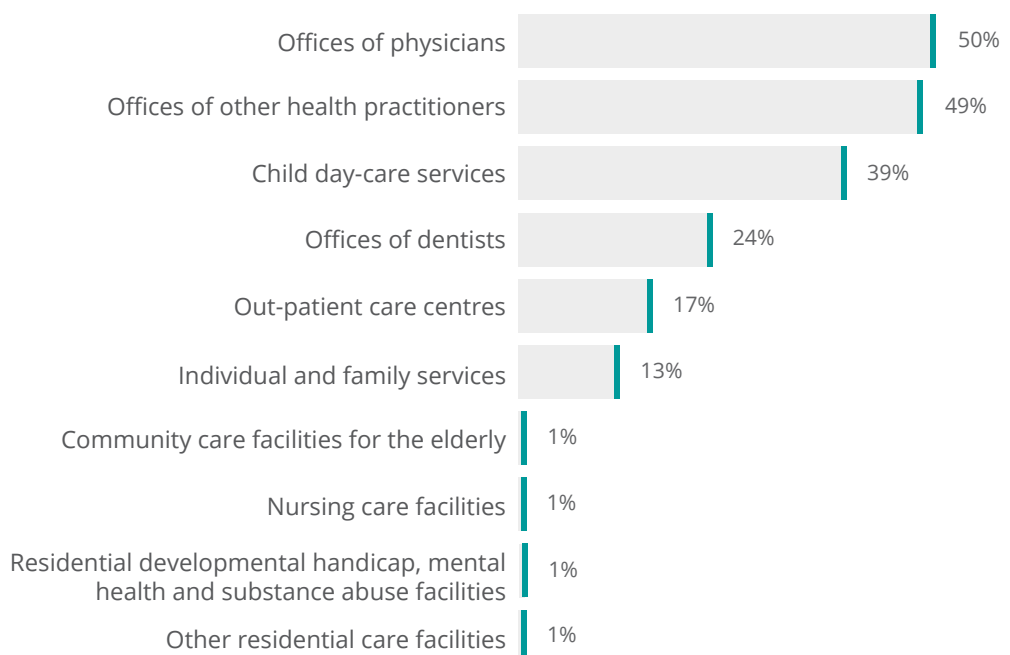
#### Sector Ranking

**#3**

Self-Employed



#### Share of workers self-employed in each industry group



Source: EMSI Analyst 2019

# Sector Business & Employer Counts (December 2018)

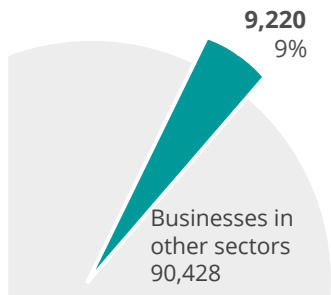
## SECTOR AT A GLANCE

#2

#3

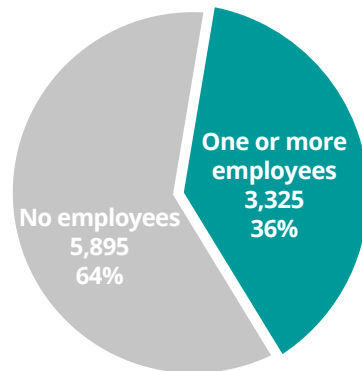
Ranked **second** out of 13 on number of business and **third** on number of employers

**36%** of sector businesses have employees currently on payroll

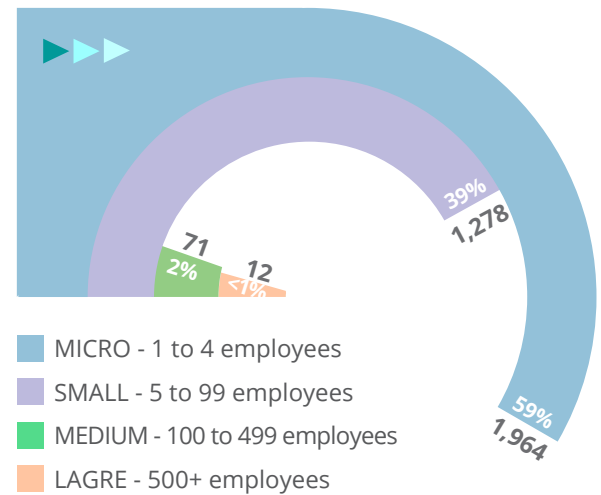


### 9,220 Ottawa Businesses (9% of all businesses)

#### SECTOR BUSINESSES



#### SECTOR EMPLOYERS



#### A closer look at employers:

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

## BUSINESS COUNTS AT INDUSTRY GROUP LEVEL

Code	Description	1-4	5-9	10-19	20-49	50-99	100-199	200-499	500+	None	Total
6211	Offices of physicians	1,272	131	50	21	2	2	0	0	1,831	3,309
6213	Offices of other health practitioners	347	121	57	17	2	1	0	0	1,817	2,362
6244	Child day-care services	23	40	48	56	7	2	3	0	1,187	1,366
6212	Offices of dentists	163	203	97	16	2	0	0	0	397	878
6241	Individual and family services	49	25	25	32	11	5	2	0	243	392
6214	Out-patient care centres	17	15	10	9	5	4	3	1	87	151
6216	Home health care services	16	3	0	7	4	8	2	1	94	135
6232	Residential developmental handicap, mental health and substance abuse facilities	10	24	42	22	1	0	0	0	2	101
6215	Medical and diagnostic laboratories	23	6	24	1	2	0	0	1	41	98
6233	Community care facilities for the elderly	3	5	6	11	19	10	2	0	23	79
N/A	ALL OTHER INDUSTRY GROUPS IN THIS SECTOR	41	25	26	38	10	16	11	9	173	349

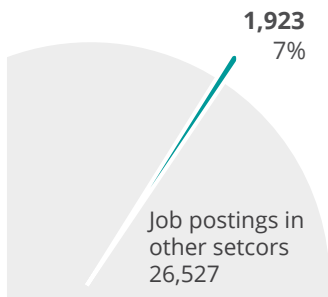
# Online Supply & Demand (2018)

## ONLINE JOB POSTINGS

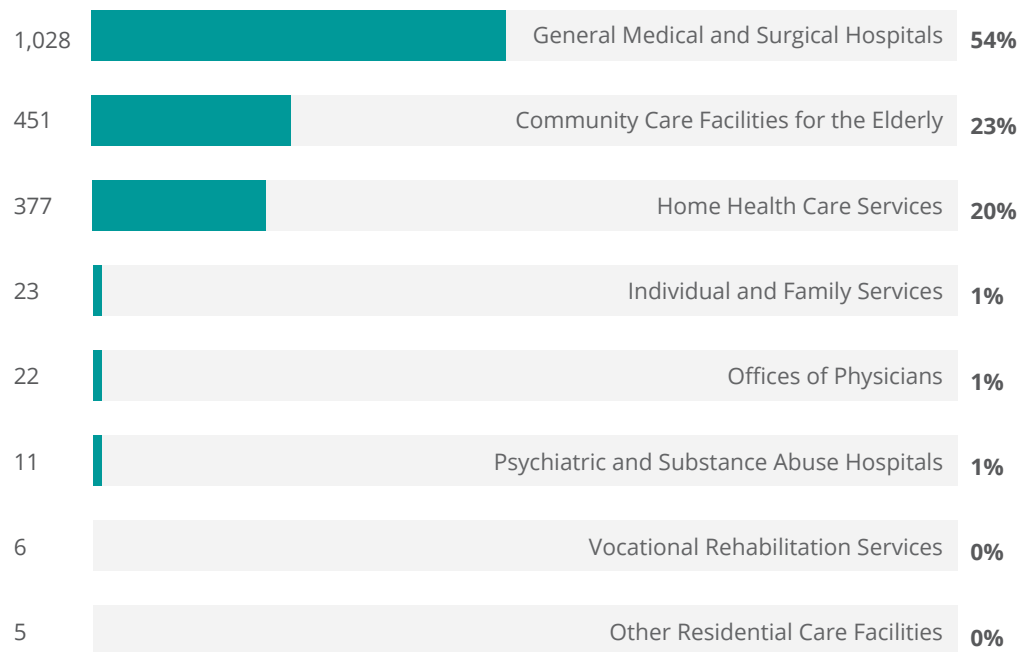
**#6**

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

Most ads of posted by companies in **General medical and surgical hospitals (54%)**, **Community care facilities for the elderly (23%)**, and **Home health care services (20%)**



### 1,923 Ottawa postings (7% of total postings)

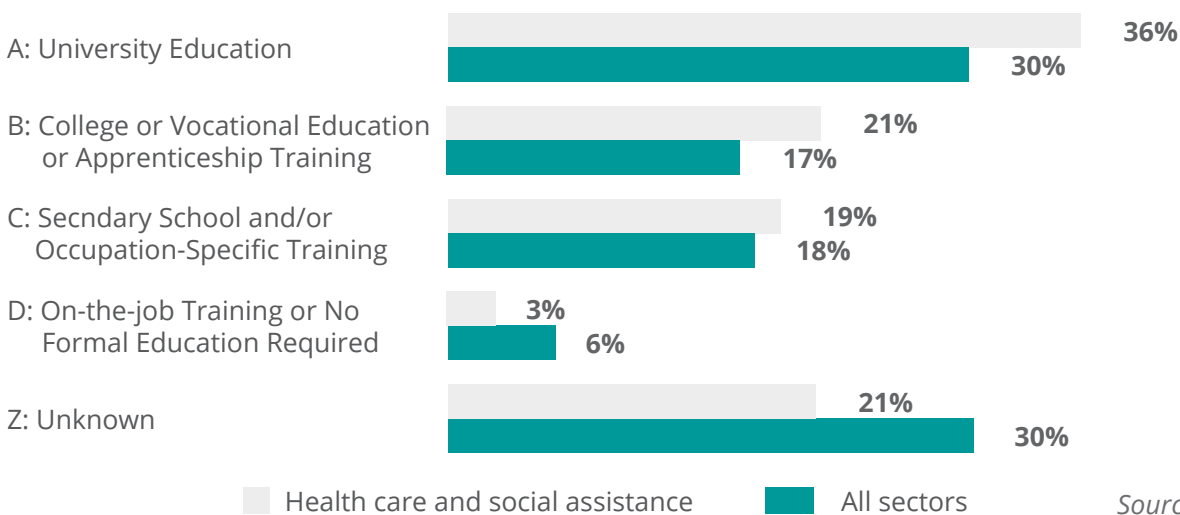


#### A closer look at skill level requirements:

Looking at the level of education required for jobs posted, we see a positive correlation between education level required and number of job postings (see graph below).

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

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



Source: Vicinity Jobs 2018

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

Employers	Postings	Percentage
CHEO / Children's Hospital of Eastern Ontario	372	19.30%
Revera Inc	314	16.30%
Queensway Carleton Hospital	155	8.10%
Bayshore Health Care	153	8.00%
Saint Elizabeth Health Care	123	6.40%
Ottawa Health Research Institute / OHRI	99	5.10%
Pinecrest-Queensway Community Health Centre / PQCHC	96	5.00%
Extencicare	93	4.80%
Health Canada / Santé Canada	62	3.20%
Victorian Order of Nurses / VON	60	3.10%
<i>Grand Total *</i>	<b>1,923</b>	<b>-</b>

Source: Vicinity Jobs 2018

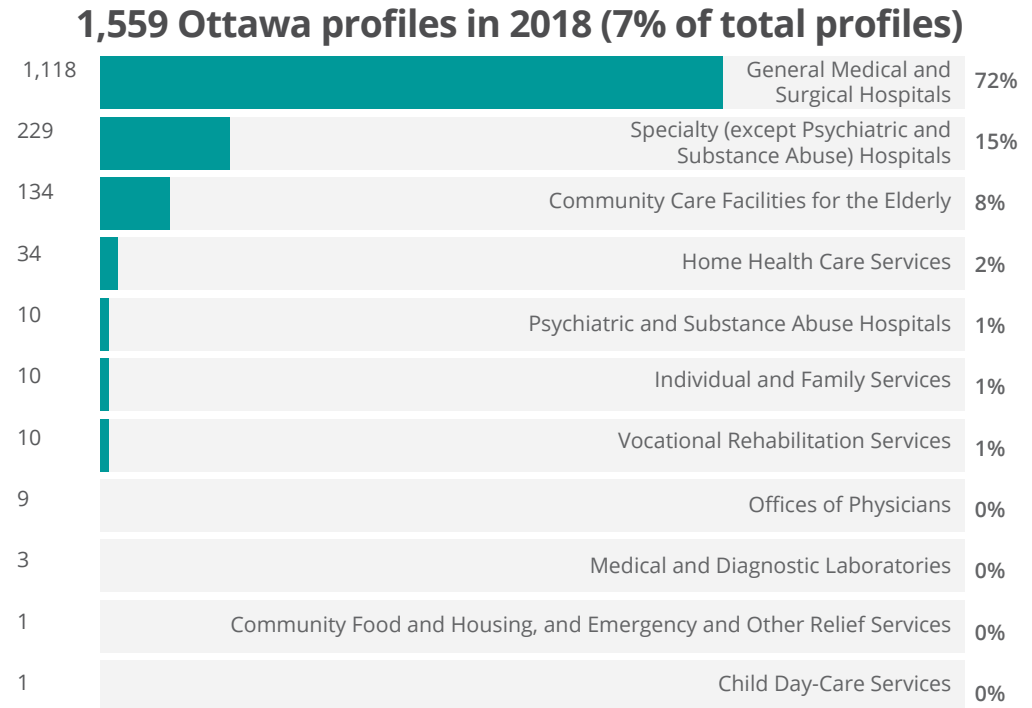
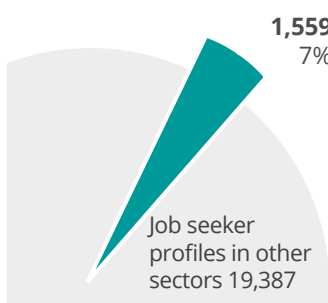
## ONLINE JOB SEEKER PROFILES

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

**#4**

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

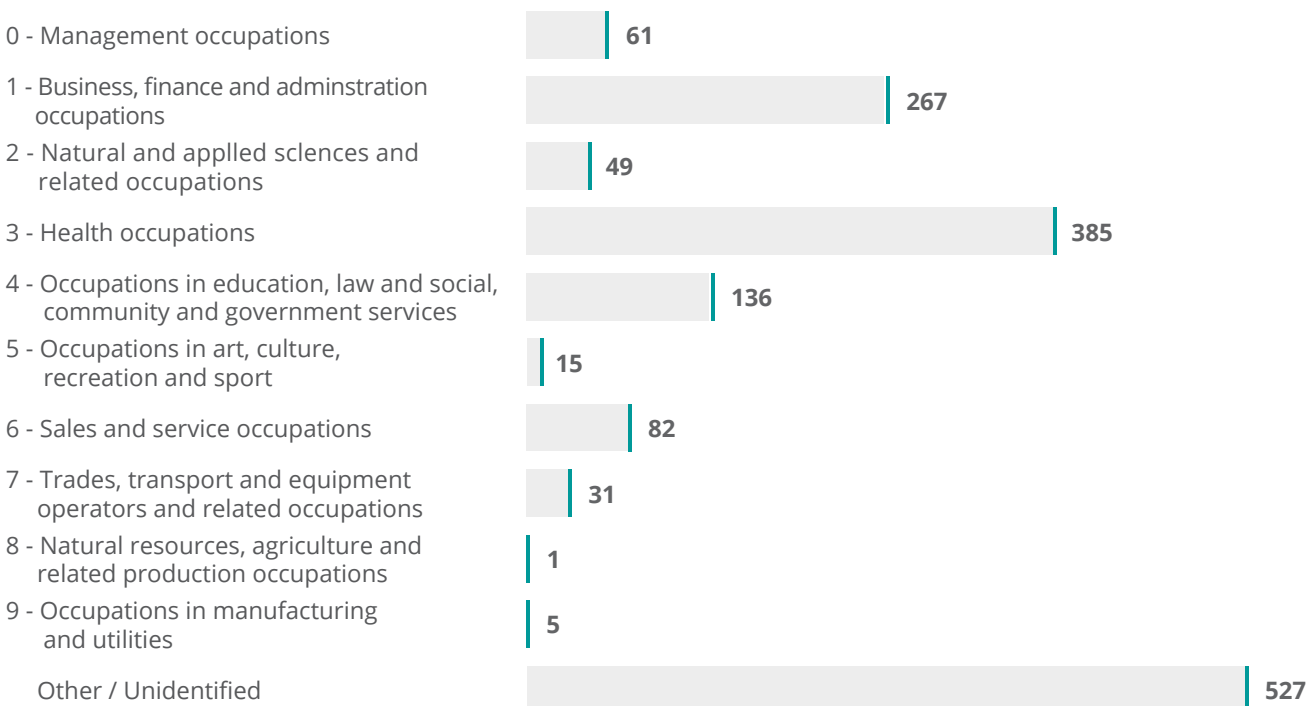
3 out of 4 profiles posted by job seekers with most recent experience in General medical and surgical hospitals



**A closer look at occupations for active job profiles:**  
Of those job profiles where occupation group could be identified, the most (385) were in Health occupations (see graph below).

### A Closer Look at Occupations of those with Active Job Profiles

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



Source: Vicinity Jobs 2018

## In the News Highlights

### GAINS

*June 12, 2019 CTV News*

#### [Feds pledge funding to keep Clarence St. supervised injection site running](#)

The federal government announced that it would pledge \$600,000 worth of funding to Ottawa Public Health in order to sustain Lower Town's supervised injection site on Clarence Street. The site was set to close in the wake of the provincial government's recent string of budget cuts, but federal government financing has protected the facility and the jobs of its employees.

### LOSSES

*June 19, 2019 CBC News*

#### [Champlain LHIN sheds 21 jobs under province-wide restructuring](#)

The Ontario government announced plans to cut 21 jobs at Eastern Ontario's Champlain LHIN (Local Health Integration Network), as it continues to amalgamate the province's health care agencies. Five workers with the LHIN will be laid off, while 16 job vacancies will be eliminated. Amalgamation efforts have cost more than 400 Ontarians their jobs thus far.

*June 7, 2019 Kingston Whig Standard*

#### [Popular smoking-cessation program cut by Ontario government](#)

With the Ontario government continuing its current trend of budget cuts, smoking-cessation program Leave the Pack Behind has been scrapped. 28 full and part-time staff have lost their jobs as a result of the decision.

## APPENDIX A - SECTOR STRUCTURE

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

### SUBSECTOR NAICS 621 – Ambulatory health care services

<u>Code</u>	<u>Industry group</u>
6211	Offices of physicians
6212	Offices of dentists
6213	Offices of other health practitioners
6214	Out-patient care centres
6215	Medical and diagnostic laboratories
6216	Home health care services
6219	Other ambulatory health care services

### SUBSECTOR NAICS 622 – Hospitals

<u>Code</u>	<u>Industry group</u>
6221	General medical and surgical hospitals
6222	Psychiatric and substance abuse hospitals
6223	Specialty (except psychiatric and substance abuse) hospitals

### SUBSECTOR NAICS 623 – Nursing and residential care facilities

<u>Code</u>	<u>Industry group</u>
6231	Nursing care facilities
6232	Residential developmental handicap, mental health and substance abuse facilities
6233	Community care facilities for the elderly
6239	Other residential care facilities

### SUBSECTOR NAICS 624 – Social assistance

<u>Code</u>	<u>Industry group</u>
6241	Individual and family services
6242	Community food and housing, and emergency and other relief services
6243	Vocational rehabilitation services
6244	Child day-care services

## Emsi Sample Report – Industry Summaries

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

### Industry Summary for General medical and surgical hospitals (NAICS6221)

**15,135**

Jobs (2018)

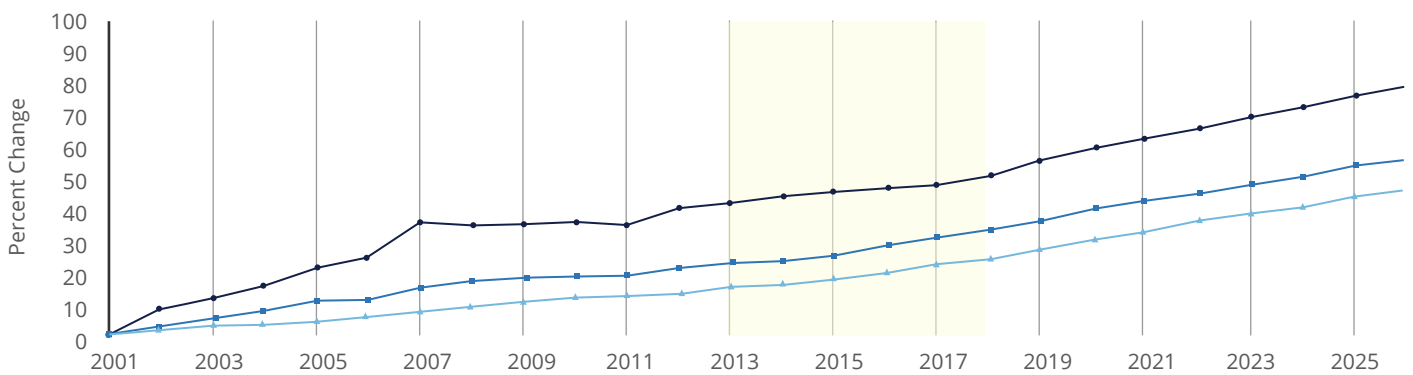
17% below National average

**7.2%**

% Change (2013-2018)

Nation: 9.0%

### Regional Trends



Region	2013 Jobs	2018 Jobs	Change	% Change
● Ottawa	14,113	15,135	1,022	7.2%
● Ontario	187,603	202,900	15,297	8.2%
● Canada	526,457	574,087	47,630	9.0%

### Top Occupations Employed by this Industry

Description	Employed in Industry (2018)	% of Total Jobs in Industry (2018)
Registered nurses and registered psychiatric nurses	4,850	32.0%
Nurse aides, orderlies and patient service associates	1,114	7.4%
General practitioners and family physicians	703	4.6%
Licensed practical nurses	512	3.4%
Medical radiation technologists	400	2.6%

Source: EMSI Analyst 2019





Local Employment Planning Council  
**2019 SECTOR SPOTLIGHT**  

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**HEALTH CARE & SOCIAL ASSISTANCE**