



2019 SECTOR SPOTLIGHT

PUBLIC ADMINISTRATION



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



Public administration

Public administration

What is this industry sector?

- STATISTICS CANADA DEFINITION

How does this sector stack up in Ottawa?

- OTTAWA DASHBOARD
- HIGHLIGHTS

Sector Employment (Jobs)

- REGIONAL TRENDS (5-year Job Growth - Ottawa vs. Ontario vs. Canada)
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- JOB NUMBERS BY INDUSTRY GROUP (Past 5 years and 3-year outlook)
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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 activities of a governmental nature, that is, the enactment and judicial interpretation of laws and their pursuant regulations, and the administration of programs based on them.

Legislative activities, taxation, national defence, public order and safety, immigration services, foreign affairs and international assistance, and the administration of government programs are activities that are purely governmental in nature.

Ownership is not a criterion for classification. Government owned establishments engaged in activities that are not governmental in nature are classified to the same industry as privately owned establishments engaged in similar activities.

Government establishments may engage in a combination of governmental and non-governmental activities. When separate records are not available to separate the activities that are not governmental in nature from those that are, the establishment is classified to this sector.

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

- 911 – Federal government public administration
- 912 – Provincial and territorial public administration
- 913 – Local, municipal and regional public administration
- 914 – Aboriginal public administration

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 **Public administration (NAICS 91)** stacks up against the other sectors on a dashboard highlighting key local labour market information (LMI).

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

Average annual salary in 2018* not including self-employed

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

TOP 10 OCCUPATIONS (# of 2018 jobs)	TOP 10 EMPLOYERS (# of postings in 2018)	TOP 10 EMPLOYERS (number of employees)
4164 Social policy researchers, consultants and program officers (7,884)	1. Ottawa, City of (607)	1. Royal Canadian Mounted Police (3,000)
2171 Information systems analysts and consultants (5,501)	2. Ontario Public Service / OPS (70)	2. International Photonics (2,500)
0414 Other managers in public administration (4,813)	3. Royal Canadian Mounted Police (59)	3. CMHC (1,500)
1411 General office support workers (4,055)	4. Food Research and Development Centre (FRDC), Agriculture and Agrifood Canada (57)	4. Ontario Court Of Justice (1,000)
4168 Program officers unique to government (4,032)	5. North Bay, Corporation of the City of (7)	5. National Archives Of Canada (700)
4161 Natural and applied science policy researchers, consultants and program officers (3,489)	6. Waterloo, Regional Municipality of (7)	6. Crsng Conseil De Recherche En (500)
2174 Computer programmers and interactive media developers (3,383)	7. Humane Wildlife Control Inc. (6)	7. National Capital Commission (400)
4311 Police officers (except commissioned) (3,214)	8. RCMP (5)	8. O C Transpo (300)
1121 Human resources professionals (3,031)	9. Canadian Environmental Assessment Agency (2)	9. Carleton Lodge (200)
1111 Financial auditors and accountants (2,974)	10. Hamilton, City of (2)	10. Ottawa Senior Svc (200)

Sector Employment (Jobs)

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

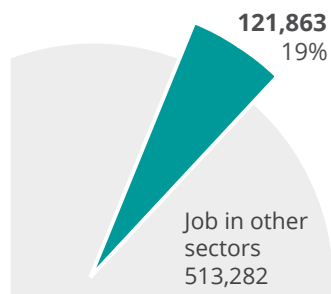
	Region	2013 Jobs	2018 Jobs	Change	% Change
●	Ottawa	122,435	121,863	-572	-0.5%
●	Ontario	431,415	458,998	27,583	6.4%
●	Canada	1,135,872	1,212,484	76,612	6.7%

2018 EMPLOYMENT – A SUBSECTOR VIEW

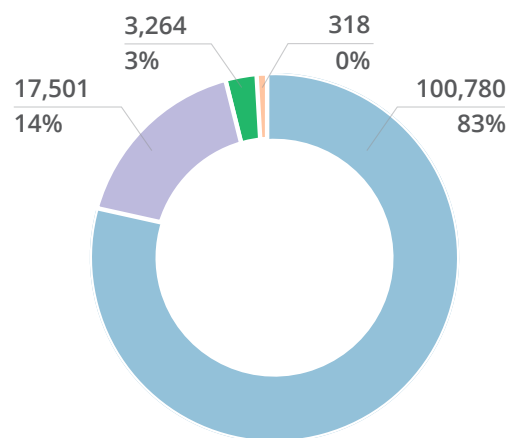
#1

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

Four out of five (83%) of sector jobs are in Federal government public administration



121,863 Sector Jobs in 2018 (19% of all Ottawa Jobs)



■ Federal government public administration
 ■ Local, municipal and regional public administration
 ■ Provincial and territorial public administration
 ■ Aboriginal public administration

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)
911	Federal government public administration	97,185	97,624	95,773	96,612	97,105	100,780	4%	2,366
913	Local, municipal and regional public administration	21,912	22,262	19,642	17,023	17,461	17,501	-20%	-115
912	Provincial and territorial public administration	2,874	2,589	2,681	2,703	3,068	3,264	14%	188
914	Aboriginal public administration	465	440	362	315	302	318	-32%	-13

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

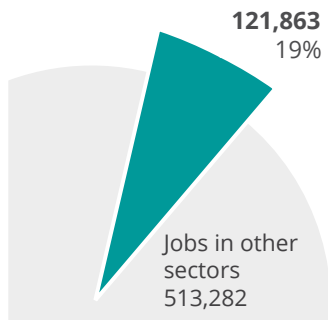
2018 EMPLOYMENT SNAPSHOT – INDUSTRY GROUPS

#1

Ranked **first** out of 13 on specialization

314% above the national average for share of workers in this industry

71% of sector jobs in **Other federal services**



121,863 Sector Jobs in 2018 (19% of all Ottawa jobs)

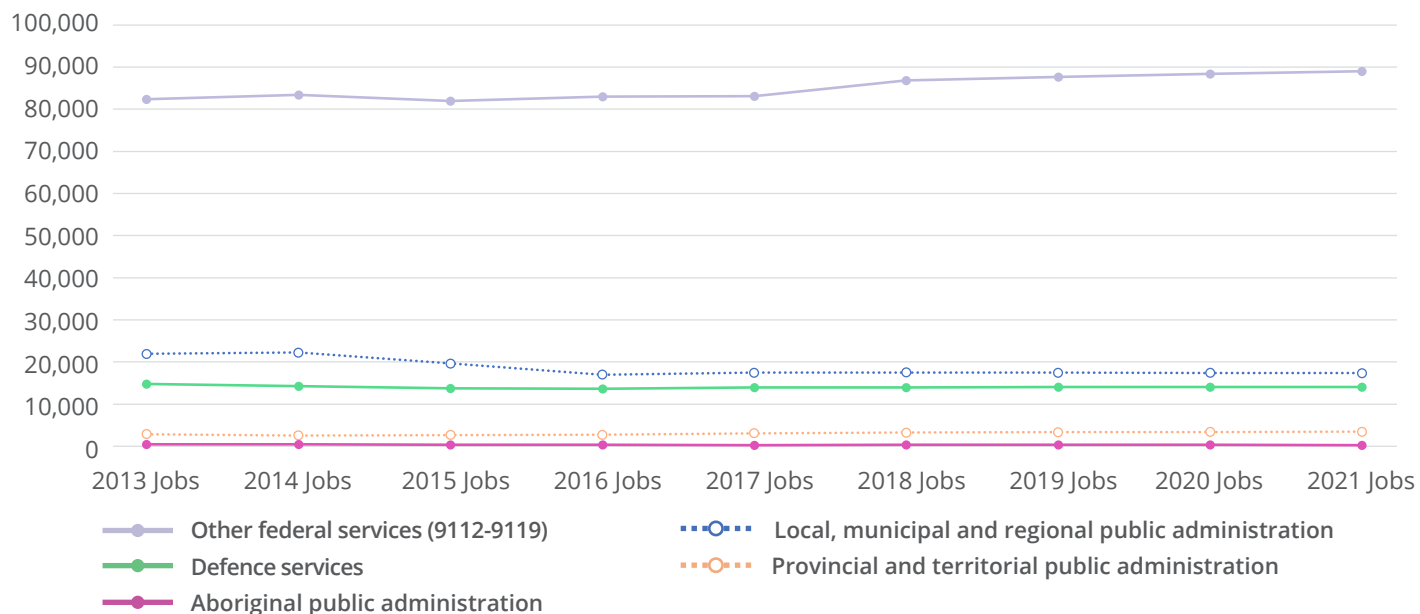


A closer look at share of self-employment:

Ottawa's share of workers in *Other federal services* is more than nine times greater than the Canadian average, but its share of workers in *Provincial and territorial public administration* is 67% 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*

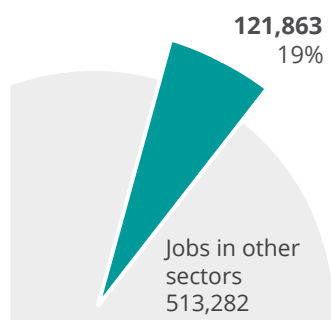
NAICS	Description	2013	2014	2015	2016	2017	2018	% Change (2013-2018)	Forecast change (2018-2021)
9112	Other federal services	82,424	83,389	82,005	82,998	83,136	86,811	5%	2,226
9130	Local, municipal and regional public administration	21,912	22,262	19,642	17,023	17,461	17,501	-20%	-115
9111	Defence services	14,761	14,235	13,768	13,614	13,969	13,969	-5%	140
9120	Provincial and territorial public administration	2,874	2,589	2,681	2,703	3,068	3,264	14%	188
9141	Aboriginal public administration	465	440	362	315	302	318	-32%	-13
	SECTOR TOTAL	122,435	122,915	118,458	116,654	117,936	121,863	-0%	2,426

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

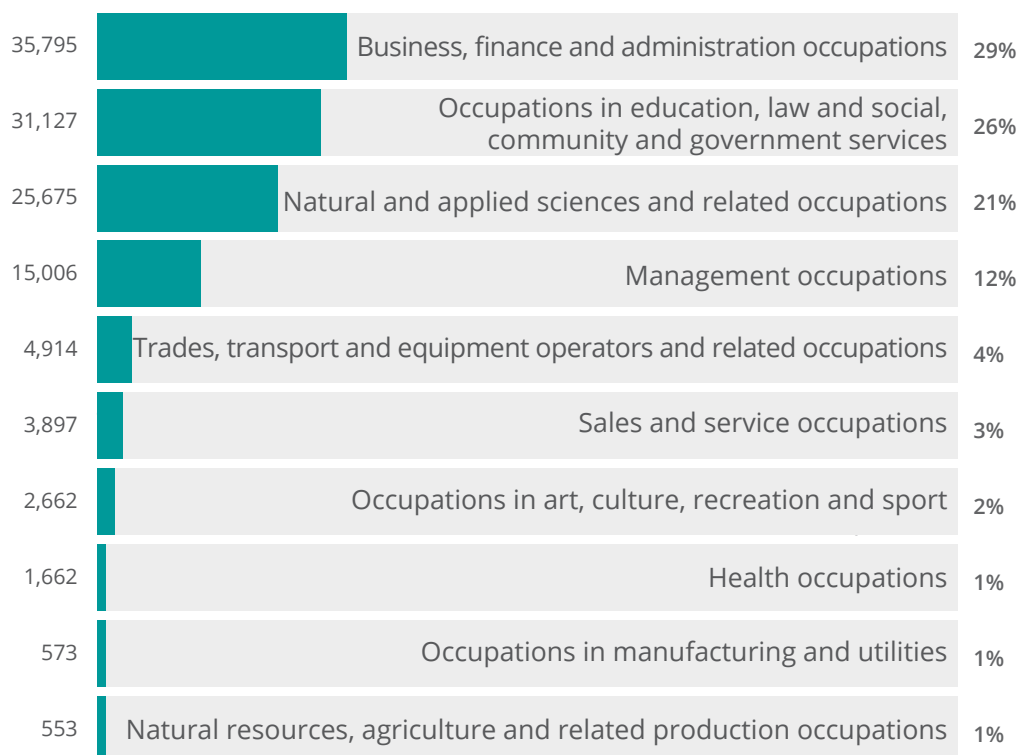
KEY OCCUPATIONS IN THE SECTOR

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

Over three-quarters of sector jobs are Occupations in Business, finance and admin, Education, law and social, community and government services, or Natural and applied sciences and related



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)
4164	Social policy researchers, consultants and program officers	5,241	7,884	2,643	50%	6.5%
2171	Information systems analysts and consultants	4,133	5,501	1,368	33%	4.5%
0414	Other managers in public administration	3,285	4,813	1,528	47%	3.9%
1411	General office support workers	5,082	4,055	-1,027	-20%	3.3%
4168	Program officers unique to government	5,075	4,032	-1,043	-21%	3.3%
4161	Natural and applied science policy researchers, consultants and program officers	3,202	3,489	287	9%	2.9%
2174	Computer programmers and interactive media developers	3,817	3,383	-434	-11%	2.8%
4311	Police officers (except commissioned)	3,576	3,214	-362	-10%	2.6%
1121	Human resources professionals	3,087	3,031	-56	-2%	2.5%
1111	Financial auditors and accountants	2,953	2,974	21	1%	2.4%

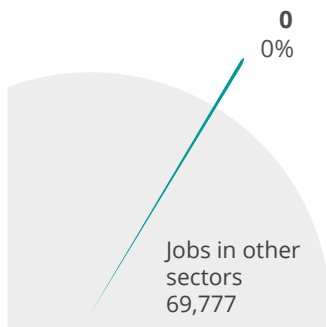
Source: EMSI Analyst 2019

Sector Self-Employment (2018)

SECTOR AT A GLANCE

#13

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



None are self-employed (0% of Ottawa's self-employed)

This is the **only** sector out of 13 that has no self-employed workers

A closer look at share of self-employment:

While none of those working in this sector are self-employed, there may be self-employed workers in other sectors who provide services to the government on a contract basis.

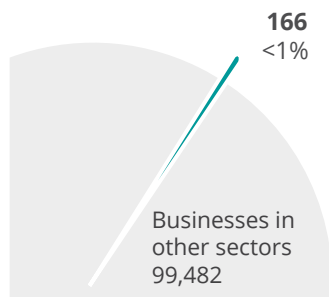
Sector Business & Employer Counts (December 2018)

SECTOR AT A GLANCE

#13

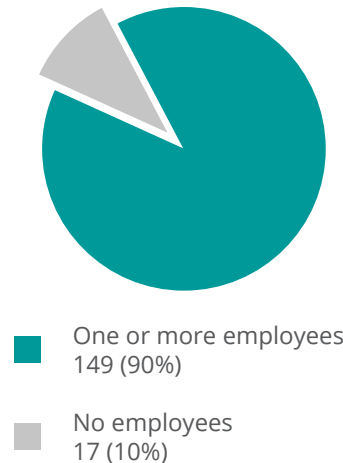
Ranked **last** out of 13 on both number of locations and on number of employers

90% of sector locations have employees currently on payroll

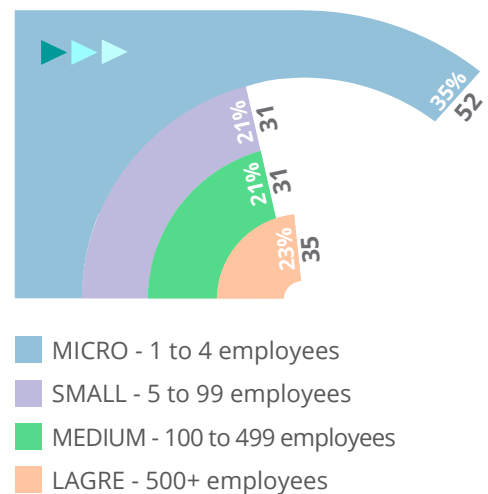


166 Ottawa Businesses (<1% of all businesses)

SECTOR BUSINESSES



SECTOR EMPLOYERS



A closer look at employers:

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

BUSINESS COUNTS AT INDUSTRY GROUP LEVEL

Code	Description	1-4	5-9	10-19	20-49	50-99	100-199	200-499	500+	None	Total
9112	Other federal services (9112-9119)	47	1	3	10	9	15	9	25	14	133
9130	Local, municipal and regional public administration	1	0	1	2	1	1	5	7	2	20
9111	Defence services	3	0	0	0	0	0	0	3	0	6
9120	Provincial and territorial public administration	0	0	1	1	1	0	0	0	1	4
9141	Aboriginal public administration	1	0	1	0	0	0	1	0	0	3

Source: EMSI Analyst 2019

Online Supply & Demand (2018)

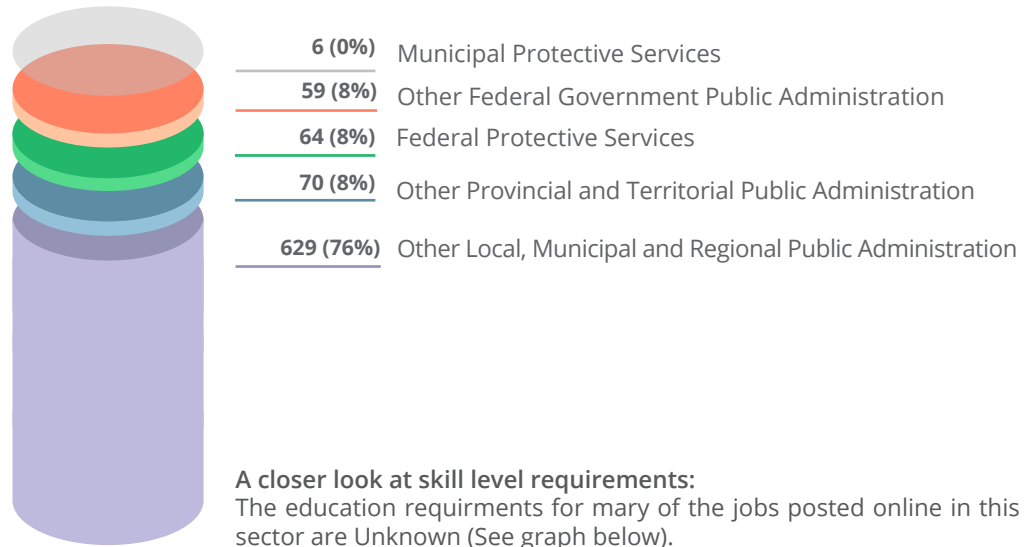
ONLINE JOB POSTINGS

#8

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

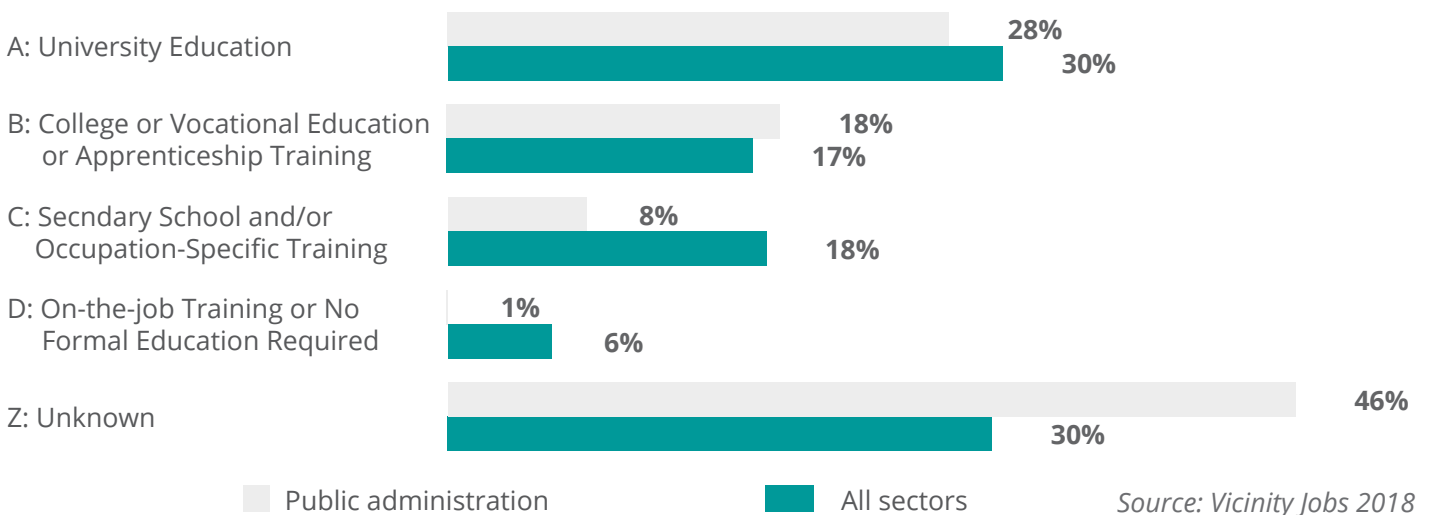
Most ads posted by employers in **Other local, municipal and regional public administration** (76%)

828 Ottawa postings (3% of total postings)



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.



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

Employers	Postings	Percentage
Ottawa, City of	607	73.3%
Ontario Public Service / OPS	70	8.5%
Royal Canadian Mounted Police	59	7.1%
Food Research and Development Centre (FRDC), Agriculture and Agrifood Canada	57	6.9%
North Bay, Corporation of the City of	7	0.8%
Waterloo, Regional Municipality of	7	0.8%
Humane Wildlife Control Inc.	6	0.7%
RCMP	5	0.6%
Canadian Environmental Assessment Agency	2	0.2%
Hamilton, City of	2	0.2%
<i>Grand Total *</i>	828	-

Source: Vicinity Jobs 2018

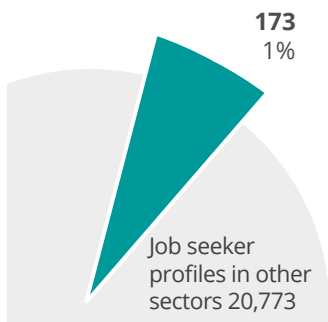
ONLINE JOB SEEKER PROFILES

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.

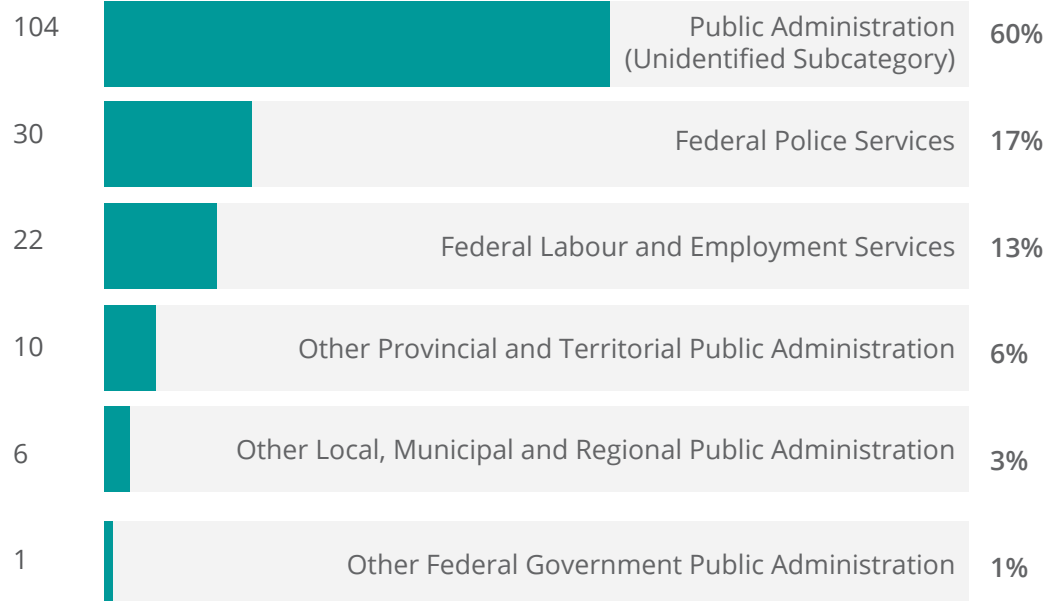
#12

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

60% of profiles posted by job seekers with most recent experience in **Public Administration**



173 Ottawa profiles in 2018 (1% of total profiles)

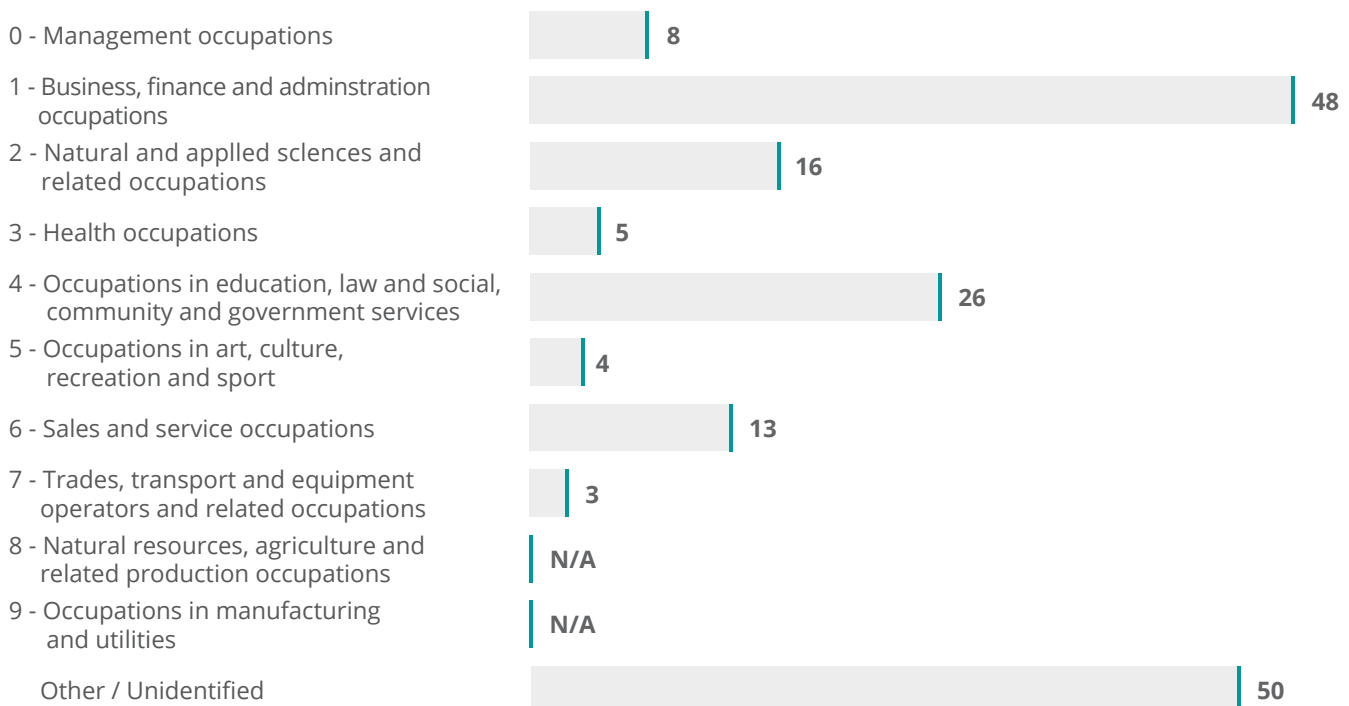


A closer look at occupations for active job profiles:

Of those job profiles where occupation group could be identified, the most (48) were in Business, finance and administration 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 5, 2019 CBC News

[Ottawa throws lifeline to 50 Million Tree Program cut by Ontario government](#)

Following the previous announcement of its closure by the new Ontario government, the federal government has stepped in to provide a \$15 M lifeline to the province's 50 Million Tree Program. The investment spells good news for tree nurseries like Ottawa's Ferguson Tree Centre, which was facing staffing fears amid funding concerns, but will now be able to retain and grow its employee ranks.

May 23, 2019 Government of Canada

[FedDev Ontario Invests in New Program to Support Francophone Entrepreneurs](#)

FedDev Ontario, a federal economic development agency, announced it is providing College La Cite with \$1.35 M in funding for entrepreneurial programming. The money, which will be distributed among 350 Franco-Ontarian businesses, is expected to create or maintain 55 jobs over a 5 year span.

October 24, 2018 CBC News

[Just who are the 7 new councillors headed to city hall?](#)

"The seven councilors-elect who'll be joining Ottawa's council on Dec. 1 are promising more accountability and shifting the municipal political leadership slightly to the left." Three out of the seven councilors elected are women, which increased female representation on Ottawa's city council.

LOSSES

June 18, 2018 Global News

[Ontario premier-designate Doug Ford orders public sector hiring freeze](#)

"Ontario's incoming premier has put the public service under a hiring freeze as part of a series of measures meant to limit spending as he re-examines the province's books, raising concerns among some government workers." There were no major job gains or losses in the public service sector because of the hiring freeze, but potential layoffs were a point of concern. Burden on frontline service jobs were another concern because no new workers would be hired to replace those that retired or left.

June 5, 2019 Betakit

[FedDev Ontario Invests in New Program to Support Francophone Entrepreneurs](#)

The Ontario Centres of Excellence, based in Ottawa, has laid off 28 full-time positions in the wake of budget cuts made by the Ontario Government. Having been earlier stripped in May of half of its \$31 M budget, the organization was forced to make the changes for the purposes of sustainability.

TRENDS/PROJECTIONS

May 17, 2019 Government of Ontario

[Ontario Improving Broadband and Cellphone Connectivity in Eastern Ontario](#)

The Ontario government has pledged \$71 M to improve broadband and cellphone connectivity in the Eastern Ontario region, of which 10 per cent lacks cellular service. The project will combine public and private sector resources to create an estimated 3,000 jobs over the next decade, with projected revenues of \$207 M after costs.

December 19, 2018 Ottawa Sun

[Ottawa cops are out to get you...to join the force](#)

The Ottawa Police are initiating a new social media campaign in an attempt to attract new recruits, with the force aiming to add 30 officers to its ranks annually, up to a total of 300 over the next five years.

November 20, 2018 Ottawa Business Journal

[Ottawa-Gatineau's economic growth to slow in 2019: Conference Board](#)

Job growth of the public administration sector is expected to slow down going into the new year because of decreased federal spending. In the past two years, the public administration sector grew under the Liberal government with 6,300 jobs added to the National Capital Region and is a stark contrast to the 14,300 jobs decrease reported between 2011 and 2015. The decrease in federal spending is estimated to negatively impact job growth in other areas of the nation and province as well.

September 7, 2018 Ottawa Business Journal

[Ottawa-Gatineau unemployment rate edges up to 4.7%](#)

The federal government gained 3,800 workers in the Ottawa-Gatineau region, but the unemployment rate still increased to 4.7% because 1,600 residents were without work.

May 11, 2018 Ottawa Business Journal

[Ottawa-Gatineau unemployment rate sinks to 4.4%](#)

The Ottawa-Gatineau region gained 1,900 federal government jobs in the month of April, which contributed to lowering the unemployment rate to 4.4 per cent.

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 911 - Federal government public administration

<u>Code</u>	<u>Industry group</u>
9111	Defence services
9112	Other federal services

SUBSECTOR NAICS 912 - Provincial and territorial public administration

<u>Code</u>	<u>Industry group</u>
9120	Provincial and territorial public administration

SUBSECTOR NAICS 913 - Local, municipal and regional public administration

<u>Code</u>	<u>Industry group</u>
9130	Local, municipal and regional public administration

SUBSECTOR NAICS 914 - Aboriginal public administration

<u>Code</u>	<u>Industry group</u>
9141	Aboriginal public administration

**Note: Ottawa Employment Hub pulls data for these reports from EMSI Analyst which does not provide the full 4-digit NAICS breakdown for NAICS 91. This means that we do not get the same level of industry group detail as we would if the 4-digit breakdown provided by EMSI matched the true NAICS 4-digit breakdown. For example, the NAICS system includes three industry groups – Provincial protective services, Provincial labour and employment services, and Other provincial and territorial public administration – in the Provincial and territorial public administration subsector. However, EMSI groups the data for all three of these industry groups together under its own industry group category of 'NAICS 9120'. So while this report presents the aggregated numbers, we cannot break the data down into the industry groups recognized by the NAICS classification system. To see the true NAICS breakdown, [click here](#).*

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 Other federal services (NAICS 9112)

86,811

Jobs (2018)

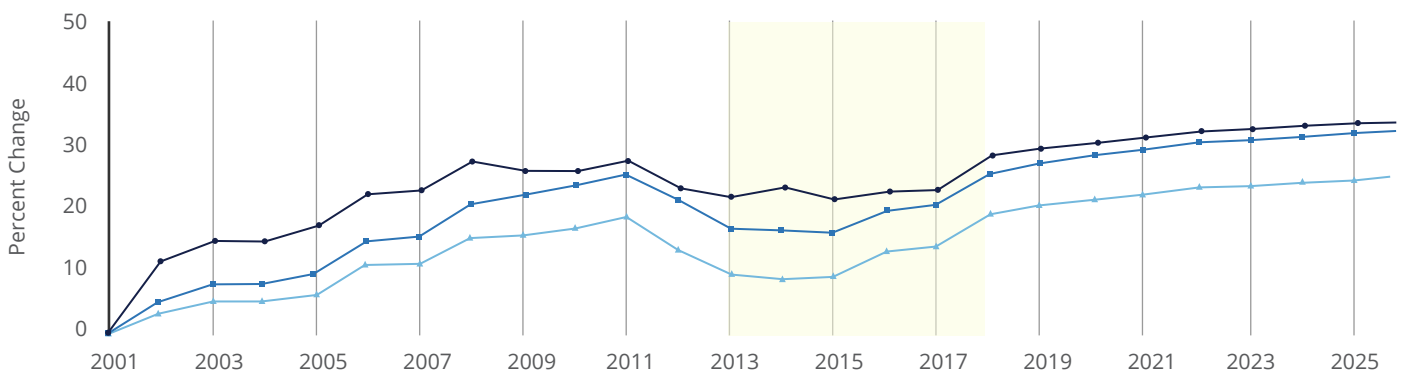
803% above National average

5.3%

% Change (2013-2018)

Nation: 8.5%

Regional Trends



Region	2013 Jobs	2018 Jobs	Change	% Change
● Ottawa	82,424	86,811	4,387	5.3%
● Ontario	125,304	134,826	9,522	7.6%
● Canada	276,538	300,008	23,470	8.5%

Top Occupations Employed by this Industry

Description	Employed in Industry (2018)	% of Total Jobs in Industry (2018)
Social policy researchers, consultants and program officers	7,069	8.1%
Information systems analysts and consultants	4,326	5.0%
Program officers unique to government	3,534	4.1%
Other managers in public administration	3,484	4.0%
Natural and applied science policy researchers, consultants and program officers	3,061	3.5%

Source: EMSI Analyst 2019

Local Employment Planning Council
2019 SECTOR SPOTLIGHT

PUBLIC ADMINISTRATION