



Sectoral Profile

Health care and social assistance

NAICS 62

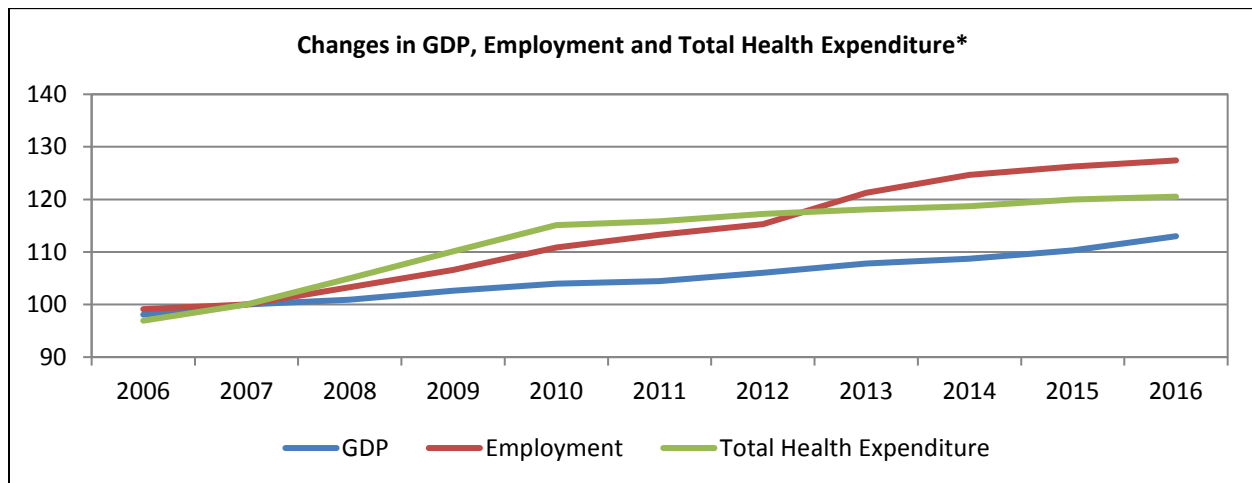
Quebec

2018-2020*



- Sensitive to demographic pressures (growth and aging) and the population’s medical needs, labour requirements are high ...
- ... but the ability to respond to them depends on the availability of qualified staff and on the government’s budget capacity
- In Québec, all regions post consistent employment growth in the long term for health care

Quebec’s population grows and the health of Quebec residents is improving year over year. Life expectancy is increasing for new generations, and people who adopt healthy habits in their lifetime. Since 1996, life expectancy has risen from 78 to 83 years; the median age, the middle point which divides the population into two groups of equal size, rose from 36 to 42 years. People age 65 and over made up 12% of the population in 1996; this proportion is now 18%.



*Data are expressed as indices with 2007 = 100
 Sources: Statistics Canada, GDP – CANSIM 379-0030, Employment – LFS
 Canadian Institute for Health Information – Health Expenditures

No wonder that health spending is rising steadily. According to the *Canadian Institute for Health Information*, Quebec’s total health spending stood at nearly \$54 billion in 2017, 71% of which came from the public sector. This translates into a total average per capita spending of \$6,434 on health services, including \$4,600 in public

* This document is the result of analyses performed using information available as at April 5, 2018.

money. The Canadian total average per capita health spending is \$6,604, including \$4,612 coming from the public sector (70%). The share of public sector in health care finances has been stable for almost 20 years.

In Quebec, health spending is the largest budget item: for the 2016-2017 fiscal year, the Quebec government spent 44% of the provincial budget on what it called the “mission Santé et Services sociaux” [Health and Social Services mission]. Excluding debt servicing, which takes up 11% of the budget, health spending represents half of Quebec government spending.

The Québec government is constantly adding measures, and budgets to implement them, to improve and increase access to health care. Additional hiring to help achieve objectives was mentioned over and over again.

Capital investments increased sharply with numerous investments made in renovating existing infrastructures, add to some establishments to help them achieve their mandate or enhance it, and the construction of new hospitals. After a short break, capital investments are growing again with new projects province-wide.

In the social assistance segment, daycare services have also greatly contributed to employment growth, following their implementation in 1997. According to facts and figures from the Quebec *Ministère de la famille*, there were 293,434 available daycare spots as of March 31, 2017; 79% of these were subsidized for families (early childhood centres or CPE, home-based childcare centres, subsidized daycares). The Québec government also added measures to support organizations involved in social services and additional daycare spots.

Overall, the employment outlook in health and social assistance remains excellent.

Sectoral Dynamics for the Regions

Québec 2018-2020	In the Economic Regions	AAGR
Annual average growth: 1.5% Gain of approx.: 26,700 positions Yearly dynamics: 2018: ↗ 2019: ↗ 2020: ↗	Lanaudière	1.6%
	Outaouais	1.5%
	QUÉBEC	1.5%
	Laurentides	1.5%
	Centre-du-Québec	1.5%
	Montréal CMA	1.5%
	Mauricie	1.5%
	Montréal	1.5%
	Chaudière-Appalaches	1.4%
	Capitale-Nationale	1.4%
	Estrie	1.3%
	Abitibi-Témiscamingue	1.2%
	Saguenay-Lac-Saint-Jean	1.1%
	Gaspésie-Les-Îles	1.0%
	Bas-Saint-Laurent	1.0%
Côte-Nord / Nord-du-Québec	0.6%	

n/a: not applicable

Source: 2018–2020 Sectoral Outlook annual exercise

Labour Market Analysis Directorate, Service Canada – Quebec Region, April 5, 2018.

With over half of the sector's workforce, the following occupations in the health care and social assistance sector are the most likely to be affected by the anticipated dynamics in the various activity sub-sectors (according to the occupation by industry matrix):

- 3012 Registered nurses and registered psychiatric nurses
- 4214 Early childhood educators and assistants
- 3413 Nurse aides, orderlies and patient service associates
- 3233 Licensed practical nurses
- 4212 Social and community service workers
- 6731 Light duty cleaners
- 4412 Home support workers, housekeepers and related occupations
- 4152 Social workers
- 6711 Food counter attendants, kitchen helpers and related support occupations
- 3112 General practitioners and family physicians
- 3111 Specialist physicians
- 4215 Instructors of persons with disabilities
- 1414 Receptionists
- 6322 Cooks
- 4151 Psychologists
- 0311 Managers in health care
- 1243 Medical administrative assistants
- 4153 Family, marriage and other related counsellors
- 3142 Physiotherapists
- 3222 Dental hygienists and dental therapists
- 3215 Medical radiation technologists
- 4411 Home child care providers
- 3411 Dental assistants
- 3414 Other assisting occupations in support of health services
- 3234 Paramedical occupations.

SIZE AND DISTRIBUTION OF AND CHANGES IN EMPLOYMENT IN THE INDUSTRY IN QUEBEC

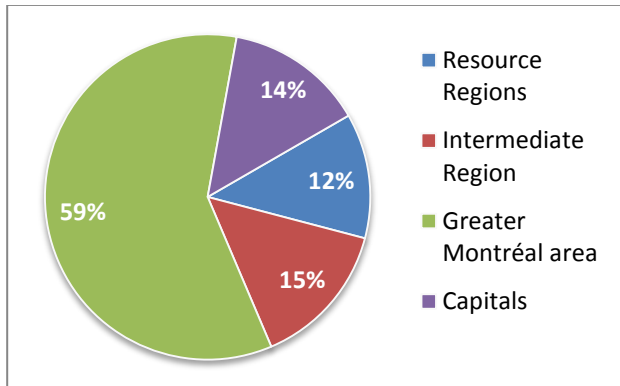
	Employment 2015–2017 Average			10-year Change in Employment	
	Employment In thousands	Provincial distribution	Regional employment share	In thousands	as a %
All of Quebec	578.7	100.0%	13.9%	128.7	28.6%
Resource Regions					
Abitibi-Témiscamingue	11.5	2.0%	15.8%	1.6	15.8%
Bas-Saint-Laurent	15.3	2.6%	17.9%	3.0	24.1%
Côte-Nord / Nord-du-Québec	8.7	1.5%	16.4%	2.0	29.7%
Gaspésie-Îles-de-la-Madeleine	8.0	1.4%	22.2%	1.9	31.1%
Saguenay-Lac-Saint-Jean	20.1	3.5%	15.7%	3.6	22.0%
Intermediate Regions					
Centre-du-Québec	15.9	2.7%	13.2%	4.3	36.8%
Chaudière-Appalaches	31.8	5.5%	14.7%	7.5	31.1%
Estrie	26.6	4.6%	17.2%	8.1	43.9%
Mauricie	18.8	3.2%	15.8%	2.6	15.8%
Greater Montréal area					
Lanaudière	40.0	6.9%	15.7%	11.8	41.6%
Laurentides	40.6	7.0%	13.2%	10.3	34.0%
Laval	32.9	5.7%	15.4%	12.1	58.5%
Montréal	101.8	17.6%	13.0%	22.9	29.1%
Montréal	117.9	20.4%	11.8%	12.9	12.3%
Capitals					
Capitale-Nationale	62.6	10.8%	15.5%	17.0	37.3%
Outaouais	26.2	4.5%	13.1%	7.1	36.9%

x: confidential data, fewer than 1,500 people employed in this region

Source: Historical estimates based on Statistics Canada's Labour Force Survey

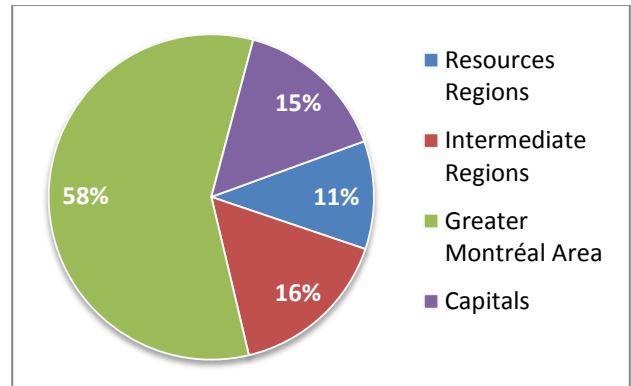
SOME CHARACTERISTICS OF THE INDUSTRY IN QUÉBEC

Establishment distribution by Region



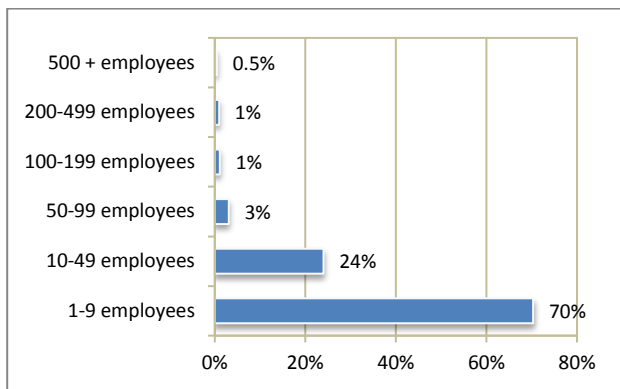
Source: Statistics Canada, Establishment Counts by Economic Region, industry, and Employee Size Ranges, December 2015

Employment distribution by Region



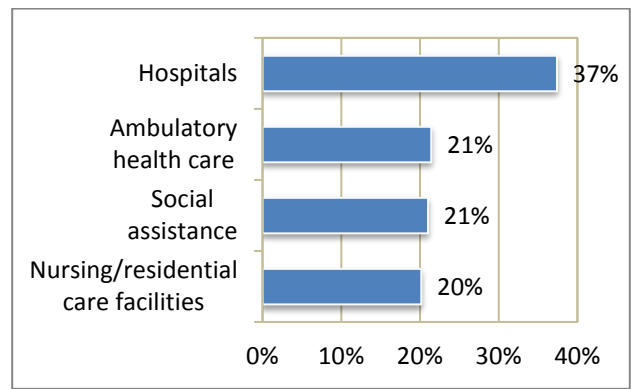
Source: Statistics Canada, Labour Force Survey; based on average employment in 2014-2016

Size of establishment



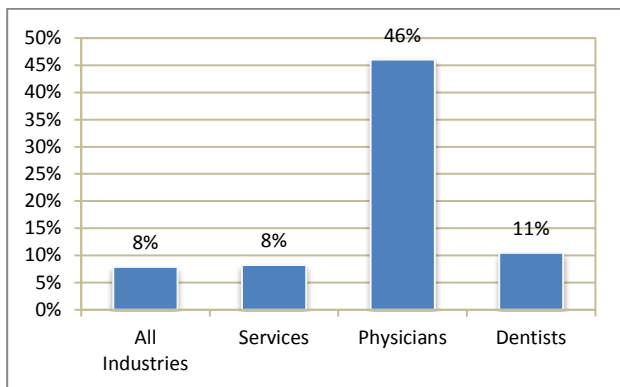
Source: Statistics Canada, Establishment Counts by Economic Region, industry, and Employee Size Ranges, December 2015

Employment by industry segment



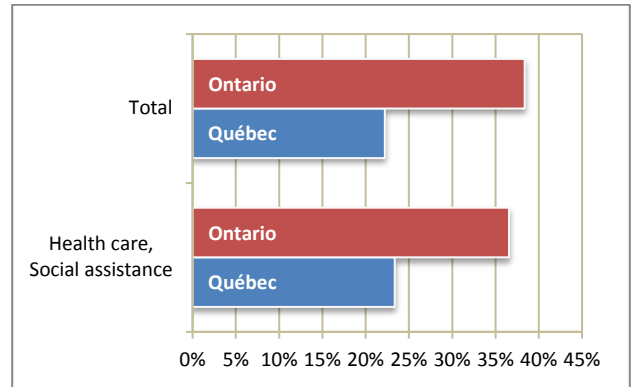
Source: Statistics Canada, Survey of Employment, Payrolls and Hours; based on average employment in 2014-2016

Self-employed jobs compared to Total employment



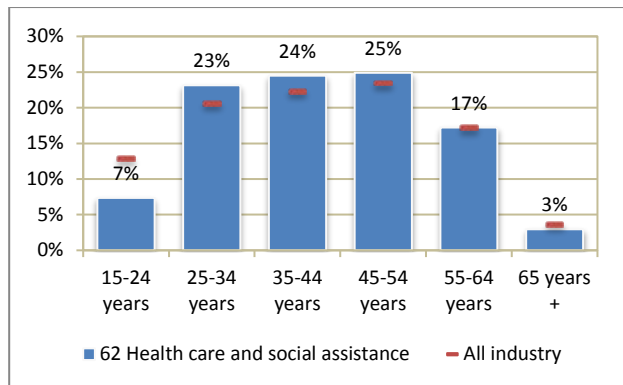
Source: Statistics Canada, CANSIM 383-0031 Labour statistics, based on average employment in 2014-2016

Share of total employment and industry in Canada



Source: Statistics Canada, Survey of Employment, Payrolls and Hours; based on average employment in 2014-2016

Employed Labour Force Aged 15 Years and Over



Source: Statistics Canada, 2016 Census, special tabulation for ESDC

Employment distribution by skill type

National Occupational Classification	
0. Management	3%
1. Business, finance and administration	12%
2. Natural and applied sciences and related	1%
3. Health	47%
4. Education, law and social, community and government services	26%
5. Art, culture, recreation and sport	1%
6. Sales and service	8%
7. Trades, transport and equipment operators	1%
8. Natural resources, agriculture and related production	0%
9. Manufacturing and utilities	0%

Source: Statistics Canada, 2016 Census, special tabulation for ESDC

FOR MORE INFORMATION

- Job Bank (Canada) – [Job Market Trends and News](#): Information on job, skills and local labour market trends is important for making career decisions. In addition, information on wages, labour supply, labour demand and other factors helps employers recruit, train and retain workers and make business and investment decisions.
- North American Industry Classification System (NAICS) Canada 2012: Health care and social assistance [NAICS 62](#)

Note: In preparing this document, the authors have taken care to provide clients with labour market information that is timely and accurate at the time of publication. Since labour market conditions are dynamic, some of the information presented here may have changed since this document was published. Users are encouraged to also refer to other sources for additional information on the local economy and labour market. Information contained in this document does not necessarily reflect official policies of Employment and Social Development Canada.

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For further information, please contact the LMI team at:

http://www.esdc.gc.ca/cgi-bin/contact/edsc-esdc/eng/contact_us.aspx?section=lmi

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