



Health Care and Social Assistance

Metro Chicago

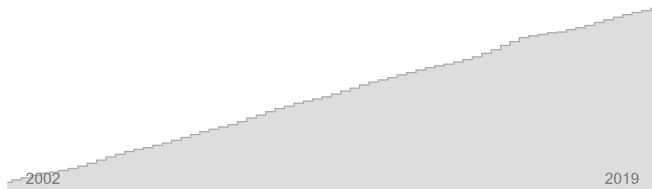


Industry Spotlight

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Health Care and Social Assistance Metro Chicago – 2019Q2

EMPLOYMENT



591,533

Regional employment / **22,727,882** in the nation

WAGES



\$54,593

Avg Wages per Worker / **\$52,475** in the nation

1.6% ↑

Avg Ann % Change Last 10
+2.1% in the U.S.



13.0%

% of Total Employment /
14.4% in the U.S.

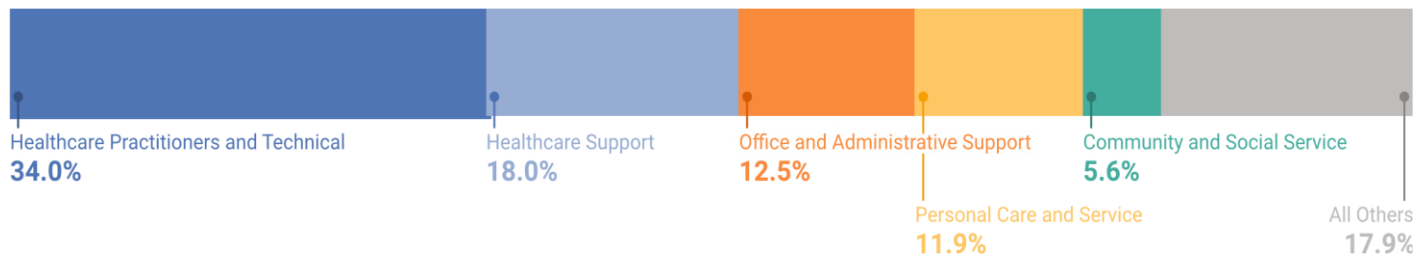


2.0% ↑

Avg Ann % Change Last 10 Years /
+2.0% in the U.S.



TOP OCCUPATION GROUPS



TOP INDUSTRIES

Avg Ann % Change in Employment, Last 10 Years

2.3 % ↑

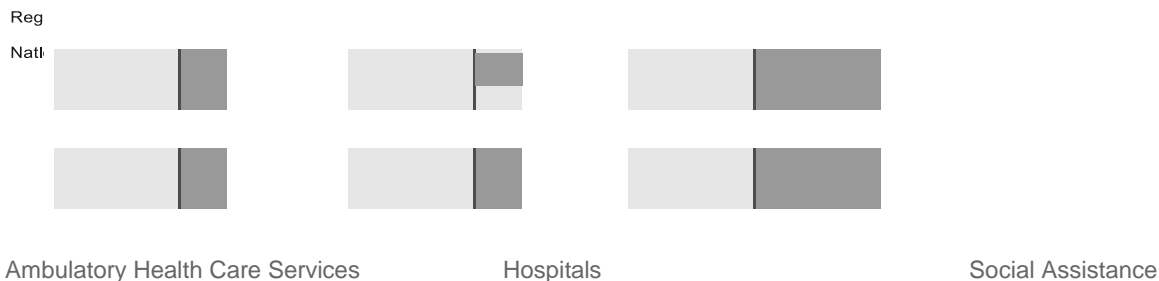
0.4 % ↑

Region
Nation

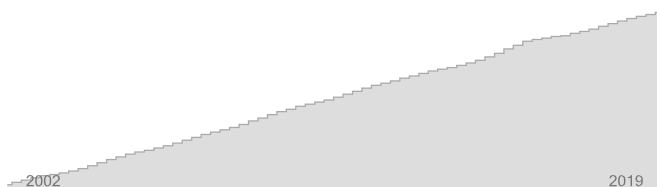
2.9 % ↑

Region
Nation

Source: JobsEQ®, <http://www.chmuraecon.com/jobseq3>



Industry Snapshot EMPLOYMENT



WAGES

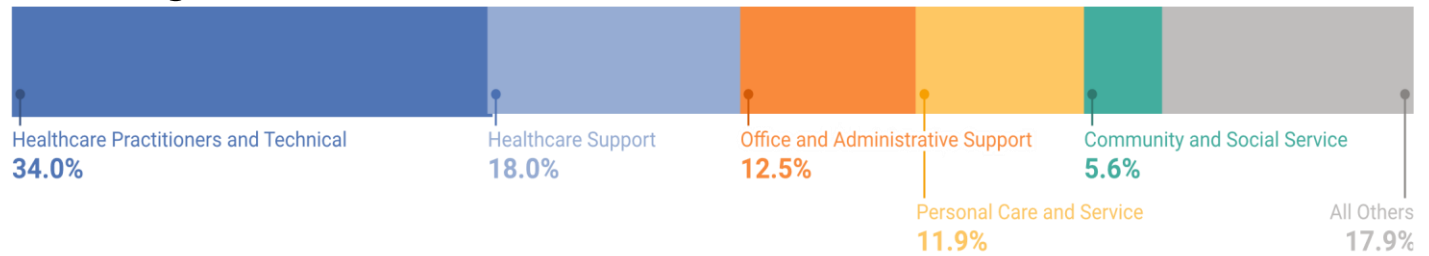


3-Digit Industry	Empl	Avg Ann Wages	LQ	5yr History	Annual Demand	Forecast Ann Growth
Ambulatory Health Care Services	201,630	\$62,507	0.86		21,698	2.1%
Hospitals	186,732	\$73,561	1.00		14,406	0.0%
Social Assistance	117,805	\$25,994	0.91		16,266	1.8%
Nursing and Residential Care Facilities	85,367	\$33,987	0.83		9,999	0.6%
Health Care and Social Assistance	591,533	\$54,593	0.90		62,874	1.2%


💡 Employment is one of the broadest and most timely measures of a region's economy. Fluctuations in the number of jobs shed light on the health of an industry. A growing employment base creates more opportunities for regional residents and helps a region grow its population.

💡 Since wages and salaries generally compose the majority of a household's income, the annual average wages of a region affect its average household income, housing market, quality of life, and other socioeconomic indicators.

Staffing Pattern



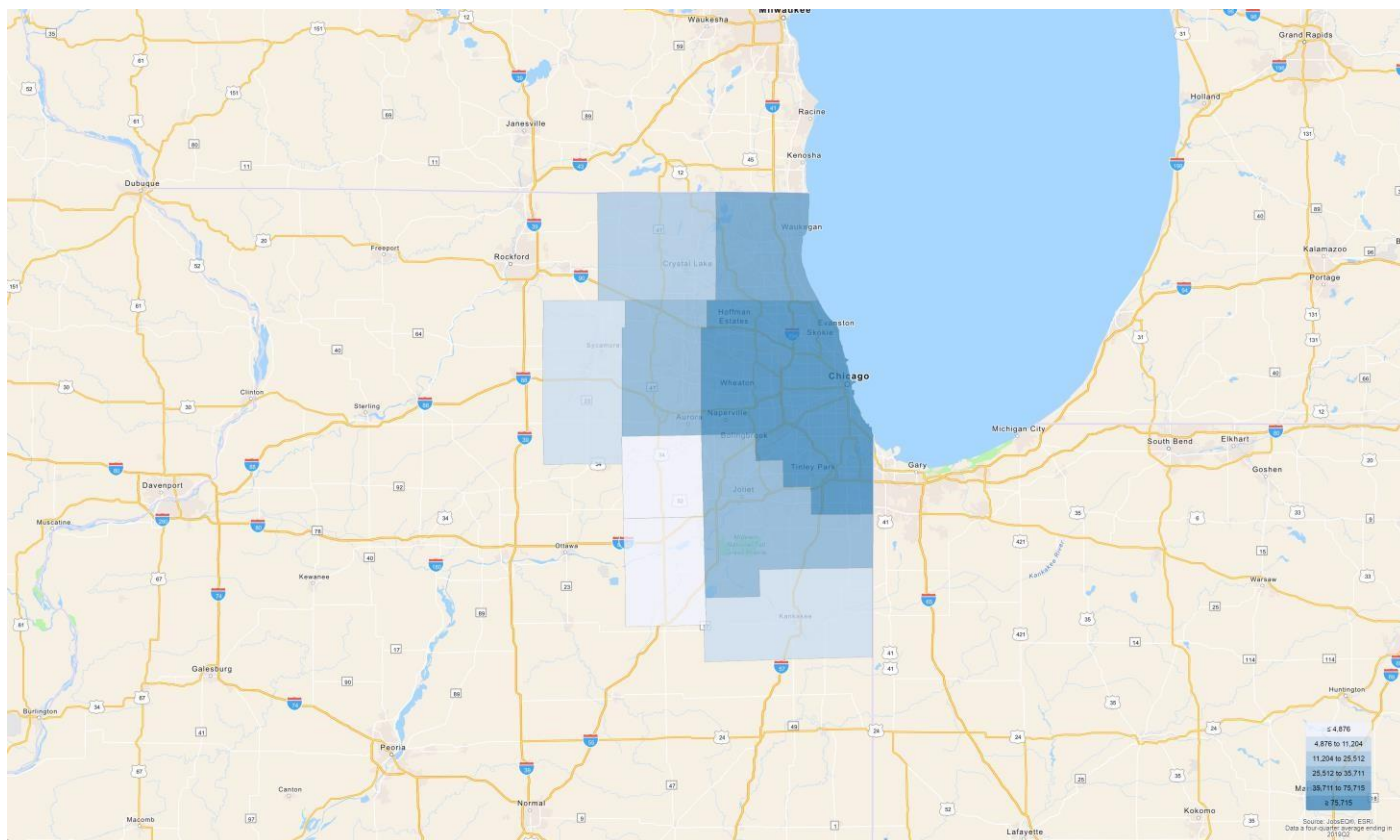
6-digit Occupation	Empl	Avg Ann Wages	Annual Demand
Registered Nurses	78,816	\$78,300	4,648
Personal Care Aides	43,616	\$24,800	8,074
Nursing Assistants	38,275	\$30,200	4,443
Home Health Aides	23,732	\$25,300	3,866
Childcare Workers	18,739	\$24,400	2,763
Medical Assistants	15,740	\$37,000	2,077
Office Clerks, General	13,494	\$37,600	1,628
Receptionists and Information Clerks	13,124	\$32,600	1,927
Licensed Practical and Licensed Vocational Nurses	12,967	\$55,700	980
Medical Secretaries	11,997	\$37,700	1,500
Remaining Component Occupations	321,011	\$62,700	31,776
Total	591,533		

 The mix of occupations points to the ability of a region to support an industry and its flexibility to adapt to future demand. Industry wages are a component of the cost of labor for regional employers.

Geographic Distribution

Lake County, Illinois	35,712
Will County, Illinois	28,399
Kane County, Illinois	25,512

McHenry County, Illinois	11,204
Kankakee County, Illinois	9,335
DeKalb County, Illinois	4,876
Grundy County, Illinois	2,460
Kendall County, Illinois	1,970



Region	Empl	Region	Empl
	396,348		
DuPage County, Illinois	75,716		
Cook County, Illinois			

Source: JobsEQ®



A geographic concentration of firms in related fields of business may reduce production costs, attract more suppliers and customers, and increase supply and demand for specialized labor, but may also increase competitive pressure and drive down prices.

Drivers of Employment Growth

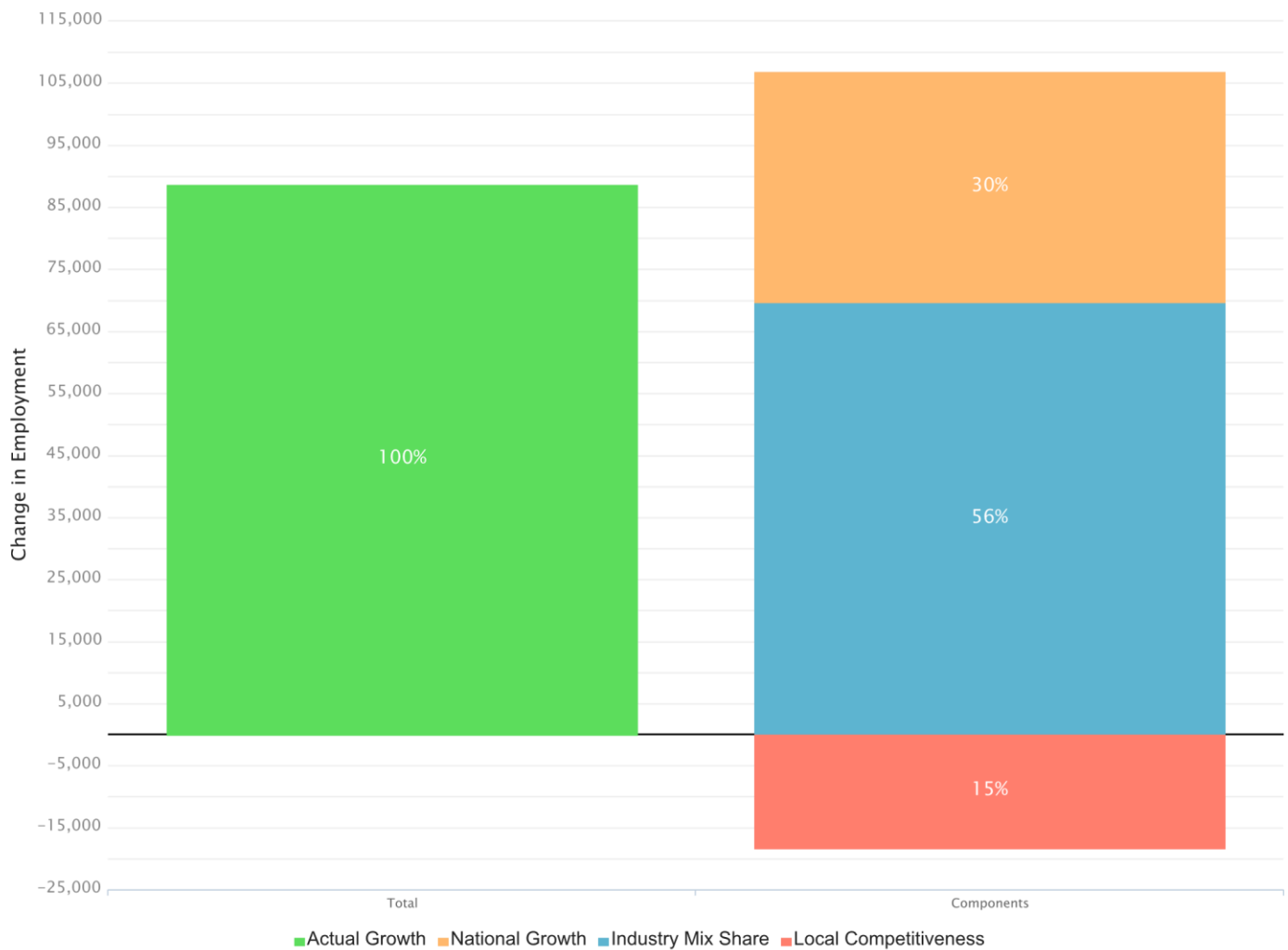
Over the ten years ending 2018, employment in Health Care and Social Assistance for the Metro Chicago added 88,620 jobs. After adjusting for national growth during this period and industry mix share, the part of this employment change due to local competitiveness was a loss of 18,280 jobs—meaning this industry was less competitive than its national counterpart during this period.


Source: JobsEQ®, <http://www.chmuraecon.com/jobseq> 7


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Drivers of Employment Growth for Metro Chicago



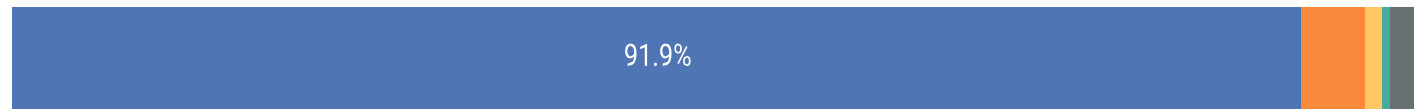
 Shift-share analysis sheds light on the factors that drive regional employment growth in an industry. A positive change in local competitiveness indicates advantages that may be due to factors such as superior technology, management, and labor pool, etc.

 National growth is due to the overall growth or contraction in the national economy. Industry mix share is the growth attributable to the specific industries examined (based on national industry growth patterns and the industry mix of the region).

Employment Distribution by Type

The table below shows the employment mix by ownership type for Health Care and Social Assistance for the Metro Chicago. Four of these ownership types — federal, state, and local government and the private sector — together constitute “Covered Employment” (employment covered by the Unemployment Insurance programs of the United States and reported via the Quarterly Census of Employment and Wages).

“Self-Employment” refers to unincorporated self-employment and represents workers whose primary job is selfemployment (that is, these data do not include workers whose primary job is a wage-and-salary position that is supplemented with self-employment).



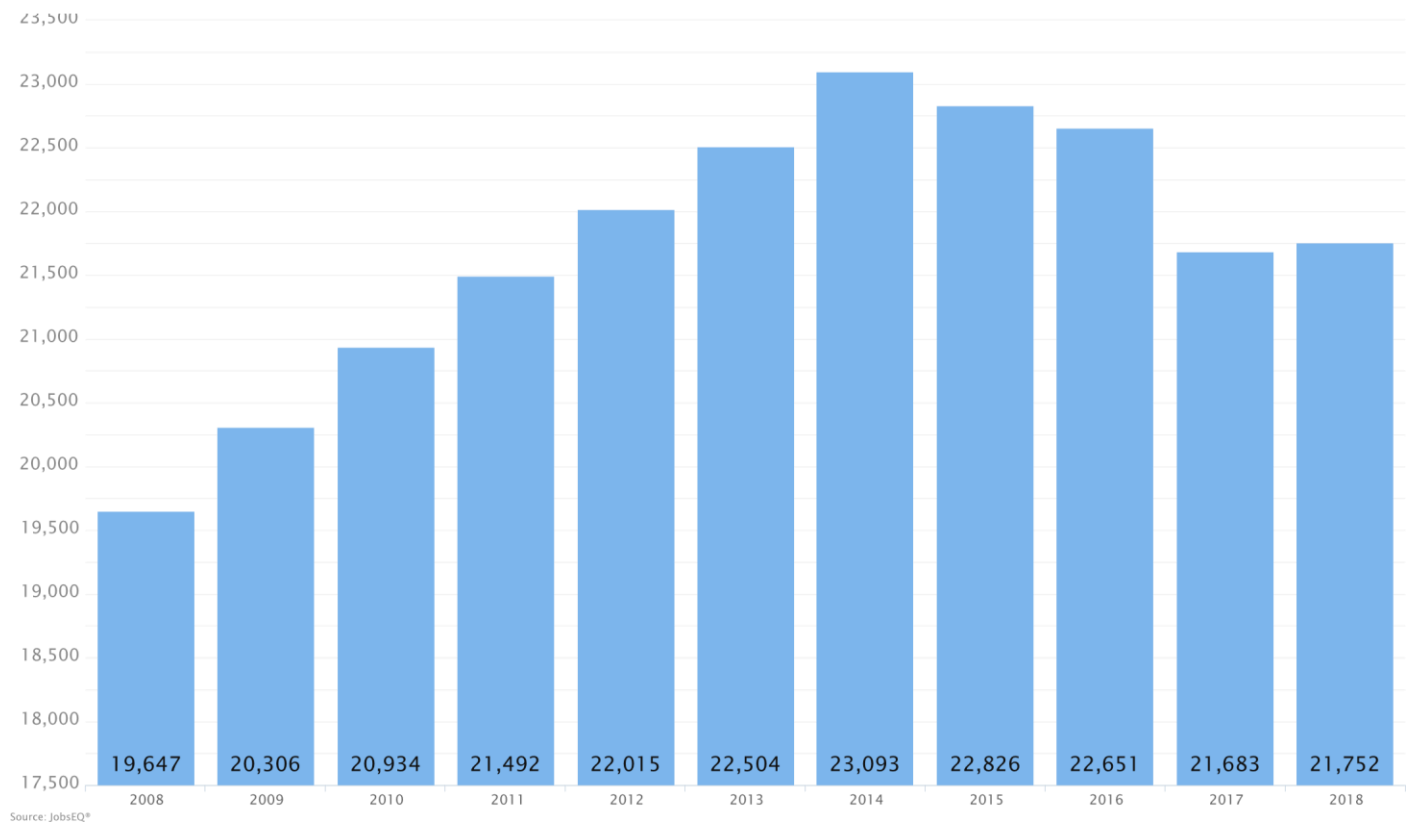
	Empl	%
Private	543,805	91.9%
Self-Employment	27,671	4.7%
Local Government	6,505	1.1%
State Government	3,976	0.7%
Federal Government	9,576	1.6%
Other Non-Covered	0	0.0%


Source: JobsEQ®

💡 Strong entrepreneurial activity is indicative of growing industries. Using self-employment as a proxy for entrepreneurs, a higher share of self-employed individuals within a regional industry points to future growth.

Establishments

In 2018, there were 21,752 Health Care and Social Assistance establishments in the Metro Chicago (per covered employment establishment counts), an increase from 19,647 establishments ten years earlier in 2008.

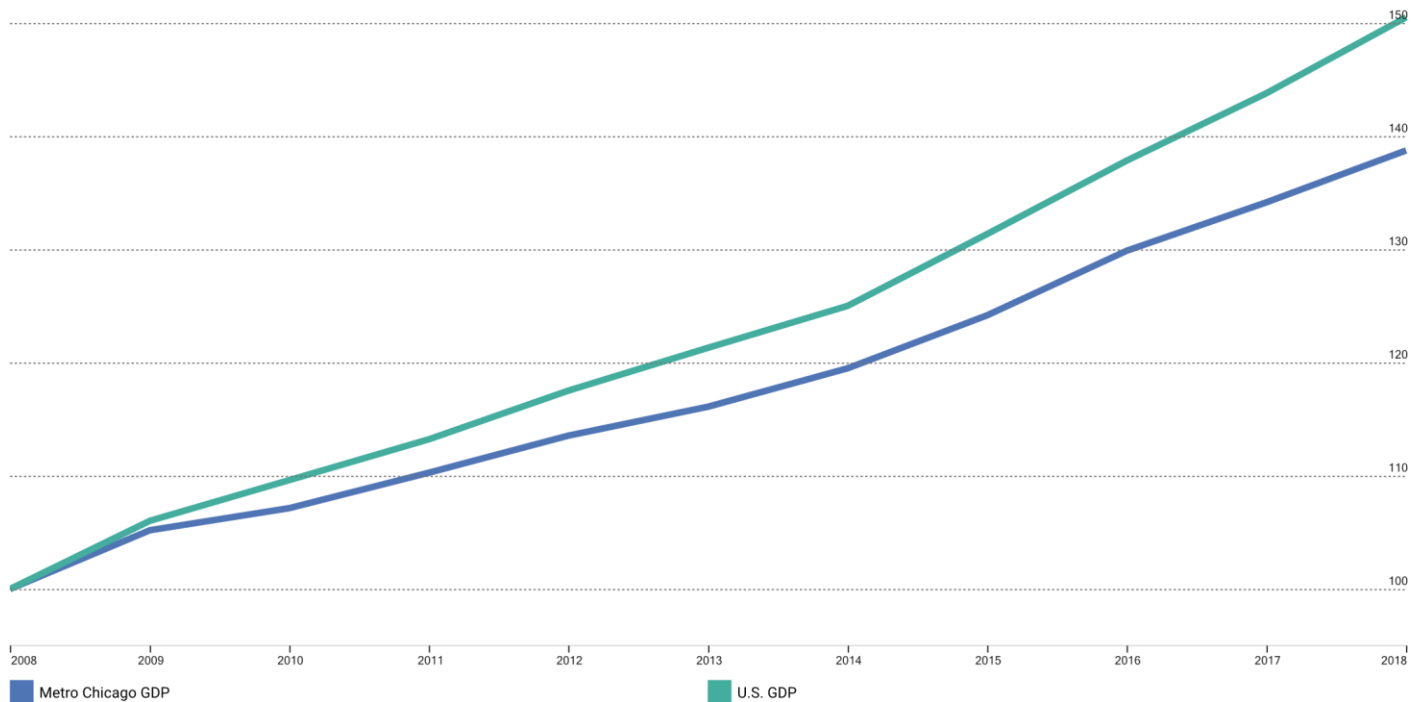


 New business formations are an important source of job creation in a regional economy, spurring innovation and competition, and driving productivity growth. Establishment data can provide an indicator of growth in businesses by counting each single location (such as a factory or a store) where business activity takes place, and with at least one employee.

GDP & Productivity

In 2018, Health Care and Social Assistance produced \$47 billion in GDP for the Metro Chicago.

GDP: Indexed 2008 = 100



7.1 %

Industry Share of Total GDP / Worker /

8.6 % in the nation



3.3 % ↑

Avg Ann % Change Last 10 Yrs /

4.2 % in the nation



\$131k

Output per

\$128k in the nation




💡 Gross domestic product (GDP) is the most comprehensive measure of regional economic activity, and an industry's contribution to GDP is an important indicator of regional industry strength. It is a measure of total value added to a regional economy in the form of labor income, proprietor's income, and business profits, among others.

💡 Growth in productivity (output per worker) leads to increases in wealth and higher average standards of living in a region.

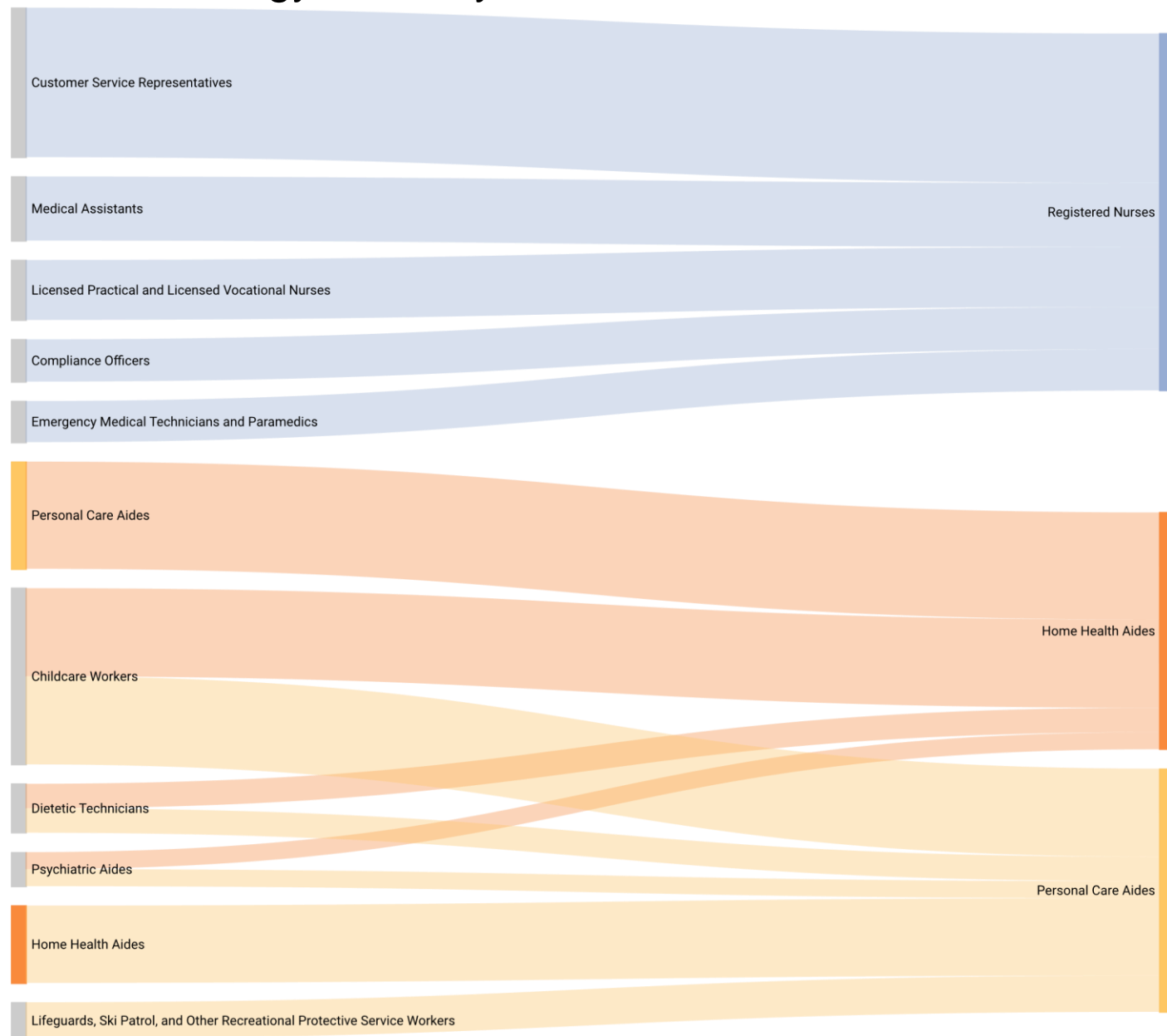
Supply Chain: Top Suppliers


As of 2019Q2, Health Care and Social Assistance in the Metro Chicago are estimated to make \$5.3 billion in annual purchases from suppliers in the United States with about 52% or \$2.8 billion of these purchases being made from businesses located in the Metro Chicago.

3-digit Supplier Industries	Purchases from In-Region (\$M)	Purchases from Out-of-Region (\$M)
Real Estate	\$453.9	\$310.8
Professional, Scientific, and Technical Services	\$385.3	\$246.3
Insurance Carriers and Related Activities	\$168.9	\$365.6
Administrative and Support Services	\$274.2	\$90.0
Chemical Manufacturing	\$118.0	\$118.9
Remaining Supplier Industries	\$1,361.9	\$1,400.7
Total	\$2,762.3	\$2,532.2

 Supplier-buyer networks can indicate local linkages between industries, regional capacity to support growth in an industry, and potential leakage of sales out of the region.

Sector Strategy Pathways



 The graphics on this page illustrate relationships and potential movement (from left to right) between occupations that share similar skill sets. Developing career pathways as a strategy promotes industry employment growth and workforce engagement.

Postsecondary Programs Linked to Health Care and Social Assistance

Source: JobsEQ®, <http://www.chmuraecon.com/jobseq> 13

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Program	Awards
Chamberlain University-Illinois	
Family Practice Nurse/Nursing	1,935
Nursing Practice	245
Registered Nursing/Registered Nurse	9,286
City Colleges of Chicago-Malcolm X College	
Nursing Assistant/Aide and Patient Care Assistant/Aide	404
College of DuPage	
Nursing Assistant/Aide and Patient Care Assistant/Aide	339
College of Lake County	
Emergency Care Attendant (EMT Ambulance)	201
Nursing Assistant/Aide and Patient Care Assistant/Aide	406
DeVry University-Illinois	
Health Information/Medical Records Technology/Technician	1,449
Resurrection University	
Registered Nursing/Registered Nurse	349
William Rainey Harper College	
Nursing Assistant/Aide and Patient Care Assistant/Aide	699

Source: JobsEQ®



The number of graduates from postsecondary programs in the region identifies the pipeline of future workers as well as the training capacity to support industry demand.



Among postsecondary programs at schools located in the the Metro Chicago, the sampling above identifies those most linked to occupations relevant to Health Care and Social Assistance.

Region Definition

Metro Chicago is defined as the following counties:

Cook County, Illinois

DeKalb County, Illinois

DuPage County, Illinois

Grundy County, Illinois

Kane County, Illinois

Kankakee County, Illinois

Kendall County, Illinois

Lake County, Illinois

McHenry County, Illinois

Will County, Illinois

Source: JobsEQ®, <http://www.chmuraecon.com/jobseq> 14

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Data Notes

- Industry employment and wages (including total regional employment and wages) are as of 2019Q2 and are based upon BLS QCEW data, imputed by Chmura where necessary, and supplemented by additional sources including Census ZBP data. Employment forecasts are modeled by Chmura and are consistent with BLS national-level 10-year forecasts.
- Occupation employment is as of 2019Q2 and is based on industry employment and local staffing patterns calculated by Chmura and utilizing BLS OES data. Occupation wages are per the BLS OES data and are as of 2018.
- GDP is derived from BEA data and imputations by Chmura. Productivity (output per worker) is calculated by Chmura using industry employment and wages as well as GDP and BLS output data. Supply chain modeling including purchases by industry are developed by Chmura.
- Postsecondary awards are per the NCES and are for the 2017-2018 academic year.
- Establishment counts are per the BLS QCEW data.
- Figures may not sum due to rounding.

FAQ

What is (LQ) location quotient?

Location quotient is a measurement of concentration in comparison to the nation. An LQ of 1.00 indicates a region has the same concentration of an industry (or occupation) as the nation. An LQ of 2.00 would mean the region has twice the expected employment compared to the nation and an LQ of 0.50 would mean the region has half the expected employment in comparison to the nation.

What is annual demand?

Annual demand is a of the sum of the annual projected growth demand and separation demand. Separation demand is the number of jobs required due to separations—labor force exits (including retirements) and turnover resulting from workers moving from one occupation into another. Note that separation demand does not include all turnover—it does not include when workers stay in the same occupation but switch employers. Growth demand is the increase or decrease of jobs expected due to expansion or contraction of the overall number of jobs.

What is the difference between industry wages and occupation wages?

Industry wages and occupation wages are estimated via separate data sets, often the time periods being reported do not align, and wages are defined slightly differently in the two systems (for example, certain bonuses are included in the industry wages but not the occupation wages). It is therefore common that estimates of the average industry wages and average occupation wages in a region do not match exactly.