



Australian Government
Department of Education, Employment
and Workplace Relations



Employment Outlook for Health Care and Social Assistance



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Introduction

The Health Care and Social Assistance industry is the second largest industry in Australia, employing 1 146 300 people (or 10.6 per cent of the total workforce) as at February 2009.

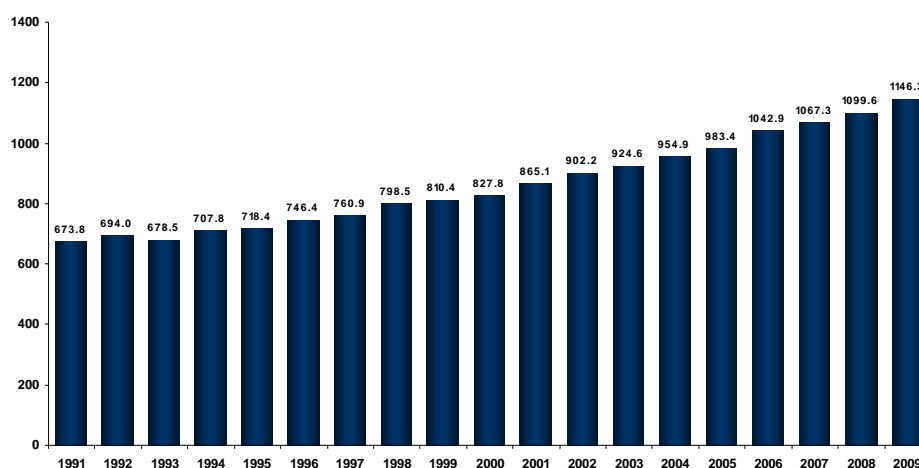
The industry is roughly divided into eight sectors and includes: Hospitals; Medical Services; Pathology and Diagnostic Imaging Services; Allied Health Services; Other Health Care Services; Residential Care Services; Child Care Services; and Other Social Assistance Services.

The discussion below focuses on employment characteristics, trends and prospects in the Health Care and Social Assistance industry, and highlights specific sectors where job growth is strongest. The analysis of characteristics includes workforce ageing, employment share by gender, educational profile, weekly earnings, average hours worked, regional and occupational employment.

Employment Growth

Employment in the Health Care and Social Assistance industry has shown strong long-term growth. In the 10 years to February 2009, employment in Health Care and Social Assistance rose by 335 900 or 41.5 per cent to 1 146 300, which is the highest level since the Department of Education, Employment and Workplace Relations (DEEWR) trended series began in November 1984 (see Figure 1). This represents an average annual growth rate of 3.5 per cent.

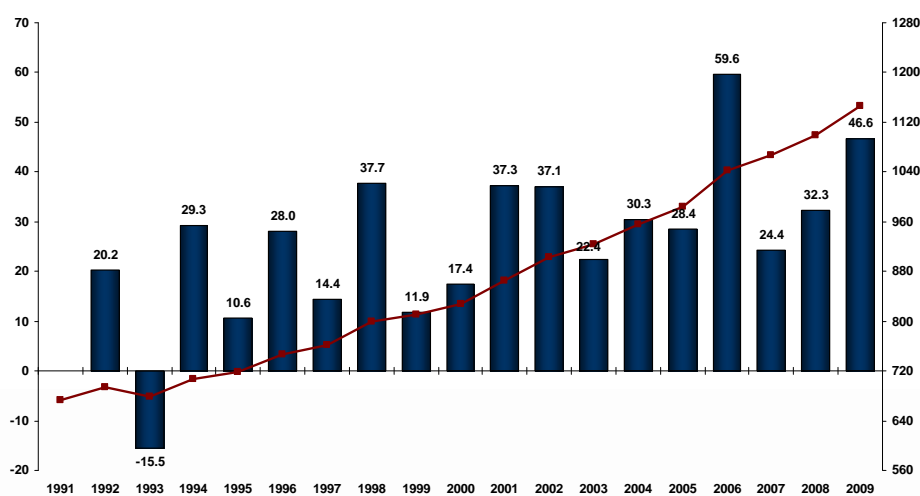
Figure 1: Employment Level ('000s) - February 1991 to February 2009



Source: ABS Labour Force Survey (DEEWR trend data)

The largest annual employment gain was an increase of 59 600 in the year to February 2006 (see Figure 2). Employment in the Health Care and Social Assistance industry is influenced by several factors such as the ageing of the population, the demand for new and improved health services, technological changes, government budget pressures, the growth of community and home based services and the continuing growth in demand for child care services.

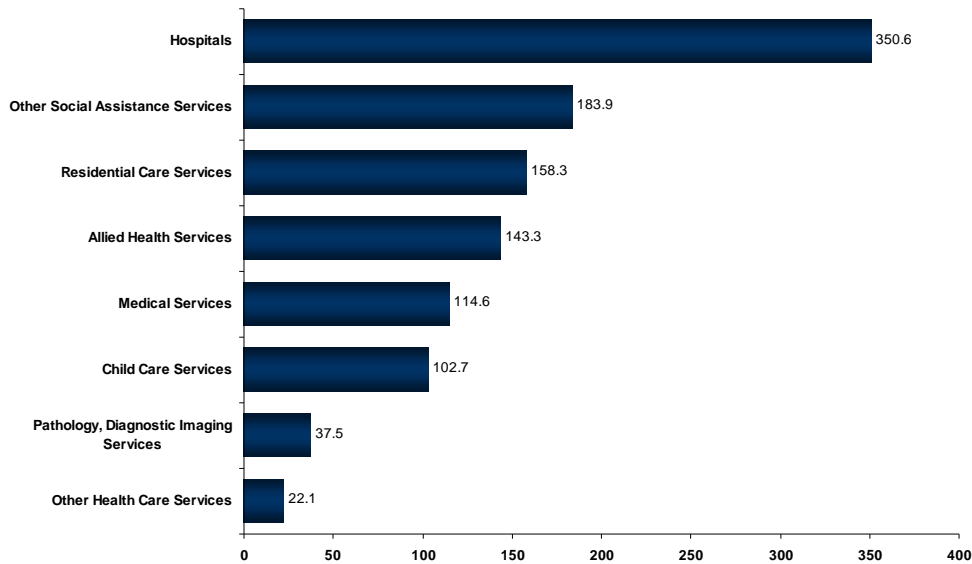
Figure 2: Employment Level (line RHS) and Annual Change ('000s) - year to February (cols LHS)



Source: ABS Labour Force Survey (DEEWR trend data)

When employment in the Health Care and Social Assistance industry is broken down into specific sectors, the main contributors to employment can be identified. The Hospitals sector dominates employment in the Health Care and Social Assistance industry, accounting for 350 600 people or 31.5 per cent of industry employment as at February 2009 (see Figure 3). The second largest source of employment was Other Social Assistance Services, employing 183 900 workers (or 16.5 per cent).

Figure 3: Health Care and Social Assistance Sectors - Employment Level ('000s) - February 2009



Source: ABS Labour Force Survey (DEEWR trend data)

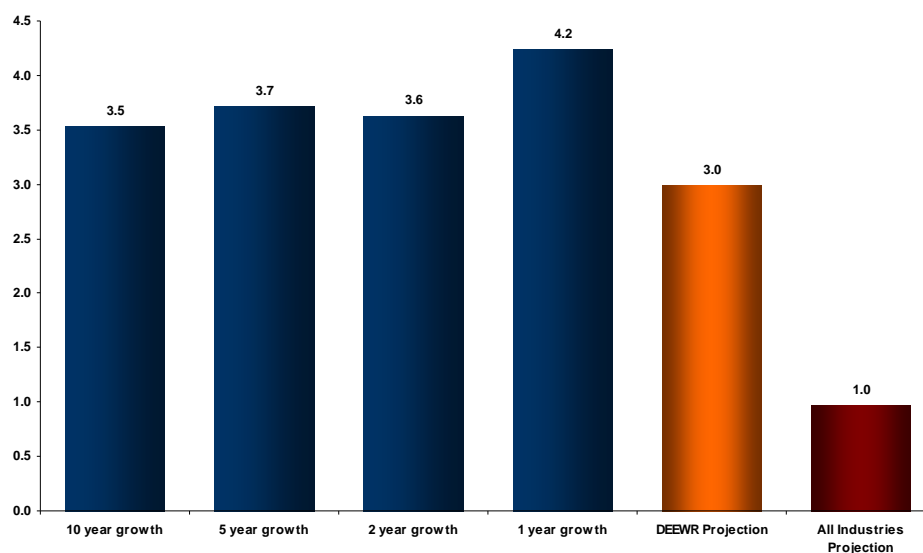
Employment Prospects

The Department of Education, Employment and Workplace Relations (DEEWR) prepares annual updates of employment projections for industries for the next five years. These are based in part on the Monash model developed by the Centre of Policy Studies at Monash University, but also take into account recent employment trends and prospective industry developments. It should be noted that a certain degree of risk is attached to these employment projections.

Employment growth in Health Care and Social Assistance is expected to be very strong. An ageing population, the continued demand for child care coupled with the growth of community and home-based services and advances in medical technology are expected to increase the future demand for health services.

DEEWR has projected employment in the Health Care and Social Assistance industry to grow at an average rate of 3.0 per cent per annum, which equates to around 181 600 new jobs in the five years to 2013-14 (see Figure 4). This compares with an average annual growth rate of 1.0 per cent for all industries over the same period.

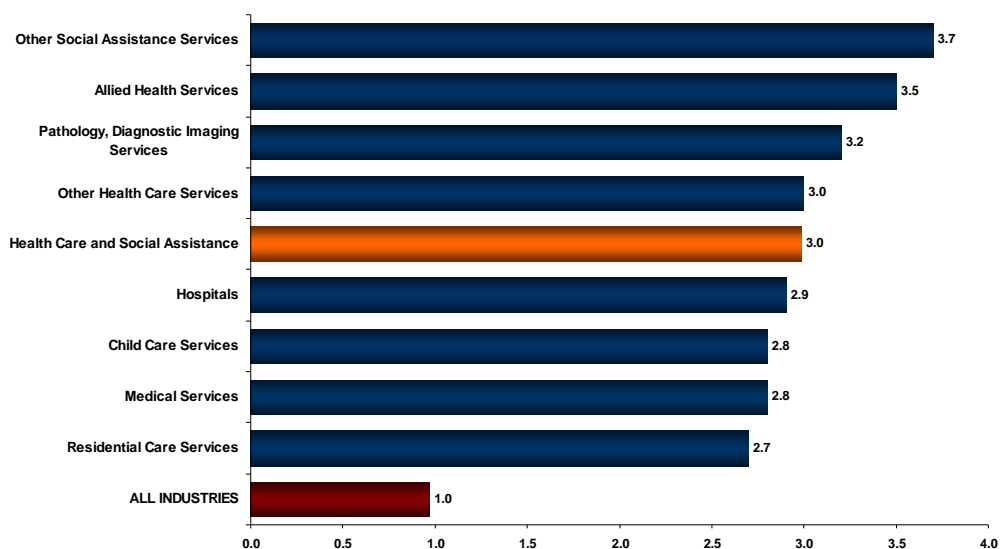
Figure 4: Recent and Projected Employment Growth (% pa) - to February 2009 (past) and 5 years to 2013-2014 (projected)



Source: ABS Labour Force Survey (DEEWR trend data); DEEWR projections

Employment growth is expected to vary across the eight specific Health Care and Social Assistance sectors (see Figure 5). Other Social Assistance Services is projected to experience the strongest employment growth within the industry (up by 3.7 per cent per annum). Allied Health Services (3.5 per cent per annum) and Pathology and Diagnostic Imaging Services (3.2 per cent per annum) are also expected to grow at a faster rate than the Health Care and Social Assistance industry as a whole. Residential Care Services is expected to be the industry sector with the weakest employment growth (2.7 per cent per annum).

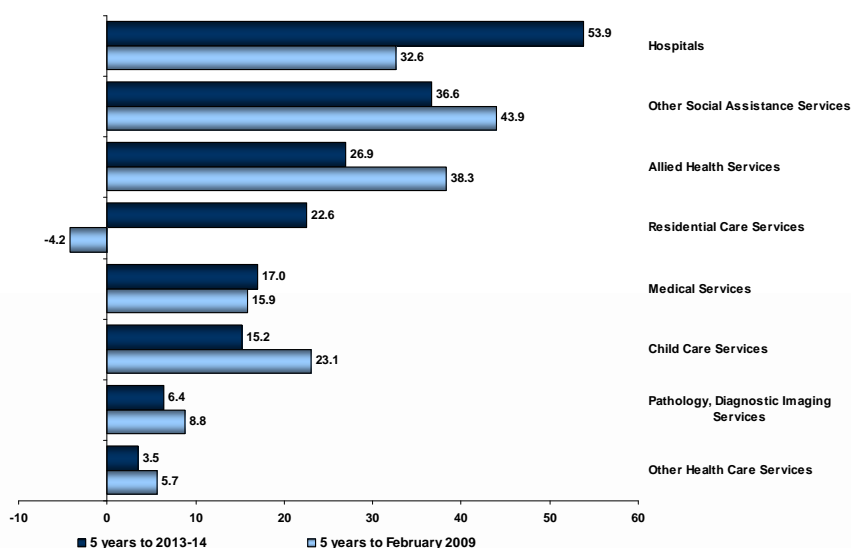
Figure 5: Health Care and Social Assistance Sectors - Projected Employment Growth (% pa) to 2013-2014



Source: DEEWR projections

In the five years to February 2009, Other Social Assistance Services experienced the largest employment gain (43 900 new jobs, see Figure 6), followed by Allied Health Services (38 300) and Hospitals (32 600). In the five years to 2013-14, the largest employment gains are projected for Hospitals (up by 53 900), followed by Other Social Assistance Services (36 600), Allied Health Services (26 900) and Residential Care Services (22 600).

Figure 6: Health Care and Social Assistance Sectors - Recent and Future Employment Growth ('000) 5 years to February 2009 (past) and to 2013-14 (projected)

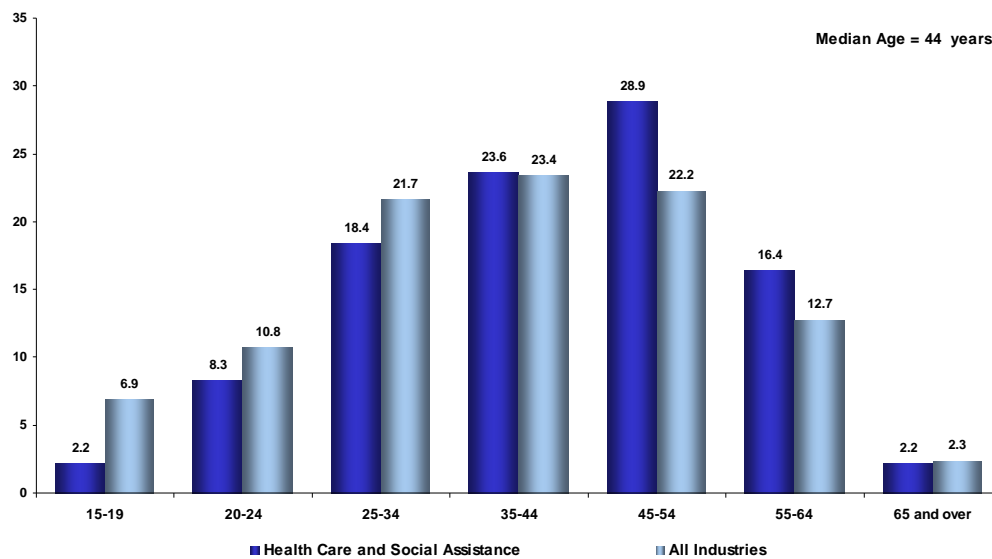


Source: ABS Labour Force Survey (DEEWR trend data); DEEWR projections

Workforce Ageing

Population Ageing is flowing through to workforce ageing, and this is evident in the Health Care and Social Assistance industry. Compared with other industries, the age profile of Health Care and Social Assistance is skewed towards workers aged 45 to 64 years (45.3 per cent compared with 34.9 per cent for all industries, see Figure 7). The share of workers aged between 15 and 34 years, by contrast, is below the average for all industries (28.9 per cent compared with 39.4 per cent for all industries). This age pattern reflects the high level of skill associated with many occupations in the Health Care and Social Assistance industry, and the delayed entry of many health professionals into the workforce. Workforce ageing is likely to exacerbate skill shortages that are already evident.

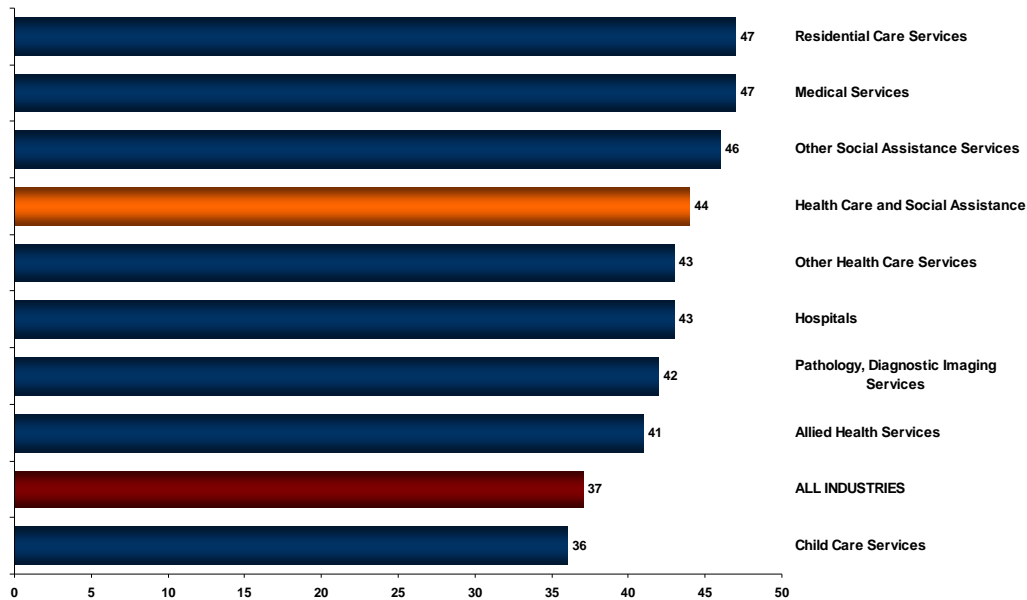
Figure 7: Employed Persons by Age Compared with All Industries (% share of employment) – 2008



Source: ABS Labour Force Survey

The Health Care and Social Assistance industry has a relatively older workforce, with a median age of 44 years in 2008. This compares with a median age of 37 years for all industries (see Figure 8). The median age of workers within the industry ranged from 47 years for Residential Care Services down to 36 years for Child Care Services.

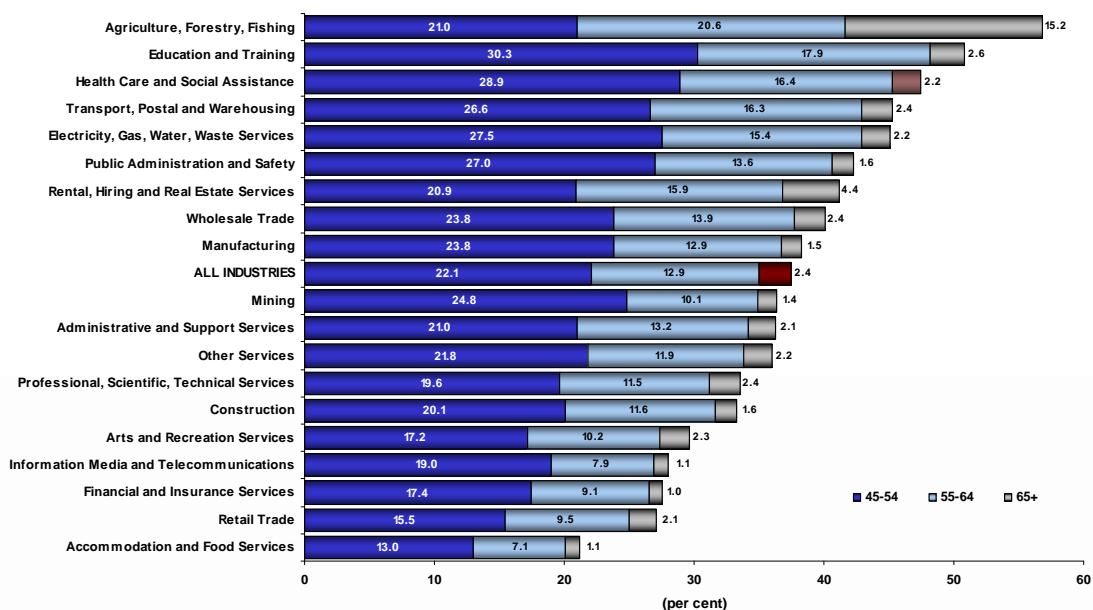
Figure 8: Health Care and Social Assistance Sectors - Median Age in years - 2008



Source: ABS Labour Force Survey

The Health Care and Social Assistance industry has a relatively high share of workers aged 45 years and over. In 2008, 47.5 per cent of workers in the industry were aged 45 years and over, compared with an average of 37.4 per cent for all industries (see Figure 9). Of all 19 ANZSIC industries, the industry had the second largest share of workers aged 45 to 54 years and the third largest share of workers aged 55 to 64 years.

Figure 9: Mature Age Workers (45+ years) - % share of employment -2008



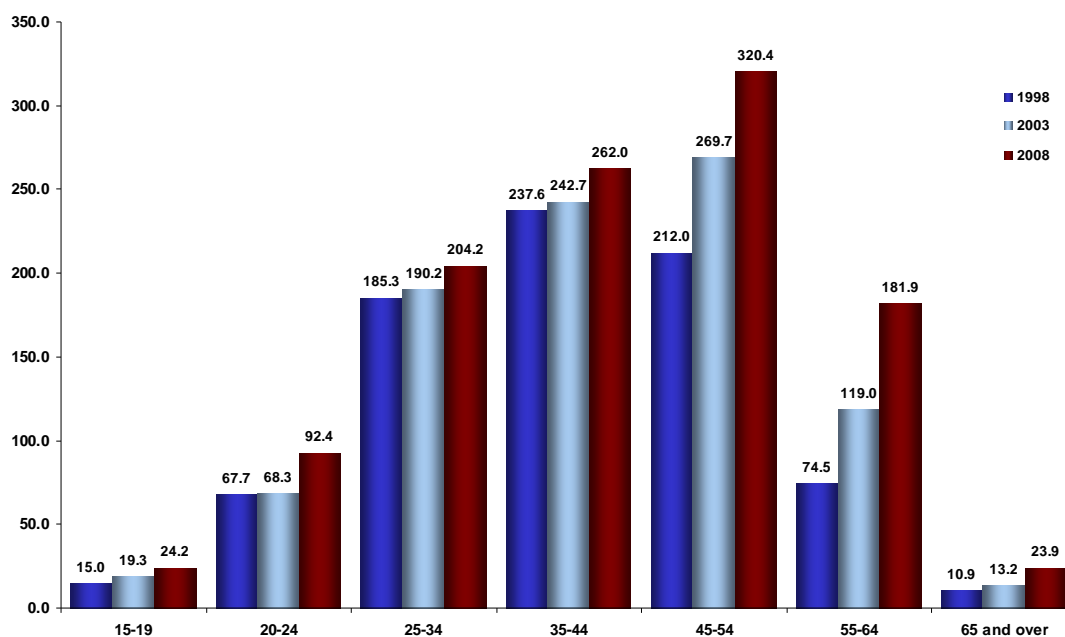
Source: ABS Labour Force Survey

Figure 10 shows employment by age group for three calendar years: 1998, 2003 and 2008. This provides a guide to changes in the employment mix by age group in the Health Care and Social Assistance industry.

As the Australian workforce experiences an increase in the median age of the population, it is important that there is a supply of prime age and mature age workers entering the workforce.

In response to the strong growth in employment in recent years, there has been an influx of new workers in the industry for all age groups over the past decade. However, increases in mature age employment have been the main driver of industry employment growth over the past decade, with workers aged between 45 to 54 years experiencing the strongest employment growth in the 10 years to 2008 (up by 108 400). This reflects existing workers taking their jobs with them as they move into mature age cohorts as well as new workers entering the industry. Over the same period, workers aged between 54 and 64 years (many of whom are approaching retirement) also experienced strong growth (107 400).

Figure 10: Employed persons by age ('000s) - 1998, 2003, 2008

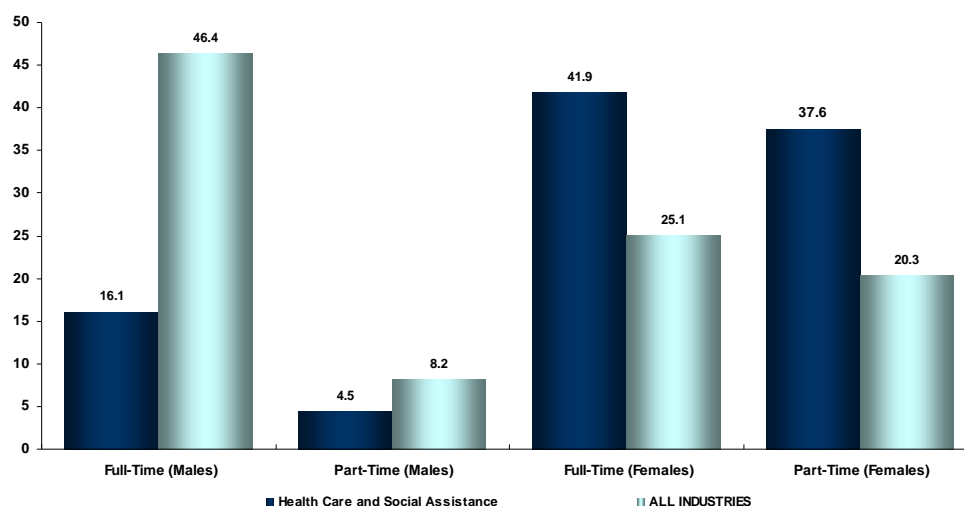


Source: ABS Labour Force Survey

Employment by Gender and Full-time/Part-time

Health Care and Social Assistance workers are predominantly female and a relatively large proportion work part-time (see Figure 11). In the year to February 2009, the female share of employment in the industry was 79.5 per cent which compares with an average of 45.4 per cent for all industries. This reflects a very high female share of employment for Child Care Services (95.6 per cent, see Figure 12). Further, more than two fifths (42.1 per cent) of the Health Care and Social Assistance workforce was employed on a part-time basis, compared with 28.5 per cent for all industries.

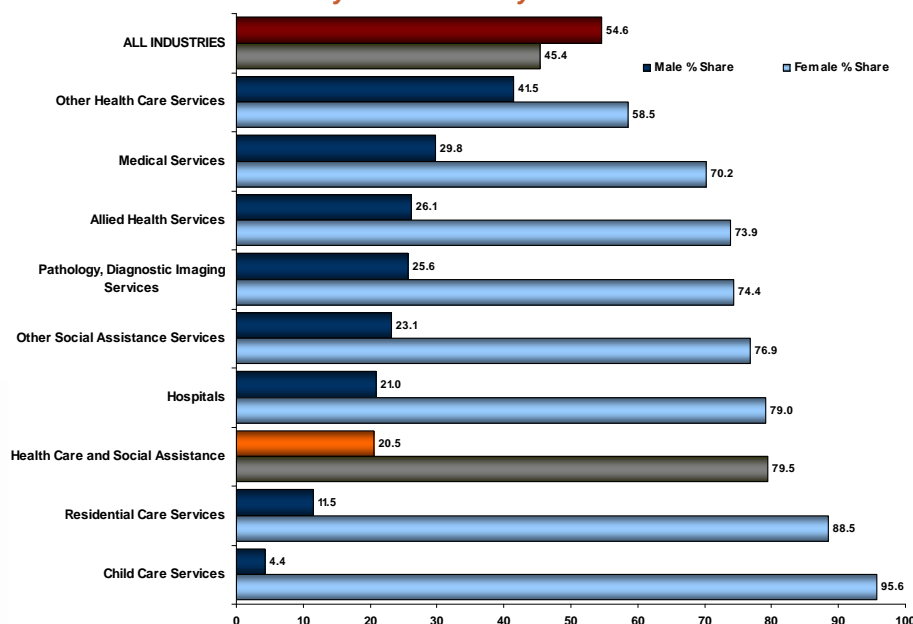
Figure 11: Employment by Gender and Full-time - Part-time (% share) - year to February 2009



Source: ABS Labour Force Survey

All of the Health Care and Social Assistance sectors are dominated by female employment. This was most apparent in Child Care Services (95.6 per cent) and Residential Care Services (88.5 per cent, see Figure 12). The sector with the highest share of male employment was Other Health Services (41.5 per cent) although this sector was also dominated by female workers (58.5 per cent).

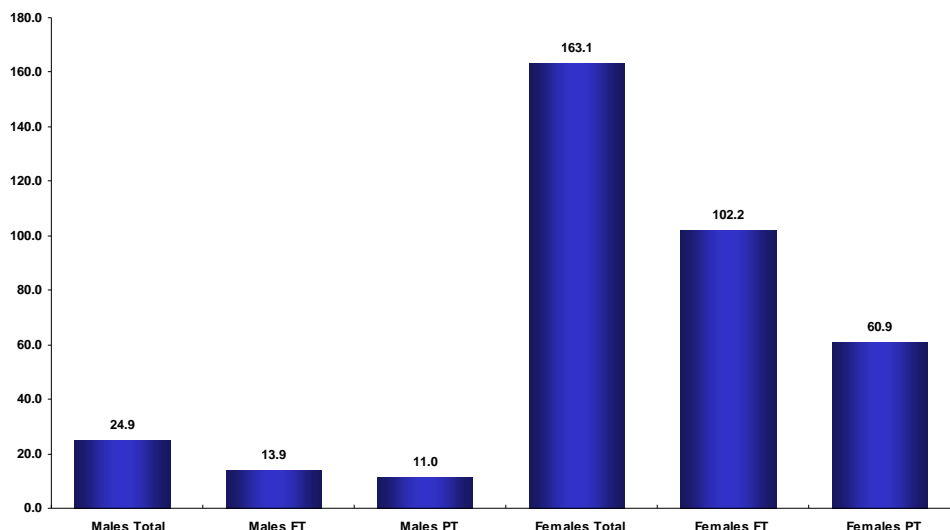
Figure 12: Health Care and Social Assistance Sectors - Employment by Gender (% share) year to February 2009



Source: ABS Labour Force Survey

In the five years to February 2009 (see Figure 13), employment growth for females in Health Care and Social Assistance was strong (up by 163 100). Over the same period, male workers also experienced employment gains (up by 24 900).

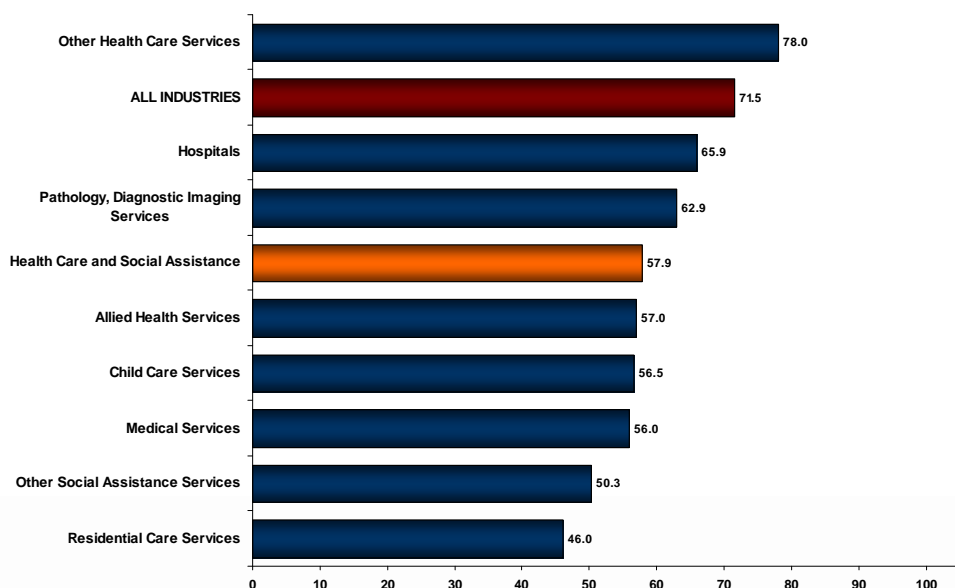
Figure 13: Employment Growth by Gender (5 years) Full-time / Part-time - year to February 2009 ('000s)



Source: ABS Labour Force Survey

All sectors within the Health Care and Social Assistance industry had lower shares of full-time employment than all industries (71.5 per cent, see Figure 14), with the exception of Other Health Care Services (78.0 per cent). The lowest full-time employment share was apparent in Residential Care Services (46.0 per cent), followed by Other Social Assistance Services (50.3 per cent).

Figure 14: Health Care and Social Assistance Sectors - % working full-time - year to February 2009

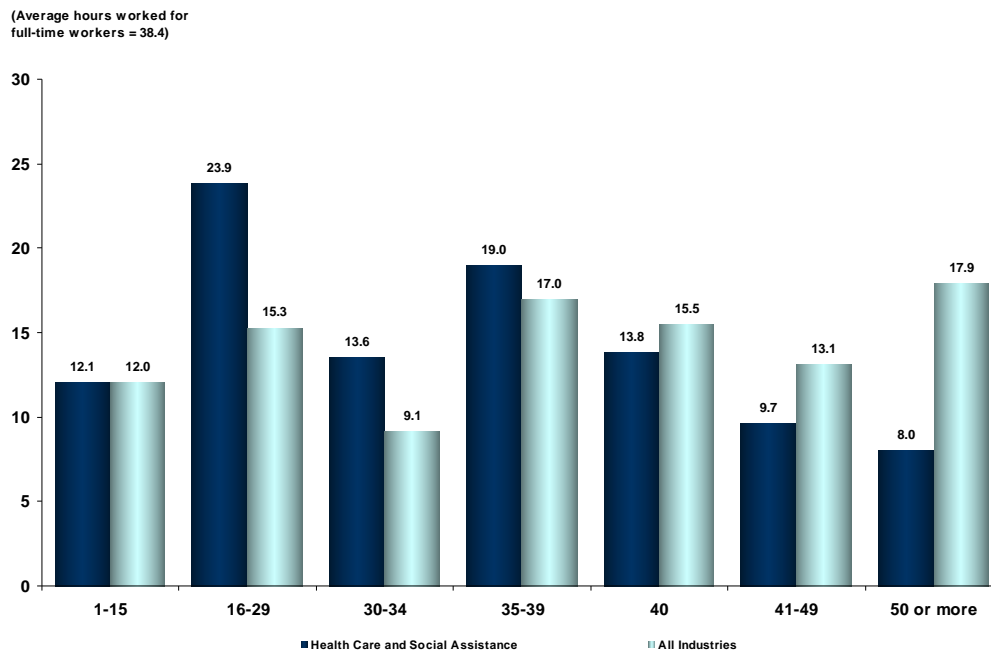


Source: ABS Labour Force Survey

Hours Worked

On average, full-time workers in Health Care and Social Assistance worked 38.4 hours per week in 2009, compared with 41.3 hours for workers in all industries (see Figure 15). The highest shares of workers in the industry were recorded in the 16 to 29 hours and 35 to 39 hours categories (23.9 per cent and 19.0 per cent respectively). Those working 40 hours or more were below the shares for all industries, especially in the 50 hours or more category (8.0 per cent compared with 17.9 per cent for all industries).

Figure 15: Hours of Work (% share) - year to February 2009



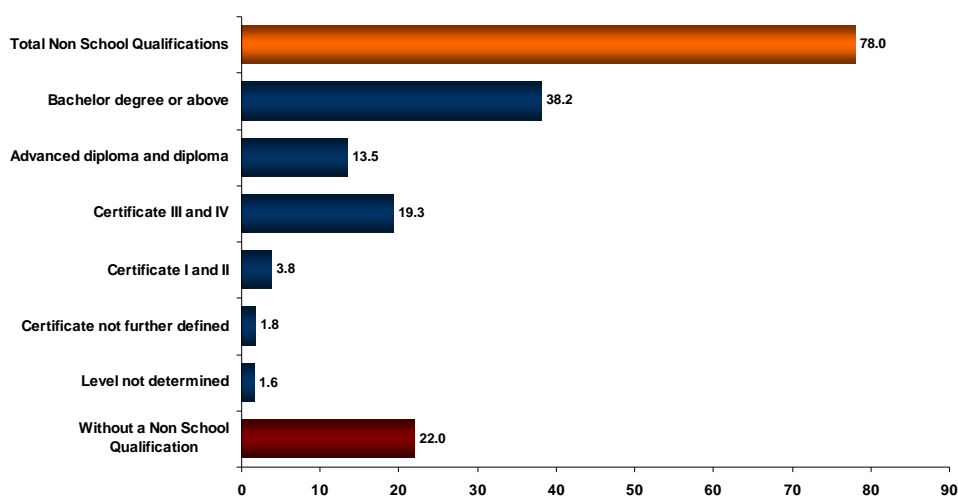
Source: ABS Labour Force Survey

Employment Characteristics

Educational Profile

In general, Health Care and Social Assistance workers are highly qualified, with more than three quarters (78.0 per cent) of workers having completed a non-school qualification as at May 2008 (see Figure 16). More than one third (38.2 per cent) of workers had obtained a Bachelor degree or above. However, about one in five (22.0 per cent) workers in the industry was without a non-school qualification, reflecting the diverse range of occupations on offer in the Health Care and Social Assistance industry, including for less-skilled workers.

Figure 16: Educational Attainment (% share of employment) - May 2008

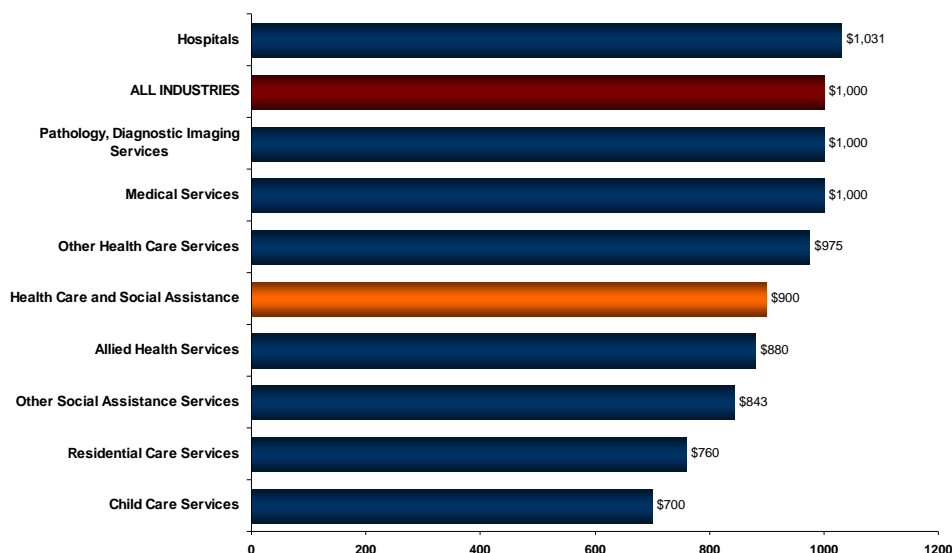


Source: ABS Education and Work, Cat. no. 6227.0

Median Weekly Earnings

In 2008, median weekly full-time earnings in the Health Care and Social Assistance industry was \$900, which was below the all industries average of \$1000 (see Figure 17). Earnings in the industry reflect the mix of higher paying professional occupations and support staff with lower earnings. Within the Health Care and Social Assistance industry, median weekly full-time earnings were highest in Hospitals (\$1031). The median weekly full-time earnings of Child Care Services workers (\$700) were lowest in the industry.

Figure 17: Health Care and Social Assistance Sectors - Median weekly earnings (full-time and before tax) - August 2008

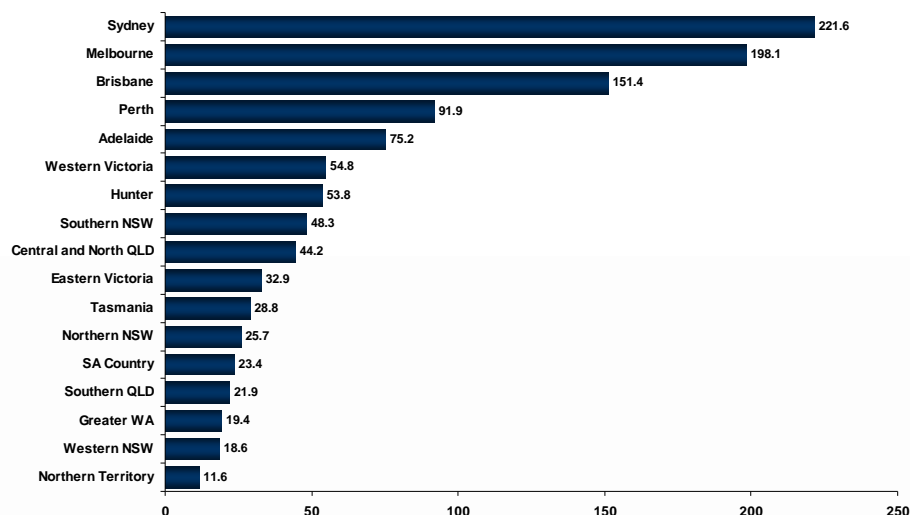


Source: ABS Employee Earnings, Benefits and Trade Union Membership, Cat. no. 6310.0

Employment by Region

Employment in the Health Care and Social Assistance industry is highly concentrated in the major capital cities in Australia, reflecting the large population base in these cities (see Figure 18). In February 2009 the majority of workers in the Health Care and Social Assistance industry were employed in Sydney (221 600) and Melbourne (198 100), followed by Brisbane (151 400), Perth (91 900) and Adelaide (75 200).

Figure 18: Main Employing Regions ('000s) – year to February 2009

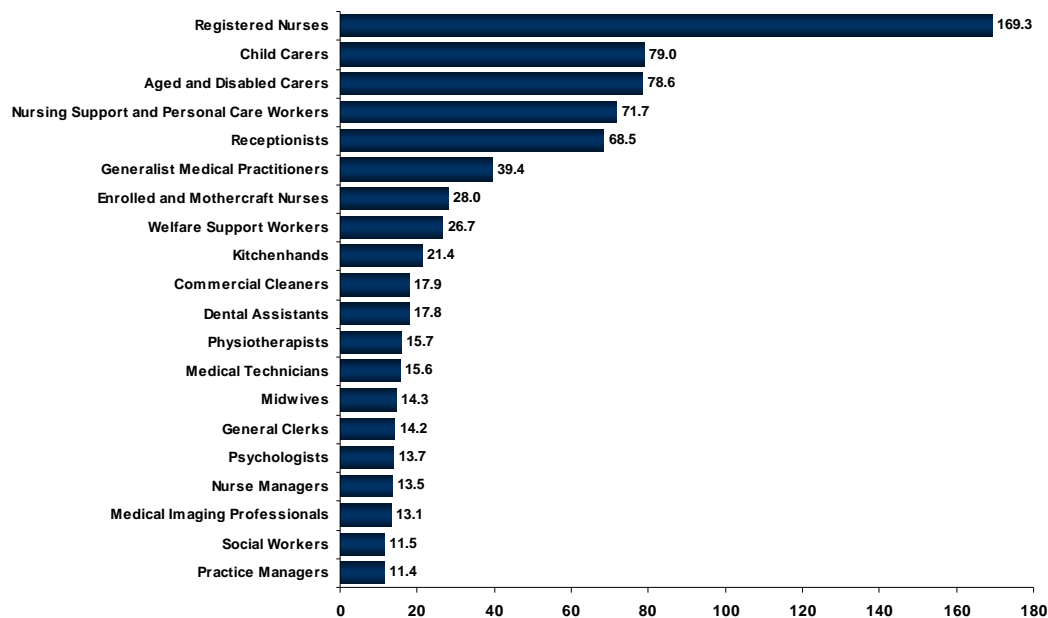


Source: ABS Labour Force Survey

Main Employing Occupations

In 2008, the largest employing occupations in the Health Care and Social Assistance industry were Registered Nurses (169 300), followed by Child Carers (79 000), Aged and Disabled Carers (78 600) and Nursing Support and Personal Care Workers (71 700, see Figure 19).

Figure 19: Top 20 Employing Occupations ('000) –2008



Source: ABS Labour Force Survey

Further information on occupations is available on the Job Outlook website (www.joboutlook.gov.au)

For further information on the Health Care and Social Assistance industry (or other industries), visit the SkillsInfo website at skillsinfo.gov.au. SkillsInfo provides a range of skills related information for industries and regions. The website offers a broad range of information on employment, careers, education and training and skills issues – including workforce ageing, skills in demand, labour force data, ICT and employability skills, as well as quick links to skills information. Data are sourced mainly from the ABS Labour Force Survey.

SkillsInfo also brings together a large collection of links to external industry and skills related websites.

