



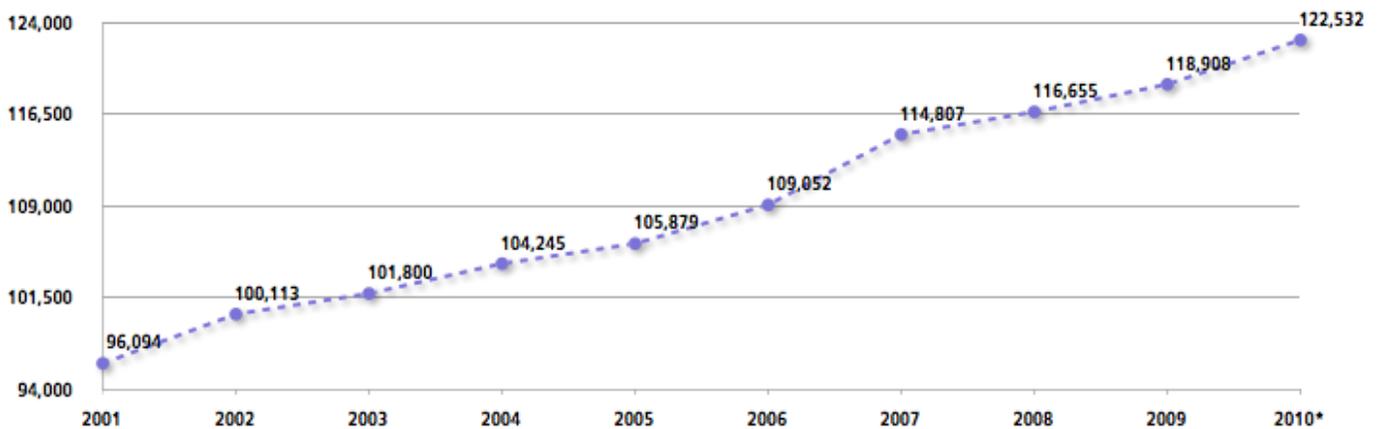
## Healthcare and Social Assistance Industry

Healthcare and social assistance is the largest industry in Boston, making up 18.7% of total employment in 2010. This ranks healthcare 1st amongst the 20 major industrial sectors identified by the Bureau of Labor Statistics (BLS)<sup>1</sup>. The healthcare industry includes business activities such as general medical and surgical hospitals, ambulatory health care services, community care facilities for the elderly, child day care services, and offices of physicians.

### Employment

Today, Boston's healthcare industry employs close to 122,000 people. Since 2001, the healthcare industry in Boston has increased by 27% and added nearly 6,000 jobs since 2008. Boston's healthcare sector has grown through both recessions without two consecutive years of declining payroll employment since at least 1972, when detailed records began. Healthcare's steady growth has been a national phenomenon, but elements of Boston's experience are unique because of the city's preeminence as an academic medical community. In addition to serving patients, Boston's hospitals teach tomorrow's doctors and conduct medical research. These research activities have helped make Boston the leading recipient of National Institutes of Health (NIH) research grants for 16 consecutive years<sup>2,3</sup>.

### Number of Healthcare and Social Assistance Jobs



Source: Massachusetts Department of Workforce Development, US Bureau of Economic Analysis, Boston Redevelopment Authority (BRA) Research Division Analysis.

\*2010 employment data is a preliminary estimate based on 2010 annual data from DWD and 2009 BEA data.

1 Industry sectors were selected according to their 2-digit North American Industry Classification System (NAICS) codes. LINK: <http://www.census.gov/eos/www/naics/>

2 For more detailed information, please see The Boston Economy in 2010, (BRA) Research Division. LINK: <http://www.bostonredevelopmentauthority.org/PDF/ResearchPublications/TheBostonEconomyin2010.pdf>

3 For more information see the BRA's Research Division report on NIH funding in Boston at: <http://bostonredevelopmentauthority.org/PDF/ResearchPublications/BostonNIHReport2009.pdf>

The largest occupations in the healthcare and social assistance industry in Boston include registered nurses, nursing aides, orderlies, attendants, and medical secretaries. Below is a list of the top ten healthcare occupations in Boston by employment. These ten occupations make up approximately 44% of the healthcare and social assistance industry.

### **Top Ten Healthcare and Social Assistance Occupations by Employment**

<b><u>Job Title:</u></b>	<b><u>Total</u></b>
Registered Nurses .....	18,266
Nursing Aides, Orderlies, and Attendants .....	9,958
Medical Secretaries .....	4,556
Home Health Aides .....	3,845
Licensed Practical and Licensed Vocational Nurses .....	3,653
Social and Human Service Assistants .....	3,165
Personal and Home Care Aides .....	2,522
Medical Assistants .....	2,396
Receptionists and Information Clerks .....	2,032
Office Clerks, General.....	1,884

Source: Labor Market Assessment Tool 2.0, (BRA) Research Division Analysis.

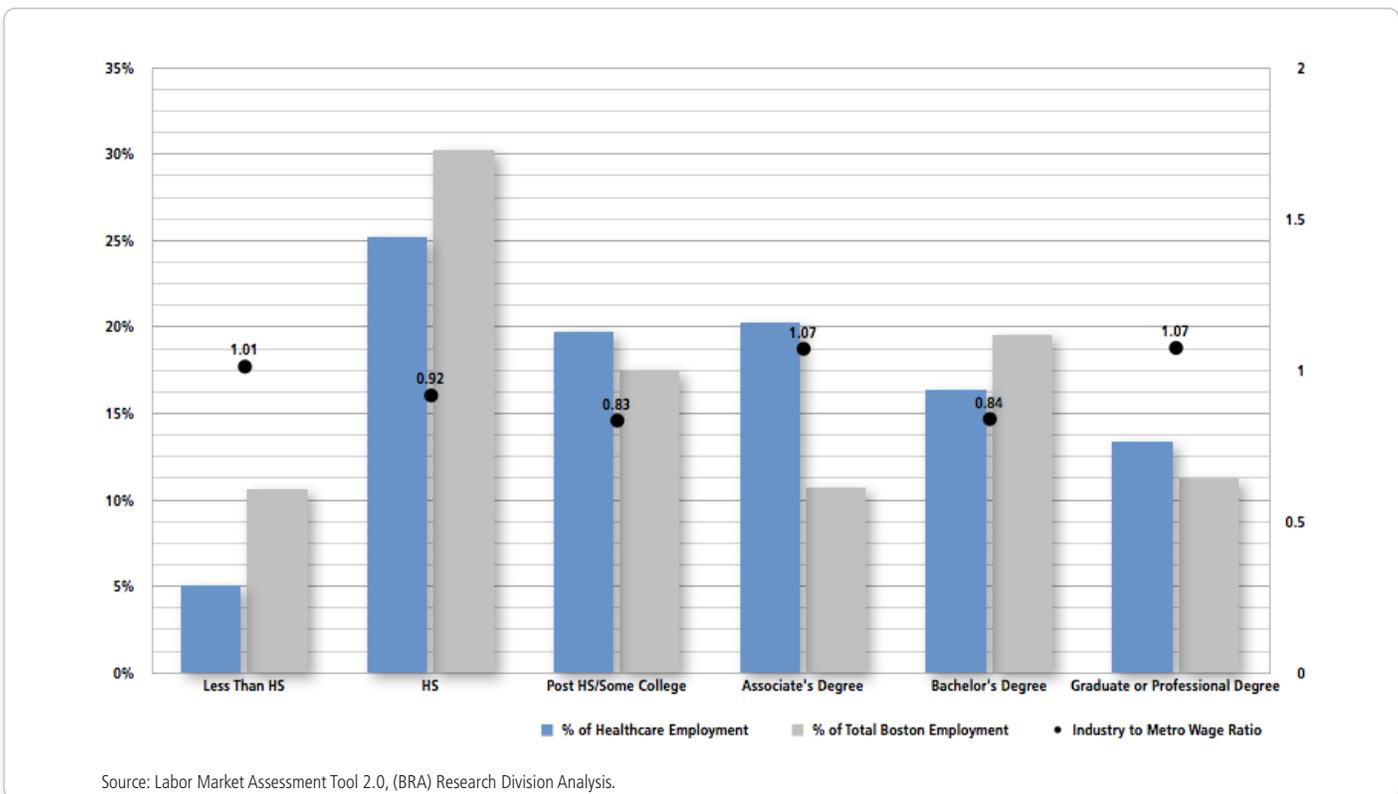
### **Major Employers in Healthcare and Social Assistance**

The city's largest employers in the healthcare and social assistance industry include the Massachusetts General Hospital, Brigham and Women's, Children's Hospital, Beth Israel Deaconess Medical Center, and Boston Medical Center. Healthcare establishments are scattered across the city, in particular their concentrations are in the West End, downtown, the South End, and the Longwood Medical Area. The attached map depicts the healthcare and social assistance establishments by size in Boston.

### Education, Skill Requirements, and Wages

Overall, the educational requirements for the healthcare and social assistance industry are diverse. Close to 50% of jobs in this industry require an associate’s degree or more. This is higher than Boston as a whole, where approximately 42% of jobs require an associate’s degree or more. The Industry-to-Metro wage ratio shows how wages by educational requirement look different between an industry and the Metro Boston average for the same education level. In general, the average wages for jobs in healthcare and social assistance vary from all jobs in the region by educational requirement.

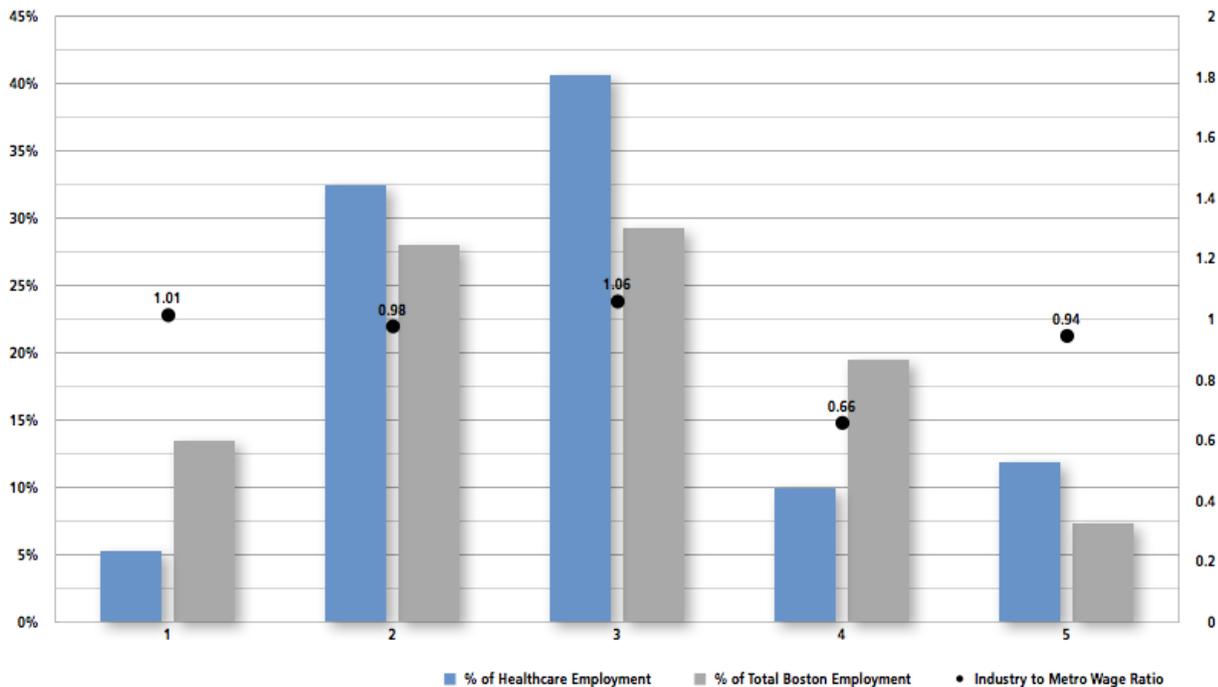
### Education Requirements and Wages



The Boston Redevelopment Authority’s Labor Market Assessment Tool (LMAT)<sup>4</sup> also has different measures for job training, called job zones. The lower the job zone number, the less training, education, and previous work experience needed to perform the job. Overall, close to 83% of jobs in the healthcare and social assistance are in job zones 2, 3, and 4. This indicates the industry overall requires an array of skills with preparation ranging from related on-the-job experience to 4-year bachelor degrees or higher

4. For more detailed information on LMAT, please see Introducing the Labor Market Assessment Tool-Boston Redevelopment Authority Research Division-publication 613.  
 LINK: <http://www.bostonredevelopmentauthority.org/PDF/ResearchPublications/LMAT%20Introduction.pdf>

## Job Zones and Wages

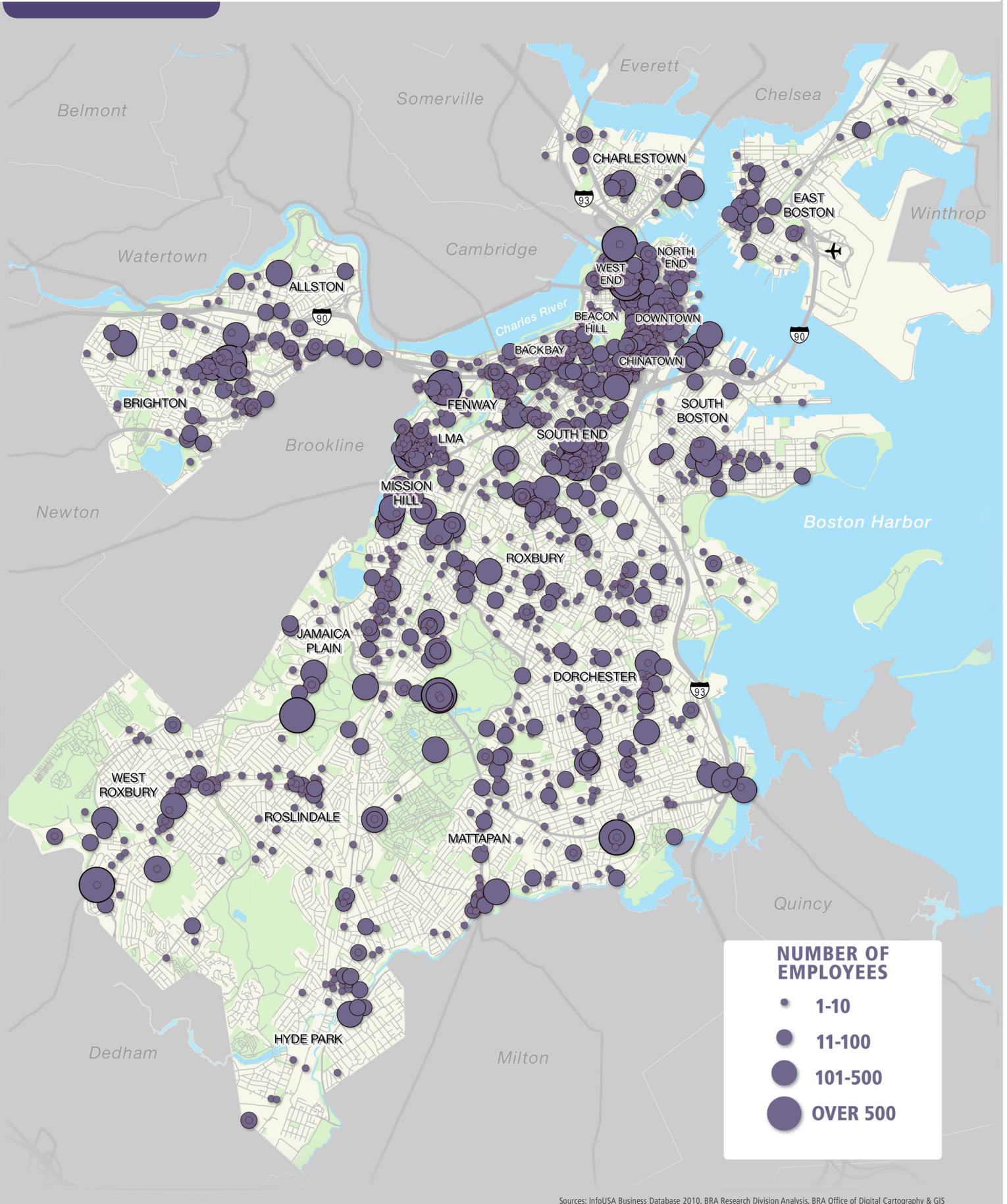


Source: Labor Market Assessment Tool 2.0, (BRA) Research Division Analysis.

## Sector Trends

A location quotient (LQ) is used to assess the degree of regional specialization in an industry as compared to the national average. An LQ of “1” indicates that an industry is concentrated in a region’s economy in a proportion similar to the US overall. An LQ over “1” indicates that the industry is an area of concentration for the region. With a location quotient of 1.67, the healthcare and social assistance industry accounts for a greater proportion of total jobs in Boston than at the national level.

In the coming years, employment in the healthcare and social assistance industry in Boston is expected to increase substantially. Using New England Economic Partnership (NEEP) projections, we estimate the healthcare and social assistance industry to grow by approximately 10.7 %—or 13,123 jobs—by 2015<sup>5</sup>. This change would account for 29.4% of the city’s total employment change during the 5-year period.



Sources: InfoUSA Business Database 2010, BRA Research Division Analysis, BRA Office of Digital Cartography & GIS

## City of Boston - Industry Profiles

<b>Rank Industry:</b>	<b># OF EMPLOYEES</b>	<b>CHANGE IN JOBS 2001-2010</b>	<b>% OF TOTAL EMPLOYMENT</b>	<b>LOCATION QUOTIENT</b>	<b>AVERAGE WAGES</b>	<b>JOBS ADDED BY 2015</b>
1. Health Care and Social Assistance Industry	122,532	26,390	18.5%	1.67	\$67,333	13,117
2. Public Administration	78,354	(11,619)	11.8%	0.84	\$66,111	2,911
<i>State Government</i>	39,185	12,474	5.9%	1.95	-	1,456
<i>Local Government</i>	22,983	(19,428)	3.5%	0.42	-	854
<i>Federal Government</i>	16,184	1,354	2.4%	1.48	-	601
3. Finance and Insurance Industry	78,407	(5,993)	11.8%	2.28	\$170,624	1,695
4. Professional, Scientific and Technical Services Industry	73,897	1,692	11.2%	1.62	\$108,504	7,550
5. Educational Services Industry	50,247	6,585	7.6%	3.28	\$64,627	5,376
6. Accommodation and Food Services Industry	49,577	6,143	7.5%	1.06	\$25,956	4,622
7. Administrative and Support and Waste Management Remediation Services Industry	32,124	(7,675)	4.9%	1.01	\$46,005	3,286
8. Retail Trade Industry	30,477	(360)	4.6%	0.45	\$30,664	655
9. Other Services (except Public Administration)	29,279	2,967	4.4%	0.89	\$37,933	1,264
10. Real Estate and Rental and Leasing Industry	21,382	2,227	3.2%	0.75	\$80,999	465
11. Transportation and Warehousing Industry	18,537	(5,893)	2.8%	0.88	\$49,115	(426)
12. Information Industry	16,407	(5,844)	2.5%	1.28	\$88,463	1,583
13. Arts, Entertainment, and Recreation Industry	14,712	2,452	2.2%	1.00	\$79,502	1,383
14. Construction Industry	13,864	(5,794)	2.1%	0.41	\$90,825	28
15. Manufacturing Industry	9,545	(8,596)	1.4%	0.20	\$73,448	175
16. Wholesale Trade Industry	9,256	(1,672)	1.4%	0.41	\$79,231	283
17. Management of Companies and Enterprises	6,243	(4,022)	0.9%	0.86	\$122,906	643
18. Utilities Industry	2,441	(249)	0.4%	-	\$102,170	63
19. Agriculture, Forestry, Fishing and Hunting and Mining	180	(1)	0.0%	-	\$51,720	26
<b>Total</b>	<b>657,461</b>	<b>(9,262)</b>	<b>99.3%</b>	<b>-</b>	<b>\$78,375</b>	<b>47,610</b>

- Projections for 2010-2015 are based upon the New England Economic Partnership (NEEP) May 2011 forecast.
- 2010 employment data is a preliminary estimate based on 2010 annual data from DWD and 2009 BEA data.
- Because of low employment, Agriculture and Mining were combined for this table.

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