

Town of Neepawa

*Health Care and Social Assistance Sector Profile
November 2018*



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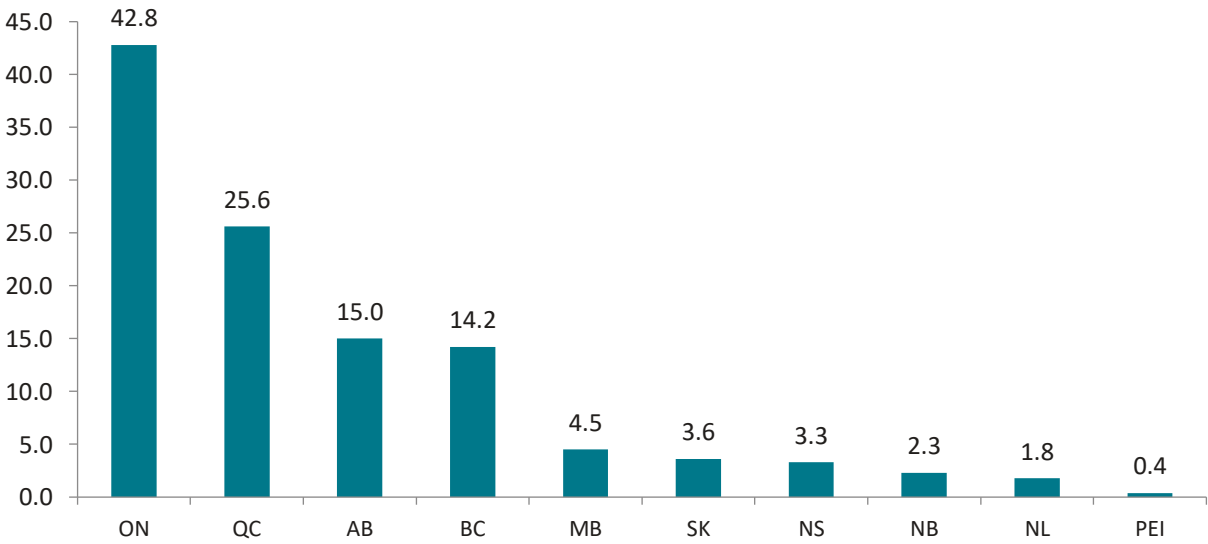
1. Sector Overview

The Health Care and Social Assistance sector comprises establishments providing health care and social assistance for individuals. The sector includes both health care and social assistance because it is sometimes difficult to distinguish between the boundaries of these two activities. The industries in this sector are arranged on a continuum starting with those establishments providing medical care exclusively, continuing with those providing health care and social assistance, and finally finishing with those providing only social assistance. The services provided by establishments in this sector are delivered by trained professionals. All industries in the sector share this commonality of process, namely, labor inputs of health practitioners or social workers with the requisite expertise. Many of the industries in the sector are defined based on the educational degree held by the practitioners included in the industry¹. Under Statistics Canada and the North American Industry Coding System (NAICS) this consists of 4 different sub-sectors.

1.1 Sector Size & Performance

Canada’s Health Care and Social Assistance sector contributed \$114.5 billion to Canada’s overall GDP in 2017. According to Statistics Canada, Manitoba is the fifth largest output contributor to total health care GDP in Canada, with a contribution of more than \$4.5 billion in 2017.

Figure 1: Gross Domestic Product for Health Care and Social Assistance Sector by Province 2017 (\$CAD Billions)



Source: Statistics Canada GDP by NAICS at Basic Prices, Table 36-10-0402-01, 2018

¹ NAICS Sector 62: Health Care and Social Assistance
Source: classcodes.com/lookup/sector-62/



The Health care and social assistance sector saw continued growth in output from 2013 through 2017, which due to the essential nature of the sector and the continuing aging of Canada’s population.

Table 1: Health care and social assistance Sector GDP Output and Year-Over-Year Growth for Manitoba (Millions CAD)

	2013	2014	2015	2016	2017
Health care and social assistance GDP	4,265.0	4,290.2	4,365.5	4,438.0	4,538.0
Y-O-Y Growth (%)		0.6%	1.8%	1.7%	2.3%

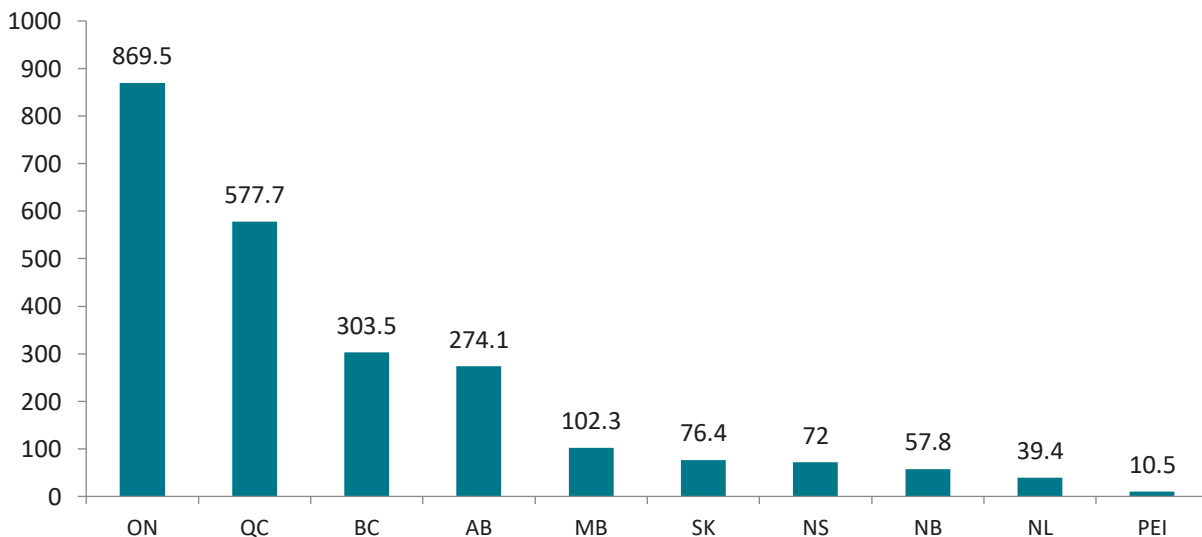
Source: Statistics Canada GDP by NAICS at Basic Prices, Table 36-10-0402-01, 2018

1.2 Workforce & Employment

1.2.1 Employment Data & Projections

The Province of Manitoba has the fifth largest number of employees in Health Care and Social Assistance sector, employing approximately 4% of the total Health Care and Social Assistance sector workforce in Canada. In terms of overall employment, approximately 16% of Manitoba’s employed workforce is in Health Care and Social Assistance – the 2nd largest percentage of all provinces. Newfoundland and Labrador employ 18% of their workforce in Health Care and Social Assistance – the highest percentage of all the provinces – followed by Manitoba (16%) Nova Scotia (16%) and New Brunswick (16%).

Figure 2: Employed Labour Force in Health Care and Social Assistance Sector, Provinces, 2017 (Thousands, Number of People)



Source: Statistics Canada, Census, 2016



As of 2017, approximately 416 residents of Neepawa are employed in the Health Care and Social Assistance sector. The most common Health Care and Social Assistance sub-sectors for Neepawa residents are Nursing and residential care facilities (144 workers, 35%) Ambulatory health care services (109 workers, 26%), and Social assistance (89, 21%). See Table 2 for a detailed breakdown.

Table 2: Employed Labour Force in Health Care and Social Assistance Sector, Communities, 2017 (Number of People)

NAICS	Description	Neepawa	Division 15	Manitoba
621	Ambulatory health care services	109	442	27,704
622	Hospitals	75	228	26,687
623	Nursing and residential care facilities	144	744	26,158
624	Social assistance	89	478	20,205
	Total	416	1,892	100,754

Source: Employees & Self-Employed - Emsi 2018.1

From 2007-2017 Neepawa gained 93 Health Care and Social Assistance jobs, 14% of Division 15's 680 or 36% job gain. Both regions have had significant positive growth in line with the Province of Manitoba which gained 19,279 jobs or 19%. This indicates Neepawa has had significant growth in the sector in line with both Division 15 and Manitoba.

Table 3: Change in Employed Labour Force in Health Care and Social Assistance Sector, Communities, 2007-2017 (Number of Jobs)

Industry (NAICS)	Description	Neepawa	Division No. 15	Manitoba
621	Ambulatory health care services	66	259	2,809
622	Hospitals	-1	-49	2,627
623	Nursing and residential care facilities	-10	221	9,348
624	Social assistance	39	249	4,495
	Total	93	680	19,279

Source: Employees & Self-Employed - Emsi 2018.1

See Definition of Census Division 15 in Appendix



Table 4 showcases the location quotients (LQ)³ for Neepawa in 2017. The LQs measure the concentration of Health Care and Social Assistance employment in Neepawa, Manitoba Division 15 and Manitoba compared to the national rate.

When compared to Canada and Province of Manitoba, Division 15 and Neepawa have a high concentration of their labour force working in Nursing and residential care facilities.

On average, Neepawa has an average concentration of its employed labour force working in Health Care and Social Assistance when compared to Canada as a whole.

Table 4: Health Care and Social Assistance National Workforce Location Quotients – Neepawa, Division 15 & Manitoba

Industry (NAICS)	Description	Neepawa	Division No. 15	Manitoba
621	Ambulatory health care services	0.93	1.09	1.07
622	Hospitals	0.70	0.63	1.14
623	Nursing and residential care facilities	2.03	3.06	1.68
624	Social assistance	1.23	1.94	1.28
	Total	1.13	1.15	0.97

Source: Employees & Self-Employed - Emsi 2018.1

Table 5 showcases the location quotients (LQ)⁴ for Neepawa in 2018. The LQs measure the concentration of Health Care and Social Assistance employment in Neepawa compared to Division 15 and Manitoba.

When compared to Division 15, Neepawa has a high concentration of their labour force working in Hospitals. When compared to Manitoba, Neepawa has a high concentration of their labour force working in Nursing and residential care facilities.

Table 5: Health Care and Social Assistance Local Workforce Location Quotients – Neepawa, Division 15 & Manitoba

Industry (NAICS)	Description	Neepawa / Division 15		Neepawa/ Manitoba	
		LQ	Classification	LQ	Classification
621	Ambulatory health care services	0.85	Average	0.85	Average
622	Hospitals	1.10	Average	0.61	Low
623	Nursing and residential care facilities	0.65	Low	1.19	Average
624	Social assistance	0.62	Low	0.95	Average

Source: Employees & Self-Employed - Emsi 2018.1

³ An LQ of 1.25 and over suggests a high concentration of local activity in an industry and a LQ of less than 0.75 suggests a low concentration of local activity or gap area, in relation to the area being compared against. From a labour force perspective, LQs may offer insight into where local concentrations of industry-relevant skills may exist.

⁴ An LQ of 1.25 and over suggests a high concentration of local activity in an industry and a LQ of less than 0.75 suggests a low concentration of local activity or gap area, in relation to the area being compared against. From a labour force perspective, LQs may offer insight into where local concentrations of industry-relevant skills may exist.



1.2.2 Occupational Data

The top occupations in Neepawa’s Health Care and Social Assistance sector in 2017 included Early childhood educators and assistants, Nurse aides, orderlies and patient service associates and Registered nurses and registered psychiatric nurses (Table 6).

Table 6: Neepawa Employment in Health Care and Social Assistance by Top Occupations, 2017

NOC	Description	Neepawa	Division No. 15	Manitoba
4214	Early childhood educators and assistants	84	245	8,709
3413	Nurse aides, orderlies and patient service associates	57	281	18,539
3012	Registered nurses and registered psychiatric nurses	43	170	13,256
3112	General practitioners and family physicians	21	66	2,039
4212	Social and community service workers	20	163	5,901

Source: Employees & Self-Employed - Emsi 2018.

Table 7 highlights the top growing Health Care and Social Assistance occupations from 2007-2017. The vast majority of growth was in Early childhood educators and assistants and General practitioners and family physicians.

Table 7: Neepawa Employment in Health Care and Social Assistance by Top Occupations Change, 2007-2017

NOC	Description	Neepawa	Division No. 15	Manitoba
4214	Early childhood educators and assistants	50	116	2,294
3112	General practitioners and family physicians	18	55	100
3234	Paramedical occupations	10	45	357
1414	Receptionists	10	32	52
1241	Administrative assistants	8	30	659

Source: Employees & Self-Employed - Emsi 2018.1



1.2.3 Wages/Salary Data

Workers in the top Health Care and Social Assistance occupations within the Southwest Region which includes Neepawa, typically make a median hourly wage between \$15.00 and \$29.73 (depending on the position)⁵. The average Health Care and Social Assistance median wage in the Southwest Region is \$19.17, which is slightly higher than the Manitoba average (\$18.73) and slightly lower than the Canadian average (\$19.85).

Below are the most current wage estimates for Health Care and Social Assistance professionals in the Southwest Region, Manitoba, and Canada using the Government of Canada’s Wage Report.

Table 8: Median Hourly Wages for Health Care and Social Assistance Occupations 2018

NOC	Description	Southwest Region	Manitoba	Canada
4214	Early childhood educators and assistants	\$16.00	\$15.00	\$18.00
3413	Nurse aides, orderlies and patient service associates	\$17.55	\$18.65	\$19.92
3012	Registered nurses and registered psychiatric nurses	\$36.55	\$39.00	\$36.00
3112	General practitioners and family physicians	\$118,682/year	\$118,682/year	\$125,002/year
4212	Social and community service workers	\$17.31	\$21.00	\$21.00

Source: Economic and Social Development Canada, Wage Report, Sept 2017

1.2.4 Education and Training

Neepawa has approximately 230 people (5% of the town’s total population) educated Health Care and Social Assistance related fields. Combined, Neepawa and Division 15 have 2% of the people educated in Health Care and Social Assistance related skills in the province.

Table 9: Major Field of Study (Number of People, 2016)

Major Field of Study	Neepawa	Division 15	Manitoba	Neepawa + Division 15/ Manitoba %
Parks; recreation; leisure and fitness studies	10	55	3,310	2%
Health professions and related programs	215	1,035	64,870	2%
Dental; medical and veterinary residency programs	0*	0	1430	0%
Precision Production	10	135	7,655	2%
Health and related fields	230	1,095	69,600	2%

Source: Statistics Canada, Table 98-400-X2016285, 2016

*Data note, The Town of Neepawa reports 1 to 3 participants a month in the medical residency program.

⁵ Outliers have been removed.



The top 2 Health Care and Social Assistance occupations in Neepawa all have a good projected outlook from Economic and Social Development Canada and, for the most part, are skilled jobs requiring secondary school education. This indicates these occupations will continue to be in demand and require high levels of education. The third highest occupation in the sector, Registered nurses and registered psychiatric nurses, requires more education and has a shortage outlook in the region indicating it is in high demand.

Table 10: Outlook and Skills Requirements in Neepawa

NOC	Description	Outlook	Educational Requirements
4214	Early childhood educators and assistants	Good	<p>Early childhood educators Completion of a two- to four-year college program in early childhood education or A bachelor's degree in child development is required. Licensing by a provincial or territorial association for early childhood educators (ECE) is usually required.</p> <p>Early childhood educator assistants Completion of secondary school is required. Experience in child care is required. Completion of an early childhood education assistant certificate program or post-secondary courses in early childhood education may be required. Licensing by a provincial or territorial association for early childhood educators (ECE) may be required.</p>
3413	Nurse aides, orderlies and patient service associates	Good	<p>Some secondary school education and on-the-job training or A nursing aide or health care aide college or private institutional program, or a college nursing orderly program and supervised practical training are required. Some health care facilities may also require completion of specialized courses such as CPR (cardiopulmonary resuscitation), first aid and food handling/sterile processing. An appropriate class of driver's licence may be required for medical attendants</p>
3012	Registered nurses and registered psychiatric nurses	Shortage	<p>Registered nurses Completion of a university, college or other approved registered nursing program is required. Additional academic training or experience is required to specialize in a specific area of nursing. A master's or doctoral degree in nursing is usually required for clinical nurse specialists, clinical nurses, nursing consultants and nursing researchers. Registration with a regulatory body is required in all provinces and territories.</p> <p>Registered psychiatric nurses Completion of a university or college registered psychiatric nursing program is required. Registration with a regulatory body is required in Manitoba, Saskatchewan, Alberta, British Columbia and the Yukon.</p>



NOC	Description	Outlook	Educational Requirements
3112	General practitioners and family physicians	Good	<p>A bachelor's degree or In Quebec, completion of a college program and one year of pre-medicine university studies is usually required.</p> <p>Graduation from an approved medical school and Two to three years of family medicine residency training are required.</p> <p>Completion of the qualifying examinations of the Medical Council of Canada and Licensing by the provincial or territorial licensing authority are required.</p>
4212	Social and community service workers	Good	<p>Completion of a college or university program in social work, child and youth care, psychology or other social science or health-related discipline is usually required.</p> <p>Previous work experience in a social service environment as a volunteer or in a support capacity may replace formal education requirements for some occupations in this unit group.</p> <p>Social service workers may be required to be a member of a provincial regulatory body in some provinces.</p>

Source: Economic and Social Development Canada, Labour Market Information, Sept 2017



1.3 Local Industry

1.3.1 Business Establishment Counts

According to the Canadian Business Counts, there were 28 Health Care and Social Assistance businesses registered in Neepawa as of December 2017. Business counts are derived from GST registered businesses that earn over \$30,000 and are organized by number of employees.

Approximately 46% of businesses in the town's Health Care and Social Assistance sector are sole-proprietors (without employees), 18% of businesses employ 1-4 people, 21% employ 10-19 people and two businesses employ 100-199 people (Neepawa Health Centre).

The majority of firms are found within the sub-sectors of Community food and housing, and emergency and other relief services (11 businesses) and Offices of other health practitioners (8 businesses). While the two largest employers are in Other ambulatory health care services and General medical and surgical hospitals.

Table 11: Health Care and Social Assistance Sector Business Establishments Count in Neepawa

Industry (NAICS)	Without Employees	With Employees	1-4	5-9	10-19	100-199
6212 Offices of dentists	0	3*	0	0	0	0
6213 Offices of other health practitioners	6	2	1	1	0	0
6214 Out-patient care centres	2	1	1	0	0	0
6219 Other ambulatory health care services	0	1	0	0	0	1
6221 General medical and surgical hospitals	0	1	0	0	0	1
6232 Residential developmental handicap, mental health and substance abuse facilities	0	1	1	0	0	0
6233 Community care facilities for the elderly	0	0	0	0	0	0
6239 Other residential care facilities	0	3	1	0	2	0
6242 Community food and housing, and emergency and other relief services	5	6	1	1	4	0
Total	13	15	5	2	6	2

Source: Statistics Canada, Canadian Business Patterns Survey, December 2017. Adapted by MDB Insight Inc.

*Data note, The Town of Neepawa reports two dentists and one denturist in the community.



1.3.2 Business Establishment Location Quotients

Table 12 showcases the location quotients for Neepawa in 2016. The LQs measure the concentration of Health Care and Social Assistance businesses in Neepawa relative to the Division 15 and Manitoba.

When compared to Division 15 and Manitoba, Neepawa has a high concentration of businesses that are in Community food and housing, and emergency and other relief services, Other residential care facilities and Out-patient care centres.

On average, Neepawa has a high concentration of its businesses working in Health Care and Social Assistance compared to Division 15 and the province as a whole.

Table 12: Health Care and Social Assistance Business Establishments Location Quotients – Neepawa vs Division 15 & Manitoba

Industry (NAICS)	Neepawa / Division 15		Neepawa / Manitoba	
	LQ	Classification	LQ	Classification
LQ Health Care and Social Assistance Average	4.4	High	1.9	High
6212 Offices of dentists	0.0*	Low	0.0*	Low
6213 Offices of other health practitioners	2.3	High	0.9	Average
6214 Out-patient care centres	5.4	High	3.0	High
6219 Other ambulatory health care services	0.9	Average	2.5	High
6221 General medical and surgical hospitals	1.4	High	3.1	High
6232 Residential developmental handicap, mental health and substance abuse facilities	1.1	Average	0.7	Average
6239 Other residential care facilities	8.1	High	3.9	High
6242 Community food and housing, and emergency and other relief services	59.4	High	20.4	High

Source: Statistics Canada, Canadian Business Counts Survey, December 2017. Adapted by MDB Insight Inc.

*Data note, The Town of Neepawa reports two dentists and one denturist in the community.



1.3.3 Financial Profile of Businesses

The data from 6,364 Manitoba Health Care and Social Assistance businesses, with revenues ranging from \$30,000 to \$5 million, was collected through Statistics Canada’s Small Business Profiles program to showcase average earnings and costs to businesses. Select financial performance data is outlined below, with a breakdown of operating expenses into major areas of interest.

On average, Manitoba Health Care and Social Assistance businesses spend 33.5% on labour and commissions; 1.7% on amortization and depletion; 3.8% on rent; and 0.0% on utilities and telecommunications.

Table 13: Financial Performance Data for Manitoba Health Care and Social Assistance Businesses 2016

Major Field of Study	Whole Industry	Bottom Quartile	Lower Middle	Upper Middle	Top Quartile
Total Revenue (\$000)	\$392.3	\$46.1	\$141.3	\$348.5	\$1,033.3
Labour & Commissions	\$131.4	\$2.8	\$20.7	\$92.0	\$410.2
Amortization and depletion	\$6.8	\$1.0	\$2.1	\$3.7	\$20.5
Rent	\$14.9	\$2.2	\$5.4	\$11.4	\$40.5
Utilities & Telecommunications	\$3.7	\$1.0	\$2.0	\$3.3	\$8.4
Other Expenses ⁶	\$43.6	\$8.3	\$16.0	\$35.4	\$114.6
Total Expenses (\$000)	\$246.3	\$18.5	\$58.2	\$176.0	\$732.4
Net Profit/Loss (\$000)	\$146.0	\$27.6	\$83.1	\$172.6	\$300.9

Source: Statistics Canada, Small Business Profiles, 2016. Adapted by MDB Insight Inc.



1.3.4 Major Employers

Major Health Care and Social Assistance employers within Neepawa are listed in Table 14. This table is based on primary Health Care and Social Assistance NAICS codes.

Some of the most common sub-sectors of major Health Care and Social Assistance employers in Neepawa include: Social and Rehabilitation Services and Physicians and Health Practitioners which is expected due to high concentrations of business and labour LQs.

Table 14: Major Employers in Neepawa Health Care and Social Assistance Sector

Company	Number of Employees	Health Care and Social Assistance Sub-Sector
Neepawa Health Centre	120	Hospitals
Touchwood Park Association Inc	60	Social and Rehabilitation Services
2625360 Manitoba Association	10	Nursing and Residential Care
Mountain Medical Clinic	8	Physicians and Health Practitioners
Prairie Mountain Health	5	Physicians and Health Practitioners
Neepawa & District Centennial Project Committee Inc	5	Social and Rehabilitation Services
Country Meadows Personal Care Home	N/A	Nursing and Residential Care
Elks Manor	N/A	Nursing and Residential Care
Yellowhead Manor	N/A	Nursing and Residential Care

Source: Hoovers 2018

*Note this list is not exhaustive and is a combination of the Hoovers database and MDB Insight research, employment numbers may be estimates in some cases and may include employers in the area surrounding the community.



1.4 Sector Trends & Outlook

1.4.1 Healthcare Trends

Three major trends that are dominating the Healthcare and Social Assistance sector worldwide include the following.

Aging Population: As Canada's population shifts, demand for Healthcare and Social assistance is growing in 2012, 1 in 7 Canadians was a senior; by 2030, that number will increase to 1 in 4. This extraordinary change in our demographics presents new opportunities for Canadian society. Communities must provide adequate services to ensuring a high quality of life for seniors⁷.

Healthcare Workforce Shortage and Skills Disconnect: Workforce challenges in this sector are occurring across high paying specialty positions and low paying patient support positions. This is issue is exacerbated by demand for new skills specifically in technology to support the modernisation of patient care and the negative perception of homecare occupations. Health care organizations need to integrate new digital technology, robotics, and other automated tools while also utilizing existing talent. Health care providers should embrace strategies where talent can collaborate with technology to improve efficiency instead of competing against each other⁸.

Internet of Things (IoT) and Data Integration: To put simply, the Internet of Things (IoT) combines the idea of internet connectivity with physical devices such as computers, cellphones smart watches and health trackers. From a Healthcare and Social Assistance perspective, IoT technology allows individuals and medical professionals to monitor health indicators in real time. IoT devices used to track Health Care and Social Assistance operations can not only showcase efficiency in real time, but also have the potential for predictive analytics – the ability to use captured data to predict potential health issues and preventative care. The use of these devices will continue to grow as they provide health care providers the ability to improve care remotely and reducing costs.

1.4.2 Manitoba Health Care and Social Assistance Outlook

According to the Manitoba Bureau of Statistics, real GDP growth in Manitoba improved from a low of 1.3% in 2015 to 2.2% in 2017. The Manitoba Finance Survey of Economic Forecasts indicates 2.0% growth in 2018 and 1.6% growth in 2019. This compares to 2.3% and 1.8% growth forecast for Canada in 2018 and 2019, respectively.

The projected overall aging population growth (16% over 65, 12% between 55-64) in Manitoba should support the province's growth in Health Care and Social Assistance. Projected stable government infrastructure spending will add to growth⁹. The selection of the sector under the "Life Sciences" banner

⁷ Government of Canada — Action for Seniors report
Source: canada.ca/en/employment-social-development/programs/seniors-action-report.html

⁸Global Health Care Sector Issues 2018
Source: deloitte.com/global/en/pages/life-sciences-and-healthcare/articles/global-health-care-sector-outlook.html

⁹ Government of Manitoba Economic Review and Outlook
Source: gov.mb.ca/finance/budget18/papers/A_Economic_r.pdf



through Economic Development Winnipeg¹⁰ and the efforts of the Bioscience Association Manitoba to promote the sector is raising the profile of the sector in Canada. Growth in the Health Care and Social Assistance export markets in 2018 should continue with major risk to growth being the potential restrictions on trade implemented by the current American administration¹¹.

Manitoba eHealth

Manitoba is currently utilizing technology to improve service delivery by providing the right information to the right person at the right time in the right place through Manitoba eHealth key initiatives include¹²:

- Electronic Patient Record (EPR)
- eChart Manitoba
- electronic medical records (EMRs)
- eChart Manitoba
- MBTelehealth¹³
- Radiology Information System (RIS)
- Picture Archiving and Communication System (PACS)

1.4.3 Canada Health Care and Social Assistance Outlook

Innovation, Science and Economic Development Canada defines this sector as Health and Biosciences and places Canada 4th behind U.S., U.K., and Germany¹⁴. Overall the growth of Canada's Health Care and Social Assistance sector will continue steadily due to an aging population raising demand for services but opportunities exist to leverage this growth to enhance the sector.

Key challenges facing this sector identified by the government of Canada include:

- Canada has a complex regulatory, reimbursement and procurement processes impede the adoption of innovations
- The current procurement culture is risk-averse and prioritizes short-term focus on cost rather than broader considerations of value
- The current system is disconnected from digital health systems that inhibit the collection, connection and analysis of data needed to inform innovation decision making
- Skills shortages and lack of access to executive level talent hinder the sector's competitiveness

¹⁰Life Sciences

Source: economicdevelopmentwinnipeg.com/key-industries/life-sciences

¹¹RBC Manitoba Provincial Forecast

Source: rbc.com/economics/economic-reports/pdf/provincial-forecasts/man.pdf

¹²Manitoba eHealth

Source: manitoba-ehealth.ca

¹³MB Telehealth

Source: mbtelehealth.ca/

¹⁴Innovation, Science and Economic Development Canada

Source: ic.gc.ca/eic/site/098.nsf/eng/00025.html



- Limited access to capital leads many Canadian firms to exit the market through mergers or acquisitions rather than accrue value domestically

Success in this sector includes improving rates of R&D.

In response to Canada's low rates of R&D and innovation, the Government of Canada announced its Innovation and Skills Plan in their 2017 Budget. Their plan includes providing businesses innovation-specific programming and grants (the Strategic Innovation Fund); supercluster funding and development; increasing venture capital for innovation through the Business Development Bank of Canada; and specific investments to clean technology development and innovation¹⁵.

¹⁵ Government of Canada. (2017). Budget 2017: Canada's Innovation and Skills Plan
Source: budget.gc.ca/2017/docs/themes/innovation-en.html



2. The Neepawa Advantage

2.1 Health Care and Workforce Attraction

Regardless of the lifestyle residents have, proximity to a variety of doctor offices, dentists, and hospitals is an important consideration for making any residential or business location choices.

Neepawa is home to the Neepawa Health Centre, provides primary, secondary, and some tertiary services, including 24/7 emergency, 38 acute care beds, inpatient services, outpatient services, diagnostic services, community rehabilitation services, and home care services. The community is well served by a full complement of doctors, clinics, dentists, and other speciality care providers.

As roughly 20% of Neepawa's residents are over the age of 65, and an additional 10% of residents are between the age of 55 and 64, seniors-specific supports also play a critical role supporting a high quality of life community. Neepawa is home to Country Meadows Personal Care Home, Elks Manor and Yellowhead Manor these facilities provide opportunities for the aging population to maintain an active lifestyle in close proximity to other healthcare service and social and recreational amenities. While the current facilities may be adequate to address the current needs of Neepawa's residents, the aging population may require additional senior healthcare opportunities, including additional home care and senior-specific medical care.

2.2 Core Cluster

2.2.1 Health Care and Social Assistance

The entire sector is a strong cluster for Neepawa through high employment and business count LQs as well as promising employment outlooks. Health Care and Social Assistance is expanding across Manitoba, as demand increases for medical services and residents moving to access these services. In addition, Neepawa's status as a hub for Health Care and Social Assistance services in the region and the community's fast-growing population will continue to draw workforce to service increasing demand.

Government Support

Neepawa has key strengths in Health Care and Social Assistance due to the presence of major a public sector employer in the Neepawa Health Centre. The facility operated by the Prairie Mountain Health/Santé Prairie Mountain (PMH) one of five regional health authorities in the province, is a regional service provider and is a cornerstone for attracting workforce and residents.



2.3 Local & Regional Assets

2.3.1 Healthcare Assets (Prairie Mountain Health)

Neepawa Health Centre (Memorial Hospital)

Services	
Acute Care	38 Beds
Inpatient Services	High Care Needs, Inpatient beds, Obstetrics (Maternity), Palliative Care, Surgery, ENT, Gynecology/obstetrical, Minor Surgery
Outpatient Services	Emergency Services, Chemotherapy
Diagnostic Services	Lab X-ray EKG Ultrasound
Emergency Medical Services	Ambulance Station
Community Rehabilitation Services	Therapy Services
Home Care Services	Meals on Wheels

Neepawa Health Unit

Services	
Home Care	In Home Services, Community Bath Program, Supportive Housing - Yellowhead Manor
Mental Health Services	Adult, Child and Adolescent
Primary Health Care	Diabetes/Heart/Chronic Disease Program
Public Health Services	Families First

Country Meadows Personal Care Home

Services	
Long Term Care	100 Beds
Community Rehabilitation Services	Therapy Services, Facility Respite
Home Care	Adult Day Program, Community Bath Program, Nurse Practitioner

2.3.2 Post-Secondary Institutions

Neepawa Area Collegiate Institute

Neepawa Area Collegiate Institute is a grade 7-12 school located in the Beautiful Plains School Division. The institute has 607 students (2018) enrolled and can provide a solid source of workforce for this sector.

Assiniboine Community College

Assiniboine Community College offers classes in Neepawa and various post-secondary courses on campus in Brandon. The school has been in operation for 55 years in Brandon and offers 40 different



programs including apprenticeship programming in a range of skilled trades disciplines¹⁶. Programs related to this sector include Practical Nursing, Practical Nursing Bridging, Practical Nursing Refresher, Medical Administration and Nursing Foot Care.

Brandon University

Brandon University is 75 km from Neepawa with an enrollment of 3,073 (2015) full-time and part-time undergraduate and graduate students. The current location was founded on July 13, 1899, as Brandon College as a Baptist institution. It was chartered as a university by then President Dr. John E. Robbins on June 5, 1967¹⁷. Programs related to the sector include: Athletic Therapy, Chiropractic Studies, Dental Hygiene* (Partnered with UofM), Dentistry* (Partnered with UofM), Medical Laboratory Sciences, Medical Radiologic Technology, Medicine (Partnered with UofM), Occupational Therapy (Partnered with UofM), Pharmacy (Partnered with UofM), Physical Therapy (Partnered with UofM), Respiratory Therapy (Partnered with UofM), Social Work (Partnered with UofM).

The University of Winnipeg

The University of Winnipeg offers a wide variety of undergraduate and graduate degrees, including a Masters in Management program with focus on technology, innovation and operations. Other notable degrees include the Master in Applied Computer Science, and BA/BSc in Information Systems. The university offers an extensive range of Pre-Professional programs in this sector to prepare students to enter university including: Pre-Chiropractic, Pre-Dental Hygiene, Pre-Dentistry, Pre-Medical Technology, Pre-Medicine, Pre-Occupational Therapy, Pre-Optometry, Pre-Pharmacy, Pre-Physical Therapy, Pre-Radiation Therapy, Pre-Respiratory Therapy, Pre-Social Work and Pre-Veterinary Medicine.

University of Manitoba

The University of Manitoba is the province's largest university, with more than 90 degrees offered across all faculties. Located in Winnipeg, it is home to Manitoba's only law school, accredited MBA program, and engineering faculty, and more. There are a number of research laboratories active on campus, from mechanical to electrical and computer engineering.

The campus is also home to Smartpark Research and Technology Park, a 100-acre site comprised of research and technology companies and organizations involved in Information and Communications Technology, Engineering and Advanced Materials, Health and Biotechnology, and Agricultural and Nutritional Sciences and coincides with research expertise at the University.

Programs related to the sector include: Dental Hygiene* (Partnered with BU), Dentistry* (Partnered with BU), Medical Laboratory Sciences, Medical Radiologic Technology, Medicine (Partnered with BU), Occupational Therapy (Partnered with BU), Pharmacy (Partnered with BU), Physical Therapy (Partnered with BU), Respiratory Therapy (Partnered with BU) and Social Work (Partnered with BU).

¹⁶ Assiniboine Community College
Source: <https://assiniboine.net/about>

¹⁷ Brandon University
Source: <https://www.brandonu.ca/>



2.4 Market Position & Competitiveness

In Healthcare and Social Assistance sector, Neepawa faces major competition from its larger, neighbouring communities. Although it cannot compete with Winnipeg or Brandon in size and location it can compete in areas of quality of life and affordable living.

2.4.1 Strengths & Opportunities

Near Larger Cities with Key Assets & Attraction Potential: Although being near larger cities can have its downfalls it also creates opportunity. Both Brandon and Winnipeg are home to key post-secondary and research assets that are beneficial to creating a highly-skilled workforce. These institutions can also be valuable partners for research and development coordinated with industry. In addition, there is potential for Neepawa to attract businesses and the highly skilled individuals who are looking to leave or expand from Brandon and Winnipeg. These individuals can be attracted to invest in Neepawa through targeted marketing.

Quality of Life & Affordable Living: Many choose to live in Neepawa due to the quality of life the town offers them in terms of family-sized housing affordability as well as the benefits that come from living in a smaller center versus a larger city. These benefits include having all necessary amenities close-by, being more family-oriented in its amenities and activities, being closer to the outdoors, and typically having a stronger-knit community vibe. According to the 2016 Census, the average dwelling value in Neepawa was \$221,776, approximately \$75,668 less than the average dwelling value in Manitoba.

Growing Regional Hub for Surrounding Communities: In addition to its current residential growth, over 1,000 new people moved to Neepawa between 2011 and 2016. The town is a retail and services hub for people from surrounding smaller towns and rural areas, providing a strong customer base for businesses choosing to locate in Neepawa.

Major Local Employers and Facilities: Neepawa has a major regional asset in its hospital facilities that can be used to attract medical professionals and supplementary services to the region. Touchwood Park and the Neepawa Health Centre are major employers creating jobs in the community and drawing residents and supplementary businesses.

2.4.2 Weaknesses

Workforce Retention: Many of the Health Care and Social Assistance jobs available in Neepawa are skilled positions and relatively high paying, but require high specific facilities and support through the regional health authority. A focus needs to be on promoting quality of life in the Health Care and Social Assistance sector to attract businesses and professionals to the community.



3. Appendix (Definitions)

Neepawa Census Subdivision (CSD): Census Subdivision is the general term for municipalities (as determined by provincial/territorial legislation) or areas treated as municipal equivalents for statistical purposes. The Neepawa CSD includes the Town of Neepawa.

Division 15 Census Division (CD): Canada's second-level geographic units are called "census divisions." In terms of size, they generally lie between the top-level administrative divisions of the province and territory and third-level administrative divisions such as sections, townships and ranges. Census divisions are divided into census subdivisions is formed by one or more adjacent municipalities centred on a population centre (known as the core). Manitoba Census Division 15 includes the following CSDs: Rural Municipality of Archie, Rural Municipality of Birtle, Town of Birtle, Rural Municipality of Blanshard Rural Municipality of Clanwilliam, Rural Municipality of Ellice, Town of Erickson, Rural Municipality of Hamiota, Town of Hamiota, Rural Municipality of Harrison, Rural Municipality of Langford, Rural Municipality of Miniota, Town of Minnedosa, Rural Municipality of Minto, Town Neepawa, Rural Municipality of Odanah, Rural Municipality of Park, Town of Rapid City, Rural Municipality of Rosedale, Rural Municipality of Saskatchewan, Rural Municipality of Shoal Lake, Village of St. Lazare and Rural Municipality of Strathclair.

3.1 Notes on Data

In completing this update, MDB Insight reviewed the most recent census data currently available from Statistics Canada. Data was collected for the municipality, Division 15 and the Province of Manitoba. The data analysis examines Neepawa as compared to Division 15 and Manitoba. This regional outlook helps to identify areas of strengths and weaknesses of Neepawa as a whole, leading to a stronger understanding of future opportunities for economic investment.

It is noted that the 2016/2017 information does not reflect on the recent population and employment changes. Information from the 2016 Municipal Census, 2011 Census, Hoovers Businesses data, and EMSI modelling projections was also consulted.

The 2016 Census was used to identify the leading industries within Neepawa. North American Industry Classification System (NAICS) codes were used to identify the top sub-industries for each of the profiles.

Statistics Canada's Canadian Business Counts Data provided a record of business establishments by industry and size. The business data collected for a census subdivision includes all local businesses that meet at least one of the three following criteria:

- Have an employee workforce for which they submit payroll remittances to the Canadian Revenue Agency; or
- Have a minimum of \$30,000 in annual sales revenue; or
- Are incorporated under a federal or provincial act and have filed a federal corporate income tax form within the past three years.

The above data was also used to develop location quotients for each industry within the regional economy. A location quotient represents the concentration of a single industry relative to its proportion of the larger provincial economy. This helps to identify higher than average proportions of an industry to determine local competitive business area of strength.