

New Jersey's Health Care Industry Cluster

Prepared by:
New Jersey Department of Labor & Workforce Development
Office of Research & Information
Bureau of Labor Market Information
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STATE OF NEW JERSEY
DEPARTMENT OF LABOR AND
WORKFORCE DEVELOPMENT



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THE GOAL OF THIS REPORT IS TO GET AN “IDEA” OF WHAT HEALTH CARE MEANS TO NEW JERSEY

Identify the types of industries and establishments that make up the health care cluster based on a standard industry classification system

Describe any similarities and differences among its components with regard to such variables as employment, wage, occupation type, education, and demographic characteristics

Examine any present distinctions within the cluster and its components that give New Jersey a competitive advantage compared to neighboring states, regions or the nation, or show areas where New Jersey could improve to add to the state’s economy

Analyze the current state of the health care cluster and provide an outlook for employment into the future



NEW JERSEY HEALTH CARE HIGHLIGHTS

- The health care cluster contributed nearly \$37 billion to the Gross Domestic Product in 2015, roughly 7.3 percent of all output
- From 1990 through 2016, the health care sector has added 213,200 new jobs, while all other private sector employment has had a net increase of 190,100 jobs
- Health care is the only industry that has added jobs in the state every year from 1990 through 2016 while increasing its share of jobholding from 7.5 percent in 1990 to 11.9 percent in 2016
- The outlook for health care employment is bright. From 2014 through 2024, it is projected that 85,300 jobs will be added, an annual increase of 1.7 percent
- Health care employers paid nearly \$26.3 billion in total wages in 2016, or about 12.4 percent of all wages paid in the private sector



OVERVIEW

There are roughly 21,880 establishments employing nearly 468,800 people of all ages, genders, races, and educational backgrounds in New Jersey in 2016. The majority of these establishments are smaller offices of health care professionals, however, nearly one-third of all employment is found in hospitals.

Occupations found in the healthcare industry vary as much as any other industry. Professionals who have earned the most advanced educational degrees frequently work in teams with those with lesser training. In fact, the majority of occupations in health care do not even require a two-year degree. Average salary tends to correlate with education; the more you learn, the more you earn.

The profile of the average worker in the health care industry is overwhelmingly female and possesses at least some postsecondary education. The workforce is more racially diverse than average, and does not currently face the magnitude of unemployment as is felt in some other industries.



INDUSTRY ANALYSIS



The health care sector can be divided into three major components

Ambulatory Health Care Services

- Offices of Physicians
- Offices of Mental Health Physicians
- Offices of Dentists
- Offices of Chiropractors
- Offices of Optometrists
- Offices of Mental Health Practitioners
- Offices of Specialty Therapists
- Offices of Podiatrists
- Offices of Miscellaneous Health Practitioners
- Family Planning Centers
- Outpatient Mental Health Centers
- HMO Medical Centers
- Kidney Dialysis Centers
- Freestanding Emergency Medical Centers
- Medical Laboratories
- Diagnostic Imaging Centers
- Home Health Care Services
- Ambulance Services
- Blood and Organ Banks

Hospitals

- General Medical and Surgical Hospitals
- Psychiatric and Substance Abuse Hospitals
- Other Hospitals

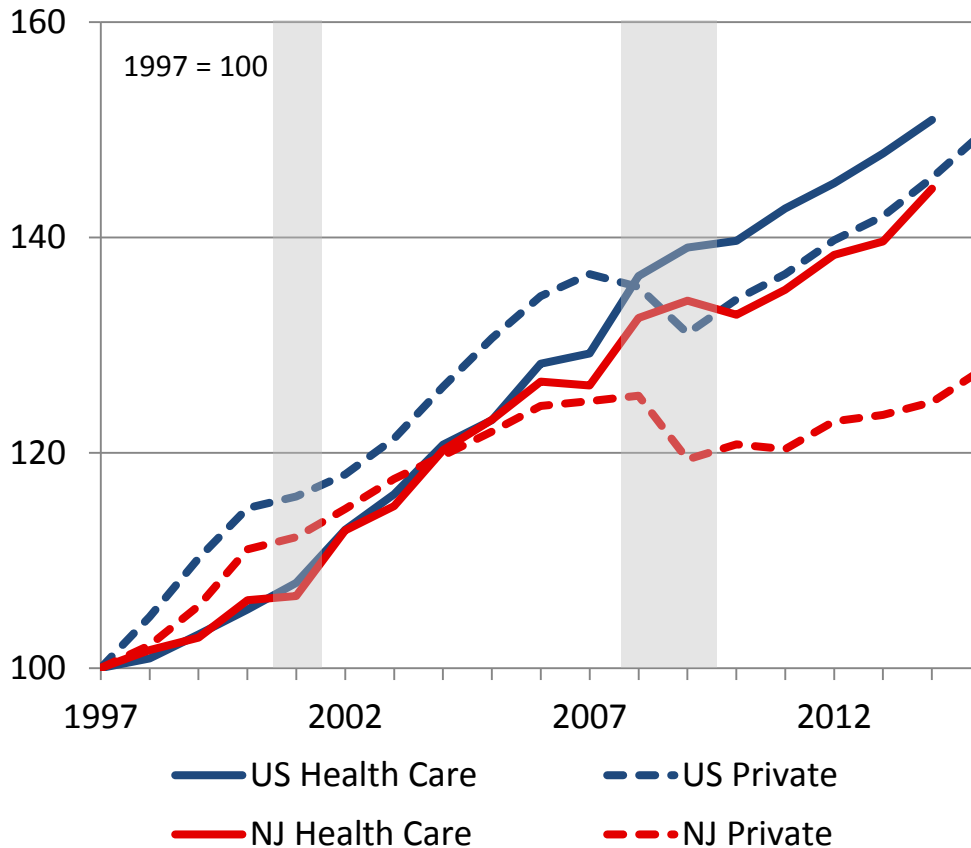
Nursing and Residential Care Services

- Nursing Care Facilities
- Residential Intellectual and Development Disabilities Facilities
- Residential Mental and Substance Abuse Care
- Continuing Care Retirement Communities
- Homes for the Elderly



Gross Domestic Product growth created by the health care industry has been strong and steady over the past 15 years

Indices of GDP in Chained 2009 Dollars
New Jersey and United States: 1997-2015



Output generated from the health care industry in New Jersey has increased steadily from roughly \$25 billion in 1997 to over \$36 billion in 2014

GDP in the health care industry in the United States exceeded \$1 trillion in 2012

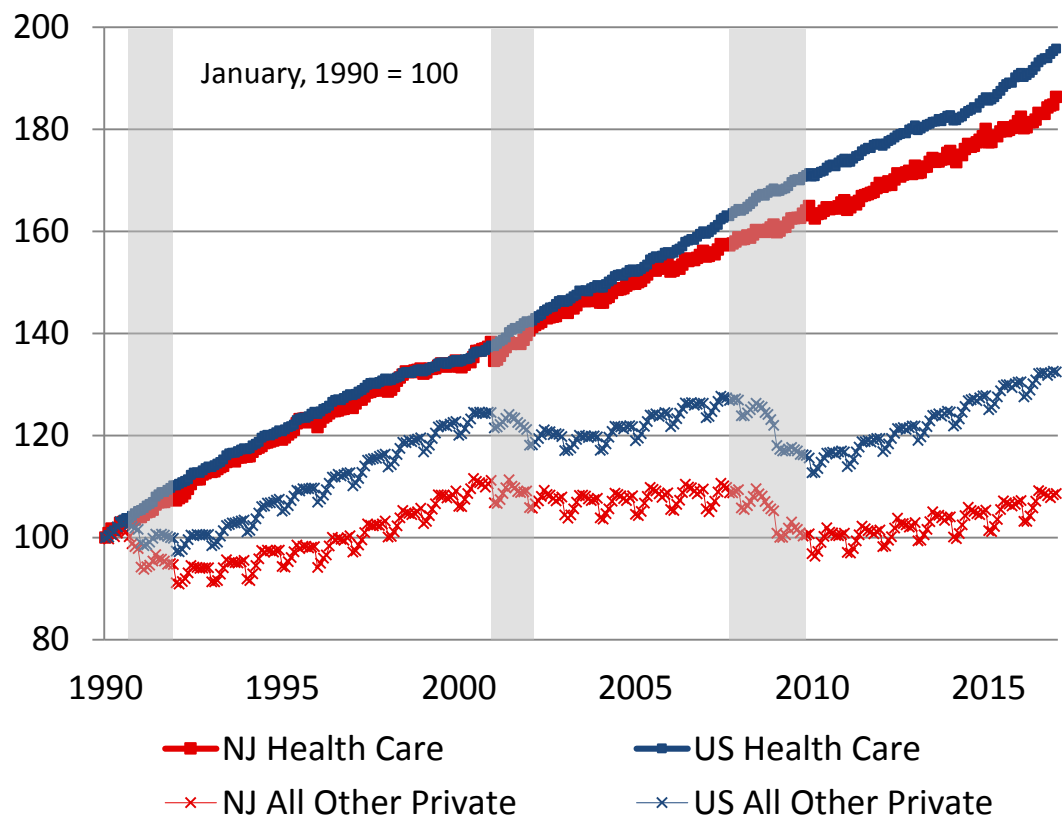
There remains a sizable gap in GDP growth between New Jersey and the United States for both the health care industry and all private industries

Shaded areas indicate recessionary periods as determined by the National Bureau of Economic Research



The health care industry has been the key driver of private sector employment at both the state and national levels

**Health Care and Other Private Sector Employment
New Jersey & United States: 1990-2016**



New Jersey has followed the national trend very closely, but starting in 2005 the nation pulled ahead in terms of faster growth

All other private sector employment has grown at a much slower pace, has experienced seasonal ebbs and flows, and has been susceptible to downturns during recessions

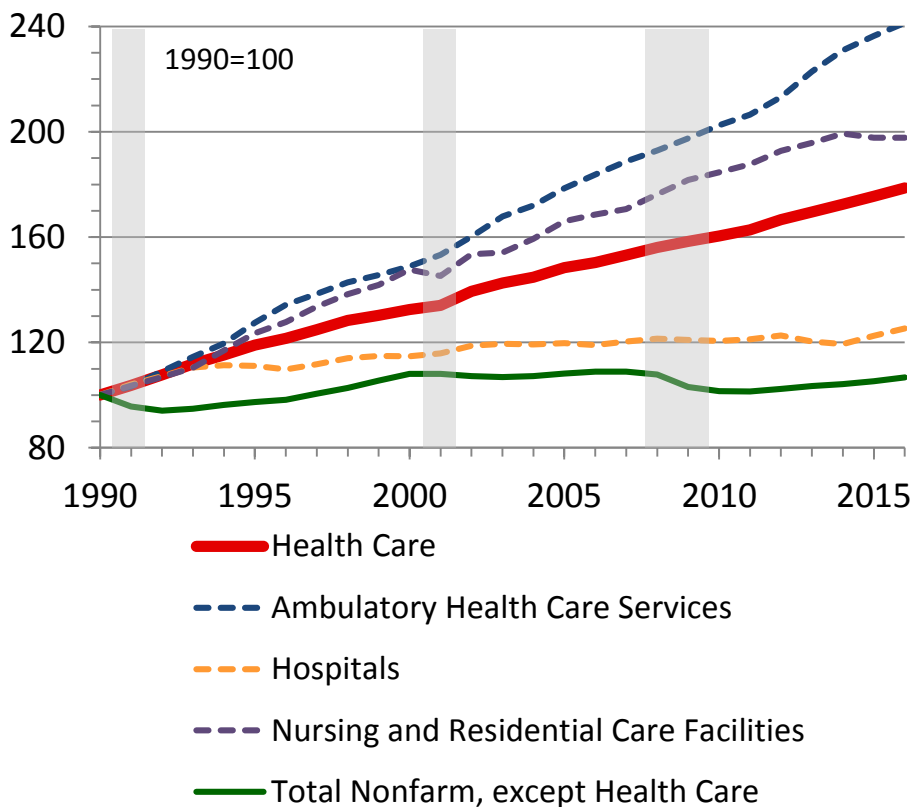
From 2000 to 2016, New Jersey has added 125,100 new health care jobs while the rest of the private sector has lost approximately 69,900

Shaded areas indicate recessionary periods as determined by the National Bureau of Economic Research



The health care industry has been the driving force of employment in New Jersey over the last two decades

Employment Index for Health Care vs. All “other” Industries
New Jersey: 1990-2016



From 1990 through 2016, the health care sector has added 213,200 new jobs, accounting for nearly half of all total nonfarm job growth during that time

Employment in Ambulatory Health Care Services more than doubled over the last 26 years

Employment in Nursing and Residential Care Facilities has nearly doubled from 1990 to 2016

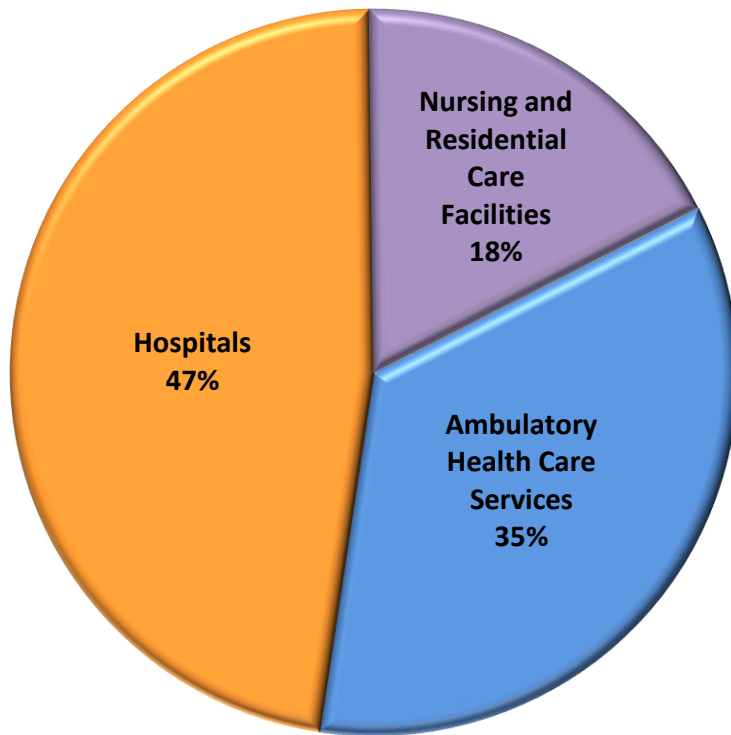
Slow yet steady growth in Hospital employment has led to it being the laggard among health care’s three major components

Shaded areas indicate recessionary periods as determined by the National Bureau of Economic Research

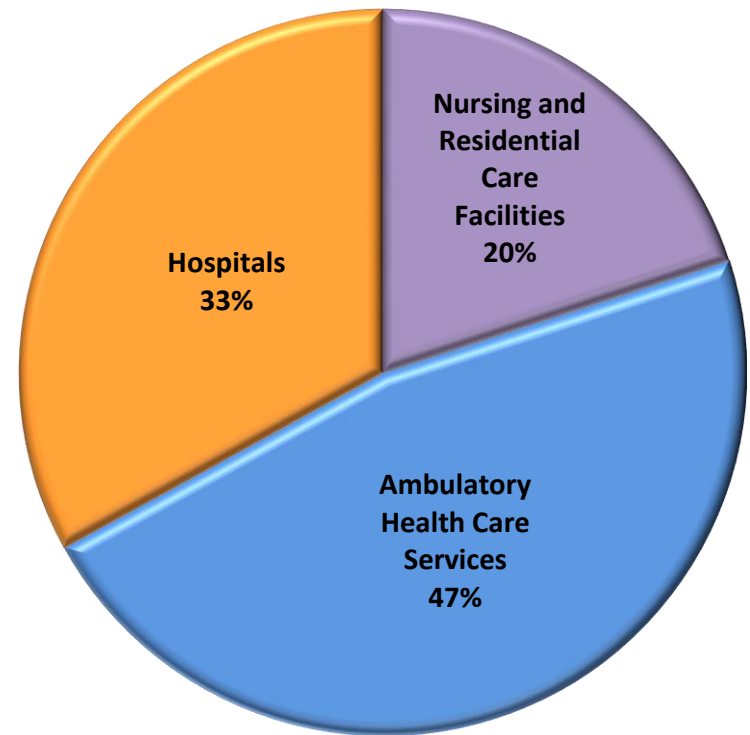
The landscape of health care delivery has changed dramatically over the past 26 years

Employment of Components as a Percentage of Total Health Care
New Jersey, 1990 & 2016

1990



2016



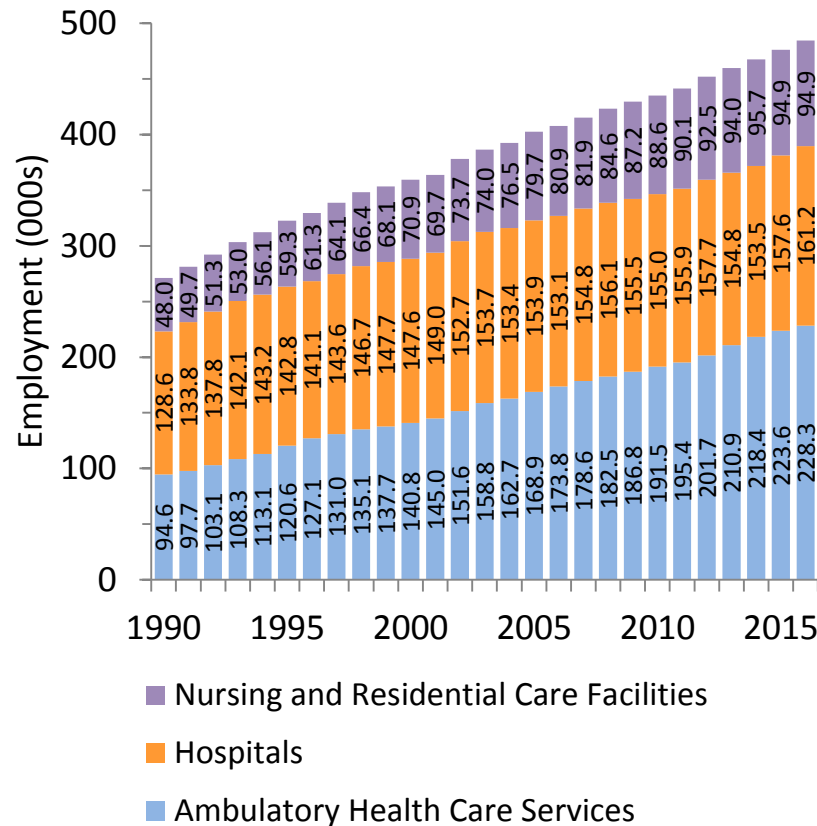
With employment surpassing 484,000, the health care sector accounted for 11.9% of all employment in the state in 2016, up from 7.5% in 1990

Ambulatory Health Care Services surpassed Hospitals as the top employer in the Health Care sector in 2003, and has widened the gap every subsequent year

Nursing and Residential Care Facilities, the smallest component, has grown three times the annual rate (2.7%) of Hospitals (0.9%) since 1990

Together, the three Health Care components have grown by 2.3 percent annually since 1990, compared to only 0.3 percent for all other total nonfarm employment

Employment in Health Care Components
New Jersey, 1990-2016



A closer view of the Great Recession and subsequent recovery highlights the stability of health care employment compared to the rest of the private sector

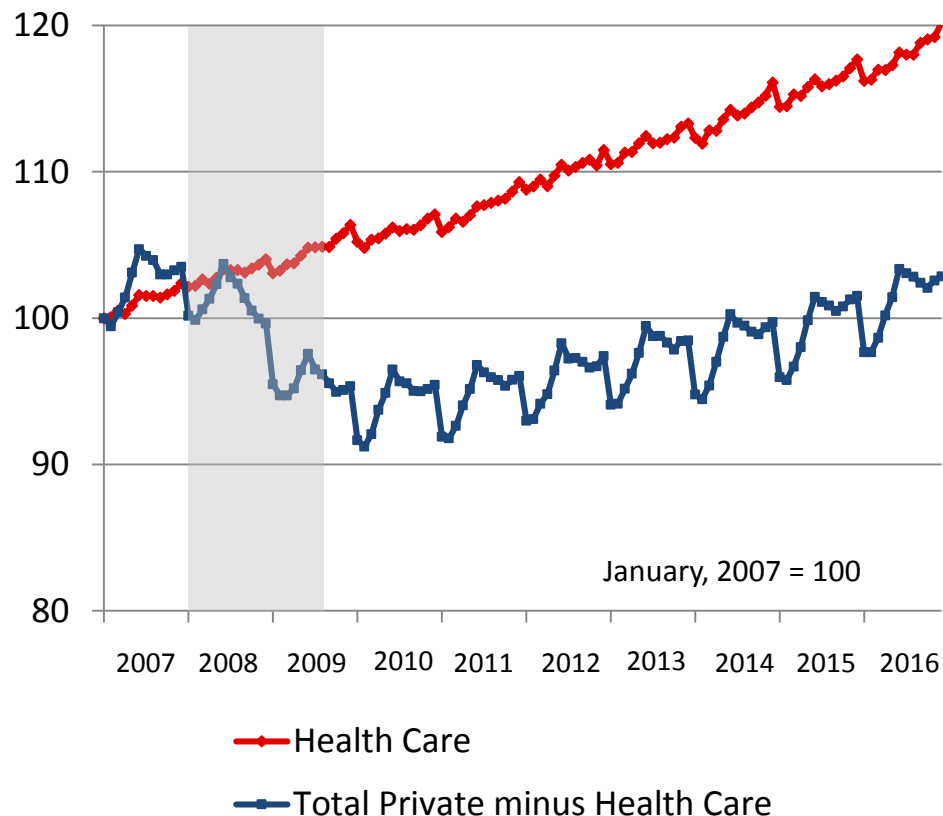
New Jersey's private sector employment reached its not seasonally adjusted pre-Recession peak of nearly 3.5 million jobs in June of 2007

During the 18 months when the recession officially occurred, the health care sector still added nearly 10,000 jobs while the remainder of the private sector lost roughly 175,000

Since the official end of the recession in June of 2009, the health care industry has continued its steady growth while all other private sector employment is just surpassing the point of full recovery

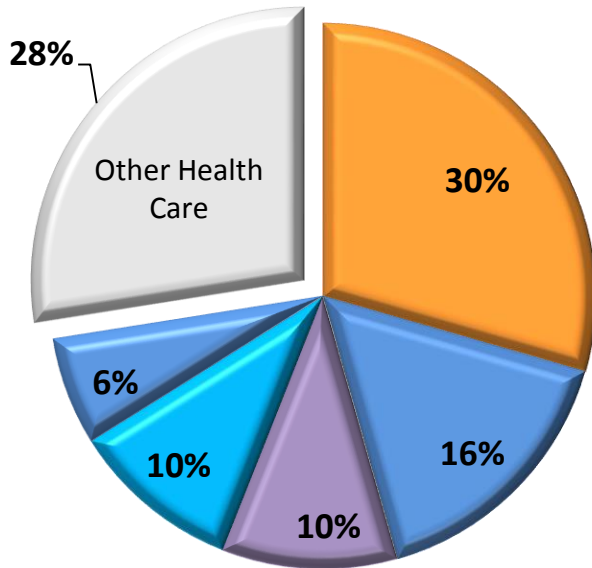
Shaded areas indicate recessionary periods as determined by the National Bureau of Economic Research

Employment in Health Care and All Other Private Sector
New Jersey: January, 2007-January, 2018



In 2016, roughly 73 percent of all health care employment in New Jersey is found in these top five industries

Percentage of Employment
By Detailed Industry
New Jersey, 2016



At the national level, these same five industries make up roughly 72 percent of all health care employment

The health care cluster as a whole makes up 13.9 percent of all employment at the state level, up from 13.5 percent in 2011

Employment in general medical and surgical hospitals has increased by 4,000 jobs in New Jersey, but accounts for only 29.4 percent of all health care employment in 2016, down from 31.4 percent in 2011

- General Medical And Surgical Hospitals
- Offices Of Physicians
- Nursing Care Facilities
- Home Health Care Services
- Offices Of Dentists



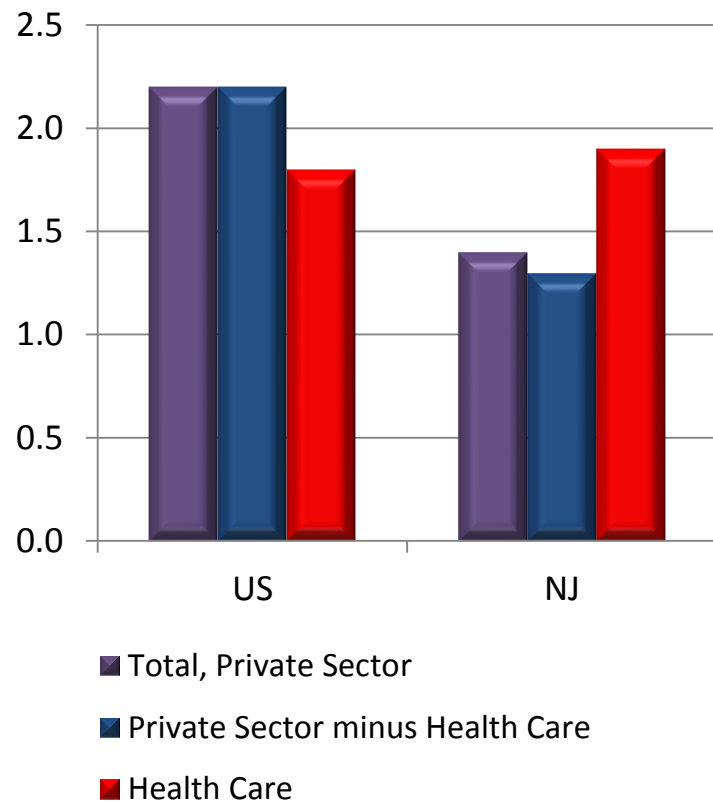
Employment in the health care cluster experienced robust growth of 1.9% in New Jersey from 2011 through 2016

Home Health Care Services and Continuing Care Retirement Facilities together added more than 13,000 workers from 2011 to 2016 as they attempted to keep with the demand for care from an aging Baby Boomer generation.

Nationally, these two industries added 283,000 jobs over the five-year period.

Freestanding Emergency Medical Centers were the fastest growing health care industry in New Jersey, adding over 2,300 jobs, or an annual rate of 9.1 percent

Annual Percentage Change in Employment
New Jersey, 2011-2016



Narrative explaining bubble chart

There are four elements of data depicted in the bubble chart on the next page:

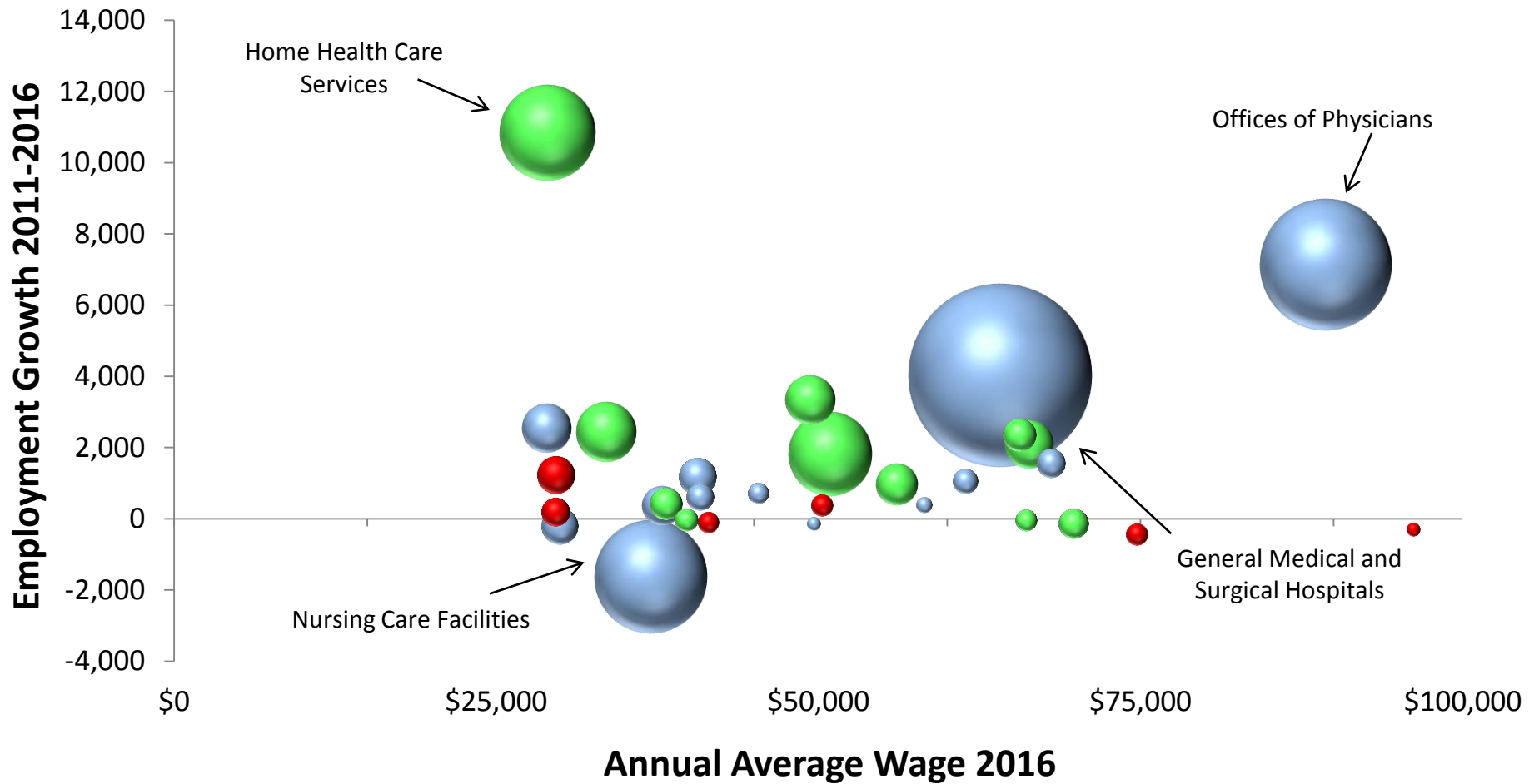
1. **Total 2016 employment** is represented by the **size** of the bubble
2. **Employment change from 2011-2016** is shown by the **position on the Y-axis**, or vertical position
3. **Annual average wages** in 2016 is shown by the **position on the X-axis**, or horizontal position
4. **Location quotient** is indicated by the **color** of the bubble
 - A **green bubble** signifies an industry with a location quotient over 1.2, which indicates that employment share in New Jersey is meaningfully greater than its counterpart at the national level
 - A **red bubble** signifies an industry with a location quotient less than 0.8, which indicates that employment share in New Jersey is meaningfully less than its counterpart at the national level
 - A **blue bubble** indicates that employment share is relatively equal at the state and national level



Employment size, growth, average salary, and location quotient of 30 industries that make up health care sector

Green bubble=LQ>1.2

Red bubble=LQ<0.8



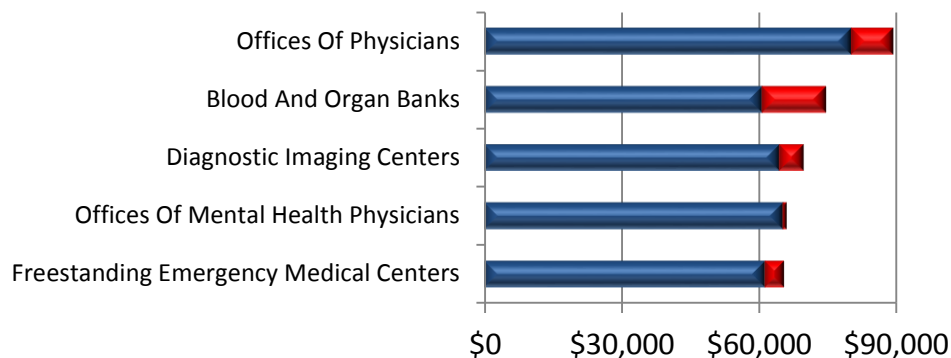
The annual average wage in New Jersey in the health care sector in 2016 was \$56,050, up from \$51,400 in 2011, an increase of \$4,650 or 1.7% per year

Nationally, the health care industry paid an annual average wage of \$53,840 in 2016, up 2.2% per year from \$48,380 in 2011

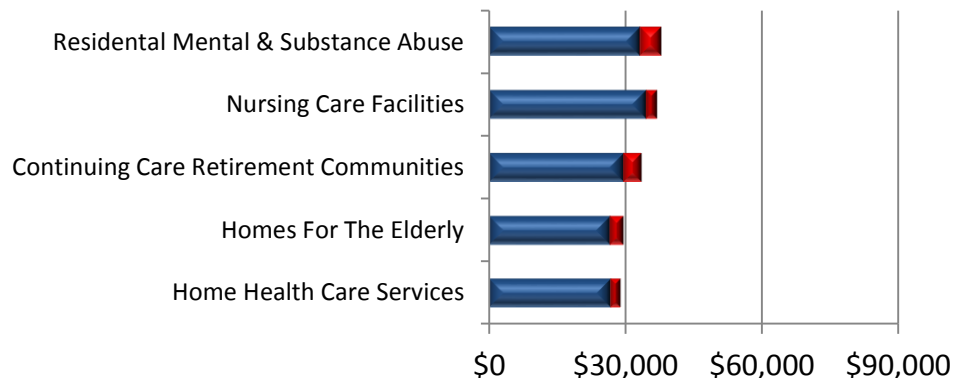
Generally, the highest paying industries provide outpatient services and non-emergency care, like diagnostic imaging and offices of doctors or other specialists

Many of the lowest paying industries are involved with care for the elderly

Highest Five Annual Average Wages, NJ, 2016

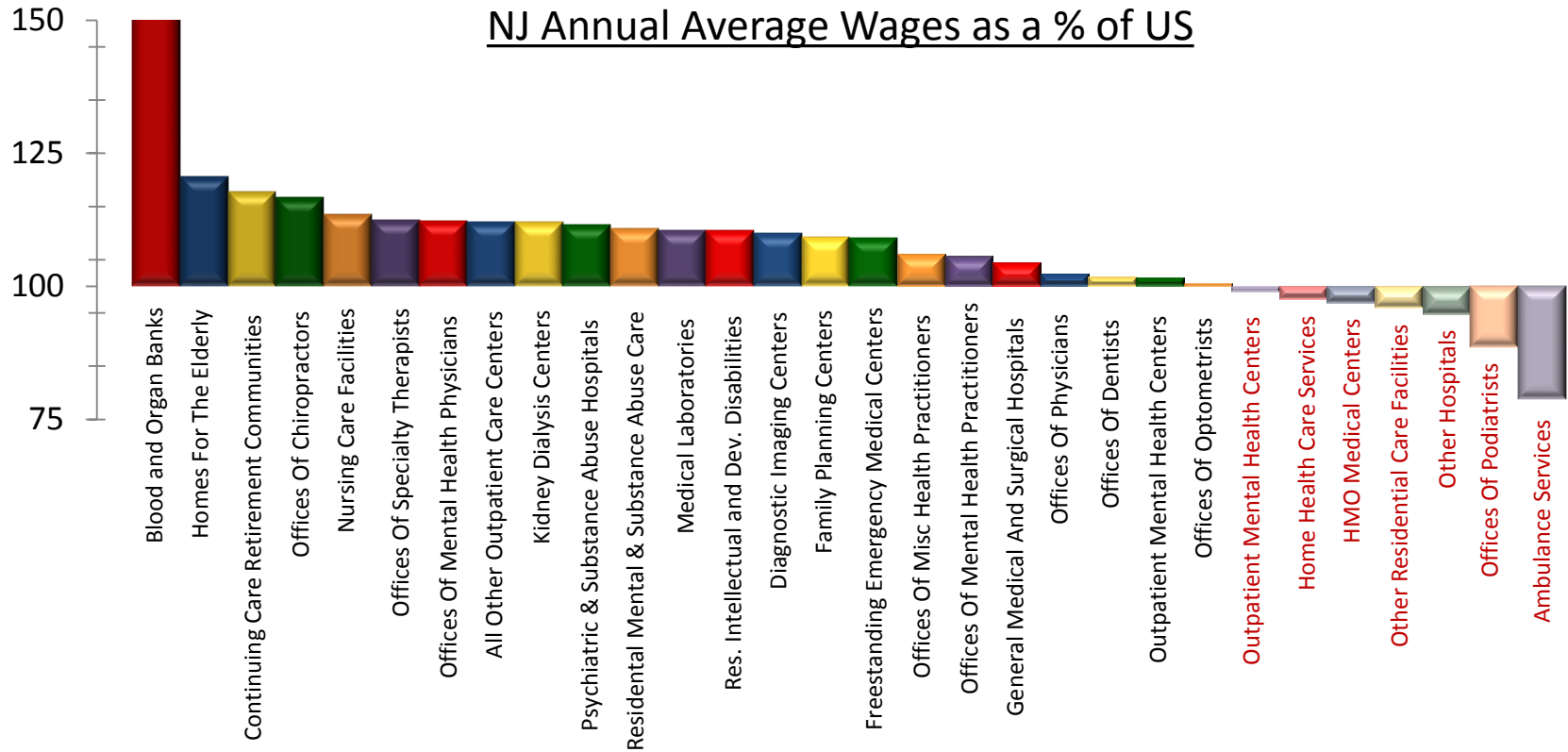


Lowest Five Annual Average Wages, NJ, 2016



■ 2011 Average Annual Salary ■ 2011-2016 Change

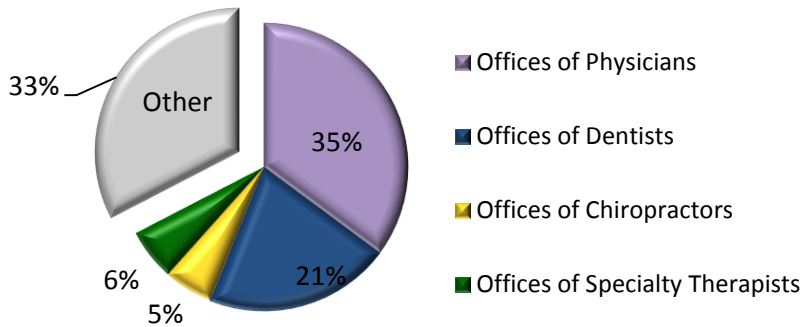
23 out of 30 health care industries in New Jersey have a higher annual average wage than the nation. Overall, the sector paid 4.1% more in New Jersey in 2016 than nationally



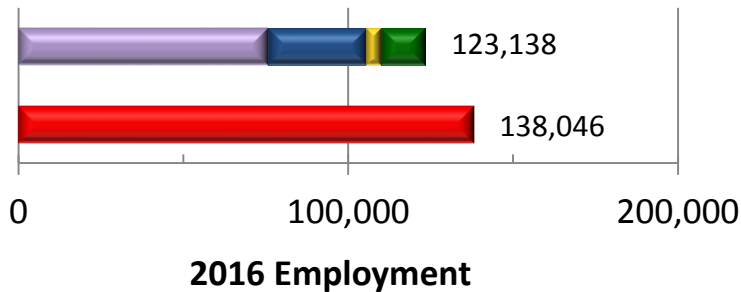
The wage disparity has decreased in 18 of the 30 industries since 2011, when the sector was paid an average of 6.2% more in New Jersey

There were 21,887 health care establishments in New Jersey in 2016, employing 468,000 people

67% of all Health Care establishments fall into these four industries...



...yet the 75 General Medical and Surgical Hospitals (<1% of establishments) employed 12% more in 2016



From 2011 to 2016, New Jersey had a net increase of 368 health care establishments, an increase of 0.3 percent annually (1.8 percent nationally)

Reflecting a nationwide trend from 2011 to 2016, the number of Freestanding Emergency Medical Centers in New Jersey increased from 209 to 263, an five year increase of 25 percent

General Medical and Surgical Hospitals averaged nearly 1,840 employees per establishment in 2016

GEOGRAPHIC ANALYSIS



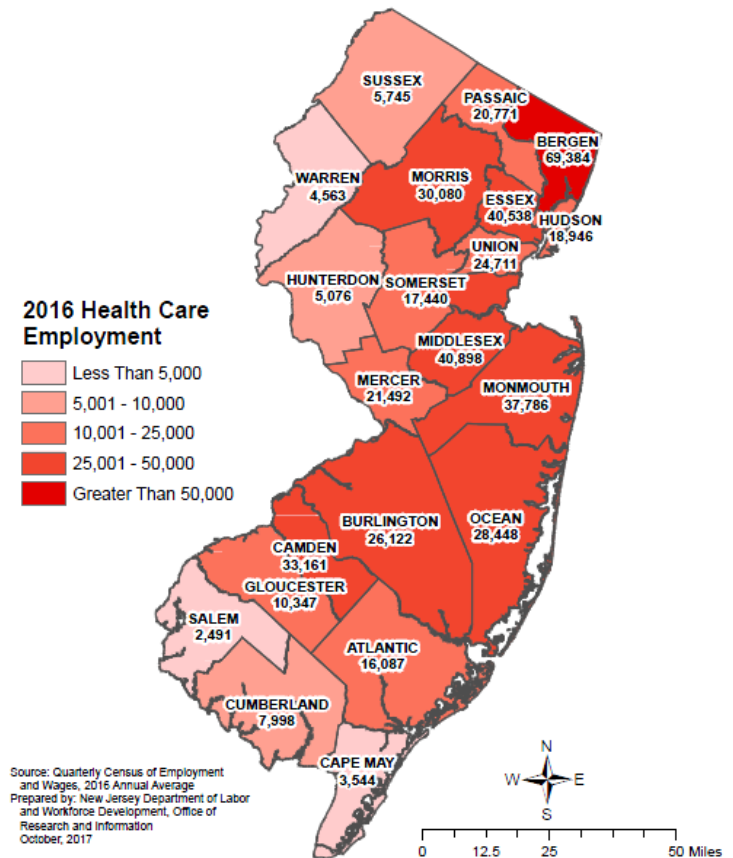
On average, New Jersey employs about one health care worker for every twenty of its residents

Health Care Population to Employment Ratio

Bergen	13.5	Somerset	19.1	Passaic	24.5
Camden	15.4	Cumberland	19.2	Hunterdon	24.6
Monmouth	16.6	Essex	19.7	Sussex	24.8
Morris	16.6	Middlesex	20.5	Salem	25.5
Atlantic	16.8	Ocean	20.8	Cape May	26.6
Burlington	17.2	Union	22.5	Gloucester	28.3
Mercer	17.3	Warren	23.4	Hudson	35.8

While health care employment by county tends to mirror population, there are outliers. Bergen and Camden Counties employ a disproportionately high number of workers to serve its population, and may be viewed as service exporters. Conversely, Hudson and Gloucester Counties have fewer workers per resident and may be more reliant on surrounding areas for health care service.

*Health Care Employment
New Jersey Counties
(2016 Annual Averages)*



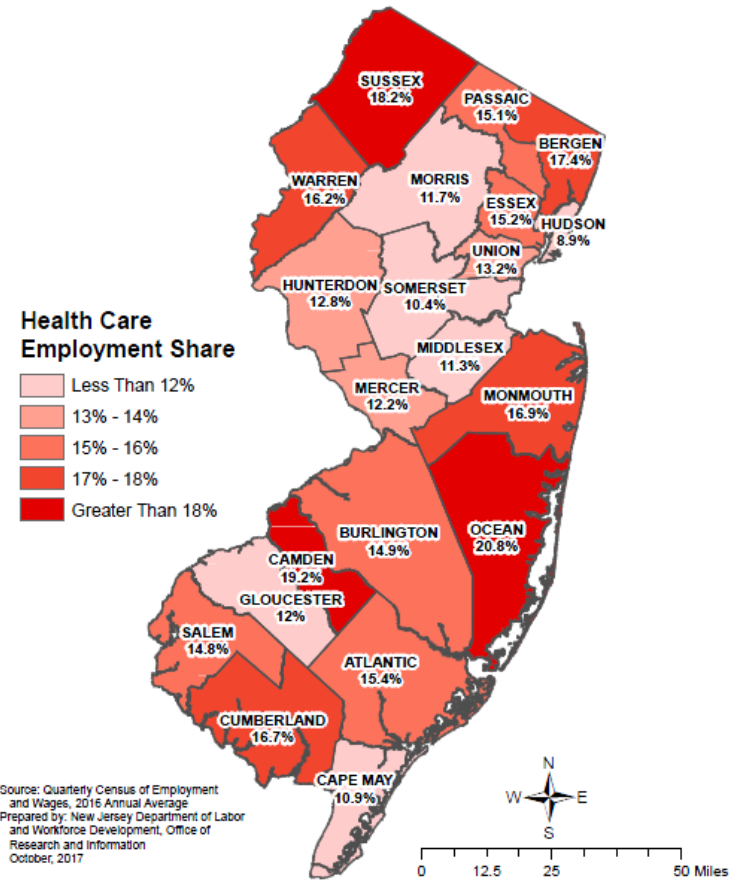
While each county has a very different industrial mix, some are more reliant than others on health care employment

Health Care Share of Total County Employment

Ocean	20.8%	Atlantic	15.4%	Mercer	12.2%
Camden	19.2%	Essex	15.2%	Gloucester	12.0%
Sussex	18.2%	Passaic	15.1%	Morris	11.7%
Bergen	17.4%	Burlington	14.9%	Middlesex	11.3%
Monmouth	16.9%	Salem	14.8%	Cape May	10.9%
Cumberland	16.7%	Union	13.2%	Somerset	10.4%
Warren	16.2%	Hunterdon	12.8%	Hudson	8.9%

Ocean and Camden Counties have the largest proportion, roughly 1 of every 5, of their employment in some form of health care. Hudson and Somerset have very different compositions and engage less than 11 percent of total employment in the health care industry.

Health Care Employment as a Percentage of Total County Employment



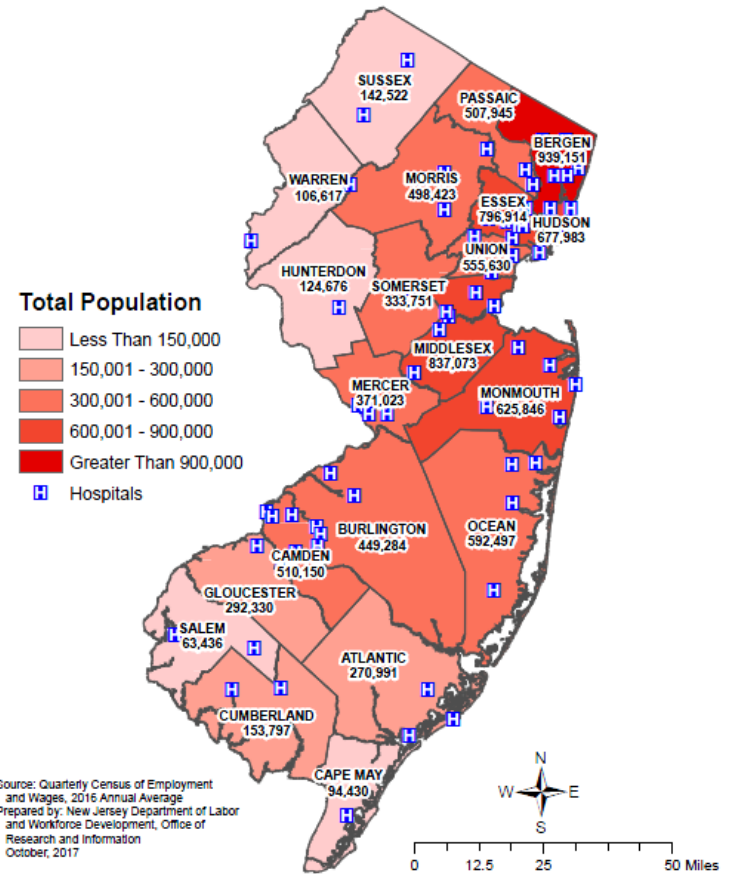
There are 75 hospitals in New Jersey that serve the state's population of more than 8.9 million residents

Number of Hospitals by County

Essex	9	Mercer	4	Passaic	2
Middlesex	7	Morris	4	Salem	2
Bergen	6	Ocean	4	Sussex	2
Hudson	6	Atlantic	3	Warren	2
Camden	5	Union	3	Cape May	1
Monmouth	5	Cumberland	2	Hunterdon	1
Burlington	4	Gloucester	2	Somerset	1

The hospital locations tend to be clustered around the state's two primary highways, the New Jersey Turnpike (Interstate 95) and the Garden State Parkway, and near high population centers across state boundaries from New York City and Philadelphia.

*Hospital Locations and County Population
New Jersey, 2016*



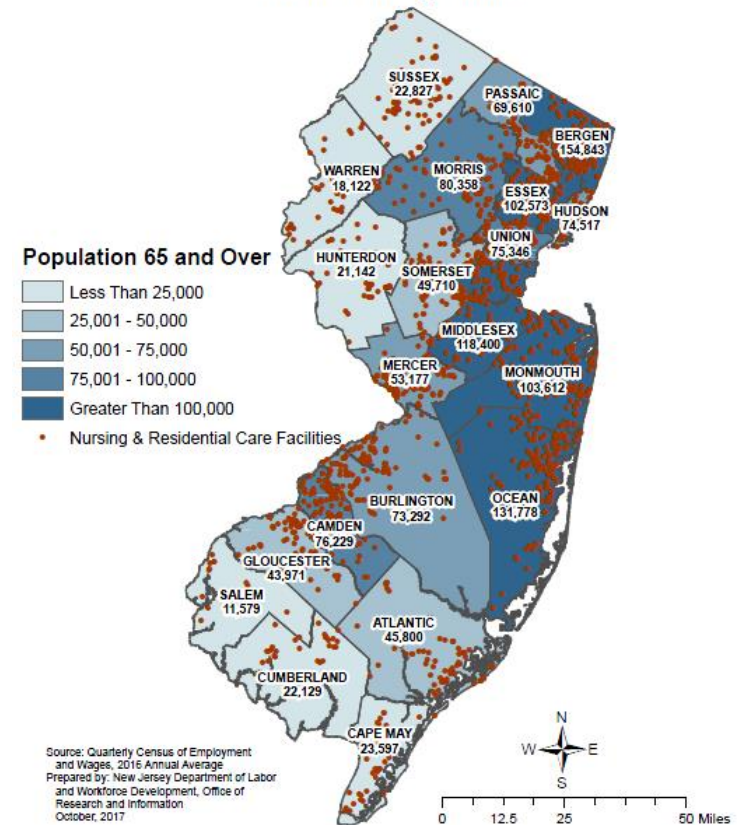
New Jersey's aging population has created increased demand for health care services, especially in the areas of nursing and residential care

Percentage of County Population Aged 65 and Over

Cape May	25.0%	Bergen	16.5%	Cumberland	14.4%
Ocean	22.2%	Burlington	16.3%	Mercer	14.3%
Salem	18.3%	Morris	16.1%	Middlesex	14.1%
Warren	17.0%	Sussex	16.0%	Passaic	13.7%
Hunterdon	17.0%	Gloucester	15.0%	Union	13.6%
Atlantic	16.9%	Camden	14.9%	Essex	12.9%
Monmouth	16.6%	Somerset	14.9%	Hudson	11.0%

Nursing and residential care facilities are well positioned throughout the state, providing coverage to even the less populated areas. Clusters of locations are found near the population centers and along the coast, where a larger share of those aged 65 and over reside.

*Nursing and Residential Care Facility Locations and County Population 65 and Over
New Jersey, 2016*



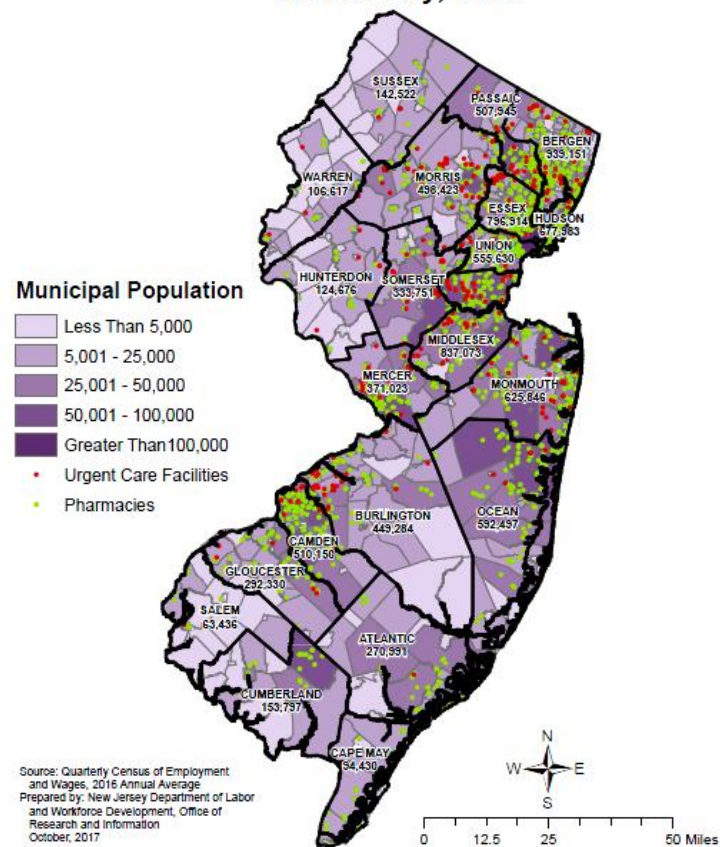
Urgent care facilities and pharmacies provide support to the health care system and their proximity can be a large convenience to residents

The number of urgent care facilities (aka. freestanding emergency medical centers) has nearly doubled from 139 in 2004 to 263 in 2016. These centers provide triage care for non life-threatening emergencies and alleviate the stress on traditional emergency rooms in hospitals

Employment in these urgent care facilities has more than doubled from 2,712 in 2004 to 6,674 in 2016 as their popularity continues to spread

The number of pharmacies has increased by more than 50 percent from 2004 to 2016, and most New Jersey residents now live within a short drive of the nearest location

*Urgent Care Facility and Pharmacy Locations and Municipal Population
New Jersey, 2016*



There are ten hospitals with trauma centers in New Jersey; three level 1 and seven level 2

Trauma is any physical injury caused by violence or other forces. The three types of serious trauma are penetrating, blunt, or burns. Trauma centers are specially equipped hospital where the immediate availability of specialized personnel, equipment and capabilities is guaranteed 24 hours a day.

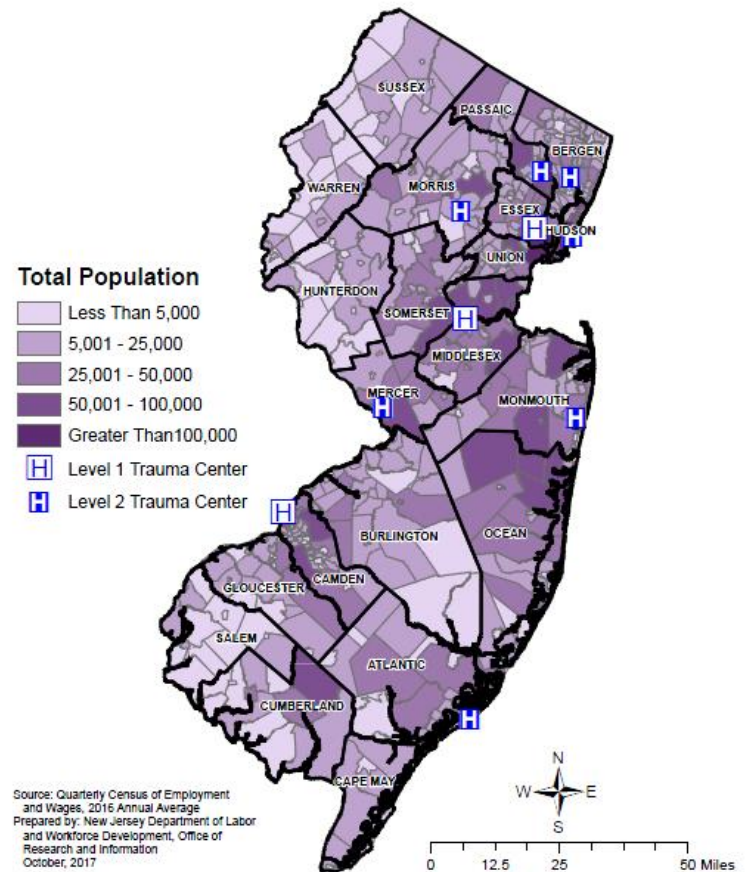
Level 1 trauma centers must treat a minimum of 600 patients per year and are university-affiliated teaching hospitals:

- ❖ University Hospital, Newark
- ❖ Robert Wood Johnson Hospital, New Brunswick
- ❖ Cooper Hospital, Camden

Level 2 trauma centers also provide definitive trauma care and must treat a minimum of 350 patients per year:

- ❖ Hackensack University Medical Center, Hackensack
- ❖ St. Joseph's Hospital, Paterson
- ❖ Jersey City Medical Center, Jersey City
- ❖ Morristown Memorial Hospital, Morristown
- ❖ Capital Health System at Fuld, Trenton
- ❖ Jersey Shore Medical Center, Neptune
- ❖ AtlantiCare Regional Medical Center, Atlantic City

*Trauma Center Locations and Municipal Population
New Jersey, 2016*



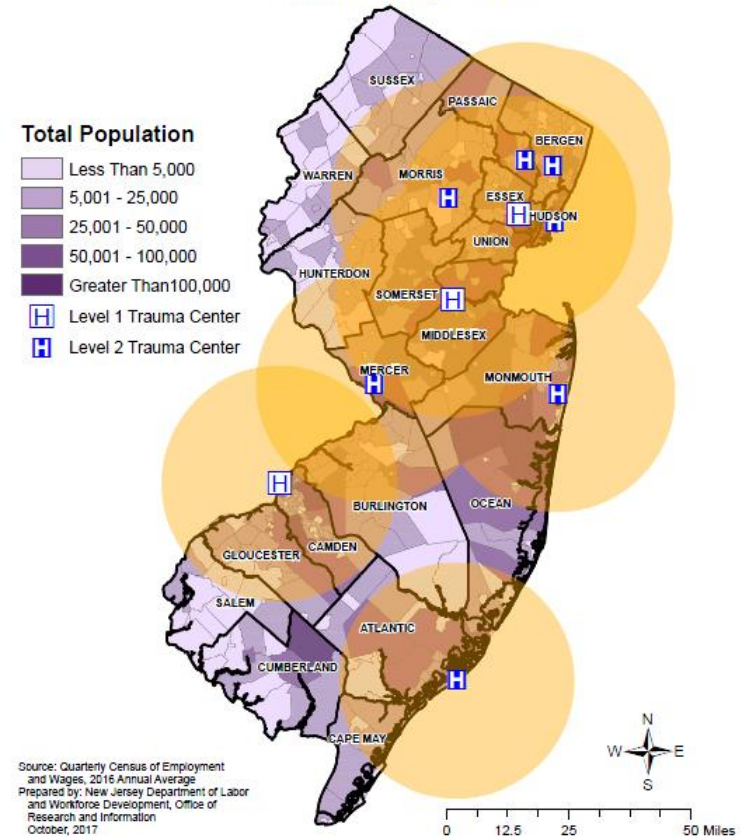
This map shows the general proximity of each of the ten trauma centers to the population of the state's municipalities

82 percent of the state's population resides in municipalities within 25 miles of a level 1 trauma center, and 96 percent live within 25 miles of either a level 1 or level 2 trauma center

There are gaps in coverage in the more sparsely populated northwest and extreme southern parts of the state

The only municipality of more than 50,000 outside the 25 mile radius is Vineland in Cumberland County. Neighboring cities of Millville and Bridgeton, each with more than 25,000 residents, are also located outside the 25 mile radius

*25 Mile Radius Around Trauma Center Locations and Municipal Population
New Jersey, 2016*

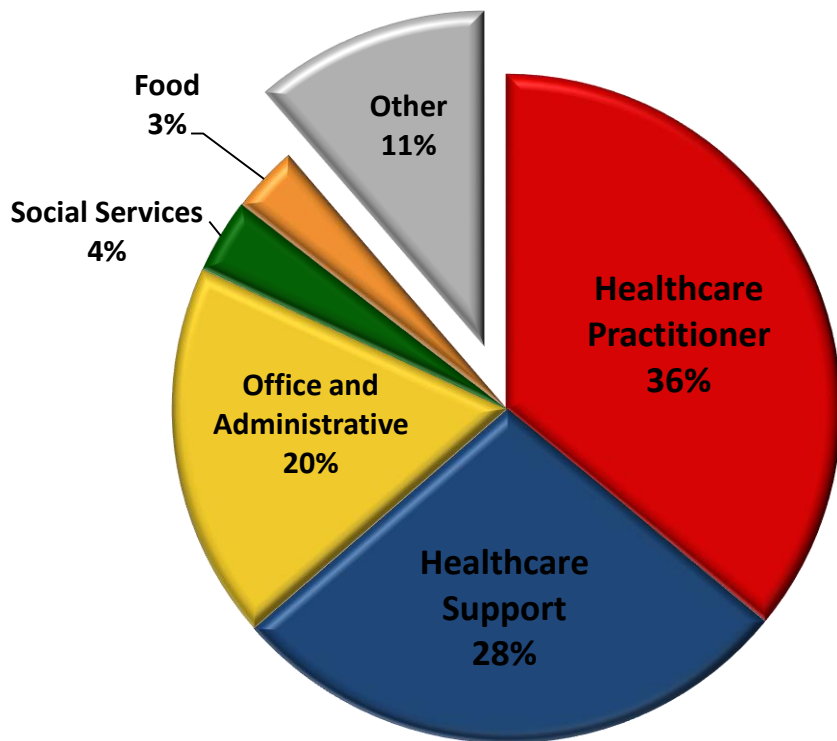


OCCUPATIONAL ANALYSIS



Nearly two-thirds of workers in the health care industry are directly involved with patient care in 2016

Breakdown of Major Occupational Groups within
Health Care Industry:
New Jersey, 2016



Office and administrative occupations are the third largest group, employing about one-fifth of the health care workforce. Receptionists, medical secretaries and billing clerks are the most prominent occupations.

Social sciences and food related occupations make up a relatively small, but integral portion of the workforce

Most of the remainder of the workforce is comprised of management and other service occupations



The top twenty occupations found in health care make up more than two-thirds of all employment in the industry

Occupation	2016 Employment	Share of Industry	Average Salary	Minimum Educational Requirement
Total All Health Care Occupations	476,420	100.0%	\$56,040	
Top 20 Occupations	321,340	67.4%	\$55,510	
Registered Nurses	67,630	14.2%	\$80,580	Bachelor's degree
Nursing Assistants	47,600	10.0%	\$28,980	Postsecondary nondegree award
Home Health Aides	34,220	7.2%	\$23,240	No formal educational credential
Receptionists and Information Clerks	33,220	7.0%	\$31,450	High school diploma or equivalent
Medical Assistants	17,200	3.6%	\$35,250	Postsecondary nondegree award
Licensed Practical and Licensed Vocational Nurses	13,530	2.8%	\$53,740	Postsecondary nondegree award
Physicians and Surgeons	13,360	2.8%	\$205,910	Doctoral or professional degree
Medical Secretaries	11,300	2.4%	\$41,180	High school diploma or equivalent
Dental Assistants	10,060	2.1%	\$41,460	Postsecondary nondegree award
Nonrestaurant Food Servers	9,620	2.0%	\$24,040	No formal educational credential
Medical and Health Services Managers	8,740	1.8%	\$119,410	Bachelor's degree
Billing and Posting Clerks	7,770	1.6%	\$41,510	High school diploma or equivalent
Maids and Housekeeping Cleaners	7,760	1.6%	\$25,080	No formal educational credential
Social and Human Service Assistants	7,130	1.5%	\$36,960	High school diploma or equivalent
Physical Therapists	6,220	1.3%	\$96,890	Doctoral or professional degree
Emergency Medical Technicians and Paramedics	5,800	1.2%	\$37,460	Postsecondary nondegree award
Dental Hygienists	5,760	1.2%	\$84,180	Associate's degree
Radiologic Technologists and Technicians	5,510	1.2%	\$64,750	Associate's degree
Medical and Clinical Laboratory Technologists	4,750	1.0%	\$69,160	Bachelor's degree
Phlebotomists	4,160	0.9%	\$37,430	Postsecondary nondegree award



Health Care Practitioner



Health Care Support



Office & Administrative



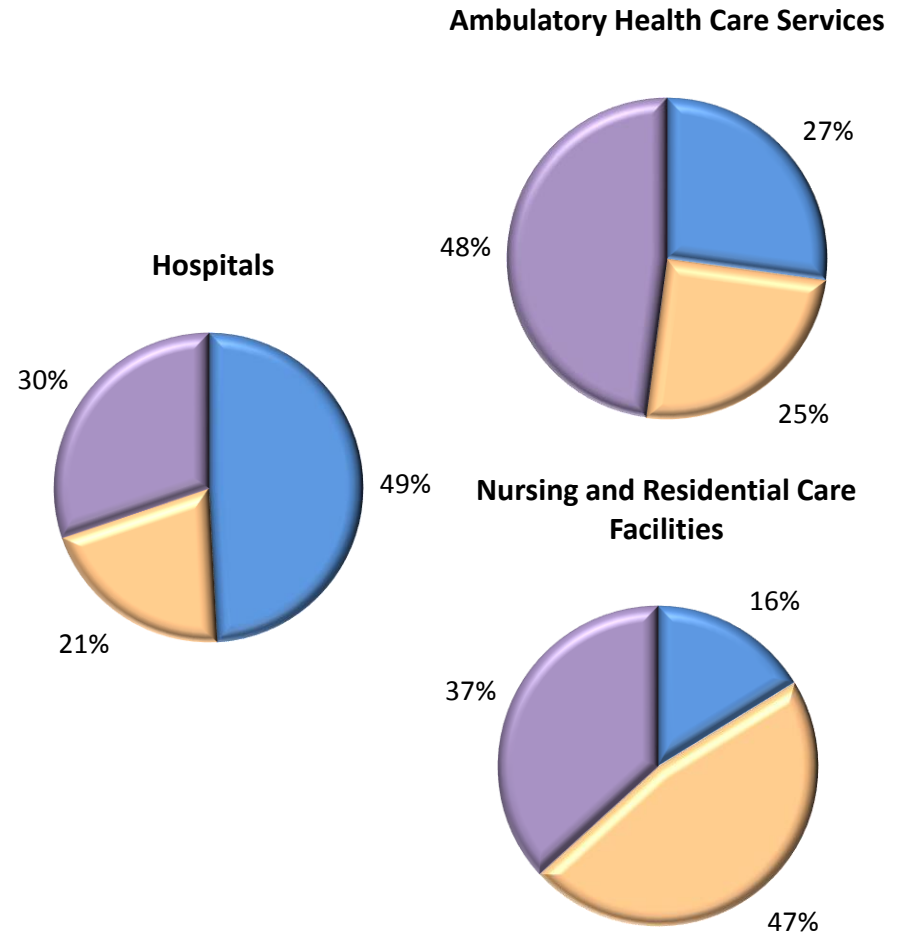
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DEPARTMENT OF LABOR AND
WORKFORCE DEVELOPMENT



Source: NJLWD, Occupational Employment Statistics Survey, May 2015
Prepared by: New Jersey Department of Labor and Workforce Development
January, 2018

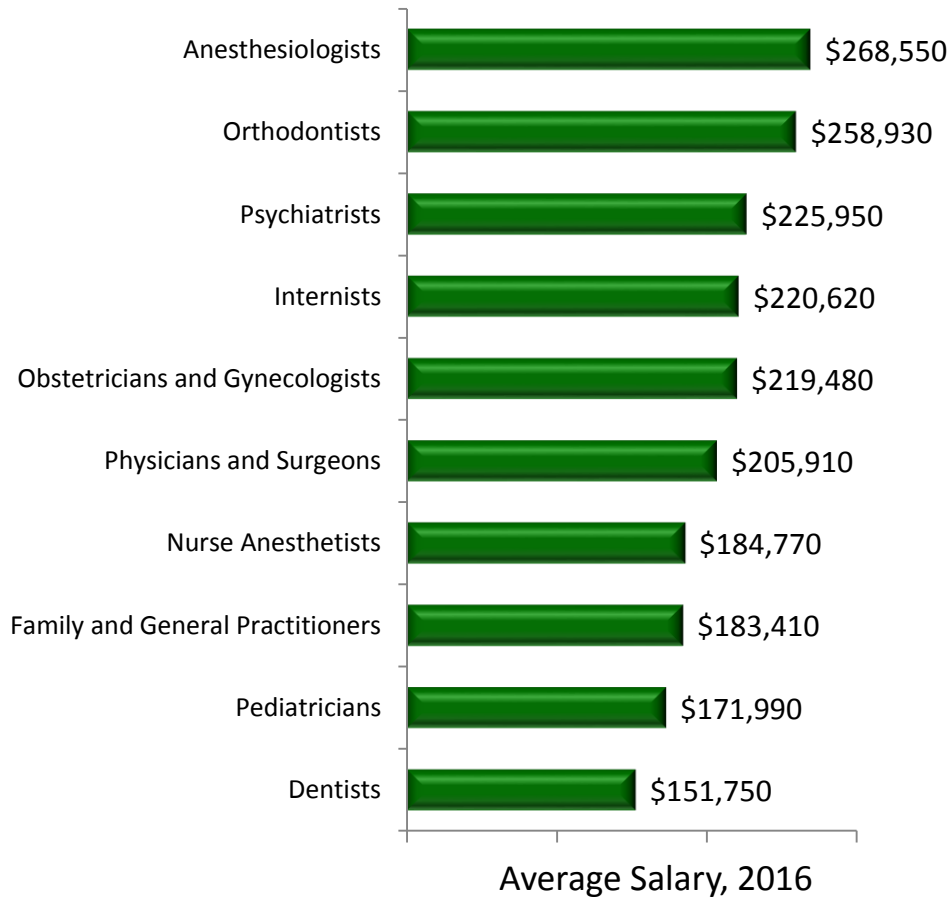
The health care sector offers opportunities for employment for all levels of education and experience...

Minimum Education Requirements	2016 Employment	% of Total
Total Health Care Occupations	476,420	100.0%
Total High Requirements	152,270	32.0%
Doctoral or professional degree	35,680	7.5%
Master's degree	17,960	3.8%
Bachelor's degree	98,630	20.7%
Total Moderate Requirements	131,550	27.6%
Associate's degree	24,430	5.1%
Postsecondary nondegree award	104,390	21.9%
Some college, no degree	2,730	0.6%
Total Low Requirements	188,380	39.5%
High school diploma or equivalent	124,590	26.2%
No formal educational credential	63,790	13.4%

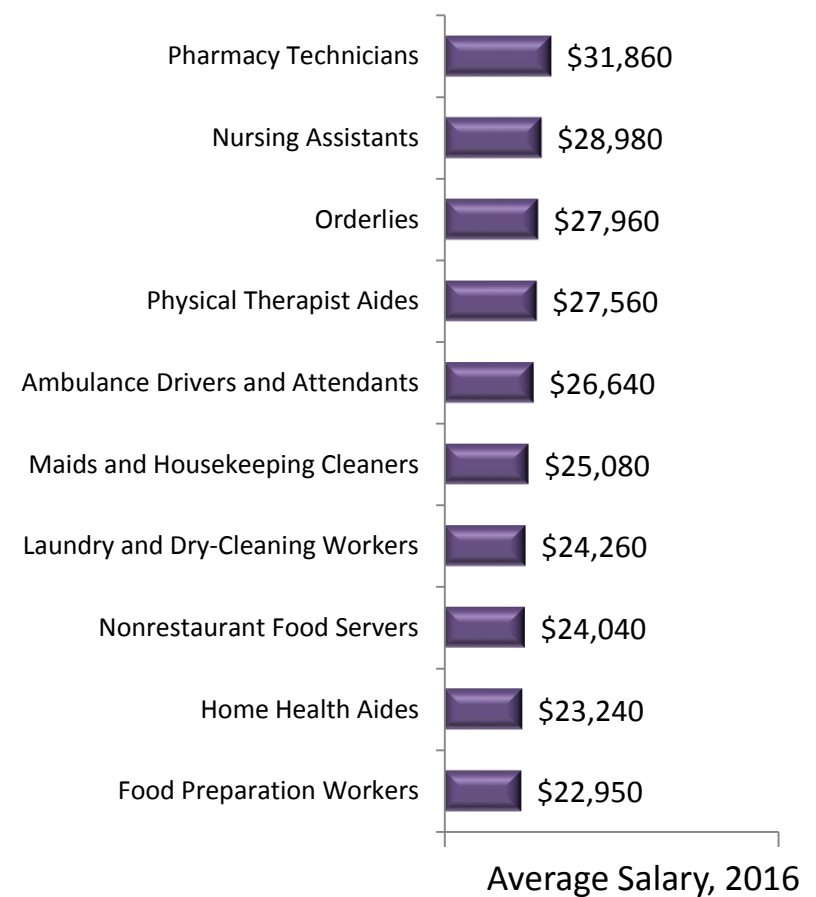


...and the average salary can vary greatly among a myriad of different occupations

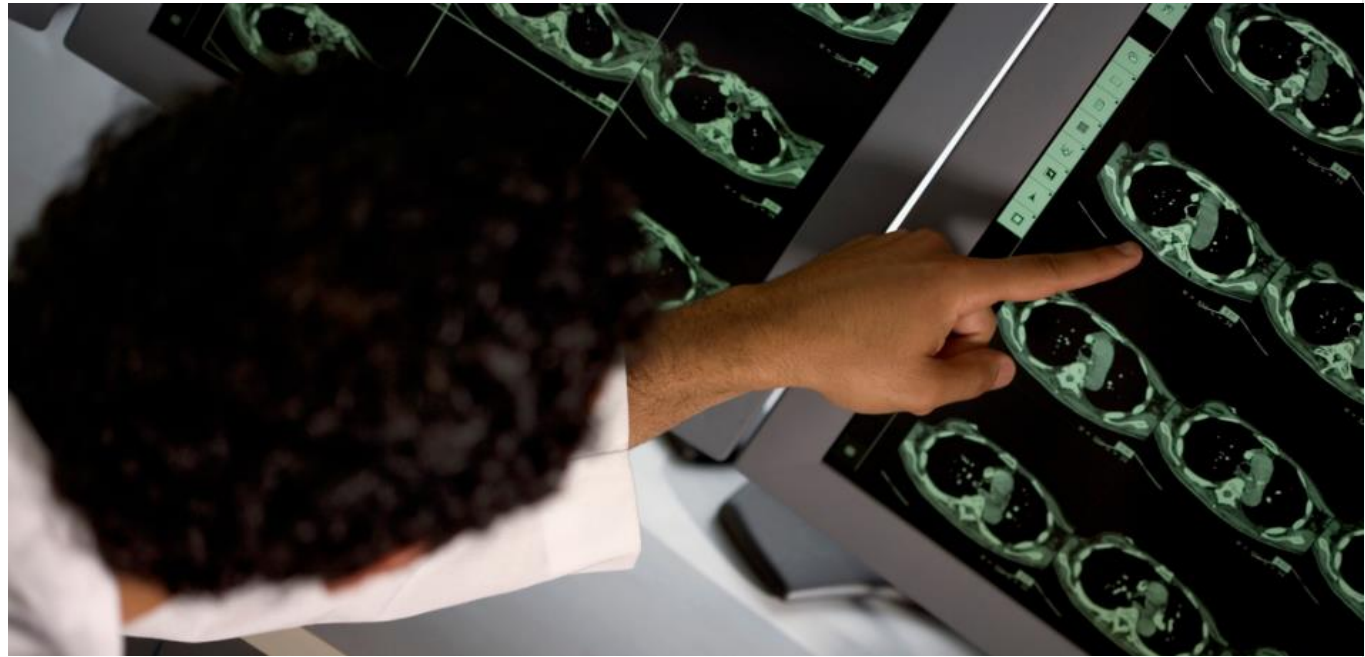
Occupations on the Higher End of the Salary Scale



Occupations on the Lower End of the Salary Scale



DEMOGRAPHIC PROFILE



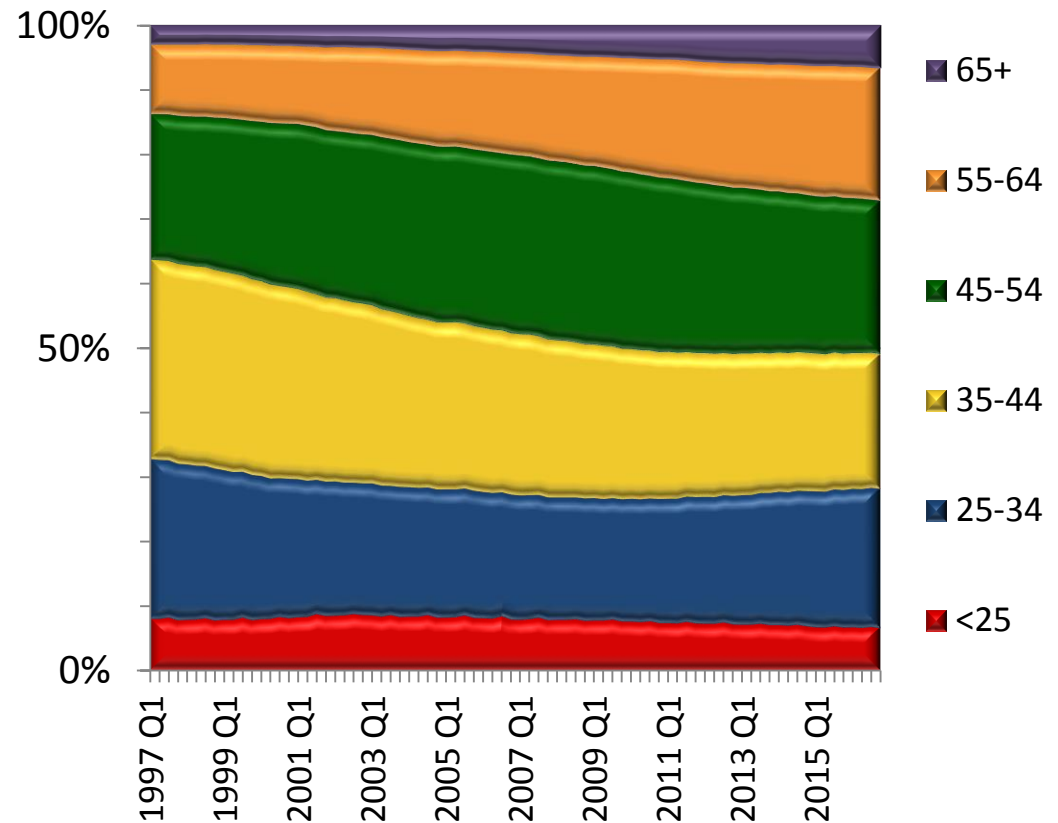
Data shows a steady and gradual change toward an older workforce in nearly every age cohort

The number of healthcare workers aged 65 and older has tripled from 1997 to 2016

From 1997 to 2016, the number of workers aged 55-64 has increased by more than 60,000

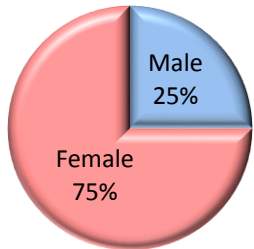
The only age cohort with fewer workers in 2016 than in 1997 were those between the ages of 35-44

Breakdown of Workforce by Age
New Jersey: 1997-2016

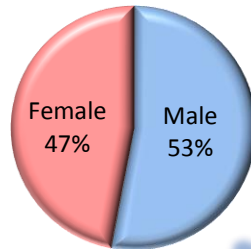


Gender, racial, and ethnic profile of New Jersey residents within health care workforce

Health Care



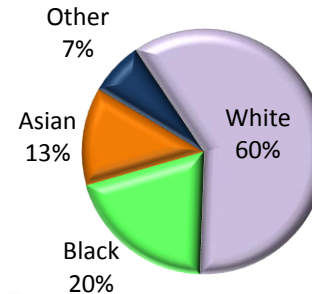
All Industries



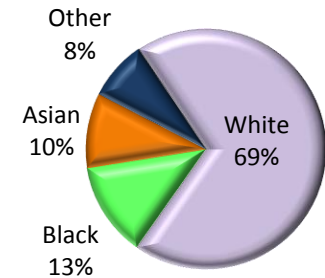
Females outnumber males by a 3 to 1 margin in the health care workforce

The workforce is more diverse than average, particularly among the black and Asian populations

Health Care

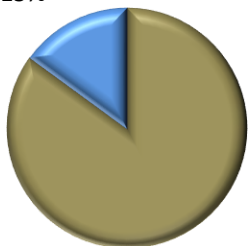


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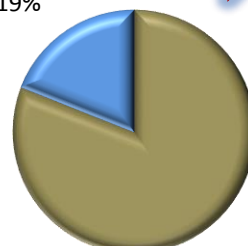


The workforce has just slightly fewer Hispanics than average

Health Care



All Industries



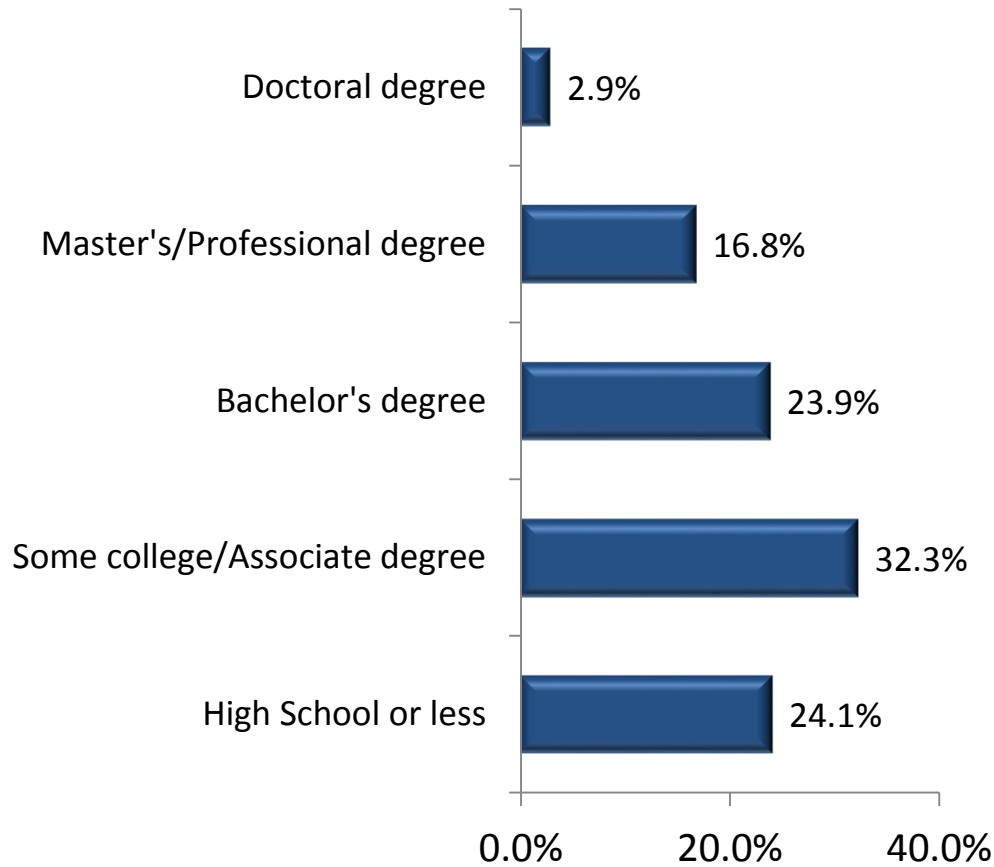
Health Care

All Industries

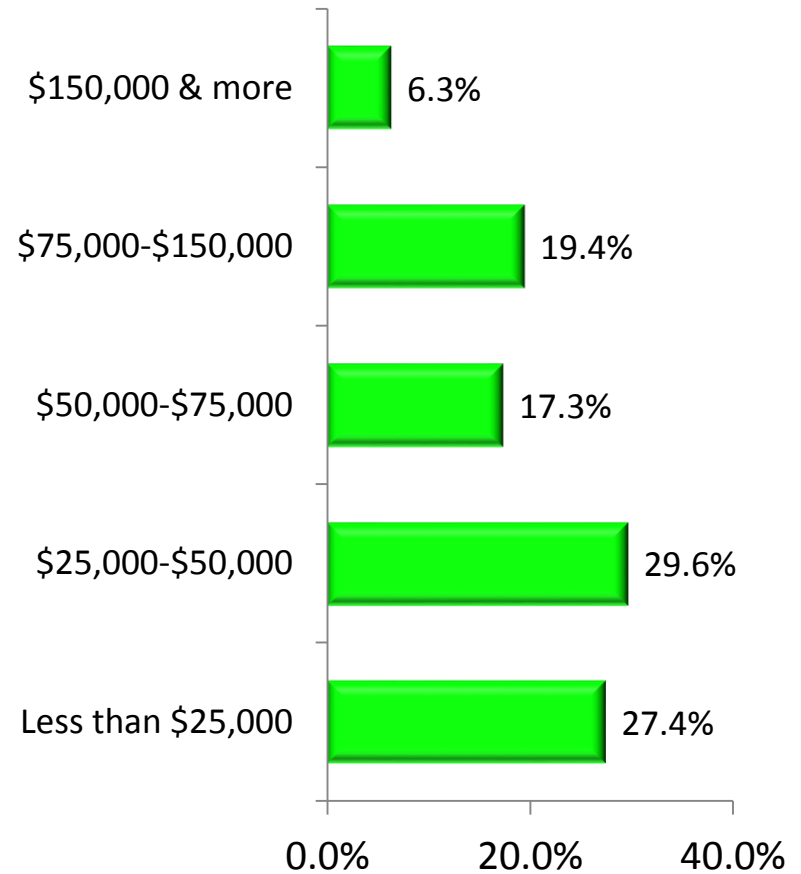


Employment status and personal earnings of NJ residents in the health care industry

Education Level



Personal Earnings

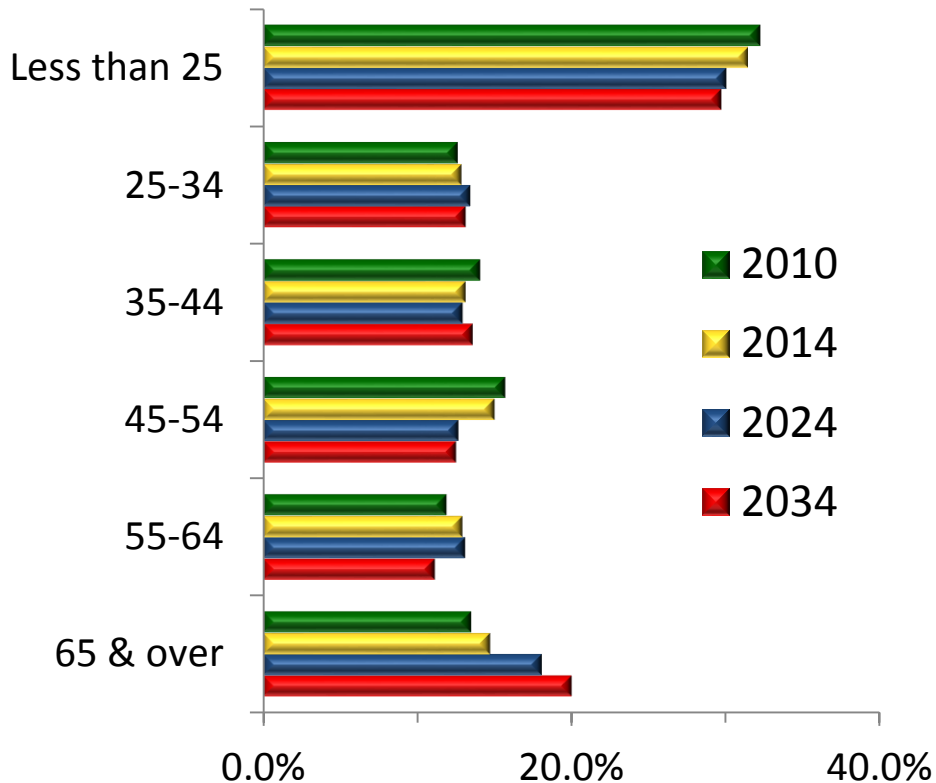


OUTLOOK



The aging population of Baby Boom generation will continue to increase demand for the health care industry

Population Estimates and Projections in New Jersey
2010-2034



The percentage of New Jersey residents aged 65 or over are projected to reach 20 percent by 2034

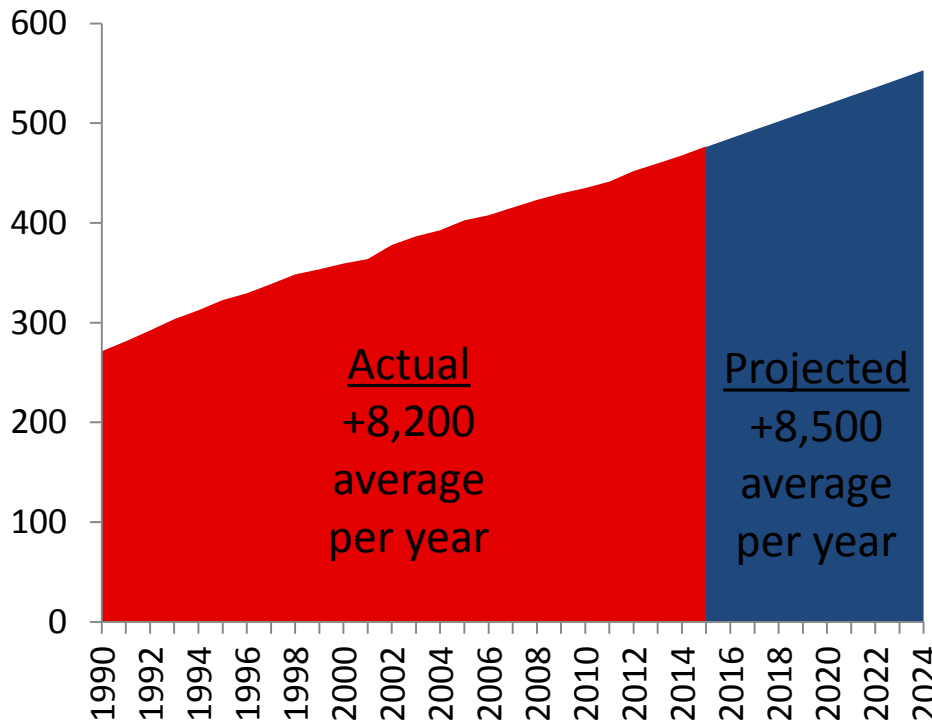
The working age (aged 25-64) population is projected to decline from 54 percent in 2010 to 50 percent in 2034

As the Baby Boomer generation continues to age, the demands they will place on the health care system will drive employment higher

This should result in large increases in employment for areas such as gerontology, physical therapy and residential and nursing home care

The health care industry has steadily gained employment over the last 25 years and will continue that trend through 2024

Actual and Projected Employment in Health Care (thousands):
New Jersey, 1990-2024



Employment is still growing, but rate of growth is slowing:

- Grew by 3 percent per year during 1990s
- Grew by 2 percent per year during 2000s
- *Projected to grow by 1.7 percent from 2014-2024*

There will be many opportunities for employment as the industry struggles to increase its workforce for growing demand while also replacing workers who will retire

The health care cluster is projected to add roughly 85,300 jobs, and account for more than 32 percent of net job growth in New Jersey from 2014-2024



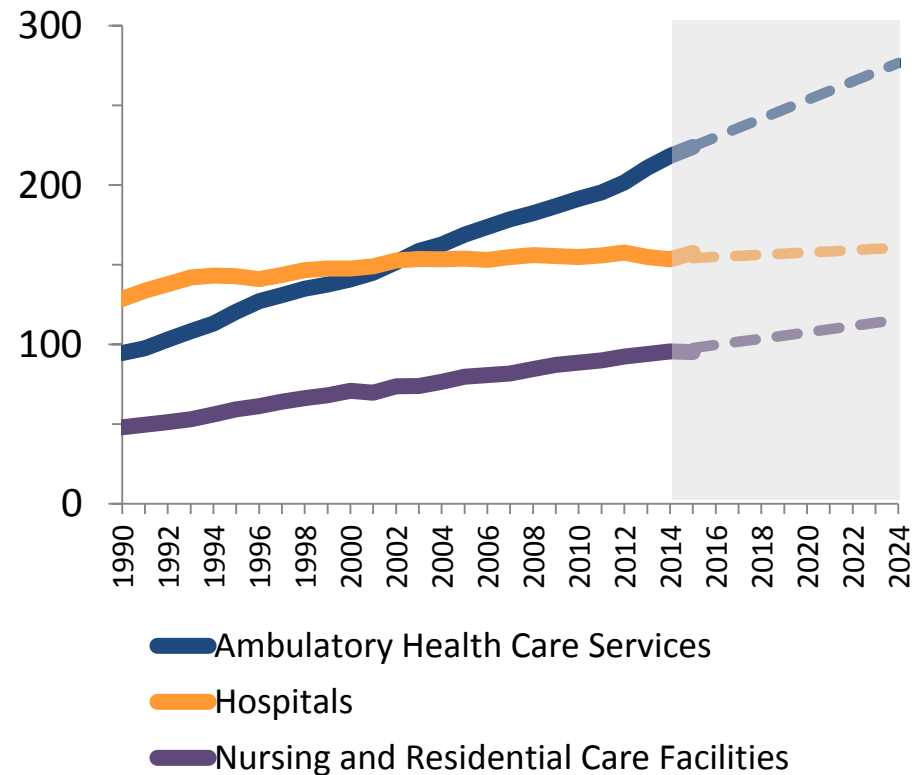
All three components of the health care industry are projected to experience employment gains through 2024

Ambulatory health care services became the largest component in 2003 and will continue to grow at a robust annual rate of 2.4 percent, adding roughly 58,200 jobs from 2014 through 2024

The hospital component is the slowest growing segment and is projected to add only 7,150 through 2024, at an annual rate of 0.5 percent

Nursing and residential care facilities has experienced steady and above average gains since 1990, and will continue on this trend as the aging Baby Boomer population increases demand for these services

Employment and Projected Estimates by Health Care Component
New Jersey: 1990-2024



Gray area denotes projected period from 2014-2024



STATE OF NEW JERSEY
DEPARTMENT OF LABOR AND
WORKFORCE DEVELOPMENT



NEW JERSEY DEPARTMENT OF
LWD
LABOR AND WORKFORCE DEVELOPMENT
nj.gov/labor

Source: Current Employment Statistics, New Jersey Industry and Occupational Projections
Prepared by: New Jersey Department of Labor and Workforce Development
January, 2018

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