



New Jersey's Health Care Cluster Spring 2015

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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 approximately \$34.8 billion to the Gross Domestic Product in 2012, roughly 7 percent of all output
- From 1990 through 2014, the health care sector has added 191,600 new jobs, while all other private sector employment has had a net increase of only 91,700 jobs
- Health care is the only industry that has added jobs in the state every year from 1990 through 2014 while increasing its share of jobholding from 7.5 percent in 1990 to 11.7 percent in 2014
- The outlook for health care employment is bright. From 2012 through 2022, it is projected that nearly 89,100 jobs will be added, an annual increase of 1.8 percent
- Health care employers paid more than \$23.3 billion in total wages in 2013, or about 12.2 percent of all wages paid

Overview



There are roughly 21,460 establishments employing nearly 442,900 people of all ages, genders, races, and educational backgrounds in New Jersey in 2013. 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, aged 35-54, and possesses at least some postsecondary education. The workforce is more diverse than average, and does not currently face the magnitude of unemployment as is felt in some other industries.

Industry Analysis

Health Care Cluster

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

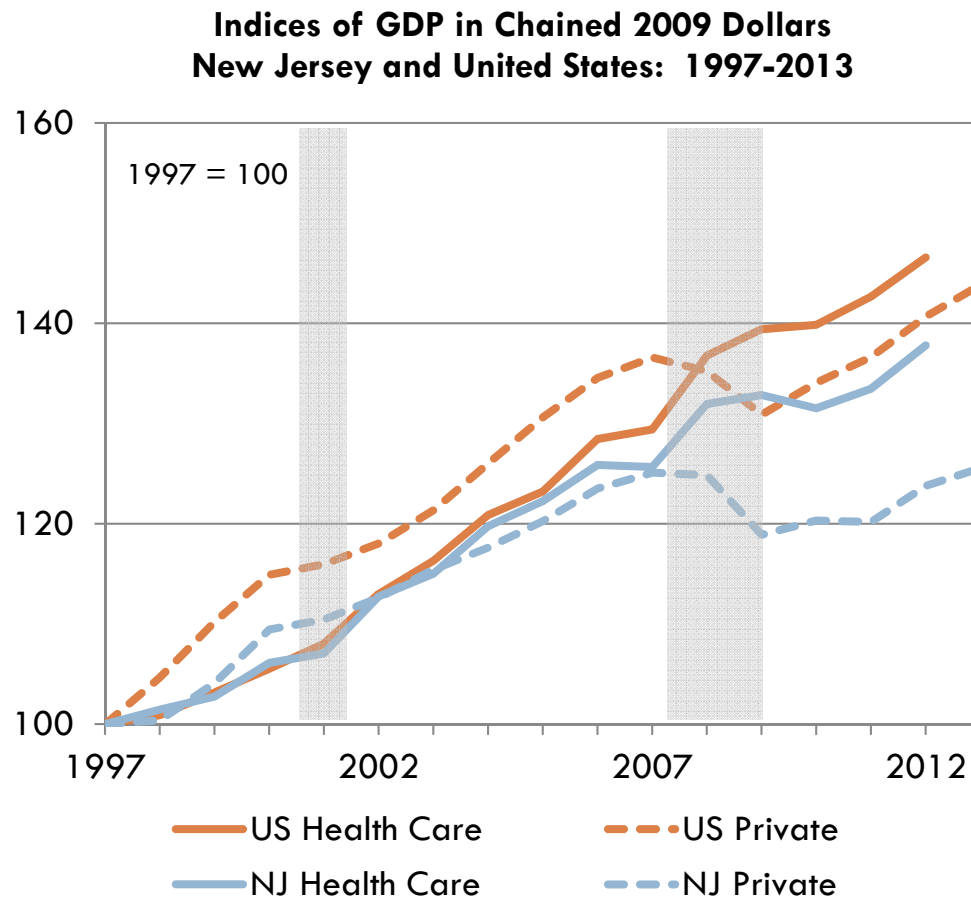
Hospitals

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

Nursing and Residential Care Services

- Nursing Care Facilities
- Residential Mental Retardation Facility
- 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



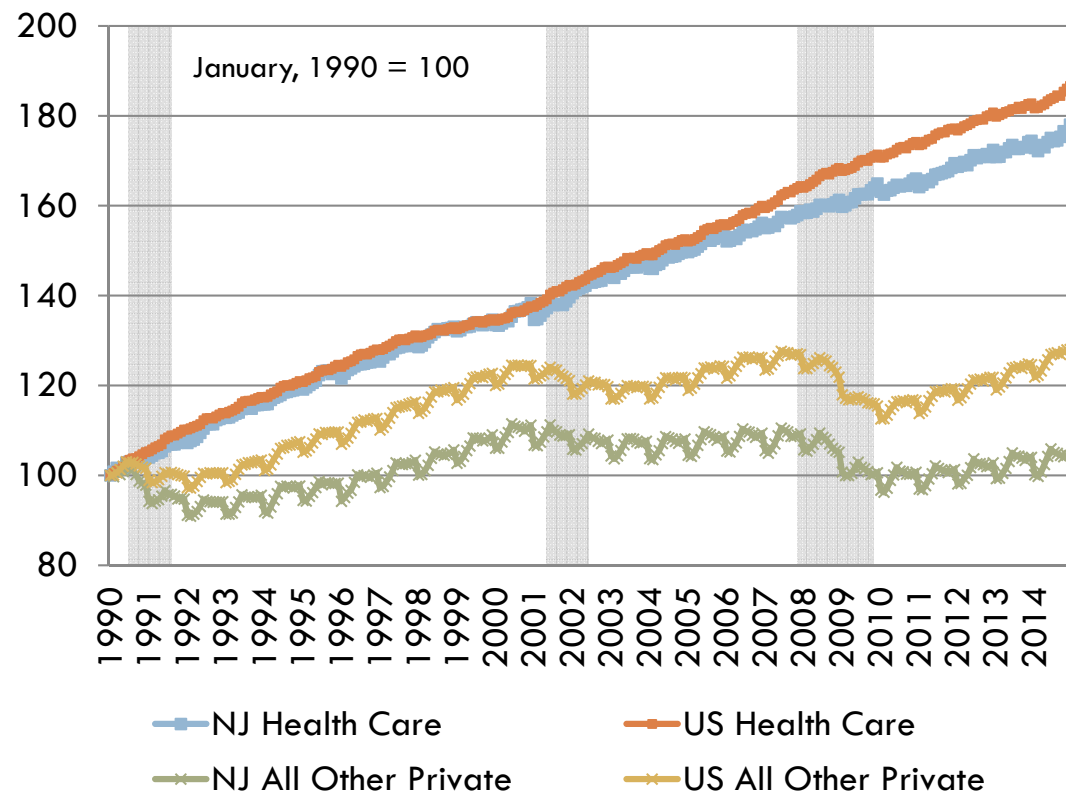
Output generated from the health care industry in New Jersey has increased steadily from roughly \$25 billion in 1997 to nearly \$35 billion in 2013

For the first time, GDP in the health care industry in the United States exceeded \$1 trillion in 2013

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

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: 1990-2014**



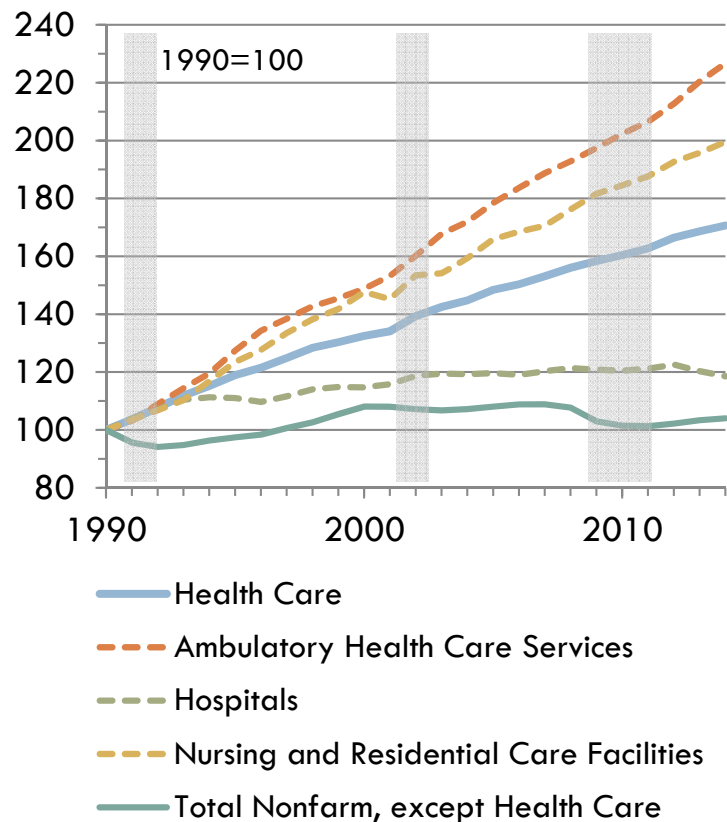
New Jersey has followed the national trend very closely, but starting in 2005 the nation pulled ahead in terms of faster growth

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 2014, New Jersey has added 103,500 new health care jobs while the rest of the private sector has lost approximately 167,000

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: 1990-2014**



From 1990 through 2014, the health care sector has added 191,600 new jobs, while all other industries combined have had a net gain of only 135,500

Employment in Ambulatory Health Care Services more than doubled over the last 24 years

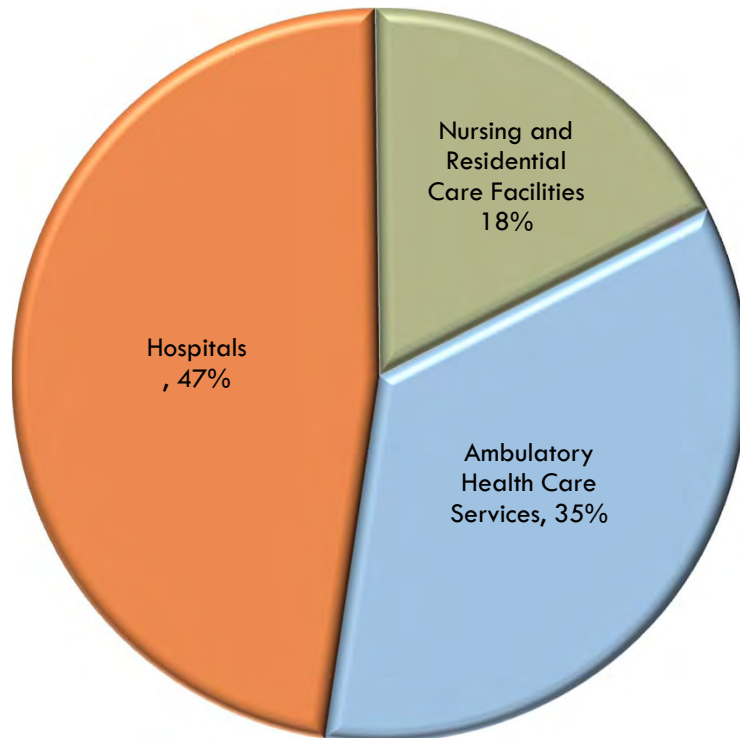
Employment in Nursing and Residential Care Facilities has now doubled from 1990 to 2014

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

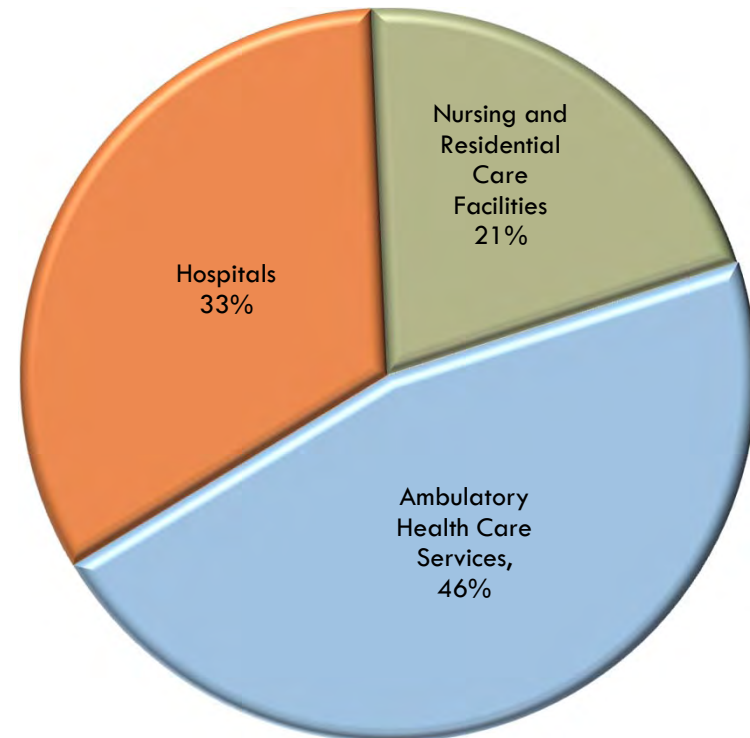
The landscape of health care delivery has changed dramatically over the past 24 years

Employment of Components as a Percentage of Total Health Care
New Jersey, 1990 & 2014

1990



2014



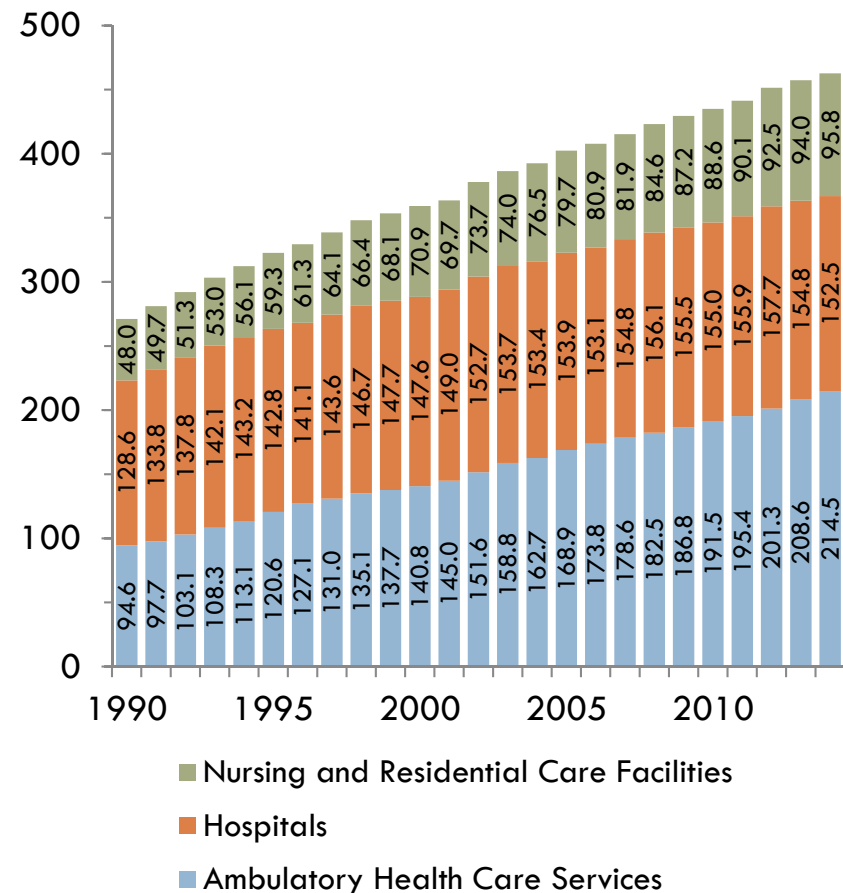
With employment surpassing 460,000, the health care sector accounted for 11.7% of all employment in the state in 2014, up from 7.5% in 1990

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 faster than four times the rate (2.9%) of Hospitals (0.7%) since 1990

Together, the three Health Care components have grown by 2.3 percent annually since 1990, compared to only 0.2 percent for all other total nonfarm employment

**Employment in Health Care Components in
Thousands
New Jersey, 1990-2014**

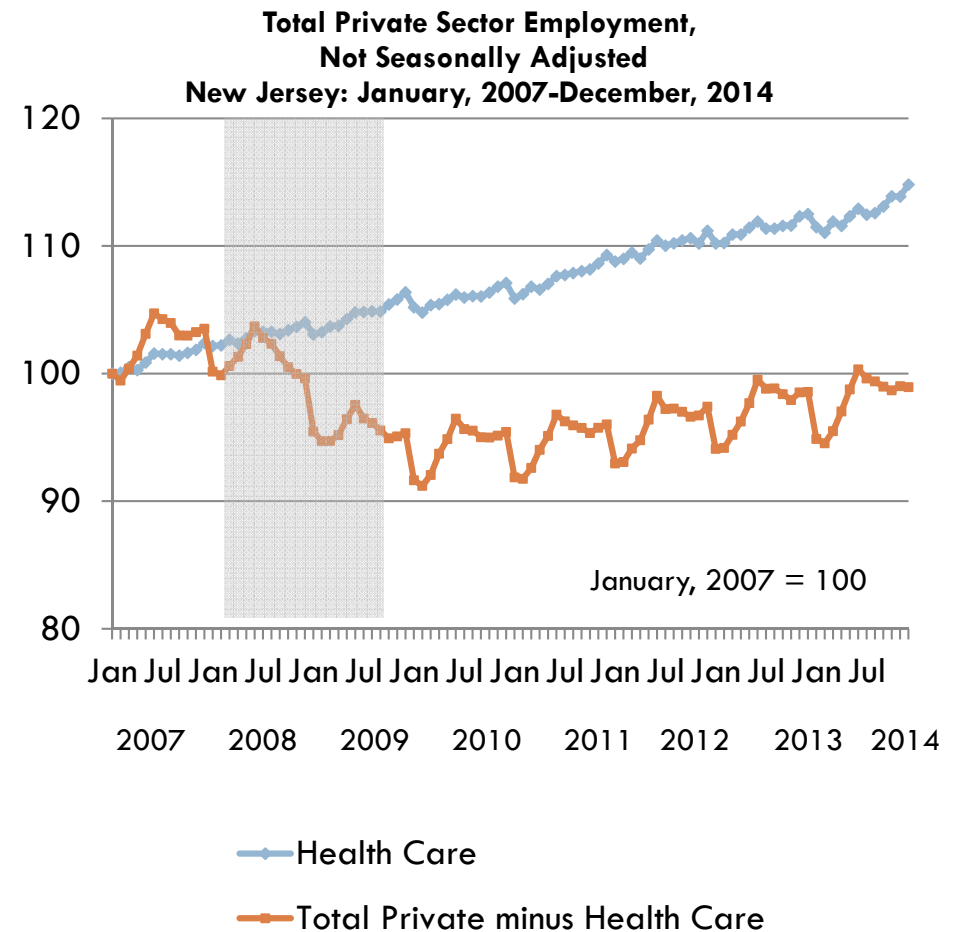


A closer view of the last few years highlights the stability of health care employment compared to the rest of the private sector

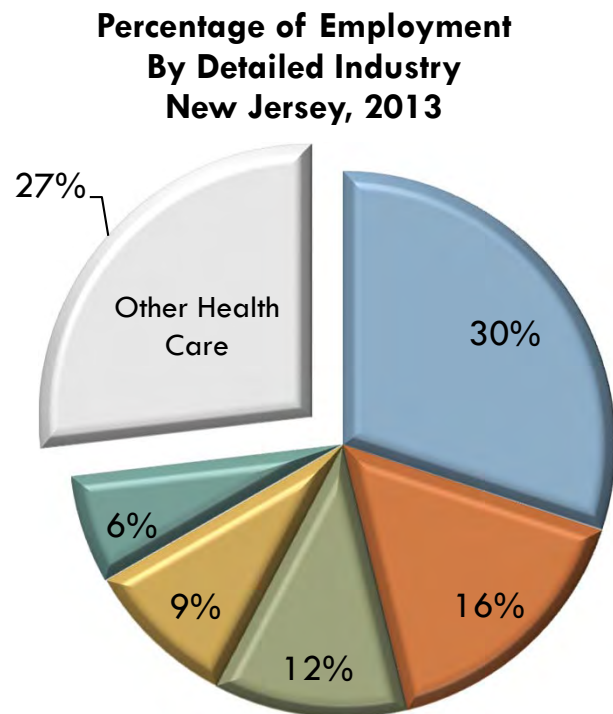
New Jersey's private sector employment reached its not seasonally adjusted historical peak of nearly 3.5 million jobs in June of 2007

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 added 41,000 new jobs, roughly the same as the remainder of the private sector



In 2013, nearly 75% of all health care employment in New Jersey is found in these top five industries



At the national level, these same five industries make up 73 percent of all health care employment

The health care cluster as a whole makes up 13.8 percent of all employment at the state level, up from 12.3 percent in 2008

Employment in general medical and surgical hospitals has declined in New Jersey and accounts for only 30.1 percent of all health care employment in 2013, down from 32.9 percent in 2008

- General Medical and Surgical Hospitals
- Nursing Care Facilities
- Offices of Dentists
- Offices of Physicians
- Home Health Care Services

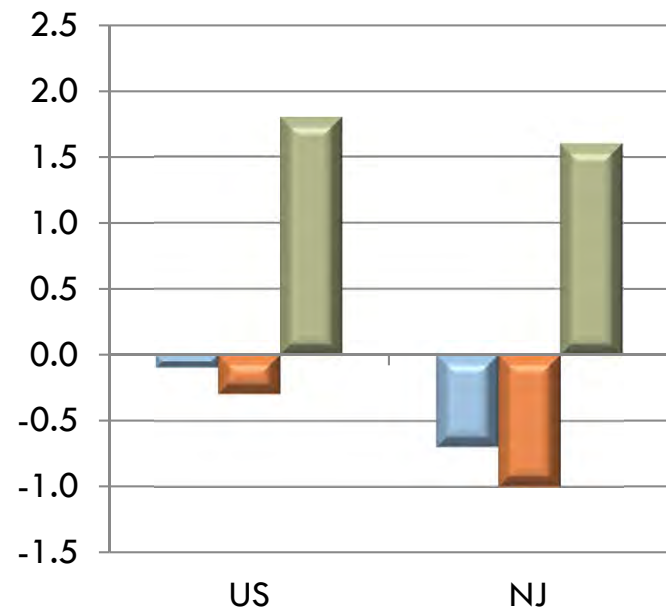
Over the last five years, employment in the health care cluster experienced robust growth of 1.8% nationally from 2008 through 2013, 1.6% in New Jersey

Home Health Care Services, Continuing Care Retirement Facilities, and Nursing Care Facilities together added nearly 16,000 workers from 2008 to 2013 as they attempted to keep with the demand for care from an aging Baby Boomer generation.

Nationally, these three industries added nearly 400,000 jobs over the five-year period.

Kidney Dialysis Centers and Freestanding Emergency Medical Centers were the fastest growing health care industries in New Jersey, growing annually by 9.2 and 7.1 percent, respectively

**Annual Percentage Change in Employment
New Jersey, 2008-2013**



- Total, Private Sector
- Private Sector minus Health Care
- Health Care

Narrative explaining bubble chart

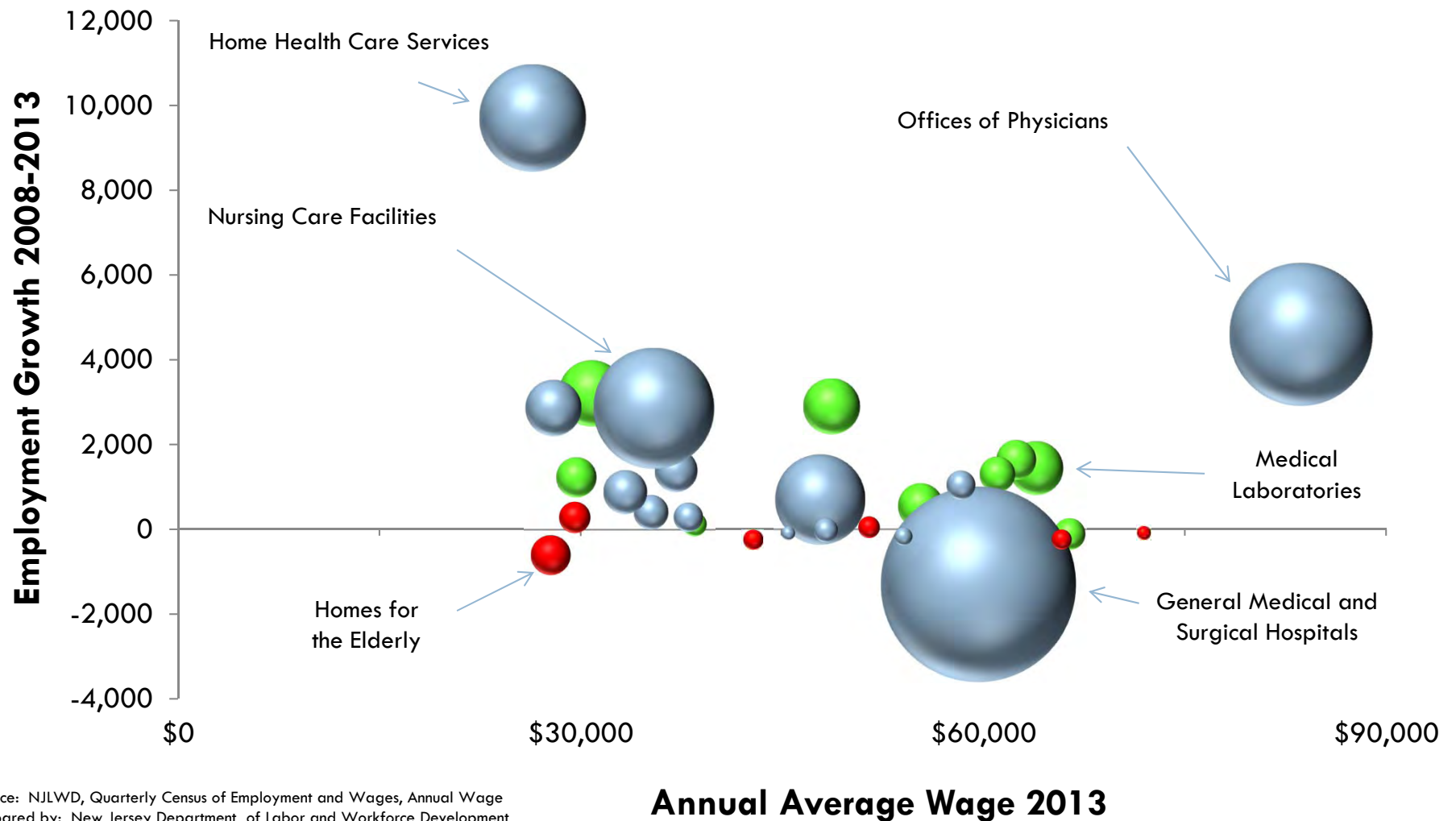
There are four elements of data depicted in the bubble chart on the next page:

1. Total 2013 employment is represented by the size of the bubble
2. Employment change from 2008-2013 is shown by the position on the Y-axis, or vertical position
3. Annual average wages in 2013 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= $LQ < 0.8$



Source: NJLWD, Quarterly Census of Employment and Wages, Annual Wage
Prepared by: New Jersey Department of Labor and Workforce Development
April, 2015

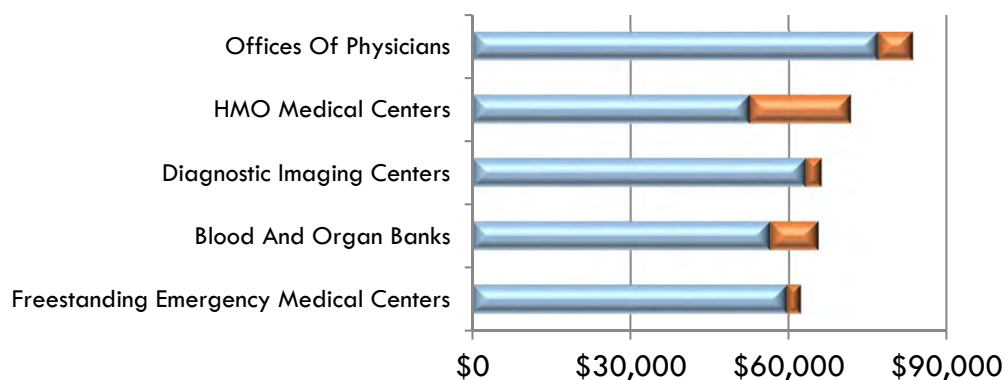
The annual average wage in New Jersey in the health care sector in 2013 was \$52,690, up from \$50,440 in 2008, an increase of \$2,250 or 0.9% per year

Nationally, the Health Care industry paid an annual average wage of \$50,060 in 2013, up 1.8% per year from \$45,720 in 2008

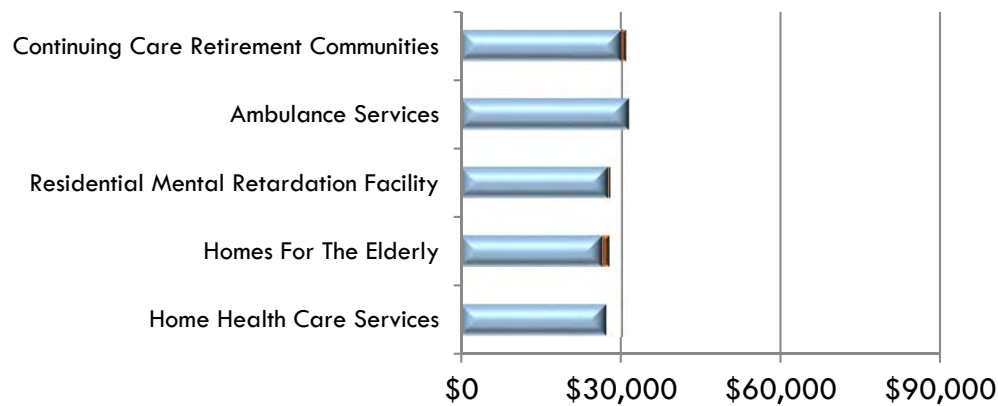
Generally, the highest paying industries provide outpatient services and non-emergency care, like diagnostic imaging and offices of doctors or other specialists

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

Highest Five Annual Average Wages, NJ, 2013

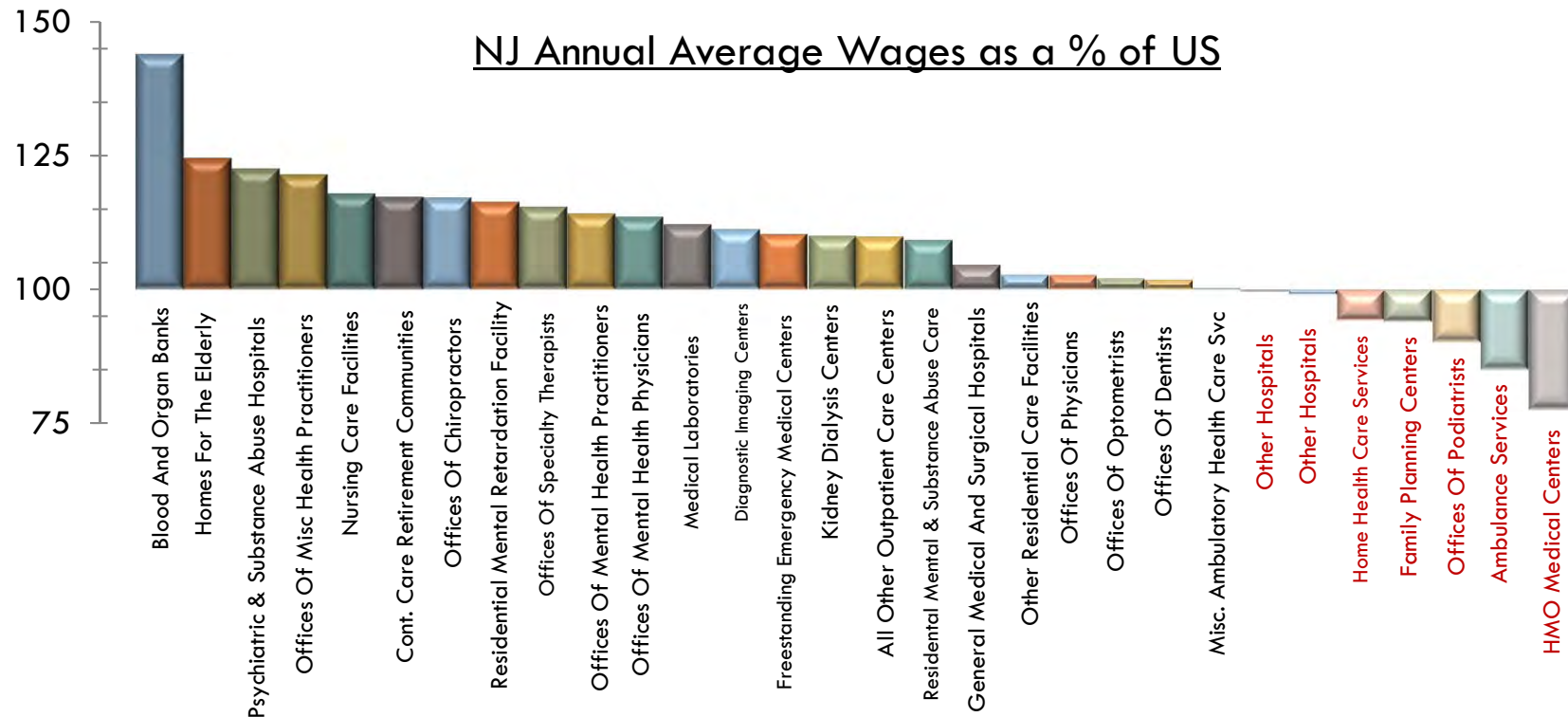


Lowest Five Annual Average Wages, NJ, 2013



■ 2008 Annual Wage ■ Growth 2008-2013

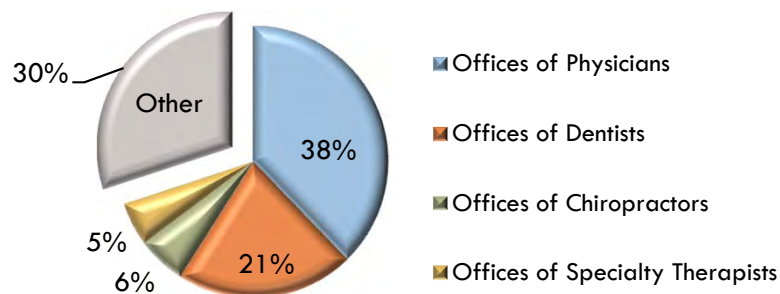
23 out of 30 health care industries in New Jersey have a higher annual average wage than the nation. Overall, the sector paid 5.3% more in New Jersey in 2013 than nationally



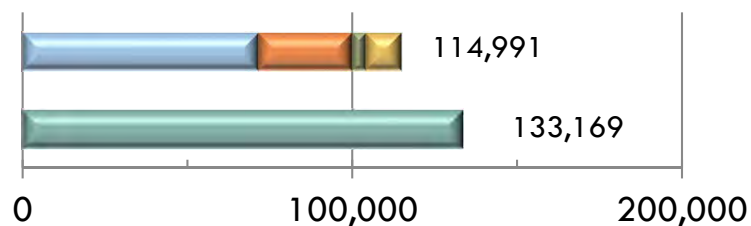
The wage disparity has decreased in 20 of the 30 industries since 2008, when the sector was paid an average of 10.3% more in New Jersey

There were 21,458 health care establishments in New Jersey in 2013, employing 442,900 people

70% of all Health Care establishments fall into these four industries...



...yet the 77 General Medical and Surgical Hospitals (<1% of establishments) employed 16% more in 2013



2013 Employment

From 2008 to 2013, New Jersey had a net increase of 830 health care establishments, an increase of 0.8 percent annually (1.6 percent nationally)

Reflecting a nationwide trend from 2008 to 2013, the number of Kidney and Dialysis Centers in New Jersey increased from 83 to 130

General Medical and Surgical Hospitals averaged nearly 1,375 employees per establishment in 2013

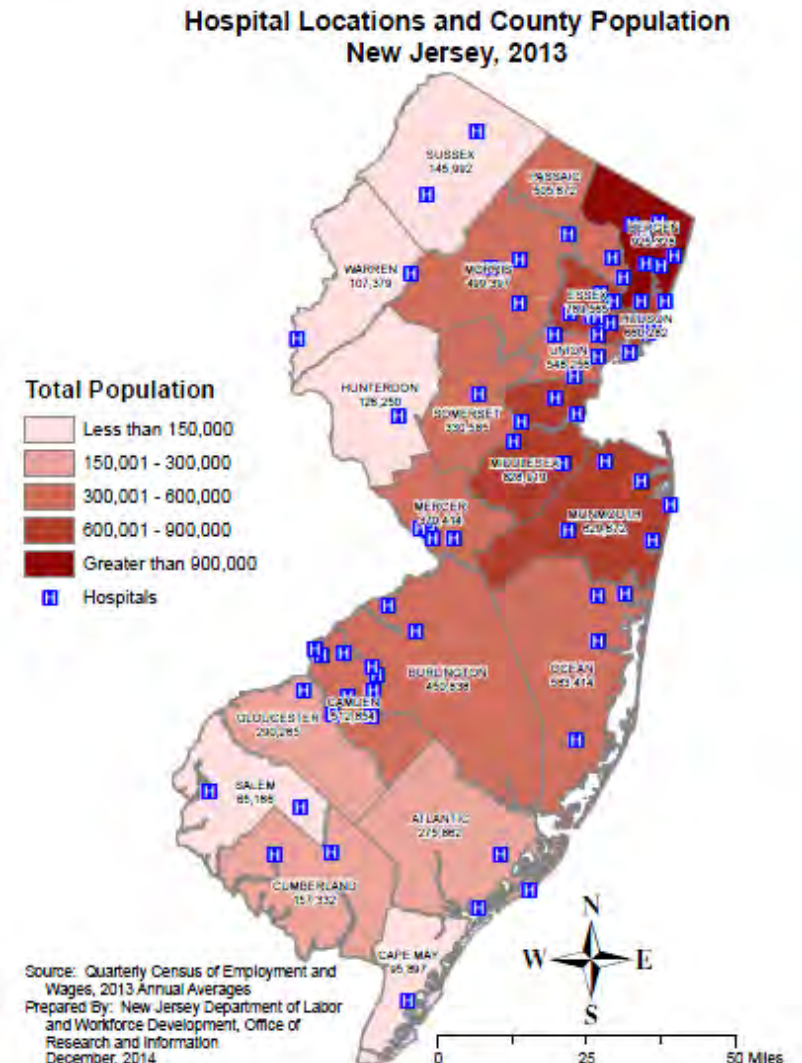
Geographic Analysis

Health Care Cluster

There are 77 hospitals in New Jersey that serve the state's population of more than 8.8 million people

Number of Hospitals by County					
Camden	8	Burlington	4	Passaic	2
Essex	8	Morris	4	Salem	2
Bergen	6	Ocean	4	Sussex	2
Hudson	6	Atlantic	3	Warren	2
Middlesex	6	Union	3	Cape May	1
Mercer	5	Cumberland	2	Hunterdon	1
Monmouth	5	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



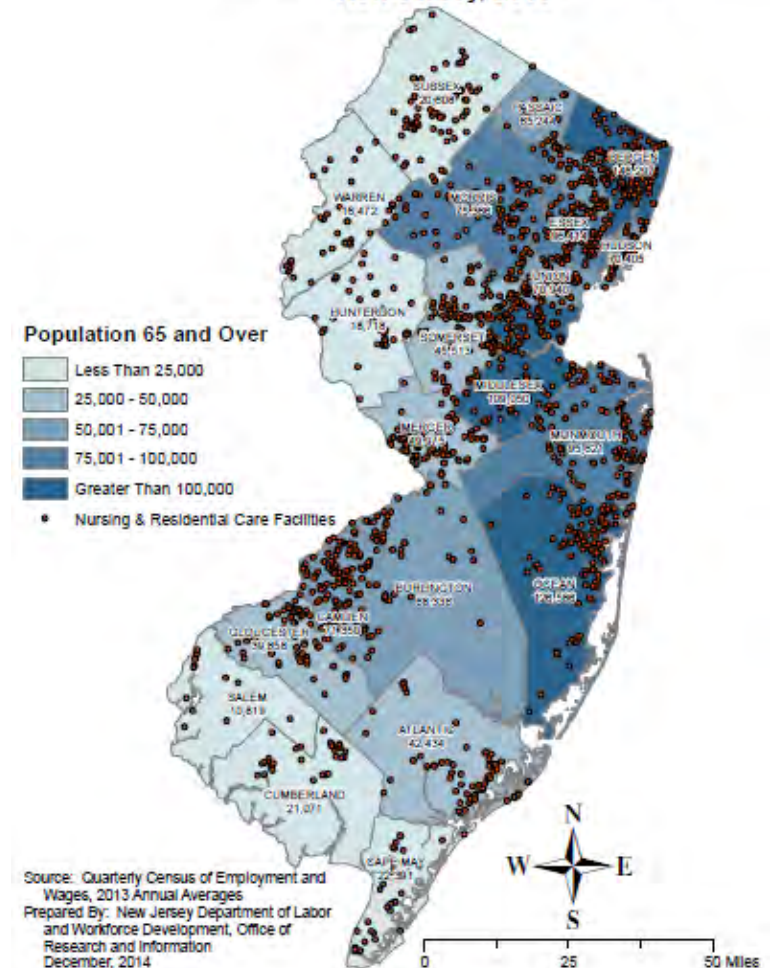
New Jersey's aging population has created increased demand for health care service, especially in the areas of nursing and residential care

Percentage of County Population Aged 65 and Over

Cape May	23.3%	Burlington	15.2%	Mercer	13.5%
Ocean	21.7%	Morris	15.1%	Cumberland	13.4%
Salem	16.6%	Hunterdon	14.8%	Middlesex	13.2%
Bergen	15.8%	Sussex	14.1%	Union	12.9%
Atlantic	15.4%	Camden	13.9%	Passaic	12.9%
Warren	15.3%	Somerset	13.8%	Essex	12.2%
Monmouth	15.2%	Gloucester	13.7%	Hudson	10.7%

Nursing and residential care facilities are well positioned throughout the state, providing coverage to even the more remote 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, 2013**

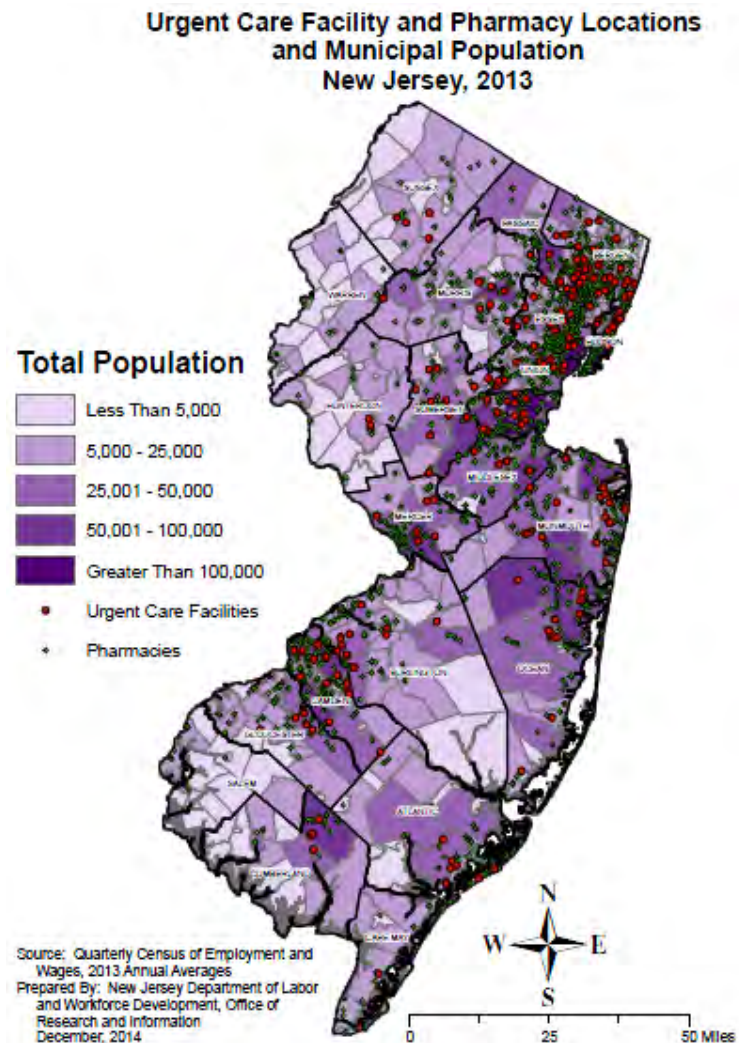


Urgent care facilities and pharmacies provide support to the health care system and their proximity can be a large convenience to residents

The number of urgent care facilities (aka. freestanding emergency medical centers) has nearly doubled from 139 in 2004 to 227 in 2013. 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 2,710 in 2004 to 5,560 in 2014 as their popularity continues to spread

The number of pharmacies has increased by nearly 40 percent from 2004 to 2013 and most New Jersey residents now live within a short drive of the nearest location



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

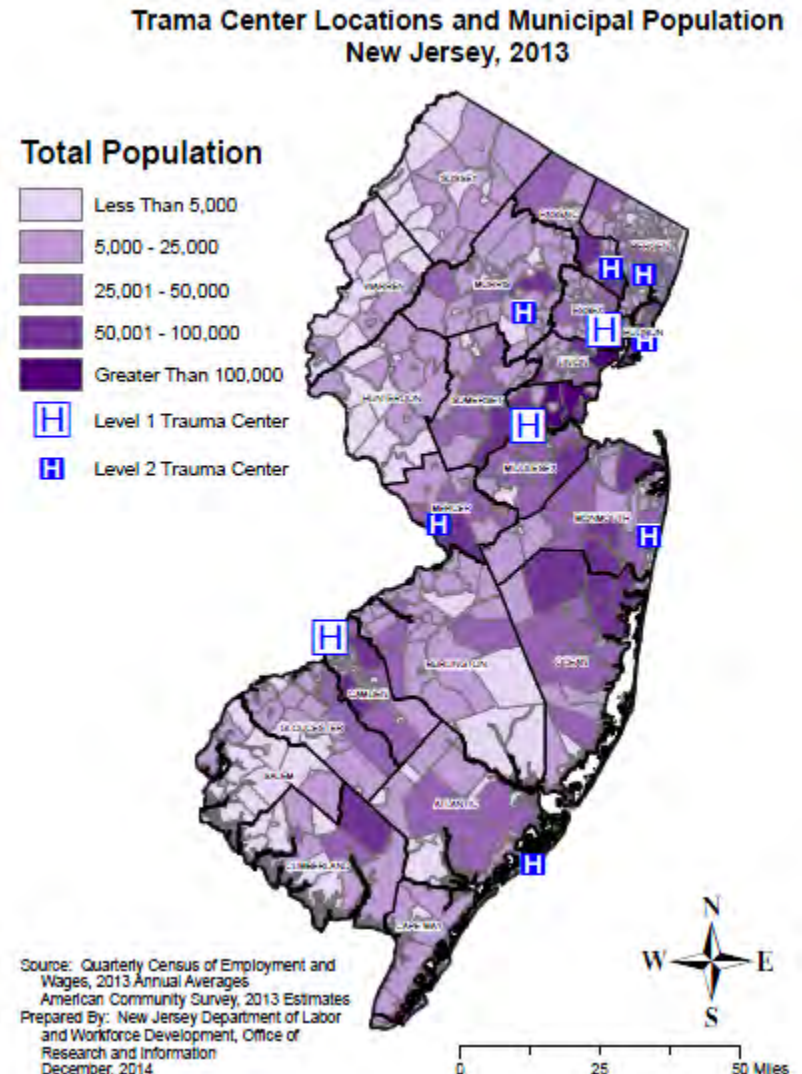
Trauma is any physical injury caused by violence or other forces. The three types of serious trauma are penetrating, blunt, or burns. Trauma centers are specially equipped hospital where the immediate availability of specialized personnel, equipment and capabilities is guaranteed 24 hours a day

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

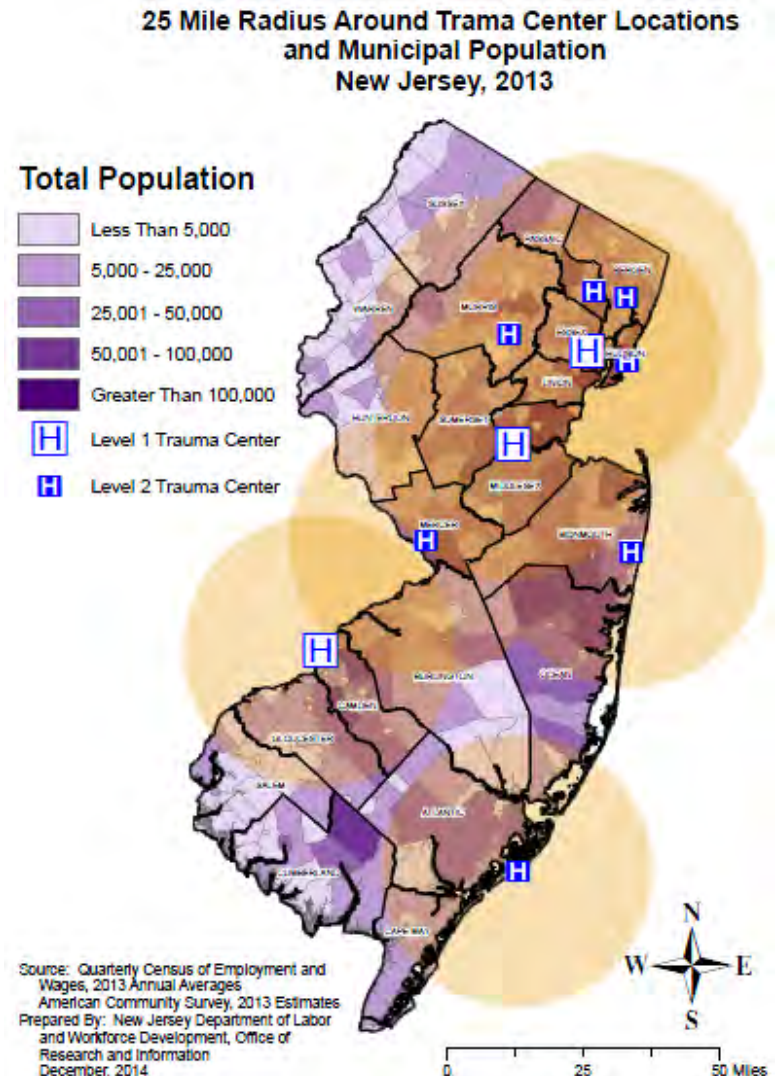


This map shows the general proximity of each of the ten trauma centers to the population of the state's municipalities

78 percent of the state's population resides in municipalities within 25 miles of a level 1 trauma center, and 94 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

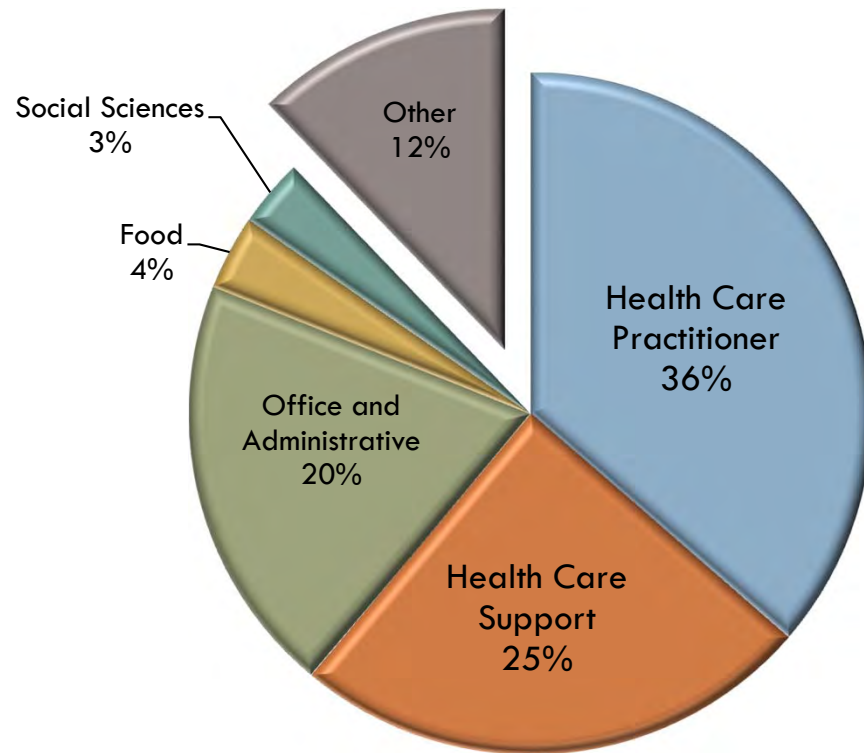


Occupational Analysis

Health Care Cluster

Roughly three out of five workers in the health care industry are directly involved with patient care in 2013

Breakdown of Major Occupational Groups within Health Care Industry: New Jersey, 2013



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.

Food and social services make up a relatively small, but integral portion of the workforce

The bulk of the remainder of the workforce is comprised of management and other service occupations

The top twenty occupations found in health care make up almost 70 percent of all employment in the industry

Occupation	2013 Employment	Share of Industry	Average Salary	Minimum Educational Requirement
Total, All Health Care Occupations	468,200	100.0%	\$53,830	
Top 20 Occupations	319,388	68.2%	\$57,390	
Registered Nurses	68,755	14.7%	\$77,920	Associate's degree
Nursing Assistants	46,605	10.0%	\$27,890	Postsecondary non-degree award
Receptionists and Information Clerks	31,815	6.8%	\$29,100	High school diploma or equivalent
Home Health Aides	25,516	5.4%	\$22,680	Less than high school
Physicians and Surgeons	20,212	4.3%	\$201,110	Doctoral or professional degree
Medical Assistants	14,125	3.0%	\$32,360	High school diploma or equivalent
Medical Secretaries	13,538	2.9%	\$39,780	High school diploma or equivalent
Licensed Practical and Licensed Vocational Nurses	12,218	2.6%	\$51,780	Postsecondary non-degree award
Food Servers, Nonrestaurant	10,981	2.3%	\$22,590	Less than high school
Billing and Posting Clerks and Machine Operators	9,556	2.0%	\$38,900	High school diploma or equivalent
Dental Assistants	8,946	1.9%	\$39,200	Postsecondary non-degree award
Maids and Housekeeping Cleaners	8,655	1.8%	\$24,500	Less than high school
Supervisors of Office and Administrative Support Workers	8,087	1.7%	\$53,090	High school diploma or equivalent
Medical and Health Services Managers	7,365	1.6%	\$112,830	Bachelor's degree
Physical Therapists	6,145	1.3%	\$90,900	Doctoral or professional degree
Emergency Medical Technicians and Paramedics	5,801	1.2%	\$34,240	Postsecondary non-degree award
Radiologic Technologists and Technicians	5,739	1.2%	\$64,740	Associate's degree
Dental Hygienists	5,647	1.2%	\$80,480	Associate's degree
File Clerks	4,874	1.0%	\$27,160	High school diploma or equivalent
Medical and Clinical Laboratory Technologists	4,808	1.0%	\$65,930	Bachelor's degree



Health care practitioners



Health care support



Office/Administrative support

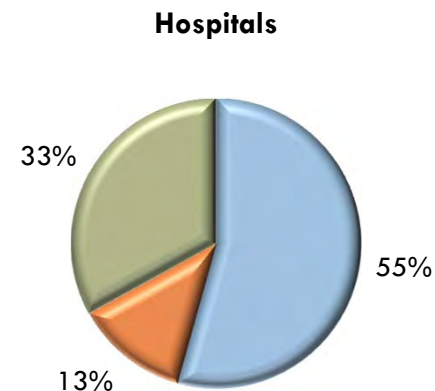
Skills, Knowledge and Abilities most important to the top 20 occupations found in health care

Skills	Knowledge	Abilities
Active listening Speaking Social perceptiveness Service orientation Reading comprehension Critical thinking Monitoring Coordination Time management Writing	Customer and personal service English language Psychology Clerical Medicine and dentistry Education and training Administration and management Mathematics Public safety and security Computers and electronics	Oral comprehension Oral expression Speech clarity Problem sensitivity Speech recognition Written comprehension Near vision Deductive reasoning Information ordering Written expression

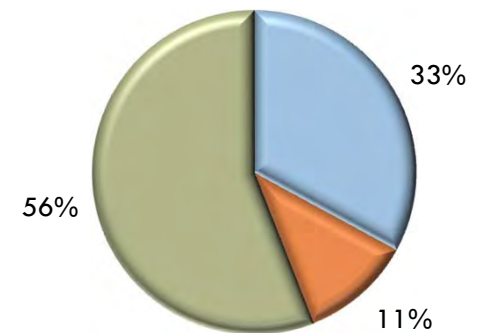
****In addition to industry specific SKAs, effective communication is key****

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

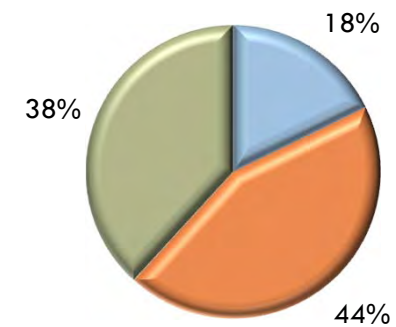
Minimum Education Requirements	2013 Employment	% of Total
Total Health Care Occupations	468,200	100.0%
Total High Requirements	176,593	37.7%
Doctoral or professional degree	36,097	7.7%
Master's degree	14,485	3.1%
Bachelor's degree	31,962	6.8%
Associate's degree	94,049	20.1%
Total Moderate Requirements	85,480	18.3%
Some college, no degree	623	0.1%
Postsecondary non-degree award	84,857	18.1%
Total Low Requirements	207,983	44.4%
High school diploma or equivalent	147,081	31.4%
Less than high school	60,902	13.0%



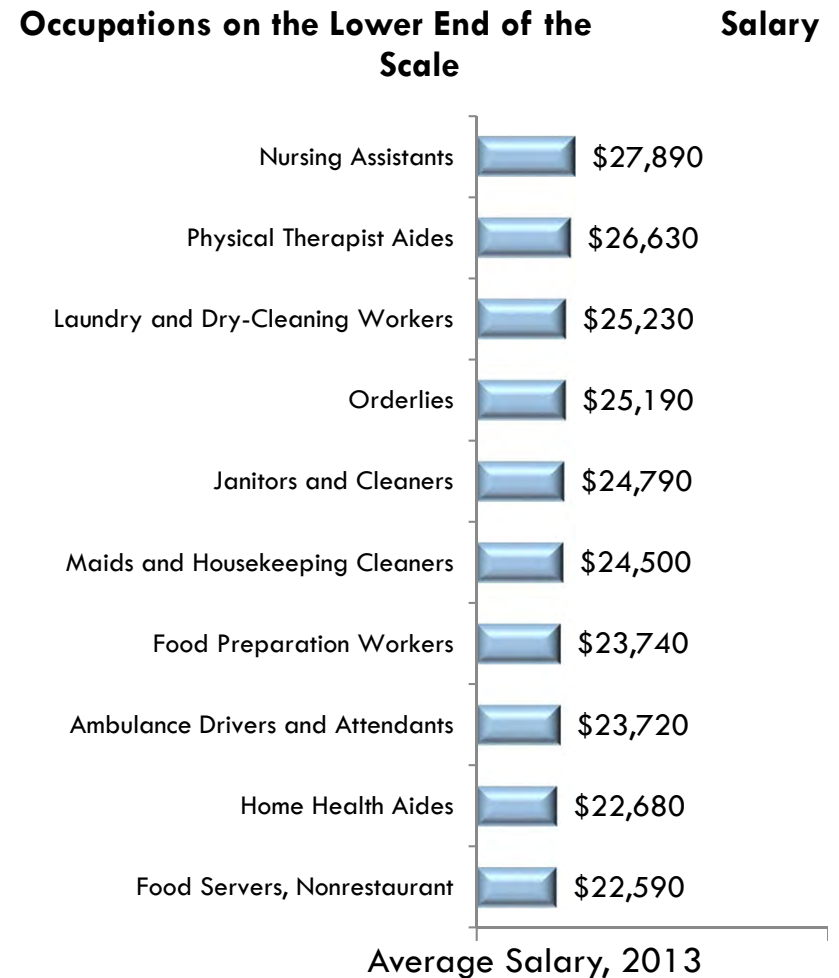
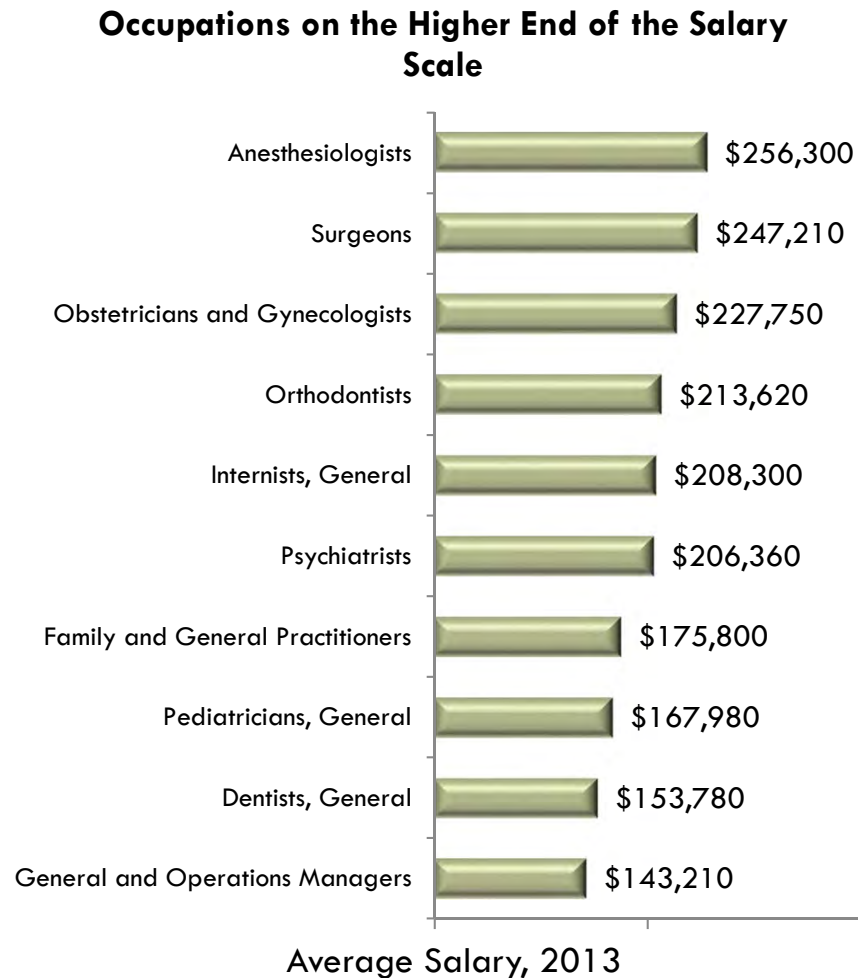
Ambulatory Health Care Services



Nursing and Residential Care Facilities



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

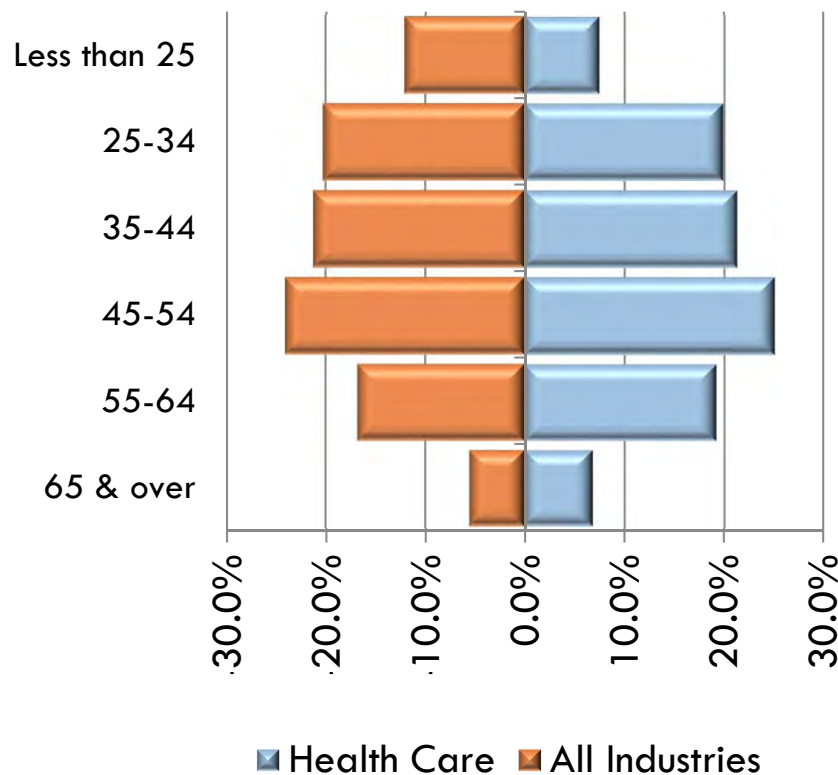


Demographic Profile

Health Care Cluster

Comparison by age group of the health care cluster and total nonfarm employment of New Jersey residents

**Age Breakdown of Workers in Health Care Industry
New Jersey, 2013**



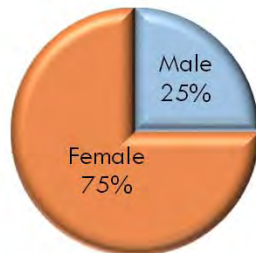
The workforce of the health care industry is older than average with about 51 percent aged 45 and up compared to only 46 percent overall

The largest disparity among age cohorts occurs in the youngest group, where only 7 percent of the health care workforce is 25 years old or younger

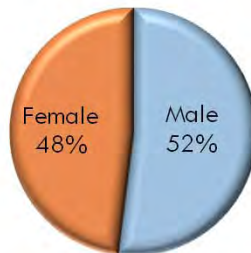
Nearly 7 percent of the current health care workforce is aged 65 and older

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

Health Care



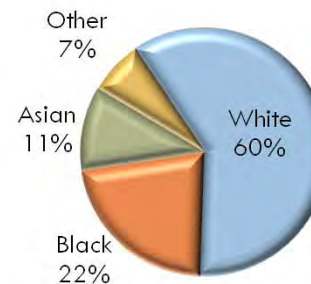
All Industries



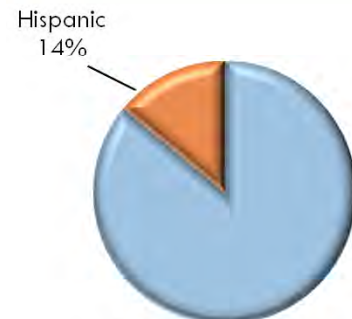
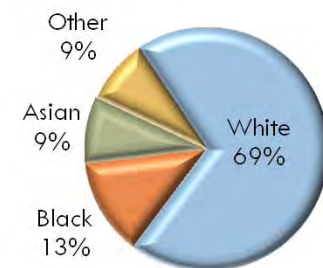
Females outnumber males by a 3 to 1 margin in the health care workforce

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

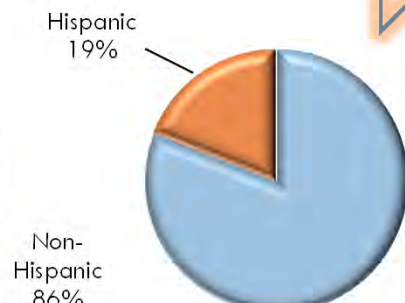
Health Care



All Industries



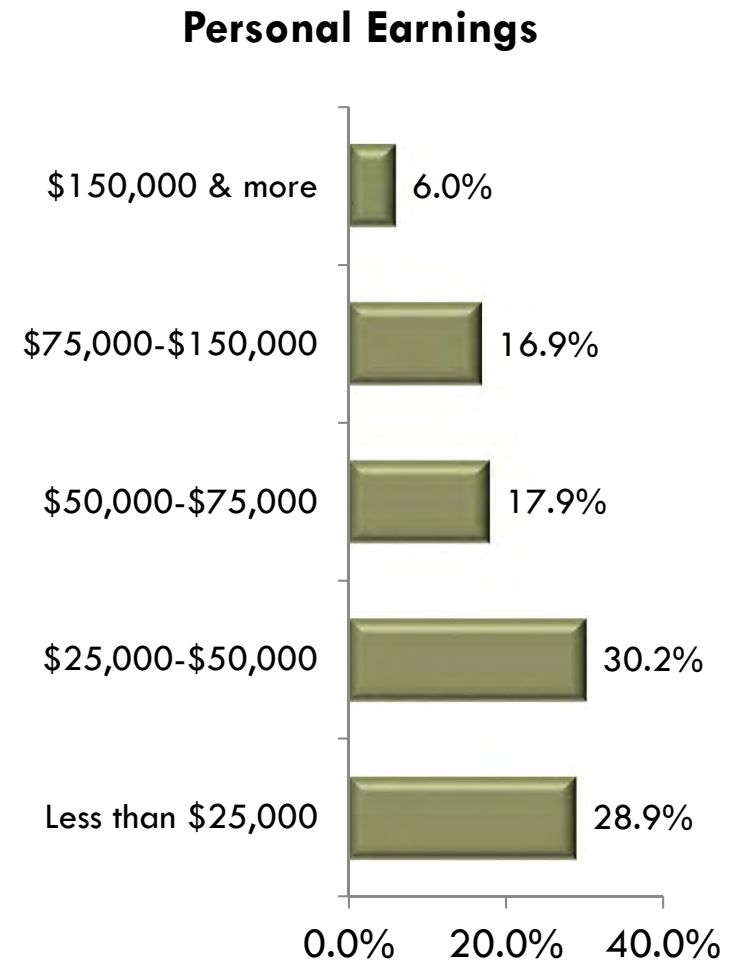
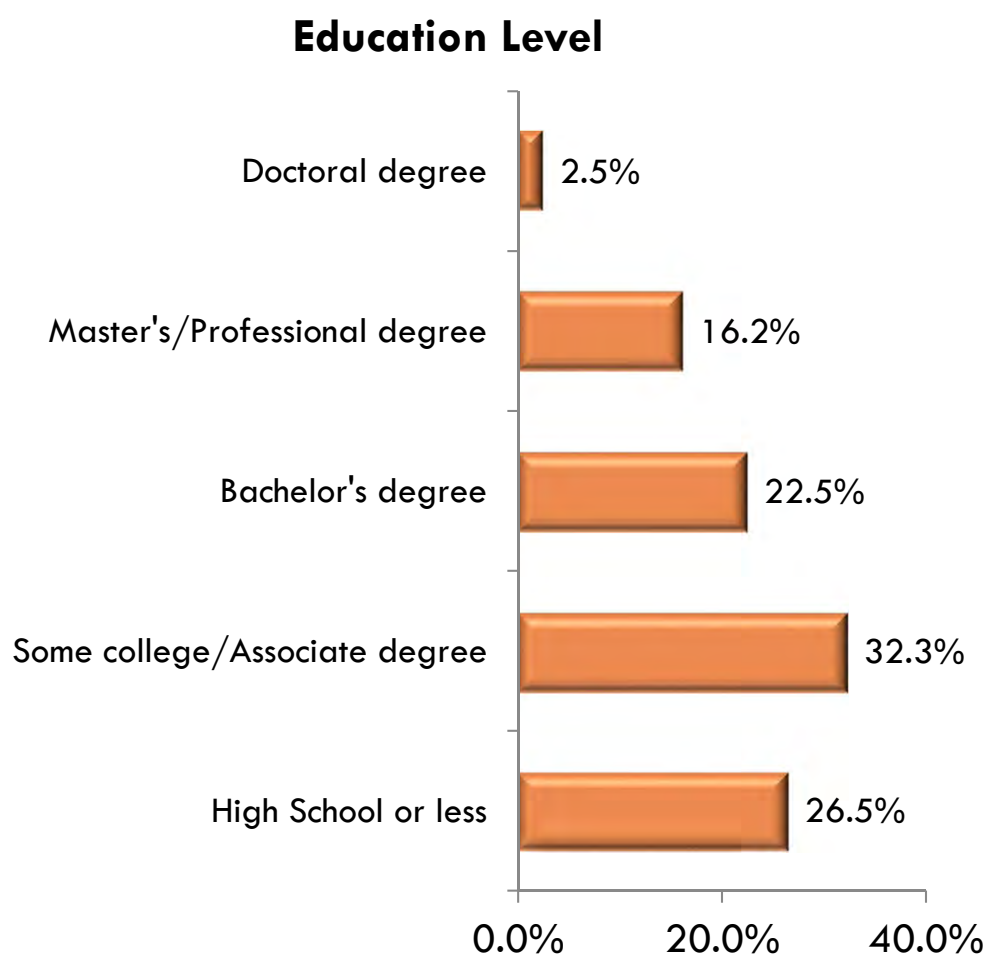
Health Care



All Industries

The workforce has just slightly fewer Hispanics than average

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

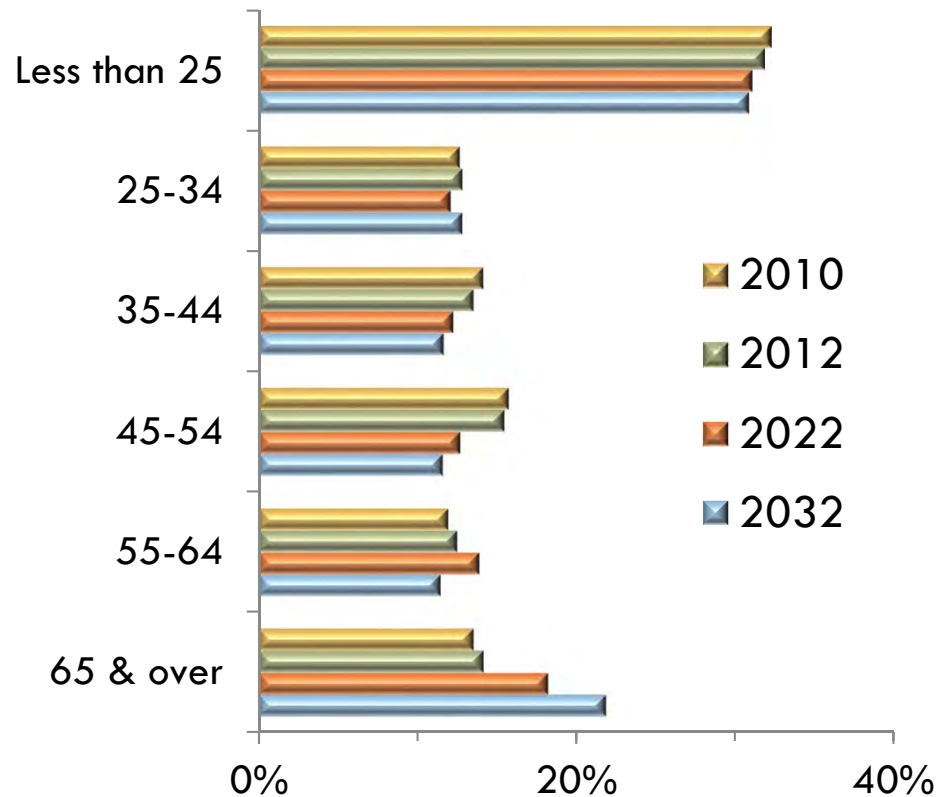


Outlook

Health Care Cluster

The first of two key drivers that will increase the demand for health care is the aging population in New Jersey

**Population Estimates and Projections in New Jersey
2010-2032**



The percentage of New Jersey residents aged 65 or over are projected to reach 22 percent by 2032

The working age (aged 25-64) population is projected to decline from 54 percent in 2010 to 47 percent in 2032

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

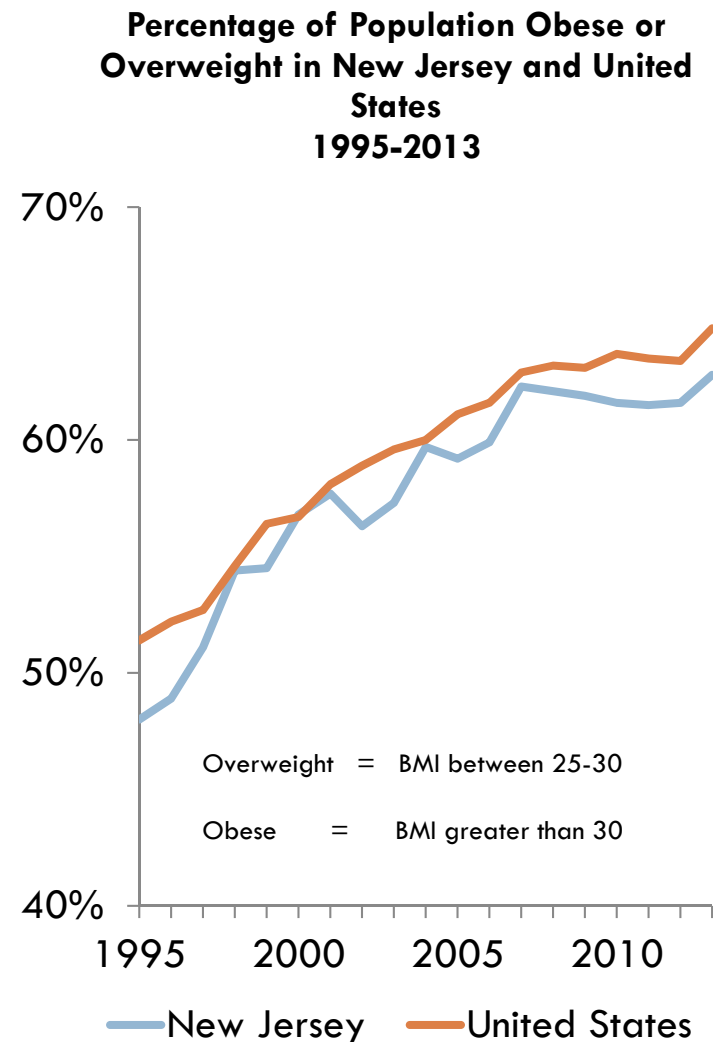
The second key driver is the population's ongoing struggle with weight and obesity

Although New Jersey continues to lag the nation in terms of the percentage of people who are overweight or obese, the trend line shows that the percentage of the population in “at risk” groups has increased by 31 percent from 1995 to 2013

A closer view of the data shows that New Jersey's percentage of overweight has increased only slightly while the percentage of the obese has nearly doubled to 26 percent in 2013

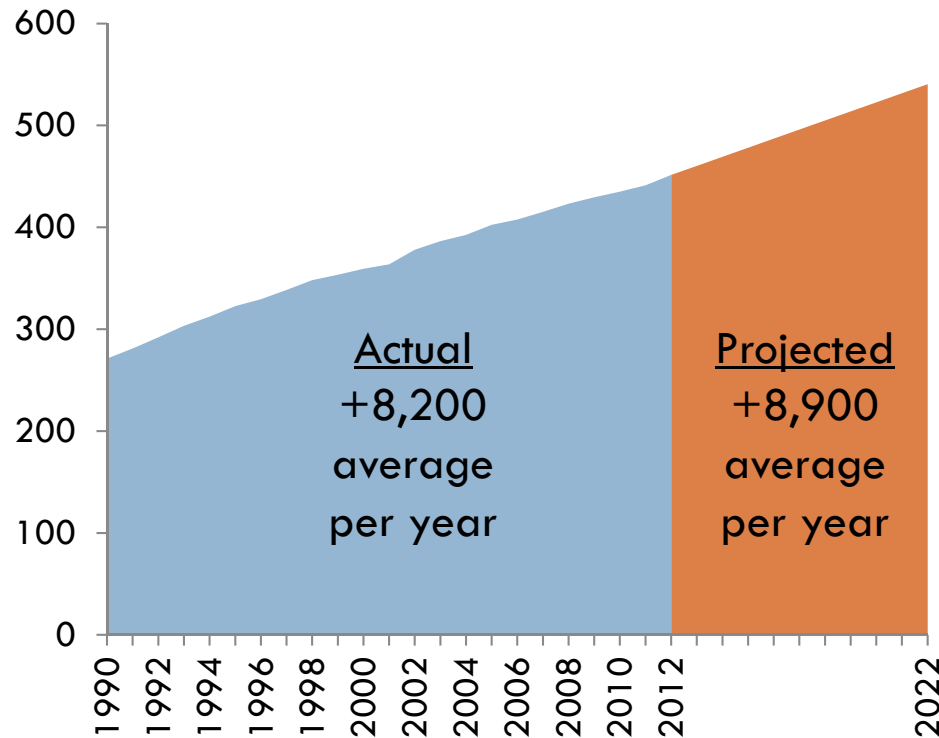
Employment opportunities in nutrition, physical therapy and cardiovascular disease should be robust as the state and the nation attempt to manage the obesity epidemic

Source: Center for Disease Control, Behavioral Risk Factor Surveillance System
Prepared by: New Jersey Department of Labor and Workforce Development
April, 2015



The health care industry has steadily gained employment over the last 20 years and will continue that trend through 2022

**Actual and Projected Employment in Health Care (thousands):
New Jersey, 1990-2022**



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 1.8 percent from 2012-2022*

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 89,000 jobs, and account for more than 29 percent of net job growth in New Jersey from 2012-2022

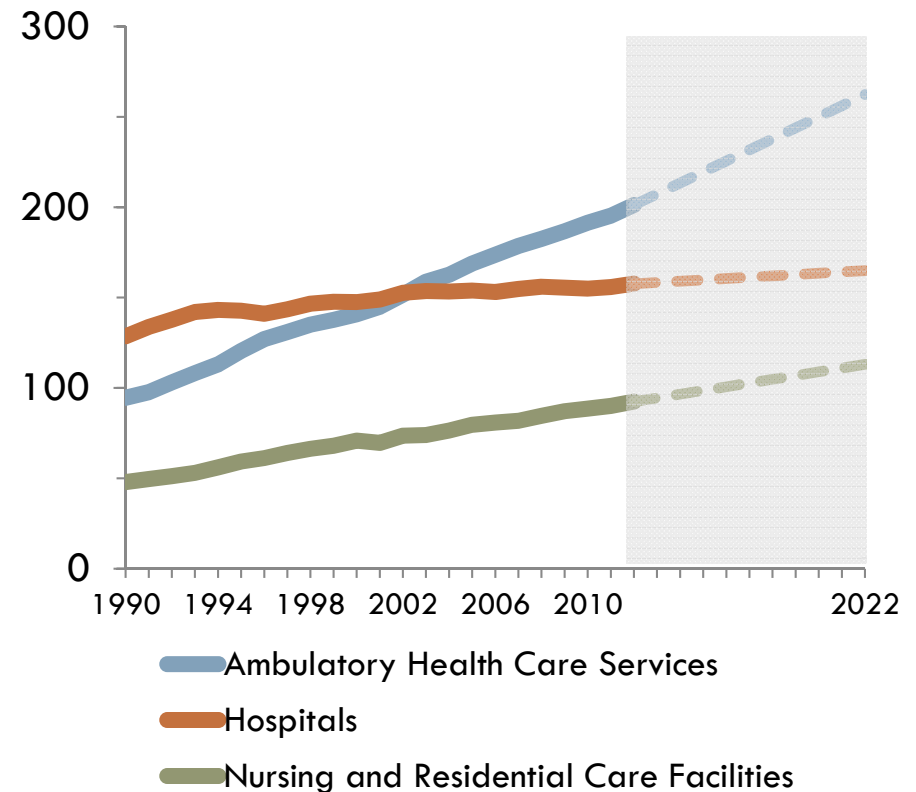
All three components of the health care industry are projected to experience employment gains through 2022

Ambulatory health care services became the largest component in 2003 and will continue to grow at a robust annual rate of 2.7 percent, adding roughly 61,000 jobs from 2012 through 2022

The hospital component is the slowest growing segment and is projected to add only 7,300 through 2022, 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: 1990-2022**



These occupations are projected to add the most jobs over this ten-year period

Most Projected Jobs Added Among Practitioners From 2012-2022

Occupational Title	Employment				Annual Average Job Openings			Minimum Education Requirements
	Actual 2012	Projected 2022	Change 2012-2022 Number	Total %	Total	Growth	Replacement	
Registered Nurses	79,850	88,900	9,050	11.3	2,450	910	1,550	Associate's degree
Licensed Practical and Licensed Vocational Nurses	14,750	17,950	3,200	21.6	680	320	360	Postsecondary non-degree award
Physical Therapists	6,900	8,850	1,950	28.1	360	190	170	Doctoral or professional degree
Dental Hygienists	5,500	6,900	1,400	25.1	280	140	140	Associate's degree
Emergency Medical Technicians and Paramedics	8,100	9,400	1,300	16.0	350	130	220	Postsecondary non-degree award

Most Projected Jobs Added Among Support Workers From 2012-2022

Occupational Title	Employment				Annual Average Job Openings			Minimum Education Requirements
	Actual 2012	Projected 2022	Change 2012-2022 Number	Total %	Total	Growth	Replacement	
Home Health Aides	31,150	46,300	15,150	48.6	2,110	1,510	590	Less than high school
Nursing Assistants	51,800	60,050	8,250	16.0	1,810	830	990	Postsecondary non-degree award
Medical Assistants	14,700	17,850	3,150	21.5	600	320	280	Postsecondary non-degree award
Dental Assistants	8,700	10,200	1,500	17.1	330	150	180	Postsecondary non-degree award
Physical Therapist Aides	3,450	4,550	1,100	31.3	190	110	80	High school diploma or equivalent


These occupations are projected to increase by the largest percentage over the ten-year period

Highest Projected Percentage Growth Among Practitioners From 2012-2022

Occupational Title	Employment				Annual Average			Minimum Education Requirements
	Actual 2012	Projected 2022	Change 2012-2022	Total %	Total Job Openings	Growth	Replacement	
Diagnostic Medical Sonographers	2,550	3,550	1,000	39.1	140	100	40	Associate's degree
Physician Assistants	1,450	1,900	450	32.8	70	50	30	Master's degree
Physical Therapists	6,900	8,850	1,950	28.1	360	190	170	Doctoral or professional degree
Medical and Clinical Laboratory Technicians	2,500	3,050	550	23.2	120	60	70	Associate's degree
Nurse Practitioners	2,750	3,350	600	22.3	110	60	50	Master's degree

Highest Projected Percentage Growth Among Support Workers From 2012-2022

Occupational Title	Employment				Annual Average			Minimum Education Requirements
	Actual 2012	Projected 2022	Change 2012-2022	Total %	Total Job Openings	Growth	Replacement	
Physical Therapist Assistants	1,100	1,450	350	34.1	60	40	20	Associate's degree
Physical Therapist Aides	3,450	4,550	1,100	31.3	190	110	80	High school diploma or equivalent
Medical Assistants	14,700	17,850	3,150	21.5	600	320	280	Postsecondary non-degree award
Phlebotomists	3,850	4,650	800	20.6	150	80	70	Postsecondary non-degree award
Massage Therapists	4,350	5,100	750	17.8	120	80	50	Postsecondary non-degree award



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