

Driving Economic Success



Healthcare Industry Report

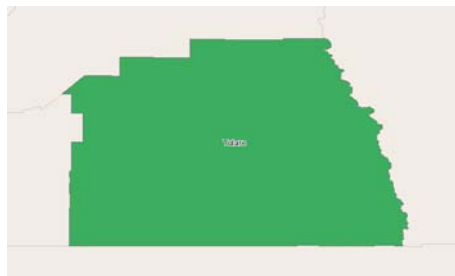
Tulare County Workforce Investment Board

4025 W. Noble Ave, Suite A.

Visalia, California 93277

559.713.5200

Healthcare Industry Report



Economic Modeling Specialists, Inc. www.economicmodeling.com

EMSI

Region Info

Region: Tulare County MSA

County Areas: Tulare, California (6107)

Executive Summary

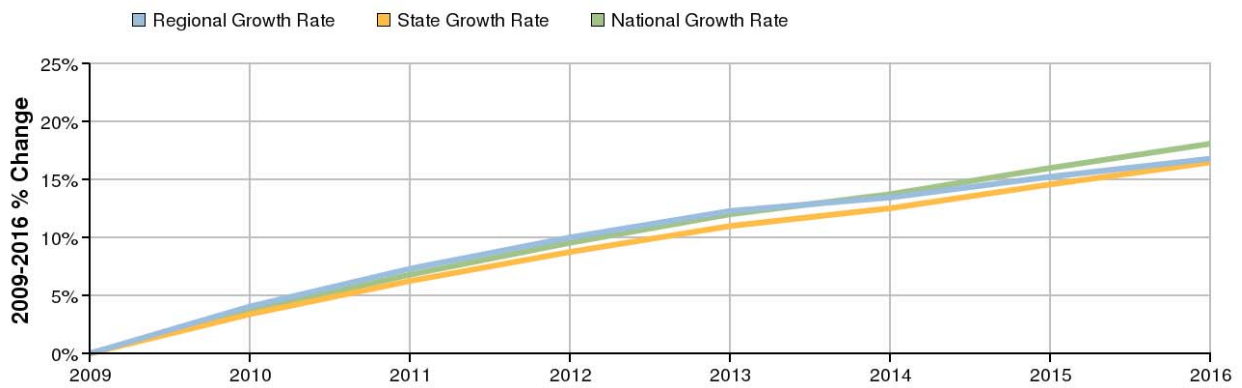
| Selected Industries | |
|---|--|
| Offices of physicians (NAICS 62111) | |
| Offices of dentists (NAICS 62121) | |
| Offices of chiropractors (NAICS 62131) | |
| Offices of optometrists (NAICS 62132) | |
| Offices of mental health practitioners (NAICS 62133) | |
| Offices of specialty therapists (NAICS 62134) | |
| Offices of all other health practitioners (NAICS 62139) | |
| Family planning centers (NAICS 62141) | |
| Outpatient mental health centers (NAICS 62142) | |
| Other outpatient care centers (NAICS 62149) | |
| Medical and diagnostic laboratories (NAICS 62151) | |
| Home health care services (NAICS 62161) | |
| Ambulance services (NAICS 62191) | |
| All other ambulatory health care services (NAICS 62199) | |
| General medical and surgical hospitals (NAICS 62211) | |
| Psychiatric and substance abuse hospitals (NAICS 62221) | |
| Other hospitals (NAICS 62231) | |
| Nursing care facilities (NAICS 62311) | |
| Residential mental retardation facilities (NAICS 62321) | |
| Residential mental and substance abuse care (NAICS 62322) | |
| Community care facilities for the elderly (NAICS 62331) | |
| Other residential care facilities (NAICS 62399) | |
| Child and youth services (NAICS 62411) | |
| Services for the elderly and disabled (NAICS 62412) | |
| Other individual and family services (NAICS 62419) | |
| Community food services (NAICS 62421) | |
| Community housing services (NAICS 62422) | |
| Emergency and other relief services (NAICS 62423) | |
| Vocational rehabilitation services (NAICS 62431) | |
| Child day care services (NAICS 62441) | |

| Basic Information | |
|-------------------------------------|----------|
| 2009 Industry Jobs | 14,531 |
| 2016 Industry Jobs | 16,970 |
| Total Change | 2,439 |
| Total % Change | 16.81% |
| Current Average Earnings per Worker | \$40,914 |

| Economic Indicators | |
|------------------------|------|
| 2009 Location Quotient | 0.72 |
| 2016 Location Quotient | 0.73 |

Source: EMSI Complete Employment - 4th Quarter 2009

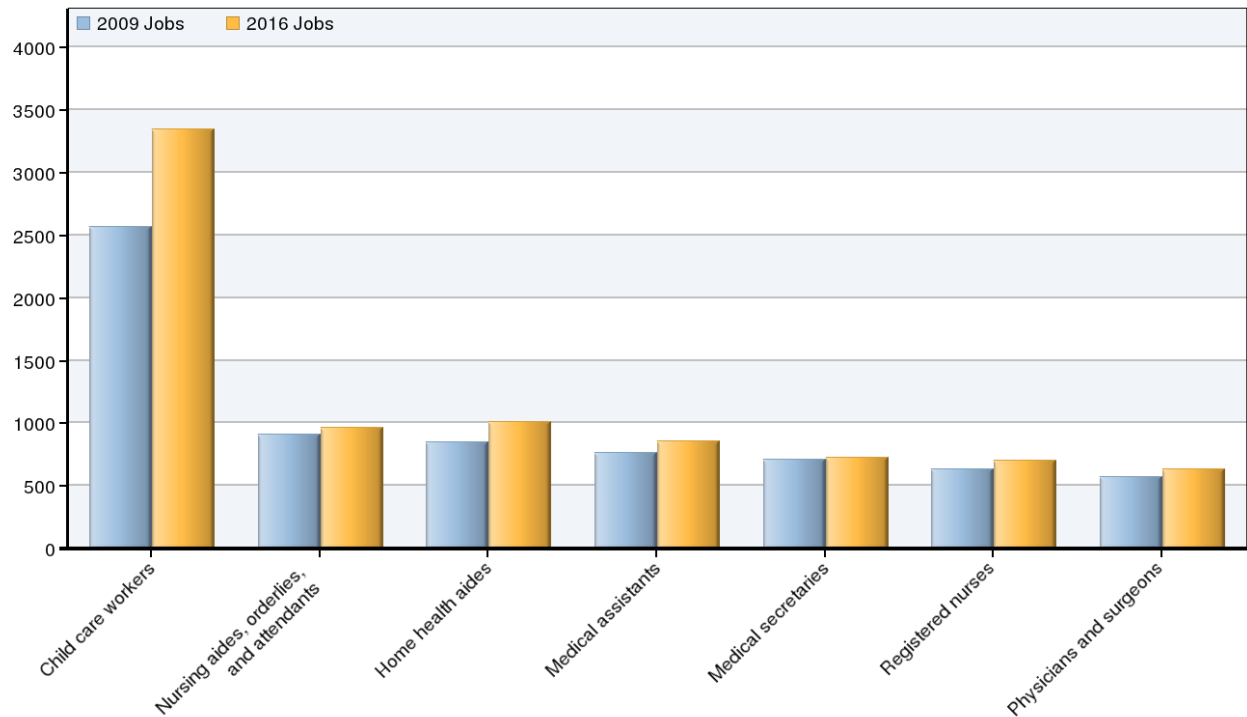
Industry Change Summary



| Description | 2009 Jobs | 2016 Jobs | Change | % Change | Current EPW | 2008 Establishments |
|----------------|------------|------------|-----------|----------|-------------|---------------------|
| Regional Total | 14,531 | 16,970 | 2,439 | 17% | \$40,914 | 766 |
| State Total | 1,850,567 | 2,155,215 | 304,648 | 16% | \$55,555 | 93,963 |
| National Total | 18,879,385 | 22,291,411 | 3,412,026 | 18% | \$48,157 | 782,498 |

Source: EMSI Complete Employment - 4th Quarter 2009

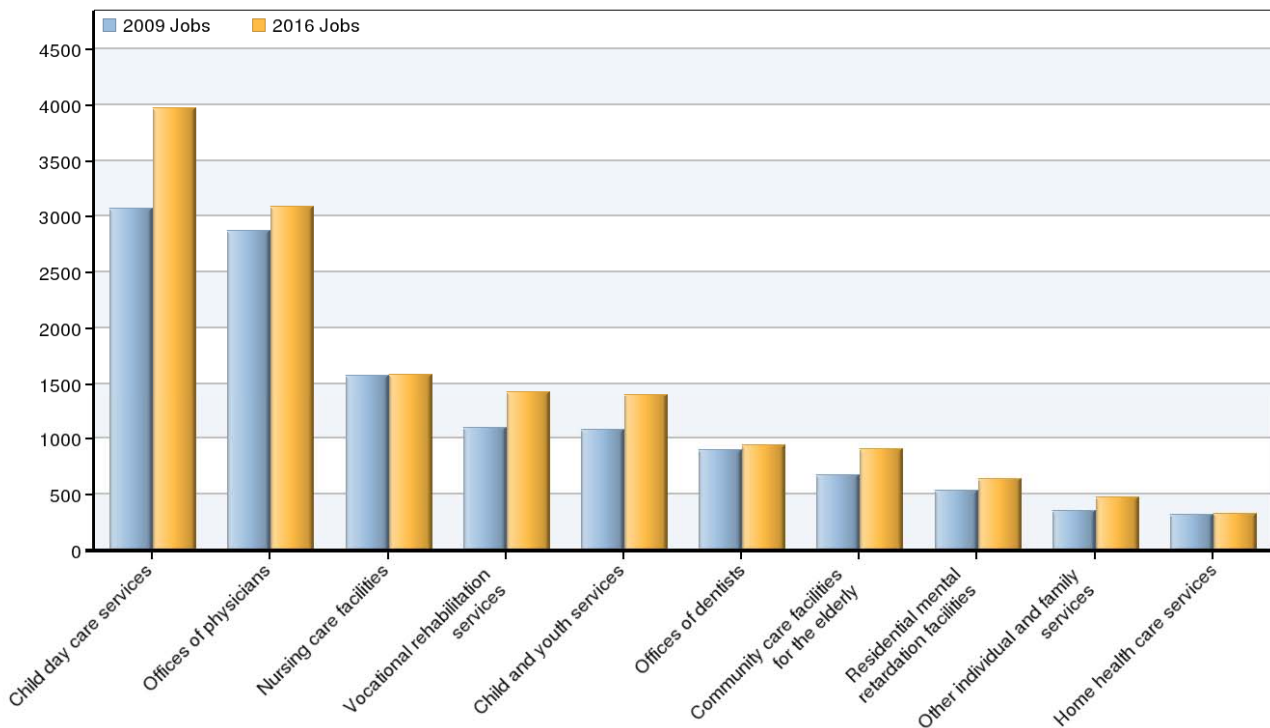
Top Occupations In Selected Industries



| SOC Code | Name | 2009 Jobs | 2016 Jobs | Change | % Change |
|----------|--|-----------|-----------|--------|----------|
| 39-9011 | Child care workers | 2,569 | 3,347 | 778 | 30% |
| 31-1012 | Nursing aides, orderlies, and attendants | 911 | 964 | 53 | 6% |
| 31-1011 | Home health aides | 845 | 1,007 | 162 | 19% |
| 31-9092 | Medical assistants | 761 | 855 | 94 | 12% |
| 43-6013 | Medical secretaries | 708 | 722 | 14 | 2% |
| 29-1111 | Registered nurses | 632 | 697 | 65 | 10% |
| 29-1069 | Physicians and surgeons | 568 | 632 | 64 | 11% |

Source: EMSI Complete Employment - 4th Quarter 2009

Industry Breakdown

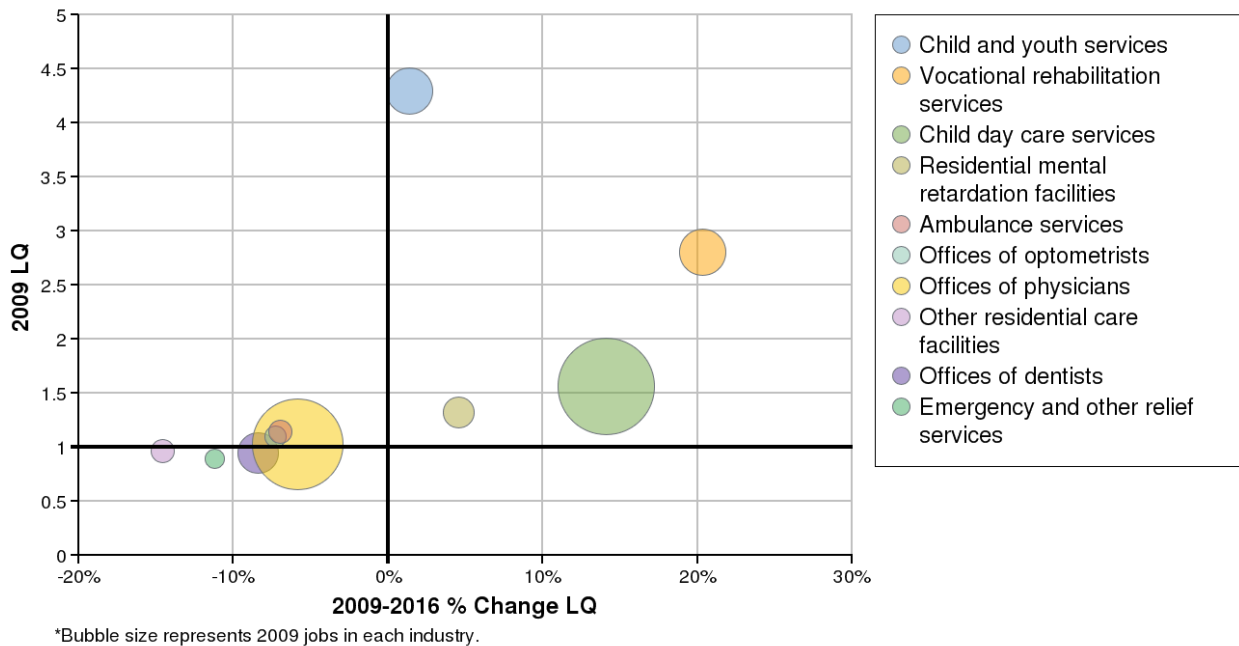


| NAICS Code | Description | 2009 Jobs | 2016 Jobs | Current EPW | 2008 Establishments |
|------------|---|-----------|-----------|-------------|---------------------|
| 62441 | Child day care services | 3,070 | 3,970 | \$11,845 | 44 |
| 62111 | Offices of physicians | 2,870 | 3,088 | \$82,655 | 251 |
| 62311 | Nursing care facilities | 1,577 | 1,581 | \$30,783 | 20 |
| 62431 | Vocational rehabilitation services | 1,096 | 1,426 | \$24,625 | 31 |
| 62411 | Child and youth services | 1,078 | 1,404 | \$34,467 | 13 |
| 62121 | Offices of dentists | 902 | 948 | \$52,655 | 126 |
| 62331 | Community care facilities for the elderly | 676 | 905 | \$23,545 | 41 |
| 62321 | Residential mental retardation facilities | 535 | 638 | \$23,418 | 39 |
| 62419 | Other individual and family services | 357 | 478 | \$98,986 | 19 |
| 62161 | Home health care services | 318 | 331 | \$19,964 | 16 |
| 62139 | Offices of all other health practitioners | 241 | 289 | \$41,233 | 15 |
| 62191 | Ambulance services | 231 | 224 | \$40,337 | 4 |
| 62412 | Services for the elderly and disabled | 215 | 213 | \$44,086 | 9 |
| 62399 | Other residential care facilities | 181 | 174 | \$28,800 | 8 |
| 62134 | Offices of specialty therapists | 172 | 190 | \$65,388 | 14 |
| 62149 | Other outpatient care centers | 159 | 181 | \$56,272 | 9 |
| 62132 | Offices of optometrists | 150 | 158 | \$43,706 | 26 |
| 62322 | Residential mental and substance abuse care | 144 | 173 | \$32,951 | 10 |
| 62151 | Medical and diagnostic laboratories | 119 | 133 | \$62,608 | 17 |
| 62133 | Offices of mental health practitioners | 101 | 111 | \$58,835 | 4 |
| 62131 | Offices of chiropractors | 96 | 91 | \$30,995 | 28 |
| 62142 | Outpatient mental health centers | 77 | 106 | \$39,090 | 6 |
| 62422 | Community housing services | 65 | 69 | \$24,051 | 4 |
| 62423 | Emergency and other relief services | 32 | 30 | \$24,619 | 4 |
| 62211 | General medical and surgical hospitals | 25 | 25 | \$70,794 | 0 |
| 62199 | All other ambulatory health care services | 21 | 15 | \$37,455 | 1 |
| 62421 | Community food services | 19 | 17 | \$33,826 | 3 |
| 62231 | Other hospitals | <10 | <10 | -- | 0 |

| | | | | | |
|-------|---|--------|--------|----------|-----|
| 62221 | Psychiatric and substance abuse hospitals | <10 | <10 | -- | 0 |
| 62141 | Family planning centers | <10 | <10 | -- | 1 |
| | Total | 14,531 | 16,970 | \$40,914 | 766 |

Source: EMSI Complete Employment - 4th Quarter 2009

Location Quotient Breakdown



| NAICS Code | Description | 2009 Jobs | 2009 LQ | 2016 LQ |
|------------|---|---------------|-------------|-------------|
| 62411 | Child and youth services | 1,078 | 4.30 | 4.36 |
| 62431 | Vocational rehabilitation services | 1,096 | 2.80 | 3.37 |
| 62441 | Child day care services | 3,070 | 1.56 | 1.78 |
| 62321 | Residential mental retardation facilities | 535 | 1.32 | 1.38 |
| 62191 | Ambulance services | 231 | 1.15 | 1.07 |
| 62132 | Offices of optometrists | 150 | 1.10 | 1.02 |
| 62111 | Offices of physicians | 2,870 | 1.03 | 0.97 |
| 62399 | Other residential care facilities | 181 | 0.96 | 0.82 |
| 62121 | Offices of dentists | 902 | 0.95 | 0.87 |
| 62423 | Emergency and other relief services | 32 | 0.89 | 0.79 |
| 62311 | Nursing care facilities | 1,577 | 0.88 | 0.83 |
| 62331 | Community care facilities for the elderly | 676 | 0.87 | 0.93 |
| 62419 | Other individual and family services | 357 | 0.73 | 0.74 |
| 62322 | Residential mental and substance abuse care | 144 | 0.71 | 0.70 |
| 62139 | Offices of all other health practitioners | 241 | 0.63 | 0.61 |
| 62422 | Community housing services | 65 | 0.62 | 0.57 |
| 62131 | Offices of chiropractors | 96 | 0.57 | 0.47 |
| 62421 | Community food services | 19 | 0.51 | 0.45 |
| 62134 | Offices of specialty therapists | 172 | 0.45 | 0.41 |
| 62151 | Medical and diagnostic laboratories | 119 | 0.44 | 0.44 |
| 62133 | Offices of mental health practitioners | 101 | 0.44 | 0.42 |
| 62149 | Other outpatient care centers | 159 | 0.41 | 0.40 |
| 62142 | Outpatient mental health centers | 77 | 0.41 | 0.49 |
| 62412 | Services for the elderly and disabled | 215 | 0.28 | 0.21 |
| 62161 | Home health care services | 318 | 0.22 | 0.17 |
| 62199 | All other ambulatory health care services | 21 | 0.15 | 0.10 |
| 62211 | General medical and surgical hospitals | 25 | 0.01 | 0.00 |
| 62141 | Family planning centers | <10 | -- | -- |
| 62231 | Other hospitals | <10 | -- | -- |
| 62221 | Psychiatric and substance abuse hospitals | <10 | -- | -- |
| | Total | 14,531 | 0.72 | 0.73 |

Source: EMSI Complete Employment - 4th Quarter 2009

Data Sources and Calculations

Industry Data

In order to capture a complete picture of industry employment, EMSI basically combines covered employment data from Quarterly Census of Employment and Wages (QCEW) produced by the Department of Labor with total employment data in Regional Economic Information System (REIS) published by the Bureau of Economic Analysis (BEA), augmented with County Business Patterns (CBP) and Nonemployer Statistics (NES) published by the U.S. Census Bureau. Projections are based on the latest available EMSI industry data, 15-year past local trends in each industry, growth rates in statewide and (where available) sub-state area industry projections published by individual state agencies, and (in part) growth rates in national projections from the Bureau of Labor Statistics.

Occupation Data

Organizing regional employment information by occupation provides a workforce-oriented view of the regional economy. EMSI's occupation data are based on EMSI's industry data and regional staffing patterns taken from the Occupational Employment Statistics program (U.S. Bureau of Labor Statistics). Wage information is partially derived from the American Community Survey. The occupation-to-program (SOC-to-CIP) crosswalk is based on one from the U.S. Department of Education, with customizations by EMSI.

Location Quotient

Location quotient (LQ) is a way of quantifying how concentrated a particular industry, cluster, occupation, or demographic group is in a region as compared to the nation. It can reveal what makes a particular region unique in comparison to the national average.

State Data Sources

This report uses state data from the following agencies: California Labor Market Information Department.