

IDAHO'S HEALTH CARE INDUSTRY



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IDAHO'S HEALTH CARE INDUSTRY

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Idaho Department of Labor

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Summary of Key Findings

Health care employment has been one of the few consistent bright spots in the Idaho economy. While most industries are starting to recover from the last recession, health care had no need to recover. Idaho's health care companies added 46 percent to their payrolls in the last decade. This ranked Idaho second in the nation. The future also looks strong with projected growth of 36 percent. This again lands Idaho second nationally.

Idaho follows the national employment pattern with the majority of its health care employment falling into ambulatory health care services followed by hospitals. Nursing care and residential care facilities had the smallest portion of Idaho's health care employment with only 20 percent.

Industry level earnings per worker were not very strong. At an average \$49,212, Idaho's earnings per worker ranked last in the country. But in terms of wages paid to just health care occupations, Idaho's standing improves. With a median wage of \$24.16 an hour, Idaho's health care occupations ranked 35th among the states, and both the average wage for the industry and the median wage for health care occupations were substantially higher than the average wage for all Idaho industries and the median wage for all occupations. Clearly health care provides some of the best opportunities for the state's job seekers.

Within Idaho's regions, health care employment varied, falling mostly along population lines. Southwestern Idaho with its considerably larger population base and the presence of two large regional hospitals had almost half of the state's total health care industry employment. Eastern Idaho followed with 12 percent. North central Idaho had the least at 8 percent.

Industry Analysis

The health care industry¹ currently makes up the second largest portion of Idaho's private-sector employment covered by the unemployment insurance system. In 2012, health care made up 12.7 percent of the total, which was a little over two percentage points below retail trade. The next largest industry, manufacturing, made up 11.2 percent.

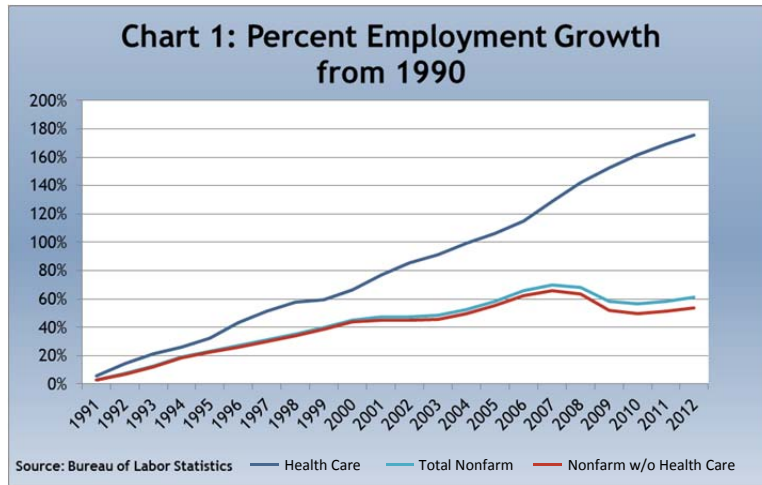
Health care has also been growing more rapidly than the economy as a whole. Since 1990 total nonfarm employment in Idaho has grown 61 percent, an annual average of 2.8 percent, while private-sector health care employers had expanded their payrolls by 176 percent, or 8 percent a year on average. Total nonfarm employment is still feeling the effects of the recent recession at almost 33,000 fewer jobs than at the 2007

Table 1: Covered Private Industry Employment for Idaho	
	2012
Total Private	503,780
Retail Trade	76,420
Health Care	64,090
Manufacturing	56,508
Accommodation and Food Services	51,782
Admin Support and Waste Management	37,700

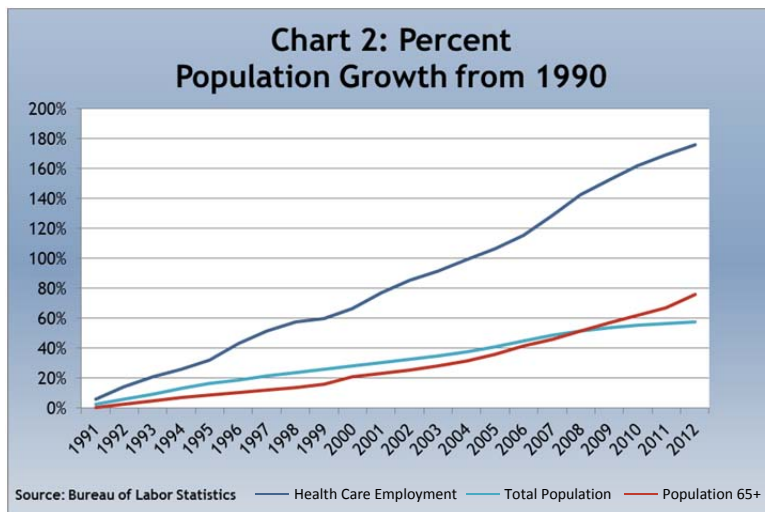
Source: Idaho Department of Labor, Quarterly Census of Employment and Wages

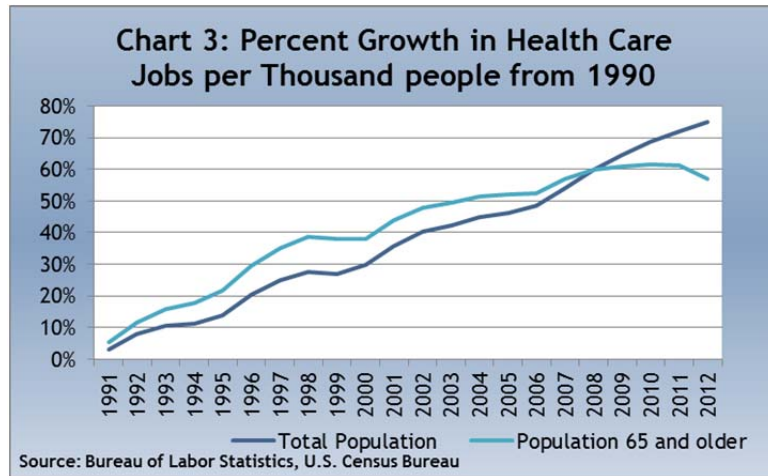
¹ Health care employment was measured as a combination of three, three-digit NAICS categories: 621 Ambulatory Health Care Services, 622 Hospitals and 623 Nursing and Residential Care Facilities.

peak, but health care is at an all-time high. Removing health care employment from total nonfarm employment mutes the expansions to some degree in the 1990s and the middle of last decade as well as deepening the recessionary declines in the early and mid-late 2000s.

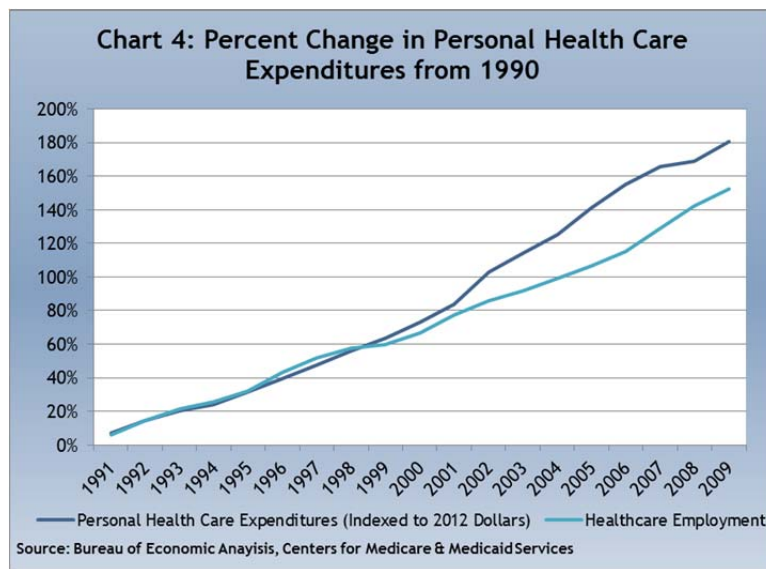


While the general state of the economy does affect health care, the employment level in this industry has proven very recession resistant in Idaho because of the many other influences on the industry’s employment decisions. A common one is the change in population, and another is the aging of the population. Idaho’s health care industry is outpacing that growth as well. In 1990, there were roughly 23 jobs in health care for every thousand people in Idaho, translating to 195 health care jobs per thousand for the population 65 and older. By 2012, that increased 75 percent to 41 health care jobs per thousand people, or 306 per thousand for residents 65 and older. In recent years Idaho’s older population has grown increasingly faster, causing the number employed per thousand to level off and decline slightly in the most recent data.





Concurrently, health care expenditures have grown at a faster rate than employment. Personal health care expenditures are defined by the Centers for Medicare & Medicaid Services as total spending on health care goods and services.² Chart 4 shows the percent growth in personal health care expenditures in Idaho compared to the growth in private health care employment. In order to account for inflation, the personal health care expenditure data was indexed to 2012 dollars using the Consumer Price Index for All Urban Consumers. The Health Economic Resource Center in the Department of Veterans Affairs recommends that index over the Consumer Price Index for medical costs because it takes into account increases in productivity so inflation is not overstated.³



² Centers for Medicare & Medicaid Services: *State Health Expenditure Accounts: State of Provider Definitions and Methodology, 1980-2009*. <http://www.cms.gov/Research-Statistics-Data-and-Systems/Statistics-Trends-and-Reports/NationalHealthExpendData/Downloads/prov-methodology.pdf>

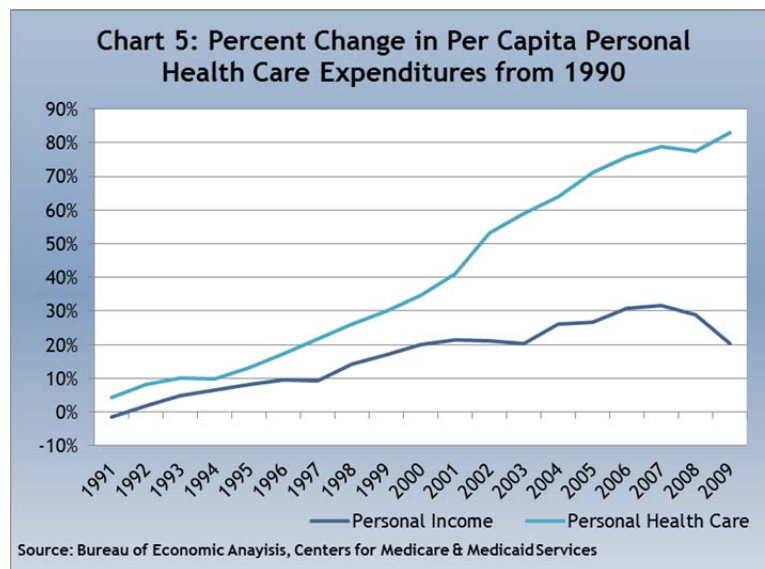
³ Department of Veterans Affairs, Health Economic Resource Center. http://www.herc.research.va.gov/resources/faq_a03.asp

Since 1999, personal health care expenditures have increased faster than health care jobs. Between 1999 and 2009, personal care expenditures rose an inflation-adjusted 72 percent while employment was up 58 percent. The majority of the growth came from increases in spending for hospital care, which was the largest spending component of personal health care. While hospital care spending grew the most in dollars during that decade, prescription drug costs grew the fastest at 120 percent after accounting for inflation.

	1999	2009	Change	% Change
Personal Health Care	\$5,114	\$8,775	\$3,660	71.6%
Hospital Care	\$1,842	\$3,207	\$1,365	74.1%
Physician & Clinical Services	\$1,191	\$1,902	\$712	59.8%
Other Professional Services	\$222	\$383	\$161	72.7%
Dental Services	\$383	\$614	\$231	60.1%
Home Health Care	\$106	\$196	\$90	85.4%
Prescription Drugs	\$479	\$1,052	\$573	119.6%
Other Non-durable Medical Products	\$143	\$170	\$27	19.1%
Durable Medical Products	\$152	\$209	\$57	37.5%
Nursing Home Care	\$318	\$484	\$166	52.1%
Other Health, Residential and Personal Care	\$279	\$558	\$278	99.8%

Source: Centers for Medicare & Medicaid Services

Personal health care spending has also outpaced personal income growth. Chart 5 compares the growth from 1990 for per capita personal income and per capita personal health care spending in 2012 dollars. While Idahoans' incomes slipped during the last two recessions, personal health care spending has increased consistently. The only year that registered a small decline in per capita personal health care expenditures was 2008 – the first year of the recession. Personal income on the other hand has had several flat growth periods, including two years of outright decline due to the recession.



One of the main reasons health care spending and for that matter health care employment has not slipped, regardless of the general economic situation, is health care's inelastic demand – the fact that changes in prices or income do not have much effect in the amount of health care being consumed. A literature review on health care elasticity done by the RAND Corp. for the U.S. Department of Defense in 2002 settled on a price elasticity of - 0.17 and an income elasticity between 0 and 0.2.⁴ The first measure means that if the cost of health care rises by one percent, the estimated amount of health care consumed would decline by 0.17 percent. Likewise, if income were to rise by one percent, the estimated amount of health care consumed would either not increase at all or increase slightly by 0.2 percent. In both cases, the demand for health care was not very responsive to changes in either prices or income. People tend to consume a similar amount of health care regardless of what is going on in the market.

Table 3: Health Care Industry Demographics				
		Health Care		All Industry
		1992	2011	2011
Gender	Female	82.0%	78.8%	47.1%
	Male	18.0%	21.2%	52.9%
Age Group	>25	12.4%	10.3%	14.6%
	25-34	25.9%	24.6%	23.2%
	35-44	31.9%	23.6%	21.6%
	45-54	19.1%	22.3%	22.2%
	55+	10.8%	19.2%	18.4%
Education	Less than HS	6.2%	7.9%	12.3%
	High school diploma	27.2%	26.4%	31.8%
	Some college or associate degree	39.5%	38.8%	34.0%
	Bachelor degree or above	27.0%	26.9%	21.9%

Source: Quarterly Workforce Indicators

The demographic makeup of the health care industry in Idaho was similar to the makeup of all other industries with one major difference. The gender of workers in stable health care industry jobs – jobs lasting at least one full quarter – was greatly skewed towards women, and that had only changed slightly over time. In 1992, the first full year of stable jobs data, women made up 82 percent of health care employment. By 2011, more men had joined the ranks, but only enough to drop the percentage of women workers a little over three percentage points. In contrast, all industry stable employment was almost equal – slightly favoring males with 53 percent.

The age of the workforce was a concern for many as the large 'baby boom' generation approaches retirement. In health care that was no exception. Workers 55 years old or older made up almost a fifth of the total stable employment. Twenty years earlier they made up just a tenth. But this was not much different from the employment picture for all industries. The

⁴ The RAND Corporation, The Elasticity of Demand for Health Care: A Review of the Literature and Its Application to the Military Health System. http://www.rand.org/content/dam/rand/pubs/monograph_reports/2005/MR1355.pdf

only slight difference was in the youngest age group where almost 15 percent of workers in all industry stable employment was younger than 25. In health care only 10 percent was that young.

The education makeup of workers in stable health care jobs had changed little over time. But there was a difference when compared to all other industries. Health care stable jobs employment is skewed more toward higher educational attainment. Close to 66 percent of the workers had at least some college or an associate degree. That compared to 56 percent for all industries.

By State

Idaho ranked near the bottom among the states in its percentage of the nation's total health care employment. That was not a surprise considering Idaho's relatively small population compared to other states. Idaho accounted for five-tenths of a percentage point of the nation's total health care employment to rank 42nd. Among states in the Northwest, Idaho was just above Montana at 44th and well above Wyoming, which had the lowest health care employment in the country. Washington at 1.9 percent of the national total and Oregon at 1.2 percent had the largest health care employment in the region, but they were far behind the largest states. California, Texas and New York combined to account for almost a quarter of all health care employment.

As part of total employment, health care was 10.6 percent in Idaho, below the national rate of 10.9 percent but ranking in the middle third of the states at 31st and higher than the surrounding states except for Montana. Montana health care jobs accounted for 12.2 percent of total jobs to rank 14th. Wyoming again was at the bottom with 6.4 percent of all jobs in health care. Nevada ranked 49th with 7.1 percent.

Idaho's health care workers equaled 4 percent of its total population, ranking the state 39th. Oregon was higher although just below the national figure of 4.5 percent. Montana still led the region but fell to 18th nationally. Nevada ranked last in the nation at 2.9 percent, and Wyoming was second-lowest at 3 percent.

Growth in health care employment has been very robust in Idaho. The state ranked second nationally behind Arizona in growth between 2003 and 2013. Regionally, all of the surrounding states saw health care employment expand beyond the national average of 23 percent. Along with Idaho, Utah and Nevada both landed in the top 10, but Nevada was more than 10 percentage points below Idaho's growth rate.

Idaho's strong growth rate is projected to continue for the next decade at 35.5 percent, second only to Utah at 35.7 percent. Oregon and Wyoming follow with rates above the national rate of 22.7 percent. Montana is projected to have the region's slowest health care growth rate at 14.1 percent, but that would still exceed projected national growth for all jobs of 12.7 percent.

Idaho ranked 51st in average annual wages per worker in the health care industry at \$49,212, Utah was slightly higher at \$49,578. Both were more than \$10,000 below the national average of \$59,797. Nevada tops the region with \$68,517 to rank fourth nationwide. Only Washington and Oregon join Nevada with earnings per worker higher than the national average.

Idaho fares much better in the comparison of wages for its health care workers to all other workers. While not the sector with the highest wages in the state, average earnings for Idaho health care workers were 9.7 percent above the average for all workers. That ranked Idaho 17th in the nation. Nevada ranked first nationally at 129 percent of the all-worker average. Utah was the only state in the region that was below the national average of 98.6 percent. Fifteen states including Utah and Washington had health care earnings ratios less than their all industry totals.

The relative level of health care businesses in each state was fairly similar. Four states including Idaho had a higher portion of health care businesses than the national average of 6.9 percent of all businesses. Idaho ranked 18th in the country at 7.7 percent, coming in behind Nevada regionally. Washington and Wyoming, both at 5.5 percent, ranked 48th and 49th nationally.

Details for all states are in Appendix 2 on page 22.

Table 4: Idaho's Health Care Industry Labor Force Metrics and Surrounding States — 2013											
SIZE			RELATIVE SIZE						GROWTH		
Health Care Employment to Nation			Health Care Employment to State Employment			Health Care Employment to State Population - 2012			Growth in Health Care Employment		
Area	Percent	Rank	Area	Percent	Rank	Area	Percent	Rank	Area	2003-2013	Rank
National	100.0%	-	Montana	12.2%	14	Montana	5.0%	18	Idaho	45.9%	2
Washington	1.9%	21	National	10.9%	-	National	4.5%	-	Utah	41.0%	4
Oregon	1.2%	27	Idaho	10.6%	31	Oregon	4.4%	31	Nevada	34.1%	7
Utah	0.8%	33	Oregon	10.5%	32	Idaho	4.0%	39	Montana	28.0%	13
Nevada	0.6%	38	Washington	9.3%	43	Washington	3.9%	40	Wyoming	24.5%	19
Idaho	0.5%	42	Utah	8.9%	46	Utah	3.9%	41	Oregon	24.1%	20
Montana	0.4%	44	Nevada	7.1%	49	Wyoming	3.0%	50	Washington	23.4%	23
Wyoming	0.1%	51	Wyoming	6.4%	51	Nevada	2.9%	51	National	23.0%	-
PROJECTED GROWTH			EARNINGS			RELATIVE EARNINGS			RELATIVE ESTABLISHMENTS		
Projected Growth of Health Care Employment			Health Care Average Earnings			Earnings Ratio - State Health Care to State Total			Health Care Establishments to Total Establishments		
Area	2013-2023	Rank	Area	EPW	Rank	Area	Percent	Rank	Area	Percent	Rank
Utah	35.7%	1	Nevada	\$68,517	4	Nevada	129.4%	1	Nevada	8.0%	12
Idaho	35.5%	2	Washington	\$63,547	10	Montana	117.1%	5	Idaho	7.7%	18
Oregon	29.7%	11	Oregon	\$60,853	16	Oregon	112.0%	15	Oregon	7.7%	20
Wyoming	27.5%	14	National	\$59,797	-	Idaho	109.7%	17	Utah	7.1%	30
National	22.7%	-	Wyoming	\$57,544	27	Wyoming	105.1%	26	National	6.9%	-
Washington	20.6%	31	Montana	\$54,421	37	Washington	99.8%	37	Montana	5.9%	44
Nevada	18.3%	41	Utah	\$49,578	50	National	99.6%	-	Washington	5.5%	48
Montana	14.1%	49	Idaho	\$49,212	51	Utah	97.2%	41	Wyoming	5.5%	49

Source: QCEW Employees - EMSI 2013.2 Class of Worker
Idaho Department of Labor Health Care Business Scan 2013

NAICS 621 Ambulatory Health Care Services

Companies in the ambulatory health care services subsector usually provide outpatient services. This industry tends to be the largest of the three health care subsectors with a national average of 44.7 percent of all health care employment. Montana was the only state in the region where ambulatory health care employment — at 34.4 percent of all health care employment — was second to hospital employment. Idaho at 45.5 percent was near the

national average for ambulatory health care. Both Nevada and Wyoming had noticeably larger portions of their employment in ambulatory health care at over 55 percent.

Looking at the sectors that make up ambulatory health care, doctors' offices account for the largest portion in Idaho and the surrounding states at 13.6 percent – less than the national average at 16.8 percent. Nevada had the largest proportion at over 21 percent while Montana had the smallest at 11.8 percent.

In a departure from the surrounding states but not the nation, Idaho's second largest ambulatory health care sector was home health services. At 10.7 percent it was above the national average of 8.7 percent. The other surrounding states had dentists offices in second place except Wyoming, which had offices of other practitioners in second.

The smallest ambulatory health services sector nationally was medical and diagnostic laboratories. Idaho follows suit at only 0.9 percent ambulatory health care employment. Utah and Nevada stand out by having nearly doubled the national rate of 1.7 percent.

	Idaho	Washington	Oregon	Utah	Nevada	Montana	Wyoming	National
Ambulatory Health Care	45.4%	48.9%	43.3%	48.9%	55.1%	34.4%	55.5%	44.7%
Offices of Physicians	13.6%	17.4%	16.5%	18.7%	21.1%	11.8%	18.5%	16.8%
Offices of Dentists	7.6%	8.8%	7.9%	10.3%	9.2%	5.6%	9.7%	5.9%
Offices of Other Health Practitioners	6.6%	7.1%	7.4%	6.0%	6.7%	5.5%	10.6%	5.1%
Outpatient Care Centers	4.4%	8.2%	5.5%	2.6%	4.9%	3.9%	8.2%	4.7%
Medical and Diagnostic Laboratories	0.9%	1.9%	1.8%	3.2%	3.6%	0.4%	1.7%	1.7%
Home Health Care Services	10.7%	3.7%	2.7%	6.7%	7.1%	5.4%	3.6%	8.7%
Other Ambulatory Health Care	1.6%	1.8%	1.6%	1.4%	2.6%	2.0%	3.2%	1.8%

Source: QCEW Employees - EMSI 2013.2 Class of Worker
Idaho Department of Labor Health Care Business Scan 2013

NAICS 622 Hospitals

Hospital employment made up the second largest portion of health care employment nationally and in Idaho and most surrounding states. Montana and Wyoming were the two exceptions. Montana had most of its health care employment – 41.8 percent – in hospitals. Wyoming was on the other end with only 18 percent of its total health care employment in hospitals, ranking third behind nursing and residential care facilities.

True for all the surrounding states and the nation, the overwhelming majority of hospital employment was in general medical and surgical hospitals. Idaho's 31.3 percent was slightly higher than the national average of 30.8 percent. The other two sectors that are included in the hospital industry made up a fraction of the total health care employment although Montana and Wyoming differ from the nation and the other states by having more employment in psychiatric and substance abuse hospitals than other specialty hospitals.

	Idaho	Washington	Oregon	Utah	Nevada	Montana	Wyoming	National
Hospitals (Private)	34.4%	27.8%	30.8%	30.2%	30.2%	41.8%	18.1%	33.1%
General Medical and Surgical Hospitals (Private)	31.3%	27.0%	30.1%	26.3%	26.4%	39.7%	15.1%	30.8%
Psychiatric and Substance Abuse Hospitals (Private)	0.5%	0.3%	0.2%	0.7%	1.2%	1.3%	1.9%	0.7%
Specialty (except Psychiatric and Substance Abuse) Hospitals (Private)	2.7%	0.5%	0.5%	3.2%	2.6%	0.8%	1.2%	1.6%

Source: QCEW Employees - EMSI 2013.2 Class of Worker
Idaho Department of Labor Health Care Business Scan 2013

NAICS 623 Nursing and Residential Care Facilities

Nursing and residential care facilities made up the smallest portion of health care employment on the national level. The same was true for Idaho and the surrounding states, with the exception of Wyoming where this industry lands in second. Idaho was near the bottom of this list with only 20.2 percent of its total health care employment in nursing facilities. Nevada was the only state with less at 14.6 percent.

The more detailed industry breakdown was mixed between the states and the nation as a whole. In Idaho, as well as nationally, nursing care facilities had the most employment followed by community care facilities. In Washington and Oregon, these two industries reversed while Wyoming had other residential care facilities above community care facilities.

	Idaho	Washington	Oregon	Utah	Nevada	Montana	Wyoming	National
Nursing and Residential Care Facilities	20.2%	23.3%	25.9%	20.9%	14.6%	23.8%	26.3%	22.2%
Nursing Care Facilities	8.7%	9.0%	6.4%	8.4%	7.3%	10.1%	11.9%	11.5%
Residential Mental Retardation, Mental Health and Substance Abuse Facilities	3.3%	2.7%	6.4%	6.1%	2.4%	4.0%	3.7%	4.0%
Community Care Facilities for the Elderly	6.1%	11.0%	12.3%	4.5%	4.2%	5.4%	3.9%	5.6%
Other Residential Care Facilities	2.1%	0.6%	0.8%	1.8%	0.8%	4.3%	6.8%	1.1%

Source: QCEW Employees - EMSI 2013.2 Class of Worker

Idaho Department of Labor Health Care Business Scan 2013

Regional Industry Breakdown

Total health care employment broke down mostly along population lines with southwestern Idaho having almost half of all the health care employment in the state. As a percentage of total employment, the region ranked second at 11.4 percent. North central Idaho topped this list with 12.5 percent of total employment in health care. The northern region of the state with its proximity to Spokane, Wash., ranked last at 8.8 percent.

The regional comparison was similar for health care employment as a percentage of total population. North central and southwestern Idaho had the highest ratio at over 4 percent, which was the statewide average. The other regions fell below that average. The northern region of the state was lowest at 3 percent.

All of Idaho's regions saw health care employment grow between 2003 and 2013. The growth percentage for southeastern and south central Idaho are a little misleading because two county owned hospitals were purchased by private companies, shifting their statistical status from public to private. In terms of total employment growth, southwestern Idaho added over 12,000 jobs while the next closest region, south central, added just over 3,000.

Projected health care employment growth is also very strong with northern Idaho growing at the fastest rate of 45.7 percent over the next decade. The north central region is projected to grow at the slowest rate of 25.1 percent, but that is still faster than Idaho overall jobs economy, which is projected by Economic Modeling Specialists International to grow 16.5 percent.

Average earnings per worker were heavily skewed towards the most populous region of the state. Southwestern Idaho had health care earnings per worker of \$54,643 — about

\$8,000 higher than the second region, south central Idaho. The combination of the much higher earnings per worker and the higher total employment skews Idaho's average earnings per worker in health care upward, leaving only southwestern Idaho above the state average. Northern Idaho at \$40,102 came in nearly \$9,000 below the state average.

But compared to the average wage for all jobs, south central Idaho's health care workers averaged 118 percent of the all-worker average wage, eight percentage points higher than the statewide average of 109.7 percent. Only two regions, eastern and northern Idaho, had health care worker earnings below the statewide average wage for all workers. The margins in both were small – eastern Idaho was a tenth of a point lower and northern Idaho was 3.8 percentage points below.

The concentration of establishments was similar for Idaho's region, varying only by 2 percentage points. The eastern region had almost 9 percent of its business in the health care industry while south central Idaho has almost 7 percent.

Table 8: Idaho's Regional Health Care Industry Labor Force Metrics — 2013											
SIZE			RELATIVE SIZE						GROWTH		
Health Care Employment to State			Health Care Employment to Region Employment			Health Care Employment to Region Population			Growth in Health Care Employment		
Area	Percent	Rank	Area	Percent	Rank	Area	Percent	Rank	Area	2003-2013	Rank
Idaho	100.0%	-	North Central	12.5%	1	North Central	4.8%	1	Southeast	105.6%	1
Southwestern	49.4%	1	Southwestern	11.4%	2	Southwestern	4.5%	2	South Central	78.2%	2
Eastern	11.9%	2	Southeast	10.6%	3	Idaho	4.0%	-	Idaho	45.9%	-
South Central	11.1%	3	Idaho	10.6%	-	South Central	3.8%	3	Southwestern	43.4%	3
Northern	10.1%	4	Eastern	9.7%	4	Southeast	3.6%	4	Northern	33.4%	4
Southeast	9.4%	5	South Central	9.1%	5	Eastern	3.6%	5	Eastern	33.1%	5
North Central	7.9%	6	Northern	8.8%	6	Northern	3.0%	6	North Central	22.3%	6

PROJECTED GROWTH			EARNINGS			RELATIVE EARNINGS			RELATIVE ESTABLISHMENTS		
Projected Growth of Health Care Employment			Health Care Average Earnings			Earnings Ratio - Region Health Care to Region Total			Health Care Establishments to Total Establishments		
Area	2013-2023	Rank	Area	EPW	Rank	Area	Percent	Rank	Area	Percent	Rank
Northern	45.7%	1	Southwestern	\$54,643	1	South Central	118.0%	1	Eastern	8.9%	1
South Central	43.6%	2	Idaho	\$49,212	-	Southwestern	113.5%	2	Southeast	8.8%	2
Southeast	37.9%	3	South Central	\$46,570	2	Idaho	109.7%	-	Idaho	7.7%	-
Idaho	35.5%	-	Eastern	\$44,585	3	Southeast	104.6%	3	Southwestern	7.3%	3
Eastern	34.7%	4	Southeast	\$43,854	4	North Central	100.1%	4	Northern	7.1%	4
Southwestern	33.0%	5	North Central	\$43,127	5	Eastern	99.9%	5	North Central	6.9%	5
North Central	25.1%	6	Northern	\$40,102	6	Northern	96.2%	6	South Central	6.8%	6

Source: QCEW Employees - EMSI 2013.2 Class of Worker
Idaho Department of Labor Health Care Business Scan 2013

NAICS 621 Ambulatory Health Care Services

Ambulatory health care services made up the largest portion of health care employment in most regions. In northern and eastern Idaho it was over 60 percent, more than 15 percentage points higher than the statewide percentage.

Of the sectors that make up ambulatory health care, doctors' offices had the largest share of employment in most regions followed by home health care services. Dentists offices were usually second. One notable exception was eastern Idaho where 12.1 percent of health care employment was in outpatient care centers – surgical centers, treatment clinics and similar operations. That was a higher percentage than any other region.

Table 9: Percent of Healthcare Employment within Ambulatory Health Care Services							
	Northern	North Central	Southwestern	South Central	Southeast	Eastern	Idaho
Ambulatory Health Care	64.7%	39.3%	41.8%	31.3%	44.5%	61.4%	45.4%
Offices of Physicians	20.2%	11.8%	12.9%	8.1%	11.3%	18.9%	13.6%
Offices of Dentists	10.1%	5.2%	6.6%	7.2%	8.8%	10.9%	7.6%
Offices of Other Health Practitioners	9.5%	5.7%	6.3%	5.3%	5.6%	8.4%	6.6%
Outpatient Care Centers	6.3%	2.4%	2.6%	3.0%	5.9%	12.1%	4.4%
Medical and Diagnostic Laboratories	1.6%	2.2%	0.9%	*	0.3%	0.2%	0.9%
Home Health Care Services	14.1%	12.0%	11.2%	6.9%	10.6%	8.3%	10.7%
Other Ambulatory Health Care	2.9%	*	1.4%	0.7%	2.0%	2.6%	1.6%

Source: QCEW Employees - EMSI 2013.2 Class of Worker
Idaho Department of Labor Health Care Business Scan 2013

NAICS 622 Hospitals

Hospital employment was mixed regionally. Southwestern Idaho, with its two large regional medical centers, and the south central Idaho had the majority of their health care employment in this industry. The northern region had only 4 percent.

Like the state, the overwhelming majority of employment in hospitals was in general medical and surgical hospitals. The only exception was northern Idaho where the majority of employment was in specialty hospitals.

Table 10: Percent of Health Care Employment within Hospitals							
	Northern	North Central	Southwestern	South Central	Southeast	Eastern	Idaho
Hospitals (Private)	4.0%	33.9%	42.6%	45.0%	33.6%	17.8%	34.4%
General Medical and Surgical Hospitals (Private)	0.7%	33.2%	37.3%	44.6%	33.6%	16.8%	31.3%
Psychiatric and Substance Abuse Hospitals (Private)	0.2%	0.0%	1.0%	0.0%	0.0%	*	0.5%
Specialty (except Psychiatric and Substance Abuse) Hospitals (Private)	3.1%	0.8%	4.2%	0.4%	*	1.1%	2.7%

Source: QCEW Employees - EMSI 2013.2 Class of Worker
Idaho Department of Labor Health Care Business Scan 2013

NAICS 623 Nursing and Residential Care Facilities

Nursing and residential care facilities accounted for the least health care employment regionally except in eastern and northern Idaho, where the share of employment was 10 percentage points higher than the state average. Southwestern Idaho had the smallest share in nursing care facilities at only 15.6 percent – almost five percentage points under the statewide average.

The detailed industry make up varied between regions. South central Idaho stood out to some degree with 14.8 percent of employment in nursing care facilities – more than 6 points above the state average.

Table 11: Percent of Health Care Employment within Nursing and Residential Care Facilities							
	Northern	North Central	Southwestern	South Central	Southeast	Eastern	Idaho
Nursing and Residential Care Facilities	31.3%	26.8%	15.6%	23.7%	21.9%	20.8%	20.2%
Nursing Care Facilities	11.8%	9.7%	7.0%	14.8%	10.1%	5.4%	8.7%
Residential Mental Retardation, Mental Health and Substance Abuse Facilities	4.0%	3.6%	2.4%	2.3%	6.0%	4.9%	3.3%
Community Care Facilities for the Elderly	11.8%	8.4%	5.1%	6.2%	3.9%	5.9%	6.1%
Other Residential Care Facilities	3.7%	5.1%	1.1%	0.4%	1.8%	4.5%	2.1%

Source: QCEW Employees - EMSI 2013.2 Class of Worker
Idaho Department of Labor Health Care Business Scan 2013

Occupation Analysis

The economy can be analyzed by industry or by occupation. The difference involves who is counted. Employment totals for health care industries include any jobs in that industry from doctors and nurses to janitors, accountants and secretaries. Occupations include people providing health care regardless of the industry. That includes not only doctors and nurses working in hospitals, but doctors and nurses working in public hospitals or in schools or for insurance companies or at industrial plants

By State

Under the Standard Occupations Classification system, two major groups were selected for health care employment – 29 Health Care Practitioners and Technical Occupations and 31 Health Care Support Occupations.

Due to its size, Idaho again was near the bottom in the percent of national health care occupational employment at four-tenths of a percent. Regionally Idaho was fifth above Montana and Wyoming. Washington ranked first in the region but only 20th in the country.

As a percentage of total occupational employment, Idaho improved slightly to 36th in the nation at 8.6 percent. Montana at 9.3 percent, ranking 27th, was the only border state with more of its total occupation employment in health care than the national average. The other border states ranked near the bottom with Nevada the lowest at 6.3 percent.

The past decade has been a strong one for health care occupations in Idaho and the surrounding states. All experience more than the national average growth. Since 2003, Idaho companies have expanded their health care jobs by 30.3 percent. This was enough to rank Idaho seventh in the country just above Nevada's 27.9 percent. Utah topped the region at 35.6 percent to rank second behind Arizona Washington and Oregon had the least growth for the region with 20.9 percent.

Based on EMSI's projections for 2023, Utah will top both the region and nation with projected growth of 31.9 percent. Idaho is second at 31.5 percent, and Oregon moves from 23rd to seventh with growth projected at 27.2 percent. Wyoming is the only other state in the region to have a projected growth above the national average of 21.2 percent. Montana, while having strong employment growth over the decade, is not projected to grow at nearly as strong of a pace, dropping to 50th with 13.2 percent growth.

Wages are a chief concern to many job seekers in a comparatively low-wage state like Idaho. But health care seems to be a bright spot not just for Idaho but many states in the region. Comparing a state's median wage for health care occupations to all occupations, Idaho ranked in the middle of the pack regionally. Nationally though, at 140.5 percent, Idaho ranked 12th. Nevada topped the country at 166.3 percent, Oregon was second and Montana seventh. The only state below the national average was Washington at 132 percent. That had more to do with the state's higher concentration of high-paid workers than a low wage for health care workers.

But a nationwide comparison of median wages for health care occupations, Idaho's \$24.16 was below the national median and ranked 35th. Also below the national median were Utah ranking 28th and Montana ranking 39th. Nevada and Oregon led the region with median wages over \$31 an hour. Washington ranked eighth.

Details for all the states and occupations are in Appendix 3 on page 23.

Table 12: Health Care Occupation Labor Force Metrics for Idaho and Surrounding States								
SIZE			RELATIVE SIZE			GROWTH		
Health Care Employment to Nation			Health Care Employment to State Employment			Growth in Health Care Employment		
Area	Percent	Rank	Area	Percent	Rank	Area	2003-2013	Rank
National	100.0%	-	Montana	9.3%	27	Utah	35.6%	2
Washington	1.9%	20	National	9.0%	-	Idaho	30.3%	7
Oregon	1.1%	30	Idaho	8.6%	36	Nevada	27.9%	8
Utah	0.8%	34	Washington	7.9%	43	Montana	25.0%	10
Nevada	0.6%	37	Oregon	7.8%	45	Wyoming	22.1%	20
Idaho	0.4%	41	Wyoming	7.4%	47	Oregon	20.9%	23
Montana	0.3%	45	Utah	7.3%	48	Washington	20.9%	24
Wyoming	0.2%	51	Nevada	6.3%	51	National	20.6%	-
PPROJECTED GROWTH			WAGE: MEDIAN					
Projected Growth in Health Care Employment			Health Care Wage to Total Wage			Health Care Median Wage		
Area	2013-2023	Rank	Area	Percent	Rank	Area	Wage	Rank
Utah	31.9%	1	Nevada	166.3%	1	Nevada	\$31.49	2
Idaho	31.5%	2	Oregon	157.1%	2	Oregon	\$31.48	3
Oregon	27.2%	7	Montana	143.1%	7	Washington	\$29.75	8
Wyoming	21.9%	21	Idaho	140.5%	12	Wyoming	\$26.76	20
National	21.2%	-	Utah	139.6%	14	National	\$26.53	-
Washington	19.7%	29	Wyoming	138.5%	17	Utah	\$25.72	28
Nevada	15.9%	44	National	132.8%	-	Idaho	\$24.16	35
Montana	13.2%	50	Washington	132.0%	29	Montana	\$23.68	39

Source: QCEW Employees - EMSI 2013.2 Class of Worker
Idaho Department of Labor Health Care Business Scan 2013

By Regional Occupation

Health care's occupational employment regionally in Idaho was similar to the industry employment. Southwestern Idaho made up the lion's share, and north central Idaho had the least. There was a small difference between the two. Northern Idaho accounted for 12.3 percent of occupational employment compared to 10.1 percent of industry employment.

Health care occupational employment made up a smaller piece of Idaho's total employment than health care industry employment, and the spread between regions was less than 2 percent compared to almost 4 percent with industry employment. Southwestern Idaho ranked first with 9.1 percent of all occupational employment in health care occupations, just slightly above north central Idaho's 9 percent. South central Idaho was last at 7.4 percent.

Health care occupational employment growth over the last decade was strong regionally, especially given the recession. Southwestern Idaho added the most jobs and had the largest growth rate at just over 50 percent. Eastern Idaho was next with 43 percent growth. The rest of Idaho's regions were below the state average of 40.6 percent with north central and southeastern Idaho the lowest.

EMSI's projected regional employment growth over the next decade in health care occupations is very similar with two exceptions. South central Idaho ranks first at 38.6 percent and north central Idaho ranks last at 21.3 percent. The other four regions are projected at between 31 percent and 32 percent.

Jobs in health care pay well in Idaho, particularly when compared to all other occupations. Eastern Idaho ranked last when it comes to relative wages for health care, but even then the median wage was over 25 percent higher than the median for all other occupations. Health care wages in northern Idaho were the highest at 53 percent over the median wage for all occupations.

Southwestern Idaho had the highest median wage at \$25.61 an hour followed by northern Idaho at \$25.08. The other regions were below the statewide average of \$24.16. South central was lowest at \$20.88 – more than \$2 per hour less than the fifth-ranked eastern Idaho.

Table 13: Idaho's Regional Health Care Occupation Labor Force Metrics — 2013

SIZE			RELATIVE SIZE			GROWTH		
Health Care Employment to State			Health Care Employment to Region Employment			Growth in Health Care Employment		
Area	Percent	Rank	Area	Percent	Rank	Area	2003-2013	Rank
Idaho	100.0%	-	Southwestern	9.1%	1	Southwestern	50.1%	1
Southwestern	48.3%	1	North Central	9.0%	2	Eastern	43.0%	2
Northern	12.3%	2	Northern	8.7%	3	Idaho	40.6%	-
Eastern	11.7%	3	Southeast	8.6%	4	Northern	35.5%	3
South Central	11.1%	4	Idaho	8.5%	-	South Central	32.8%	4
Southeast	9.3%	5	Eastern	7.8%	5	Southeast	29.4%	5
North Central	7.0%	6	South Central	7.4%	6	North Central	24.3%	6

PROJECTED GROWTH			WAGE: MEDIAN					
Projected Growth in Health Care Employment			Health Care Wage to Total Wage			Health Care Median Wage		
Area	2013-2023	Rank	Area	Percent	Rank	Area	Wage	Rank
South Central	38.6%	1	Northern	153.2%	1	Southwestern	\$25.61	1
Southeast	31.9%	2	Southeast	143.5%	2	Northern	\$25.08	2
Northern	31.7%	3	Idaho	140.5%	-	Idaho	\$24.16	-
Eastern	31.7%	4	Southwestern	140.4%	3	Southeast	\$23.50	3
Idaho	31.5%	-	North Central	138.2%	4	North Central	\$23.50	4
Southwestern	31.2%	5	South Central	135.1%	5	Eastern	\$22.99	5
North Central	21.3%	6	Eastern	125.4%	6	South Central	\$20.88	6

Source: QCEW Employees - EMSI 2013.2 Class of Worker
Idaho Department of Labor Health Care Business Scan 2013

Detailed Occupations - Idaho

29-1000 Health Diagnosing and Treating Practitioners

Health diagnosing and treating practitioners include most occupational classifications among minor health care groups, accounting for nearly 40 percent of employment. This minor group covers the occupations of doctors and nurses so it also had the highest wages.

Registered nurses made up the bulk this occupational group's employment and the majority of all health care occupations at 24 percent. Registered nurses are also projected to increase the most over the next decade, adding more than 4,500 more jobs by 2023, about 36 percent. But physical, respiratory and occupational therapists are projected to grow at a faster rate – between 40 percent and 45 percent.

Table 14: Health Diagnosing and Treating Practitioners

	2013	2003-2013	2013-2023	Median Wage
Health Diagnosing and Treating Practitioners	20,931	5,076	6,828	\$38.61
Registered Nurses	12,660	3,404	4,553	\$28.24
Pharmacists	1,466	380	353	\$52.13
Physical Therapists	1,031	373	408	\$34.28
Physicians and Surgeons, All Other	883	60	195	\$105.26
Physician Assistants	706	158	108	\$42.96
Dentists, General	497	(5)	68	\$90.00
Respiratory Therapists	491	157	223	\$25.55
Veterinarians	452	98	133	\$33.88
Occupational Therapists	438	134	188	\$32.24
Speech-Language Pathologists	404	82	131	\$28.91

Source: QCEW Employees - EMSI 2013.2 Class of Worker
Idaho Department of Labor Health Care Business Scan 2013

29-2000 Health Technologists and Technicians

Health technologists made up the second largest group of occupations and the second largest portion of Idaho's health care employment at 24 percent. Average wages in this group were third among the health care groups at \$19.52 an hour.

The occupation with the most employment was licensed practical and licensed vocational nurses. With close to 3,000 in Idaho, they are 75 percent more common than the next largest in this group, pharmacy technicians. The number of veterinary technologists expanded by 35 percent since 2003 and is projected to grow over 46 percent by 2023. While this only equates to 177 jobs through 2013 and another 233 jobs through 2023, it is the fastest growing among the top 10 occupations in this group. It also had the lowest average median wage at \$12.57 an hour. Dental hygienists came in with the highest hourly median wage of \$34.11.

Table 15: Health Technologists and Technicians

	2013	2003-2013	2013-2023	Median Wage
Health Technologists and Technicians	12,714	2,903	3,668	\$19.52
Licensed Practical and Licensed Vocational Nurses	2,968	497	775	\$18.22
Pharmacy Technicians	1,673	446	456	\$14.11
Dental Hygienists	1,184	260	344	\$34.11
Radiologic Technologists and Technicians	1,081	317	359	\$24.46
Medical Records and Health Information Technicians	1,075	235	229	\$14.47
Emergency Medical Technicians and Paramedics	917	338	358	\$14.67
Medical and Clinical Laboratory Technologists	635	98	131	\$26.98
Surgical Technologists	554	167	150	\$18.47
Veterinary Technologists and Technicians	505	177	233	\$12.57
Medical and Clinical Laboratory Technicians	403	27	123	\$14.23

Source: QCEW Employees - EMSI 2013.2 Class of Worker
Idaho Department of Labor Health Care Business Scan 2013

31-1000 Nursing, Psychiatric and Home Health Aides

Nursing, psychiatric and home health aides make up another minor group that has only three occupations. But this group accounted for the third largest portion of health care occupational employment at 22 percent. This group also has the lowest wage by a considerable margin. The median was \$10.25 an hour.

Nursing aides, orderlies and attendants made up the bulk of this group with over 7,500 jobs in Idaho. Psychiatric aids accounted for the least employment at more than 300. They are also expected to grow more slowly compared to the other two occupations, increasing only 14 percent by 2023. In contrast, home health aides are projected to increase almost 66 percent during the same 10 years.

Table 16: Health Technologists and Technicians				
	2013	2003-2013	2013-2023	Median Wage
Nursing, Psychiatric and Home Health Aides	11,988	3,282	4485	\$10.25
Nursing Aides, Orderlies and Attendants	7,546	1,382	1,724	\$10.89
Home Health Aides	4,134	1,899	2,719	\$9.04
Psychiatric Aides	308	2	42	\$9.46

Source: QCEW Employees - EMSI 2013.2 Class of Worker
Idaho Department of Labor Health Care Business Scan 2013

31-2000 Occupational Therapy and Physical Therapist Assistants and Aides

Occupational therapy and physical therapist assistants and aides had the smallest employment of the occupational groups, accounting for just 1.6 percent. Wages for this group were in the middle with a median wage of \$16.85.

Physical therapy aides accounted for the most employment at 327. But by 2023, physical therapy assistants are projected to pass them by one job. That could boost the median wage for the group since assistants made almost \$11 an hour more than aides.

Table 17: Occupational Therapy and Physical Therapist Assistants and Aides				
	2013	2003-2013	2013-2023	Median Wage
Occupational Therapy and Physical Therapist Assistants and Aides	835	372	350	\$16.85
Physical Therapist Aides	327	118	116	\$10.74
Physical Therapist Assistants	295	109	149	\$21.43
Occupational Therapy Assistants	138	58	64	\$27.04
Occupational Therapy Aides	75	30	20	\$8.54

Source: QCEW Employees - EMSI 2013.2 Class of Worker
Idaho Department of Labor Health Care Business Scan 2013

29-9000 Other Health Care Practitioners and Technical Occupations/ 31-9000 Other Health Care Support Occupations

These are residual groups, containing occupations that do not fit into the other minor groups. These two groups are quite different with other health care practitioners and technical occupations containing fewer, but considerably better-paying, occupations. The other health care practitioners and technical occupations group ranked second in wages while the residual for support occupations contained almost 12 percent of Idaho health care employment.

Medical and dental assistants made up the lion's share of employment for both groups at almost 4,400 jobs combined. These occupations are also expected to increase the most, adding almost 1,000 jobs by 2023. Occupational health and safety specialists are top paid at \$29.78 an hour at the median.

Table 18: Residual Health Care Occupation Minor Groups

	2013	2003-2013	2013-2023	Median Wage
Other Health Care Practitioners and Technical Occupations	720	128	142	\$26.68
Occupational Health and Safety Specialists	399	44	41	\$29.78
Health Care Practitioners and Technical Workers, All Other	150	28	57	\$27.21
Athletic Trainers	135	50	36	\$19.13
Occupational Health and Safety Technicians	36	6	9	\$17.37
Other Health Care Support Occupations	6,423	774	1,410	\$13.91
Medical Assistants	2,364	313	510	\$13.76
Dental Assistants	2,014	274	449	\$14.39
Massage Therapists	220	61	73	\$17.44
Medical Transcriptionists	625	5	2	\$14.82
Health Care Support Workers, All Other	511	81	204	\$13.25
Veterinary Assistants and Laboratory Animal Caretakers	302	(42)	61	\$9.51
Medical Equipment Preparers	240	59	73	\$13.42
Pharmacy Aides	147	24	37	\$12.35

Source: QCEW Employees - EMSI 2013.2 Class of Worker
Idaho Department of Labor Health Care Business Scan 2013

Hot Jobs

Due to the combination of strong growth rates and higher salaries, many health care occupations are on the Idaho Department of Labor's Hot Jobs list. This list ranks occupations based on their abundance in the economy, growth rate and pay. Of the 100 hot occupations, health care claims 24 – more than any other group. Nine of the 24 are in the top 15, and the top occupation for several years has been registered nurse.

Table 19: 2010-2020 Hot Jobs in Health Care for Idaho

Rank	Title	Rank	Title
1	Registered Nurses	50	Medical Assistants
3	Physical Therapists	51	Surgeons
4	Dental Hygienists	52	Diagnostic Medical Sonographers
5	Pharmacists	64	Medical and Clinical Laboratory Technologists
8	Physicians and Surgeons, All Other	67	Nursing Aides, Orderlies, and Attendants
11	Radiologic Technologists and Technicians	69	Home Health Aides
12	Family and General Practitioners	70	Speech-Language Pathologists
13	Physician Assistants	74	Dental Assistants
14	Licensed Practical and Licensed Vocational Nurses	81	Dentists, General
21	Veterinarians	85	Pharmacy Technicians
24	Occupational Therapists	87	Internists, General
30	Respiratory Therapists	99	Surgical Technologists

Source: Idaho Department of Labor
 Idaho Department of Labor Health Care Business Scan 2013

APPENDIX 1 – DATA SOURCES

IN-HOUSE DATA

The Idaho Department of Labor has in-house data available for analysis from the Quarterly Census of Employment and Wages, Occupational Employment Statistics and occupational and industry projections. The quarterly census data come from employers who pay unemployment insurance taxes and are referred to as covered employment data. They provide numbers of establishments, employment and earnings by industry. The Occupational Employment Statistics program develops the wage survey publication. It provides data on employment and wages by occupations and information to determine staffing patterns. Projections are developed statewide and by region for the short term – two years – and the long term – 10 years. These data allow the Department of Labor to conduct numerous industry and occupational analyses for Idaho and its regions. There are limitations, however. The quarterly census and the occupational statistics include only jobs covered by the unemployment insurance system, which are about 90 percent of total jobs. There is a lack of readily available information for state-to-state comparisons. There are strict confidentiality rules on the use of both quarterly census and occupational data. This means that even though Idaho Labor might have data, the information cannot be released if there is a chance that an individual or business could be identified.

PURCHASED DATA

Idaho Labor contracts with Economic Modeling Specialists International for industry and occupational estimates for all 50 states. To estimate industry data, EMSI “combines covered employment data from Quarterly Census of Employment and Wages produced by the Department of Labor with total employment data in the Regional Economic Information System published by the U.S. Bureau of Economic Analysis, augmented with County Business Patterns and Nonemployer Statistics published by the U.S. Census Bureau.” EMSI bases occupation estimates “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” conducted by the U.S. Census Bureau.

EMSI data are not subject to the same confidentiality requirements as the department’s in-house data.

TYPES OF DATA

OCCUPATION AND INDUSTRY

The health care industry in Idaho can be measured by occupation and industry. Occupational data includes employment and wages for specific occupations. For example, “29-1111 Registered Nurses” would count all registered nurses whether working in a typical health care setting such as a hospital or a non-health-care industry such as manufacturing. Sometimes multiple job titles are grouped in one occupation. Industry information also tracks employment and earnings along with establishments. But it includes every occupation in the industry even if not directly related to the industry. For example, data on an establishment identified in the hospital industry would include not just the actual health care workers but all the accountants, secretaries, maintenance personnel and others. Thus, a health care industry will have both health care and non-health-care occupations.

WHY HAVE TWO MEASURES?

Occupation information gives what is often referred to as a “workforce-oriented” view. This information allows stakeholders such as institutions of higher education to identify occupational shortages or specific occupation needs and to develop career ladders or paths of advancement for a specific career.

Industry information can be useful to economic developers. It provides a wide-angle view of the makeup of an economy and is therefore useful in identifying industry clusters or businesses that may cluster with other similar or supportive industries. This kind of measure allows economic developers to target the identified industries that offer higher wages because wages can be higher at every occupational level for an entire industry. For businesses willing to relocate entirely rather than move only a few occupations, this wide-angle view can be very useful.

ESTABLISHMENTS, EMPLOYMENT, EARNINGS AND WAGES

An establishment is a single location for an employer. A single employer may have more than one establishment such as a retailer who may be under one company with several locations around the state. Establishments under one company may be assigned to different industry or North American Industry Classification System codes depending on their specific function.

Employment is a count of people working and does not differentiate between full time, part time or people who work multiple jobs. Earnings for this business scan include either EMSI’s earnings per worker calculation, which includes estimated benefits, or the quarterly census information on total wages paid by employers to employees. Wages for this business scan include EMSI’s estimates on median hourly wage and the hourly wage estimates provided by Occupational Employment Statistics.

METHODOLOGY

In defining the health care industry and health care occupations, a simple approach was used. Three health care subsectors – or three-digit industries as defined by the North American Industry Classification System that make up the ‘health care’ portion of classification 62 – Health Care and Social Assistants – were used for industries. These three industries – 621 Ambulatory Health Care Services, 622 Hospitals (Private), 623 Nursing and Residential Care Facilities – encompass the majority of all private health care employment. Other industries, specifically in medical device manufacturing and public hospitals, were considered as possible additions to this taxonomy but were rejected for a several reasons. Manufacturers, while vital to providing equipment to health care companies, can be hard to distinguish based on their industry classification without doing a survey, which was outside the scope of this project. Rather than pick a few industries that were easily distinguished and leaving the others out, the focus was placed on the three traditional health care industries. Public employment was left out because its staffing levels can be affected by different variables than its private counterparts. However, this industry does provide ample health care occupation employment so it was included in the occupational analysis.

The occupational analysis also took a simple approach by choosing the two two-digit Standard Occupation Classification most associated with health care - 29 Health Care Practitioners and Technical Occupations and 31 Health Care Support Occupations.

APPENDIX 2 – Health Care Industry Labor Force Metric

SIZE			RELATIVE SIZE			GROWTH			EARNINGS			EARNINGS TO STATE			RELATIVE ESTABLISHMENTS											
Health Care Employment to Nation			Health Care Employment to State Employment			Health Care Employment to State Population			Growth in Health Care Employment			Projected Growth of Health Care Employment			Health Care Average Earnings			Earnings Ratio - State Health Care to State Total			Health Care Establishments to Total Establishments					
Area	Percent	Rank	Area	Percent	Rank	Area	Percent	Rank	Area	2003-2013	Rank	Area	2013-2023	Rank	Area	Earnings	Rank	Area	Percent	Rank	Area	Percent	Rank			
National	100.0%	-	Rhode Island	15.3%	1	Delaware	7.8%	1	Arizona	49.2%	1	Utah	35.7%	1	DC	\$73,043	1	Nevada	129.4%	1	Oklahoma	9.3%	1			
California	9.2%	1	West Virginia	14.3%	2	North Dakota	6.7%	2	Idaho	45.9%	2	Idaho	35.5%	2	California	\$71,643	2	South Dakota	125.1%	2	West Virginia	9.0%	2			
Texas	7.8%	2	Maine	14.2%	3	Massachusetts	6.7%	3	Alaska	44.9%	3	Alaska	32.9%	3	Massachusetts	\$69,370	3	Hawaii	125.1%	3	New Jersey	8.9%	3			
New York	7.2%	3	Pennsylvania	14.1%	4	Rhode Island	6.4%	4	Utah	41.0%	4	Texas	32.5%	4	Nevada	\$68,517	4	Mississippi	118.3%	4	Maryland	8.8%	4			
Florida	6.0%	4	Massachusetts	13.9%	5	Minnesota	6.2%	5	Delaware	40.0%	5	Colorado	32.3%	5	Hawaii	\$67,972	5	Montana	117.1%	5	Arizona	8.8%	5			
Pennsylvania	5.3%	5	Ohio	13.4%	6	Maine	6.2%	6	Texas	37.8%	6	Alabama	32.0%	6	Delaware	\$66,533	6	Maine	116.4%	6	Michigan	8.7%	6			
Ohio	4.6%	6	Minnesota	13.1%	7	South Dakota	6.1%	7	Nevada	34.1%	7	Virginia	31.3%	7	Connecticut	\$65,860	7	Florida	115.6%	7	Texas	8.6%	7			
Illinois	4.2%	7	South Dakota	13.1%	8	Pennsylvania	6.0%	8	Colorado	31.5%	8	South Carolina	31.3%	8	New Hampshire	\$64,948	8	South Carolina	115.6%	8	Pennsylvania	8.6%	8			
Michigan	3.4%	8	Connecticut	13.0%	9	Vermont	5.9%	9	Georgia	30.7%	9	New Mexico	29.9%	9	New Jersey	\$63,835	9	Tennessee	113.8%	9	Tennessee	8.5%	9			
Massachusetts	3.1%	9	Michigan	12.7%	10	Connecticut	5.7%	10	Tennessee	29.7%	10	Arizona	29.7%	10	Washington	\$63,547	10	Washington	113.4%	10	Ohio	8.4%	10			
New Jersey	3.1%	10	Delaware	12.6%	11	Ohio	5.7%	11	Virginia	28.7%	11	Oregon	29.7%	11	New York	\$62,937	11	Vermont	113.0%	11	Florida	8.4%	11			
North Carolina	2.8%	11	Vermont	12.6%	12	DC	5.4%	12	Minnesota	28.7%	12	Minnesota	29.2%	12	Alaska	\$62,647	12	Wisconsin	112.9%	12	Nevada	8.0%	12			
Georgia	2.5%	12	New York	12.3%	13	New Hampshire	5.4%	13	Montana	28.0%	13	Indiana	28.5%	13	Maryland	\$62,426	13	Kentucky	112.2%	13	Alabama	8.0%	13			
Minnesota	2.4%	13	Montana	12.2%	14	Wisconsin	5.3%	14	North Carolina	27.7%	14	Wyoming	27.5%	14	Arizona	\$61,946	14	Nebraska	112.2%	14	Rhode Island	7.9%	14			
Virginia	2.3%	14	Missouri	12.1%	15	West Virginia	5.3%	15	Maryland	27.0%	15	DC	27.0%	15	Colorado	\$60,973	15	Oregon	112.0%	15	Louisiana	7.8%	15			
Indiana	2.2%	15	New Hampshire	12.1%	16	Nebraska	5.3%	16	Florida	26.6%	16	Kansas	26.1%	16	Oregon	\$60,853	16	Arizona	111.9%	16	Hawaii	7.7%	16			
Missouri	2.1%	16	Maryland	12.1%	17	New York	5.2%	17	New Mexico	25.5%	17	Oklahoma	26.1%	17	Minnesota	\$60,782	17	Idaho	109.7%	17	Kentucky	7.7%	17			
Wisconsin	2.1%	17	Florida	12.0%	18	Montana	5.0%	18	South Carolina	25.3%	18	Georgia	26.1%	18	Tennessee	\$60,524	18	Arkansas	109.2%	18	Idaho	7.7%	18			
Tennessee	2.1%	18	New Jersey	11.9%	19	Missouri	5.0%	19	Wyoming	24.5%	19	Delaware	25.9%	19	National	\$59,797	-	Missouri	107.8%	19	Connecticut	7.7%	19			
Maryland	2.1%	19	Indiana	11.5%	20	Michigan	4.9%	20	Oregon	24.1%	20	Maryland	25.6%	20	Virginia	\$59,692	19	Indiana	107.5%	20	Oregon	7.7%	20			
Arizona	1.9%	20	Tennessee	11.4%	21	Maryland	4.9%	21	DC	24.0%	21	Kentucky	25.3%	21	Georgia	\$59,523	20	Alabama	107.1%	21	Mississippi	7.6%	21			
Washington	1.9%	21	Wisconsin	11.4%	22	Kansas	4.9%	22	South Dakota	23.8%	22	Mississippi	23.4%	22	Pennsylvania	\$59,464	21	Georgia	107.1%	22	New York	7.5%	22			
Colorado	1.4%	22	Kentucky	11.2%	23	New Jersey	4.9%	23	Washington	23.4%	23	Washington	23.4%	23	Massachusetts	23.0%	23	Florida	\$59,276	22	New Mexico	106.9%	23	Alaska	7.5%	23
Connecticut	1.4%	23	Arizona	11.2%	24	Iowa	4.8%	24	Massachusetts	23.3%	24	California	23.0%	24	California	\$58,835	23	Delaware	106.9%	24	Arkansas	7.4%	24			
Louisiana	1.4%	24	North Dakota	11.1%	25	Indiana	4.8%	25	Indiana	23.1%	25	New Hampshire	22.9%	25	Michigan	\$58,258	24	California	105.7%	25	New Mexico	7.3%	25			
Kentucky	1.4%	25	Illinois	11.0%	26	Illinois	4.7%	26	National	23.0%	-	National	22.7%	-	Vermont	\$58,137	25	Wyoming	105.1%	26	South Carolina	7.3%	26			
Alabama	1.2%	26	Nebraska	10.9%	27	Tennessee	4.6%	27	Missouri	22.4%	26	Tennessee	22.2%	26	Wisconsin	\$58,102	26	North Carolina	104.6%	27	North Carolina	7.3%	27			
Oregon	1.2%	27	Arkansas	10.9%	28	National	4.5%	-	California	22.3%	27	Louisiana	21.7%	27	Wyoming	\$57,544	27	West Virginia	103.8%	28	Georgia	7.2%	28			
Oklahoma	1.1%	28	Kansas	10.9%	29	Kentucky	4.5%	28	North Dakota	21.6%	28	Ohio	21.6%	28	South Dakota	\$56,443	28	Kansas	102.7%	29	Illinois	7.2%	29			
South Carolina	1.0%	29	National	10.9%	-	Alaska	4.4%	29	New Hampshire	21.3%	29	Wisconsin	21.4%	29	Kentucky	\$56,420	29	Minnesota	102.4%	30	Utah	7.1%	30			
Iowa	1.0%	30	Louisiana	10.6%	30	Florida	4.4%	30	New Jersey	19.6%	30	Iowa	20.9%	30	North Dakota	\$56,027	30	Iowa	101.9%	31	Colorado	7.0%	31			
Kansas	1.0%	31	Idaho	10.6%	31	Oregon	4.4%	31	New York	18.7%	31	Washington	20.6%	31	Washington	20.6%	31	Alabama	\$55,795	31	Michigan	101.9%	32	Indiana	7.0%	32
Arkansas	0.9%	32	Oregon	10.5%	32	Louisiana	4.3%	32	Alabama	18.4%	32	New York	20.0%	32	New York	\$55,569	32	Oklahoma	101.6%	33	Maine	7.0%	33			
Utah	0.8%	33	Texas	10.5%	33	Texas	4.2%	33	Illinois	17.3%	33	Hawaii	19.7%	33	Rhode Island	\$55,468	33	Pennsylvania	101.6%	34	Missouri	6.9%	34			
Mississippi	0.7%	34	New Mexico	10.5%	34	Oklahoma	4.1%	34	Nebraska	17.2%	34	North Carolina	19.5%	34	Maine	\$55,319	34	Colorado	101.0%	35	National	6.9%	-			
Nebraska	0.7%	35	Alaska	10.5%	35	Arkansas	4.1%	35	Arkansas	17.1%	35	West Virginia	19.4%	35	South Carolina	\$55,261	35	North Dakota	100.8%	36	Iowa	6.7%	35			
West Virginia	0.7%	36	Oklahoma	10.4%	36	Arizona	4.1%	36	Oklahoma	17.1%	36	Michigan	19.0%	36	Texas	\$54,681	36	Washington	99.8%	37	Kansas	6.6%	36			
Maine	0.6%	37	North Carolina	10.3%	37	Virginia	4.1%	37	Mississippi	17.0%	37	Connecticut	18.8%	37	Montana	\$54,421	37	National	99.6%	-	Nebraska	6.6%	37			
Nevada	0.6%	38	Iowa	10.1%	38	North Carolina	4.0%	38	Michigan	16.6%	38	Florida	18.6%	38	Indiana	\$54,377	38	Ohio	99.1%	38	Wisconsin	6.6%	38			
New Mexico	0.6%	39	Alabama	9.7%	39	Idaho	4.0%	39	Ohio	16.5%	39	South Dakota	18.5%	39	North Carolina	\$54,283	39	Alaska	97.7%	39	Minnesota	6.4%	39			
New Hampshire	0.5%	40	Georgia	9.6%	40	Washington	3.9%	40	Hawaii	16.4%	40	North Dakota	18.5%	40	New Mexico	\$54,233	40	Louisiana	97.6%	40	New Hampshire	6.4%	40			
Rhode Island	0.5%	41	Mississippi	9.5%	41	Utah	3.9%	41	West Virginia	16.4%	41	Nevada	18.3%	41	Nebraska	\$53,595	41	Utah	97.2%	41	Delaware	6.4%	41			
Idaho	0.5%	42	Virginia	9.3%	42	Colorado	3.9%	42	Kentucky	16.0%	42	Maine	17.5%	42	Ohio	\$53,236	42	Rhode Island	96.7%	42	Virginia	6.3%	42			
South Dakota	0.4%	43	Washington	9.3%	43	New Mexico	3.8%	43	Wisconsin	15.6%	43	Rhode Island	16.8%	43	Mississippi	\$52,734	43	Massachusetts	95.8%	43	Massachusetts	6.2%	43			
Montana	0.4%	44	Colorado	9.0%	44	Alabama	3.6%	44	Kansas	15.5%	44	Nebraska	16.2%	44	Oklahoma	\$52,304	44	Virginia	95.5%	44	Montana	5.9%	44			
Delaware	0.3%	45	California	9.0%	45	Georgia	3.5%	45	Pennsylvania	15.4%	45	Missouri	16.0%	45	Kansas	\$51,936	45	Maryland	94.7%	45	California	5.8%	45			
DC	0.3%	46	Utah	8.9%	46	California	3.4%	46	Vermont	14.7%	46	Illinois	15.4%	46	Louisiana	\$51,660	46	Illinois	93.1%	46	South Dakota	5.7%	46			
North Dakota	0.3%	47	South Carolina	8.5%	47	Hawaii	3.3%	47	Rhode Island	13.4%	47	New Jersey	14.8%	47	West Virginia	\$51,485	47	West Virginia	91.1%	47	Vermont	5.7%	47			
Hawaii	0.3%	48	Hawaii	7.8%	48	Mississippi	3.3%	48	Connecticut	13.1%	48	Pennsylvania	14.8%	48	Arkansas	\$51,435	48	Arkansas	90.7%	48	Washington	5.5%	48			
Vermont	0.3%	49	Nevada	7.1%	49	South Carolina	3.2%	49	Iowa	12.2%	49	Montana	14.1%	49	Montana	\$51,035	49	Iowa	88.4%	49	Wyoming	5.5%	49			
Alaska	0.2%	50	DC	7.0%	50	Wyoming	3.0%	50	Maine	12.2%	50	Vermont	12.8%	50	Utah	\$49,578	50	New York	84.2%	50	North Dakota	4.9%	50			
Wyoming	0.1%	51	Wyoming	6.4%	51	Nevada	2.9%	51	Louisiana	11.3%	51	Arkansas	11.2%	51	Idaho	\$49,212	51	DC	69.4%	51	DC	3.9%	51			

Source: QCEW Employees - EMSI 2013.2 Class of Worker

Idaho Department of Labor Health Care Business Scan 2013

APPENDIX 3 – Health Care Industry Labor Force Metric

SIZE			RELATIVE SIZE			GROWTH IN EMPLOYMENT			WAGE: MEDIAN								
Health Care Employment to Nation			Health Care Employment to State Employment			Growth in Health Care Employment			Projected Growth in Health Care Employment			Health Care Wage to Total Wage			Health Care Median Wage		
Area	Percent	Rank	Area	Percent	Rank	Area	2003-2013	Rank	Area	2013-2023	Rank	Area	Percent	Rank	Area	Wage	Rank
National	100.0%	-	Rhode Island	11.8%	1	Arizona	41.9%	1	Utah	31.9%	1	Nevada	166.3%	1	Alaska	\$34.11	1
California	9.6%	1	West Virginia	11.5%	2	Utah	35.6%	2	Idaho	31.5%	2	Oregon	157.1%	2	Nevada	\$31.49	2
Texas	7.6%	2	Ohio	11.1%	3	Alaska	33.1%	3	Texas	30.4%	3	Hawaii	153.1%	3	Oregon	\$31.48	3
New York	7.0%	3	Maine	11.0%	4	Delaware	32.5%	4	Colorado	30.0%	4	Vermont	152.0%	4	California	\$31.36	4
Florida	5.7%	4	Massachusetts	10.6%	5	Colorado	31.8%	5	Alaska	29.8%	5	Alaska	144.4%	5	Hawaii	\$31.04	5
Pennsylvania	4.7%	5	Michigan	10.6%	6	Texas	31.0%	6	Arizona	28.9%	6	Arizona	143.9%	6	Massachusetts	\$30.98	6
Ohio	4.6%	6	Mississippi	10.4%	7	Idaho	30.3%	7	Oregon	27.2%	7	Montana	143.1%	7	Maryland	\$30.09	7
Illinois	4.2%	7	Pennsylvania	10.3%	8	Nevada	27.9%	8	Virginia	27.1%	8	South Dakota	142.4%	8	Washington	\$29.75	8
Michigan	3.4%	8	Missouri	10.2%	9	North Carolina	27.4%	9	Minnesota	26.6%	9	Florida	142.3%	9	Delaware	\$29.72	9
North Carolina	3.3%	9	North Carolina	10.0%	10	Montana	25.0%	10	New Mexico	26.4%	10	Maine	141.1%	10	Connecticut	\$29.66	10
Massachusetts	2.9%	10	Minnesota	9.9%	11	Tennessee	24.9%	11	Alabama	26.3%	11	New Mexico	140.8%	11	DC	\$29.59	11
New Jersey	2.9%	11	Arkansas	9.9%	12	Georgia	23.9%	12	Indiana	25.5%	12	Idaho	140.5%	12	New Jersey	\$29.41	12
Georgia	2.6%	12	New York	9.9%	13	Virginia	23.9%	13	South Carolina	24.9%	13	Kentucky	140.0%	13	Vermont	\$29.07	13
Virginia	2.4%	13	Tennessee	9.8%	14	Maryland	23.6%	14	Kentucky	23.5%	14	Utah	139.6%	14	Arizona	\$28.17	14
Indiana	2.3%	14	South Dakota	9.8%	15	South Dakota	23.3%	15	Maryland	23.3%	15	Wisconsin	139.5%	15	New York	\$28.04	15
Minnesota	2.2%	15	Delaware	9.8%	16	South Carolina	22.8%	16	South Carolina	23.3%	16	South Carolina	139.2%	16	New Hampshire	\$28.01	16
Missouri	2.2%	16	Louisiana	9.7%	17	North Dakota	22.7%	17	Georgia	23.2%	17	Wyoming	138.5%	17	Colorado	\$27.92	17
Tennessee	2.2%	17	Indiana	9.7%	18	New Mexico	22.6%	18	Delaware	22.8%	18	Delaware	138.4%	18	Rhode Island	\$27.86	18
Wisconsin	2.1%	18	Connecticut	9.6%	19	Minnesota	22.2%	19	Oklahoma	22.5%	19	Mississippi	137.6%	19	Minnesota	\$27.29	19
Maryland	2.0%	19	Kentucky	9.5%	20	Wyoming	22.1%	20	New Hampshire	22.3%	20	New Hampshire	137.2%	20	Wyoming	\$26.76	20
Washington	1.9%	20	Wisconsin	9.5%	21	New Hampshire	21.2%	21	Wyoming	21.9%	21	California	137.1%	21	Virginia	\$26.58	21
Arizona	1.7%	21	Maryland	9.5%	22	Arkansas	21.1%	22	California	21.9%	22	Georgia	136.1%	22	National	\$26.53	-
Colorado	1.5%	22	Alabama	9.5%	23	Oregon	20.9%	23	Massachusetts	21.7%	23	Tennessee	136.0%	23	Illinois	\$26.34	22
Louisiana	1.5%	23	Florida	9.4%	24	Washington	20.9%	24	National	21.2%	-	Arkansas	136.0%	24	Wisconsin	\$26.15	23
Alabama	1.4%	24	Oklahoma	9.4%	25	Massachusetts	20.6%	25	Iowa	21.2%	24	West Virginia	135.8%	25	New Mexico	\$25.94	24
Kentucky	1.4%	25	Kansas	9.4%	26	National	20.6%	-	Louisiana	20.8%	25	Nebraska	135.7%	26	Georgia	\$25.92	25
South Carolina	1.4%	26	Montana	9.3%	27	California	20.1%	26	Mississippi	20.4%	26	Indiana	135.3%	27	Florida	\$25.78	26
Connecticut	1.3%	27	South Carolina	9.3%	28	Florida	19.4%	27	Ohio	19.9%	27	Iowa	133.5%	28	Maine	\$25.77	27
Oklahoma	1.2%	28	New Hampshire	9.2%	29	Indiana	18.9%	28	DC	19.7%	28	National	132.8%	-	Utah	\$25.72	28
Iowa	1.1%	29	New Jersey	9.2%	30	Missouri	18.8%	29	Washington	19.7%	29	Washington	132.0%	29	Pennsylvania	\$25.22	29
Oregon	1.1%	30	Vermont	9.1%	31	Mississippi	18.4%	30	Connecticut	19.4%	30	Colorado	131.3%	30	Michigan	\$25.14	30
Kansas	1.0%	31	Nebraska	9.0%	32	Kentucky	18.2%	31	New York	19.2%	31	Missouri	131.2%	31	Texas	\$24.84	31
Arkansas	0.9%	32	Illinois	9.0%	33	New York	18.0%	32	Tennessee	19.1%	32	Alabama	130.8%	32	Ohio	\$24.27	32
Mississippi	0.9%	33	New Mexico	9.0%	34	Pennsylvania	17.9%	33	West Virginia	18.8%	33	Minnesota	130.2%	33	Kentucky	\$24.23	33
Utah	0.8%	34	National	9.0%	-	DC	17.6%	34	Wisconsin	18.7%	34	Kansas	130.0%	34	Indiana	\$24.20	34
Nebraska	0.7%	35	Iowa	8.8%	35	Illinois	17.6%	35	North Dakota	18.5%	35	Oklahoma	129.8%	35	Idaho	\$24.16	35
West Virginia	0.7%	36	Idaho	8.6%	36	West Virginia	17.5%	36	Florida	18.3%	36	Texas	129.7%	36	South Carolina	\$24.14	36
Nevada	0.6%	37	North Dakota	8.6%	37	New Jersey	17.3%	37	Maine	17.7%	37	Rhode Island	129.5%	37	Nebraska	\$23.85	37
New Mexico	0.6%	38	Texas	8.4%	38	Hawaii	16.8%	38	Michigan	17.7%	38	Louisiana	129.3%	38	Tennessee	\$23.72	38
Maine	0.5%	39	Arizona	8.3%	39	Ohio	16.2%	39	North Carolina	17.6%	39	Maryland	129.1%	39	Montana	\$23.68	39
New Hampshire	0.5%	40	Georgia	8.1%	40	Michigan	15.7%	40	South Dakota	17.6%	40	Ohio	129.0%	40	North Carolina	\$23.68	40
Idaho	0.4%	41	Virginia	8.0%	41	Alabama	15.6%	41	Hawaii	17.4%	41	Illinois	128.0%	41	Missouri	\$23.65	41
Rhode Island	0.4%	42	Colorado	8.0%	42	Nebraska	15.4%	42	Rhode Island	16.4%	42	North Carolina	127.7%	42	Iowa	\$23.43	42
DC	0.4%	43	Washington	7.9%	43	Iowa	15.3%	43	Vermont	16.5%	43	Michigan	127.7%	43	Kansas	\$23.35	43
Hawaii	0.4%	44	Alaska	7.9%	44	Oklahoma	15.3%	44	Nevada	15.9%	44	Pennsylvania	127.2%	44	Alabama	\$23.28	44
Montana	0.3%	45	Oregon	7.8%	45	Vermont	15.3%	45	Illinois	15.3%	45	North Dakota	126.9%	45	South Dakota	\$23.09	45
South Dakota	0.3%	46	California	7.8%	46	Wisconsin	14.4%	46	Pennsylvania	15.3%	46	Massachusetts	126.5%	46	Louisiana	\$22.57	46
Delaware	0.3%	47	Wyoming	7.4%	47	Kansas	14.0%	47	Nebraska	15.1%	47	New Jersey	126.2%	47	North Dakota	\$22.30	47
North Dakota	0.3%	48	Utah	7.3%	48	Maine	13.4%	48	Missouri	14.6%	48	Connecticut	125.5%	48	Arkansas	\$22.25	48
Vermont	0.2%	49	Hawaii	7.1%	49	Connecticut	12.5%	49	New Jersey	14.5%	49	Virginia	121.2%	49	West Virginia	\$22.16	49
Alaska	0.2%	50	DC	6.7%	50	Rhode Island	11.6%	50	Montana	13.2%	50	New York	120.2%	50	Oklahoma	\$22.12	50
Wyoming	0.2%	51	Nevada	6.3%	51	Louisiana	10.0%	51	Arkansas	11.9%	51	DC	87.5%	51	Mississippi	\$21.61	51

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