



Pennsylvania defines industry clusters to serve as the basis for data-driven workforce development policies. An industry cluster includes industries closely linked by common products, labor pools, technologies, supplier chains and training needs. They take on strategic importance for long-term economic planning as changes that benefit one group member will generally impact other members of the cluster.

Industry clusters are comprised of specific six-digit North American Industry Classification System, or NAICS, codes. They are mutually exclusive, so that no two clusters contain the same NAICS code. Currently, there are 12 clusters identified, along with several critical sub-clusters. Combined, these 12 industry clusters account for nearly 85 percent of all employment in the commonwealth.

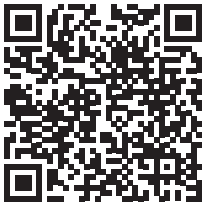
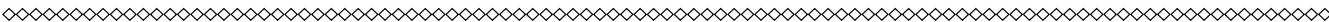
Cluster Summary

The Health Care (HC) cluster includes industries that provide for the health and well-being of Pennsylvania residents. Direct patient care forms the cornerstone of this cluster. Also included are industries that support direct patient care, such as ambulance services, health insurance carriers and public agencies that oversee health programs.

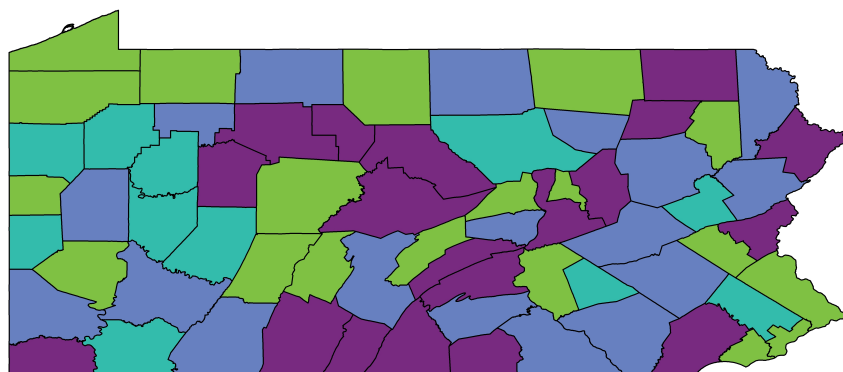
In addition, social assistance such as continuing care retirement communities and assisted living facilities for the elderly are included within HC.

	2018	2023
Employer Units	51,437	50,115
Number of Jobs	1,078,570	1,120,662
Percent of Total Pennsylvania Jobs	18.4%	18.8%
Average Annual Wages	\$54,904	\$68,054
Location Quotient (LQ)	1.23	1.23
LQs greater than one suggest a competitive advantage.		

Pennsylvania's employment in HC continues to grow as one of the nation's oldest populations continues to age. A national location quotient (LQ) of 1.23 places this cluster just under Bio-Medical (BM) for most competitive in the commonwealth. Unlike Bio-Medical, however, the competitiveness is evident in nearly every local area with only the Poconos Counties and Chester County Workforce Development Areas (WDAs) employing fewer than the national average (as seen on page 3).

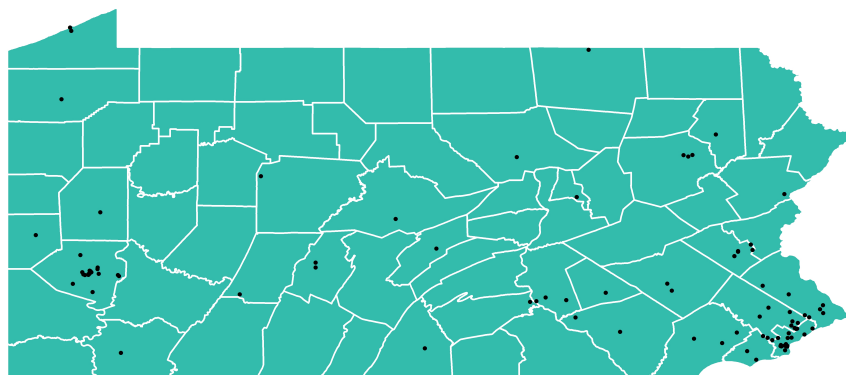


Percent Employment by County



Major Employers

- US Department of Veteran Affairs
- Trustees of the University of PA
- Saint Luke's Hospital
- UPMC Presbyterian Shadyside
- The Children's Hospital of Philadelphia
- Lehigh Valley Hospital Center



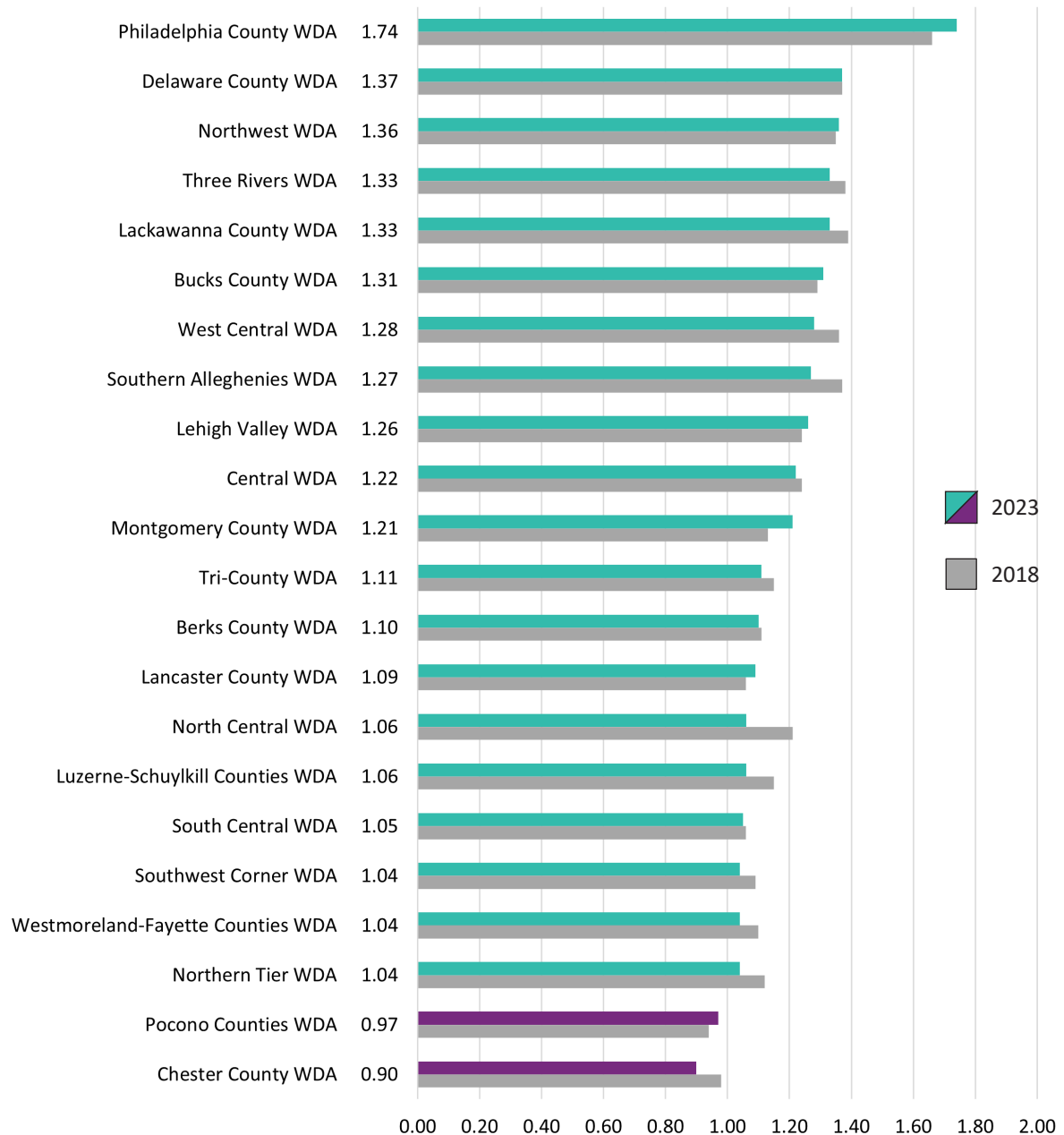
Top Industries Based on Employment

- General Medical & Surgical Hospitals
- Services for the Elderly & Disabled
- Offices of Physicians, Except Mental Health
- Home Health Care Services
- Nursing Care Facilities (Skilled)
- Continuing Care Retirement Communities
- Res. Intellectual & Developmental Disability Facilities
- Offices of Dentists
- Other Individual & Family Services
- Direct Health & Medical Insurance Carriers
- Specialty Hospitals
- Offices Of Specialty Therapists
- Outpatient Mental Health Centers
- Assisted Living Facilities for the Elderly
- All Other Outpatient Care Centers
- Residential Mental & Substance Abuse Care
- Child & Youth Services
- Ambulance Services
- Direct Life Insurance Carriers
- Psychiatric & Substance Abuse Hospitals



Employment Concentration

A location quotient, or LQ, compares a cluster's share of local employment to its share of national employment. This value can be used when evaluating the strength of an industry cluster within an area. An LQ greater than one indicates that the cluster has, on average, more employees locally than typically expected implying a possible competitive advantage. Philadelphia County and Montgomery County Workforce Development Areas (WDAs) both have LQs greater than one and have also increased their competitiveness by at least four percent since 2018.



This graph illustrates the minimum educational attainment levels for jobs found in this cluster's various industries. With 40 percent of HC jobs requiring short- or moderate-term on-the-job training, this cluster offers many opportunities for people seeking immediate employment. Many of these do require ongoing training and/or additional certification to stay abreast of changes in technology, treatment and patient care.



			Annual Demand	
SOC Code	Occupation	Average Wage	All Industries	Industry Cluster
31-1120	Home Health & Personal Care Aides	\$31,420	32,639	30,357
31-1131	Nursing Assistants	\$41,700	11,232	10,439
29-1141	Registered Nurses	\$90,830	8,890	7,978
31-9092	Medical Assistants	\$42,940	4,179	4,095
29-2061	Licensed Practical & Licensed Vocational Nurses	\$62,550	2,899	2,575
43-6013	Medical Secretaries & Administrative Assistants	\$43,440	2,810	2,570
21-1018	Substance Abuse, Beh. Disorder & MH Counselors	\$61,040	2,423	1,954
43-4171	Receptionists & Information Clerks	\$36,340	4,827	1,690
35-3041	Food Servers, Nonrestaurant	\$32,060	2,287	1,662
29-2052	Pharmacy Technicians	\$40,710	1,987	1,605
21-1093	Social & Human Service Assistants	\$45,190	2,163	1,555
11-9111	Medical & Health Services Managers	\$120,560	1,881	1,481
31-9091	Dental Assistants	\$49,760	1,526	1,468
37-2012	Maids & Housekeeping Cleaners	\$33,340	6,381	1,378
29-1123	Physical Therapists	\$98,830	694	643

