



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 83 percent of all employment in the commonwealth.

## Cluster Summary

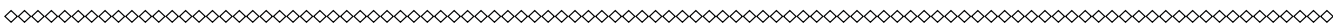
The Health Care (HC) cluster includes industries that provide for the health and well-being of Pennsylvania residents. Direct patient care forms the cornerstone of this cluster. Also included are industries that support direct patient care, such as ambulance services, health insurance carriers and public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

	2015	2019	2020
Employer Units	52,942	51,446	51,245
Number of Jobs	1,005,828	1,100,294	1,070,848
Percent of Total Pennsylvania Jobs	17.7%	18.6%	19.5%
Average Annual Wages	\$51,842	\$56,574	\$60,229
Location Quotient (LQ)	1.21	1.23	1.24

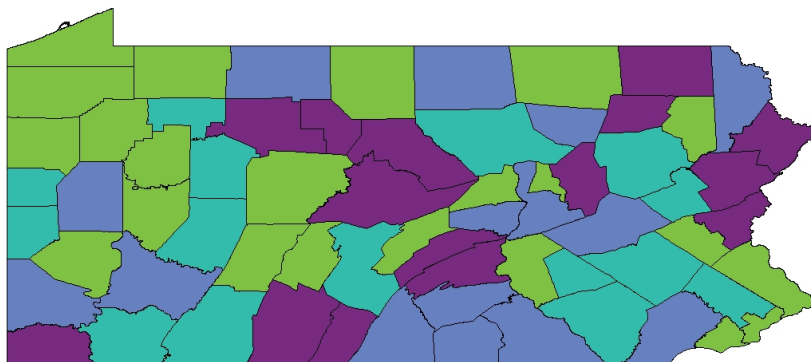
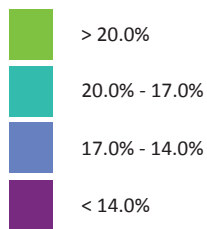
LQs greater than one suggest a competitive advantage.

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 1.24 places this cluster just under Bio-Medical (BM) for most competitive in the commonwealth. Unlike Bio-Medical, 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).



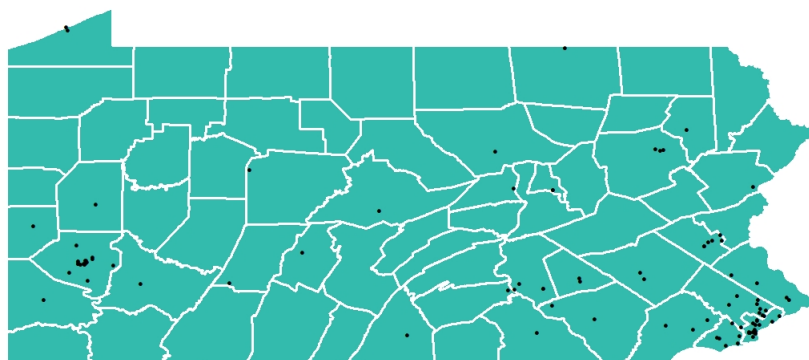
Note: The 2020 employment and wages data, as presented in this publication, reflect the effects of business and school closures implemented to mitigate the spread of Coronavirus (COVID-19).

## Percent Employment by County



## Major Employers

- US Department of Veteran Affairs
- University of Pennsylvania
- PA Department of Human Services
- UPMC Presbyterian Shadyside
- Saint Luke's Hospital
- Milton S Hershey Medical Center



## Top Industries Based on Employment

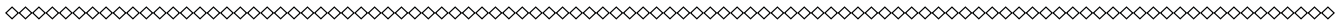
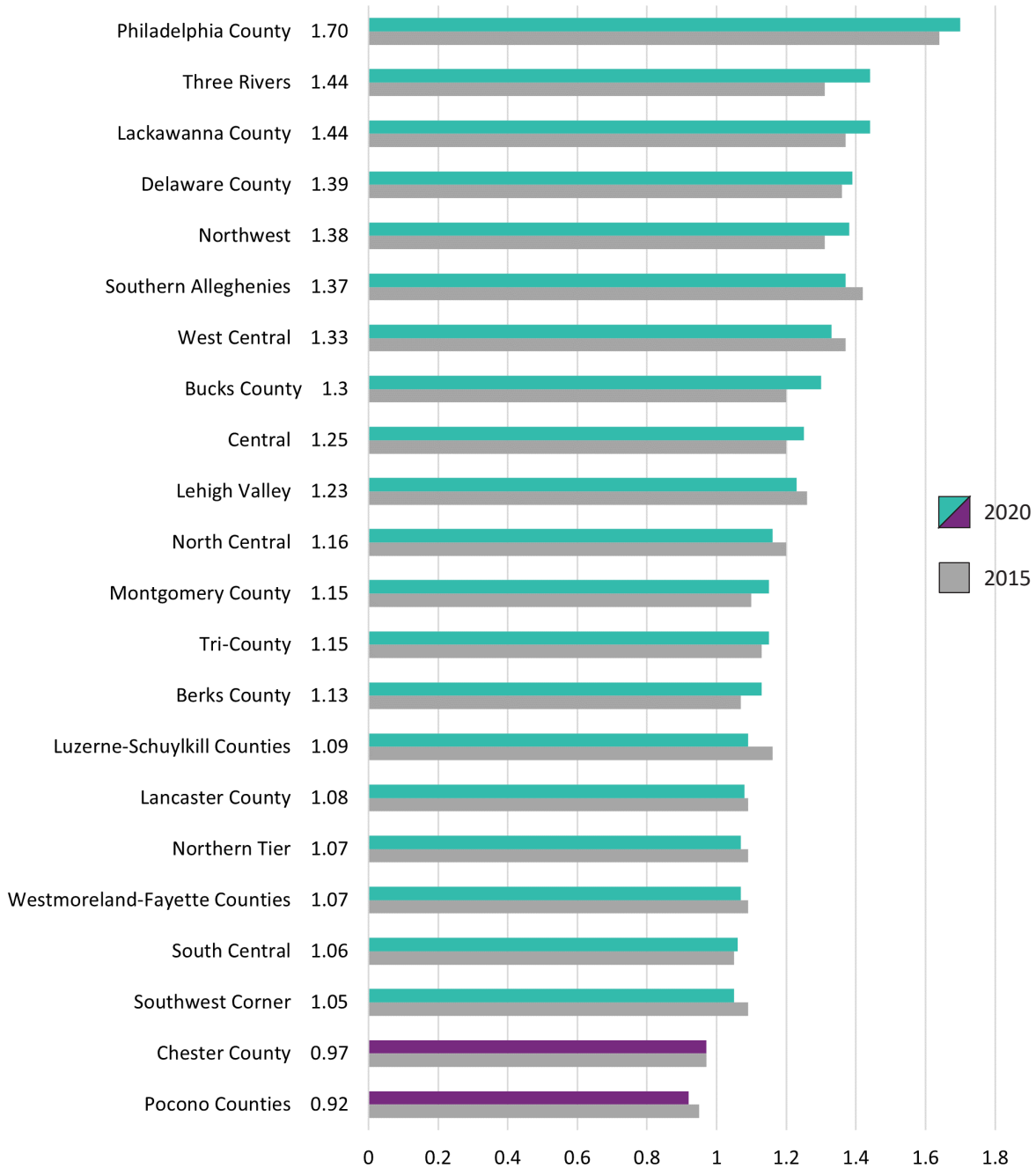
- General Medical & Surgical Hospitals
- Services for the Elderly & Disabled
- Offices of Physicians, Except Mental Health
- Nursing Care Facilities (Skilled)
- Home Health Care Services
- Continuing Care Retirement Communities
- Res. Intellectual & Developmental Disability Facilities
- Direct Health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



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## Employment Concentration

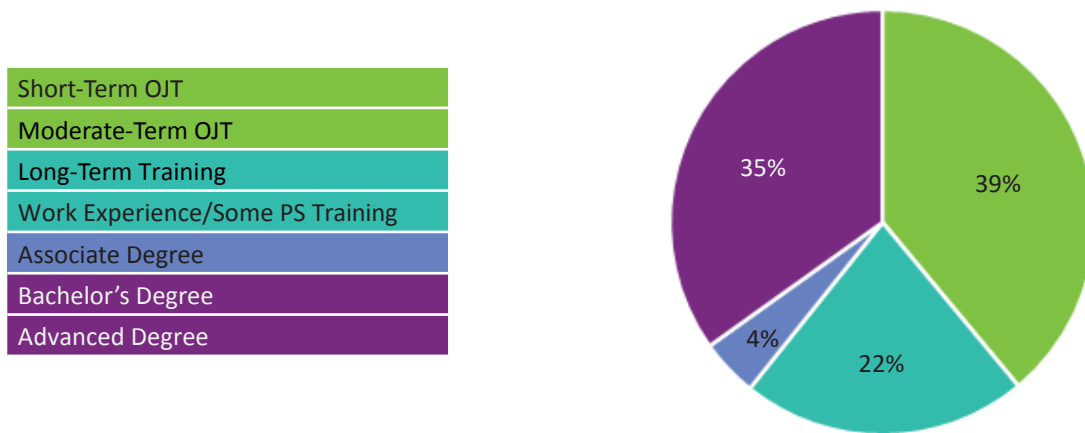
A location quotient, or LQ, compares a cluster's share of local employment to its share of national employment. This value can be used when evaluating the strength of an industry cluster within an area. An LQ greater than one indicates that the cluster has, on average, more employees locally than typically expected implying a possible competitive advantage. Three Rivers, Northwest, Bucks County, and Berks County Workforce Development Areas (WDAs) all have LQs greater than one and have also increased their competitiveness by at least 5 percent since 2015.



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## Educational Requirements

This graph illustrates the minimum educational attainment levels for jobs found in this cluster's various industries. With about 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.



## Occupations with Significant Employment

The following table lists occupations that employ at least 11,500 in the HC cluster.

SOC Code	Occupation	Average Wage	Annual Demand	
			All Industries	Industry Cluster
39-9021	Personal Care Aides	\$26,510	21,939	19,353
29-1141	Registered Nurses	\$74,170	10,507	9,398
31-1014	Nursing Assistants	\$32,560	10,191	9,101
31-1011	Home Health Aides	\$26,510	7,295	7,026
31-9092	Medical Assistants	\$34,670	3,905	3,712
43-9061	Office Clerks, General	\$38,360	19,111	3,226
29-2061	Licensed Practical & Licensed Vocational Nurses	\$50,250	3,690	3,188
43-4171	Receptionists & Information Clerks	\$30,960	5,784	2,831
43-6013	Medical Secretaries & Administrative Assistants	\$37,800	2,853	2,677
21-1018	Substance Abuse, Beh. Disorder & MH Counselors	\$48,450	3,058	2,477
43-4051	Customer Service Representatives	\$38,760	16,186	2,052
21-1093	Social & Human Service Assistants	\$35,550	2,654	1,868
43-1011	Supervisors - Office & Admin. Support Workers	\$63,070	7,225	1,261
11-9111	Medical & Health Services Managers	\$107,710	1,589	1,231
43-6014	Secretaries & Administrative Assistants	\$38,940	9,746	1,170

\*The 2020 average annual wage reflects wages across all industries and is not specific to the cluster.

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