

HEALTHCARE

Healthcare employment in the Tampa Bay MSA has largely kept pace with national trends, climbing by more than 23 percent over the past decade. This rate is slightly behind that of the state, which saw a 26 percent increase during the same period.

The sector employs more than 160,000 workers in a variety of settings. The largest industries within the sector are (based on employment in 2017):

- NAICS 6221: General Medical and Surgical Hospitals (with 43,529 jobs)
- NAICS 6211: Offices of Physicians (33,042 jobs)
- NAICS 6231: Nursing Care Facilities/Skilled Nursing Facilities (16,192 jobs)
- NAICS 6233: Continuing Care Retirement Communities and Assisted Living Facilities for the Elderly (12,343 jobs)
- NAICS 6216: Home Health Care Svcs. (11,811 jobs)

FIGURE 1. OVERVIEW: HEALTHCARE

DEFINITION: This sector includes establishments providing medical care on both an outpatient basis (through practitioners' offices, diagnostic clinics, and home health services) and inpatient basis (via general and specialty hospitals), as well as those providing residential care.



160,783

Jobs in Tampa Bay MSA, 2017



+23.4%

Employment change (%) past 10 years



\$68,848

Average earnings per job, 2017*



7,917

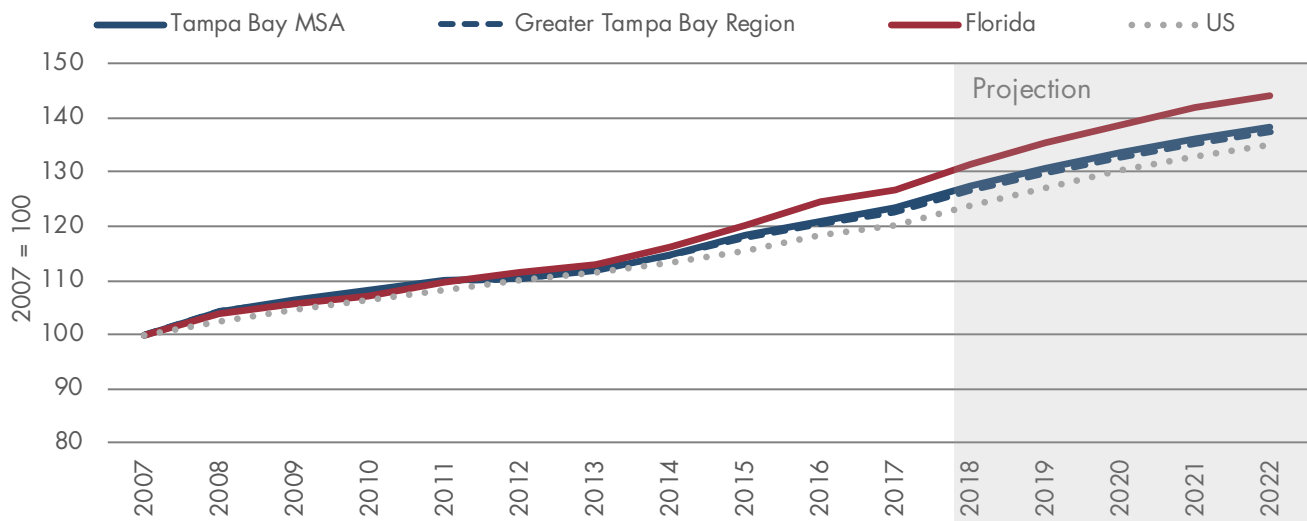
Payrolled business locations, 2017

CLASSIFICATION USED FOR ANALYSIS:

- NAICS 621 Ambulatory Health Care Services
- NAICS 622 Hospitals
- NAICS 623 Nursing and Residential Care Facilities

FIGURE 2. EMPLOYMENT TRENDS (HISTORIC & PROJECTED): HEALTHCARE

JOB CHANGE RELATIVE TO 2007, WITH COMPARISONS TO TOTAL EMPLOYMENT AND US TRENDS



Source(s): All figures, Emsi 2018.2 – QCEW Employees, Non-QCEW Employees, and Self-Employed

Note(s): *Average earnings per job is the total industry earnings for a region divided by number of jobs. It includes wages, salaries, supplements (additional employee benefits), and proprietor income. It is not equivalent to compensation paid directly to workers.

MAJOR EMPLOYERS. Hospitals and their health system owners are among the region’s largest healthcare employers. BayCare Health System is the largest employer, with almost 27,000 employees in Central Florida and just over 12,000 employees at the hospitals listed below. HCA is the second largest system with 18,000 employees in Central Florida and almost 10,000 employees at the hospitals listed below. Tampa General Hospital is the largest facility by number of beds, and St Josephs is the second largest.



FIGURE 3. LARGEST HOSPITALS IN TAMPA BAY MSA
RANKED BY NUMBER OF LICENSED BEDS

BUSINESS NAME	CITY	LICENSED BEDS	EMPLOYEE COUNT	TYPE	PARENT COMPANY
Tampa General Hospital	Tampa	1,011	6,769	Nonprofit	Florida Health Sciences Center Inc.
St. Joseph's Hospital ⁽¹⁾	Tampa	716	5,299	Nonprofit	BayCare Health System
Morton Plant Hospital	Clearwater	687	2,207	Nonprofit	BayCare Health System
Florida Hospital Tampa	Tampa	529	2,611	Nonprofit	Adventist Health System
James A. Haley VA Medical Center	Tampa	504	4,700	Gov't.	Department of Veterans Affairs
Bayfront Health St. Petersburg	St. Petersburg	480	1,589	For profit	Community Health Systems Inc.
Brandon Regional Hospital	Brandon	422	1,554	For profit	HCA Holdings Inc.
C.W. Bill Young VA Medical Center	Bay Pines	397	4,200	Gov't.	Department of Veterans Affairs
St. Anthony's Hospital	St. Petersburg	393	1,710	Nonprofit	BayCare Health System
Mease Countryside Hospital ⁽²⁾	Safety Harbor	311	1,993	Nonprofit	BayCare Health System
Palms of Pasadena Hospital	St. Petersburg	307	483	For profit	HCA Holdings Inc.
Regional Medical Ctr. Bayonet Point	Hudson	290	934	For profit	HCA Holdings Inc.
Medical Center of Trinity	New Port Richey	288	1,038	For profit	HCA Holdings Inc.
Northside Hospital	St. Petersburg	288	789	For profit	HCA Holdings Inc.
Oak Hill Hospital	Brooksville	280	952	For profit	HCA Holdings Inc.
Johns Hopkins All Children's Hospital	St. Petersburg	259	3,100	Nonprofit	Johns Hopkins Medicine
Largo Medical Center ⁽³⁾	Largo	256	1,310	For profit	HCA Holdings Inc.
St. Petersburg General Hospital	St. Petersburg	215	472	For profit	HCA Holdings Inc.
Moffitt Cancer Center	Tampa	206	3,009	Nonprofit	H. Lee Moffitt Cancer Center
Tampa Community Hospital	Tampa	201	377	For profit	HCA Holdings Inc.
Memorial Hospital of Tampa	Tampa	183	388	For profit	HCA Holdings Inc.
Largo Medical Center Indian Rocks ⁽³⁾	Largo	169	1,310	For-profit	HCA Holdings Inc.
Florida Hospital North Pinellas	Tarpon Springs	168	512	Nonprofit	Adventist Health System
Morton Plant North Bay Hospital	New Port Richey	150	800	Nonprofit	BayCare Health System

Source: Excerpted from “Largest Hospitals in Tampa Bay,” *Tampa Bay Bus. Journal*, Nov. 3, 2017. (Only hospitals in Hernando, Hillsborough, Pasco, and Pinellas counties with at least 150 licensed beds shown.)

Note(s): Data is from the Florida Agency for Health Care Administration. Other than beds and patient days all data shown is for (1) St. Joseph's Hospital, St. Joseph's Hospital North and St. Joseph's Hospital South; (2) Mease Dunedin and Mease Countryside Hospitals; (3) Largo Medical Center and Largo Medical Center Indian Rocks Beach.

STAFFING AND HIGH-DEMAND OCCUPATIONS. Figure 4 (below) shows which occupations hold the highest share of employment in the Healthcare industry overall and by subsector. Figure 5 (next page) shows demand factors for the 45 occupations with the highest share of industry employment.

FIGURE 4. KEY OCCUPATIONS: HEALTHCARE SECTOR (NAICS 62*) & SELECTED SUBSECTORS
PERCENT OF TOTAL JOBS IN INDUSTRY

HDOS	SOC CODE	DESCRIPTION	Healthcare	Ambulatory Health Care Services	Medical and Diagnostic Laboratories	Hospitals	Nursing and Residential Care Facilities
			62*	621	6215	622	623
▶	29-1141	Registered Nurses	14.5%	8.2%	1.1%	30.5%	6.5%
	31-1014	Nursing Assistants	9.8%	2.2%	0.3%	7.7%	30.1%
▶	29-2061	Licensed Practical/Vocational Nurses	4.3%	3.6%	0.3%	1.9%	9.5%
	31-9092	Medical Assistants	4.2%	7.5%	1.0%	1.5%	0.6%
▶	43-4171	Receptionists & Information Clerks	3.7%	6.4%	2.3%	0.9%	1.5%
▶	31-1011	Home Health Aides	2.8%	3.9%	0.2%	0.1%	4.2%
	39-9021	Personal Care Aides	2.1%	2.3%	0.4%	0.1%	4.8%
▶	29-1069	Physicians & Surgeons, All Other	2.0%	3.2%	2.5%	1.4%	0.0%
▶	43-9061	Office Clerks, General	1.9%	2.8%	1.5%	1.1%	0.9%
▶	37-2012	Maids & Housekeepers	1.7%	0.2%	0.1%	2.1%	4.6%
	31-9091	Dental Assistants	1.7%	3.5%	0.0%	0.0%	0.0%
▶	43-6013	Medical Secretaries	1.7%	2.7%	1.3%	1.2%	0.1%
▶	43-6014	Secretaries/Admin. Asst., Exc. Legal, Med., & Exec.	1.6%	2.1%	1.2%	1.4%	0.8%
▶	43-1011	First-Line Supvrs., Office & Admin. Support	1.6%	2.4%	1.7%	0.9%	0.5%
	43-3021	Billing & Posting Clerks	1.5%	2.6%	2.3%	0.8%	0.1%
	43-4051	Customer Service Representatives	1.4%	1.9%	6.5%	1.6%	0.1%
	29-2034	Radiologic Technologists	1.3%	1.3%	6.4%	2.1%	0.0%
	29-1123	Physical Therapists	1.2%	1.5%	0.1%	1.0%	0.4%
	11-9111	Medical & Health Services Managers	1.1%	1.1%	1.4%	1.3%	0.7%
	29-2011	Medical & Clinical Laboratory Technologists	1.1%	1.0%	11.9%	1.9%	0.0%
	29-2099	Health Technologists & Technicians, All Other	1.0%	1.2%	1.0%	1.4%	0.0%
	29-2021	Dental Hygienists	1.0%	2.0%	0.0%	0.0%	0.0%
	29-1171	Nurse Practitioners	1.0%	1.6%	0.1%	0.7%	0.1%
	35-3041	Food Servers, Nonrestaurant	0.9%	0.0%	0.0%	0.6%	3.5%
	29-1062	Family & General Practitioners	0.9%	1.7%	0.1%	0.4%	0.0%
	29-2071	Medical Records & Health Info. Technicians	0.9%	0.9%	0.5%	1.1%	0.4%
	31-9097	Phlebotomists	0.8%	1.3%	14.3%	0.8%	0.0%
	29-2012	Medical & Clinical Laboratory Technicians	0.7%	0.9%	8.1%	0.9%	0.0%
	29-1126	Respiratory Therapists	0.7%	0.1%	0.0%	2.0%	0.2%
	29-2041	Emergency Medical Techs. & Paramedics	0.7%	1.2%	0.0%	0.5%	0.0%

Source: Emsi 2018.2 – QCEW Employees, Non-QCEW Employees, and Self-Employed. High-demand occupations (HDOs) are those occupations that are expected to experience high pressure in three or more demand factors: new job growth, replacement demand, retirement exposure, or relative wages.

FIGURE 5. DEMAND FACTORS FOR THE TOP 45 OCCUPATIONS: HEALTHCARE

SOC CODE	DESCRIPTION	2017 Jobs	Projected Openings (2017-22)	Net Job Change (2017-2022)	Wage Premium (US=1.00)	% 55-64 Years	% 65+ Years
LOW-SKILL (High school or less)							
43-4051	Customer Service Representatives	48,113	35,613	4,046	0.69	14%	4%
43-9061	Office Clerks, General	26,767	16,841	1,000	0.88	20% ◀	9%
43-6014	Secretaries/Admin. Asst., Exc. Legal, Med., & Exec.	26,624	15,195	815	0.75	25% ◀	10% ◀
37-2012	Maids & Housekeepers	14,983	11,317	1,208	0.66	21% ◀	7%
43-4171	Receptionists & Information Clerks	12,626	9,263	848	0.77	18%	10% ◀
35-2021	Food Preparation Workers	8,826	8,174	564	1.01	12%	5%
39-9021	Personal Care Aides	6,888	6,457	1,232	0.53	25% ◀	11% ◀
31-1011	Home Health Aides	3,958	3,162	771	0.82	21% ◀	7%
39-9032	Recreation Workers	3,225	2,908	179	0.84	16%	7%
35-3041	Food Servers, Nonrestaurant	2,258	1,988	253	0.95	15%	7%
35-2012	Cooks, Institution & Cafeteria	2,152	1,706	154	1.05	18%	6%
43-4111	Interviewers, Except Eligibility & Loan	2,517	1,689	146	1.33	17%	8%
39-9041	Residential Advisors	1,141	1,012	51	0.83	14%	3%
31-9099	Healthcare Support Workers, All Other	1,147	821	93	0.46	18%	4%
29-2099	Health Technologists & Technicians, All Other	1,617	704	184	0.51	16%	4%
MIDDLE-SKILL (More than high school, less than four years)							
31-1014	Nursing Assistants	16,217	10,638	1,308	0.52	17%	5%
43-1011	First-Line Supvrs., Office & Admin. Support	16,527	9,410	1,127	1.89	21% ◀	5%
41-3099	Sales Reps., Services, All Other	11,958	7,934	671	0.81	17%	5%
49-9071	Maintenance & Repair Workers, General	13,306	7,449	861	0.70	25% ◀	7%
31-9092	Medical Assistants	7,515	5,213	1,019	0.91	10%	2%
43-3021	Billing & Posting Clerks	5,749	3,466	525	0.90	18%	5%
29-2061	Licensed Practical/Vocational Nurses	7,448	3,283	583	1.14	21% ◀	6%
29-2052	Pharmacy Technicians	4,963	2,300	329	0.60	11%	2%
43-6013	Medical Secretaries	3,006	2,291	561	0.97	24% ◀	8%
31-9091	Dental Assistants	2,848	1,902	291	1.08	10%	2%
31-9097	Phlebotomists	1,505	1,053	237	0.77	12%	2%
31-9094	Medical Transcriptionists	1,608	977	22	1.52	21% ◀	8%
29-2041	Emergency Medical Techs. & Paramedics	1,772	864	300	1.08	8%	2%
29-2071	Medical Records & Health Info. Technicians	2,003	834	213	1.06	22% ◀	6%
29-2034	Radiologic Technologists	2,240	789	193	1.65	16%	3%
29-2012	Medical & Clinical Laboratory Technicians	1,521	703	209	0.51	20% ◀	4%

Continued next page

Note(s): Highlights: Wage premium = 10 percent or higher than US wages; 55-64 = 20 percent or higher; 65+ = 10 percent or higher.

FIGURE 5. DEMAND FACTORS FOR THE TOP 45 OCCUPATIONS: HEALTHCARE (CONTINUED)

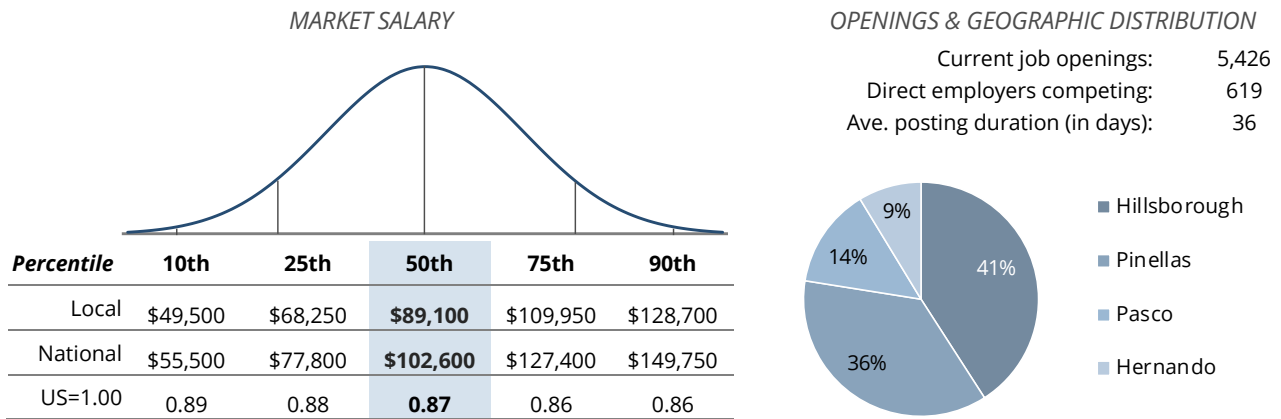
SOC CODE	DESCRIPTION	2017 Jobs	Projected Openings (2017-22)	Net Job Change (2017-2022)	Wage Premium (US=1.00)	% 55-64 Years	% 65+ Years
29-2021	Dental Hygienists	1,656	686	172	1.25	16%	3%
29-2055	Surgical Technologists	1,056	533	107	1.21	11%	2%
29-1126	Respiratory Therapists	1,211	416	124	1.21	20%	2%
29-2032	Diagnostic Medical Sonographers	716	316	120	1.13	16%	3%
29-2035	Magnetic Resonance Imaging Technologists	486	173	44	2.06	16%	3%
HIGH SKILL (Four-year degree or above)							
29-1141	Registered Nurses	27,156	9,888	2,774	0.40	22% ◀	4%
11-9111	Medical & Health Services Managers	2,225	1,207	306	0.84	26% ◀	6%
29-1069	Physicians & Surgeons, All Other	3,919	984	431	2.31	21% ◀	10% ◀
29-2011	Medical & Clinical Laboratory Technologists	2,126	912	230	0.82	21% ◀	4%
29-1051	Pharmacists	3,295	862	152	0.54	17%	6%
29-1171	Nurse Practitioners	1,765	794	334	1.20	22% ◀	4%
29-1123	Physical Therapists	1,815	667	278	1.87	12%	2%
29-1062	Family & General Practitioners	1,628	338	111	1.08	22% ◀	11% ◀
29-1021	Dentists, General	1,146	259	77	0.91	22% ◀	12% ◀

Source: Emsi 2018.2—QCEW Employees, Non-QCEW Employees, and Self-Employed.

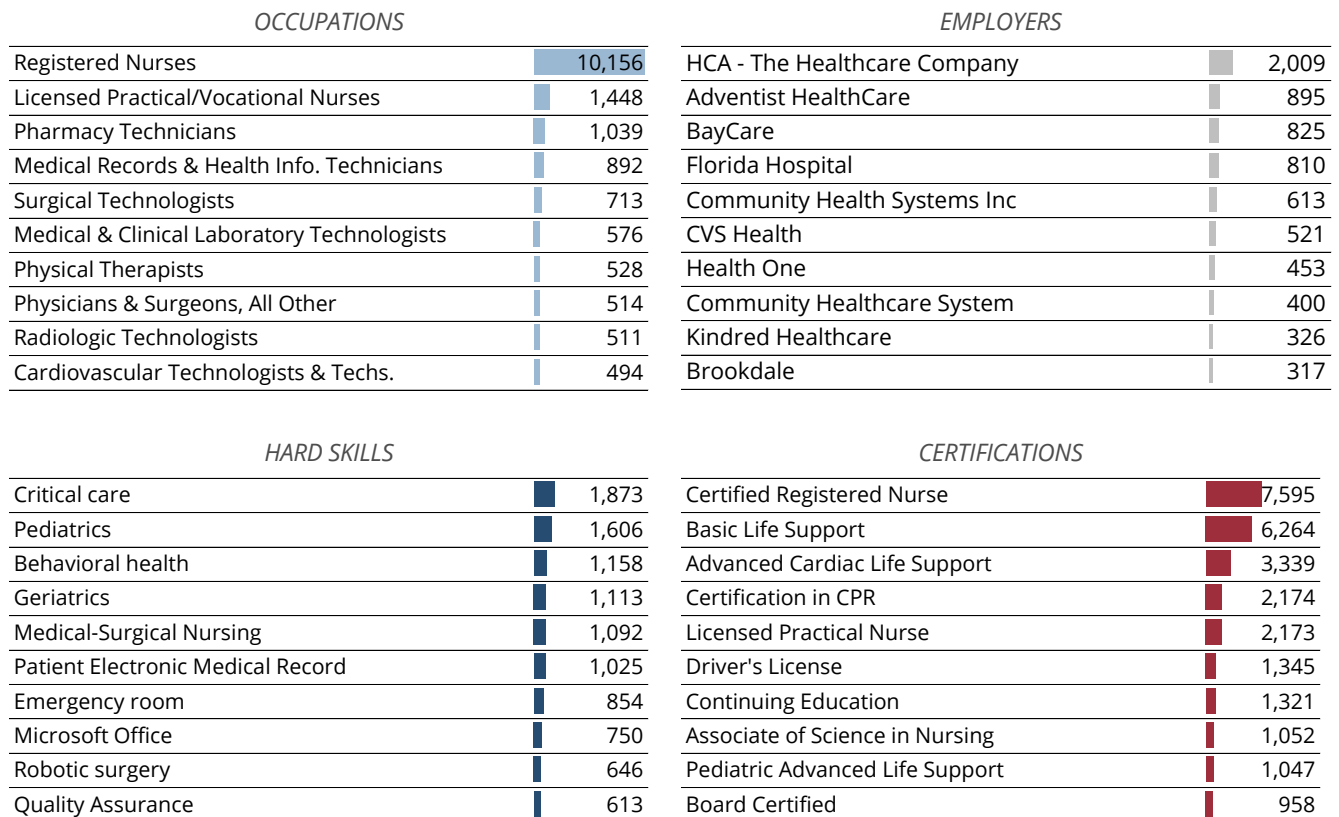
Note(s): Highlights: Wage premium = 10 percent or higher than US wages; 55-64 = 20 percent or higher; 65+ = 10 percent or higher.

HIRING. The following figures use real-time labor market information (LMI) to illustrate the hiring environment in the Tampa Bay MSA for selected occupational groups relevant to the Healthcare sector.

FIGURE 6. REAL-TIME LMI OVERVIEW: HEALTHCARE PRACTITIONER & TECH. OCCUPATIONS (SOC 29-0000)
JOB POSTINGS IN ALL INDUSTRIES, TAMPA BAY MSA (JAN 1, 2018–JUN 30, 2018)

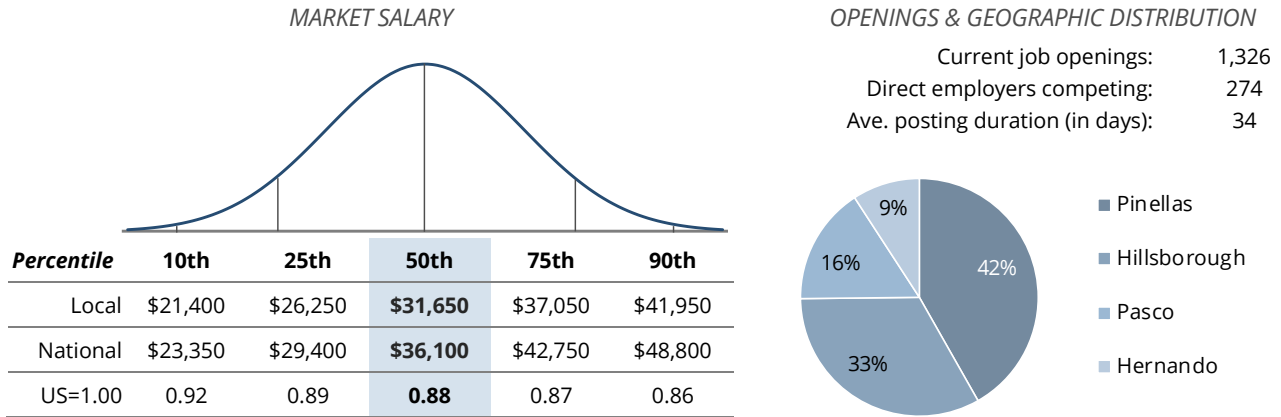


TOP 10 COUNTS (number of postings out of ~20,000 total from Jan 1, 2018–Jun 30, 2018)

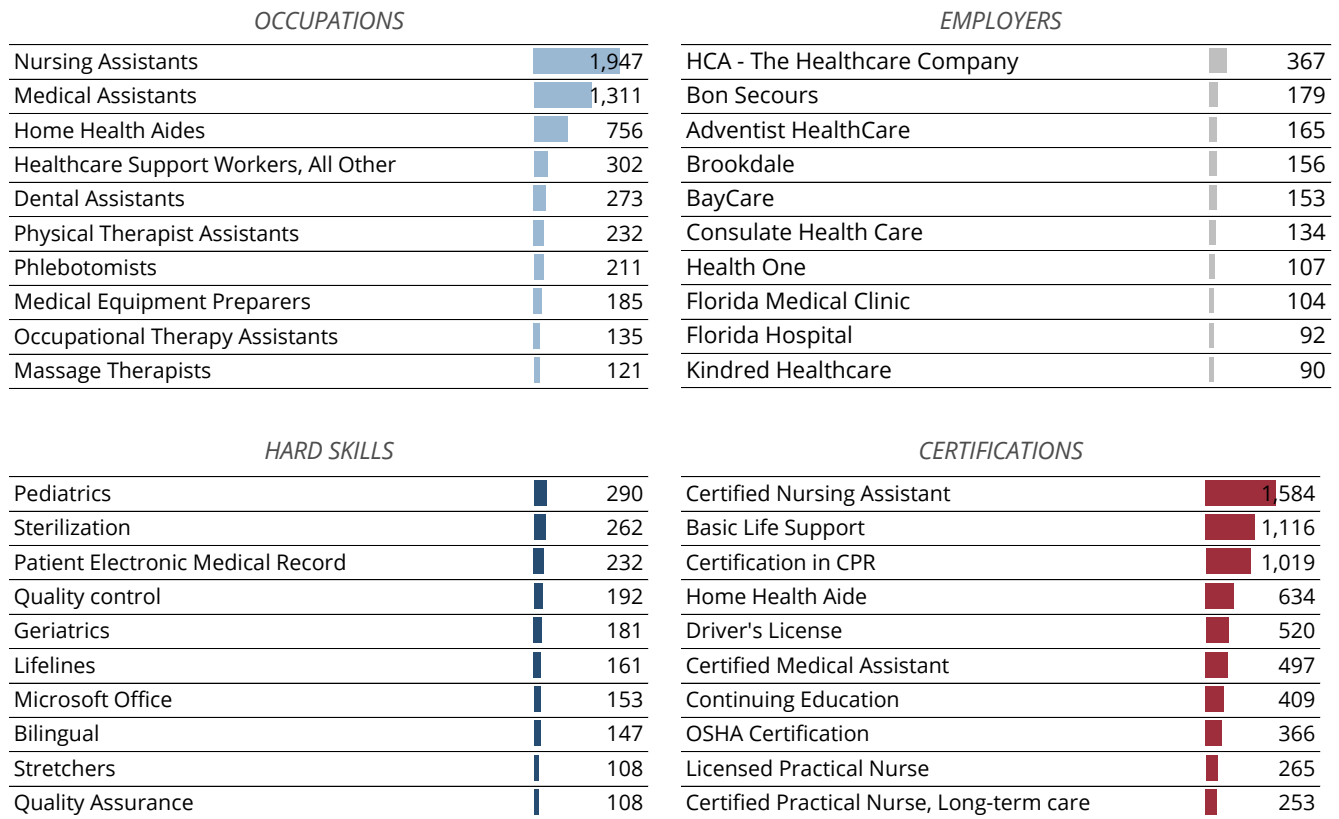


Source: Gartner Talent Neuron (formerly Wanted Analytics)

FIGURE 7. REAL-TIME LMI OVERVIEW: HEALTHCARE SUPPORT OCCUPATIONS (SOC 31-0000)
 JOB POSTINGS IN ALL INDUSTRIES, TAMPA BAY MSA (JAN 1, 2018-JUN 30, 2018)



TOP 10 COUNTS (number of postings out of ~5,300 total from Jan 1, 2018-Jun 30, 2018)



Source: Gartner Talent Neuron (formerly Wanted Analytics)

TRAINING. Figure 8 through Figure 10 provide an overview of training relevant to the Healthcare sector. Noncredit offerings are programs that do not lead to a degree. They include certificate programs, continuing education credits, and other types of workforce training programs.

The Tampa Bay MSA offers a number of noncredit programs in virtually all healthcare career paths. Only the Biotechnology/R&D pathway appears to be lacking among the institutions analyzed. Apprenticeships are less common in among healthcare workers than among those in skilled trades and production occupations. As a result, the relative lack of apprenticeship programs is not surprising.

The regional school districts offer programs career and technical education programs including nursing assistant, introduction to health science, allied health assisting, and EKG technician. These courses train students for industry certifications including certified nurse assistant, certified EKG technician, and certified medical assistant.

FIGURE 8. NONCREDIT OFFERINGS BY CAREER PATHWAY FOR SELECTED SCHOOLS

PATHWAY	HCC	SPC	PHSC	PTC
Biotechnology R&D			—	
Diagnostic Services	●		—	
Health Informatics	●	●	—	●
Support Services	●	●	—	●
Therapeutic Services	●	●	—	●

FIGURE 9. APPRENTICESHIP PROGRAMS BY CAREER PATHWAY

	NUMBER
TOTAL	1
Biotechnology R&D	
Diagnostic Services	
Health Informatics	1
Support Services	
Therapeutic Services	

Sources: TIP Research (Figure 8), US DOL – ETA (Figure 9). Programs were categorized by career cluster and career pathway by TIP using O-Net. Pasco-Hernando State College non-credit courses were not available.

FIGURE 10. DEGREE PROGRAM OFFERINGS: HEALTH SCIENCE CAREER CLUSTER SELECT REGIONAL INSTITUTIONS DURING THE 2016 ACADEMIC YEAR

PATHWAY	USF-Main	USF-SP	HCC	PHSC	PTC-CW	PTC-SP	SPC
Biotechnology R&D							
Diagnostic Services	●		●	●			●
Health Informatics			●	●	●	●	●
Support Services	●			●	●		●
Therapeutic Services	●		●	●	●	●	●

Source: National Center for Education Statistics, Integrated Postsecondary Education Data System (IPEDS). Note(s): IPEDS data include only schools eligible to participate in federal financial aid programs. Programs were categorized by career cluster and career pathway by TIP using O-Net. USF = University of South Florida; HCC = Hillsborough Community College; PHSC = Pasco-Hernando State College; PTC = Pinellas Technical College; SPC = St. Petersburg College.

ASSOCIATIONS & RESOURCES. Tampa Bay has a number of assets and initiatives that support the Healthcare sector. These include:

- *West Central Florida Healthcare Human Resource Association.* The West Central Florida Healthcare Human Resources Association (WCFHHRA) is a formal organization of human resource professionals that work in the healthcare field in West Central Florida.
- *Suncoast Nursing Accelerated Program.* This program is available to students majoring in biology at the USF Sarasota-Manatee campus. Students apply for the SNAP program in the fall of their second year and can even take an online nursing class from USF Tampa during their third year as a biology major. After graduating with a biology degree admission to the College of Nursing at USF Tampa is guaranteed. The nursing classes must be taken at USF Tampa but students will have clinical rotations locally (Pinellas, Sarasota and Manatee counties).
- *Florida Hospital Association.* Founded in 1927, the Florida Hospital Association (FHA) is the voice of Florida's hospital community. Through representation and advocacy, education and informational services, FHA supports the mission of its members to provide the highest quality of care to the patients they serve. Headquartered in Orlando, FHA has a regional office in Tallahassee and representation in Washington, D.C.
- *American Red Cross, Nursing Assistant Training.* Florida CNA classes from the American Red Cross are designed as small, daytime courses which makes it possible to get personalized attention as you learn under the tutelage of licensed instructors with professional nursing experience. After completing your classroom training, you'll gain hands-on experience by working directly with patients in a healthcare facility during your clinical rotations. All rotations are supervised by a Licensed Nurse, who is also licensed by the state as a Nurse Assistant Training Instructor, who can give you the guidance you need to succeed.
- *Florida Apprenticeship Consortium.* St Petersburg College in partnership with Florida State College Jacksonville and Broward College to expand high-quality apprenticeships in healthcare.