



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.

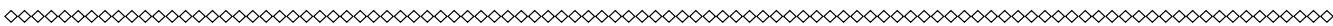
## Cluster Summary

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.

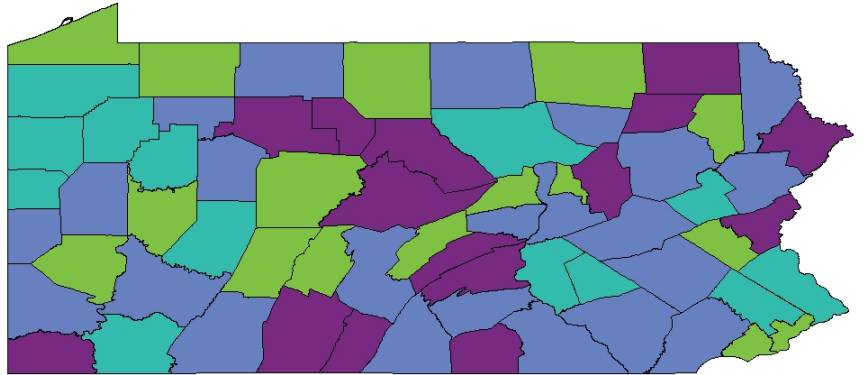
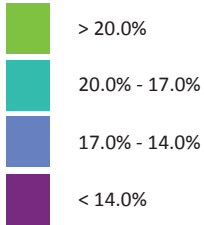
In addition, social assistance such as continuing care retirement communities and assisted living facilities for the elderly are included within HC.

	2017	2022
Employer Units	52,569	51,845
Number of Jobs	1,050,820	1,076,962
Percent of Total Pennsylvania Jobs	18.1%	18.4%
Average Annual Wages	\$53,410	\$66,611
Location Quotient (LQ)	1.22	1.22
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 1.22 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).

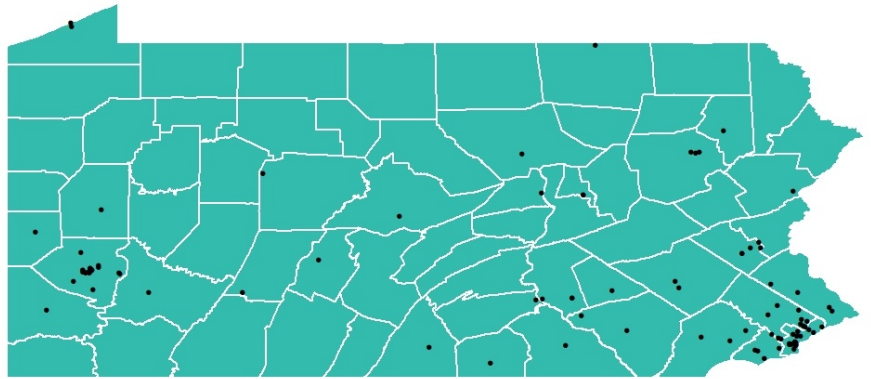


## Percent Employment by County



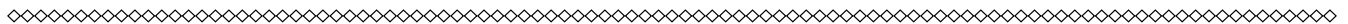
## Major Employers

- US Department of Veteran Affairs
- Trustees of the University of PA
- Saint Luke's Hospital
- Lehigh Valley Hospital Center
- Western Penn Allegheny Health
- Milton S Hershey Medical Center



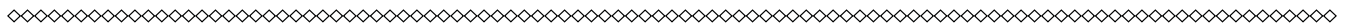
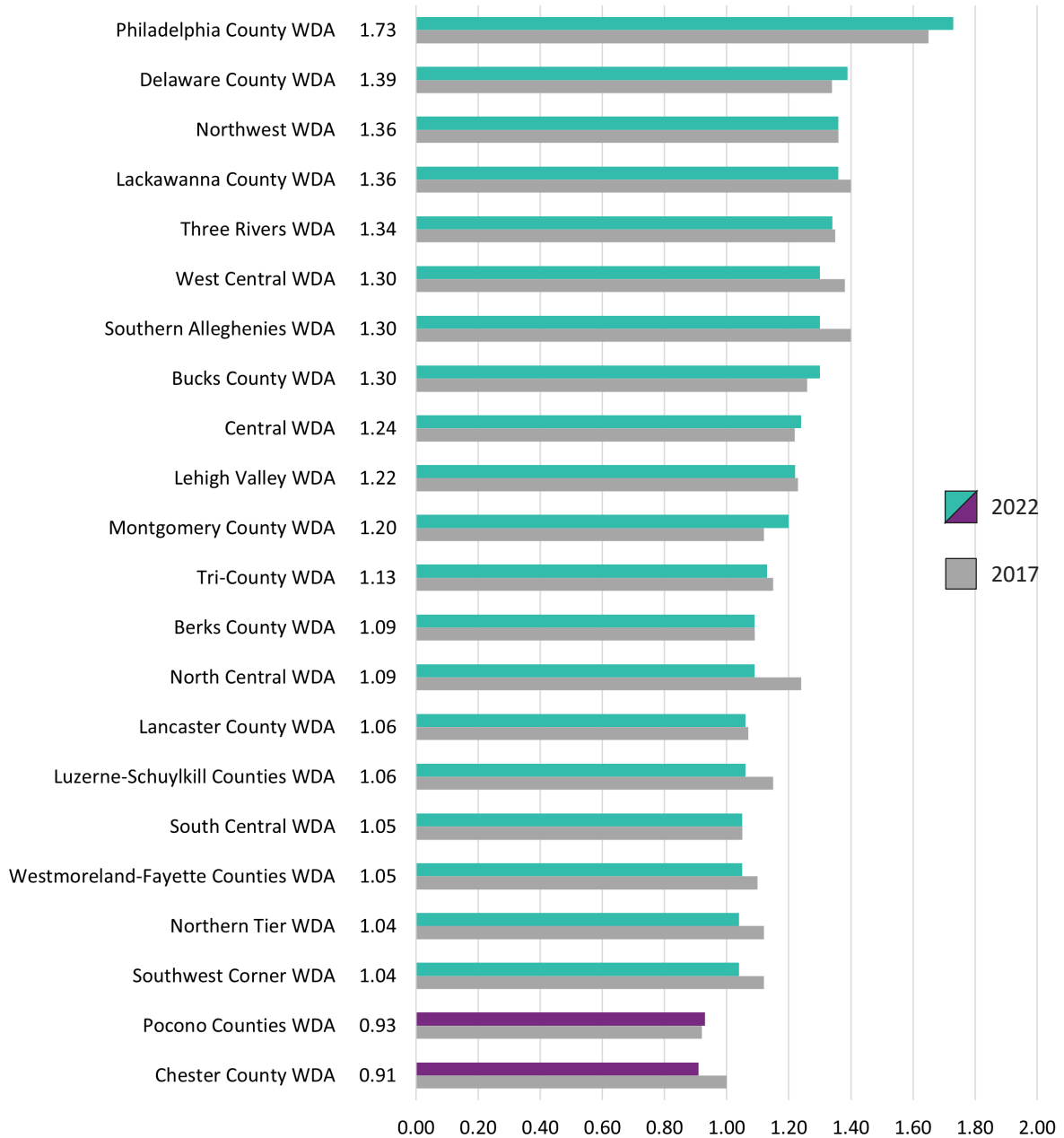
## Top Industries Based on Employment

- General Medical & Surgical Hospitals
- Services for the Elderly & Disabled
- Offices of Physicians, Except Mental Health
- Home Health Care Services
- Nursing Care Facilities (Skilled)
- Continuing Care Retirement Communities
- Res. Intellectual & Developmental Disability Facilities
- Offices of Dentists
- Direct Health & Medical Insurance Carriers
- Other Individual & Family Services
- Other Hospitals
- Offices Of Specialty Therapists
- Outpatient Mental Health Centers
- Assisted Living Facilities for the Elderly
- Residential Mental & Substance Abuse Care
- Child & Youth Services
- Direct Life Insurance Carriers
- All Other Outpatient Care Centers
- Ambulance Services
- 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 five percent since 2017.



## 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 10,400 in the HC cluster.

SOC Code	Occupation	Average Wage	Annual Demand	
			All Industries	Industry Cluster
31-1120	Home Health & Personal Care Aides	\$30,580	27,478	24,694
31-1131	Nursing Assistants	\$39,780	10,200	8,903
29-1141	Registered Nurses	\$87,530	9,284	8,290
31-9092	Medical Assistants	\$42,090	4,056	3,887
29-2061	Licensed Practical & Licensed Vocational Nurses	\$58,800	3,436	3,008
43-9061	Office Clerks, General	\$43,230	16,622	2,924
43-6013	Medical Secretaries & Administrative Assistants	\$41,320	2,767	2,522
43-4171	Receptionists & Information Clerks	\$34,410	5,275	2,474
43-4051	Customer Service Representatives	\$45,130	15,067	2,420
21-1018	Substance Abuse, Beh. Disorder & MH Counselors	\$56,090	2,774	2,244
35-3041	Food Servers, Nonrestaurant	\$31,480	2,376	2,027
11-9111	Medical & Health Services Managers	\$125,860	2,175	1,712
37-2012	Maids & Housekeeping Cleaners	\$32,340	6,136	1,555
21-1093	Social & Human Service Assistants	\$43,550	2,245	1,554
31-9091	Dental Assistants	\$47,770	1,507	1,438

\*The 2023 average annual wage reflects wages across all industries and is not specific to the cluster.