

# Health and Wellness



8th

Largest **health and wellness** cluster in Florida.



56,628

Employed in the **health and wellness** cluster.



3,105

Establishments in the **health and wellness** cluster.



2.6%

Average annual employment growth in the **health and wellness** cluster.



576

Job seekers from top 20 occupations in the **health and wellness** cluster.

# Industry Overview

The Health and Wellness cluster in Southwest Florida reflects the national growth rate in health care services. Although it ranks as the 8th largest cluster in the state, it accounts for 5.7 percent of total employment in the state. The growth of this sector soared at nearly 17 percent over the six-year period (2009 to 2015). The cluster includes a long list of small establishments, and a few large ones, that provide services across the country (as measured by employment). These would include medical services such as oncology, orthopedics, radiology, physical therapy, cosmetic surgery, dental and eye care. This cluster also includes hospitals, urgent care centers, providers of assisted living, and hospice. Pharmacies, home care and funeral homes are also part of this cluster. Of the five counties that make up the SWFL region, Lee, Collier and Charlotte counties have the largest number of smaller establishments (fewer than 5 workers). Similarly, those three counties contain some of the largest establishments that employ 500 or more workers. A large percentage of jobs in this cluster will require an educated workforce, with post high school training, certificates or degrees. The jobs in this cluster are growing due to a growing sector of the population that is aging. The state of Florida ranks number one as having the largest percentage of its population over the age of 65 years. According to the Bureau of Labor statistics, the highest growth in jobs by occupations is for health care aides, nursing and medical assistants. The BLS also shows that jobs in health and wellness are expected to pay better than average wages and salaries commensurate with education, skills and experience. This bodes well for retention of and opportunities for graduates of Florida's schools and universities.

## Economic Profile

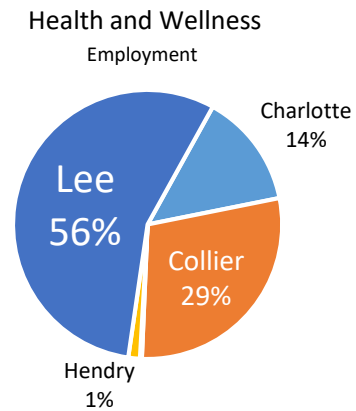
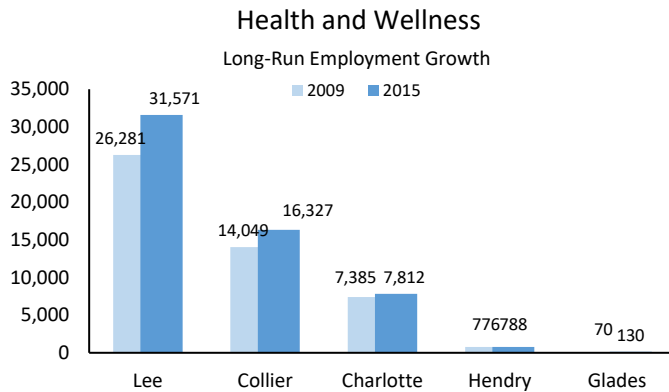
The Health and Wellness cluster consists of 35 six-digit North American Industry Classification System (NAICS) codes that form eight subclusters. These include the offices of healthcare providers, hospitals, medical labs, homes for the elderly, drug stores and funeral homes. It is the eighth largest cluster in Southwest Florida as measured by employment.

The five-county region ranked eighth in the state of Florida out of 24 workforce regions, with an employment level of 56,628 in 2015. This cluster of 3,105 establishments accounted for about 2 percent of total employment in the state. However, over the six-year period (2009-2015), the number of jobs in this cluster group grew by over 16 percent in the region as compared to a growth rate of about 10 percent for the state. The number of establishments in the cluster represented 5.5 percent of the total number of such establishments in the state. The location quotients for this cluster's employment relative to the state and the country were just over 1, implying that the concentration of employment in this region relative to the state and the country is slightly higher. This contrasts to the LQ of the entire state of Florida that is below 1 (.93) as compared to the country.

Health and Wellness Economic Profile		
	Southwest Florida	Florida
Employment, 2015	56,628	994,746
Number of Establishments, 2015	3,105	56,311
Short-run employment growth, 2014 to 2015	1.0%	2.1%
Long-run employment growth, 2009 to 2015	16.6%	9.8%
Average annual employment growth, 2009 to 2015	2.6%	1.9%
Workforce Region Employment Ranking, 2015	8th	--
Location Quotient, Relative to Florida, 2015	1.20	--
Location Quotient, Relative to United States, 2015	1.12	0.93

*Source: County Business Patterns: 2015*

# Employment by County



As shown in the graphs above and the table below, the majority of the employment distribution of Southwest Florida’s health and wellness cluster is in Lee County, which accounts for over 31,000 private-sector jobs or 56 percent of the total employment of this cluster in the five county region. (This figure does not include the more than 13,000 jobs accounted for by the publicly funded Lee Health system, which is one of the largest employers in all of Lee County.) Employment in Collier County is almost half that amount, representing 29 percent of jobs. Together these two counties account for about 85 percent of total employment. Charlotte County employs about half the number as in Collier, followed by significantly smaller numbers in Hendry and Glades counties. Over the six-year period (2009-2015), employment in Lee County increased by 19 percent while increasing by 14 percent in Collier. These convert to annual rates of approximately 3.2 percent and 2.3 percent, respectively. Charlotte and Hendry counties showed annual growth rates over the six-year period of less than 1 percent. In contrast to these smaller counties, employment in Glades County, although relatively low, jumped by 86 percent over the six-year period.

Health and Wellness Employment		
By County		
County	Employment	Percent of Total Employment
Charlotte	7,812	13.8%
Collier	16,327	28.8%
Glades	130	0.2%
Hendry	788	1.4%
Lee	31,571	55.8%
<b>Southwest Florida</b>	<b>56,628</b>	<b>100.0%</b>

Source: County Business Patterns: 2015

Southwest Florida’s health and wellness cluster had a total of 3,105 establishments in 2015. Of these, 2,939 or 95 percent employed less than 50 employees. Lee County had the most health and wellness establishments in Southwest Florida, close to 50 percent of the total. Close to 70 percent of these establishments employ less than 10 workers in the county, but about 2 percent of the establishments employ between 100 and 249 workers, reflecting the larger establishments that reside in this county. Collier County closely matched this pattern, with about 75 percent of all establishments employing less than 10 workers, and 2 percent employing between 100 and 249 workers. With lower numbers, Charlotte and Hendry counties followed this pattern in that most of their establishments employed less than 10 employees, with fewer than 10 establishments employing between 100 and 249 employees. Glades County had just a few total establishments in this cluster, but not one that employed more than 50 employees.

## Health and Wellness Establishments

By County

County	Number of Employees in Establishment									Total
	1 to 4	5 to 9	10 to 19	20 to 49	50 to 99	100 to 249	250 to 499	500 to 999	1000+	
Charlotte	234	122	53	49	13	9	1	2	0	483
Collier	546	250	129	89	21	21	3	1	1	1,061
Glades	2	0	1	2	0	0	0	0	0	5
Hendry	18	9	9	4	2	2	0	0	0	44
Lee	696	354	231	141	43	32	9	1	5	1,512
<b>Southwest Florida</b>	<b>1,496</b>	<b>735</b>	<b>423</b>	<b>285</b>	<b>79</b>	<b>64</b>	<b>13</b>	<b>4</b>	<b>6</b>	<b>3,105</b>

Source: County Business Patterns: 2015

Employment growth in the health and wellness cluster varied widely by county over the six-year period of 2009-2015. None of the counties experienced a loss of jobs in this cluster. Of the five counties, Lee County had the largest number of employees in this cluster in 2009 (26,281) and grew by about 3.1 percent on average per year through 2015, showing an overall gain of 20.1 percent. In contrast, Glades County had the lowest number of employees in 2009 but experienced an 86 percent gain in jobs over the six-year period, or about an 11 percent annual rate. The second largest county in this region for employment, Collier County, showed employment gains at an annual rate of 2.5 percent over the same six-year period. Job gains were also strong in Charlotte County (5.8 percent). Hendry County had a smaller six-year gain (1.5 percent). Overall, growth in employment in the health and wellness cluster grew close to 17 percent during the 2009-2015 period, or at an annual rate of 2.6 percent.

## Health and Wellness Long-Run Employment Growth

By County

County	Employment			Percent Change	Average Annual Percent Change
	2009	2015			
Charlotte	7,385	7,812	5.8%	0.9%	
Collier	14,049	16,327	16.2%	2.5%	
Glades	70	130	85.7%	10.9%	
Hendry	776	788	1.5%	0.3%	
Lee	26,281	31,571	20.1%	3.1%	
<b>Southwest Florida</b>	<b>48,561</b>	<b>56,628</b>	<b>16.6%</b>	<b>2.6%</b>	

Source: County Business Patterns: 2015

# Employment by Subcluster

The table below disaggregates the health and wellness sector into eight sub-clusters. This helps to illustrate where the jobs are concentrated. The majority of all jobs in this cluster are in healthcare provider offices. Employment accounts for over 38 percent of total jobs, followed closely by employment in home and residential care at 29 percent. The third largest employers by subcluster are hospitals. These three subclusters account for over 90 percent of all employment in the total health and wellness cluster.

Health and Wellness Employment By Subcluster		
Subcluster	Employment	Percent of Total Employment
Healthcare Provider Offices	21,751	38.4%
Home and Residential Care	16,464	29.1%
Hospitals	13,585	24.0%
Drug Stores	2,600	4.6%
Medical Laboratories	1,229	2.2%
Optical Goods Retailing	456	0.8%
Funeral Service and Crematories	395	0.7%
Medical Equipment Distribution and Rental	148	0.3%
<b>Total</b>	<b>56,628</b>	<b>100.0%</b>

Source: County Business Patterns: 2015

As shown in the table above, the top three subclusters in the total health and wellness cluster account for over 90 percent of all employment. The table below shows that the majority of the establishments within these three subclusters employ fewer than 50 workers. A total of only 10 establishments hire between 250 and 499 employees. These are home and residential care, where eight establishments have up to 250 employees, followed by only one establishment in the healthcare provider offices subcluster and one in medical laboratories that employ this many workers. The total number of jobs in the health care provider offices subcluster account for 76 percent of all jobs in Southwest Florida's health and wellness cluster.

Health and Wellness Establishments By Subcluster										
Subcluster	Number of Employees in Establishment									Total
	1 to 4	5 to 9	10 to 19	20 to 49	50 to 99	100 to 249	250 to 499	500 to 999	1000+	
Healthcare Provider Offices	1,228	611	308	157	29	13	1	0	1	2,348
Home and Residential Care	98	29	29	54	46	47	8	1	0	312
Drug Stores	27	16	53	57	2	0	0	0	0	155
Medical Laboratories	78	26	15	9	2	1	1	0	0	132
Optical Goods Retailing	40	25	10	1	0	0	0	0	0	76
Funeral Service and Crematories	20	18	6	4	0	0	0	0	0	48
Medical Equipment Distribution and Rental	5	10	2	2	0	0	0	0	0	19
Hospitals	0	0	0	1	0	3	3	3	5	15
<b>Total</b>	<b>1,496</b>	<b>735</b>	<b>423</b>	<b>285</b>	<b>79</b>	<b>64</b>	<b>13</b>	<b>4</b>	<b>6</b>	<b>3,105</b>

Source: County Business Patterns: 2015

Long-run growth in employment by subcluster is shown in the table below. It would appear that the fastest growth rate during the six-year period occurred in funeral service and crematories (79.5 percent). However, the actual number of employees increased by just 175. During the six-year period (2009-2015), the largest number of workers were in the healthcare provider offices. Jobs in this subcluster increased by about 4,600 over the six year period, followed by a gain of over 2,000 workers in home and residential care. These gains amounted to annual growth rates of 4.1 percent and 2.6 percent, respectively. For the entire health and wellness cluster, job growth over the six-year period in Southwest Florida was a robust 16.6 percent with a gain in 8,067 new jobs.

Health and Wellness Long-Run Employment Growth				
By Subcluster				
Subcluster	Employment		Percent Change	Average Annual Percent Change
	2009	2015		
Funeral Service and Crematories	220	395	79.5%	10.2%
Optical Goods Retailing	303	456	50.5%	7.1%
Healthcare Provider Offices	17,059	21,751	27.5%	4.1%
Home and Residential Care	14,130	16,464	16.5%	2.6%
Drug Stores	2,304	2,600	12.8%	2.0%
Medical Laboratories	1,128	1,229	9.0%	1.4%
Hospitals	13,185	13,585	3.0%	0.5%
Medical Equipment Distribution and Rental	232	148	-36.2%	-7.2%
<b>Total</b>	<b>48,561</b>	<b>56,628</b>	<b>16.6%</b>	<b>2.6%</b>

Source: County Business Patterns: 2015

# Workforce Ranking

Of all the workforce regions in the state of Florida, the Southwest Florida region ranked 8th with most employees in the health and wellness cluster in 2015. The number of workers in this cluster of Southwest Florida amounted to 56,628 out of a total of 994,746 in the state. This amounts to 5.7 percent of total jobs in this cluster as of 2015.

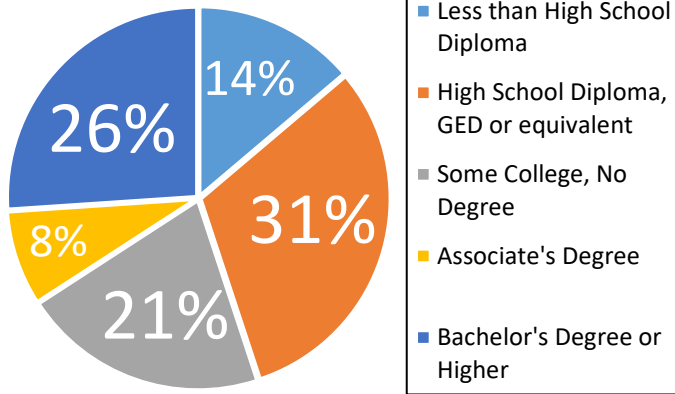
Health and Wellness Workforce Rankings		
Rank	Workforce Region	Employment Level
1	South Florida	131,754
2	Central Florida	116,081
3	Broward	86,776
4	Palm Beach County	77,516
5	Tampa Bay	73,981
6	Northeast Florida	73,659
7	Pinellas	66,656
<b>8</b>	<b>Southwest Florida</b>	<b>56,628</b>
9	Suncoast	42,384
10	Research Coast	29,771
11	Flagler Volusia	28,732
12	Brevard	27,648
13	Pasco Hernando	26,766
14	Polk	26,494
15	Citrus Levy Marion	25,219
16	North Central Florida	23,495
17	Escarosa	22,097
18	Capital Region	17,947
19	Okaloosa Walton	10,460
20	Gulf Coast	9,401
21	Heartland	7,930
22	Florida Crown	6,255
23	Chipola	4,331
24	North Florida	3,970

Source: County Business Patterns: 2015

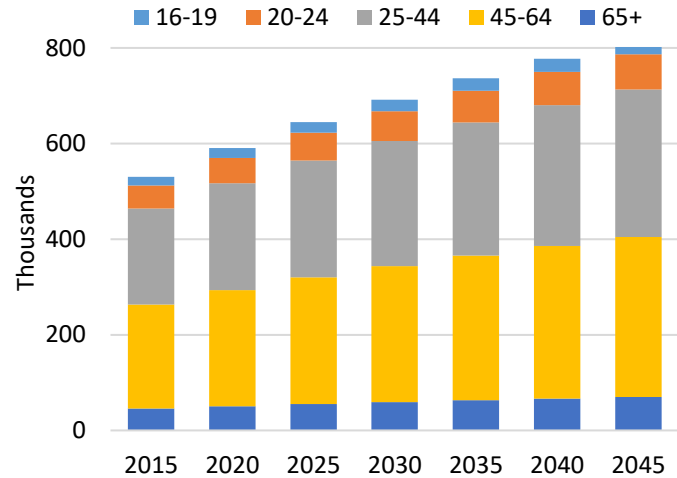
# Workforce Profile

Many companies choose to operate in Southwest Florida due to its workforce. Of the region's adult population, 26 percent have a Bachelor's Degree or higher, while 86 percent have at least a high school diploma. Florida Gulf Coast University conferred 2,331 Bachelor's Degrees to students during the 2015-2016 academic year, while Florida Southwestern State College, with its four campuses throughout the region, conferred 1,942 Associate's Degrees and 341 Bachelor's Degrees during the 2014-2015 academic year. Other educational institutions serving the area include Hodges University in Naples and Kaiser University in Fort Myers. Meanwhile, regional training programs, such as CareerSource Florida, provide training programs and certificates in numerous areas. Furthermore, the composition of the workforce is expected to change as the population grows over the next 25 years. Southwest Florida's population is expected to grow 50 percent by 2045, expanding the region's customer base while increasing its labor force by 54 percent.

## Educational Attainment



## Projected Labor Force



## Health and Wellness Occupations By Total Employed

Occupation	Total Working Across All Industries	Number of Available Applicants	Number of Graduates	Entry Wage	Median Wage	Experienced Wage	Education Level
Registered Nurses	9,364	115	498	\$24.20	\$29.49	\$33.75	Some College
Licensed Practical and Licensed Vocational Nurses	2,900	73	14	\$16.40	\$20.89	\$22.96	PSAV
Medical Assistants	2,528	110	113	\$12.60	\$15.18	\$16.83	PSAV
Pharmacy Technicians	1,390	18	51	\$11.09	\$13.96	\$15.78	PSAV
Personal Care Aides	1,043	29	0	\$8.94	\$10.42	\$11.47	PSAV
Pharmacists	962	2	0	\$51.20	\$59.12	\$61.94	Master's Degree or Higher
Medical Secretaries	959	60	19	\$12.25	\$14.56	\$16.66	PSAV
Dental Assistants	903	50	121	\$14.51	\$17.75	\$19.97	PSAV
Physical Therapists	838	2	0	\$29.85	\$40.68	\$52.36	Master's Degree or Higher
Radiologic Technologists	778	3	149	\$22.04	\$27.94	\$32.99	PSAV
Dental Hygienists	693	9	18	\$25.86	\$33.26	\$37.23	Some College
Dentists, General	672	1	0	\$25.81	\$61.03	\$90.18	Master's Degree or Higher
Emergency Medical Technicians and Paramedics	665	10	302	\$13.88	\$17.81	\$20.99	Some College
Medical and Health Services Managers	665	28	16	\$36.22	\$47.99	\$66.46	Bachelor's Degree
Health Technologists and Technicians, All Other	456	7	0	\$13.42	\$18.22	\$26.11	PSAV
Medical Records and Health Information Technicians	439	37	35	\$12.88	\$17.62	\$21.36	Some College
Medical and Clinical Laboratory Technologists	433	3	0	\$22.97	\$27.73	\$30.60	Some College
Healthcare Social Workers	431	12	0	\$18.60	\$23.25	\$27.46	Master's Degree or Higher
Respiratory Therapists	386	6	33	\$23.26	\$26.66	\$28.00	Some College
Physician Assistants	386	1	0	\$37.47	\$48.77	\$56.04	Bachelor's Degree

Source: Florida Department of Economic Opportunity, Occupational Supply/Demand Report



# Cluster Highlights

## KEY COMPANY ANNOUNCEMENTS

- The field of oncoplastic surgery has been used in Europe for years. It combines oncology care and plastic surgery for optimal aesthetic results. Recently this started gaining traction with the American Society of Breast Surgeons. The society formed a work group this year to promote oncoplastic surgery. At **21<sup>st</sup> Century Oncology** in SWFL four surgeons, out of a total of 17 for the entire state, are trained and certified in this type of surgery, using this technique since early 2017.
- **Healthcare Network of Southwest Florida** and Senior Friendship Health Center opened a 6,000-square foot complex in January 2016 servicing about 1,500 patients. The shared site is for patients 50 and older only and offers 12 medical exam and three dental rooms. The network provides both primary care and specialty services with large discounts on prescriptions. An additional benefit of this network for Southwest Florida is that it offers training and jobs for Florida State University students attending its College of Medicine geriatric division.
- Over \$340 million is being invested into the expansion of the **Gulf Coast Medical Center**. The expansion will add 367,500 square feet to the existing 531,000 square foot facility, and is expected to be completed by 2021.
- **Radiology Regional Center's** offers one of the comprehensive women's imaging services, which includes the Mobile Mammography coach. The provision of such coaches offers convenient access for health service at various locations, such as businesses and shopping plazas for on-site mammograms. Maintaining wellness helps curb healthcare costs and with such state of the art technology, women have little excuse for avoiding such life-saving screening.
- **Accu-care nursing service** continues to offer the elderly companion services around the clock, which includes cooking, cleaning and transportation. With Southwest Florida's large senior population, such services are increasing in demand, providing many varied employment opportunities. One of the services provided is an elderly help line, covering the counties of Charlotte, Collier, Glades, Hendry and Lee.
- **Shellpoint Retirement Community** is one of the largest, upscale, lifecare facilities in the state of Florida, employing over two thousand workers just in the Fort Myers area of SWFL. A unique offering at the facility is their concert series, a performing arts series, the Southwest Florida symphony series and lecture series.
- **NCH** healthcare system has applied the theories of behavioral economics by spreading the "mantra" that healthy people spend less on healthcare which in turn reduces healthcare costs. As an example, NCH stopped hiring smokers in 2011, resulting in a drop in the smoking rate of its employees. NCH has not raised its healthcare premiums for four years in Naples and five years in Collier County. Additionally, NCH has been offering educational seminars on well-being and healthy habits, as well as subjects such as stress reduction, child rearing and financial planning with noticeable positive results in the health and wellness of their employees. Their cafeterias have also begun to offer healthy food choices and in 2016 they removed sugar sweetened beverages from all cafeterias and vending machines.
- **Physicians Regional Healthcare System** opened a new clinic in East Naples that will feature extended access to their walk-in clinic, staffed by primary care and specialty physicians.

## EVENTS, AWARDS AND RECOGNITIONS

- **Shell Point Retirement Community** was awarded the National Five-Star Rating from The Centers for Medicare and Medicaid Services (CMS); *U.S. News & World Report*: Best Nursing Homes in Florida 2015 and by the *Gulfshore Business* Best of Business: Best Retirement Community.
- **Lee Memorial Hospital and HealthPark Medical Center** earned the recognition as a 2017 Best Regional Hospital, ranking 14th out of over 250 hospitals in Florida by U.S. News & World Report.
- **Lee Health** ranked 29th out of 500 companies recognized in *Forbe's* magazine "America's Best Employers 2017" list, while also ranking as the second highest organization in Florida.
- **Physicians Regional Healthcare System** received the American Heart Association/American Stroke Association's 2017 *Get With The Guidelines - Stroke Gold Plus Quality Achievement Award*. The award recognizes the hospital's commitment to providing the most appropriate stroke treatment according to nationally recognized, research-based guidelines based on the latest scientific evidence.
- **Physicians Regional Healthcare System** received accreditation for its Chest Pain Center in Naples.

- The **Lee Health Foundation** was recognized as a High Performer by the Association for Healthcare Philanthropy for the third consecutive year. The foundation was one of 51 organizations to receive the award.

## Companies

- 21<sup>st</sup> Century Oncology  
[www.21co.com](http://www.21co.com)
- Adventist Health System Home Care  
[www.adventisthealthsys](http://www.adventisthealthsys)
- Accu-Care Nursing Service Inc.  
[www.accu-care.net](http://www.accu-care.net)
- Arbor Trace  
[www.arbortrace.com](http://www.arbortrace.com)
- Physicians Regional Medical Centers  
[www.physiciansregional.com](http://www.physiciansregional.com)
- Family Health Centers of SW FL Inc  
[www.fhcswf.org](http://www.fhcswf.org)
- Radiology Regional Center  
[www.radiologyregional.com](http://www.radiologyregional.com)
- Signature Healthcare of College Park  
[www.shcatcollegepark.com](http://www.shcatcollegepark.com)
- Shell Point Retirement Community  
[www.shellpoint.org](http://www.shellpoint.org)
- NCH Healthcare System  
[www.nchmd.org](http://www.nchmd.org)

## Education & Training

Florida's system of higher and post-secondary education provides hundreds of training programs generating advanced degrees and occupational certificates that prepare students for productive careers in our region. The state university system includes 13 institutions, while community colleges number 28. Furthermore, there are 84 private universities and occupational and technical schools in the state. A list of the top educational institutions producing graduates that work in the health and wellness cluster would include the following:

- Florida Gulf Coast University  
[www.fgcu.edu](http://www.fgcu.edu)
- Hodges University  
[www.hodges.edu](http://www.hodges.edu)
- Rasmussen College  
[www.rasmussen.edu](http://www.rasmussen.edu)
- Broward College  
[www.broward.edu](http://www.broward.edu)
- University of Miami  
[www.miami.edu](http://www.miami.edu)
- Florida State University  
[www.fsu.edu](http://www.fsu.edu)
- University of Central Florida  
[www.ucf.edu](http://www.ucf.edu)
- Florida SouthWestern State College  
[www.fsw.edu](http://www.fsw.edu)
- Keiser University  
[www.keiseruniversity.edu](http://www.keiseruniversity.edu)
- Florida Atlantic University  
[www.fau.edu](http://www.fau.edu)
- Florida International University  
[www.fiu.edu](http://www.fiu.edu)
- Miami-Dade College  
[www.mdc.edu](http://www.mdc.edu)
- University of Florida  
[www.ufl.edu](http://www.ufl.edu)
- University of South Florida  
[www.usf.edu](http://www.usf.edu)

# Cluster Definition

The health and wellness cluster is comprised of 35 six-digit NAICS codes that form eight subclusters. A list of each subcluster and NAICS category, along with the appropriate six-digit NAICS codes, can be found in the table below.

Health and Wellness Breakdown of Subclusters	
Subcluster/NAICS Description	6-Digit NAICS Code
<i>Healthcare Provider Offices</i>	
Offices of Physicians (except Mental Health Specialists)	621111
Offices of Physicians, Mental Health Specialists	621112
Offices of Dentists	621210
Offices of Chiropractors	621310
Offices of Optometrists	621320
Offices of Mental Health Practitioners (except Physicians)	621330
Offices of Physical, Occupational and Speech Therapists, and Audiologists	621340
Offices of Podiatrists	621391
Offices of All Other Miscellaneous Health Practitioners	621399
Family Planning Centers	621410
Outpatient Mental Health and Substance Abuse Centers	621420
HMO Medical Centers	621491
Kidney Dialysis Centers	621492
Freestanding Ambulatory Surgical and Emergency Centers	621493
All Other Outpatient Care Centers	621498
Blood and Organ Banks	621991
All Other Miscellaneous Ambulatory Health Care Services	621999
<i>Hospitals</i>	
General Medical and Surgical Hospitals	622110
Psychiatric and Substance Abuse Hospitals	622210
Specialty (except Psychiatric and Substance Abuse) Hospitals	622310
<i>Medical Laboratories</i>	
Dental Laboratories	339116
Medical Laboratories	621511
Diagnostic Imaging Centers	621512
<i>Home and Residential Care</i>	
Home Health Care Services	621610
Nursing Care Facilities	623110
Residential Mental Retardation Facilities	623210
Residential Mental Health and Substance Abuse Facilities	623220
Continuing Care Retirement Communities	623311
Homes for the Elderly	623312
Other Residential Care Facilities	623990
<i>Funeral Service and Crematories</i>	
Funeral Homes and Funeral Services	812210
Cemeteries and Crematories	812220
<i>Medical Equipment Distribution and Rental</i>	
Home Health Equipment Rental	532291
<i>Drug Stores</i>	
Pharmacies and Drug Stores	446110
<i>Optical Goods Retailing</i>	
Optical Goods Stores	446130

