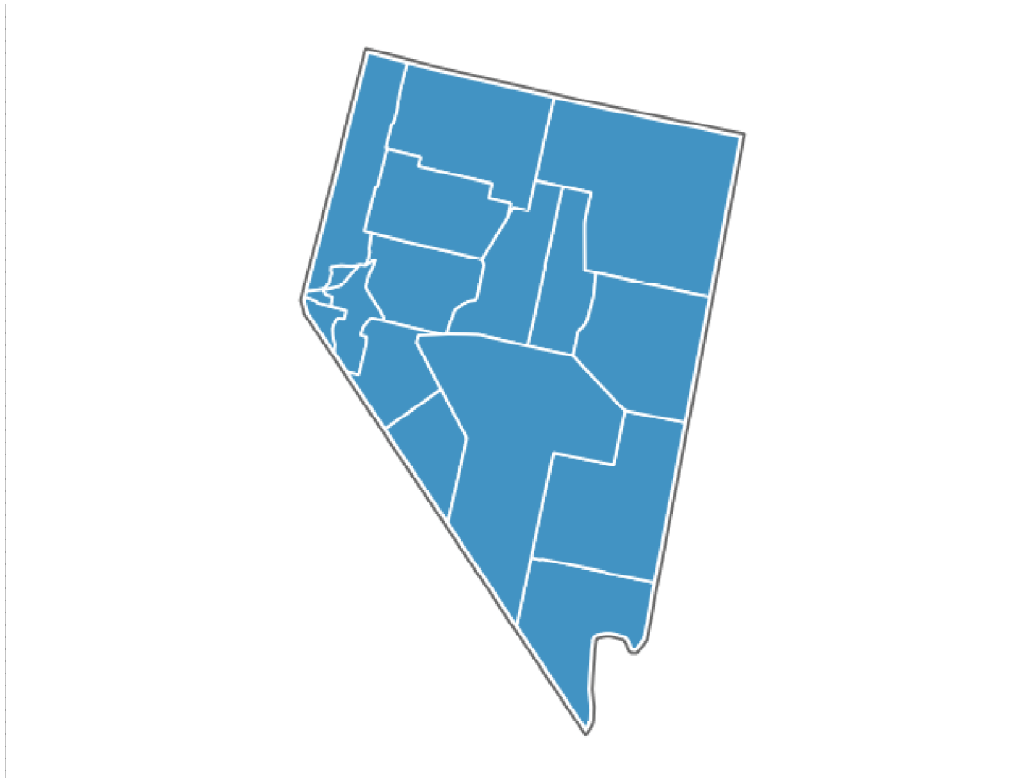


Nevada's Health and Medical Services Sector



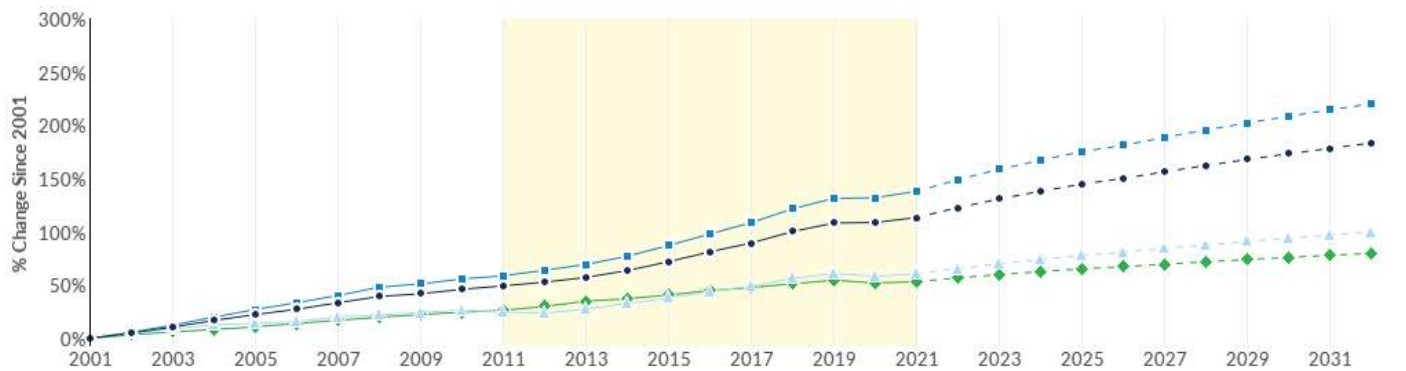
Industry Summary for Health and Medical Services

| | | |
|--|--|--|
| 131,247 Jobs (2021) 27% below National average | 43.0% % Change (2011-2021) Nation: 21.3% | \$75,268 Avg. Earnings Per Job (2021) Nation: \$75,195 |
|--|--|--|

Industry Detail

| | |
|-------------------------------------|----------------------------|
| Payrolled Business Locations (2021) | 7,806 |
| Jobs Multiplier | 2 |
| Unemployed | Only Available for 2-Digit |

Regional Trends



| | Region | 2011 Jobs | 2021 Jobs | Change | % Change |
|---|----------------------------------|------------|------------|-----------|----------|
| ● | Nevada | 91,805 | 131,247 | 39,442 | 43.0% |
| ● | Las Vegas-Henderson-Paradise, NV | 63,783 | 95,676 | 31,893 | 50.0% |
| ● | Reno, NV | 19,199 | 24,747 | 5,548 | 28.9% |
| ● | United States | 16,487,135 | 20,004,399 | 3,517,264 | 21.3% |

Regional Breakdown of Nevada's Health and Medical Services Sector

| Region | Jobs (2011) | Jobs (2021) | Change | Job Change % | Earnings (2021) | Jobs LQ (2021) |
|---------------------|-------------|-------------|------------|--------------|-----------------|----------------|
| Clark County | 63,783 | 95,676 | 31,893 | 50% | \$74,554 | 0.75 |
| Washoe County | 19,187 | 24,631 | 5,444 | 28% | \$79,970 | 0.82 |
| Carson City County | 3,751 | 4,726 | 975 | 26% | \$76,058 | 1.16 |
| Elko County | 1,211 | 1,516 | 304 | 25% | \$66,737 | 0.52 |
| Douglas County | 1,215 | 1,427 | 212 | 17% | \$76,053 | 0.53 |
| Nye County | 756 | 1,102 | 346 | 46% | \$59,527 | 0.63 |
| Churchill County | 729 | 889 | 160 | 22% | \$66,479 | 0.66 |
| Lyon County | 631 | 591 | (40) | (6%) | \$62,443 | 0.32 |
| Humboldt County | 201 | 209 | 8 | 4% | \$50,232 | 0.20 |
| White Pine County | 137 | 134 | (3) | (2%) | \$52,419 | 0.23 |
| County not reported | 30 | 127 | 97 | 319% | \$137,847 | 0.05 |
| Storey County | 12 | 116 | 104 | 864% | \$44,175 | 0.05 |
| Lincoln County | 62 | 49 | (13) | (22%) | \$33,657 | 0.25 |
| Mineral County | 26 | 25 | (1) | (3%) | \$74,474 | 0.11 |
| Lander County | 37 | 25 | (11) | (31%) | \$52,937 | 0.05 |
| Pershing County | 28 | <10 | Insf. Data | Insf. Data | Insf. Data | 0.02 |
| Esmeralda County | 0 | 0 | 0 | 0% | \$0 | 0.00 |
| Eureka County | <10 | 0 | Insf. Data | Insf. Data | \$0 | 0.00 |
| | 91,805 | 131,247 | 39,442 | 43% | \$75,268 | |

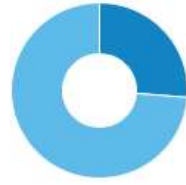
Top Occupations Employed in these Industries

| Description | Employed in Industry Group (2021) | % of Total Jobs in Industry Group (2021) |
|--------------------------------------|-----------------------------------|--|
| Registered Nurses | 18,785 | 14.3% |
| Home Health and Personal Care Aides | 15,254 | 11.6% |
| Medical Assistants | 7,160 | 5.5% |
| Nursing Assistants | 6,161 | 4.7% |
| Receptionists and Information Clerks | 3,890 | 3.0% |

Industry Requirements (Top Supply Chain)

| Purchases from | In-region Purchases | Imported Purchases | Total Purchases |
|--|---------------------|--------------------|-----------------|
| Corporate, Subsidiary, and Regional Managing Offices | \$371,152,908 | \$36,125,120 | \$407,278,028 |
| Direct Property and Casualty Insurance Carriers | \$115,613,926 | \$189,757,328 | \$305,371,254 |
| Direct Health and Medical Insurance Carriers | \$187,487,699 | \$52,819,845 | \$240,307,543 |
| Temporary Help Services | \$180,675,871 | \$49,253,947 | \$229,929,818 |
| Lessors of Residential Buildings and Dwellings | \$175,139,984 | \$27,143,584 | \$202,283,568 |

Industry Gender Breakdown



| | Gender | 2021 Jobs | 2021 Percent |
|---|---------|-----------|--------------|
| • | Males | 34,471 | 26.3% |
| • | Females | 96,776 | 73.7% |

Industry Age Breakdown



| | Age | 2021 Jobs | 2021 Percent |
|---|-------|-----------|--------------|
| • | 14-18 | 628 | 0.5% |
| • | 19-24 | 10,425 | 7.9% |
| • | 25-34 | 32,276 | 24.6% |
| • | 35-44 | 31,515 | 24.0% |
| • | 45-54 | 27,433 | 20.9% |
| • | 55-64 | 20,474 | 15.6% |
| • | 65+ | 8,496 | 6.5% |

Industry Race/Ethnicity Breakdown



| | Race/Ethnicity | 2021 Jobs | 2021 Percent | |
|---|---|-----------|--------------|-----------------------------------|
| • | White | 61,178 | 46.6% | <div style="width: 46.6%;"></div> |
| • | Hispanic or Latino | 28,246 | 21.5% | <div style="width: 21.5%;"></div> |
| • | Asian | 21,648 | 16.5% | <div style="width: 16.5%;"></div> |
| • | Black or African American | 15,138 | 11.5% | <div style="width: 11.5%;"></div> |
| • | Two or More Races | 3,554 | 2.7% | <div style="width: 2.7%;"></div> |
| • | Native Hawaiian or Other Pacific Islander | 810 | 0.6% | <div style="width: 0.6%;"></div> |
| • | American Indian or Alaska Native | 673 | 0.5% | <div style="width: 0.5%;"></div> |

Industry Breakdown of Nevada's Health and Medical Services Sector

| NAICS | Description | 2011 Jobs | 2021 Jobs | 2011 - 2021 Change | Avg. Earnings Per Job | 2021 Location Quotient |
|--------|---|-----------|-----------|--------------------|-----------------------|------------------------|
| 622110 | General Medical and Surgical Hospitals | 21,401 | 30,217 | 8,816 | \$91,783 | 0.70 |
| 621111 | Offices of Physicians (except Mental Health Specialists) | 17,100 | 22,826 | 5,726 | \$116,233 | 0.94 |
| 624120 | Services for the Elderly and Persons with Disabilities | 7,022 | 12,369 | 5,346 | \$24,013 | 0.65 |
| 621210 | Offices of Dentists | 7,606 | 9,723 | 2,117 | \$66,595 | 1.06 |
| 623110 | Nursing Care Facilities (Skilled Nursing Facilities) | 5,693 | 7,051 | 1,358 | \$57,367 | 0.55 |
| 621610 | Home Health Care Services | 5,320 | 6,363 | 1,043 | \$62,848 | 0.45 |
| 621340 | Offices of Physical, Occupational and Speech Therapists, and Audiologists | 2,070 | 3,424 | 1,354 | \$60,247 | 0.91 |
| 623312 | Assisted Living Facilities for the Elderly | 2,065 | 2,868 | 802 | \$37,733 | 0.71 |
| 624190 | Other Individual and Family Services | 1,768 | 2,519 | 751 | \$53,540 | 0.55 |
| 622310 | Specialty (except Psychiatric and Substance Abuse) Hospitals | 2,078 | 2,499 | 420 | \$75,362 | 1.16 |
| 621511 | Medical Laboratories | 1,675 | 2,392 | 717 | \$78,747 | 1.16 |
| 621512 | Diagnostic Imaging Centers | 1,180 | 2,319 | 1,138 | \$81,805 | 3.11 |
| 621493 | Freestanding Ambulatory Surgical and Emergency Centers | 1,394 | 2,191 | 797 | \$67,740 | 1.37 |
| 621910 | Ambulance Services | 1,295 | 1,971 | 676 | \$67,004 | 1.22 |
| 621320 | Offices of Optometrists | 1,076 | 1,855 | 779 | \$58,406 | 1.36 |
| 623220 | Residential Mental Health and Substance Abuse Facilities | 995 | 1,720 | 725 | \$48,969 | 0.81 |
| 621310 | Offices of Chiropractors | 996 | 1,579 | 582 | \$51,586 | 1.09 |
| 621330 | Offices of Mental Health Practitioners (except Physicians) | 557 | 1,452 | 895 | \$48,221 | 0.90 |
| 621498 | All Other Outpatient Care Centers | 321 | 1,432 | 1,111 | \$62,337 | 0.72 |
| 621399 | Offices of All Other Miscellaneous Health Practitioners | 840 | 1,430 | 590 | \$72,591 | 0.90 |
| 623210 | Residential Intellectual and Developmental Disability Facilities | 943 | 1,405 | 462 | \$31,689 | 0.40 |
| 621492 | Kidney Dialysis Centers | 847 | 1,403 | 555 | \$80,371 | 1.10 |
| 623311 | Continuing Care Retirement Communities | 987 | 1,355 | 368 | \$41,531 | 0.32 |
| 622210 | Psychiatric and Substance Abuse Hospitals | 915 | 1,352 | 437 | \$60,958 | 1.21 |
| 621491 | HMO Medical Centers | 909 | 1,100 | 191 | \$101,350 | 0.59 |

| | | | | | | |
|--------|--|--------|---------|------------|-----------|------|
| 621991 | Blood and Organ Banks | 655 | 996 | 341 | \$63,617 | 1.38 |
| 621420 | Outpatient Mental Health and Substance Abuse Centers | 398 | 928 | 530 | \$54,619 | 0.37 |
| 325412 | Pharmaceutical Preparation Manufacturing | 464 | 762 | 298 | \$76,566 | 0.39 |
| 532283 | Home Health Equipment Rental | 668 | 553 | (115) | \$68,312 | 1.77 |
| 623990 | Other Residential Care Facilities | 480 | 481 | 2 | \$46,576 | 0.34 |
| 621999 | All Other Miscellaneous Ambulatory Health Care Services | 443 | 436 | (7) | \$78,737 | 0.52 |
| 621112 | Offices of Physicians, Mental Health Specialists | 231 | 433 | 202 | \$105,972 | 0.65 |
| 325411 | Medicinal and Botanical Manufacturing | <10 | 387 | Insf. Data | \$75,102 | 1.16 |
| 339116 | Dental Laboratories | 361 | 373 | 12 | \$60,749 | 0.87 |
| 621391 | Offices of Podiatrists | 239 | 268 | 29 | \$48,352 | 0.87 |
| 541714 | Research and Development in Biotechnology (except Nanobiotechnology) | 159 | 190 | 31 | \$177,477 | 0.09 |
| 621410 | Family Planning Centers | 105 | 169 | 64 | \$66,059 | 0.62 |
| 339112 | Surgical and Medical Instrument Manufacturing | 196 | 155 | (41) | \$84,269 | 0.13 |
| 339113 | Surgical Appliance and Supplies Manufacturing | 117 | 151 | 34 | \$94,377 | 0.16 |
| 541713 | Research and Development in Nanotechnology | 14 | 56 | 43 | \$117,575 | 0.26 |
| 339115 | Ophthalmic Goods Manufacturing | 180 | 55 | (125) | \$68,289 | 0.26 |
| 339114 | Dental Equipment and Supplies Manufacturing | <10 | 38 | Insf. Data | \$60,614 | 0.27 |
| 325414 | Biological Product (except Diagnostic) Manufacturing | 0 | 0 | 0 | \$0 | 0.00 |
| 325413 | In-Vitro Diagnostic Substance Manufacturing | 26 | 0 | (26) | \$0 | 0.00 |
| | | 91,805 | 131,247 | 39,442 | \$75,268 | |

Data Sources and Calculations

Industry Data

Emsi industry data have various sources depending on the class of worker. (1) For QCEW Employees, Emsi primarily uses the QCEW (Quarterly Census of Employment and Wages), with supplemental estimates from County Business Patterns. (2) Non-QCEW employees data are based on a number of sources including QCEW, Current Employment Statistics, County Business Patterns, BEA State and Local Personal Income reports, the National Industry-Occupation Employment Matrix (NIOEM), the American Community Survey, and Railroad Retirement Board statistics. (3) Self-Employed and Extended Proprietor classes of worker data are primarily based on the American Community Survey, Nonemployer Statistics, and BEA State and Local Personal Income Reports. Projections for QCEW and Non-QCEW Employees are informed by NIOEM and long-term industry projections published by individual states.

Input-Output Data

The input-output model in this report is Emsi's gravitational flows multi-regional social account matrix model (MR-SAM). It is based on data from the Census Bureau's Current Population Survey and American Community Survey; as well as the Bureau of Economic Analysis' National Income and Product Accounts, Input-Output Make and Use Tables, and Gross State Product data. In addition, several Emsi in-house data sets are used, as well as data from Oak Ridge National Labs on the cost of transportation between counties.

Staffing Patterns Data

The staffing pattern data in this report are compiled from several sources using a specialized process. For QCEW and Non-QCEW Employees classes of worker, sources include Occupational Employment Statistics, the National Industry-Occupation Employment Matrix, and the American Community Survey. For the Self-Employed and Extended Proprietors classes of worker, the primary source is the American Community Survey, with a small amount of information from Occupational Employment Statistics.

State Data Sources

This report uses state data from the following agencies: Nevada Department of Employment, Training and Rehabilitation