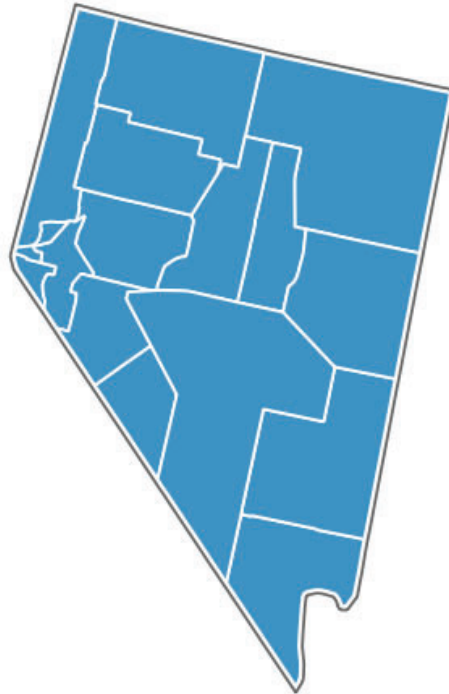


Nevada's Health and Medical Services Sector



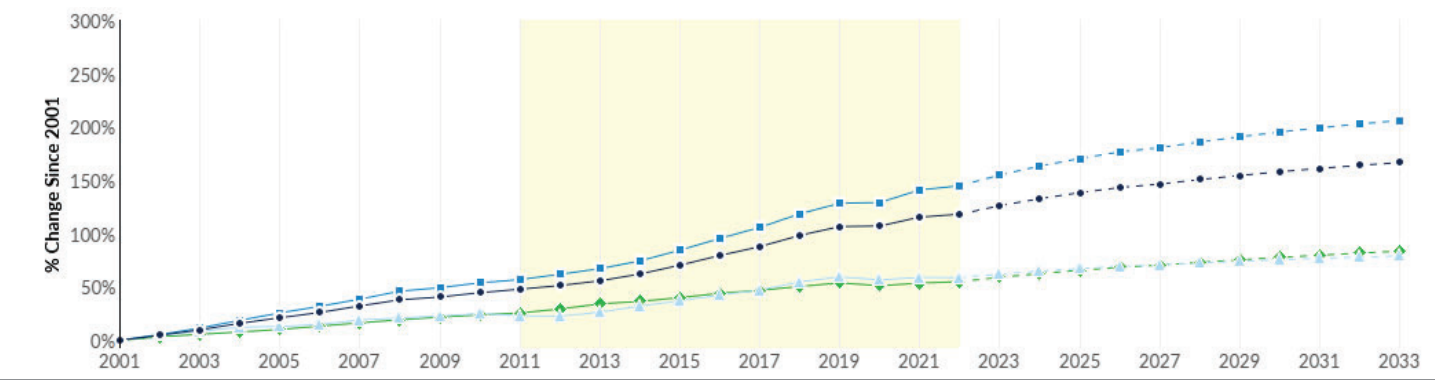
Industry Summary for Health and Medical Services

| | | |
|--|--|--|
| 135,456 Jobs (2022) 30% below National average | 47.6% % Change (2011-2022) Nation: 23.4% | \$80,115 Avg. Earnings Per Job (2022) Nation: \$80,086 |
|--|--|--|

Industry Detail

| | |
|-------------------------------------|-------|
| Payrolled Business Locations (2022) | 8,151 |
| Jobs Multiplier | N/A |

Regional Trends



| | Region | 2011 Jobs | 2022 Jobs | Change | % Change |
|---|---------------------|------------|------------|-----------|----------|
| ● | Nevada | 91,802 | 135,456 | 43,654 | 47.6% |
| ● | Las Vegas, NV Metro | 64,229 | 100,262 | 36,033 | 56.1% |
| ● | Reno, NV Metro | 19,053 | 24,579 | 5,526 | 29.0% |
| ● | United States | 16,496,766 | 20,362,638 | 3,865,872 | 23.4% |

Regional Breakdown of Nevada's Health and Medical Services Sector

| County | Jobs (2011) | Jobs (2022) | 2011 - 2022 Job Change | Job Change % | Earnings (2022) | Jobs LQ (2022) |
|-------------------------------|-------------|-------------|------------------------|--------------|-----------------|----------------|
| Clark County | 64,229 | 100,262 | 36,033 | 56% | \$78,775 | 0.72 |
| Washoe County | 19,042 | 24,460 | 5,418 | 28% | \$86,766 | 0.80 |
| Carson City County | 3,668 | 4,299 | 630 | 17% | \$83,798 | 1.13 |
| Elko County | 1,178 | 1,515 | 337 | 29% | \$68,635 | 0.54 |
| Douglas County | 1,122 | 1,445 | 323 | 29% | \$78,399 | 0.58 |
| Nye County | 722 | 1,089 | 367 | 51% | \$65,668 | 0.66 |
| Churchill County | 720 | 847 | 127 | 18% | \$74,437 | 0.65 |
| Lyon County | 606 | 556 | (50) | (8%) | \$60,290 | 0.31 |
| [Nevada, county not reported] | 30 | 448 | 418 | 1372% | \$130,063 | 0.12 |
| Humboldt County | 194 | 194 | 0 | 0% | \$54,191 | 0.20 |
| White Pine County | 133 | 137 | 4 | 3% | \$54,676 | 0.25 |
| Storey County | 10 | 119 | 108 | 1043% | \$51,014 | 0.05 |
| Lincoln County | 61 | 43 | (19) | (30%) | \$34,950 | 0.24 |
| Mineral County | 24 | 15 | (9) | (37%) | \$61,933 | 0.07 |
| Lander County | 29 | 13 | (15) | (53%) | \$49,419 | 0.03 |
| Esmeralda County | 0 | <10 | Insf. Data | Insf. Data | Insf. Data | 0.13 |
| Pershing County | 23 | <10 | Insf. Data | Insf. Data | Insf. Data | 0.03 |
| Eureka County | <10 | 0 | Insf. Data | Insf. Data | \$0 | 0.00 |
| | 91,802 | 135,456 | 43,654 | 47.6% | \$80,115 | |

Top Occupations Employed in these Industries

| Description | Employed in Industry Group (2022) | % of Total Jobs in Industry Group (2022) |
|--------------------------------------|-----------------------------------|--|
| Registered Nurses | 19,625 | 14.5% |
| Home Health and Personal Care Aides | 14,166 | 10.5% |
| Medical Assistants | 8,174 | 6.0% |
| Nursing Assistants | 7,102 | 5.2% |
| Receptionists and Information Clerks | 4,470 | 3.3% |

Industry Requirements (Top Supply Chain)

| Purchases from | In-region Purchases | Imported Purchases | Total Purchases |
|--|---------------------|--------------------|-----------------|
| Corporate, Subsidiary, and Regional Managing Offices | \$371,299,571 | \$36,063,914 | \$407,363,486 |
| Direct Property and Casualty Insurance Carriers | \$115,658,957 | \$189,842,630 | \$305,501,587 |
| Direct Health and Medical Insurance Carriers | \$187,622,436 | \$52,715,824 | \$240,338,261 |
| Temporary Help Services | \$180,666,619 | \$49,582,384 | \$230,249,003 |
| Lessors of Residential Buildings and Dwellings | \$175,049,086 | \$27,229,717 | \$202,278,803 |

Industry Gender Breakdown



| | Gender | 2022 Jobs | 2022 Percent | |
|---|---------|-----------|--------------|--|
| • | Males | 36,761 | 27.1% | |
| • | Females | 98,695 | 72.9% | |

Industry Age Breakdown



| | Age | 2022 Jobs | 2022 Percent | |
|---|-------|-----------|--------------|--|
| • | 14-18 | 790 | 0.6% | |
| • | 19-24 | 10,880 | 8.0% | |
| • | 25-34 | 32,809 | 24.2% | |
| • | 35-44 | 33,082 | 24.4% | |
| • | 45-54 | 28,295 | 20.9% | |
| • | 55-64 | 20,782 | 15.3% | |
| • | 65+ | 8,818 | 6.5% | |

Industry Race/Ethnicity Breakdown



| | Race/Ethnicity | 2022 Jobs | 2022 Percent | |
|---|---|-----------|--------------|------------|
| ● | White | 62,263 | 46.0% | ██████████ |
| ● | Hispanic or Latino | 30,030 | 22.2% | ██████ |
| ● | Asian | 22,715 | 16.8% | ████ |
| ● | Black or African American | 15,049 | 11.1% | ███ |
| ● | Two or More Races | 3,793 | 2.8% | █ |
| ● | Native Hawaiian or Other Pacific Islander | 881 | 0.7% | █ |
| ● | American Indian or Alaska Native | 724 | 0.5% | █ |

Industry Breakdown of Nevada's Health and Medical Services Sector

| NAICS | Description | 2011 Jobs | 2022 Jobs | 2011 - 2022 Change | Avg. Earnings Per Job | 2022 Location Quotient |
|--------|---|-----------|-----------|--------------------|-----------------------|------------------------|
| 621512 | Diagnostic Imaging Centers | 1,221 | 2,285 | 1,064 | \$87,377 | 2.80 |
| 532283 | Home Health Equipment Rental | 668 | 567 | (101) | \$70,115 | 1.73 |
| 621991 | Blood and Organ Banks | 584 | 1,244 | 659 | \$64,767 | 1.57 |
| 621493 | Freestanding Ambulatory Surgical and Emergency Centers | 1,340 | 2,262 | 922 | \$69,700 | 1.28 |
| 621320 | Offices of Optometrists | 1,076 | 1,919 | 842 | \$59,427 | 1.28 |
| 621910 | Ambulance Services | 1,259 | 2,056 | 796 | \$74,734 | 1.25 |
| 622210 | Psychiatric and Substance Abuse Hospitals | 915 | 1,384 | 468 | \$64,857 | 1.18 |
| 621511 | Medical Laboratories | 1,707 | 2,557 | 849 | \$86,641 | 1.09 |
| 325411 | Medicinal and Botanical Manufacturing | <10 | 415 | Insf. Data | \$77,544 | 1.08 |
| 622310 | Specialty (except Psychiatric and Substance Abuse) Hospitals | 2,078 | 2,453 | 375 | \$81,889 | 1.07 |
| 621310 | Offices of Chiropractors | 996 | 1,666 | 670 | \$52,027 | 1.04 |
| 621210 | Offices of Dentists | 7,606 | 10,271 | 2,665 | \$67,445 | 1.02 |
| 621492 | Kidney Dialysis Centers | 805 | 1,296 | 491 | \$82,590 | 0.96 |
| 621330 | Offices of Mental Health Practitioners (except Physicians) | 557 | 1,794 | 1,237 | \$50,529 | 0.93 |
| 621111 | Offices of Physicians (except Mental Health Specialists) | 17,098 | 24,232 | 7,134 | \$119,856 | 0.92 |
| 621340 | Offices of Physical, Occupational and Speech Therapists, and Audiologists | 2,070 | 3,863 | 1,793 | \$61,277 | 0.91 |
| 339116 | Dental Laboratories | 381 | 433 | 53 | \$64,464 | 0.87 |
| 621391 | Offices of Podiatrists | 233 | 274 | 41 | \$50,294 | 0.86 |
| 621399 | Offices of All Other Miscellaneous Health Practitioners | 846 | 1,553 | 707 | \$76,304 | 0.81 |
| 623220 | Residential Mental Health and Substance Abuse Facilities | 995 | 1,736 | 741 | \$55,250 | 0.78 |
| 621498 | All Other Outpatient Care Centers | 505 | 1,474 | 969 | \$65,525 | 0.68 |
| 622110 | General Medical and Surgical Hospitals | 21,401 | 30,455 | 9,054 | \$99,229 | 0.67 |
| 621112 | Offices of Physicians, Mental Health Specialists | 233 | 471 | 238 | \$117,754 | 0.66 |
| 623312 | Assisted Living Facilities for the Elderly | 2,073 | 2,710 | 637 | \$42,812 | 0.64 |
| 624120 | Services for the Elderly and Persons with Disabilities | 7,023 | 12,580 | 5,557 | \$24,838 | 0.60 |

| | | | | | | |
|--------|--|--------|---------|------------|------------|------|
| 621999 | All Other Miscellaneous Ambulatory Health Care Services | 476 | 604 | 127 | \$89,384 | 0.60 |
| 621410 | Family Planning Centers | 68 | 145 | 78 | \$72,605 | 0.54 |
| 624190 | Other Individual and Family Services | 1,769 | 2,820 | 1,051 | \$54,313 | 0.53 |
| 623110 | Nursing Care Facilities (Skilled Nursing Facilities) | 5,693 | 6,686 | 992 | \$63,567 | 0.52 |
| 621491 | HMO Medical Centers | 909 | 967 | 57 | \$113,612 | 0.47 |
| 621610 | Home Health Care Services | 5,320 | 6,611 | 1,291 | \$67,909 | 0.44 |
| 623210 | Residential Intellectual and Developmental Disability Facilities | 944 | 1,357 | 413 | \$39,564 | 0.38 |
| 325412 | Pharmaceutical Preparation Manufacturing | 464 | 800 | 336 | \$83,037 | 0.37 |
| 621420 | Outpatient Mental Health and Substance Abuse Centers | 348 | 1,019 | 671 | \$60,239 | 0.37 |
| 623990 | Other Residential Care Facilities | 477 | 472 | (5) | \$51,146 | 0.32 |
| 623311 | Continuing Care Retirement Communities | 982 | 1,267 | 285 | \$47,680 | 0.30 |
| 339115 | Ophthalmic Goods Manufacturing | 179 | 60 | (119) | \$66,345 | 0.26 |
| 541713 | Research and Development in Nanotechnology | 12 | 49 | 37 | \$469,633 | 0.21 |
| 339113 | Surgical Appliance and Supplies Manufacturing | 110 | 195 | 86 | \$93,828 | 0.20 |
| 339114 | Dental Equipment and Supplies Manufacturing | <10 | 24 | Insf. Data | \$67,438 | 0.15 |
| 339112 | Surgical and Medical Instrument Manufacturing | 192 | 185 | (6) | \$88,705 | 0.14 |
| 541714 | Research and Development in Biotechnology (except Nanobiotechnology) | 156 | 243 | 87 | \$220,647 | 0.09 |
| 325413 | In-Vitro Diagnostic Substance Manufacturing | 26 | <10 | Insf. Data | Insf. Data | 0.01 |
| 325414 | Biological Product (except Diagnostic) Manufacturing | 0 | 0 | 0 | \$0 | 0.00 |
| | | 91,802 | 135,456 | 43,654 | \$80,115 | |

Data Sources and Calculations

Industry Data

Lightcast industry data have various sources depending on the class of worker. (1) For QCEW Employees, Lightcast 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 Lightcast'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 Lightcast 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