

JANUARY 2018



LIFE SCIENCES

ANNUAL STATISTICAL REPORT



PACIFIC MOUNTAIN
WORKFORCE
DEVELOPMENT

building community prosperity



The Life Sciences sector includes health care providers such as primary care physicians and hospitals, as well as nursing homes, medical product and pharmaceutical manufacturers and biotechnology research and development.¹

Major Developments in 2017

Medline Industries opens distribution center in Lacey
300 jobs

US Healthvest behavioral health hospital approved by Washington Department of Health
75+ beds, 200 jobs

SeaMar opens 10,000 sq ft clinic in Ocean Shores

Total Sector Employment:
18,568 jobs²

Number of worksites: 925³

Gross Domestic Product:
\$1.524 billion⁴

Average Annual Wage:
\$50,409⁵

More jobs openings are posted in the region for registered nurses and licensed practical nurses than any other occupation.⁶

Over the last five years, the Life Sciences sector has added 1,854 net jobs to the five-county Pacific Mountain regional economy.⁷

MAJOR INDUSTRIES—LIFE SCIENCES SECTOR PACMTN 2016

Industry	Number of Worksites (establishments)	GDP (economic output)	Jobs	Average Annual Wage	Location Quotient ⁸
Ambulatory Health Care ⁹	712	\$692,925,000	8,689	\$52,313	0.87
Hospitals	17	\$614,241,000	6,595	\$59,186	0.81
Nursing & Residential Care	155	\$163,696,000	3,613	\$31,033	0.80
Medical Equipment Manufacturing & Wholesaling	34	\$45,911,000	230	\$63,766	0.35
Pharmaceuticals & Biotechnology	7	\$7,096,000	42	\$96,302	0.07

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INDUSTRY TRENDS

Data analysis done in 2017 shows some interesting trends in this sector, please see the tables below for a data snapshot of industries within the Life Sciences sector.

MEDICAL EQUIPMENT & SUPPLIES MANUFACTURING		
Year	GDP	Jobs
2014	\$12,569,000	169
2015	\$13,829,000	207
2016	\$15,210,000	227

The growth in the local medical device industry has been distributed among many small manufacturers in the region.

GENERAL MEDICAL & SURGICAL HOSPITALS		
Year	GDP	Jobs
2014	\$498,274,000	5,636
2015	\$560,570,000	6,021
2016	\$598,060,000	6,373

Washington Department of Health statistics show that nearly all the general acute care hospitals in the PacMtn region have added FTEs in the last three years, with Providence-St Peter Hospital leading the way.

RESIDENTIAL INTELLECTUAL & DEVELOPMENTAL DISABILITY FACILITIES		
Year	GDP	Jobs
2014	\$9,107,000	223
2015	\$12,796,000	306
2016	\$15,909,000	399

Nearly all the growth in this industry was in Mason and Thurston counties. Providers such as Exceptional Foresters Inc. (EFI), which coordinates care among 16 facilities, have increased hiring in recent years.

OFFICES OF DENTISTS		
Year	GDP	Jobs
2014	\$103,520,000	1,568
2015	\$108,792,000	1,601
2016	\$114,890,000	1,716

Dental practices have outpaced physicians' offices in job growth regionally over the last three years.



Learn more at www.pacmtn.org

Grays Harbor, Lewis, Mason, Pacific, Thurston Counties

WorkSource Washington and PacMtn are equal opportunity employers/programs. Auxiliary aids and services are available upon request to individuals with disabilities. WA Relay 711



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FOOTNOTES

1. The Life Sciences sector is defined by the following NAICS-coded industries: Ambulatory Health Care Services (621), Hospitals (622), Nursing and Residential Care Facilities (623), Hospitals (622), Nursing and Residential Care Facilities (623), Pharmaceutical and Medicine Manufacturing (3254), Medical Equipment and Supplies Manufacturing (3391), Medical, Dental, and Hospital Equipment and Supplies Merchant Wholesalers (42345), Research and Development in Biotechnology (541714).

2. Employment data is derived from the federal Quarterly Census of Employment and Wages (QCEW). The QCEW quarterly and annual data is derived from a complete count of employer tax records and unemployment insurance records. Industry data only includes workers who work for an employer who designates the wood products industry as their primary industry.

3. The U.S. Census Bureau defines "establishments" as "a single physical location where business is conducted or where services or industrial operations are performed." The term "worksites" is used interchangeably here with "establishments."

4. Regional Gross Domestic Product (GDP) is adapted from the U.S. Bureau of Economic Analysis (BEA) RIMS II chart of accounts and applied to data from the combined five-county PacMtn region. The BEA defines GDP as "the value of the goods and services produced by the [region's] economy less the value of the goods and services used up in production."

5. Average annual wage data is from Quarterly Census of Employment and Wages (QCEW) annualized averages of quarterly wage earnings.

6. Employment Security Department/LMPA, Occupational Employment Statistics; The Conference Board, Help Wanted OnLine job announcements, November 2017.

7. U.S. Department of Labor, Bureau of Labor Statistics (BLS), Quarterly Census of Employment and Wages (QCEW), Third Quarter 2012 to Third Quarter 2017.

8. "Location Quotient" is the share of the region's employment in a particular industry relative to the national average. The base is 1. Therefore, if an industry in the PacMtn area has an LQ of 2.50, that means that the local percentage of jobs in that industry in this region is two-and-a-half times greater than the national average.

9. In the NAICS coding system, industries in the Ambulatory Health Care Services subsector provide health care services directly or indirectly to ambulatory patients and do not usually provide inpatient services. These industries include offices of physicians, dentists, mental health practitioners, dialysis centers, medical laboratories, imaging centers and home health care.