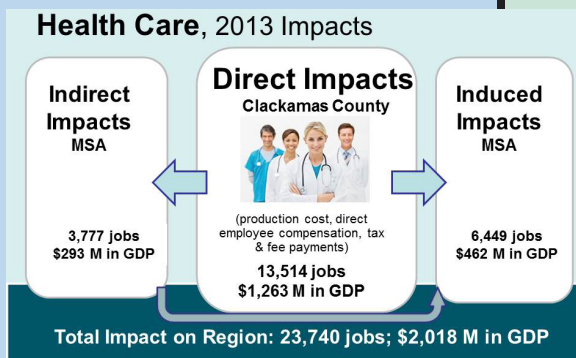


Health Care

The health care cluster is a vital element of the Clackamas County economy, and this cluster has grown measurably over the past several years. Health care jobs tend to pay above average wages, and many of Clackamas County's largest employers are in this cluster. Representative companies include: American Medical Response NW, Legacy Meridian Park Hospital, Northwest Permanente, Providence Willamette Falls, and Sunnyside Hospital. Significant levels of planned investments by private and non-profit health care providers in Clackamas County are underway.



Economic Benefits to Clackamas County and the Region

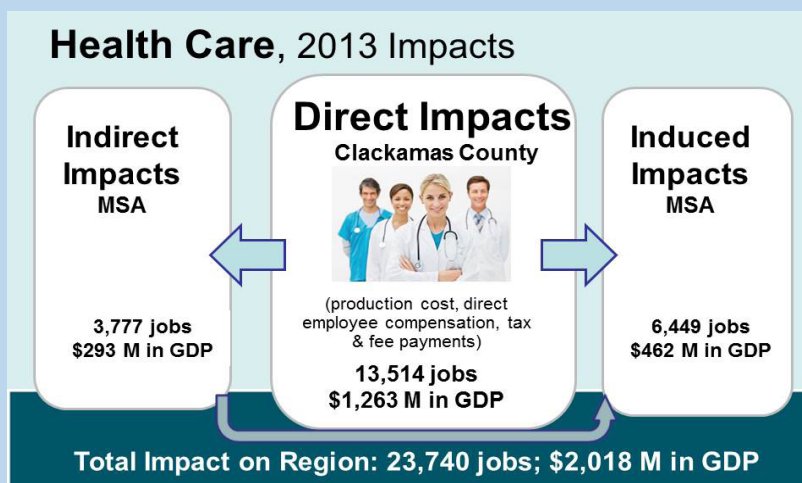
The health care cluster is a major economic engine in Clackamas County with an annual direct value added GDP that now exceeds \$1.2 billion. Today, over 780 companies within this cluster provide employment to over 13,000 workers in Clackamas County. This cluster also includes several of the county's largest employers, which support hundreds of small and medium size suppliers.

The health care cluster offers a wide range of entry level and advanced occupations with employment opportunities in rural and urban areas. Changing demographic patterns resulting from an aging "baby boom" population combined with a spike in birth rates as younger "Generation Y" households have children will result in increased demand for health care for many years. Direct economic benefit from production costs, employee compensation, and tax payments account for \$1.2 billion in value added GDP in Clackamas County, and leverages an additional \$755 million in secondary regional GDP from supply chain purchases and employee spending multipliers.

**Health Care Cluster
Current Stats for Clackamas County**

- Gross Domestic Product (GDP): \$1.3 B
- Cluster Share of County GDP: 6.9%
- Exports/Sales from Outside Region: 0%
- Direct Employment: 13,514
- County Businesses: 788
- Number of Businesses in the Top 100: 9
- 10-year Job Growth Forecast: 22%
- Cluster Location Quotient (LQ): 1.3

Source: compiled by FCS GROUP based on IMPLAN (2013), adjusted to 2015 dollars. 10-year forecast provided by the Oregon Employment Department. GDP = gross domestic product. Location Quotient (LQ) depicts relative share of this industry's contribution in Clackamas County compared to this industry's contribution in the 9-county Metropolitan Statistical Area.



Health Care Cluster: Annual Economic Benefits

	2006	2010	2013
Industry Location Quotient	1.1	1.19	1.3
Contribution to County GDP	8.0%	7.1%	6.9%
Business Establishments in County	599	713	788
Average Labor Income in County (per job)	\$65,454	\$68,822	\$71,152
Labor Income in County	\$744,800,000	\$895,240,000	\$961,550,000
Employment			
Direct Jobs in Clackamas County	11,379	13,008	13,514
Secondary Jobs	n/a	11,163	10,226
Total Direct & Secondary Employment	11,379	24,171	23,740
Direct GDP and Output in Clackamas County			
Direct GDP (Value Added)	\$1,060,900,000	\$1,160,420,000	\$1,263,320,000
% Traded Outside Region	n/a	n/a	n/a
Output	\$1,714,020,000	\$1,856,970,000	\$1,919,210,000

GDP = Gross Domestic Product.

Source: Analysis by FCS GROUP. All data in this table with the exception of business establishments, are based on 2006, 2010, 2013 IMPLAN estimates. Employment reflects total jobs (full and part time workers as well as the self-employed). Estimated business establishments are derived from the Oregon Employment Department. Location quotients are based on Clackamas County's relative propensity to attract employers within this cluster in comparison to the nine-county Portland-Vancouver Metropolitan Statistical Area (MSA). *Note: Dollar figures are adjusted to 2015 dollars.*



The future outlook for the health care cluster is very positive. Average compensation is well above the county-wide average for all jobs, and continues to trend upwards. Total GDP (valued added) and direct employment increased by 7% and 19% between 2006 and 2013. As Clackamas County and regional population increases and the amount of people over the age of 65 expands, the health care cluster should continue to experience above average growth and investment.

Health Care Cluster North American Industrial Classification System (NAICS) Categories

621 & 622: Includes businesses which include offices of all health care specialists including physicians, dentists, as well as all specialty doctors, hospitals, and specialty care facilities.

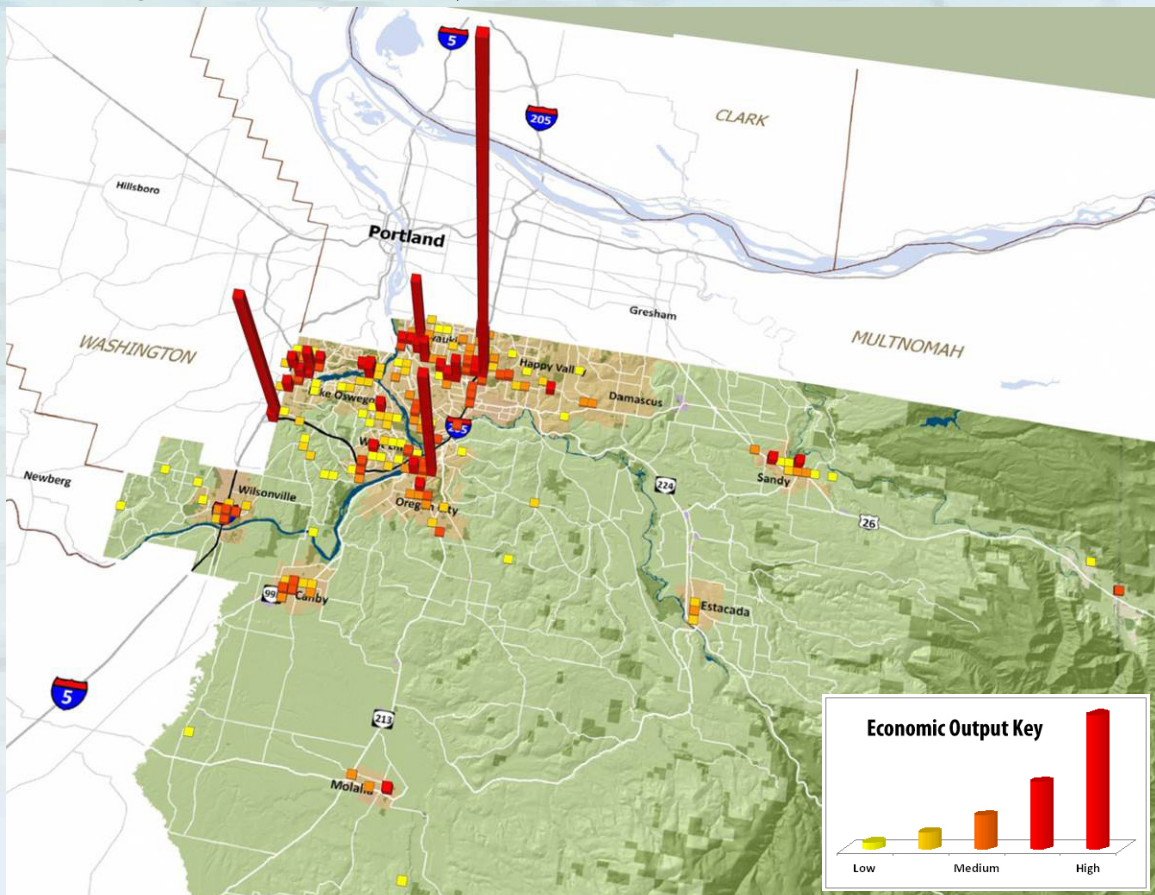
Sample of Health Care Companies in Clackamas County

American Medical Response NW *
Kaiser Foundation Health Plan Of NW *
Kaiser Foundation Hospital *
Legacy Meridian Park Hospital *
Northwest Permanente, P.C. *
Providence Milwaukee Hospital *
Providence Willamette Falls Hospital *
Rehab Specialists Inc. *
Sunnyside Hospital *

Source: Oregon Employment Department; FCS GROUP
 * Indicates top 100 County Business Listing



Existing Health Care Companies in Clackamas County: Annual Regional Economic Output by Location*



* Reflects total economic output attributed to business activities measured in 2013 using the IMPLAN model for Clackamas County.

Career Opportunities

Health Care is projected to add jobs in a wide variety of professions, ranging from patient care to technical research, to business management and administrative duties associated with running health care establishments. Representative career opportunities include:

- Registered Nurse
- Medical Secretary
- Physicians and Surgeons
- Medical Assistants
- Dental Hygienists
- Radiologic, CAT and MRI Technologists
- Medical and Health Services Managers



Resources

Clackamas County Business & Economic Development
www.clackamas.us/business

Business Oregon
www.oregon4biz.com

Clackamas Workforce Partnership
www.clackamasworkforce.org

Clackamas Community College
www.clackamas.edu

Contact Information

Clackamas County Business & Economic Development
150 Beaver Creek Road
Oregon City, Oregon 97045
503-742-4329
4biz@clackamas.us
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