

STATE OF THE SECTOR

HEALTH SCIENCES
2017



GREATER NEW ORLEANS INC

REGIONAL ECONOMIC DEVELOPMENT

Greater New Orleans has long been a strong health services provider and active hub of research and bioscience activity making this sector one of the region's largest employers. Regional organizations are working to continue fostering entrepreneurship and innovation, while creating a thriving biosciences and healthcare industry.

An infusion of investment continues to enhance the region's research base. Educational institutions, including LSU Health Sciences Center, Tulane University Medical Center, and Xavier University of Louisiana continue to drive academic research. Hospitals across the region continue to expand and develop, including Children's Hospital, the creation of the St. Bernard Parish Hospital Services District, and the Ochsner Health System including the addition of innovationOchsner - a pioneer in digital health.

New assets have also come online since Hurricane Katrina. These include the Louisiana Cancer Research Center, the New Orleans BioInnovation Center, University Medical Center, and the South East Louisiana Veterans Health Care System Hospital. Together, these new and expanding institutions will be responsible for significant investment and job growth in the region.

With nearly 30,000 projected job openings by 2026 in Greater New Orleans, this sector is well-positioned to provide high-growth, high-demand jobs in our region if we can appropriately train our workforce for these jobs.

Almost half of all job openings over the next decade will be in middle-skill positions - those that do not require a bachelor's or advanced degree. These occupations offer



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viable opportunities for career advancement. We must be deliberate in highlighting these positions as key to supporting the vitality of the health sciences industry.

This report is the fourth in a series of State of the Sector workforce reports illuminating the scope and context of labor demand from our region's key industries. I would like to give a special thank you to Blue Cross and Blue Shield of Louisiana for providing the support that made it possible to do this work.

A handwritten signature in black ink, appearing to read "Michael Hecht".

Michael Hecht
President and CEO



EXECUTIVE SUMMARY

- WELL-PAYING HIGH-SKILL JOBS** → The average median annual salary for a high-skill worker in the industry is \$77,085.
- 52% MIDDLE-SKILL JOBS** → 52% of all health sciences jobs require middle skills, 5% higher than the regional average.
- HIGH-GROWTH OPPORTUNITIES** → As one of the largest industries in the region, the health sciences industry is projected to grow by 17% over the next decade.
- PATH FORWARD** → Destination Health Care remains a singular opportunity to help propel further growth in the industry.

Source: EMSI

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We define health sciences as the delivery of any medical or remedial care, including the research and development necessary to support the timely and efficient delivery of these services.

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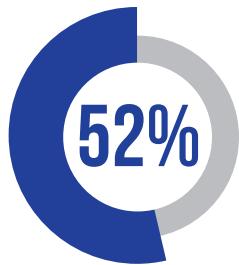
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HEALTH SCIENCES AT A GLANCE

EMPLOYS 77,805 IN THE GREATER NEW ORLEANS REGION



OF HEALTH SCIENCES
JOBS REQUIRE
MIDDLE SKILLS

13,274 PROJECTED NEW JOBS OVER THE NEXT DECADE

\$15.75/HR
AVERAGE MEDIAN
MIDDLE-SKILL
JOB EARNINGS

\$31.21/HR
AVERAGE MEDIAN
HIGH-SKILL JOB
EARNINGS FOR BACHELOR
DEGREE HOLDERS

\$52.60/HR
AVERAGE MEDIAN
HIGH-SKILL JOB
EARNINGS FOR GRADUATE
DEGREE HOLDERS

29,834 HEALTH SCIENCES JOB OPENINGS OVER THE NEXT DECADE

Source: EMSI

SKILLS & JOBS

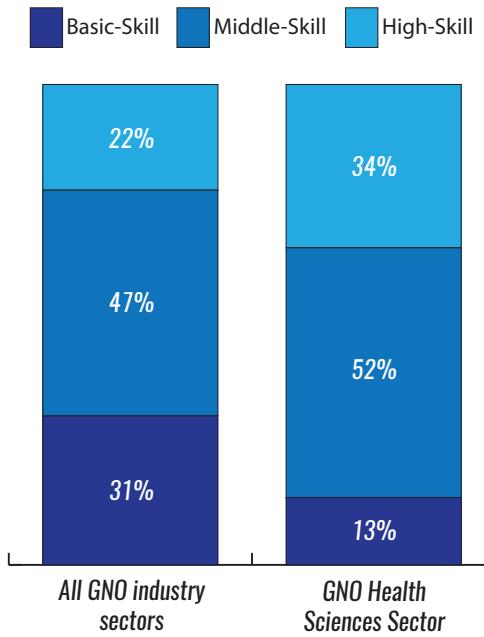


DISTRIBUTION OF SKILLS

The Health Sciences sector requires more workers that are classified as middle- and high-skilled than the GNO economy as a whole. The skill level in the industry highlights the importance of a highly trained workforce in order to meet future job growth demand in the industry.

What are middle- and high-skill jobs?

We define middle skill jobs as those that generally require some education or training above a high school diploma but less than a bachelor's degree. These postsecondary education and training requirements can include associate's degrees, industry recognized credentials, on-the-job training, previous work experiences, or generally "some college" but less than a bachelor's degree. High-skill jobs require a bachelor's degree or higher. Basic-skill jobs require no formal educational requirements. Although the educational barrier to entry associated with basic-skill occupations is low, this is not to say that these occupations do not require skills and certifications to enter the workforce.



Source: EMSI

SKILLS & JOBS

TOP MIDDLE-SKILL JOBS

Middle-Skill Occupation	% of Total Jobs in Industry Group (2016)	Employed in Industry Group (2016)	Job Openings to 2026	Median Hourly Earnings	Typical Entry Level Education
Nursing Assistants	6.8%	5,296	1,860	\$10.87	Postsecondary nondegree award
Licensed Practical and Licensed Vocational Nurses	5.8%	4,499	1,556	\$19.52	Postsecondary nondegree award
Receptionists and Information Clerks	3.3%	2,534	1,149	\$11.65	High school diploma or equivalent
Medical Assistants	2.4%	1,876	927	\$13.57	Postsecondary nondegree award
Office Clerks, General	2.1%	1,641	571	\$11.38	High school diploma or equivalent
Dental Assistants	1.9%	1,449	481	\$14.02	Postsecondary nondegree award
Medical Secretaries	1.2%	902	430	\$14.57	High school diploma or equivalent
First-Line Supervisors of Office and Administrative Support Workers	1.5%	1,189	384	\$21.85	High school diploma or equivalent
Pharmacy Technicians	1.9%	1,449	355	\$14.33	High school diploma or equivalent
Billing and Posting Clerks	0.9%	732	327	\$15.61	High school diploma or equivalent

Source: EMSI

14,667

PROJECTED MIDDLE-SKILL HEALTH SCIENCES JOB OPENINGS BY 2026

Allied Health Careers make up a significant portion of the middle-skill workforce and serve as a vital health care component. According to the Association of Schools of Allied Health Professionals, allied health is defined as the delivery of health or related services pertaining to the identification, evaluation and prevention of diseases and disorders; dietary and nutrition services; rehabilitation and health systems management, among others. These professionals are distinct from physicians and nursing. Together, these wide-ranging occupations offer viable career opportunities for many middle-skill workers in the industry.



TOP HIGH-SKILL JOBS

High-Skill Occupation	% of Total Jobs in Industry Group (2016)	Employed in Industry Group (2016)	Job Openings to 2026	Median Hourly Earnings	Typical Entry Level Education
Registered Nurses	18.3%	14,242	5,619	\$31.32	Bachelor's degree
Physicians and Surgeons, All Other	1.6%	1,237	577	\$89.36	Doctoral or professional degree
Pharmacists	1.4%	1,068	358	\$55.01	Doctoral or professional degree
Physical Therapists	0.8%	657	350	\$37.22	Doctoral or professional degree
Medical and Clinical Laboratory Technologists	1.1%	846	336	\$25.11	Bachelor's degree
Medical and Health Services Managers	0.9%	680	323	\$40.67	Bachelor's degree
Nurse Practitioners	0.6%	471	281	\$46.42	Master's degree
General and Operations Managers	0.7%	521	219	\$42.51	Bachelor's degree
Mental Health Counselors	0.5%	418	196	\$16.64	Master's degree
Healthcare Social Workers	0.5%	420	174	\$23.42	Master's degree

Source: EMSI



11,170
PROJECTED HIGH-SKILL HEALTH SCIENCES
JOB OPENINGS BY 2026

GROWTH IN THE HEALTH SCIENCES INDUSTRY

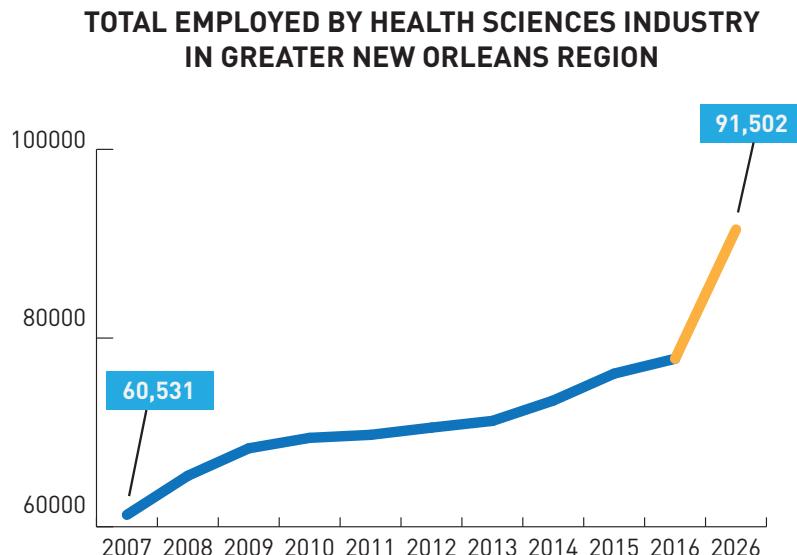
From 2007-2016, the health sciences industry in the Greater New Orleans region has grown by 27% in terms of total employment, outpacing the national growth rate by nearly 10%. In fact, the health sciences industry has surpassed the total employment numbers from pre-Katrina, indicating not only a post-Katrina rebound in the industry, but also new job growth.

While the growth in the region follows national growth trends, locally one of the driving factors is the development of the new medical corridor. At the center of the new corridor is the recently opened University Medical Center (UMC), managed under a public-private partnership between the State of Louisiana and LCMC. Opened in 2015, the \$1.2 billion state-of-the-art University Medical Center now employs 2,200 people.

In addition to the recent opening of the University Medical Center, the expansion of Ochsner Health System throughout the region has also contributed to overall growth in the industry. In the past five years, Ochsner Health System has added over 4,400 jobs. Over the next decade, Ochsner's \$600 million planned expansion in Jefferson Parish will result in 3,200 new jobs.

Other planned expansions and newly opened facilities will be instrumental in contributing to new job growth exceeding 17% by 2026. When fully operational, the Southeast Louisiana Veterans Health Care System Veterans Medical Center will employ 2,800 people. Furthermore, Children's Hospital's \$225 million planned expansion will have significant impacts in driving further growth in the industry.

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Source: GNO, Inc. Research

KEY HEALTH SCIENCES ASSETS IN THE GNO REGION

Together, the health sciences industry is comprised of over 3,500 payrolled business locations throughout the Greater New Orleans region benefitting from a wide-range of nationally recognized health science assets. Institutions in the region include academic institutions, research hospitals, acute care facilities, and start-up incubators.

Southeast Louisiana Veterans Health Care System Veterans Medical Center



Xavier University Center for Minority Health and Health Disparities Research & Education



LSU Health Sciences Center New Orleans



Ochsner Health System



Touro



New Orleans BioInnovation Center



innovationOchsner



Tulane Primate Research Center



Louisiana Cancer Research Center



Children's Hospital (LCMC owned)



ACADEMIC TRAINING INSTITUTIONS IN THE GNO REGION

Home to multiple colleges and universities with strong health sciences degrees and research programs in areas such as cancer research, gene therapy, neurosciences, tropical medicine, and nursing, Greater New Orleans is a favorable research and training environment for health science professionals. Concentrations of study include non-degree credentialing opportunities, 2-year associate's degrees, 4-year bachelor's degrees, and specialized advanced degree programs in medicine, nursing, biomedical research, and pharmacy.

Due to the nature of the industry, many of the positions in the health sciences industry require high levels of specialized academic training that are unique to the position. Many partnerships between key assets and regional academic training institutions help to fill the need for worker demand in the industry. In fact, from 2011-2015, the completion rates at regional academic training institutions associated with the top 10 medical-specific occupations have increased by 4%. Over the next decade, the regional academic training institutions in Greater New Orleans should play a vital role in helping to meet workforce needs in the industry.

In addition to the academic training institutions in the GNO Region, health systems in the region also employ workforce development initiatives to help train the workforce. One such program is Ochsner's partnership with the Louisiana Workforce Commission to provide free medical assistant training to eligible applicants.



CAREER LADDER: NURSING



Source: EMSI

CAREER PATHWAY

While nurses and doctors may be the most public-facing roles in the health sciences industry, there are thousands of other job opportunities in positions that are crucial in providing support for the industry. Many of these positions are interconnected and can serve as a starting point into a wide range of high-demand, high-growth career paths throughout the industry.



RECEPTIONIST & INFORMATION CLERK

Work Activities: Answer inquiries and provide information to the general public, customers, visitors, and other interested parties regarding activities conducted at establishment and location of departments, offices, and employees within the organization.

Workforce: 2,534 currently employed, 1,149 job openings in 2026

Hourly Pay: 25th Percentile \$10.02/hr; Median \$11.64/hr; 75th Percentile \$14.08/hr

Requirements: High School Diploma + short-term on-the-job experience

MEDICAL SECRETARY

MEDICAL SECRETARY

Work Activities: Perform secretarial duties using specific knowledge of medical terminology and hospital, clinic, or laboratory procedures. Duties may include scheduling appointments, billing patients, and compiling and recording medical charts, reports, and correspondence.

Workforce: 902 currently employed, 430 job openings in 2026

Hourly Pay: 25th Percentile \$12.46/hr, Median \$14.57/hr, 75th Percentile \$16.96/hr

Requirements: High School Diploma + moderate on-the-job experience

Certifications: National Certified Medical Assistant

MEDICAL RECORDS & HEALTH INFORMATION TECHNICIAN (MEDICAL CODER)

Work Activities: Compile, process, and maintain medical records of hospital and clinic patients in a manner consistent with medical, administrative, ethical, legal, and regulatory requirements of the health care system. Process, maintain, compile, and report patient information for health requirements and standards in a manner consistent with the healthcare industry's numerical coding system.

Workforce: 625 currently employed, 254 job openings in 2026

Hourly Pay: 25th Percentile \$12.02/hr, Median \$15.03/hr, 75th Percentile \$18.33/hr

Requirements: Post-Secondary nondegree Award

Certifications: Certified Professional Coder, Certified Outpatient Coder, Certified Coding Associate

BILLING AND POSTING CLERKS

BILLING AND POSTING CLERKS

Work Activities: Compile, compute, and record billing, accounting, statistical, and other numerical data for billing purposes. Prepare billing invoices for services rendered or for delivery or shipment of goods.

Workforce: 732 currently employed, 327 job openings in 2026

Hourly Pay: 25th Percentile \$13.25/hr, Median Earnings \$15.61/hr, 75th Percentile \$18.34/hr

Requirements: High School Diploma + moderate on-the-job experience

Certifications: Certified Professional Biller

PATH FORWARD

STREAMLINED INDUSTRY-RECOGNIZED CREDENTIALS The health sciences industry is one of the most identifiable industries for many students. Despite the industry's popularity, there is a need to ensure that the credentialing process in Louisiana aligns with industry demand. As a result, YouthForce NOLA has teamed up with CTE leaders in the region in an effort to ensure that industry validated credentials are in line with Louisiana Department of Education's Jump Start pathways and are in place to help ensure that students are able to obtain the relevant credentials needed to excel in the industry.

The process is centralized around three high-demand occupations in the industry. These occupations include Medical Assistants, Pharmacy Technicians, and Emergency Medical Technicians. Greater New Orleans, Inc. is committed to supporting the efforts of YouthForce NOLA in order to ensure that health science employers are able to find a strong, well-trained workforce to meet future demand across the region.

DESTINATION HEALTHCARE The health sciences sector becomes a powerful economic engine when it drives destination healthcare. Destination healthcare occurs when outside individuals travel into the region for critical, often life-saving, medical treatment. Destination healthcare is a key characteristic of medical hubs like the Texas Medical Center (cancer), Cleveland Clinic (heart) and the Mayo Clinic (neurology). The region is well positioned to excel in specialties including Neurosciences/Center for Successful Aging, Diabetes/Endocrinology, Infectious Disease, Transplants, Cancer, and Digital Health.

Moving forward, Greater New Orleans, Inc. will remain engaged with our partners to identify our existing health care assets and partner with our health systems to develop these specialized areas into world-class providers. With recent developments throughout the region, Greater New Orleans is uniquely positioned to develop a thriving health sciences sector, which can attract patients, doctors, and researchers from around the world.

TECH TRANSFER & COMMERCIALIZATION New innovation and technologies are being developed throughout our university systems, hospitals and beyond. Our region's major universities all have technology transfer and commercialization offices to help guide these companies through the complex process of bringing technology to market. In addition to our region's universities, innovationOchsner - an innovation accelerator - is utilizing technology and data to create patient-centered solutions to transform healthcare outcomes. Greater New Orleans, Inc. is committed to providing the support and resources these entrepreneurs and scientists need to develop a pathway to success.

Another key asset in providing company assistance is the New Orleans BioInnovation Center (NOBIC). NOBIC is a nonprofit business incubator focused on developing innovation and entrepreneurship within the life and bio science sector. Focus areas include new medical devices, therapeutics, diagnostics, digital health platforms, clean technologies, and more. The goal of NOBIC is to commercialize technologies within the region working with independent innovators and researchers from major institutions and health systems including Tulane, LSU Health, Xavier and UNO, and Ochsner. NOBIC also runs the New Orleans BioFund, which offers various capital options to startups to help bridge critical funding gaps.

COMPLEMENTARY INDUSTRIES As the health sciences industry continues to grow over the next decade, so, too, will the demand for a skilled workforce in many complementary industries. These industries include digital health, medical tourism, and advanced manufacturing for bio-medical and bio-industrial products. Greater New Orleans, Inc. is committed to engage with and directly support our partners including the New Orleans Business Alliance (NOLABA) in supporting growth in these complementary industries.

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Louisiana

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