

Economic Contributions of **FLORIDA HOSPITALS** *in 2021*



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Photo credit: Nicklaus Children's Hospital.



EXECUTIVE SUMMARY

This report was prepared to update previous studies of economic contributions of Florida hospitals in 2021 and additionally the economic contributions of other hospital-owned healthcare businesses in the state, such as offices of physicians, dentists and other health practitioners, outpatient care and other ambulatory surgical and emergency centers, medical and diagnostic laboratories, home health care services, nursing and community care facilities, mental health and substance abuse residential treatment centers, and retail pharmacies. The analysis was conducted using financial data for hospitals in fiscal year 2021 from the Florida Agency for Healthcare Administration, and information on affiliated businesses from D&B Hoovers database. Economic contributions were estimated with an economic model of the State of Florida (IMPLAN) that captures multiplier effects on the overall economy, including indirect effects of industry supply chain activity and induced effects of employee household income spent in the region.

In 2021, 321 private and public hospitals operating in Florida had 70,444 hospital beds, 315,497 fulltime equivalent (FTE) employees, and \$81.54 billion in total operating and non-operating revenues, \$66.73 billion in total operating expenses, \$28.28 billion in employee wages, salaries, and benefits paid. Hospital-affiliated healthcare businesses had estimated employment of 38,396 persons and revenues of \$35.54 billion, including employment by offices of physicians-except mental health (15,848 jobs), home health care services (4,756), continuing care retirement communities (3,199), other outpatient care centers (3,182), offices of physicians-mental health (2,991), outpatient mental health and substance abuse centers (1,656), and medical laboratories (1,643).

The total combined economic contributions of Florida hospitals and affiliated businesses in 2021, including multiplier effects in other supporting sectors of the economy, were 1.24 million fulltime and part-time jobs, \$267.99 billion in industry output or sales revenues, \$121.34 billion in total value added, \$81.65 billion in labor income (earnings to employees and business owners), and \$23.44 billion in taxes paid to local, state, and federal governments (Table ES-1). Direct employment of 360,046 jobs represented 29.0 percent of total employment contributions, while indirect

and induced multiplier effects represented 881,343 jobs or 71.0 percent of total employment contributions. Value added contributions represented 9.7 percent of Florida's Gross State Product in 2021 and the employment contributions represented 9.9 percent of the state workforce.

Across regions of the state, employment contributions of hospitals and affiliated healthcare businesses were highest in the Orlando area (358,396 jobs), followed by Miami-Ft. Lauderdale (315,739), Tampa-St. Petersburg (238,336), Jacksonville (105,269), Sarasota-Bradenton (103,423), Gainesville (39,746), Pensacola (34,650), Tallahassee (29,843), and Panama City (15,985). The largest individual Florida counties in terms of employment contributions were Miami-Dade (145,826 jobs), Orange (141,497), Hillsborough (126,783), Pinellas (80,196), Broward (75,080), Duval (73,256), Brevard (65,851), Palm Beach (55,959), Lee (43,090), Volusia (37,474), Alachua (32,990), and Pasco (22,149).

Florida hospitals are large and stable employers across the state, and their contributions continue to grow. Value added contributions of Florida hospitals in 2021 were 7.9 percent higher than in 2019 and 5.9 percent higher than 2015 in inflation-adjusted terms.

Table ES1. Summary of combined economic contributions of Florida hospitals and affiliated healthcare businesses, 2021.

Metric/Effect	Hospitals	Hospital Affiliated	Total
Employment (Jobs)	878,913	362,476	1,241,389
Direct	322,229	37,817	360,046
Indirect	305,939	233,809	539,749
Induced	250,745	90,849	341,594
Output (M\$)	177,756	90,233	267,988
Value added (M\$)	88,568	32,771	121,339
Labor income (M\$)	59,926	21,719	81,645
State/local and federal taxes (M\$)	18,415	5,027	23,442

Values in million 2021 dollars or fulltime and part-time jobs.
Source: IMPLAN model and 2021 data for Florida.

Photo credit: Lee Memorial Hospital.



INTRODUCTION

The health care industry is a major driver of economic activity in the United States, and is a source of economic development and job growth. Health care services are essential in the State of Florida because of the large, rapidly growing population, especially persons over age 65, and contribute to improving overall health and well-being of communities.

Broadly defined, health care and allied manufacturing and support services industries in Florida in 2021 had total employment of 1.33 million fulltime and part-time jobs, \$181.13 billion in output or business revenues, \$111.91 billion in value added, \$89.39 billion in employee compensation, and \$5.85 billion in proprietor income or small business owner earnings according to IMPLAN 2021 data for Florida (Table 1). The direct contribution of health care and allied industries represented 10.6 percent of total employment in the Florida workforce, and value added represented 8.9 percent of Gross State Product (equivalent to Gross Domestic Product at the national level). The largest individual sectors of the healthcare industry for employment were hospitals (305,785 jobs) and offices of physicians (320,774), followed by nursing and community care facilities (159,545), retail health and personal care stores (101,019), home health care services (90,958), offices of dentists (78,953), offices of other health practitioners (78,690), and outpatient care centers

(71,583). Medical and dental laboratories and health-related manufacturing sectors had employment of 68,099 jobs.

The health care industry in Florida has generally grown faster than most other sectors of the economy, and has grown steadily from 1998 to 2021, except for a small decline during 2009-13 in the aftermath of the recession (Figure 1). The overall increase in primary health care sector employment was 76.9 percent during this period, representing an average annual growth rate of 3.3 percent. Annual growth in employment was above average for ambulatory health care services (5.0%), but lower for hospitals (1.7%) and nursing-residential care facilities (2.0%). GDP growth of the primary healthcare sector averaged 4.8 percent annually, again with higher growth for ambulatory health care services (6.3%), but lower for hospitals (3.6%) and nursing-residential care facilities (1.4%) in inflation-adjusted terms.

This report was commissioned to estimate the total annual economic contributions of hospitals in the State of Florida in 2021, to update previous studies for 2007, 2009, 2011, 2013, 2015 and 2019 (Hodges et al.), and to capture the economic contributions of hospital affiliated healthcare businesses, including the economic activity generated through multiplier effects in other sectors of the economy.

Photo credit: Hendry Regional Medical Center Foundation.

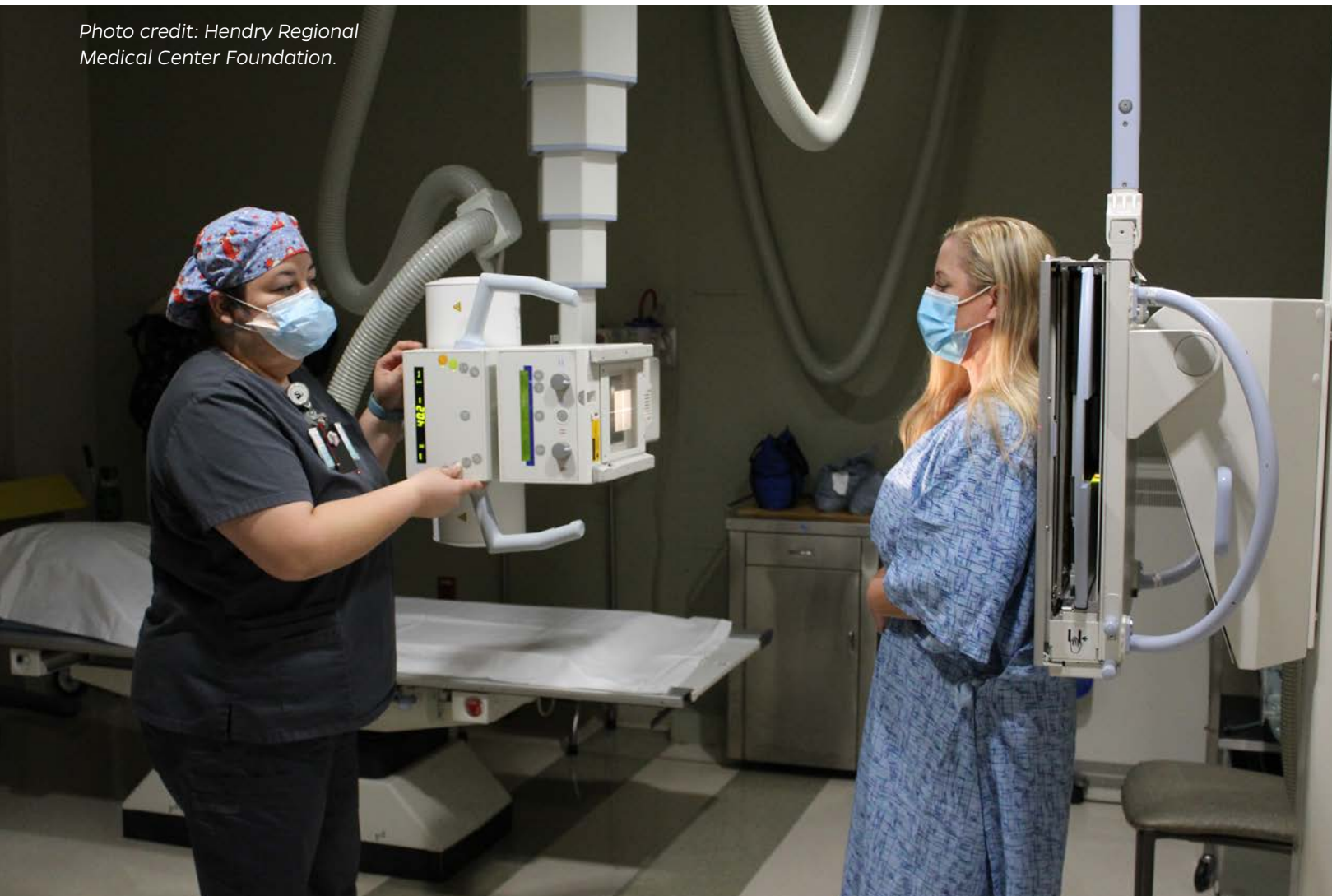


Table 1. Profile of healthcare and allied industries in Florida, 2021.

Industry Sector	Employment (Jobs)	Output (M\$)	Value Added (M\$)	Employee Compensation (M\$)	Proprietor Income (M\$)	Other Property Income (M\$)	Tax on Production and Imports (M\$)
Offices of physicians	320,774	43,466	28,695	26,749	2,861	-43	-872
Hospitals	305,785	58,022	31,197	26,037	259	4,535	366
Nursing and community care facilities	159,545	12,295	7,974	6,755	138	1,059	22
Retail - Health and personal care stores	101,019	9,249	6,111	4,672	245	652	543
Home health care services	90,958	6,196	4,578	4,271	434	-11	-115
Offices of dentists	78,953	8,306	6,268	4,693	504	1,217	-146
Offices of other health practitioners	78,690	9,095	7,759	3,989	417	3,560	-207
Outpatient care centers	71,583	7,214	4,222	4,067	455	-117	-183
Medical and diagnostic laboratories	33,936	5,618	4,618	2,272	245	2,242	-142
Residential mental health, substance abuse and other facilities	33,315	2,295	1,474	1,441	29	1	3
Other ambulatory health care services	22,295	2,729	1,907	1,380	149	423	-45
Surgical and medical instrument manufacturing	10,177	3,211	1,533	917	22	622	-28
Pharmaceutical preparation manufacturing	7,271	7,814	2,863	671	53	1,965	175
Surgical appliance and supplies manufacturing	5,869	2,042	838	445	11	398	-16
Ophthalmic goods manufacturing	4,136	1,549	939	463	8	474	-6
Dental laboratories	3,610	520	304	269	6	31	-2
Medicinal and botanical manufacturing	1,421	718	245	119	6	114	6
Dental equipment and supplies manufacturing	804	258	126	75	2	52	-2
In-vitro diagnostic substance manufacturing	605	303	113	60	6	45	2
Biological product (except diagnostic) manufacturing	270	234	144	45	3	95	2
Total	1,331,016	181,134	111,907	89,386	5,853	17,316	-648
Health care share of all industries	10.6%	8.1%	8.9%	13.1%	7.6%	4.1%	-0.9%

Values in million 2021 dollars or fulltime and part-time jobs.

Source: IMPLAN model and 2021 data for Florida.

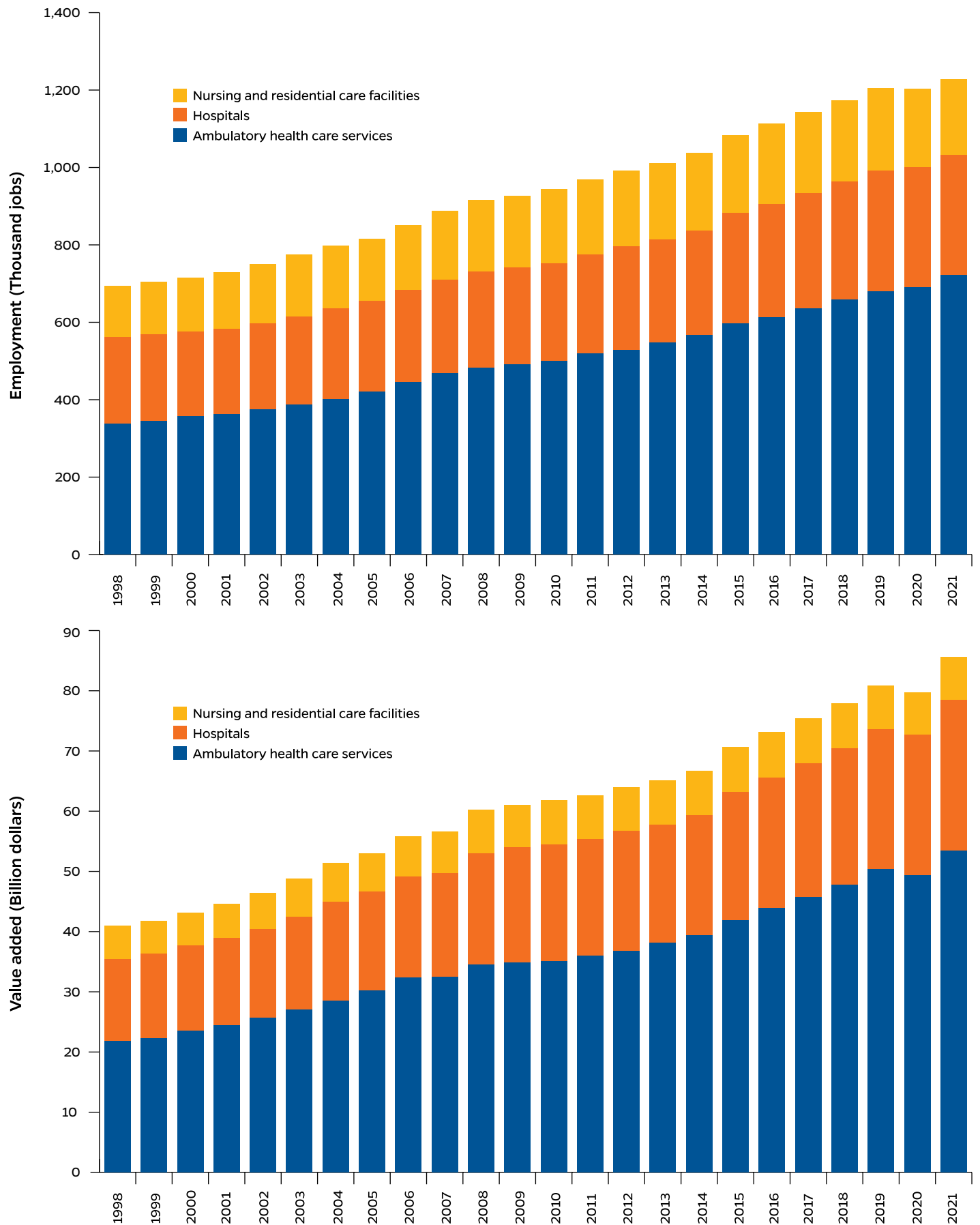


Figure 1. Trend in Florida primary healthcare industry employment and value added, 1998-2021.

Values are in constant 2012 dollars.

Source: U.S. Commerce Department, Bureau of Economic Analysis.

Photo credit: Lake Butler Hospital.



METHODS

Hospital Operations Data

Information on number of hospital beds, employment, expenditures, and revenues for 301 licensed Florida hospitals and their subsidiary locations operating in 2021 was obtained from the Florida Agency for Healthcare Administration, Florida Hospital Uniform Reporting System (AHCA/FHURS) compiled with additional data by the Florida Hospital Association. Information reported included a total of 66,358 beds, 297,197 fulltime equivalent (FTE) employees, operating expenses of \$62.86 billion, and total operating and non-operating revenues of \$76.81 billion, as summarized in Table 2. Note that this financial information does not account for 20 licensed hospitals not reporting data for 2021, including 15 state-affiliated hospitals that are not required to report to FHURS. Missing financial data for these facilities were imputed based on state averages per hospital bed. In addition, financial information for 53 hospitals that was reported by parent companies as aggregated amounts for multiple facilities was imputed based on company-averages per hospital bed, to account for activity at all individual hospital locations, with parent company values adjusted down to maintain the same overall totals. Information including imputed missing financial data for 2021 is shown in the third column of Table 2. For all 321 hospital locations, there were an estimated 70,444 hospital beds, 315,497 fulltime equivalent employees (FTE), total operating expenses of \$66.73 billion, and total revenues of \$81.54 billion. Net patient care revenues of \$70.10 billion consisted of health insurance and other charge-based payments, Medicare, Medicaid, other government payments, charity and self-pay, restricted funds for indigent care, and deductions for administrative, courtesy, policy and employee discounts, net of payer deductions. The number of employees (FTE)

reported in FHURS was further adjusted to reflect an employee headcount of 322,229 jobs based on IMPLAN 2021 data for Florida for the mix of fulltime and part-time employees.

Table 2. Summary of Florida hospital information for 2021.

Item	Original Data Reported	Adjusted and Imputed Data
Number of hospitals	301	321
Licensed beds	66,358	70,444
Patient days (Million)	14.70	15.60
Admissions (Million)	2.62	2.78
Employees (FTE)	297,197	315,497
Total operating and nonoperating revenue (M\$)	76,814	81,544
Net patient care revenue (M\$)	66,042	70,109
Other operating revenue (M\$)	4,079	4,330
Non-operating revenue (M\$)	6,693	7,105
Operating expenses (M\$)	62,862	66,733
Employee salaries (M\$)	22,535	23,923
Employee benefits (M\$)	4,104	4,356

Monetary values in million 2021 dollars.

Source: Florida AHCA/FHURS and authors' calculations.

Maps of the number of hospital locations and hospital beds in Florida counties are shown in Figures 2 and 3, respectively.

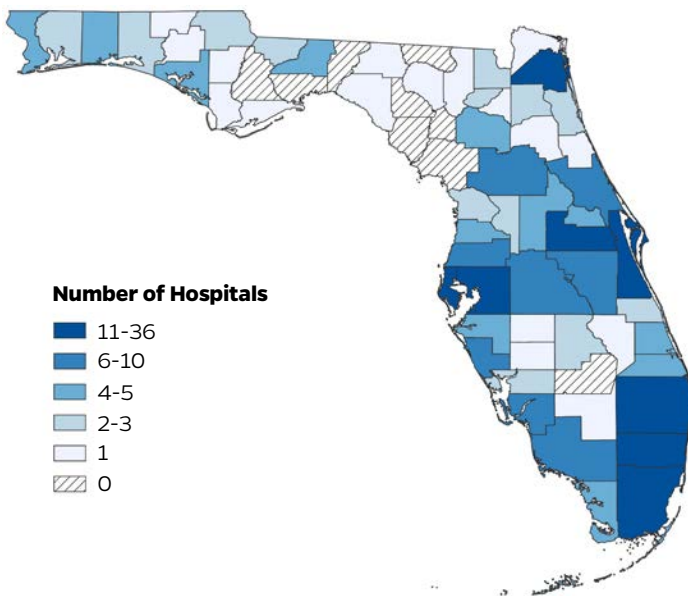


Figure 2. Map of number of hospital locations in Florida counties, 2021.

Source: Florida AHCA/FHURS and ArcGIS software.

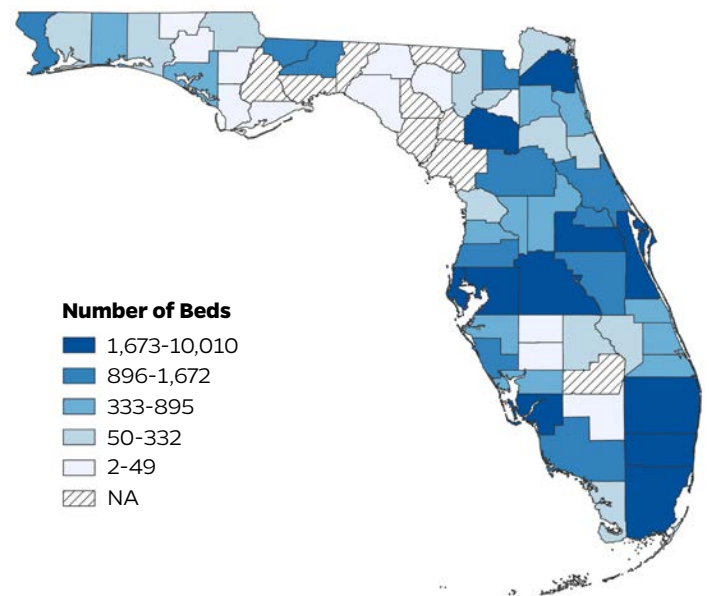


Figure 3. Map of number of hospital beds in Florida counties, 2021.

Source: Florida AHCA/FHURS and ArcGIS software.

Hospital Affiliated Healthcare Business Data

Data on hospital affiliated healthcare businesses in Florida were compiled from the D&B Hoovers database licensed through the University of Florida Libraries. D&B Hoovers information is gathered through market research on company annual reports, Securities and Exchange Commission (SEC) filings, trade publications, and industry informants. The data were published in mid-2022 and are presumed to represent current activity in fiscal year 2021-22. The database was queried on North American Industry Classification System (NAICS) industries corresponding to the sectors indicated above, and parent company names of all Florida hospitals and corporate hospital systems. Data were filtered for seven hospital parent companies that

report information for auxiliaries to FHURS to avoid double-counting of activity analyzed separately for the hospital sector alone in the previous study.

The information compiled from the D&B Hoovers database is summarized in Table 3. Valid data were available for 749 separate firms, with total reported employment of 38,371 and annual revenues of \$9.17 billion. Reported information was assumed to represent the most recent available from public or private sources, including public financial disclosures, market research studies, media reports, or individual industry experts. Nearly all firms listed (748) had reported employment, while only 184 firms (25%) had reported annual revenues.

Photo credit: Nicklaus Children's Hospital.



Table 3. Summary of hospital affiliated businesses in Florida from D&B Hoovers database by NAICS industry, 2021.

NAICS Code	Sector Description	Number Firms	Total Employees (Jobs)	Average Number Employees (Jobs)	Total Revenues (M\$)	Firms with Reported Revenues	Average Revenues (M\$)
446110	Pharmacies and drug stores	11	150	14	400.96	3	133.65
621111	Offices of physicians (except mental health specialists)	250	15,848	63	4,809.73	86	55.93
621112	Offices of physicians, mental health specialists	53	2,991	56	2,848.80	11	258.98
621210	Offices of dentists	1	6	6	0.00		0.00
621330	Offices of mental health practitioners (except physicians)	1	86	86	0.00		0.00
621340	Offices of physical, occupational and speech therapists, and audiologists	74	632	9	48.17	2	24.08
621399	Offices of all other miscellaneous health practitioners	3	3	1	0.14	1	0.14
621410	Family planning centers	24	582	25	1.35	2	0.68
621420	Outpatient mental health and substance abuse centers	12	1,656	138	171.68	4	42.92
621491	HMO medical centers	2	127	64	17.78	1	17.78
621493	Ambulatory surgical and emergency centers	27	529	20	98.32	13	7.56
621498	All other outpatient care centers	145	3,182	22	132.49	13	10.19
621511	Medical laboratories	13	1,643	126	162.06	6	27.01
621512	Diagnostic imaging centers	2	45	23	0.00		0.00
621610	Home health care services	59	4,756	81	297.83	13	22.91
621991	Blood and organ banks	8	296	37	0.99	1	0.99
621999	All other miscellaneous ambulatory health care services	21	1,344	64	46.53	19	2.45
623110	Nursing care facilities (skilled nursing facilities)	22	1,164	53	18.51	2	9.25
623311	Continuing care retirement communities	17	3,199	188	88.10	5	17.62
623312	Assisted living facilities for the elderly	1	88	88	4.90	1	4.90
623990	Other residential care facilities	3	44	15	20.96	1	20.96
Total		749	38,371	51	9,169.30	184	49.83

Revenues in million 2021 dollars.

Source: D&B Hoovers and authors' calculations.

Expanded estimates of employment and revenues for hospital affiliated businesses were developed to account for missing information, by multiplying the average number of employees or revenues per firm by the total number of firms listed within each sector. Total expanded employment was 38,396 jobs, and total expanded revenues were \$35.54 billion (B), as shown in Table 4. The largest sectors for hospital affiliated businesses in terms of expanded employment

were offices of physicians (18,839 jobs), outpatient care centers (6,101 jobs), home health care services (4,756 jobs), and nursing and community care facilities (4,451 jobs). The largest sectors for expanded revenues were offices of physicians (\$27.71 B), outpatient care centers (\$2.25 B), offices of other health practitioners (\$1.78 B), retail health and personal care stores (\$1.47 B), and home health care services (\$1.35 B).

Table 4. Summary of expanded employment and revenues for hospital affiliated businesses in Florida by industry sector, 2021.

Industry Sector	Number Companies	Expanded Employment (Jobs)	Expanded Revenues (M\$)	Percent of Industry Employment
Offices of physicians	303	18,839	27,708	6.0%
Outpatient care centers	210	6,101	2,249	8.4%
Home health care services	59	4,756	1,352	5.0%
Nursing and community care facilities	40	4,451	508	2.5%
Medical and diagnostic laboratories	15	1,688	351	5.5%
Other ambulatory health care services	29	1,640	59	8.0%
Offices of other health practitioners	78	721	1,783	1.1%
Retail health and personal care stores	11	150	1,470	0.2%
Residential mental health, substance abuse and other facilities	3	44	63	0.1%
Offices of dentists	1	6	0	0.0%
Total	749	38,396	35,542	3.9%

Revenues in million 2021 dollars.

Source: D&B Hoovers and authors' calculations.

Regional Economic Analysis

The broad economic contributions of hospitals and affiliated healthcare businesses in the State of Florida were evaluated with a regional economic model using the IMPLAN model and associated 2021 data for Florida (IMPLAN Group, LLC). Input-output models enable the estimation of the multiplier effects of industry activities in the local economy arising through industry supply chain purchases, known as indirect multiplier effects, and spending by employee households or induced multiplier effects (Miller and Blair, 2009). The economic model was constructed using default parameters and gravity model trade flows, with household social accounts internalized, as is standard practice for studies with IMPLAN. Activity was specified as an economic contribution analysis, which assumes ongoing industry activity rather than new final demand (Watson et al., 2007), with revenue and employment adjusted downward to net-out feedback effects that occur within each sector according to the method described by Cheney (2016). Revenues in the retail pharmacy sector were margined to net out nonlocal manufacturing, transportation, and wholesale distribution.

Spending by hospitals that occurs within the state was accounted for by regional purchase coefficients in IMPLAN that represent the average share of goods and services provided from in-state sources. Economic contribution results were expressed in 2021 dollars using IMPLAN output and GDP Implicit price deflators. A glossary of economic analysis terminology is provided in Appendix A.

Financial data and economic contribution estimates were summarized by hospital type, by major industry groups defined according to the North American Industry Classification System (NAICS), and by geographic areas in economic regions, counties, congressional districts and administrative regions. Functional economic regions of Florida shown in Figure 4 represent metropolitan areas and surrounding non-metropolitan counties that are economically linked, based on employee commuting patterns and media viewership (Johnson and Kort, 2004).

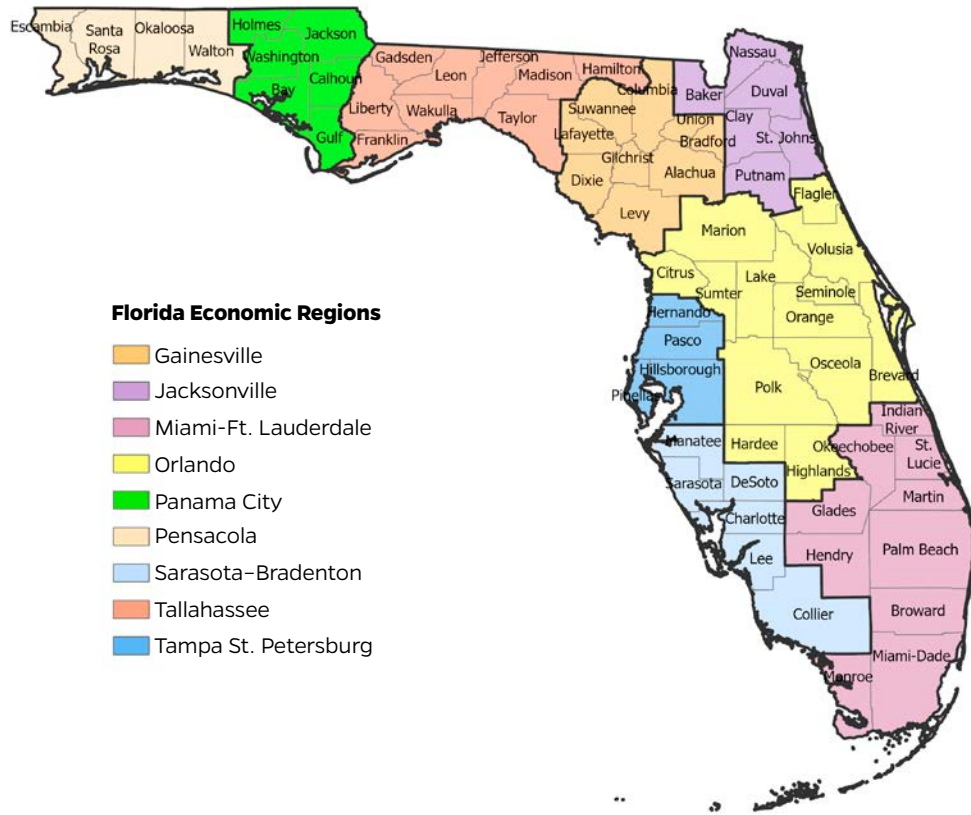


Figure 4. Map of Florida economic regions and counties.

Photo credit: Brooks Rehabilitation.





Photo credit: AdventHealth.

ECONOMIC CONTRIBUTION RESULTS

Hospital Economic Contributions

The statewide economic contributions of Florida hospitals in 2021, including direct, indirect, and induced regional multiplier effects in other sectors of the economy are summarized in Table 5. Total employment contributions were estimated at 878,913 fulltime and part-time jobs. Total industry output or business revenue contributions were \$177.76 billion (B). Value added contributions of \$88.57 B were comprised of \$59.93 B in labor income, \$24.90 B in property income (rents, dividends, interest, royalties, corporate dividends), and \$3.74 B in taxes on production and imports. Labor income is broken down into \$56.19 B for employee compensation from salaries and benefits, and \$3.74 B for proprietor or small business owner income. Total government tax contributions of \$18.42 B included \$2.50 B for county and sub-county taxes, \$2.48 B for state taxes, and \$13.43 B for federal taxes.

The direct multiplier effect of economic contributions represents activity within the hospital sector itself. Indirect multiplier effects arise from local supply chain purchases of inputs of goods and services for hospitals and other healthcare businesses, such as medical supplies, pharmaceuticals, utilities, maintenance services, etc. Induced multiplier effects represent economic activity generated by employee household spending within the state such as food, housing, personal care, transportation, and entertainment. Total economic contributions are the sum of direct, indirect, and induced multiplier effects. For Florida hospitals in 2021, indirect and induced multiplier effects represented 63.3 percent of total employment contributions and 59.9 percent of value added contributions.

Table 5. Summary of direct, indirect, and induced multiplier effects for economic contributions of Florida hospitals in 2021.

Metric	Direct	Indirect	Induced	Total
Employment (Jobs)	322,229	305,939	250,745	878,913
Output (M\$)	79,087	53,770	44,898	177,756
Value added (M\$)	35,488	27,382	25,698	88,568
Labor income	27,524	18,478	13,924	59,926
Employee compensation	27,524	16,156	12,509	56,189
Proprietor income	0	2,322	1,415	3,737
Other property income	7,370	7,667	9,866	24,903
Tax on production and imports	594	1,237	1,908	3,739
Total local, state and federal taxes (M\$)	7,275	5,706	5,434	18,415
Sub-county general taxes	91	187	288	566
Sub-county special districts taxes	155	319	491	965
County taxes	155	321	494	970
State taxes	432	817	1,235	2,484
Federal taxes	6,442	4,062	2,926	13,431

Values in million 2021 dollars or fulltime and part-time jobs.
Source: IMPLAN model and 2021 data for Florida.

Characteristics and economic contributions of hospitals are summarized by Florida region in Table 6, and employment and value added contributions are charted by region in Figure 5. Employment contributions were highest in the Miami-Ft. Lauderdale area (265,870 jobs), followed by the

Orlando area (212,399 jobs), Tampa-St. Petersburg (142,907 jobs), Jacksonville (88,804 jobs), Sarasota-Bradenton (72,731 jobs), Gainesville (31,877 jobs), Pensacola (30,021 jobs), Tallahassee (26,197 jobs), and Panama City (8,107 jobs).

Table 6. Economic contributions of hospitals in Florida economic regions, 2021.

Economic Region	Hospitals	Beds	Employees (FTE)	Revenue (M\$)	Output Contrib. (M\$)	Employment Contrib. (Jobs)	Labor Income Contrib. (M\$)	Value Added Contrib. (M\$)	Tax Contrib. (M\$)
Miami-Fort Lauderdale	93	23,342	95,288	24,667	53,771	265,870	18,127	26,792	5,571
Orlando	76	15,475	78,898	19,706	42,957	212,399	14,482	21,403	4,450
Tampa-St. Petersburg	48	11,042	50,362	13,259	28,902	142,907	9,744	14,401	2,994
Jacksonville	26	6,316	30,523	8,239	17,960	88,804	6,055	8,949	1,861
Sarasota-Bradenton	32	6,514	25,741	6,748	14,709	72,731	4,959	7,329	1,524
Gainesville	10	1,981	11,340	2,958	6,447	31,877	2,173	3,212	668
Pensacola	15	2,554	9,824	2,785	6,072	30,021	2,047	3,025	629
Tallahassee	10	2,259	10,315	2,430	5,298	26,197	1,786	2,640	549
Panama City	11	961	3,205	752	1,640	8,107	553	817	170
Total	321	70,444	315,497	81,544	177,756	878,913	59,926	88,568	18,415

Values in million 2021 dollars. Employment represents fulltime and part-time jobs unless otherwise noted. Contributions include multiplier effects. Numbers might not sum to state totals due to rounding. Source: IMPLAN model and 2021 data for Florida.

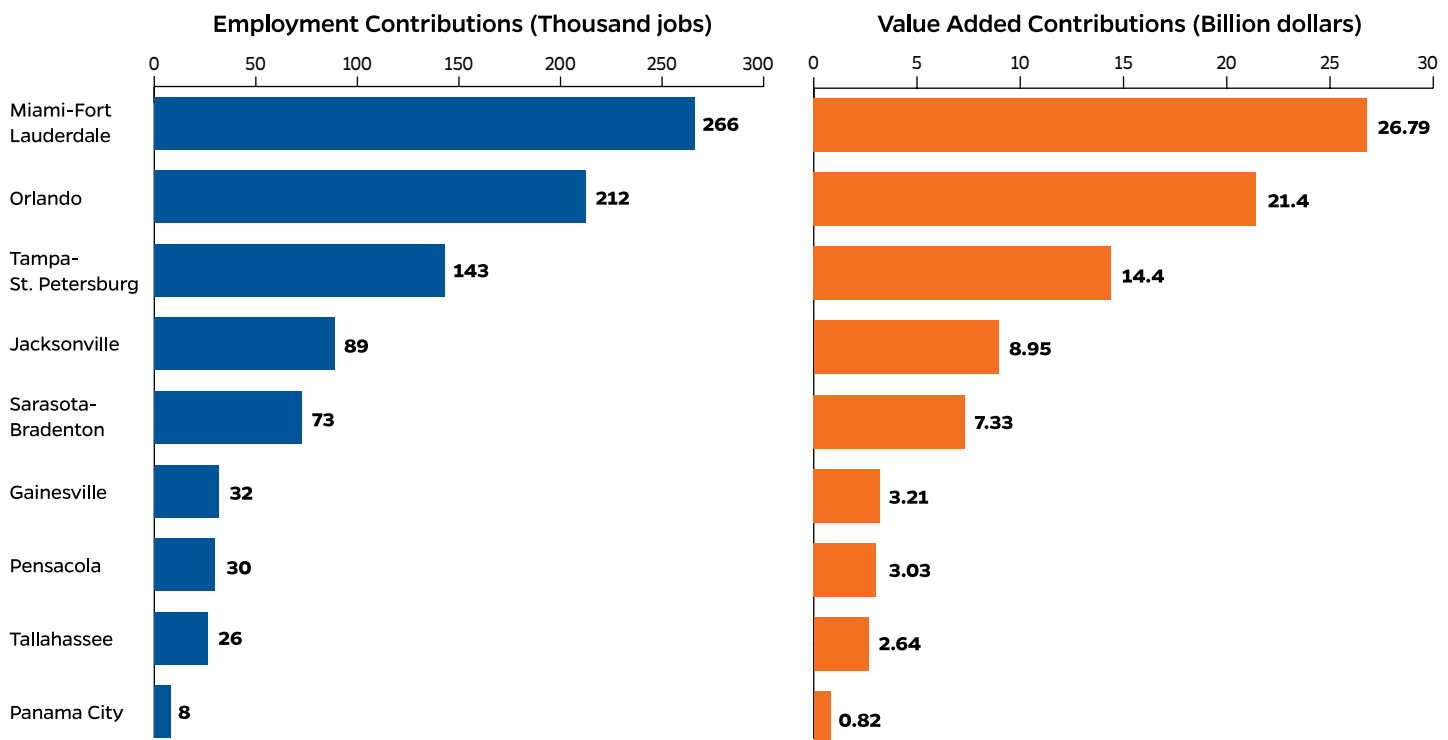


Figure 5. Chart of employment and value added contributions of hospitals in Florida economic regions. Source: IMPLAN model and 2021 data for Florida.

Licensed hospitals operated in 58 of Florida’s 67 counties in 2021. Economic contributions of hospitals in Florida counties are summarized in Table 7. The largest individual Florida counties in terms of hospital industry employment contributions were Miami-Dade (129,247 jobs), Orange

(82,276 jobs), Hillsborough (79,928 jobs), Broward (64,311 jobs), Duval (60,730 jobs), Palm Beach (46,975 jobs), Pinellas (39,585 jobs), Alachua (28,248 jobs), Lee (26,691 jobs), Volusia (20,470 jobs), Brevard (19,770 jobs), and Polk (19,313 jobs).

Table 7. Summary of economic contributions of hospitals in Florida counties, 2021.

County	Hospitals	Beds	Employees (FTE)	Revenue (M\$)	Output Contrib. (M\$)	Employment Contrib. (Jobs)	Labor Income Contrib. (M\$)	Value Added Contrib. (M\$)	Tax Contrib. (M\$)
Alachua	5	1,726	10,238	2,621	5,713	28,248	1,926	2,847	592
Baker	2	1,163	5,252	1,346	2,935	14,512	989	1,462	304
Bay	5	737	2,045	547	1,192	5,894	402	594	123
Bradford	1	5	17	7	14	70	5	7	1
Brevard	12	1,905	8,586	1,834	3,998	19,770	1,348	1,992	414
Broward	23	6,742	26,458	5,967	13,007	64,311	4,385	6,481	1,347
Calhoun	1	25	132	16	35	171	12	17	4
Charlotte	3	716	1,790	462	1,007	4,977	339	502	104
Citrus	2	332	1,223	319	696	3,440	235	347	72
Clay	3	572	2,090	617	1,345	6,652	454	670	139
Collier	7	1,075	4,377	1,166	2,543	12,572	857	1,267	263
Columbia	1	103	441	173	377	1,863	127	188	39
Desoto	1	49	228	51	111	549	37	55	12
Duval	16	3,989	20,605	5,634	12,282	60,730	4,141	6,120	1,272
Escambia	5	1,669	6,669	1,771	3,862	19,093	1,302	1,924	400
Flagler	1	99	1,049	316	688	3,403	232	343	71
Franklin	1	25	94	11	24	119	8	12	2
Gadsden	2	953	4,263	1,104	2,407	11,899	811	1,199	249
Gulf	1	19	112	18	39	191	13	19	4
Hardee	1	25	161	33	73	361	25	36	8
Hendry	1	25	220	41	90	446	30	45	9
Hernando	5	740	2,233	561	1,222	6,043	412	609	127
Highlands	3	330	1,777	381	831	4,108	280	414	86
Hillsborough	17	4,794	27,805	7,416	16,165	79,928	5,450	8,054	1,675
Holmes	1	20	144	18	40	196	13	20	4
Indian River	3	557	2,848	541	1,178	5,826	397	587	122
Jackson	2	125	578	113	247	1,221	83	123	26
Lake	4	866	4,228	1,040	2,268	11,214	765	1,130	235
Lee	9	2,107	9,418	2,476	5,398	26,691	1,820	2,690	559
Leon	5	1,208	5,678	1,275	2,779	13,741	937	1,385	288
Madison	1	25	103	16	35	175	12	18	4
Manatee	5	895	3,020	809	1,763	8,716	594	878	183
Marion	6	1,068	3,677	1,148	2,504	12,379	844	1,247	259
Martin	4	507	2,521	446	973	4,809	328	485	101
Miami-Dade	36	10,010	43,675	11,991	26,140	129,247	8,812	13,024	2,708
Monroe	4	210	680	232	506	2,503	171	252	52
Nassau	1	62	426	94	205	1,012	69	102	21
Okaloosa	5	470	1,492	593	1,292	6,387	435	644	134
Okeechobee	1	100	305	103	224	1,105	75	111	23
Orange	18	4,862	29,926	7,633	16,640	82,276	5,610	8,291	1,724

Continued on next page.

Table 7 (continued). Summary of economic contributions of hospitals in Florida counties, 2021.

County	Hospitals	Beds	Employees (FTE)	Revenue (M\$)	Output Contrib. (M\$)	Employment Contrib. (Jobs)	Labor Income Contrib. (M\$)	Value Added Contrib. (M\$)	Tax Contrib. (M\$)
Osceola	6	1,189	5,817	1,692	3,688	18,236	1,243	1,838	382
Palm Beach	17	4,334	15,150	4,358	9,500	46,975	3,203	4,734	984
Pasco	10	1,493	6,211	1,610	3,509	17,350	1,183	1,748	364
Pinellas	16	4,015	14,113	3,673	8,006	39,585	2,699	3,989	829
Polk	7	1,856	8,216	1,792	3,906	19,313	1,317	1,946	405
Putnam	1	99	335	93	202	998	68	101	21
Santa Rosa	3	279	966	211	459	2,270	155	229	48
Sarasota	7	1,672	6,908	1,784	3,888	19,227	1,311	1,937	403
Seminole	5	954	5,078	1,421	3,097	15,314	1,044	1,543	321
St. Johns	3	431	1,815	455	991	4,900	334	494	103
St. Lucie	4	857	3,432	988	2,153	10,646	726	1,073	223
Sumter	2	347	1,140	196	428	2,115	144	213	44
Suwannee	1	2	9	3	7	36	2	4	1
Taylor	1	48	177	24	53	263	18	26	6
Union	2	145	635	154	336	1,660	113	167	35
Volusia	9	1,642	8,020	1,899	4,140	20,470	1,396	2,063	429
Walton	2	136	697	211	459	2,272	155	229	48
Washington	1	35	195	40	88	434	30	44	9
Total	321	70,444	315,497	81,544	177,756	878,913	59,926	88,568	18,415

Values in million 2021 dollars or fulltime and part-time jobs unless otherwise noted.
Source: IMPLAN model and 2021 data for Florida.



Employment and value added contributions of hospitals in the top 25 Florida counties are charted in Figure 6, and mapped for all counties in Figures 7-8. Economic

contribution results for U.S. Congressional Districts and Florida Agency for Health Care Administration regions are shown in Appendix B.

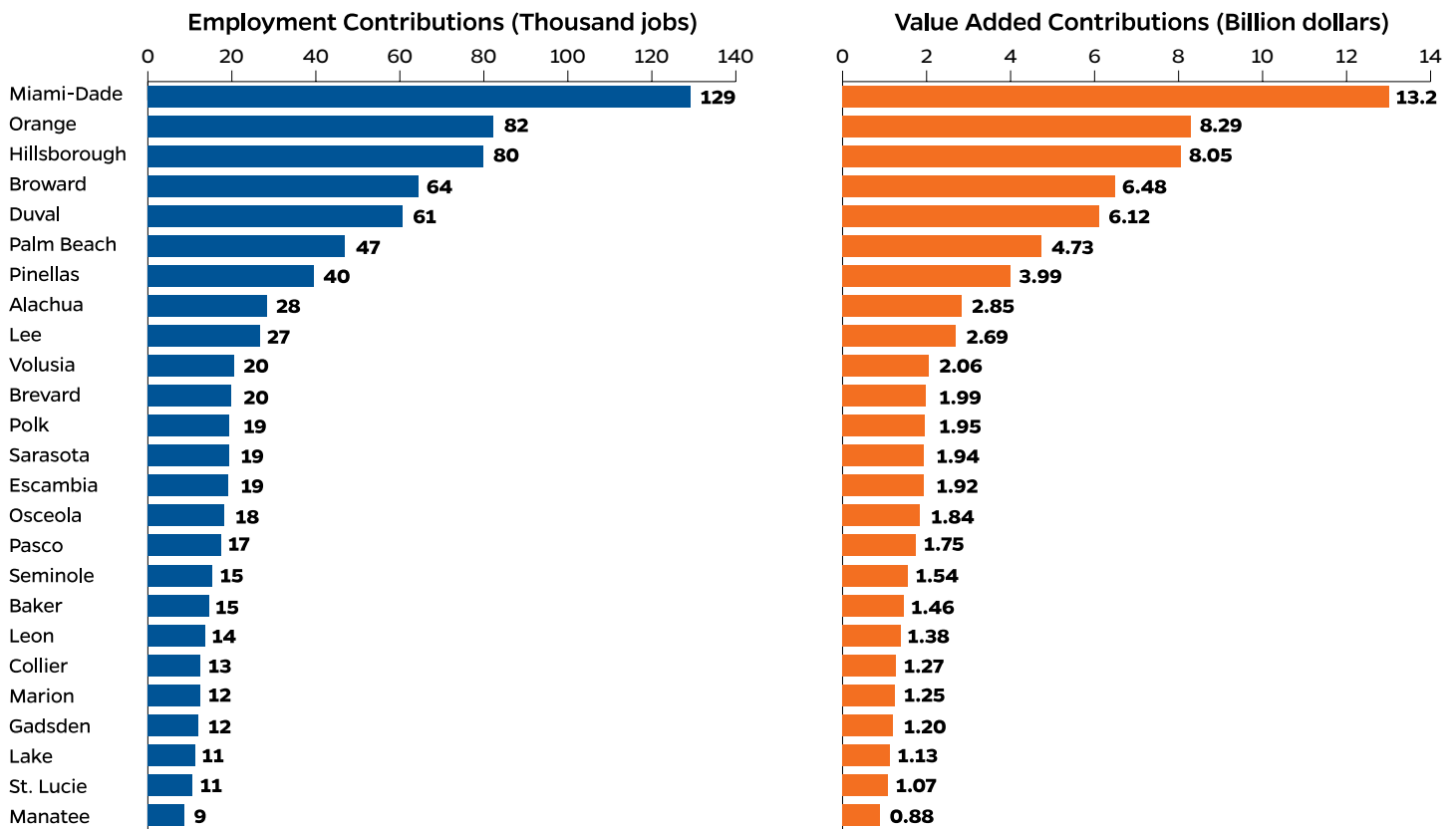


Figure 6. Chart of employment and value added contributions of hospitals in the top 25 Florida counties, 2021. Source: IMPLAN model and 2021 data for Florida.

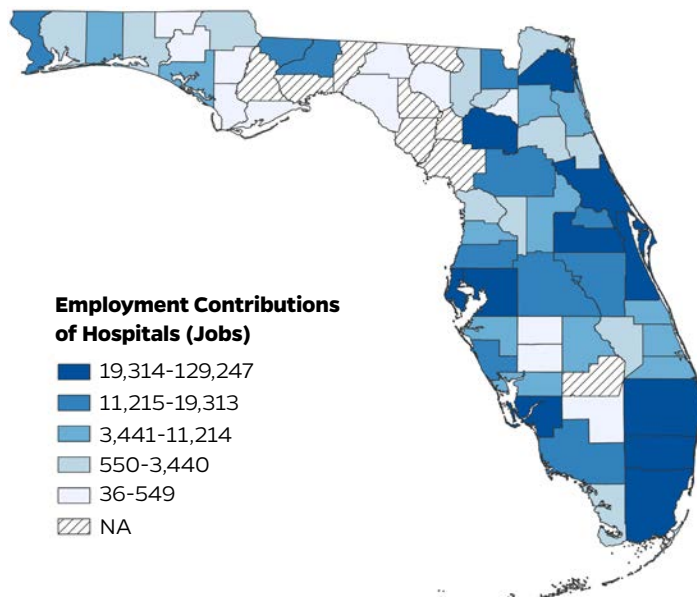


Figure 7. Map of employment contributions of hospitals in Florida counties, 2021. Source: IMPLAN model and 2021 data for Florida.

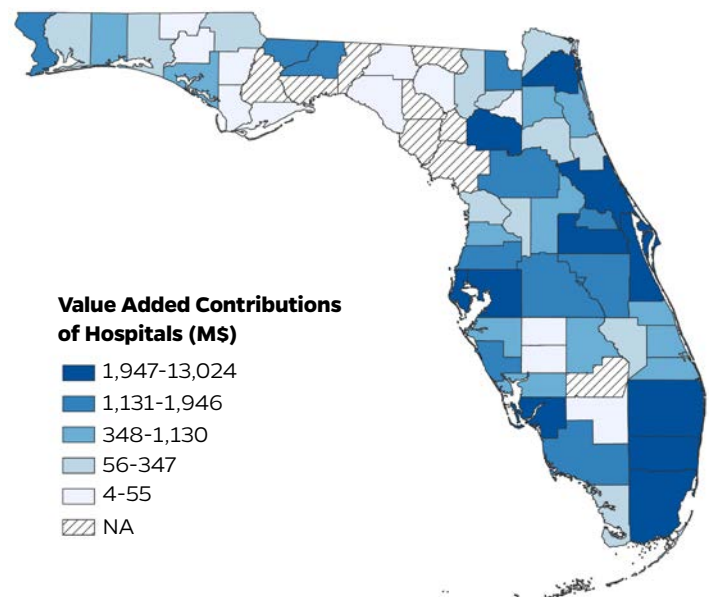


Figure 8. Map of value added contributions of hospitals in Florida counties, 2021. Source: IMPLAN model and 2021 data for Florida.

Economic contributions of Florida hospitals in major industry groups, defined according to the North American Industry Classification System (NAICS), are summarized in Table 8. Naturally, the largest contributions occurred in the Health and Social Services industry group, which includes the hospital sector, with total employment contributions of 382,260 jobs, output of \$86.53 billion,

and total value added of \$40.35 billion. The next largest sectors in terms of employment contributions were Administrative-Support-Waste Services (93,070 jobs), Professional-Scientific-Technical Services (68,178 jobs), Finance-Insurance (50,342 jobs), Accommodation-Food Services (49,743 jobs), Other Services (48,585), Real Estate-Rentals (46,307 jobs).

Table 8. Economic contributions of Florida hospitals by major industry group, 2021.

NAICS Industry	Employment (Jobs)	Labor Income Contributions (M\$)	Value Added Contributions (M\$)	Output Contributions (M\$)
11 Agriculture, forestry, fishing, hunting	2,165	80	105	193
21 Mining	141	3	10	65
22 Utilities	1,388	293	1,133	2,088
23 Construction	3,680	220	377	933
31-33 Manufacturing	5,825	379	711	2,142
42 Wholesale trade	15,613	1,778	3,795	6,535
44-45 Retail trade	39,417	1,603	2,737	4,493
48-49 Transportation, warehousing	31,988	1,181	1,463	3,127
51 Information	8,532	1,014	2,166	5,202
52 Finance, insurance	50,342	4,002	6,401	16,659
53 Real estate, rental	46,307	1,240	9,167	15,930
54 Professional, scientific & technical services	68,178	5,712	7,149	10,990
55 Management of companies	10,830	1,353	1,497	2,545
56 Administrative, support, and waste management services	93,070	4,425	5,119	9,578
61 Educational services	5,894	265	275	399
62 Health care, social assistance	382,260	31,676	40,347	86,527
71 Arts, entertainment, recreation	8,459	291	458	720
72 Accommodation, food services	49,743	1,593	2,488	4,447
81 Other services (except public administration)	48,585	2,200	2,321	3,623
9A Government enterprises	6,495	618	847	1,559
Total	878,913	59,926	88,568	177,756

Values in million 2021 dollars or fulltime and part-time jobs.
Source: IMPLAN model and 2021 data for Florida.

Photo credit: Tampa General Hospital.



Economic contributions of Florida hospitals are summarized in Table 9 by type of hospital facility (short term vs. long term, general, psychiatric, teaching, specialty),

as well as ownership (investor owned, not for profit, government), rural/urban county location, and trauma level.

Table 9. Economic contributions of Florida hospitals by type, ownership, urban/rural, and trauma level, 2021.

Hospital type	Hospitals	Beds	Employees (FTE)	Revenue (M\$)	Output (M\$)	Employment (Jobs)	Labor Income (M\$)	Value Added (M\$)	Taxes (M\$)
Short term, general	204	51,193	220,377	57,344	125,003	618,079	42,142	62,284	12,950
Short term, psychiatric	31	2,516	5,988	962	2,097	10,368	707	1,045	217
Short term, teaching	19	11,378	61,518	16,474	35,912	177,568	12,107	17,893	3,720
Short term, other specialty	24	2,415	17,679	4,596	10,018	49,535	3,377	4,992	1,038
Long term, general	27	1,606	4,815	998	2,175	10,753	733	1,084	225
Long term, psychiatric	2	140	400	41	89	438	30	44	9
Long term, teaching	1	100	415	84	184	911	62	92	19
Long term, other specialty	8	377	1,085	213	463	2,291	156	231	48
Type not available	5	719	3,220	832	1,814	8,971	612	904	188
Investor owned	154	24,191	67,055	19,904	43,389	214,538	14,628	21,619	4,495
Not for profit	136	35,618	198,691	50,433	109,939	543,594	37,063	54,778	11,390
Government	26	9,916	46,531	10,374	22,613	111,810	7,623	11,267	2,343
Ownership not available	5	719	3,220	832	1,814	8,971	612	904	188
Urban	282	65,955	294,589	76,240	166,195	821,752	56,029	82,808	17,218
Rural	24	1,122	5,829	1,406	3,064	15,152	1,033	1,527	317
Not available	15	3,367	15,080	3,898	8,496	42,009	2,864	4,233	880
Trauma level I	10	8,246	44,605	10,707	23,341	115,408	7,869	11,630	2,418
Trauma level II	23	11,093	46,098	11,909	25,959	128,356	8,752	12,934	2,689
Pediatric trauma	3	766	6,628	1,796	3,915	19,359	1,320	1,951	406
Total	321	70,444	315,497	81,544	177,756	878,913	59,926	88,568	18,415

Values in million 2021 dollars or fulltime and part-time jobs, unless otherwise noted.

Source: IMPLAN model and 2021 data for Florida.



Changes in operating characteristics and economic activity of Florida hospitals between 2015 and 2021 are summarized in Table 10, with results from previous studies for 2015 (Hodges et al., 2017) and 2019 reported in inflation-adjusted 2021 dollars to provide comparable results. Note that these results do not match with those in the original study reports. Over the 2015-21 period, output and value

added contributions increased by 21.4 and 5.9 percent, respectively, while employment contributions decreased by 2.5 percent. Since 2019, immediately prior to the COVID-19 pandemic, output and value added contributions increased by 13.1 and 7.9 percent, and employment decreased by 2.1 percent.

Table 10. Comparison of total economic contributions of Florida hospitals in 2015, 2019, and 2021.

Metric	2021	2019	2015	Change 2019-21	Change 2015-21
Employment (Jobs)	878,913	898,106	901,675	-2.1%	-2.5%
Output (M\$)	177,756	157,114	146,377	13.1%	21.4%
Value added (M\$)	88,568	82,053	83,595	7.9%	5.9%
Labor income (M\$)	59,926	57,160	58,358	4.8%	2.7%
Other property income (M\$)	24,903	20,259	20,383	22.9%	22.2%
Taxes on production and imports (M\$)	3,739	4,634	4,854	-19.3%	-23.0%
Taxes (M\$)	18,415	18,298	19,117	0.6%	-3.7%

Values in million 2021 dollars or fulltime and part-time jobs.
Source: IMPLAN model and 2015, 2017, 2019, and 2021 data for Florida.

Hospital Affiliated Healthcare Business Economic Contributions

Economic contribution results for Florida hospital affiliated businesses are summarized in Table 11. Total economic contributions, including indirect and induced multiplier

effects, included employment of 362,476 jobs, \$90.23 B in output or business revenues, \$32.77 B in value added, \$21.72 B in labor income, and \$5.03 B in taxes to local, state, and federal governments.

Table 11. Summary of economic contributions of hospital affiliated healthcare businesses in Florida, 2021.

Effect	Employment (Jobs)	Output (M\$)	Value Added (M\$)	Labor Income (M\$)	Taxes (M\$)
Direct effect	37,817	34,801	2,671	2,801	-1,009
Indirect effect	233,809	39,167	20,791	13,874	4,068
Induced effect	90,849	16,264	9,309	5,044	1,968
Total effect	362,476	90,233	32,771	21,719	5,027

Values in million 2021 dollars or fulltime and part-time jobs.
Source: IMPLAN model and 2021 data for Florida.

Economic contributions by major industry are shown in Table 12. In addition to the health care and social services sector with 68,896 jobs and \$5.48 B in value added, other major industries with large employment contributions via indirect and induced multiplier effects included

administrative-waste services (61,352 jobs), professional-scientific-technical services (38,657 jobs), accommodation-food services (37,429 jobs), real estate-rentals (36,601 jobs), transportation-warehousing (21,466 jobs), and finance-insurance (20,832 jobs).

Photo credit: Jupiter Medical Center.



Table 12. Economic contributions of hospital affiliated healthcare businesses in Florida by NAICS industry, 2021.

NAICS Industry	Employment (Jobs)	Output (M\$)	Value Added (M\$)	Labor Income (M\$)
11 Agriculture, forestry, fishing, hunting	779	69	38	29
21 Mining	69	32	6	2
22 Utilities	651	989	537	138
23 Construction	2,179	553	223	131
31-33 Manufacturing	3,080	1,097	389	206
42 Wholesale trade	9,013	3,725	2,182	1,062
44-45 Retail trade	15,043	3,168	1,449	615
48-49 Transportation, warehousing	21,466	1,952	893	725
51 Information	5,023	3,223	1,309	601
52 Finance, insurance	20,832	6,156	2,526	1,733
53 Real estate, rental	36,601	9,856	4,921	927
54 Professional, scientific & tech. services	38,657	6,161	3,980	3,232
55 Management of companies	14,326	3,366	1,981	1,790
56 Administrative, waste services	61,352	6,196	3,312	2,913
61 Educational services	2,212	151	103	100
62 Health, social services	68,896	37,743	5,482	5,018
71 Arts, entertainment, recreation	5,563	436	275	189
72 Accommodation, food services	37,429	3,246	1,902	1,226
81 Other services	15,826	1,317	839	749
92 Government	3,479	797	423	331
Total	362,476	90,233	32,771	21,719

Values in million 2021 dollars or fulltime and part-time jobs.
Source: IMPLAN model and 2021 data for Florida.

Economic contributions were allocated to Florida counties in proportion to expanded employment and revenue values, as shown in Table 13. Employment contributions were highest in the counties of Orange (59,221 jobs), Hillsborough (46,855 jobs), Brevard (46,081 jobs), Pinellas (40,611 jobs), Volusia

(17,004 jobs), Miami-Dade (16,579 jobs), Lee (16,399 jobs), and Duval (12,526 jobs). Output contributions were highest in Hillsborough (\$37.16 B), Duval (\$25.93 B), Pinellas (\$4.86 B), Orange (\$4.76 B), Brevard (\$4.21 B), Broward (\$2.20 B), Lake (\$1.63 B), Miami-Dade (\$1.43 B), and Bay (\$1.25 B).

Photo credit: Hendry Regional Medical Center.



Table 13. Economic contributions of hospital affiliated healthcare businesses in Florida counties, 2021.

County	Number of Companies	Employment (Jobs)	Output (M\$)	Value Added (M\$)	Labor Income (M\$)	Taxes (M\$)
Alachua	10	4,742	300	109	72	17
Bay	5	7,746	1,245	452	300	69
Brevard	38	46,081	4,212	1,530	1,014	235
Broward	61	10,769	2,195	797	528	122
Calhoun	1	113	0	0	0	0
Charlotte	11	2,324	157	57	38	9
Citrus	12	2,891	0	0	0	0
Clay	8	1,360	10	4	2	1
Collier	9	6,773	1,090	396	262	61
Columbia	3	3,127	508	185	122	28
Duval	50	12,526	25,929	9,417	6,241	1,445
Escambia	18	1,370	142	52	34	8
Flagler	1	378	0	0	0	0
Gulf	2	19	0	0	0	0
Hamilton	1	104	9	3	2	1
Hernando	10	3,165	331	120	80	18
Highlands	11	7,671	37	14	9	2
Hillsborough	38	46,855	37,163	13,497	8,945	2,070
Indian River	9	6,046	153	56	37	9
Lake	17	3,354	1,625	590	391	91
Lee	19	16,399	493	179	119	27
Leon	10	3,391	230	84	55	13
Manatee	15	2,286	397	144	96	22
Marion	12	2,324	110	40	27	6
Martin	5	453	154	56	37	9
Miami-Dade	60	16,579	1,431	520	344	80
Monroe	3	6,339	74	27	18	4
Nassau	5	491	2	1	0	0
Okaloosa	12	1,889	17	6	4	1
Okeechobee	1	38	4	1	1	0
Orange	57	59,221	4,759	1,729	1,146	265
Osceola	8	2,617	360	131	87	20
Palm Beach	60	8,984	582	211	140	32
Pasco	19	4,799	105	38	25	6
Pinellas	47	40,611	4,856	1,764	1,169	271
Polk	12	1,436	389	141	94	22
Putnam	1	463	0	0	0	0
Santa Rosa	6	945	159	58	38	9
Sarasota	12	2,910	188	68	45	10
Seminole	10	3,013	62	22	15	3

Continued on next page.

Table 13 (continued). Economic contributions of hospital affiliated healthcare businesses in Florida counties, 2021.

County	Number of Companies	Employment (Jobs)	Output (M\$)	Value Added (M\$)	Labor Income (M\$)	Taxes (M\$)
St. Johns	13	1,625	32	12	8	2
St. Lucie	14	661	36	13	9	2
Sumter	2	9	0	0	0	0
Taylor	1	151	0	0	0	0
Volusia	1	17,004	685	249	165	38
Wakulla	25	0	1	0	0	0
Walton	1	425	0	0	0	0
Total	3	362,476	90,233	32,771	21,719	5,027

Values in million 2021 dollars or fulltime and part-time jobs.
Source: IMPLAN model and 2021 data for Florida.



Photo credit: Tampa General Hospital.

Combined Economic Contributions of Hospitals and Affiliated Businesses

The combined economic contributions of hospitals and hospital affiliated health care businesses are summarized in Table 14. The total economic contributions of Florida hospitals and affiliated businesses in 2021, including multiplier effects in other supporting sectors of the economy, were 1.24 million fulltime and part-time jobs, \$267.99 B in industry output or sales revenues, \$121.34 B in total value added, \$81.65 B in labor income (earnings to employees and business owners), and \$23,442 B in taxes paid to local, state, and federal governments (Table 14). Hospitals themselves represented 75 percent of the combined employment contributions and 64 percent of the combined value added contributions. The combined value added contributions of hospitals and affiliated businesses represented 9.7 percent of Florida’s Gross State Product in 2021 and the employment contributions represented 9.9 percent of the state workforce.

Table 14. Summary of total economic contributions of Florida hospitals and hospital affiliated healthcare businesses, 2021.

Metric	Hospitals	Hospital Affiliated	Total
Employment (Jobs)	878,913	362,476	1,241,389
Output (M\$)	177,756	90,233	267,988
Value added (M\$)	88,568	32,771	121,339
Labor income (M\$)	59,926	21,719	81,645
Taxes (M\$)	18,415	5,027	23,442

Values in million 2021 dollars or fulltime and part-time jobs. Source: IMPLAN model and 2021 data for Florida.

Government tax contributions of Florida hospitals and affiliated businesses totaled \$23.44 B, including \$4.66 B in state and local taxes and \$18.78 B in federal taxes (Table 15). The largest federal tax items were personal income tax (\$9.08 B), and social insurance or Social Security taxes

for employees (\$5.17 B) and employers (\$4.44 B). Some categories of federal taxes were negative because of government subsidies to health care sectors.

Table 15. Government tax contributions of hospital affiliated healthcare businesses in Florida, 2021.

Government Level/Tax Item	Tax Contributions (M\$)
State and local government	4,664
Corporate profits tax	228
Personal tax: motor vehicle license	54
Personal tax: other tax (fish/hunt)	4
Personal tax: property taxes	16
Social insurance tax- employee contribution	7
Social insurance tax- employer contribution	8
TOPI: Motor vehicle license	28
TOPI: other taxes	379
TOPI: property tax	1,611
TOPI: sales tax	2,174
TOPI: severance tax	2
TOPI: special assessments	155
Federal government	18,778
Corporate profits tax	1,037
Personal tax: income tax	9,077
Social insurance tax- employee contribution	5,165
Social insurance tax- employer contribution	4,435
TOPI: custom duty	-477
TOPI: excise taxes	-458
Total	23,442

Values in million 2021 dollars. “TOPI” stands for tax on production and imports.

Source: IMPLAN model and 2021 data for Florida.

Photo credit: Tallahassee Memorial HealthCare.



Estimated results summarizing the economic contributions of hospitals and affiliated businesses for each economic region of Florida are shown in Table 16. The Orlando, Miami-Fort Lauderdale, and Tampa-St. Petersburg

regions have the highest values in terms of employment contributions. Estimated results of economic contributions for each of Florida's 67 counties are shown in Table 17.

Table 16. Economic contributions of hospitals and hospital affiliated healthcare businesses in Florida regions, 2021.

Region	Employees (FTE)	Revenue (M\$)	Employment Contributions (Jobs)	Output Contributions (M\$)	Value Added Contributions (M\$)	Labor Income Contributions (M\$)	Tax Contributions (M\$)
Orlando	94,353	24,152	358,396	55,197	25,849	17,428	5,132
Miami-Fort Lauderdale	100,567	26,348	315,739	58,399	28,473	19,242	5,828
Tampa-St. Petersburg	60,464	28,682	238,336	71,358	29,820	19,963	5,359
Jacksonville	32,266	17,674	105,269	43,933	18,382	12,306	3,308
Sarasota-Bradenton	28,990	7,592	103,423	17,033	8,173	5,518	1,653
Gainesville	12,173	3,251	39,746	7,255	3,506	2,368	713
Pensacola	10,314	2,901	34,650	6,390	3,141	2,123	647
Tallahassee	10,701	2,518	29,843	5,538	2,727	1,844	562
Panama City	4,039	1,204	15,985	2,884	1,269	852	239
Total	353,868	114,323	1,241,389	267,988	121,339	81,645	23,442

Values in million 2021 dollars or fulltime and part-time jobs.
Source: IMPLAN model and 2021 data for Florida.

Photo credit: Nicklaus Children's Hospital.



The largest individual Florida counties in terms of employment contributions were Miami-Dade (145,826 jobs), Orange (141,497 jobs), Hillsborough (126,783 jobs), Pinellas (80,196 jobs), Broward (75,080 jobs), Duval (73,256 jobs), Brevard (65,851 jobs), Palm Beach (55,959 jobs),

Lee (43,090 jobs), Volusia (37,474 jobs), Alachua (32,990 jobs), and Pasco (22,149 jobs), as shown in Table 18. Maps of employment and value added contributions of hospitals and affiliated healthcare businesses in Florida counties are shown in Figures 9-10.

Table 17. Economic contributions of hospitals and hospital affiliated healthcare businesses in Florida counties in 2021.

County	Employees (FTE)	Revenue (M\$)	Employment Contributions (Jobs)	Output Contributions (M\$)	Value Added Contributions (M\$)	Labor Income Contributions (M\$)	Tax Contributions (M\$)
Alachua	10,740	2,730	32,990	6,013	2,955	1,998	609
Baker	5,252	1,346	14,512	2,935	1,462	989	304
Bay	2,865	999	13,640	2,437	1,046	701	193
Bradford	17	7	70	14	7	5	1
Brevard	13,464	3,364	65,851	8,210	3,522	2,362	649
Broward	27,598	6,764	75,080	15,202	7,278	4,913	1,470
Calhoun	144	16	284	35	17	12	4
Charlotte	2,036	519	7,301	1,163	558	377	113
Citrus	1,529	319	6,331	696	347	235	72
Clay	2,234	621	8,012	1,355	674	456	140
Collier	5,094	1,562	19,345	3,633	1,663	1,120	324
Columbia	772	358	4,990	885	372	249	67
Desoto	228	51	549	111	55	37	12
Duval	21,931	15,054	73,256	38,211	15,537	10,382	2,717
Escambia	6,814	1,823	20,463	4,003	1,976	1,336	408
Flagler	1,089	316	3,781	688	343	232	71
Franklin	94	11	119	24	12	8	2
Gadsden	4,263	1,104	11,899	2,407	1,199	811	249
Gulf	114	18	210	39	19	13	4
Hamilton	11	3	104	9	3	2	1
Hardee	161	33	361	73	36	25	8
Hendry	220	41	446	90	45	30	9
Hernando	2,568	681	9,207	1,553	729	492	145
Highlands	2,589	395	11,779	868	428	289	88
Hillsborough	32,765	20,916	126,783	53,328	21,551	14,395	3,745
Holmes	144	18	196	40	20	13	4
Indian River	3,488	596	11,872	1,332	643	434	131
Jackson	578	113	1,221	247	123	83	26
Lake	4,583	1,631	14,568	3,893	1,720	1,156	325
Lee	11,154	2,655	43,090	5,891	2,869	1,938	587
Leon	6,037	1,358	17,132	3,009	1,468	992	301
Madison	103	16	175	35	18	12	4
Manatee	3,262	953	11,002	2,159	1,022	690	205
Marion	3,923	1,189	14,703	2,614	1,288	871	266

Continued on next page.

Table 17 (continued). Economic contributions of hospitals and hospital affiliated healthcare businesses in Florida counties in 2021.

County	Employees (FTE)	Revenue (M\$)	Employment Contributions (Jobs)	Output Contributions (M\$)	Value Added Contributions (M\$)	Labor Income Contributions (M\$)	Tax Contributions (M\$)
Martin	2,569	502	5,263	1,126	540	365	109
Miami-Dade	45,430	12,511	145,826	27,570	13,544	9,157	2,788
Monroe	1,351	259	8,842	580	279	188	57
Nassau	478	94	1,504	206	103	69	21
Okaloosa	1,692	599	8,276	1,309	650	440	135
Okeechobee	309	104	1,143	227	113	76	23
Orange	36,195	9,362	141,497	21,399	10,019	6,755	1,989
Osceola	6,094	1,823	20,853	4,049	1,969	1,330	402
Palm Beach	16,101	4,570	55,959	10,082	4,945	3,343	1,017
Pasco	6,719	1,648	22,149	3,614	1,787	1,208	369
Pinellas	18,412	5,437	80,196	12,862	5,753	3,868	1,100
Polk	8,368	1,933	20,749	4,295	2,087	1,410	426
Putnam	384	93	1,461	202	101	68	21
Santa Rosa	1,066	268	3,214	618	286	193	56
Sarasota	7,216	1,852	22,136	4,076	2,006	1,356	413
Seminole	5,397	1,443	18,327	3,159	1,566	1,059	324
St. Johns	1,987	466	6,525	1,023	506	342	104
St. Lucie	3,502	1,001	11,307	2,190	1,086	735	225
Sumter	1,141	196	2,124	428	213	144	44
Suwannee	9	3	36	7	4	2	1
Taylor	193	24	414	53	26	18	6
Union	635	154	1,660	336	167	113	35
Volusia	9,820	2,148	37,474	4,825	2,312	1,561	467
Wakulla	0	0	0	1	0	0	0
Walton	742	211	2,697	459	229	155	48
Washington	195	40	434	88	44	30	9
Total	353,868	114,323	1,241,389	267,988	121,339	81,645	23,442

Values in million 2021 dollars or fulltime and part-time jobs unless otherwise noted.

Source: IMPLAN model and 2021 data for Florida.

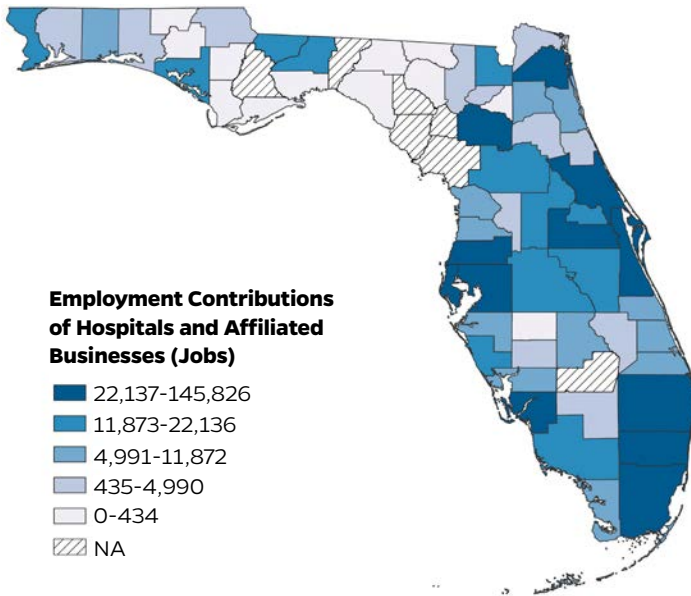


Figure 9. Map of employment contributions of hospitals and affiliated businesses in Florida counties, 2021.
 Source: IMPLAN model and 2021 data for Florida, authors' calculations, and ArcGIS software.

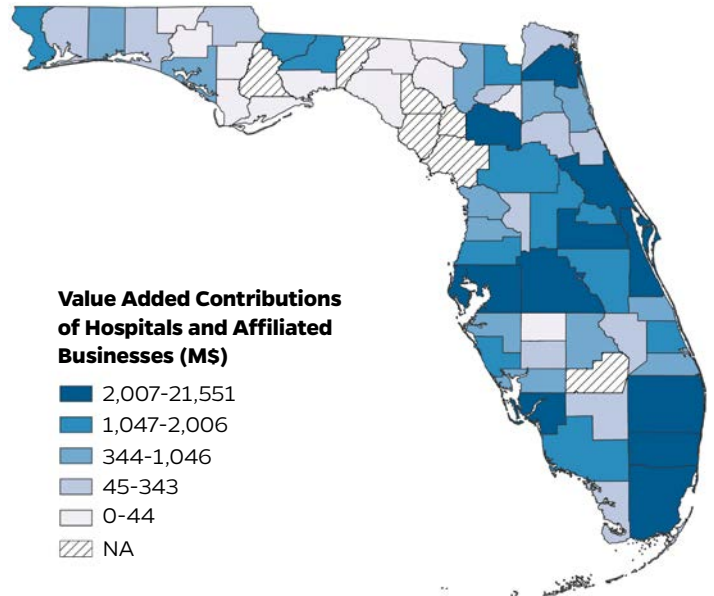


Figure 10. Map of value added contributions of hospitals and affiliated businesses in Florida counties, 2021.
 Source: IMPLAN model and 2021 data for Florida, authors' calculations, and ArcGIS software.

Photo credit: Nicklaus Children's Baker Hospital.



Photo credit: Bay Care (St Joseph's Childrens Hospital).



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APPENDIX A: GLOSSARY OF ECONOMIC ANALYSIS TERMS

Terms are presented in a logical order rather than alphabetical order.

Direct effects/contributions. Direct contributions represent the revenues, value added, income, or jobs that result directly from an economic activity within a regional economy.

Employment or Jobs. Represents the total numbers of wage and salaried employees as well as self-employed jobs. This includes fulltime, part-time, and seasonal workers measured in annual average jobs.

Indirect Business Taxes. Include sales, excise, and property taxes as well as fees and licenses paid by businesses during normal operations. It does not include taxes on profits or income.

Indirect effects/contributions. Indirect effects occur when businesses use revenues originating from outside the region to purchase inputs (goods and services) from local suppliers. This secondary, or indirect business, generates additional revenues, income, jobs and taxes for the area economy.

Induced effects/contributions. Induced effects or contributions only occur when new or outside dollars are introduced into a local economy. Induced economic contributions occur as the households of business owners and employees spend their earnings from these enterprises to purchase consumer goods and services from other businesses within the region. This induced effect generates additional revenues, income, jobs and taxes for the area economy.

Input-Output Analysis. The use of input-output models to estimate how revenues or employment for one or more particular industries, businesses or events in a regional economy will impact other businesses and institutions in that region, and the regional as a whole.

Input-Output Models. A mathematical representation of economic activity within a defined region using inter-industry transaction tables or matrices where the outputs of various industries are used as inputs by those same industries and other industries as well.

Labor Income. All forms of employment compensation, including employee wages and salaries, and proprietor income or profits.

Local revenues/expenditures. Local revenues or spending represent simple transfers between individuals or businesses within a regional economy. These transactions do

not generate economic spin-off or multiplier (indirect and induced) effects.

Margins. Represent the differences between retail, wholesale, distributor and producers prices.

Non-local revenues/expenditures. When outside or new revenues flow into a local economy either from the sale of locally produced goods and services to points outside the study area, or from expenditures by non-local visitors to the study area, additional economic repercussions occur through indirect and induced effects.

Regional Purchase Coefficient (RPC). The fractional proportion of regional demands (purchases) that are supplied by local producers or merchants (inside the region). RPCs are used to account for imports within the input-output model.

Other Property Type Income. Represents corporate profits in addition to payments for rents, royalties, dividends and interest.

Output. Revenues or sales associated with an industry or economic activity.

Total Contributions. The sum of direct, indirect and induced effects or economic contributions.

Value Added. Includes wages and salaries, interest, rent, profits, and indirect taxes paid by businesses, and also represents the activity's contribution to Gross Domestic Product or Gross State Product.



Photo credit: Health First.

APPENDIX B: ECONOMIC CONTRIBUTIONS OF HOSPITALS IN FLORIDA CONGRESSIONAL AND ADMINISTRATIVE DISTRICTS, 2021

Table B-1. Economic Contributions of Hospitals by Florida Congressional District (U.S. House of Representatives).

Congressional	Hospitals	Beds	Employees (FTE)	Revenue (M\$)	Output (M\$)	Employment (Jobs)	Labor Income (M\$)	Value Added (M\$)	Taxes (M\$)
1	14	2,504	9,601	2,727	5,946	29,398	2,004	2,962	616
2	22	3,270	13,744	3,240	7,064	34,927	2,381	3,520	732
3	18	4,212	20,270	5,452	11,886	58,768	4,007	5,922	1,231
4	8	1,953	8,875	2,107	4,592	22,705	1,548	2,288	476
5	15	3,101	16,061	4,693	10,231	50,588	3,449	5,098	1,060
6	7	1,351	7,326	1,788	3,898	19,273	1,314	1,942	404
7	9	1,443	7,157	1,940	4,229	20,912	1,426	2,107	438
8	15	2,462	11,434	2,375	5,177	25,597	1,745	2,579	536
9	10	1,621	7,575	2,075	4,524	22,369	1,525	2,254	469
10	9	3,669	23,667	6,099	13,295	65,739	4,482	6,624	1,377
11	11	1,974	9,869	2,387	5,204	25,733	1,755	2,593	539
12	13	2,049	6,982	1,831	3,991	19,734	1,346	1,989	413
13	12	2,801	8,380	2,271	4,950	24,475	1,669	2,466	513
14	13	3,954	19,299	4,900	10,682	52,816	3,601	5,322	1,107
15	9	1,773	14,023	3,689	8,041	39,757	2,711	4,006	833
16	8	1,692	5,920	1,696	3,697	18,280	1,246	1,842	383
17	11	2,179	8,412	2,155	4,699	23,233	1,584	2,341	487
18	14	2,385	10,906	2,401	5,235	25,883	1,765	2,608	542
19	10	2,767	12,069	3,216	7,010	34,663	2,363	3,493	726
20	10	2,393	6,119	1,677	3,656	18,075	1,232	1,821	379
21	11	1,875	8,240	2,057	4,483	22,167	1,511	2,234	464
22	7	2,172	6,567	1,812	3,949	19,526	1,331	1,968	409
23	9	2,864	10,993	2,626	5,725	28,309	1,930	2,853	593
24	6	1,904	7,339	1,671	3,643	18,012	1,228	1,815	377
25	11	3,136	15,642	3,587	7,820	38,664	2,636	3,896	810
26	16	3,995	16,739	4,656	10,150	50,186	3,422	5,057	1,052
27	14	3,447	15,868	4,461	9,724	48,079	3,278	4,845	1,007
28	8	1,186	5,716	1,789	3,899	19,279	1,314	1,943	404

Values in million 2021 dollars or fulltime and part-time jobs, unless otherwise noted.

Table B-2. Economic Contributions of Hospitals by Florida Agency for Health Care Administration Region.

AHCA Region	Hospitals	Beds	Employees (FTE)	Revenue (M\$)	Output (M\$)	Employment (Jobs)	Labor Income (M\$)	Value Added (M\$)	Taxes (M\$)
1	15	2,554	9,824	2,785	6,072	30,021	2,047	3,025	629
2	21	3,220	13,520	3,183	6,938	34,303	2,339	3,457	719
3	30	5,433	24,177	6,315	13,766	68,067	4,641	6,859	1,426
4	35	7,958	39,258	10,361	22,586	111,679	7,614	11,254	2,340
5	26	5,508	20,324	5,282	11,515	56,936	3,882	5,737	1,193
6	34	8,010	41,471	10,558	23,015	113,798	7,759	11,467	2,384
7	41	8,910	49,407	12,580	27,424	135,596	9,245	13,664	2,841
8	27	5,534	22,449	5,853	12,759	63,089	4,302	6,357	1,322
9	29	6,355	24,255	6,435	14,028	69,362	4,729	6,990	1,453
10	23	6,742	26,458	5,967	13,007	64,311	4,385	6,481	1,347
11	40	10,220	44,355	12,224	26,646	131,750	8,983	13,276	2,760
Total	321	70,444	315,497	81,544	177,756	878,913	59,926	88,568	18,415

Values in million 2021 dollars or fulltime and part-time jobs, unless otherwise noted.

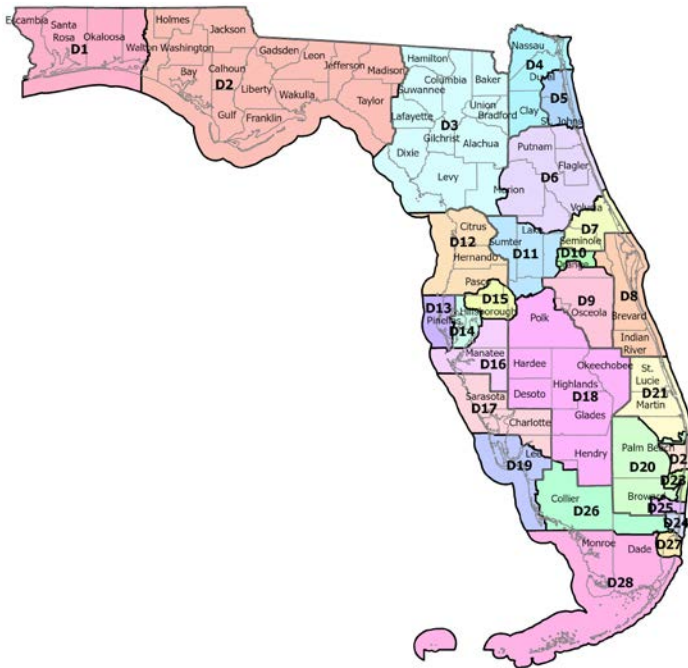


Figure B-1. Map of Florida Congressional Districts (U.S. House of Representatives).
Source: Florida House Redistricting Committee.

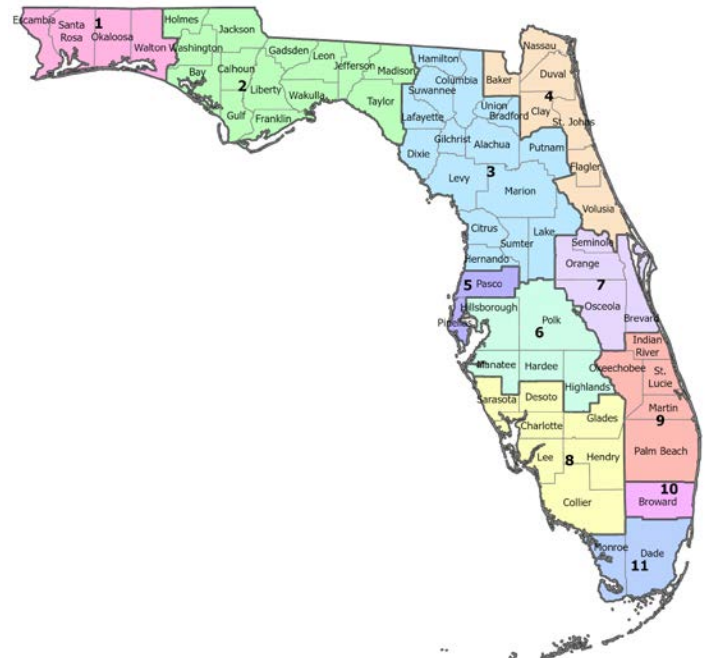


Figure B-2. Map of Florida AHCA Districts.
Source: Florida Agency for Health Care Administration.



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