

# **Economic Contributions of Hospitals in Florida**

## ***Sponsored Project Final Report to the Florida Hospital Association, Orlando, FL***

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### **Executive Summary**

This study evaluated the broad economic contributions of hospitals in the state of Florida in 2007, using data on hospital beds, revenues, expenditures, and employment from the Florida Hospital Uniform Reporting System, together with regional economic models developed with the *IMPLAN Professional* software to estimate multiplier effects arising in other sectors of the local economy from input purchases and spending by employees and governments.

Characteristics of 280 non-federal licensed hospitals operating in Florida in 2007 included:

- 61,323 beds,
- 233,586 fulltime equivalent employees,
- \$31.87 billion in operating expenses,
- \$14.64 billion paid in employee salaries and benefits,
- \$32.31 billion in net revenues,
- \$30.14 billion in non-local sources such as health insurance, Medicaid and Medicare.

Estimated total statewide economic contributions of Florida hospitals in 2007 included:

- 659,240 fulltime and part-time jobs,
- \$79.9 billion in industry output or sales revenues,
- \$45.8 billion in value added, representing personal and business income, and property income,
- 2.48 percent share of Gross Domestic Product of Florida from direct value added of \$17.29 billion,
- \$32.1 billion in labor income to employees and business owners,
- \$9.3 billion in property income, such as rents, dividends and interest payments,
- \$2.6 billion in indirect business taxes paid to local and state governments

Regionally, total employment contributions of Florida hospitals were greatest in the Miami-Ft.

Lauderdale area (227,516 jobs), followed by the Orlando area (155,598), Tampa-St. Petersburg (102,016), Sarasota-Bradenton (52,863), Jacksonville (51,721), Gainesville (26,188), Pensacola (21,649), Tallahassee (12,738), and Panama City (8,950). The largest individual Florida counties in terms of employment impacts were Miami-Dade (110,373 jobs), Broward (60,743) Orange (54,283), Hillsborough (49,378), Duval (42,536), Pinellas (40,488), Palm Beach (39,088), Alachua (23,380), Polk (18,490), Brevard (18,460), Lee (17,452), Volusia (17,177) and Escambia (15,147).

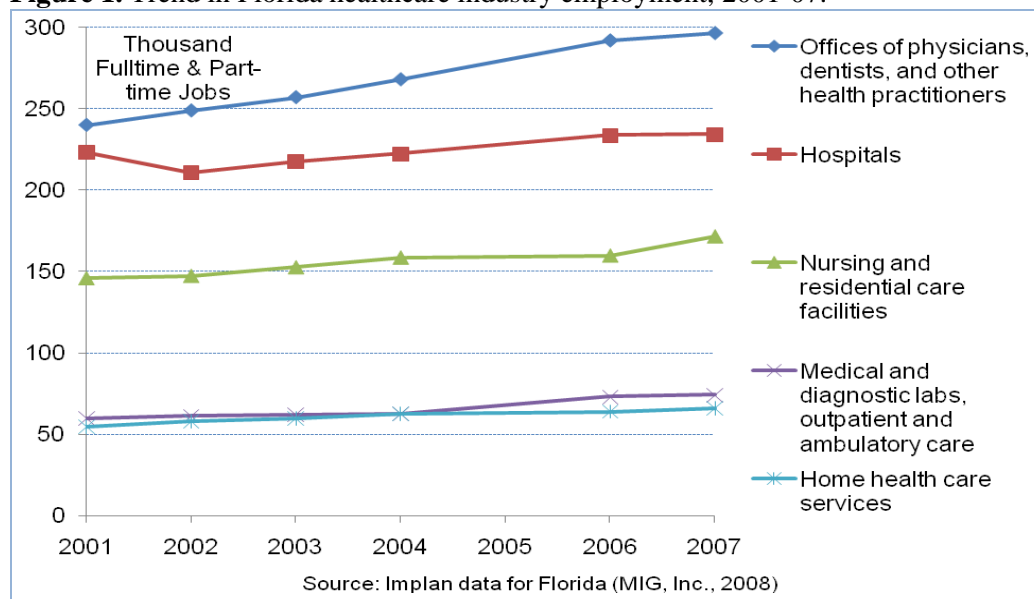
Given the significant role of hospitals in the local economy, reductions in hospital funding would have far reaching impacts on the state and its communities. For example, a hypothetical \$100 million reduction in Medicaid funding to Florida hospitals by the State of Florida is estimated to result in the elimination of 2,187 jobs, reduce output by \$258 million, and reduce value added by \$157 million.

### Introduction

Healthcare is a major driver of economic activity in the United States, valued at \$2.2 trillion in 2007, representing approximately 16.2 percent of Gross Domestic Product. The healthcare industry experienced average annual growth of 8.8 percent over the past 10 years, which was well above the U.S. average over the same time. Activity in the healthcare sector has also been relatively stable compared to many other sectors of the economy. Hospitals are an important component of the healthcare industry, providing acute care, emergency, trauma, psychiatric and rehabilitation services valued at \$697 billion annually, or 31 percent of total U.S. healthcare expenditures. Hospitals in the U.S. directly employ nearly 5.3 million people and account for 14.8 million jobs, including multiplier effects, according to a recent study by Avalere Health sponsored by the American Hospital Association (AHA, 2009).

Healthcare services are important in the state of Florida due to its rapidly growing and aging population. The healthcare industry serves as a source of economic development, to attract new residents and businesses to the state. Total employment in the healthcare sector in Florida has grown from about 724,000 in 2001 to nearly 843,000 in 2007, representing average annual growth of 2.7 percent (Figure 1).

**Figure 1.** Trend in Florida healthcare industry employment, 2001-07.



Hospitals are the second largest segment of the healthcare industry in Florida, behind offices of physicians, dentists and other health practitioners. Florida currently has 296 hospitals, with a total of 65,816

beds, and 225,000 fulltime equivalent employees, according to data from the Florida Hospital Association (FHA, Oct. 2008). Among Florida's full-service community hospitals, 84 were investor owned, 95 were not-for-profit, and 31 were public institutions, plus 12 federal facilities. Florida hospitals offering specialized services included psychiatric treatment (33), rehabilitation (15), long-term treatment (22), children's care (12), rural patient care (26), and teaching (7). In 2007 these facilities provided care to 2.3 million patients over 10.8 million patient-days, and performed nearly 1.9 million surgeries. Florida hospitals provide high skill, high wage jobs, with annual earnings averaging \$52,661 in 2006.

The purpose of this project is to estimate the annual economic contributions of hospital operations in the state of Florida and its regions and counties, including values generated indirectly in other sectors of the economy via multiplier effects. This report updates a previous study for 1999 (Anderson, Wieand and Colie, 1999).

## **Methods**

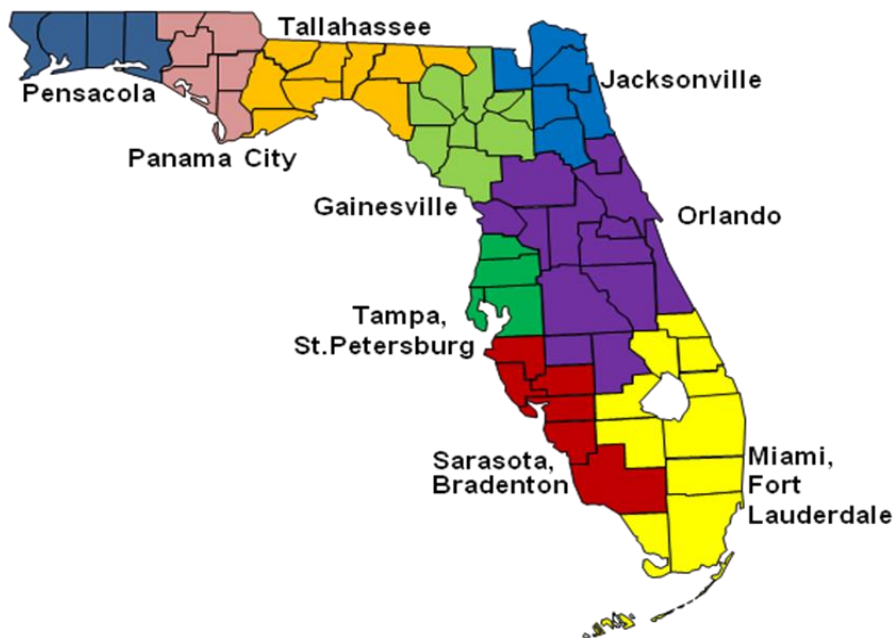
Data on revenues, expenditures, fulltime equivalent employment and number of beds for all Florida hospitals in 2007 were obtained from the Florida Hospital Uniform Reporting System (FHURS) maintained by the Florida Agency for Healthcare Administration. Reporting to the FHURS is required for non-federal licensed hospitals under Florida law. Procedures for reporting through an online system are described in a user manual, and data largely conform to Generally Accepted Accounting Principles (GAAP), with minor exceptions. Expenditure information reported includes total operating expenses, employee salaries, and non-operating expenses for amortization and depreciation. Revenues are reported for payments received from health insurance, health maintenance organizations (HMO), Medicaid, Medicare, local government, and self paying individuals. Discounts to employees, bad debts, and unpaid services rendered to indigent patients are reported as negative revenue amounts. Non-local sources of revenues, such as health insurance, Medicaid and Medicare, net of administrative and employee discounts and local matching contributions to Medicaid, represent new monies to the state or region that give rise to multiplier effects through re-spending in other sectors of the economy. Information was available for a total of 280 Florida hospitals in 2007. Seven new facilities that opened in 2008 were excluded from this analysis, as well as some federal hospitals that are not required to report information. In some cases where consolidated data were reported for a number of hospital facilities owned by a parent company, values were disaggregated based on the number of beds, in order to provide an accurate accounting by location. A complete listing of Florida hospitals operating in 2007 is provided in Appendix B.

The broad economic contributions of hospitals in Florida were evaluated with regional economic models constructed with the *IMPLAN Professional* software and associated Florida state and county datasets for 2007 (MIG, Inc. 2008). This type of model for input-output analysis augmented with social accounting matrices enables estimation of the secondary impacts of industry activities in the local economy arising through input purchases from vendors, and through spending by employee households and governments, known as indirect and induced multiplier effects, respectively (Miller and Blair). A glossary of economic impact analysis terminology

is provided in Appendix A. Models were constructed for the state of Florida and for each of the state's 67 counties, using default parameters and trade flow assumptions, and all social accounts internalized. This means that the multiplier effects captured expenditures by households, local, state and federal governments, and capital investment generated by new resources garnered by the hospital industry. Estimated economic contributions at the county level were normalized to match with total values at the state level. Spending by hospitals that occurs within the state or county was accounted for by regional purchase coefficients in *IMPLAN* that represent the average share of goods and services provided from local sources. A summary of input purchase coefficients for hospitals used in the *IMPLAN* model for Florida is provided in Appendix C.

Financial data and estimates of economic contribution for Florida hospitals were summarized by county and regions. The functional economic regions of Florida, indicated in Figure 2, represent metropolitan areas and surrounding non-metro counties that are economically linked, as defined by the U.S. Department of Commerce-Bureau of Economic Analysis, based on employee commuting patterns reported in the 2000 Census and other data such as newspaper readership (Johnson and Kort, 2004). Economic contribution estimates for hospitals were also summarized by major industry groups defined according to the North American Industry Classification System (NAICS).

**Figure 2.** Economic regions of Florida.



Source: US Department of Commerce, Bureau of Economic Analysis.

## Results

### Hospital Employment, Expenditures and Revenues

Available information on Florida hospital operations employment, expenditures and revenues in 2007 are summarized in Table 1. For the 280 non-federal licensed hospital facilities operating in Florida, there were a total of 61,323 beds, and 233,586 fulltime equivalent employees. Total operating expenses amounted to \$31.87 billion (Bn), including employee salaries of \$11.94 Bn, and employee benefits of \$2.70 Bn. Non-operating expenses included depreciation and amortization (\$1.76 Bn) and interest on borrowed capital (\$625 million). Total revenues amounted to \$32.31 Bn, including insurance payments (\$17.11 Bn), Medicare (\$13.15 Bn), Medicaid (\$3.36 Bn), other local government revenue (\$1.66 Bn). Matching contributions to Medicaid from local governments in Florida amounted to \$722 million (Mn). Charity, bad debt and self-pay revenue was a negative total (-\$304 Mn), but it was not possible to disaggregate these values because they were reported as a lump sum. Funds restricted for indigent care were \$1.2 Mn. Administrative, employee and policy discounts to revenues amounted to -\$2.70 Bn. Total revenues from non-local sources were estimated at \$30.14 Bn, including payments from health insurance, Medicaid and Medicare, net of discounts and local matching Medicaid contributions.

**Table 1.** Summary of Florida hospital operations, employment, expenditures and revenues, 2007

Number Hospitals	280
Number Beds	61,323
Fulltime Equivalent Employees	233,586
Total Operating Expenses (Mn\$)	31,871.2
Employee Salaries (Mn\$)	11,939.5
Employee Benefits (Mn\$)	2,696.6
Total Non-Operating Expenses (Mn\$)	2,381.5
Interest Expense (Mn\$)	624.5
Depreciation and Amortization Expenses (Mn\$)	1,757.0
Total Revenues (Mn\$)	32,312.7
Insurance Based Revenue (Mn\$)	17,111.0
Medicare / HMO Revenue (Mn\$)	13,153.0
Medicaid / HMO Revenue (Mn\$)	3,357.5
Other (Local) Government Revenue (Mn\$)	1,656.4
Charity, Bad Debt, Self-Pay Revenue (Mn\$)	-304.3
Administrative, Employee and Policy Discounts (Mn\$)	-2,759.7
Restricted Funds for Indigent Care (Mn\$)	1.2
Total Non-Local Revenues Net of Discounts and Local Matching* (Mn\$)	30,139.3

\*Note: non-local revenues include health insurance, Medicaid and Medicare payments received, net of administrative, employee and policy discounts and local matching Medicaid funds.

Operating expenditures that occurred within Florida were estimated at \$26.6 Bn or 83.5 percent of total operating expenses, while the remaining amount (16.5%) is purchased from outside the state, based on regional purchase coefficients developed with the *IMPLAN* model for Florida. For example the share of purchases of “In-vitro diagnostic substance manufacturing” within Florida is 19.5 percent (Appendix C). Expenditures for items purchased from outside the region are known as a “leakage” which has no economic impact on local economy.

## Statewide Economic Contributions

Total statewide economic contributions of Florida hospitals in 2007, including multiplier effects for all other sectors of the economy, are summarized in Table 2. Employment impacts were estimated at 659,240 fulltime and part-time jobs. Total output or revenue impacts were estimated at \$79.88 Bn. Impacts on value added, or personal and business net income, amounted to \$45.84 Bn. Value added includes all wages, salaries and benefits paid to workers, business profits, property income, capital consumption (depreciation) and indirect business taxes. The sum of direct value added across all industry sectors is equivalent to Gross Domestic Product (GDP), the broadest measure of aggregate economic activity. Direct value added by hospitals (\$17.29 Bn) represented 2.48 percent of GDP of Florida in 2007 (\$698.26 Bn). Labor income impacts to employee and business owner compensation were \$32.08 Bn. Impacts on other property income, such as rents, dividends and interest, were \$9.26 Bn. Impacts on indirect business taxes paid to local and state governments were estimated at \$2.60 Bn including taxes for *ad valorem* property, sales, excise, and motor fuels, but excluding income taxes.

**Table 2.** Summary of statewide economic contributions of Florida hospitals in 2007.

Impact Measure	Direct Impact	Indirect Impact	Induced Impact	Total Impact	Total Multiplier Effect
Employment (fulltime & part-time jobs)	249,107	93,637	316,495	659,240	2.65
Output or Revenue (million)	\$32,313	\$12,041	\$35,529	\$79,882	2.47
Total Value Added (million)	\$17,292	\$7,047	\$21,498	\$45,836	2.65
Labor Income (million)	\$14,391	\$3,966	\$13,725	\$32,082	2.23
Other Property Income (million)	\$801	\$2,481	\$5,973	\$9,256	11.56
Indirect Business Taxes (million)	\$202	\$600	\$1,800	\$2,602	12.88

Note: Direct impacts represent values for hospitals. Indirect impacts represent activity generated in other sectors that furnish inputs to the hospital industry. Induced impacts reflect economic activity due to spending by employee households and governments, and capital investment.

The direct component of economic contributions represents activity with the hospital sector, while indirect effects are for input purchases through the vendor supply chain, and induced effects represent employee household and government spending arising from non-revenues to the hospital sector. The indirect and induced effects represented approximately 62 percent of the total employment impact, 60 percent of the total output

impact and 62 percent of the total value added impact, implying an overall multiplier effect of 2.65, 2.47 and 2.65, respectively (Table 2).

Given the significant role of hospitals in the local economy, reductions in hospital funding would have far reaching effects on the state and its communities. For example, a hypothetical \$100 million reduction in Medicaid funding to Florida hospitals by the State of Florida is estimated to result in the elimination of 2,187 jobs, reduce output by \$258 million, and reduce value added by \$157 million.

### **Financial Characteristics and Economic Contributions in Florida Regions and Counties**

Hospitals operated in 58 of Florida's 67 counties in 2007. Financial and operating characteristics of Florida hospitals are summarized by region and county in Table 3. The largest regions for hospital employment (FTE) were Miami-Ft. Lauderdale (77,253), Orlando (56,821) and Tampa-St. Petersburg (34,159), followed by Jacksonville (19,675), Sarasota-Bradenton (18,905), Gainesville (9,264), Pensacola (7,638), Tallahassee (6,321) and Panama City (3,550). The largest Florida counties for hospital employment were Miami-Dade (36,134), Broward (21,060) Orange (18,930), Hillsborough (16,562), Duval (15,335), Palm Beach (13,293) and Pinellas (12,602). In addition, six other counties had at least 5,000 fulltime equivalent employees (Alachua, Brevard, Escambia, Lee, Polk, Volusia).

Economic contributions of Florida hospitals are summarized by region and county in Table 4. Total employment impacts (fulltime and part-time jobs) were 227,516 in the Miami-Ft. Lauderdale region, 155,598 in the Orlando area, 102,016 in Tampa-St. Petersburg, 52,863 in Sarasota-Bradenton, 51,721 in Jacksonville, 26,188 in Gainesville, 21,649 in Pensacola, 12,738 in Tallahassee, and 8,950 in the Panama City area. The largest individual Florida counties in terms of employment impacts were Miami-Dade (110,373 jobs), Broward (60,743) Orange (54,283), Hillsborough (49,378), Duval (42,536), Pinellas (40,488), Palm Beach (39,088), Alachua (23,380), Polk (18,490), Brevard (18,460), Lee (17,452), Volusia (17,177) and Escambia (15,147). Total output, value added, labor income and indirect business tax impacts across regions and counties were roughly proportional to these employment impacts.

**Table 3.** Hospital employment, expenses and revenues in Florida regions and counties in 2007.

Region / County	Number Hospitals	Number of Beds	Fulltime Equivalent Employees	Operating Expenses (million \$)	Employee Salaries (million \$)	Net Revenues (million \$)	Non-Local Revenues Net of Discounts and Local Matching* (million \$)
<b>Miami-Fort Lauderdale</b>	<b>90</b>	<b>21,725</b>	<b>77,253</b>	<b>11,240.2</b>	<b>4,240.9</b>	<b>10,603.6</b>	<b>9,814.9</b>
Broward	25	6,449	21,060	2,927.6	1,186.4	2,414.3	2,603.2
Hendry	1	25	152	18.0	6.9	13.9	13.9
Indian River	3	554	1,857	233.8	93.8	204.1	214.0
Martin	3	424	2,031	249.5	106.1	218.2	218.2
Miami-Dade	33	9,457	36,134	5,263.6	1,989.2	4,742.5	5,071.9
Monroe	4	267	726	118.9	40.3	98.5	98.5
Okeechobee	1	100	326	45.8	16.0	46.8	46.8
Palm Beach	17	3,839	13,293	2,105.8	712.6	1,784.6	1,784.6
St. Lucie	3	610	1,674	277.2	89.5	292.0	292.0
<b>Orlando</b>	<b>62</b>	<b>11,831</b>	<b>56,821</b>	<b>7,033.3</b>	<b>2,751.1</b>	<b>8,268.2</b>	<b>7,713.2</b>
Brevard	9	1,582	7,301	911.6	366.5	779.8	779.8
Citrus	2	326	1,517	203.1	60.6	172.7	180.4
Flagler	1	99	490	65.0	23.6	80.3	80.3
Hardee	1	25	110	13.6	4.7	14.2	14.2
Highlands	3	335	1,245	164.7	55.8	154.8	154.8
Lake	4	657	3,340	451.9	162.1	419.9	429.4
Marion	6	779	3,215	442.3	154.8	410.2	416.5
Orange	14	3,308	18,930	2,229.4	900.8	2,991.9	3,003.9
Osceola	4	514	2,514	340.7	126.1	430.2	430.2
Polk	6	1,746	7,152	816.7	343.3	792.9	792.9
Seminole	3	773	4,028	514.0	196.2	680.6	680.6
Sumter	1	192	409	53.6	20.3	47.6	47.6
Volusia	8	1,495	6,572	826.5	336.3	738.1	770.3
<b>Tampa-St. Petersburg</b>	<b>39</b>	<b>9,458</b>	<b>34,159</b>	<b>4,995.1</b>	<b>1,754.3</b>	<b>5,057.8</b>	<b>4,722.5</b>
Hernando	5	584	1,827	248.0	86.6	244.1	244.1
Hillsborough	13	3,699	16,562	2,405.9	861.1	2,274.1	2,305.4
Pasco	5	1,075	3,169	481.6	167.9	441.5	441.5
Pinellas	16	4,100	12,602	1,859.5	638.6	1,762.6	1,787.2
<b>Sarasota-Bradenton</b>	<b>26</b>	<b>5,665</b>	<b>18,905</b>	<b>2,686.7</b>	<b>1,009.4</b>	<b>2,652.5</b>	<b>2,533.7</b>
Charlotte	3	665	2,114	301.5	102.6	263.1	263.1
Collier	5	906	3,544	516.4	193.6	483.0	485.9
DeSoto	1	49	225	23.4	10.5	24.2	24.2
Lee	6	1,694	5,939	802.0	339.7	841.3	844.0
Manatee	4	849	2,295	358.1	121.5	325.0	325.0
Sarasota	7	1,502	4,788	685.3	241.4	597.1	613.1
<b>Jacksonville</b>	<b>18</b>	<b>4,989</b>	<b>19,675</b>	<b>2,609.4</b>	<b>930.3</b>	<b>2,461.8</b>	<b>2,269.3</b>
Baker	2	1,163	1,193	68.3	37.1	18.2	18.2
Clay	2	310	1,064	163.4	57.4	159.1	159.1
Duval	11	3,005	15,335	2,134.7	739.9	1,860.7	1,884.3
Nassau	1	54	310	33.6	15.6	35.6	35.6

Region / County	Number Hospitals	Number of Beds	Fulltime Equivalent Employees	Operating Expenses (million \$)	Employee Salaries (million \$)	Net Revenues (million \$)	Non-Local Revenues Net of Discounts and Local Matching* (million \$)
Putnam	1	141	448	54.9	21.2	49.8	49.8
St. Johns	1	316	1,325	154.6	59.1	145.8	146.1
<b>Gainesville</b>	<b>12</b>	<b>1,897</b>	<b>9,264</b>	<b>1,212.9</b>	<b>457.3</b>	<b>1,206.9</b>	<b>1,145.3</b>
Alachua	5	1,473	7,803	1,060.3	393.7	1,023.7	1,023.7
Bradford	1	25	203	21.0	11.1	20.7	20.7
Columbia	2	166	730	95.6	36.4	75.4	78.3
Levy	1	40	61	5.6	2.2	4.9	4.9
Suwannee	1	15	146	14.7	7.9	13.9	13.9
Union	2	178	321	15.6	6.0	6.8	6.8
<b>Pensacola</b>	<b>14</b>	<b>2,410</b>	<b>7,638</b>	<b>1,071.8</b>	<b>354.2</b>	<b>1,131.9</b>	<b>1,040.3</b>
Escambia	4	1,497	5,119	716.6	236.3	675.6	697.9
Okaloosa	4	456	1,519	231.7	74.2	252.2	252.2
Santa Rosa	4	349	540	67.7	23.7	50.2	50.2
Walton	2	108	460	55.8	19.9	62.3	62.3
<b>Tallahassee</b>	<b>9</b>	<b>2,425</b>	<b>6,321</b>	<b>606.6</b>	<b>286.0</b>	<b>504.2</b>	<b>488.3</b>
Franklin	1	25	85	6.7	2.9	4.4	4.4
Gadsden	1	1,230	2,283	114.0	91.7	1.3	1.3
Leon	5	1,097	3,646	459.6	180.3	457.5	457.5
Madison	1	25	81	6.8	3.1	6.9	6.9
Taylor	1	48	226	19.5	8.0	18.3	18.3
<b>Panama City</b>	<b>10</b>	<b>923</b>	<b>3,550</b>	<b>415.2</b>	<b>156.2</b>	<b>425.9</b>	<b>411.7</b>
Bay	5	694	2,776	345.1	124.2	343.8	343.8
Calhoun	1	25	58	5.7	2.1	5.0	5.0
Holmes	1	20	95	7.2	3.7	7.5	7.5
Jackson	2	125	478	42.6	20.3	42.3	42.3
Washington	1	59	144	14.6	5.9	13.2	13.2
<b>Grand Total</b>	<b>280</b>	<b>61,323</b>	<b>233,586</b>	<b>31,871.2</b>	<b>11,939.5</b>	<b>32,312.7</b>	<b>30,139.3</b>

Source: Agency for Healthcare Administration, Florida Hospital Uniform Reporting System.

\*Non-local revenues include health insurance, Medicaid and Medicare payments received, net of administrative, employee and policy discounts, and local government matching Medicaid funds.

**Table 4.** Total economic contributions of hospitals in Florida regions and counties in 2007.

Region / County	Employment (fulltime & part-time jobs)	Output (Revenue) (million \$)	Value Added (million \$)	Labor Income (million \$)	Indirect Business Taxes (million \$)
<b>Miami-Fort Lauderdale</b>	<b>227,516</b>	<b>28,131</b>	<b>16,456</b>	<b>11,743</b>	<b>974</b>
Broward	60,743	7,331	4,219	3,132	254
Hendry	285	24	13	13	1
Indian River	4,420	484	277	209	16
Martin	5,009	556	320	247	19
Miami-Dade	110,373	13,558	8,026	5,774	469
Monroe	1,819	243	145	96	7
Okeechobee	761	96	51	37	2
Palm Beach	39,088	5,160	3,009	2,001	183
St. Lucie	5,018	678	396	234	22
<b>Orlando</b>	<b>155,598</b>	<b>18,973</b>	<b>10,645</b>	<b>7,143</b>	<b>591</b>
Brevard	18,460	2,004	1,113	876	59
Citrus	3,374	357	193	143	10
Flagler	1,251	164	94	56	5
Hardee	233	26	14	10	1
Highlands	3,086	324	183	127	9
Lake	8,303	923	515	369	28
Marion	8,776	975	531	374	30
Orange	54,283	7,441	4,209	2,610	230
Osceola	7,389	995	573	330	31
Polk	18,490	1,991	1,099	819	62
Seminole	13,925	1,842	1,035	611	65
Sumter	852	97	52	42	2
Volusia	17,177	1,835	1,036	775	59
<b>Tampa-St. Petersburg</b>	<b>102,016</b>	<b>12,898</b>	<b>7,322</b>	<b>4,915</b>	<b>421</b>
Hernando	4,562	533	284	191	14
Hillsborough	49,378	6,391	3,683	2,474	211
Pasco	7,588	936	530	364	26
Pinellas	40,488	5,038	2,825	1,886	170
<b>Sarasota-Bradenton</b>	<b>52,863</b>	<b>6,326</b>	<b>3,604</b>	<b>2,535</b>	<b>212</b>
Charlotte	5,315	613	345	237	18
Collier	9,545	1,178	708	487	40
DeSoto	422	40	21	20	1
Lee	17,452	2,087	1,168	844	73
Manatee	6,726	820	457	313	27
Sarasota	13,403	1,589	904	634	53
<b>Jacksonville</b>	<b>51,721</b>	<b>6,068</b>	<b>3,498</b>	<b>2,562</b>	<b>188</b>
Baker	1,610	31	15	60	1
Clay	2,953	376	211	133	12
Duval	42,536	5,178	3,007	2,157	161

Region / County	Employment (fulltime & part-time jobs)	Output (Revenue) (million \$)	Value Added (million \$)	Labor Income (million \$)	Indirect Business Taxes (million \$)
Nassau	629	68	35	31	2
Putnam	937	92	48	42	2
St. Johns	3,057	323	182	139	11
<b>Gainesville</b>	<b>26,188</b>	<b>2,844</b>	<b>1,660</b>	<b>1,223</b>	<b>83</b>
Alachua	23,380	2,599	1,527	1,098	77
Bradford	402	38	21	21	1
Columbia	1,594	164	88	77	4
Levy	108	9	4	4	0
Suwannee	273	25	14	14	1
Union	431	10	5	9	0
<b>Pensacola</b>	<b>21,649</b>	<b>2,608</b>	<b>1,496</b>	<b>977</b>	<b>75</b>
Escambia	15,147	1,779	1,034	685	53
Okaloosa	4,326	580	332	199	15
Santa Rosa	1,048	115	61	46	3
Walton	1,128	134	69	47	4
<b>Tallahassee</b>	<b>12,738</b>	<b>1,067</b>	<b>610</b>	<b>588</b>	<b>30</b>
Franklin	142	9	5	5	0
Gadsden	2,895	3	1	135	0
Leon	9,172	1,018	585	427	29
Madison	142	11	5	5	0
Taylor	387	27	14	16	1
<b>Panama City</b>	<b>8,950</b>	<b>969</b>	<b>545</b>	<b>396</b>	<b>29</b>
Bay	7,514	851	483	335	26
Calhoun	115	9	5	4	0
Holmes	170	13	7	7	0
Jackson	884	73	38	39	2
Washington	266	23	12	12	0
<b>Grand Total</b>	<b>659,240</b>	<b>79,882</b>	<b>45,836</b>	<b>32,082</b>	<b>2,602</b>

## Economic Contributions by Industry Group

Total economic impacts of Florida hospitals are summarized by major industry group in Table 5. Naturally, the largest impacts occurred in the health and social services group in which the direct impacts of hospitals occur, with total employment impacts of 298,183 jobs, total output impacts of \$36.64 Bn, and total value added impacts of \$19.97 Bn. In addition, however, employment impacts in excess of 20,000 jobs also occurred in Transportation and Warehousing (49,891 jobs), Government (49,146), Real Estate and Rental (33,995), Professional, Scientific and Technical Services (33,755), Administrative and Waste Services (32,491), Accommodation and Food Services (28,935), Other Services (25,846), Construction (25,068), and Finance and Insurance (20,033).

**Table 5.** Summary of economic contributions of Florida hospitals, by major industry group in 2007.

Industry Group (NAICS*)	Employment (fulltime & part-time jobs)	Output (Mn\$)	Value Added (Mn\$)	Labor Income (Mn\$)	Other Property Type Income (Mn\$)	Indirect Business Taxes (Mn\$)
Agriculture, Forestry, Fishing	2,528	187	98	38	56	4
Mining	267	98	25	13	11	2
Utilities	1,391	850	585	176	314	95
Construction	25,068	3,533	1,474	1,215	233	25
Manufacturing	10,022	3,410	990	673	277	40
Wholesale Trade	13,831	2,417	1,569	924	299	346
Transportation & Warehousing	49,891	3,321	2,307	1,441	354	512
Retail Trade	10,011	1,127	544	403	112	28
Information	5,875	1,643	762	390	304	67
Finance & Insurance	20,033	3,974	1,864	1,253	526	85
Real Estate & Rental	33,995	7,501	5,525	737	3,929	859
Professional, Scientific & Tech. Services	33,755	3,769	2,239	1,893	300	46
Management of Companies	5,166	1,126	638	514	114	10
Administrative & Waste Services	32,491	1,932	1,171	973	173	25
Educational Services	6,423	381	217	197	17	3
Health & Social Services	298,183	36,641	19,971	16,590	1,248	236
Arts, Entertainment & Recreation	6,385	460	292	182	74	37
Accommodation & Food Services	28,935	1,815	955	654	192	108
Other Services	25,846	1,619	859	628	158	73
Government	49,146	4,078	3,751	3,186	565	0
<b>Total</b>	<b>659,240</b>	<b>79,882</b>	<b>45,836</b>	<b>32,082</b>	<b>9,256</b>	<b>2,602</b>

\*Industry groups classified according to the North American Industry Classification System.

## Tax Impacts

The impacts of Florida hospitals on local, state and federal government tax revenues in 2007 are summarized in Table 6. Total tax impacts in 2007 were estimated at \$10.39 Bn, including \$7.57 Bn to the Federal government and \$2.85 Bn to state and local governments. The largest individual tax items were federal income taxes (\$3.02 Bn), employer and employee contributions to federal social insurance tax or “Social Security” (\$1.81 Bn each, respectively), Florida sales taxes (\$1.11 Bn), Florida property taxes (\$863 Mn), and federal corporate profits taxes (\$687 Mn).

**Table 6.** Total tax impacts of Florida hospitals on government tax revenues, 2007

Government / Tax Item	Amount (Mn\$)
<b>Federal Government (Non-Defense)</b>	<b>7,569.2</b>
Corporate Profits Tax	687.3
Customs Duty	53.0
Excise Taxes	126.8
Indirect business Non-Taxes	63.5
Income Tax	3,021.5
Social Insurance Tax- Employee Contribution	1,805.6
Social Insurance Tax- Employer Contribution	1,811.6
<b>State and Local Government (Non-Education)</b>	<b>2,849.8</b>
Corporate Profits Tax	104.6
Dividends	173.4
Motor Vehicle Licenses	16.9
Other Indirect Business Taxes	276.7
Property Tax	863.0
Non-Taxes	90.7
Sales Tax	1,114.2
Severance Tax	2.0
Motor Vehicle License	35.6
Fines, Fees	111.9
Fishing, Hunting Licenses	2.2
Social Ins Tax- Employee Contribution	11.1
Social Ins Tax- Employer Contribution	47.6
<b>Enterprises (Corporations) transfers</b>	<b>-25.0</b>
<b>Total</b>	<b>10,394.0</b>

Note: total tax impacts include direct, indirect and induced multiplier effects.

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## **Appendix A: Glossary of Economic Impact Terms**

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

**Region** defines the geographic area for which impacts are estimated. Regions are generally an aggregation of one or more counties. Economic regions identified in this paper were defined based on worker commuting patterns.

**Sector** is a grouping of industries that produce similar products or services, or production processes. Most economic reporting and models in the U.S. are based on the Standard Industrial Classification system (SIC code) or the North American Industrial Classification System (NAICS).

**Impact analysis** estimates the impact of a change in output or employment resulting from a change in final demand to households, governments or exports.

**Input-output (I-O) model.** An input-output model is a representation of the flows of economic activity between industry sectors within a region. The model captures what each business or sector must purchase from every other sector in order to produce its output of goods or services. Using such a model, flows of economic activity associated with any change in spending may be traced backwards (e.g., purchases of plants that leads growers to purchase additional inputs -- fertilizers, containers, etc.). Multipliers for a region may be derived from an input-output model of the region's economy.

**IMPLAN** is a micro-computer-based input output modeling system and Social Accounting Matrix (SAM). With IMPLAN, one can estimate I-O models of up to 440 sectors for any region consisting of one or more counties. IMPLAN includes procedures for generating multipliers and estimating impacts by applying final demand changes to the model. The current version of the software is *IMPLAN Pro 2*.

**Direct effects** are the changes in economic activity during the first round of spending. **Secondary effects** are the changes in economic activity from subsequent rounds of re-spending. There are two types of secondary effects: **Indirect effects** are the changes in sales, income or employment within the region in backward-linked industries supplying goods and services to businesses. For example, the increased sales in input supply firms resulting from more nursery industry sales is an indirect effect. **Induced effects** are the increased sales within the region from household spending of the income earned in the direct and supporting industries. Employees in the direct and supporting industries spend the income they earn on housing, utilities, groceries, and other consumer goods and services. This generates sales, income and employment throughout the region's economy. **Total effects** are the sum of direct, indirect and induced effects.

**Multipliers** capture the total effects, both direct and secondary, in a given region, generally as a ratio of the total change in economic activity in the region relative to the direct change. Multipliers may be expressed as ratios of sales, income or employment, or as ratios of total income or employment changes relative to direct sales. Multipliers express the degree of interdependency between sectors in a region's economy and therefore vary considerably across regions and sectors. **Type I** multipliers include only direct and indirect effects. **Type II** multipliers also include induced effects. **Type SAM** multipliers used by IMPLAN additionally account for capital investments and transfer payments such as welfare and retirement income. A **sector-specific multiplier** gives the total changes to the economy associated with a unit change in output or employment in a given sector.

**Purchaser prices** are the prices paid by the final consumer of a good or service. **Producer prices** are the prices of goods at the factory or production point. For manufactured goods the purchaser price equals the producer price plus a retail margin, a wholesale margin, and a transportation margin. For services, the producer and purchaser prices are equivalent.

**Margins.** The retail, wholesale and transportation margins are the portions of the purchaser price accruing to the retailer, wholesaler, and grower, respectively. Only the retail margins of many goods purchased by consumers accrue to the local region, as the wholesaler, shipper, and manufacturer often lie outside the local area.

**Measures of economic activity.** **Sales or output** is the dollar volume of a good or service produced or sold. **Final Demand** is sales to final consumers, including households, governments, and exports. **Intermediate sales** are sales to other industrial sectors. **Income** is the money earned within the region from production and sales. Total income includes personal income (wage and salary income, including income of sole proprietor's profits and rents). **Jobs** or employment is a measure of the number of jobs required to produce a given volume of sales/production, usually expressed as full time equivalents, or as the total number including part time and seasonal positions. **Value Added** is the sum of total income and indirect business taxes. Value added is the most commonly used measure of the contribution of a region to the national economy, as it avoids double counting of intermediate sales and captures only the "value added" by the region to final products.

## Appendix B: Listing of Florida Hospitals, by County

Source: Florida Hospital Association

County	Hospital Name	City	Type	Number Beds	Fulltime Equivalent Employees
Alachua	North Florida Regional Medical Center	Gainesville	Acute Care	325	1,257.5
Alachua	Shands AGH	Gainesville	Acute Care	367	
Alachua	Shands at the University of Florida	Gainesville	Acute Care	660	6,545.3
Alachua	Shands Rehab Hospital	Gainesville	Rehabilitation	40	
Alachua	Shands Vista	Gainesville	Psychiatric	81	
Baker	Ed Fraser Memorial Hospital	Macclenny	Acute Care	25	122.1
Baker	Northeast Florida State Hospital	Macclenny	Psychiatric	1,138	1,071.0
Bay	Bay Medical Behavioral Health Center	Panama City	Psychiatric	90	
Bay	Bay Medical Center	Panama City	Acute Care	323	1,850.0
Bay	Gulf Coast Medical Center	Panama City	Acute Care	176	715.7
Bay	HealthSouth Emerald Coast Rehab Hospital	Panama City	Rehabilitation	75	135.3
Bay	Select Specialty Hospital-Panama City	Panama City	Acute Care/LTC	30	74.8
Bradford	Shands Starke	Starke	Acute Care	25	203.4
Brevard	Cape Canaveral Hospital	Cocoa Beach	Acute Care	150	891.7
Brevard	Circles of Care, Inc.	Melbourne	Psychiatric	52	153.4
Brevard	Devereux Florida Treatment Network	Viera	IRTF/Psychiatric	100	219.7
Brevard	HealthSouth Sea Pines Rehabilitation Hospital	Melbourne	Rehabilitation	90	148.2
Brevard	Holmes Regional Medical Center	Melbourne	Acute Care	514	3,381.4
Brevard	Palm Bay Community Hospital	Palm Bay	Acute Care	60	
Brevard	Parrish Medical Center	Titusville	Acute Care	210	892.6
Brevard	Wuesthoff Medical Center-Melbourne	Melbourne	Acute Care	115	472.1
Brevard	Wuesthoff Medical Center-Rockledge	Rockledge	Acute Care	291	1,142.3
Broward	Atlantic Shores Hospital	Ft. Lauderdale	Psychiatric	72	90.3
Broward	Broward Health-Broward General Medical Center	Ft. Lauderdale	Acute Care	716	2,819.2
Broward	Broward Health-Coral Springs Medical Center	Coral Springs	Acute Care	200	889.6
Broward	Broward Health-Imperial Point Medical Center	Ft. Lauderdale	Acute Care	204	648.4
Broward	Broward Health-North Broward Medical Center	Deerfield Beach	Acute Care	409	1,287.3
Broward	Cleveland Clinic Florida Weston	Weston	Acute Care	150	804.6
Broward	Florida Medical Center	Ft. Lauderdale	Acute Care	459	808.0
Broward	Ft. Lauderdale Hospital	Ft. Lauderdale	Psychiatric	100	160.4
Broward	HealthSouth Sunrise Rehabilitation Hospital	Sunrise	Rehabilitation	126	262.4
Broward	Hollywood Pavilion	Hollywood	Psychiatric	60	68.0
Broward	Holy Cross Hospital	Ft. Lauderdale	Acute Care	571	1,785.7
Broward	Kindred Hospital South Florida-Ft. Lauderdale	Ft. Lauderdale	Acute Care/LTC	70	150
Broward	Kindred Hospital South Florida-Hollywood	Hollywood	Acute Care/LTC	124	260.7
Broward	Memorial Hospital Miramar	Miramar	Acute Care	178	602.5
Broward	Memorial Hospital Pembroke	Pembroke Pines	Acute Care	301	823.8
Broward	Memorial Hospital West	Pembroke Pines	Acute Care	299	2,058.5
Broward	Memorial Regional Hospital	Hollywood	Acute Care	690	4,531.8
Broward	Memorial Regional Hospital South	Hollywood	Acute Care	324	
Broward	Northwest Medical Center	Margate	Acute Care	215	661.0
Broward	Plantation General Hospital	Plantation	Acute Care	264	553.3
Broward	South Florida State Hospital	Pembroke Pines	Psychiatric	350	412.0
Broward	St. Anthony's Rehabilitation Hospital	Lauderdale Lakes	Rehabilitation	26	45.0
Broward	University Hospital & Medical Center	Tamarac	Acute Care	257	618.9
Broward	University Pavilion Hospital	Tamarac	Psychiatric/Dept.	60	
Broward	Westside Regional Medical Center	Plantation	Acute Care	224	717.7
Calhoun	Calhoun-Liberty Hospital, Inc.	Blountstown	Acute Care	25	58.0
Charlotte	Charlotte Regional Medical Center	Punta Gorda	Acute Care	208	771.6
Charlotte	Fawcett Memorial Hospital, Inc.	Port Charlotte	Acute Care	238	629.3
Charlotte	Peace River Regional Medical Center	Port Charlotte	Acute Care	219	713.2
Citrus	Citrus Memorial Health System	Inverness	Acute Care	198	1,076.3
Citrus	Seven Rivers Regional Medical Center	Crystal River	Acute Care	128	440.5
Clay	Kindred Hospital North Florida	Green Cove Springs	Acute Care/LTC	80	172
Clay	Orange Park Medical Center	Orange Park	Acute Care	230	891.7
Collier	NCH Downtown Naples Hospital	Naples	Acute Care	420	2,815.7

County	Hospital Name	City	Type	Number Beds	Fulltime Equivalent Employees
Collier	NCH North Naples Hospital	Naples	Acute Care	261	
Collier	Physicians Regional Medical Center-Collier Boulevard	Naples	Acute Care	100	
Collier	Physicians Regional Medical Center-Pine Ridge	Naples	Acute Care	83	706.6
Collier	The Willough Healthcare System	Naples	Psychiatric	42	21.7
Columbia	Lake City Medical Center	Lake City	Acute Care	67	331.0
Columbia	Shands Lake Shore	Lake City	Acute Care	99	399.1
DeSoto	DeSoto Memorial Hospital, Inc	Arcadia	Acute Care	49	224.6
Duval	Baptist Medical Center	Jacksonville	Acute Care	579	4,402.9
Duval	Baptist Medical Center Beaches	Jacksonville Beach	Acute Care	146	755.2
Duval	Baptist Medical Center South	Jacksonville	Acute Care	120	
Duval	Brooks Rehabilitation Hospital	Jacksonville	Rehabilitation	143	490.1
Duval	Mayo Clinic Hospital	Jacksonville	Acute Care	214	1,608.9
Duval	Memorial Hospital Jacksonville	Jacksonville	Acute Care	353	1,410.2
Duval	Shands Jacksonville	Jacksonville	Acute Care	696	3,362.3
Duval	Specialty Hospital - Memorial Health	Jacksonville	Acute Care/LTC	107	230.6
Duval	St. Vincent's Medical Center	Jacksonville	Acute Care	528	2,832.3
Duval	Ten Broeck Hospital Jacksonville	Jacksonville	Psychiatric	99	158.6
Duval	Wekiva Springs Center for Women	Jacksonville	Psychiatric	20	84.0
Escambia	Baptist Hospital, Inc.	Pensacola	Acute Care	492	1,972.6
Escambia	Lakeview Center, Inc.	Pensacola	IRTF/Psychiatric	16	25.8
Escambia	Sacred Heart Hospital of Pensacola	Pensacola	Acute Care	458	2,099.1
Escambia	West Florida Hospital	Pensacola	Acute Care	531	1,021.1
Flagler	Florida Hospital Flagler	Palm Coast	Acute Care	99	489.8
Franklin	George E. Weems Memorial Hospital	Apalachicola	Acute Care	25	85.1
Gadsden	Florida State Hospital	Chattahoochee	Psychiatric	1,230	2,283.0
Hardee	Florida Hospital Wauchula	Wauchula	Acute Care	25	109.7
Hendry	Hendry Regional Medical Center	Clewiston	Acute Care	25	152.2
Hernando	Brooksville Regional Hospital	Brooksville	Acute Care	120	823.5
Hernando	HealthSouth Rehabilitation Hospital of Spring Hill	Brooksville	Rehabilitation	70	173.4
Hernando	Oak Hill Hospital	Brooksville	Acute Care	204	714.9
Hernando	Spring Hill Regional Hospital	Spring Hill	Acute Care	124	
Hernando	Springbrook Hospital	Brooksville	Psychiatric	66	114.9
Highlands	Florida Hospital Heartland Med. Ctr.	Sebring	Acute Care	159	867.6
Highlands	Florida Hospital Lake Placid	Lake Placid	Acute Care	50	
Highlands	Highlands Regional Medical Center	Sebring	Acute Care	126	376.9
Hillsborough	Brandon Regional Hospital	Brandon	Acute Care	367	1,344.9
Hillsborough	H. Lee Moffitt Cancer Ctr & Rsrch Inst	Tampa	Acute Care	162	2,122.1
Hillsborough	Kindred Hospital Bay Area-Tampa	Tampa	Acute Care/LTC	73	129.2
Hillsborough	Kindred Hospital Central Tampa	Tampa	Acute Care/LTC	102	195.9
Hillsborough	Memorial Hospital of Tampa	Tampa	Acute Care	180	453.8
Hillsborough	South Bay Hospital	Sun City Center	Acute Care	112	394.9
Hillsborough	South Florida Baptist Hospital	Plant City	Acute Care	147	598.4
Hillsborough	St. Joseph's Hospital, Inc.	Tampa	Acute Care	649	3,682.6
Hillsborough	St. Joseph's Women's Hospital	Tampa	Acute Care/Dept.	234	
Hillsborough	Tampa General Hospital	Tampa	Acute Care	877	4,949.3
Hillsborough	Town & Country Hospital	Tampa	Acute Care	201	348.3
Hillsborough	University Community Hospital-Carrollwood	Tampa	Acute Care	120	427.1
Hillsborough	University Community Hospital-Medical Center	Tampa	Acute Care	475	1,915.3
Holmes	Doctors Memorial Hospital	Bonifay	Acute Care	20	95.0
Indian River	HealthSouth Treasure Coast Rehab. Hospital	Vero Beach	Rehabilitation	90	156.7
Indian River	Indian River Medical Center	Vero Beach	Acute Care	335	1,283.4
Indian River	Sebastian River Medical Center	Sebastian	Acute Care	129	416.9
Jackson	Campbellton-Graceville Hospital	Graceville	Acute Care	25	75.2
Jackson	Jackson Hospital	Marianna	Acute Care	100	402.3
Lake	Florida Hospital Waterman	Tavares	Acute Care	204	1,034.3
Lake	Leesburg Regional Medical Center	Leesburg	Acute Care	309	1,507.6
Lake	LifeStream Behavioral Center	Leesburg	Psychiatric	40	85.5
Lake	South Lake Hospital	Clermont	Acute Care	104	712.8
Lee	Cape Coral Hospital	Cape Coral	Acute Care	291	1,150.8

County	Hospital Name	City	Type	Number Beds	Fulltime Equivalent Employees
Lee	Gulf Coast Hospital	Ft. Myers	Acute Care	120	367.2
Lee	HealthPark Medical Center	Ft. Myers	Acute Care	368	
Lee	Lee Memorial Hospital	Ft. Myers	Acute Care	427	3,055.8
Lee	Lehigh Regional Medical Center	Lehigh Acres	Acute Care	88	275.3
Lee	Southwest Florida Regional Medical Center	Ft. Myers	Acute Care	400	1,089.8
Leon	Capital Regional Medical Center	Tallahassee	Acute Care	198	638.3
Leon	Eastside Psychiatric Hospital	Tallahassee	Psychiatric	24	52.9
Leon	HealthSouth Rehabilitation Hospital of Tallahassee	Tallahassee	Rehabilitation	76	142.9
Leon	Select Specialty Hospital-Tallahassee	Tallahassee	Acute Care/LTC	29	27.1
Leon	Tallahassee Memorial Hospital	Tallahassee	Acute Care	770	2,785.1
Levy	Nature Coast Regional Health Network	Williston	Acute Care	40	60.7
Madison	Madison County Memorial Hospital	Madison	Acute Care	25	80.5
Manatee	Blake Medical Center	Bradenton	Acute Care	383	835.3
Manatee	Lakewood Ranch Medical Center	Bradenton	Acute Care	120	306.2
Manatee	Manatee Glens Hospital	Bradenton	Psychiatric	27	52.4
Manatee	Manatee Memorial Hospital	Bradenton	Acute Care	319	1,101.1
Marion	Kindred Hospital Ocala	Ocala	Acute Care/LTC	31	67.0
Marion	Marion-Citrus Mental Health Centers	Ocala	Psychiatric	15	16.9
Marion	Munroe Regional Medical Center	Ocala	Acute Care	421	2,101.2
Marion	Ocala Regional Medical Center	Ocala	Acute Care	200	1,027.2
Marion	Ten Broeck Hospital Ocala	Ocala	Psychiatric	42	2.2
Marion	West Marion Community Hospital	Ocala	Acute Care	70	
Martin	Martin Memorial Hospital South	Stuart	Acute Care	100	
Martin	Martin Memorial Medical Center	Stuart	Acute Care	244	1,999.1
Martin	SandyPines Hospital	Tequesta	Psychiatric	80	32.3
Miami-Dade	Aventura Hospital and Medical Center	Aventura	Acute Care	407	1,008.5
Miami-Dade	Baptist Hospital of Miami, Inc.	Miami	Acute Care	584	3,749.6
Miami-Dade	Bascom Palmer Eye Inst/Anne Bates Leach Eye Hosp	Miami	Acute Care	100	604.0
Miami-Dade	Coral Gables Hospital	Coral Gables	Acute Care	256	444.8
Miami-Dade	Doctors Hospital	Coral Gables	Acute Care	281	842.0
Miami-Dade	HealthSouth Rehab Hospital of Miami	Miami	Rehabilitation	60	159.8
Miami-Dade	Hialeah Hospital	Hialeah	Acute Care	378	652.1
Miami-Dade	Homestead Hospital	Homestead	Acute Care	120	769.1
Miami-Dade	Jackson Memorial Hospital	Miami	Acute Care	1,498	9,779.2
Miami-Dade	Jackson North Medical Center	North Miami Beach	Acute Care	382	
Miami-Dade	Jackson North Specialty & Diagnostic Center	Opalocka	Acute Care	60	
Miami-Dade	Jackson South Community Hospital	Miami	Acute Care	199	
Miami-Dade	Kendall Regional Medical Center	Miami	Acute Care	412	1,093.7
Miami-Dade	Kindred Hospital South Florida-Coral Gables	Coral Gables	Acute Care/LTC	53	156.1
Miami-Dade	Larkin Community Hospital	South Miami	Acute Care	132	459.2
Miami-Dade	Mercy Hospital	Miami	Acute Care	473	1,835.0
Miami-Dade	Metropolitan Hospital of Miami	Miami	Acute Care	146	1,179.8
Miami-Dade	Miami Children's Hospital	Miami	Acute Care	289	2,157.8
Miami-Dade	Miami Jewish Home & Hospital for the Aged	Miami	Acute Care	32	129.0
Miami-Dade	Mount Sinai Medical Center	Miami Beach	Acute Care	955	2,801.1
Miami-Dade	North Shore Medical Center	Miami	Acute Care	357	813.5
Miami-Dade	Palm Springs General Hospital	Hialeah	Acute Care	247	730.0
Miami-Dade	Palmetto General Hospital	Hialeah	Acute Care	360	1,279.2
Miami-Dade	Select Specialty Hospital-Miami	Miami	Acute Care/LTC	47	136.7
Miami-Dade	Sister Emmanuel Hospital	Miami	Acute Care/LTC	29	89.2
Miami-Dade	South Florida Evaluation and Treatment Center	Miami	Psychiatric	238	280
Miami-Dade	South Miami Hospital	Miami	Acute Care	445	2,090.4
Miami-Dade	Southern Winds Hospital	Hialeah	Psychiatric	72	
Miami-Dade	St. Catherine's Rehabilitation Hospital	North Miami	Rehabilitation	60	64.8
Miami-Dade	University of Miami Hospital	Miami	Acute Care	560	1,047.4
Miami-Dade	University of Miami Hospital/Clinics	Miami	Acute Care	40	1,011.3
Miami-Dade	West Gables Rehabilitation Hospital	Miami	Rehabilitation	60	160.4
Miami-Dade	Westchester General Hospital	Miami	Acute Care	125	610.3
Monroe	DePoo Hospital	Key West	Acute Care	49	

County	Hospital Name	City	Type	Number Beds	Fulltime Equivalent Employees
Monroe	Fishermen's Hospital	Marathon	Acute Care	58	142.9
Monroe	Lower Keys Medical Center	Key West	Acute Care	118	388.0
Monroe	Mariners Hospital	Tavernier	Acute Care	42	195.0
Nassau	Baptist Medical Center Nassau	Fernandina Beach	Acute Care	54	310.1
Okaloosa	Fort Walton Beach Medical Center	Ft. Walton Beach	Acute Care	257	825.4
Okaloosa	Gulf Coast Treatment Center	Ft. Walton Beach	Psychiatric	24	30.6
Okaloosa	North Okaloosa Medical Center	Crestview	Acute Care	110	464.6
Okaloosa	Twin Cities Hospital	Niceville	Acute Care	65	198.5
Okeechobee	Raulerson Hospital	Okeechobee	Acute Care	100	325.8
Orange	Arnold Palmer Hospital for Children	Orlando	Acute Care	443	2,919
Orange	Dr. P. Phillips Hospital	Orlando	Acute Care	161	1,061
Orange	Florida Hospital Apopka	Apopka	Acute Care	50	288
Orange	Florida Hospital East Orlando	Orlando	Acute Care	225	1,295
Orange	Florida Hospital Orlando	Orlando	Acute Care	896	5,155
Orange	Florida Hospital Winter Park	Winter Park	Acute Care	297	1,709
Orange	Health Central	Ocoee	Acute Care	171	983.0
Orange	La Amistad Residential Treatment Center	Maitland	IRTF/Psychiatric	40	75.7
Orange	Lakeside Behavioral Healthcare, Inc.	Orlando	Psychiatric	56	60.8
Orange	Orlando Regional Lucerne Hospital	Orlando	Acute Care	209	1,377
Orange	Orlando Regional Medical Center	Orlando	Acute Care	581	3,829
Orange	Select Specialty Hospital Orlando-South	Orlando	Acute Care/LTC	40	
Orange	Select Specialty Hospital-Orlando	Orlando	Acute Care/LTC	35	130.2
Orange	University Behavioral Center	Orlando	Psychiatric	104	47.0
Osceola	Florida Hospital Celebration Health	Celebration	Acute Care	112	644
Osceola	Florida Hospital Kissimmee	Kissimmee	Acute Care	83	478
Osceola	Osceola Regional Medical Center	Kissimmee	Acute Care	235	1,043.7
Osceola	St. Cloud Regional Medical Center	St. Cloud	Acute Care	84	348.8
Palm Beach	A.G. Holley State Hospital	Lantana	Specialty	100	175.9
Palm Beach	Bethesda Healthcare System	Boynton Beach	Acute Care	401	1,623.0
Palm Beach	Boca Raton Community Hospital	Boca Raton	Acute Care	400	2,065.4
Palm Beach	Columbia Hospital	West Palm Beach	Acute Care	250	522.4
Palm Beach	Delray Medical Center, Inc.	Delray Beach	Acute Care	350	1,186.7
Palm Beach	Fair Oaks Pavilion	Delray Beach	Psychiatric/Dept.	53	
Palm Beach	Glades General Hospital	Belle Glade	Acute Care	73	266.3
Palm Beach	Good Samaritan Medical Center	West Palm Beach	Acute Care	333	667.7
Palm Beach	JFK Medical Center	Atlantis	Acute Care	424	1,582.4
Palm Beach	Jupiter Medical Center	Jupiter	Acute Care	156	997.5
Palm Beach	Oakwood Center of the Palm Beaches, Inc.	West Palm Beach	Psychiatric	44	63.5
Palm Beach	Palm Beach Gardens Medical Ctr.	Palm Beach Gardens	Acute Care	199	666.4
Palm Beach	Palms West Hospital	Loxahatchee	Acute Care	175	646.4
Palm Beach	Pinecrest Rehab. Hospital at Delray	Delray Beach	Rehabilitation/Dept.	90	45.0
Palm Beach	St. Mary's Medical Center	West Palm Beach	Acute Care	463	1,404.0
Palm Beach	Wellington Regional Medical Center	Wellington	Acute Care	143	694.9
Palm Beach	West Boca Medical Center, Inc.	Boca Raton	Acute Care	185	685.7
Pasco	Community Hospital	New Port Richey	Acute Care	389	883.3
Pasco	Florida Hospital Zephyrhills	Zephyrhills	Acute Care	154	650.5
Pasco	Morton Plant North Bay Hospital	New Port Richey	Acute Care	122	456.4
Pasco	Pasco Regional Medical Center	Dade City	Acute Care	120	333.3
Pasco	Regional Medical Center Bayonet Point	Hudson	Acute Care	290	845.1
Pinellas	All Children's Hospital	St. Petersburg	Acute Care	216	1,844.2
Pinellas	Bayfront Medical Center	St. Petersburg	Acute Care	502	1,775.5
Pinellas	Edward White Hospital	St. Petersburg	Acute Care	167	257.6
Pinellas	HealthSouth Rehabilitation Hospital	Largo	Rehabilitation	70	173.7
Pinellas	Helen Ellis Memorial Hospital	Tarpon Springs	Acute Care	168	447.0
Pinellas	Kindred Hospital Bay Area-St. Petersburg	St. Petersburg	Acute Care/LTC	82	176.5
Pinellas	Largo Medical Center	Largo	Acute Care	256	706.6
Pinellas	Mease Hospital/Countryside	Safety Harbor	Acute Care	300	
Pinellas	Mease Hospital/Dunedin	Dunedin	Acute Care	143	1,755.4
Pinellas	Morton Plant Hospital	Clearwater	Acute Care	687	2,130.9

County	Hospital Name	City	Type	Number Beds	Fulltime Equivalent Employees
Pinellas	Northside Hospital and Heart Institute	St. Petersburg	Acute Care	288	647.8
Pinellas	Palms of Pasadena Hospital	St. Petersburg	Acute Care	307	545.1
Pinellas	St. Anthony's Hospital	St. Petersburg	Acute Care	395	1,014.1
Pinellas	St. Petersburg General Hospital	St. Petersburg	Acute Care	219	521.3
Pinellas	Sun Coast Hospital	Largo	Acute Care/Dept.	200	450.2
Pinellas	Windmoor Healthcare of Clearwater	Clearwater	Psychiatric	100	156.2
Polk	Bartow Regional Medical Center	Bartow	Acute Care	72	321.6
Polk	Heart of Florida Regional Medical Center	Davenport	Acute Care	142	692.3
Polk	Lake Wales Medical Centers	Lake Wales	Acute Care	154	355.6
Polk	Lakeland Regional Medical Center	Lakeland	Acute Care	851	3,661.7
Polk	Regency Medical Center	Winter Haven	Acute Care	61	
Polk	Winter Haven Hospital	Winter Haven	Acute Care	466	2,120.4
Putnam	Putnam Community Medical Center	Palatka	Acute Care	141	448.1
Santa Rosa	Baptist Hospital, Inc. d/b/a/ Gulf Breeze Hospital	Gulf Breeze	Acute Care	65	
Santa Rosa	Jay Hospital	Jay	Acute Care	55	120.6
Santa Rosa	Santa Rosa Medical Center	Milton	Acute Care	129	327.1
Santa Rosa	West Florida Community Care Ctr.	Milton	Psychiatric	100	92.5
Sarasota	Bayside Center for Behavioral Health	Sarasota	Psychiatric/Dept.	86	
Sarasota	Doctors Hospital of Sarasota	Sarasota	Acute Care	168	429.2
Sarasota	Englewood Community Hospital, Inc.	Englewood	Acute Care	100	269.8
Sarasota	HealthSouth Rehab Hospital of Sarasota	Sarasota	Rehabilitation	76	182.6
Sarasota	HealthSouth RidgeLake Hospital	Sarasota	Acute Care/LTC	40	96.3
Sarasota	Sarasota Memorial Hospital	Sarasota	Acute Care	720	3,069.1
Sarasota	Venice Regional Medical Center	Venice	Acute Care	312	741.4
Seminole	Central Florida Regional Hospital	Sanford	Acute Care	226	708.7
Seminole	Florida Hospital Altamonte	Altamonte Springs	Acute Care	341	1,962
Seminole	Orlando Regional South Seminole Hospital	Longwood	Acute Care	206	1,358
St. Johns	Flagler Hospital, Inc.	St. Augustine	Acute Care	316	1,325.3
St. Lucie	Lawnwood Regional Medical Ctr. & Heart Inst.	Ft. Pierce	Acute Care	341	931.4
St. Lucie	Port St. Lucie Hospital	Port St. Lucie	Psychiatric	75	98.9
St. Lucie	St. Lucie Medical Center	Port St. Lucie	Acute Care	194	643.4
Sumter	The Villages Regional Hospital	The Villages	Acute Care	192	408.6
Suwannee	Shands Live Oak	Live Oak	Acute Care	15	145.8
Taylor	Doctors' Memorial Hospital, Inc.	Perry	Acute Care	48	226.1
Union	Lake Butler Hospital/Hand Surgery Center	Lake Butler	Acute Care	25	70.7
Union	Reception and Medical Center	Lake Butler	Specialty	153	250.0
Volusia	Bert Fish Medical Center	New Smyrna Beach	Acute Care	112	621.8
Volusia	Florida Hospital DeLand	DeLand	Acute Care	156	704.9
Volusia	Florida Hospital Fish Memorial	Orange City	Acute Care	139	742.4
Volusia	Florida Hospital Memorial Medical Center	Ormond Beach	Acute Care	205	1,030.4
Volusia	Florida Hospital Oceanside	Ormond Beach	Acute Care	119	
Volusia	Halifax Behavioral Services	Daytona Beach	Psychiatric	30	
Volusia	Halifax Health - Medical Center of Port Orange	Port Orange	Acute Care	80	
Volusia	Halifax Health Medical Center	Daytona Beach	Acute Care	654	3,472.0
Walton	Healthmark Regional Medical Center	DeFuniak Springs	Acute Care	50	138.1
Walton	Sacred Heart Hospital on the Emerald Coast	Destin	Acute Care	58	322.3
Washington	Northwest Florida Community Hospital	Chipley	Acute Care	59	143.8

Note: some employment figures (shown in red type) were estimated in proportion to total number of beds for parent company reporting unit, for purposes of county and regional analysis.

**Appendix C: Florida Hospital Industry Purchases**  
 Sectors shown represent at least 0.01 percent of total purchases

Industry Sector / Institution	Share of Total Purchases	Share of Purchases within State
<b>Commodity Purchases</b>		
Real estate establishments	11.14%	70.00%
Management of companies and enterprises	2.60%	80.00%
Medical and diagnostic labs and outpatient and oth	2.44%	89.98%
Pharmaceutical preparation manufacturing	1.97%	17.70%
Insurance carriers	1.78%	66.08%
Veterinary services	1.74%	95.00%
In-vitro diagnostic substance manufacturing	1.71%	19.53%
Wholesale trade businesses	1.51%	90.81%
Electromedical and electrotherapeutic apparatus manuf.	1.26%	74.19%
Employment services	1.24%	80.00%
Electric power generation- transmission- and distribution	1.15%	71.63%
Sanitary paper product manufacturing	0.94%	0.06%
Surgical appliance and supplies manufacturing	0.91%	57.02%
Securities- commodity contracts- investments- and	0.88%	68.69%
Office administrative services	0.81%	80.00%
Animal (except poultry) slaughtering- rendering- a	0.72%	17.04%
US Postal Service	0.68%	69.66%
Other plastics product manufacturing	0.65%	25.72%
Surgical and medical instrument- laboratory and me	0.61%	76.20%
Management- scientific- and technical consulting s	0.60%	80.00%
Industrial gas manufacturing	0.54%	40.81%
Telecommunications	0.52%	56.80%
Services to buildings and dwellings	0.50%	80.00%
Legal services	0.42%	90.00%
Advertising and related services	0.40%	79.61%
Food services and drinking places	0.39%	90.00%
Commercial and industrial machinery and equipment	0.37%	80.00%
Accounting- tax preparation- bookkeeping- and payroll services	0.35%	90.00%
Automotive repair and maintenance- except car wash	0.35%	90.00%
Transport by truck	0.33%	76.26%
Ice cream and frozen dessert manufacturing	0.30%	42.84%
Seafood product preparation and packaging	0.26%	59.63%
Poultry processing	0.23%	15.95%
Other computer related services	0.22%	78.48%
Automotive equipment rental and leasing	0.22%	90.00%
Other basic organic chemical manufacturing	0.22%	42.65%
Maintenance & repair construct of nonresident structures	0.21%	100.00%
Cheese manufacturing	0.21%	6.07%
Fruit and vegetable canning- pickling- and drying	0.21%	4.26%
Soft drink and ice manufacturing	0.19%	16.83%

Industry Sector / Institution	Share of Total Purchases	Share of Purchases within State
Curtain and linen mills	0.19%	0.91%
Computer systems design services	0.18%	69.86%
Investigation and security services	0.16%	80.00%
Electronic and precision equipment repair and main	0.16%	90.00%
Private hospitals	0.15%	85.18%
Petroleum refineries	0.14%	3.04%
Environmental and other technical consulting services	0.13%	80.00%
Dry-cleaning and laundry services	0.13%	90.00%
Commercial and industrial machinery and equipment	0.13%	80.00%
Coffee and tea manufacturing	0.12%	67.91%
Other rubber product manufacturing	0.12%	0.05%
Monetary authorities and depository credit intermediaries	0.12%	65.27%
All other miscellaneous professional- scientific-	0.10%	80.00%
Business support services	0.10%	80.00%
Other pressed and blown glass and glassware manufacturing	0.10%	29.70%
Warehousing and storage	0.10%	76.26%
Personal and household goods repair and maintenance	0.10%	90.00%
Printing	0.09%	25.30%
All other basic inorganic chemical manufacturing	0.09%	34.13%
Scientific research and development services	0.09%	42.43%
Water- sewage and other treatment and delivery sys	0.08%	80.94%
Other support services	0.08%	80.00%
Fluid milk and butter manufacturing	0.07%	58.42%
Couriers and messengers	0.07%	70.01%
Paper mills	0.07%	0.02%
Coated and laminated paper- packaging paper and pl	0.06%	0.02%
Alkalies and chlorine manufacturing	0.06%	58.95%
Retail Stores - Motor vehicle and parts	0.05%	95.00%
All other food manufacturing	0.05%	32.86%
Transport by rail	0.05%	91.62%
Paperboard container manufacturing	0.05%	0.03%
Seasoning and dressing manufacturing	0.05%	57.48%
Transit and ground passenger transportation	0.05%	79.47%
Frozen food manufacturing	0.04%	3.95%
Travel arrangement and reservation services	0.04%	70.01%
Waste management and remediation services	0.04%	80.00%
Soap and cleaning compound manufacturing	0.04%	28.94%
Petrochemical manufacturing	0.04%	26.37%
Facilities support services	0.04%	80.00%
Cable and other subscription programming	0.04%	56.52%
Civic- social- professional- and similar organizations	0.04%	66.90%
Retail Stores - Food and beverage	0.04%	94.05%
Data processing- hosting- ISP- web search portals	0.04%	30.41%

Industry Sector / Institution	Share of Total Purchases	Share of Purchases within State
Retail Stores - General merchandise	0.04%	95.00%
Private junior colleges, colleges and universities	0.03%	69.27%
All other chemical product and preparation manuf.	0.03%	33.55%
Transport by air	0.03%	46.17%
Semiconductor and related device manufacturing	0.03%	61.46%
Nondepository credit intermediation and related ac	0.03%	68.69%
Retail Stores - Furniture and home furnishings	0.03%	95.00%
Scenic and sightseeing transportation and support	0.03%	70.01%
Natural gas distribution	0.03%	35.61%
Retail Nonstores - Direct and electronic sales	0.02%	82.39%
Magnetic and optical recording media manufacturing	0.02%	0.62%
Synthetic rubber manufacturing	0.02%	0.07%
Retail Stores - Building material and garden supply stores	0.02%	95.00%
Architectural- engineering- and related services	0.02%	90.00%
Internet publishing and broadcasting	0.02%	26.24%
Other fabricated metal manufacturing	0.02%	0.00%
Air conditioning- refrigeration- and warm air heat	0.02%	0.00%
Crown and closure manufacturing and metal stamping	0.02%	2.15%
Paperboard Mills	0.02%	0.02%
Showcase- partition- shelving- and locker manufacturing	0.02%	36.76%
All other textile product mills	0.02%	1.91%
Retail Stores - Health and personal care	0.02%	95.00%
Independent artists- writers- and performers	0.02%	79.78%
General and consumer goods rental except video tap	0.02%	80.00%
Synthetic dye and pigment manufacturing	0.02%	15.36%
Urethane and other foam product (except polystyrene	0.02%	33.52%
Retail Stores - Clothing and clothing accessories	0.02%	95.00%
Car washes	0.02%	90.00%
Retail Stores - Electronics and appliances	0.02%	95.00%
Retail Stores – Miscellaneous	0.01%	95.00%
Motor vehicle parts manufacturing	0.01%	9.06%
Lighting fixture manufacturing	0.01%	0.09%
Retail Stores - Gasoline stations	0.01%	75.39%
Hotels and motels- including casino hotels	0.01%	80.00%
Stationery product manufacturing	0.01%	0.07%
Other concrete product manufacturing	0.01%	0.72%
Cutlery- utensil- pot- and pan manufacturing	0.01%	6.17%
Retail Stores - Sporting goods- hobby- book and mu	0.01%	90.61%
Other state and local government enterprises	0.01%	77.39%
All other miscellaneous wood product manufacturing	0.01%	20.70%
Other electronic component manufacturing	0.01%	29.06%
Broadwoven fabric mills	0.01%	1.99%
Transport by water	0.01%	100.00%

Industry Sector / Institution	Share of Total Purchases	Share of Purchases within State
Womens and girls cut and sew apparel manufacturing	0.01%	9.78%
Office supplies (except paper) manufacturing	0.01%	7.24%
Other information services	0.01%	26.39%
Pottery- ceramics- and plumbing fixture manufacturing	0.01%	0.02%
Laminated plastics plate- sheet (except packaging)	0.01%	46.90%
Periodical publishers	0.01%	29.23%
<b>Value Added</b>		
Employee Compensation	50.04%	100.00%
Proprietary Income	0.36%	100.00%
Other Property Income	2.48%	100.00%
Indirect Business Taxes	0.63%	100.00%
Total Value Added	53.51%	100.00%

Source: *IMPLAN Professional* data for Florida (MIG, Inc., 2008).