

Industry Overview

The nine-county Metro Denver and Northern Colorado region¹ is the healthcare and wellness center of the Rocky Mountain West. The vibrant healthcare and wellness industry has one of the most active and fittest populations in the nation. In fact, the region has one of the lowest rates of adult obesity, a high rate of physical activity, and low rates of diabetes and heart disease. Metro Denver is the third-fittest metropolitan area in the nation and Fort Collins and Boulder are among the nation's top metro areas for residents' overall health and well-being. Outdoor recreation is a fundamental component to the region's healthy, active lifestyle. Metro Denver boasts the nation's largest public parks system, 11 world-class ski resorts within 100 miles, and more than 850 miles of paved off-road trails.



The healthcare and wellness cluster includes a dynamic and growing group of companies that provide preventive, curative, and rehabilitative services offered by healthcare providers, medical and specialty hospitals, kidney dialysis centers, nutrition and weight loss facilities, fitness centers, medical spas and massage facilities, public health and education, and other healthcare and wellness organizations. Extending beyond healthcare delivery, the cluster represents a continuum of businesses ranging from treating disease to a multidimensional and holistic approach that focuses on complete physical and mental health, social well-being, and disease prevention. The region's healthcare and wellness industry is resilient to economic cycles, with employment increasing every year since 2004. With an employment base of 214,430 workers in 19,760 companies, the healthcare and wellness cluster is the region's largest cluster in terms of employment. Healthcare and wellness companies employed 9.6 percent of the region's total employment base in 2016 and total payroll in the industry exceeded \$11.4 billion.

The region's internationally renowned clinical systems and top-rated research institutions support the thriving healthcare and wellness cluster. The cluster is anchored by the 578-acre Fitzsimons campus, which includes the Anschutz Medical Campus and the Fitzsimons Innovation Campus. The project will be the largest medical-related redevelopment in the nation and the world's only complete new research, education, and patient care complex. The campus is home to the schools and colleges of Medicine, Nursing, Dental Medicine, Pharmacy, and Public Health. With two world-class research hospitals—the University of Colorado Hospital (UCH) and Children's Hospital Colorado—the campus will total 18 million square feet and employ more than 44,000 people at full buildout. The Campus is also home to the Anschutz Center for Health and Wellness, which will become the nation's go-to-source of information and programs to reverse the upward trend of childhood and adult obesity. The Anschutz Medical Campus is the largest academic health center from Chicago to the West Coast and has a \$5.4 billion annual economic impact to the state. In addition, several hospitals and healthcare systems in the region are undergoing major renovations and expansions to support the growing healthcare hub. The region is also a leader in the integration of IT-software and healthcare and wellness, developing wearables and apps to track well-being.

Demand for healthcare and wellness services and workers will continue to increase from the state's growing and aging population, the changing health insurance landscape, and ongoing treatment for chronic conditions, among others. These trends will also drive further collaboration and cooperation among various healthcare and wellness facilities across the region for specialized services, research, workforce, and facilities. By 2040, Colorado's population ages 65 and older is projected to double to 1.5 million. Concurrently, life expectancy in Colorado has increased from 77.2 years to 80.4 years since 1990, the third-highest growth rate in the nation. This demographic shift toward an older population will generate economic activity based on increased demand for health services. Further, the expansion of the insured population in the state will continue to increase the need for healthcare providers and infrastructure support.

¹ The nine-county region is comprised of two principal areas, Metro Denver and Northern Colorado. Metro Denver consists of Adams, Arapahoe, Boulder, Broomfield, Denver, Douglas, and Jefferson counties. Northern Colorado consists of Larimer and Weld counties.

Healthcare and Wellness Economic Profile

The healthcare and wellness cluster includes the offices of physicians, dentists, chiropractors, optometrists, mental health practitioners, physical and speech therapists, podiatrists, and other health practitioners. The cluster includes hospitals ranging from general medical, surgical, and psychiatric to substance abuse and specialty care. The cluster also includes centers focused on family planning, outpatient mental health and substance abuse, kidney dialysis, diagnostic imaging, and emergency care. Companies focused on nursing care, assisted living, and long-term care and businesses that provide services for individuals, families, and the elderly are also included.

The cluster encompasses home health and recreation equipment rental, fitness and recreation facilities, diet and weight reducing services, and massage and yoga services. Companies that manufacture ophthalmic goods, sports and athletic equipment, and outerwear and retailers engaged in vitamins and nutrition supplements are also a part of healthcare and wellness. The cluster includes government agencies engaged in the planning, administration, and coordination of public health programs and services. The healthcare and wellness cluster consists of 53, six-digit North American Industry Classification System (NAICS) codes.

With direct employment of 214,430 healthcare and wellness workers, the nine-county region ranked 13th out of the 50 largest metro areas in 2016. The region ranked 30th for healthcare and wellness employment concentration.² Seventy percent of Colorado's healthcare and wellness cluster employees worked in the region.

Healthcare and Wellness Employment and Company Profile, 2016

	Nine-County Region	United States
Direct employment, 2016	214,430	17,855,000
Number of direct companies, 2016	19,760	1,392,110
One-year direct employment growth, 2015-2016	5.4%	3.1%
Five-year direct employment growth, 2011-2016	22.8%	11.1%
Avg. annual direct employment growth, 2011-2016	4.2%	2.1%
Direct employment concentration	9.6%	10.4%

Sources: Dun & Bradstreet, Inc. Marketplace database, July-Sept. 2010; Market Analysis Profile, 2011-2016; Development Research Partners.

² Direct employment is the number of employees in the industry cluster in a region. No multiplier effects are included. Direct employment is estimated and ranked for the 50 largest metropolitan statistical areas (MSAs). Employment concentration is the direct cluster employment in a region expressed as a percent of total employment in all industries in the same region. Employment concentration is calculated and ranked for the 50 largest MSAs.

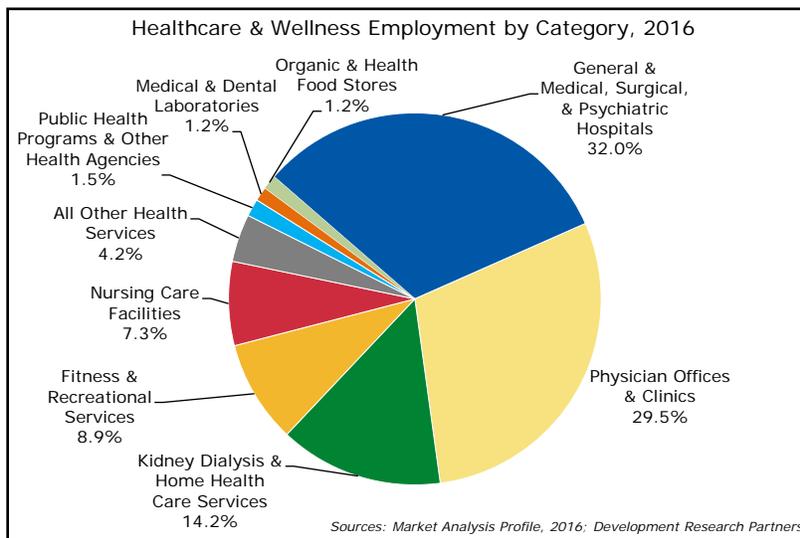
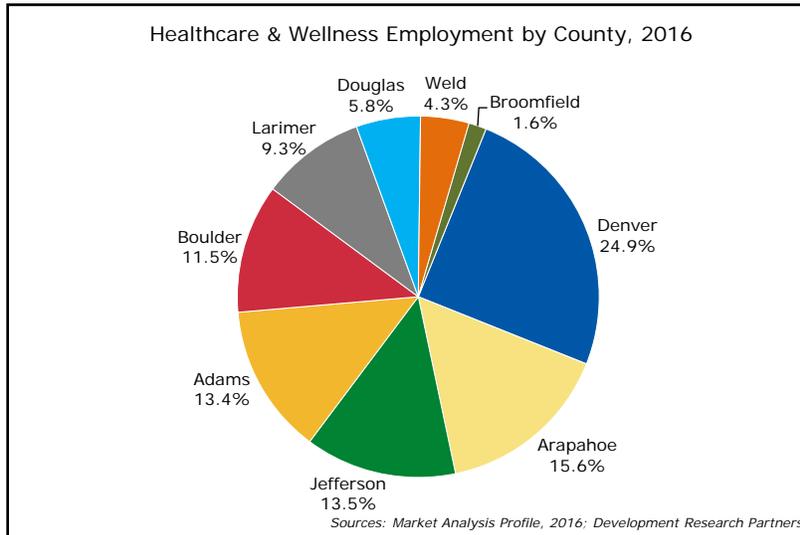
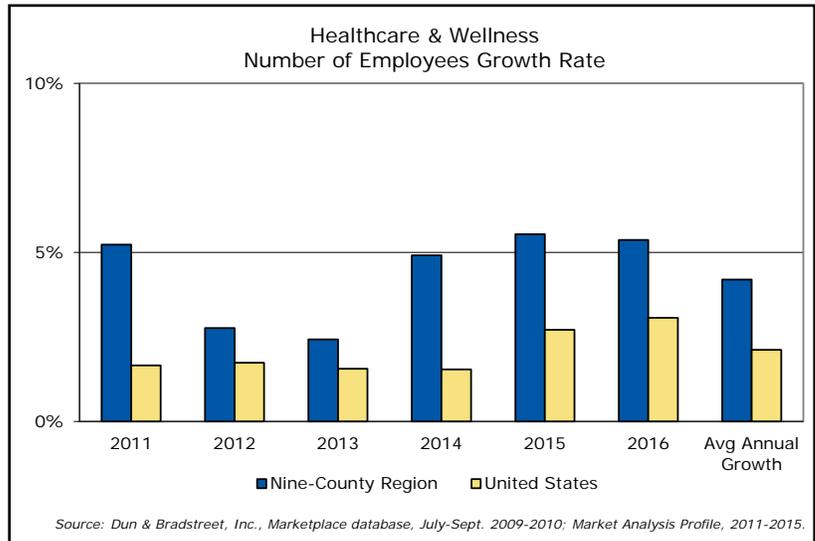
HEALTHCARE AND WELLNESS:

Metro Denver and Northern Colorado Industry Cluster Profile

Healthcare and Wellness Employment

The nine-county region's healthcare and wellness employment (214,430 workers) rose 5.4 percent in 2016, compared with the previous year's level, adding nearly 10,920 new jobs during the same period. National employment levels also grew over-the-year, rising 3.1 percent. About 1.2 percent of the nation's healthcare and wellness employment is located in the region. Between 2011 and 2016, the region's healthcare and wellness employment rose 22.8 percent, compared with 11.1 percent growth at the national level.

About 19,760 healthcare and wellness companies operated in the nine-county region in 2016. Approximately 88 percent of the region's healthcare and wellness companies employed fewer than 10 people, while 0.4 percent employed 250 or more.



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Major Healthcare Companies

- American Medical Response
www.amr.net
- Comfort Dental
www.comfortdental.com
- DaVita Inc.
www.davita.com
- HealthGrades, Inc.
www.healthgrades.com
- HSS Inc.
www.hss-us.com
- InnovAge
www.myinnovage.org
- Kindred Healthcare, Inc.
www.kindredhealthcare.com
- Life Care Centers of America
www.lcca.com
- Quest Diagnostics
www.questdiagnostics.com
- Rocky Mountain Poison & Drug Center
www.rmpdc.org

Major Wellness Companies

- 24 Hour Fitness
www.24hourfitness.com
- CorePower Yoga
www.corepoweryoga.com
- Gaiam, Inc.
www.gaiam.com
- Massage Envy
www.massageenvy.com
- Natural Grocers by Vitamin Cottage
www.naturalgrocers.com
- SlimGenics, LLC
www.slimgenics.com
- United Natural Foods, Inc.
www.unfi.com
- Wellbridge, Inc.
www.wellbridge.com

Major Healthcare and Wellness Foundations and Community-Based Organizations

- Anschutz Family Foundation
www.anschutzfamilyfoundation.org
- Arapahoe House
www.arapahoehouse.org
- Aurora Mental Health Center
www.aumhc.org
- Belle Bonfils Memorial Blood Center
www.bonfils.org
- Caring for Colorado Foundation
www.caringforcolorado.org
- Catholic Health Initiatives
www.catholichealthinit.org
- Children's Hospital Colorado Foundation
www.childrenscoloradofoundation.org
- Clinica Family Health Services
www.clinica.org
- Colorado Behavioral Healthcare Council
www.cbhc.org
- Colorado Community Health Network
www.cchn.org
- The Colorado Health Foundation
www.coloradohealth.org
- The Colorado Trust
www.coloradotrust.org
- Colorado Visiting Nurse Association
www.vnacolorado.org
- Community First Foundation
www.communityfirstfoundation.org
- The Denver Health Foundation
www.denverhealthfoundation.org
- The Denver Hospice
www.thedenverhospice.org
- El Pomar Foundation
www.elpomar.org
- Helen K. & Arthur E. Johnson Foundation
www.johnsonfoundation.org
- Kenneth King Foundation
www.kennethkingfoundation.org
- Jefferson Center for Mental Health
www.jeffersonmentalhealth.org
- Jewish Family Service of Colorado
www.jewishfamilyservice.org
- LiveWell Colorado
www.livewellcolorado.org
- Mental Health Center of Denver
www.mhcd.org
- Mental Health Partners
www.mhpcolorado.org
- Naturally Boulder
www.naturallyboulder.org
- North Colorado Health Alliance
www.northcoloradohealthalliance.org
- Rose Community Foundation
www.rcfdenver.org
- Western Dairy Association
www.westerndairyassociation.org

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Major Healthcare and Wellness Government and Research Facilities

- CO Department of Agriculture
www.colorado.gov/ag
- CO Department of Human Services
www.colorado.gov/CDHS
- CO Department of Public Health & Environment
www.colorado.gov/cdphe
- Tri-County Health Department
www.tchd.org
- University of CO Anschutz Medical Campus
www.ucdenver.edu
- U.S. Dept. of Agriculture
www.usda.gov
- U.S. Dept. of Health & Human Services Health Resources & Services Admin.
www.hrsa.gov
- U.S. Dept. of Veterans Affairs
www.va.gov

Nine-County Region Major Health Systems and Facilities

The nine-county region is home to major health systems and facilities that provide quality care to its residents. The region's major health systems and facilities are highlighted below and their corresponding projects and developments that were announced in 2016.

Anschutz Medical Campus and Fitzsimons Innovation Campus

The 578-acre Fitzsimons campus includes the [Anschutz Medical Campus](#) and the [Fitzsimons Innovation Campus](#). The project will be the largest medical-related redevelopment in the nation along with the world's only complete new research, education, and patient care complex.

- The U.S. Department of Veterans Affairs (VA) medical facility is 78 percent complete and on-track for a 2018 completion. The U.S. Army Corps of Engineers was awarded a \$571 million contract to complete the 1.2 million-square-foot medical center. When completed, the VA will employ about 2,100 people and will serve thousands of veterans. The facility will have 306,000 square feet of diagnostic and treatment space, 260,000 square feet of inpatient space, and 302,000 square feet of clinic space.
- The College of Nursing began a new project called the Healthcare Partners at Belleview Point. The health clinic will operate with nurse practitioners and will provide annual physicals, blood work, vaccines, and behavioral health services.
- The Barbara Davis Center for Childhood Diabetes is leading trials on the use of an artificial pancreas that holds potential to be a big breakthrough for the treatment of type 1 diabetes. The Center is testing the viability of the device that monitors glucose continually and could provide automatic insulin injections.
- The Center for Global Health was re-designated as the only maternal and child health collaborating center in North America by the World Health Organization. The designation boosts the Centers' prestige and will likely increase the number of grants the facility receives.

Banner Health

Banner Health is a premier health system in Northern Colorado, providing services to the cities of Berthoud, Eaton, Fort Collins, Greeley, Johnstown, Loveland, and Windsor. Two major health centers—the North Colorado Medical Center (NCMC) and the McKee Medical Center—have serviced the region for a combined 130 years. NCMC in Greeley is rated nationally among the top 1 percent of hospitals for clinical quality. The McKee Medical Center is an acute-care hospital serving the Loveland community. www.bannerhealth.com

- McKee Medical Center began offering three-dimensional, full-field digital breast mammography and tomosynthesis, becoming the second Banner Health facility in Northern Colorado to use the technology. The new imaging technology detects smaller cancers, as well as up to 60 percent more invasive cancers than conventional digital mammography.

Boulder Community Health

Boulder Community Health (BCH) is a community owned-and-operated health system dedicated to providing local access to high quality medical care to people and businesses in Boulder and the City and County of Broomfield. BCH provides clinical excellence in heart care, neurosurgery, stroke care, orthopedics, and cancer care. www.bch.org



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- A 76,000-square-foot medical building is planned next to BCH's Foothills Hospital Campus. The building will house units for behavioral health, in-patient rehabilitation and neurology, and electroconvulsive therapy.

Centura Health

Centura Health connects Coloradans to affordable, world-class care through an integrated network of healthcare staff and physician partners. Facilities in the nine-county region include Avista Adventist, Castle Rock Adventist, Littleton Adventist, Longmont United Hospital (LUH), OrthoColorado Hospital, Parker Adventist, Porter Adventist, St. Anthony, St. Anthony North Health Campus, and numerous urgent care, neighborhood health centers, surgery centers, and diagnostic imaging centers, among others. www.centura.org

- The new Centura Health Firestone Neighborhood Health Center opened, which promotes collaboration between different specialties, prevention, patient education, and easy access to the key components of optimal health. The center has two Centura Health Physician Group practices offering primary care services.
- A new emergency and urgent care center at the Indian Peaks Medical Center building opened in Frederick. The new center will be equipped with digital X-ray, CT scan, ultrasound, and other equipment.
- Plans for a 44,000-square-foot neighborhood health center in Littleton are underway. The center will provide primary care and urgent care services, and will be Centura's third neighborhood health center in Jefferson County.
- A new Centura Health Emergency and Urgent Care Center opened near the Centura Golden Neighborhood Health Center. The facility has 10 exam rooms, a trauma room, laboratory, digital audiology room, bariatrics room, CT scan room, medication prep area, and a drive-up emergency entrance.

Children's Hospital Colorado

Children's Hospital Colorado (CHC), located on the Anschutz Medical Campus, is the region's premier hospital for children. CHC provides care to more children than any hospital in the surrounding states through its network of over 3,000 pediatric specialists and more than 400 outreach clinics. www.childrenscolorado.org

- A new Center for Innovation opened that will transfer ideas from its staff and research into commercial products. The Center will allow hospital associates to submit ideas through a portal, where a team of healthcare professionals, venture development specialists, and patent attorneys will assess the proposals to then commercialize the products.
- CHC is one of six children-focused health systems that signed an agreement to form the Sanford Children's Genomic Medicine Consortium. The health systems will attempt to advance the care of acute pediatric diseases through the further use of personalized and genomic medicine.
- Englewood-based Flight For Life Colorado and CHC will launch a new critical care helicopter in 2017 to transport and care for small children. Supplied by Englewood-based Air Methods Corp., the Airbus H130 T2 helicopter will have more interior space for an incubator and will be staffed by teams trained in neonates and children. The Airbus will transport patients within a 120-mile radius to all of CHC's facilities in the region.

Craig Hospital

Craig Hospital in Denver is a world-renowned center for specialty rehabilitation and research for people with spinal cord injury (SCI) and traumatic brain injuries (TBI). Craig is a national center of excellence and has treated nearly 30,000 patients with SCI—more than any other single center in the world—and TBI since 1956. www.craighospital.org

- A \$90 million renovation and expansion project was completed, which included a fourth-floor addition to the hospital's west building and added a \$3 million fitness facility designed specifically for partially paralyzed individuals. The expansion added 88,000 square feet, and allowed for a redesign of the rooms on each floor including a heavy-duty lift that can carry immobile patients. The Peak Center now includes a large pool, an underwater treadmill, and expanded training areas.

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Denver Health

Denver Health is a comprehensive, integrated organization providing level one care for all and is Colorado's primary safety net institution. Denver Health is one of four Level I Trauma Centers in Colorado and one of the primary teaching hospitals in Denver. Twenty-five percent of all Denver residents, or approximately 150,000 individuals, receive their healthcare at Denver Health. www.denverhealth.org

HCA-HealthONE

HCA-HealthONE is one of the region's largest hospital systems, which includes eight hospitals, six stand-alone emergency departments, numerous ambulatory surgery centers, occupational medicine clinics, physician practices, and imaging centers. Major facilities in the region include the Medical Center of Aurora, North Suburban Medical Center, Presbyterian/St. Luke's, Rose Medical Center, Sky Ridge Medical Center, Spalding Rehabilitation Center, and Swedish Medical Center. HCA-HealthONE is home to AIRLIFE-DENVER, which provides critical care air and ground transportation across a 10-state region. www.healthonecares.com

- Sky Ridge Medical Center opened a dedicated pediatric emergency room. The 11-bed facility is staffed 24/7 with pediatric-specialist doctors and nurses, and emergency medical technicians. The department will house a suite of pediatric specialists including orthopedists, surgeons, and gastroenterologists.
- The Medical Center of Aurora opened a 20-bed inpatient adolescent behavioral health unit to treat children between the ages of 12 and 17 years old. The new facility will treat children for an average of two weeks before going to an intensive outpatient program and will help with the limited number of overnight beds in Metro Denver.

Kaiser Permanente Colorado

Kaiser Permanente provides comprehensive healthcare services to over 600,000 members through a network of 25 medical offices and affiliated hospitals and physicians throughout the region. www.kaiserpermanente.org

- A second medical office building in Fort Collins will open in January 2017. The 3,000-square-foot Kaiser Permanente Spring Creek office will offer primary care, laboratory, and pharmacy services.
- Plans are underway to build a new health center at Catalyst HTI, Denver's new health-tech innovation campus in the River North neighborhood. The facility will serve as a pilot site where new clinical innovations and processes will be tested, in addition to providing primary care services. The facility is slated to open in early 2018.

National Jewish Health

National Jewish Health is a worldwide leader in treating patients with respiratory, cardiac, immune, and related disorders. Founded in 1899 as a nonprofit hospital, National Jewish Health remains the only facility in the world dedicated exclusively to these disorders. Roughly 30 percent of National Jewish's patients come from out-of-state to receive pulmonology care. www.nationaljewish.org

SCL Health System

SCL Health is a faith-based, nonprofit healthcare organization dedicated to improving the health of the people and communities. SCL Health provides care through five hospitals, ambulatory service centers, home healthcare, hospice, mental healthcare, and safety-net services. Major healthcare facilities in the region include Good Samaritan Medical Center, Lutheran Medical Center, Platte Valley Medical Center, Saint Joseph Hospital, and SCL Health Community Hospital. www.sclhealthsystem.org

- Construction continued on the SCL Health Community Hospital-Northglenn, a 60,000-square-foot community hospital and medical office facility. The facility will include inpatient beds, laboratory and imaging services, and surgical amenities. The project is slated for completion in early 2017.
- A new microhospital opened in Jefferson County in the spring of 2016. Microhospitals range from 15,000 to 50,000 square feet, with the new hospital spanning just over 37,000 square feet. The facility provides many of the services of a large hospital, but on a smaller scale.

University of Colorado Health

University of Colorado Health (UCHealth) provides evidence-based healthcare and wellness services in Colorado, Nebraska, and Wyoming, and includes the University of Colorado Hospital (UCH), Poudre Valley



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Hospital (PVH), Medical Center of the Rockies, Greeley Emergency and Surgery Center, and other clinics and outpatient services. www.uchealth.org

- Construction is underway at the \$125 million Longs Peak Hospital in Longmont. The hospital is slated to open in mid-2017 and will include 50 to 75 inpatient beds, an intensive care unit, operating rooms, an emergency department, advanced cardiology services, and a birth center.
- A four-story, 153,000-square-foot hospital in Greeley is slated to open in 2018. The UCHealth Greeley Hospital will be the anchor of the proposed medical campus that will include a three-story, 112,000-square-foot UCHealth Greeley Health Center, which is slated to open in late 2017.
- A \$315 million, six-story hospital in Highlands Ranch will open in 2018. The 33-acre hospital campus will be part of a 100-acre Shea Homes master-planned community and will include 72 inpatient beds, an intensive care unit, operating rooms, advanced cardiac services, an emergency department, and complete imaging capabilities.
- In partnership with Adeptus Health, an 18-bed hospital opened in Broomfield. The UCHealth Broomfield Hospital includes an intensive care unit, a comprehensive outpatient surgical center, and an emergency department.
- A new 36,000-square-foot Boulder Health Center opened that consolidated clinics that had been located at various locations throughout the city. Clinics at the center include family medicine, audiology, cardiology, endocrinology, and obstetrics and gynecology, among others. A new center for midwifery is slated to open in January 2017.
- A new freestanding emergency room opened in Longmont. The 7,000-square-foot emergency room is equipped with a radiology suite and on-site laboratories.
- The first phase of a two-phase tenant improvement at the UCHealth Boulder Health Center began. The improvements to 6,600 square feet of space include updated infrastructure, an ophthalmology clinic, and staff amenities.

Key Company Announcements

Notable healthcare and wellness company expansions and announcements in 2016 included:

- Eye Center of Northern Colorado plans to build a medical and surgical eye care center in the Harmony Technology Park in Fort Collins. The project will house a surgery center and eye clinic with improved access for patients to retina, glaucoma, and cataract care. The completed 28,000-square-foot project is slated for mid-2017.
- The University of Colorado Denver broke ground on a \$42.4 million, 92,000-square-foot Wellness Center at the intersection of Speer Boulevard and Auraria Parkway. The Center will include student lounges, study spaces, gaming rooms, and a health clinic.
- Front Range Orthopedic and Spine Center broke ground on a \$12 million, 32,000-square-foot office building in Longmont. The building is slated for completion in early 2017. The company also plans to expand its Loveland medical building by adding 60,000 square feet that will house orthopedic specialists, surgical suites, ambulatory services, and physical therapy space.
- California-based Drever Capital Management and Oregon-based Vista Pointe Development Co. broke ground on a new 64-bed, 37,000-square-foot memory care facility in Fort Collins and plans to build a 52-unit facility in Greeley.
- Spectrum Medical Imaging opened a 6,500-square-foot facility in Brighton. The new facility will offer a full range of diagnostic radiology services, including a Hitachi Oasis MRI that provides high-field imaging with an open design.
- New York-based Brooklyn Boulders, a rock climbing gym, plans to relocate its headquarters to Denver and will employ over 30 workers. The company will lease 2,600 square feet of office space in the River North neighborhood and plans to open a new climbing gym in the area.
- Colorado Athletic Club opened its eighth location near Denver Union Station. The 38,000-square-foot space has specialized studios for heart rate training, group fitness, and hot yoga.
- CorePower Yoga opened a new location in Denver's River North neighborhood and the company relocated its corporate headquarters to the facility.
- The Allen Co. Inc., a sporting goods manufacturer, closed on a \$2.27 million purchase of a 20-acre site in the Colorado Technology Center business park. The company plans to construct a two-building, 313,290-square-foot campus to expand manufacturing for its hunting, fishing, and other outdoor gear products.

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- California-based Chuze Fitness plans to open five gyms in Metro Denver by mid-2017. The first gyms opened in Thornton and Westminster, which include swimming pools, kids rooms, and yoga/dance studios.
- Houston-based fitness studio DEFINE Body & Mind opened a Denver location and plans to open a Boulder location in mid-2017. The company has nearly 20 locations in four states and one in Dubai.
- SNÖBAHN opened the nation's second European-style indoor ski and snowboard training gym in Centennial. The 9,000-square-foot facility includes ski ramps that can be adjusted to as steep as 20 degrees that use treadmill-like machines to replicate the feel of snow. The facility includes four slopes and a dedicated tubing hill.
- Red Fox Outdoor Equipment opened a new 3,100-square-foot flagship store in downtown Boulder. The company's North American headquarters is located in Lyons and specializes in outdoor technical gear such as tents, climbing gear, and apparel with about 20 employees.

Health Tourism Announcements

The nine-county region is an expanding medical tourism hub, offering high-quality healthcare, exceptional healthcare facilities, and an array of healthcare services. Notable announcements in 2016 included:

- Rocky Mountain Cancer Centers (RMCC) is one of 197 participants nationwide and the only one in the state to be part of a five-year Oncology Care Model initiative offered by the Centers for Medicare & Medicaid Services Innovation Center. RMCC will offer the program at all 13 of its Colorado locations and will offer standardized, evidence-based care to ensure all patients are being treated in the same way. RMCC will also invest in new personnel to allow highly coordinated care and add patient navigators.
- BCH's knee- and hip-replacement programs have been certified by The Joint Commission, the largest standards-setting and accreditation organization in the U.S. BCH has shorter-than-average length of hospital stays for patients who undergo hip or knee replacements.
- National Jewish Health established the Cohen Family Asthma Institute, which will address an emerging gap in severe asthma care, research, and education, while seeking a cure for the disease in five years. The Institute will have additional national reach through collaborations in New York with the Mount Siani—National Jewish Health Respiratory Institute, and locally with SCL Health and the HCA-HealthONE's Rocky Mountain Hospital for Children.
- Metro Denver is a leader in robotic surgery.
 - Robotic surgery is used at about one-third of Colorado hospitals, with 5,541 robotic procedures completed by surgeons in 2015. This was more than double the number of procedures completed in the state just five years ago, according to the Colorado Hospital Association. A majority of the procedures (3,705 procedures) took place in outpatient settings.
 - BCH's Foothills Hospital is the first in Colorado and the only hospital in the Rocky Mountain region to offer Mako robot-assisted total knee replacements. The Mako system creates a three-dimensional virtual model of the knee, which allows a personalized pre-operative plan. The robotic arm guides the surgeon within the predefined area and helps prevent the surgeon from moving outside the planned boundaries.
 - Presbyterian/St. Luke's Medical Center unveiled its new robotic operating system, bringing the hospital's robotics surgical systems to four and making it arguably the market leader for this sector. The hospital is one of only five hospitals nationwide to have the Flex system and the only one west of the Mississippi River. The hospital performed between 850 and 900 surgeries using the system in 2016.
- LUH received several certifications and accreditations. The Hope Cancer Care Center was awarded accreditation in radiation oncology from the American College of Radiology. Also, LUH received certification for its hip, knee, and shoulder replacement procedures from The Joint Commission.
- UHealth acquired the Steadman Hawkins Clinic-Denver, adding high profile sports surgeons and physicians to its portfolio. The Steadman Hawkins Clinic provides the official team doctors for the Denver Broncos and Colorado Rockies. The partnership will allow UHealth to care for more patients throughout the Rocky Mountain region, train additional sports fellows, and extend clinical trials. The new sports-medicine center will include a 90,000-square-foot medical office building, surgery center, four operating rooms, and a state-of-the-art rehabilitation and sports-performance training center.
- The Colorado Institute for Maternal and Fetal Health provides comprehensive care and treatment before, during, and after high-risk or routine pregnancies. The center is a partnership between the UCH, the University of Colorado School of Medicine, and Children's Hospital Colorado, which provides care to about 3,800 patients per year. Additionally, the Center provides about 200 complex deliveries

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per year—a rate that has grown 10 percent per year since 2010—and is one of the most preeminent in the world due to its collaboration between the school and two hospitals.

- The Colorado Center for Reproductive Medicine (CCRM) is one of the nation's leading fertility clinics, providing a wide variety of treatments ranging from basic infertility care to the most advanced technology available. Two-thirds of CCRM's patients travel to Colorado from other states and countries for treatment. CCRM is internationally recognized for success rates and scientific achievements in the field of reproductive endocrinology.

Major Collaborations and Partnership Activity

Numerous partnerships and collaborations were announced in 2016 that are helping to improve healthcare delivery and increase efficiency. Further, several healthcare and wellness companies in the region announced mergers and acquisitions in 2016.

- Boulder-based Command Health partnered with Alabama-based SourceMed to offer a new form of clinical documentation for physicians working at the ambulatory surgery centers. The partnership will integrate Command Health's mobile clinical documentation app with SourceMed's billing technology.
- Colorado State University (CSU) and UHealth partnered to focus on academics and healthcare. UHealth will work with CSU Health Networks to build and help staff the CSU Health and Medical Center. Further, UHealth will continue to serve as the preferred healthcare provider, increasing the quality and value of healthcare for CSU and will extend its role as the exclusive healthcare partner of CSU Athletics.
- Denver Nephrologists P.C. and South Denver Nephrology Associates merged and created the state's largest nephrology services organization. Colorado Kidney Care P.C. will expand services to referring physicians, hospitals, and patients.
- The Colorado Visiting Nurse Association and Northern Colorado's Rehabilitation & Visiting Nurse Association merged. The company's combined headquarters in Denver will continue to serve 15 Front Range counties.
- Greenwood Village-based Envision Healthcare Holdings Inc. merged with AmSurg Corp. The combined company, called Envision Healthcare Corp., will have market capitalization of \$10 billion and combined revenue of \$8.5 billion.
- Denver-based Bonfils Blood Center merged with Arizona-based nonprofit Blood Systems Inc. Bonfils will retain its name and services in the communities and Blood System's mountain division will be headquartered in Denver.
- Nashville-based Correction Corporation of America purchased Boulder-based Correctional Management Inc. (CMI) for \$35 million. CMI operates seven correctional treatment centers with a total of 605 beds in Colorado.
- Denver-based DaVita HealthCare Partners Inc. acquired The Everett Clinic Medical Group in a \$385 million deal. The 20-site physician practice in Seattle will help DaVita expand growth in the Puget Sound region.
- Denver-based BioScrip Inc. purchased New Jersey-based HS Infusion Holdings Inc. in a deal valued at \$85 million. The deal will provide customer-focused pharmacy and related healthcare infusion therapy services into the home or alternate-site setting.
- Private equity firm Welsh, Carson, Anderson & Stowe purchased a majority stake in Denver-based InnovAge, allowing the Denver-based senior-care company to transition from a nonprofit to a for-profit and expand its Program for All-Inclusive Care for the Elderly services. InnovAge plans to create the NextFifty Initiative, a new foundation that will fund programs for low- and moderate-income and aging individuals with physical, cognitive, and behavioral issues.

Cross-Cluster Convergence

The region's healthcare and wellness companies are developing breakthrough therapies to support the state's aging population and growing millennial population. For example, Boulder-based Accera opened two trial sites in the state to research Alzheimer's disease. Additionally, more than 130 digital health companies are appealing to health and wellness goals for millennials. Boulder-based SomaLogic is developing a wellness chip to enable early detection of diseases and health conditions to monitor well-being. The synergy between bioscience, healthcare, and IT-software supports the region as a national leader in expanding digital health. Other digital health companies including Prima-Temp, RxREU, Welltok, iTriage, RxAssurance, and Cerescan are developing advanced technologies to improve health.

HEALTHCARE AND WELLNESS:

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- Metro Denver is an emerging digital health community. Founded in July 2012 by the Denver South Economic Development Partnership and Innovation Pavilion, Prime Health is a growing statewide community of 1,600+ health care executives, physicians, technologists, academics, entrepreneurs, and investors dedicated to improving health and lowering healthcare costs through the commercialization of digital health technologies. Prime Health is a resource ecosystem for Digital Health—the convergence of the digital and genetics revolutions with bioscience, healthcare and wellness, and information technology-software. Colorado is home to more than 130 digital health companies.
- StartUp Health Colorado launched to create a health innovation hub in the Rocky Mountain region. The organization partnered with Children’s Hospital Colorado, UHealth, and the University of Colorado to streamline the pathways for health entrepreneurs to innovate and grow.
- Plans were announced for Catalyst HTI, a health-tech industry integration project slated to open in 2018 in Denver’s River North neighborhood. The project will integrate building space for startups, Fortune 500 companies, and healthcare providers in one location, enabling startups with resources to grow and exposing providers and larger companies to emerging technologies and human capital. The concept will be the first of its kind and has already received support from Terumo BCT, the University of Colorado Anschutz Medical Campus, and the American Diabetes Association.

Industry Infrastructure Support

The nine-county region is home to numerous foundations and organizations that are dedicated to advancing the vibrant healthcare and wellness industry.

- Flat 14ers is an initiative to encourage children, families, teachers, and community members to increase their levels of physical activity by climbing virtual 14,000-foot mountain peaks (14ers). The online tracking system provides individuals an easy and fun way to become active and stay active by converting minutes of physical activity such as running, playing basketball, cycling, or walking into steps toward reaching the summit of a 14er. The initiative is part of the Tri-County Health Department’s Communities Putting Prevention to Work Grant with partners including school districts, parks and recreation agencies in Adams, Arapahoe, and Douglas Counties, CBS4, America On the Move, and Children’s Hospital Colorado.
- Swedish outdoor gear manufacturer Fjällräven launched its first U.S. trekking event to Colorado. The Fjällräven Classic was a three-day, 20-mile camping and hiking trek through the mountains in August. The company’s U.S. operation is based in Loveland and is home to about 80 employees.
- The Center for Improving Value in Health Care (CIVHC) is a nonprofit organization that helps Colorado drive, deliver, and buy value in healthcare. The Center administers the pioneering Colorado All Payer Claims Database that offers the state’s most comprehensive healthcare cost, quality, and utilization claims data.
- The Colorado Health Foundation (CHF) is one of the largest health-focused foundations in the country, providing grants to nonprofits with the focus on encouraging healthy living. Located in Denver, CHF works to increase accessibility to quality healthcare, provides graduate medical education to increase the healthcare workforce, and works with foundation partners to address health issues in Colorado. CHF hosts the annual Colorado Health Symposium that is one of the leading national health policy conferences in the nation.
- The Colorado Trust was formed in 1985 as a dedicated foundation to advance the health and well-being of Coloradans. The Trust collaborates with individuals, organizations, and communities across the state to expand health coverage and improve the healthcare system. Through grant support, the Trust is dedicated to achieving access to healthcare for all Coloradans.
- The Colorado Outdoor Recreation Industry Office (OREC), located in Denver, supports and advances the state’s recreational opportunities and future health of Colorado. The office provides a central point of contact, advocacy, resources, and support for the diverse constituents, businesses, communities, and groups that rely on the ongoing health of the outdoor recreation industry. In 2016, OREC hosted its inaugural Colorado Outdoor Industry Leadership Summit to connect outdoor industry representatives from around the state.

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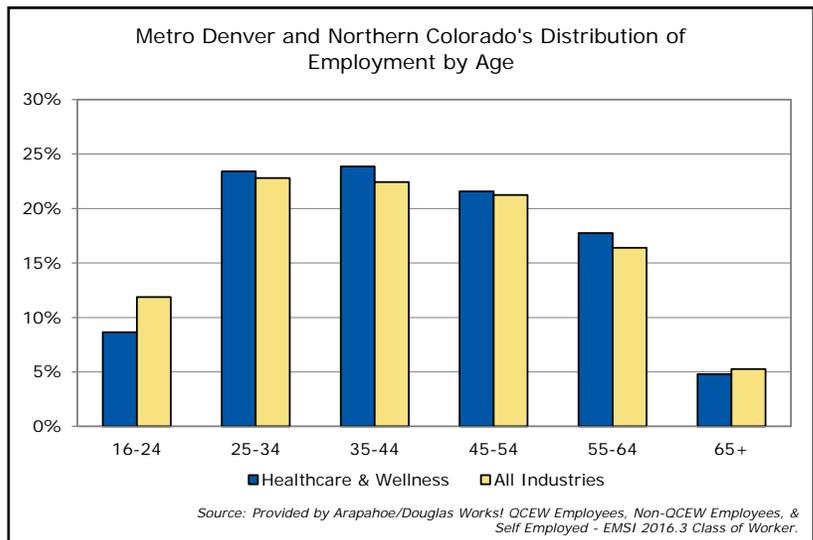
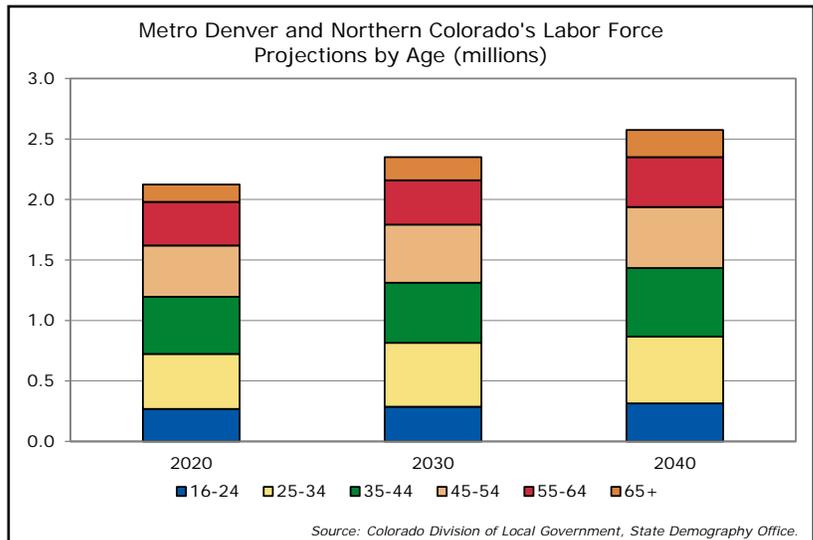
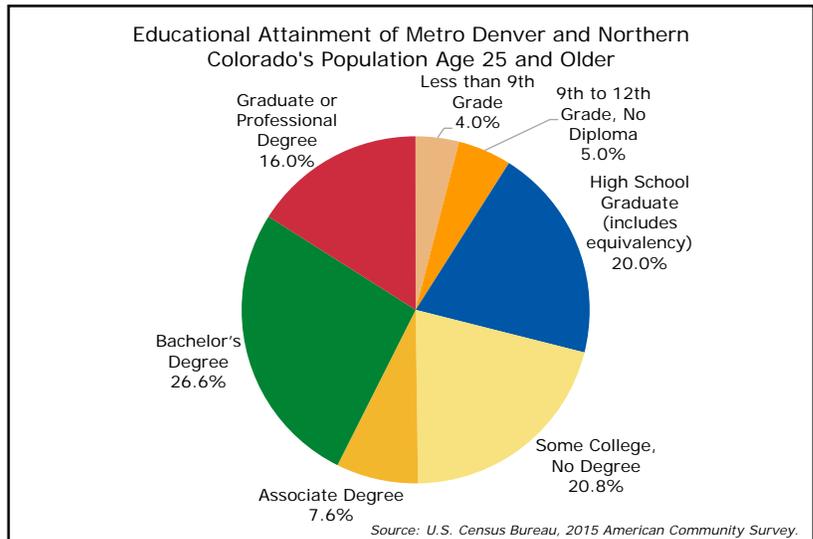
Healthcare and Wellness Workforce Profile

Many companies choose locations because of the available workforce. With nearly half of the nine-county region's 3.8 million residents under the age of 35, employers can draw from a large, young, highly educated, and productive workforce. Of the region's adult population, 42.6 percent are college graduates and 91 percent have graduated from high school. The state has the nation's second-most highly educated workforce as measured by the percentage of residents with a bachelor's degree or higher.

The attractiveness of the region draws new residents through in-migration. The region's population is expected to grow 31 percent from 2020 to 2040, driving a 21.2 percent increase in the region's labor force over the same period. It is important to note the changing composition of the workforce supply as the baby boomers begin to retire, which will pose implications for businesses whose employee pool includes significant numbers of these workers.

The nine-county region's healthcare and wellness industry cluster employs 214,430 people and includes a large pool of talented, well-educated, and highly skilled workers. Compared with the age distribution across all industries in the region, the healthcare and wellness cluster has a larger share of employees in all age categories except the 16 to 24 years and 65 years and older categories.

The healthcare and wellness workforce supply consists of four main components: those currently working in the industry; those doing a similar type of job in some other industry; the unemployed; and those currently in the education pipeline. The Metro Denver and Northern Colorado Occupation & Salary Profile below includes the 10 largest healthcare and wellness occupations in the region. For these 10 largest occupations, the chart details the total number of workers employed in that occupation across all industries, the number of available applicants that would like to be working in that occupation, the number of recent graduates that are qualified for that occupation, and the median and sample percentile annual salaries.



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Wages

The 2015 average annual salary for a healthcare and wellness worker in the nine-county region was \$56,040, compared with the national average of \$56,840. Total payroll for the healthcare and wellness cluster in the region exceeded \$11.4 billion in 2015.

Metro Denver and Northern Colorado Healthcare and Wellness Occupation & Salary Profile, 2016

10 Largest Healthcare and Wellness Occupations in Metro Denver and Northern Colorado	Total Working Across All Industries (2016)	Number of Available Applicants (2016)	Number of Graduates (2015)	Median Salary	10th Percentile Salary	25th Percentile Salary	75th Percentile Salary	90th Percentile Salary
1. Registered nurses	34,516	518	2,230	\$71,552	\$51,862	\$59,045	\$82,870	\$96,260
2. Personal care aides	20,095	623	38	\$21,641	\$18,162	\$19,692	\$23,285	\$24,835
3. Nursing assistants	13,216	304	1,390	\$30,644	\$23,641	\$26,162	\$34,680	\$38,323
4. Home health aides	11,568	266	70	\$26,780	\$19,118	\$21,254	\$30,190	\$36,876
5. Business operations specialists, all other	33,547	1,510	50	\$79,615	\$41,759	\$54,434	\$97,749	\$126,953
6. Receptionists & information clerks	15,163	1,653	0	\$31,487	\$20,499	\$25,005	\$36,662	\$44,678
7. Medical assistants	6,990	161	1,356	\$34,431	\$26,187	\$29,388	\$38,603	\$44,937
8. Secretaries & administrative assistants, except legal, medical, & executive	45,568	4,967	45	\$37,664	\$24,083	\$29,685	\$45,347	\$53,942
9. Fitness trainers & aerobics instructors	6,328	196	245	\$40,627	\$20,326	\$26,051	\$51,627	\$61,911
10. Medical secretaries	5,377	586	262	\$37,501	\$25,846	\$31,216	\$43,948	\$49,750

Notes: The number of available applicants is a point-in-time measurement of the number of people who have registered in Colorado's workforce development system's statewide database, Connecting Colorado, as being able and available to work in a particular occupation. Results should be interpreted with caution since registration in Connecting Colorado is self-reported. In addition, the skills rubric may assign up to four occupation codes for each registrant. Therefore, the number of available applicants could be inflated. *Source: Provided by Arapahoe/Douglas Works!; QCEW Employees, Non-QCEW Employees, & Self Employed - EMSI 2016.3 Class of Worker.*

Education & Training

Colorado's higher education system provides an excellent support system for businesses in the region. There are 28 public higher education institutions in Colorado, of which seven four-year and six two-year public institutions offering comprehensive curricula are located in the nine-county region. In addition, there are more than 100 private and religious accredited institutions and more than 350 private occupational and technical schools offering courses in dozens of program areas throughout the state. Although not exhaustive, a list of the major, accredited educational institutions with the greatest number of graduates for each of the 10 largest healthcare and wellness occupations in the nine-county region are included below. A directory of all higher education institutions with corresponding websites may be accessed via <http://higher.ed.colorado.gov>.

- American Sentinel University
www.americansentinel.edu
- Front Range Community College
www.frontrange.edu
- Southwest Acupuncture College
www.acupuncturecollege.edu
- Arapahoe Community College
www.arapahoe.edu
- Institute of Taoist Education and Acupuncture, Inc.
<http://itea.edu>
- University of Colorado: Anschutz Medical Campus, Boulder, Denver
www.cu.edu
- Colorado School of Traditional Chinese Medicine
www.cstcm.edu
- Metropolitan State University of Denver
www.msudenver.edu
- University of Northern Colorado
www.unco.edu
- Colorado State University
www.colostate.edu
- Regis University
www.regis.edu
- Colorado State University Global Campus
www.colostate.edu
- Rocky Vista University
www.rvu.edu

Key Reasons for Healthcare and Wellness Companies to Locate in the Nine-County Region

The region is a top healthcare and wellness location offering:

1. A robust culture of health and wellness

- Colorado has the lowest adult obesity rate in the nation (20.2 percent) and is the only state with an obesity rate below 21 percent. (Trust for America's Health, 2016; Robert Wood Johnson Foundation, 2016)
- Colorado ranked as the most physically active state in the nation with over 82 percent of adults participating in physical activity in the past month. (The Henry J. Kaiser Family Foundation, 2016)
- Metro Denver ranked as the third-fittest metropolitan area in the U.S. in 2016. Increased physical activity, low obesity and diabetes rates, and access to recreational opportunities contributed to its high rank. (American College of Sports Medicine, 2016)
- The Boulder Metropolitan Statistical Area (MSA) ranked No. 1 among 190 metro areas for having the lowest rates of diabetes. The Fort Collins MSA ranked third and the Denver-Aurora-Lakewood MSA ranked 25th. (Gallup-Healthways, 2016)
- Denver ranked among the nation's 28 largest cities for several health indicators including the lowest incidence of tuberculosis, the highest rate of pneumonia vaccinations among adults 65 years and older, the second-lowest rate of adult obesity, and the second-highest rate of physical activity. (The Big Cities Health Coalition, 2016)
- Outdoor recreation is a fundamental component to Colorado's healthy, active lifestyle and generates a \$34.5 billion economic impact annually. The state has the fourth-highest percentage of state land area devoted to national forests and public lands, more than 70 state parks and wilderness areas, and is home to the highest concentration of 13,000 and 14,000-foot peaks in the nation. (Colorado Tourism Office, 2016)
- Colorado ranked seventh among the healthiest states for adults ages 65 years and older. Colorado's seniors had the highest rate of physical activity among any other state, the second-lowest senior obesity rate, and the third-lowest rate of preventable hospitalizations. (United Health Foundation, 2016)
- Fort Collins and Boulder ranked among the top 10 metro areas for residents' overall health and well-being. Colorado ranked fourth for its residents' overall well-being. (Gallup-Healthways, 2016)
- Douglas County ranked as the healthiest county in Colorado. The City and County of Broomfield (second), Boulder (fourth), and Larimer (eighth) were also included in the top 10. (University of Wisconsin Population Health Institute, 2016)
- Colorado scored among the top 10 in the nation on three of the six healthy aging indicators. The state's older adults had the highest rate of physical activity of any state, low rates of activity limitations, and ranked ninth for immunization rates. (Colorado Health Foundation, 2016)
- Colorado's nearly 350 organic farmers, ranchers, and food processors account for an estimated \$2.5 billion in organic sales, or approximately 10 percent of overall U.S. sales of organic products. (Colorado Department of Agriculture, 2016)

2. The ability to recruit and retain a healthy, skilled, and productive workforce

- Healthy employees average 38 fewer unhealthy days per year and cost an average of \$4,000 less each year in healthcare costs than unhealthy employees. (Gallup-Healthways Well-Being Index, 2016; University of Michigan Health Management Research Center, 2016)
- Colorado has one of the nation's most educated workforces, ranking second among the 50 states for percentage of residents (39.2 percent) with a bachelor's degree or higher. (U.S. Census Bureau, 2015 American Community Survey)
- Colorado ranked ninth for the number of science, engineering, and health graduate students per 1,000 individuals ages 25 to 34 years old in 2013. (National Science Foundation, 2015)
- Boulder and Fort Collins ranked among the top five most-educated metro areas in the nation in 2016. (ValuePenguin.com, 2016)
- Metro Denver ranked fifth among the top 15 major metros for college graduates in 2016. Fort Collins ranked fourth among small metro areas. (American Institute for Economic Research, 2016)
- The Colorado Rural Health Center's Colorado Provider Recruitment (CPR) program focuses on expanding the primary care workforce throughout Colorado's rural and urban underserved healthcare communities. CPR has worked with over 80 communities and has recruited over 150 healthcare providers. (Colorado Rural Health Center, 2016)

3. The convergence of health-related education, research, and application

- The University of Colorado School of Medicine ranked 11th nationally for primary care, with the specialties of pediatrics (fourth), family medicine (fifth), and rural medicine (sixth) also ranking high. The School of Medicine ranked 35th for research. (*U.S. News & World Report*, 2016)
- The College of Nursing at the University of Colorado ranked among the nation's top-25 nursing master's and doctor of nursing practice programs in 2016. (*U.S. News & World Report*, 2016)
- The University of Colorado Denver and Red Rocks Community College are Metro Denver's only institutions with accredited entry-level physician assistant programs. (Colorado Health Institute, 2016)
- The University of Colorado School of Medicine offers programs in dental medicine, medicine, nursing, pharmacy, and public health and 11.3 million square feet of newly built training facilities for future health professionals. (University of Colorado, 2016)
- The Colorado School of Public Health is the first accredited and only collaborative school of public health in the Rocky Mountain region. (The Colorado School of Public Health, 2016)
- The Skaggs School of Pharmacy and Pharmaceutical Sciences at the University of Colorado ranked among the top 25 percent of pharmacy schools in the nation and ranked fifth out of 75 academic pharmacy schools in total National Institutes of Health funding. (*U.S. News & World Report*, 2016; National Institutes of Health, 2016)
- The College of Nursing at the University of Colorado was the birthplace of the nation's first school nurse programs and the first nurse practitioner programs in the world. The College's Pediatric Nurse Practitioner and Informatics specialty programs ranked among the top 10 in the nation. (University of Colorado, 2015; *U.S. News & World Report*, 2016)
- The University of Colorado School of Medicine ranked among the nation's top-25 institutions in total NIH funding, reaching \$173.5 million in fiscal year 2015. The medical school departments of pediatrics, dermatology, obstetrics and gynecology, and physical medicine ranked among the nation's top-10 in NIH funding. (National Institutes of Health, 2016)

4. A regional health hub, with expanding medical and wellness tourism opportunities

- HealthGrades awarded several honors to hospitals in the nine-county region in 2016. Ten earned the 2016 Distinguished Hospital Award for Clinical Excellence, four were named among "America's 100 Best Hospitals," and six received awards for Outstanding Patient Experience. (HealthGrades, Inc., 2016)
- Nine nine-county region hospitals received "A" grades in hospital safety, 12 received a "B" grade, and four received a "C" grade. (The Leapfrog Group, 2016)
- The University of Colorado Hospital (Aurora), UCHealth-Poudre Valley Hospital (Fort Collins), and Rose Medical Center (Denver) were named among the nation's top-100 hospitals. (Truven Health Analytics, 2016)
- Two Metro Denver hospitals were named to *Becker's Hospital Review* "100 Hospitals with Great Orthopedic Programs" in 2016 including UCHealth-Poudre Valley Hospital and University of Colorado Hospital. (*Becker's Hospital Review*, 2016)
- National Jewish Health is the leading respiratory hospital in the nation and the only healthcare organization to be fully focused on respiratory related illnesses. (National Jewish Health, 2016)
- The Barbara Davis Center for Childhood Diabetes is one of the largest diabetes programs specializing in type 1 diabetes research and care for children and adults in the world. (The Barbara Davis Center for Childhood Diabetes, 2016)
- Metro Denver is home to seven hospitals that have achieved Magnet® designation, the highest credential for nursing excellence. (American Nurses Credentialing Center, 2016)
- The University HealthSystem Consortium awarded UCHealth-Poudre Valley Hospital the Bernard A. Birnbaum Quality Leadership Award in 2016. (University HealthSystem Consortium, 2016)
- Children's Hospital Colorado (CHC) ranked among the top 10 children's hospitals in the nation with four of its specialty areas among the top 10 in their respective categories. CHC was also named to the *U.S. News'* Honor Roll, ranked fifth on *Parents* magazine's top children's hospitals in the nation, and was named the winner of the 2015 American Hospital Association-McKesson Quest for Quality Award. (*U.S. News & World Report*, 2016; *Parents*, 2013; American Hospital Association, 2015)
- Five Metro Denver hospitals were ranked among the 2016-2017 "Best Hospitals." UCH was named as the top facility in Metro Denver and the 20th-best hospital in the nation. (*U.S. News & World Report*, 2016)
- HCA-HealthONE's Rocky Mountain Hospital for Children (RMHC) houses the region's largest neonatal intensive care unit and the largest, high-risk obstetrical program. RMHC cares for infants, children, and teenagers across a six-state region. (Rocky Mountain Hospital for Children, 2016)

HEALTHCARE AND WELLNESS:

Metro Denver and Northern Colorado Industry Cluster Profile

5. An overall better quality of life

- Highlands Ranch ranked sixth in *MONEY Magazine's* 2016 "Best Places to Live" list. Centennial (13th) and Broomfield (25th) were also named to the list's top-25. (*MONEY Magazine*, 2016)
- Denver ranked No. 1 among *U.S. News & World Report's* 2016 "Best Places to Live." Denver's healthy job market and access to the outdoors contributed to its notable rank. (*U.S. News & World Report*, 2016)
- Denver ranked fifth among the "2016's Best Large Cities to Live In." Denver scored first for livability and third for local economy and taxes. (WalletHub, 2016)
- Seven Metro Denver cities ranked among the 2016 list of the "100 Best Places to Live." Boulder ranked fifth, followed by Fort Collins (13th), Longmont (23rd), Littleton (24th), Lakewood (26th), Loveland (41st), and Lafayette (44th). (Livability.com, 2016)
- The Fort Collins MSA and the Denver-Aurora-Lakewood MSA ranked among the top 10 "Best Cities to Retire" in 2016. Fort Collins ranked highly for healthcare and safety. (ValuePenguin.com, 2016)
- FasTracks is a multibillion dollar comprehensive transit expansion plan to build 122 miles of new commuter rail and light rail, 18 miles of bus rapid transit, 21,000 new parking spaces at light rail and bus stations, and enhance bus service for easy, convenient bus/rail connections across the eight-county district.

Healthcare and Wellness Industry Cluster Definition

NAICS Code*	NAICS Description	SIC Code	SIC Description
315220 (P)	Men's & boys' cut & sew apparel mfg.	2329-01	Men's & boys' sportswear & athletic clothing
315240 (P)	Women's, girls', & infants' cut & sew apparel mfg.	2339-03	Women's & misses' athletic clothing & sportswear
336991 (P)	Motorcycle, bicycle, & parts manufacturing	3751-02	Bicycles & related parts
339115 (P)	Ophthalmic goods mfg.	3851	Ophthalmic goods (except intraocular lenses)
339116	Dental laboratories	8072	Dental laboratories
339920	Sporting & athletic goods mfg.	3949	Sporting & athletic goods, NEC
423450	Medical, dental, & hospital equip. & supplies merchant wholesalers	5047	Medical, dental & hospital equip. & supplies (merchant wholesalers except those selling medical, dental, and hospital equipment and supplies via retail method)
423460	Ophthalmic goods merchant wholesalers	5048	Ophthalmic goods, NEC
423910 (P)	Sporting & recreational goods & supplies merchant wholesalers	5091	Sporting & recreation goods
424210 (P)	Drugs & druggists sundries merchant wholesalers	5122-0310	Vitamins & minerals
424340 (P)	Footwear merchant wholesalers	5139-9902	Footwear, athletic
424490 (P)	Other grocery & related products merchant wholesalers	5149-06	Organic & diet food
446191	Food (health) supplement stores	5499-01	Health & dietetic food stores
532291	Home health equipment rental	7352	Medical equipment rental
532292	Recreational goods rental	7999-9911	Recreation equipment rental
611620	Sports & recreation instruction	7999-11	Instruction schools, camps, & services
611710 (P)	Educational support services	8299-9910	Meditation therapy
621111	Offices of physicians (except mental health specialists)	8011	Offices & clinics of doctors of medicine
621111	Offices of physicians (except mental health specialists)	8031	Offices & clinics of doctors of osteopathy
621112	Offices of physicians, mental health specialists	8011	Offices & clinics of doctors of medicine
621112	Offices of physicians, mental health specialists	8031	Offices & clinics of doctors of osteopathy
621210	Offices of dentists	8021	Offices & clinics of dentists
621310	Offices of chiropractors	8041	Offices & clinics of chiropractors
621320	Offices of optometrists	8042	Offices & clinics of optometrists
621330	Offices of mental health practitioners (except physicians)	8049	Offices & clinics of health practitioners, NEC
621340	Offices of physical, occupational speech therapists, & audiologists	8049	Offices & clinics of health practitioners, NEC
621391	Offices of podiatrists	8043	Offices & clinics of podiatrists
621399	Offices of all other miscellaneous health practitioners	8049	Offices & clinics of health practitioners, NEC

HEALTHCARE AND WELLNESS:

Metro Denver and Northern Colorado Industry Cluster Profile

Healthcare and Wellness Industry Cluster Definition Cont'd

NAICS Code*	NAICS Description	SIC Code	SIC Description
621410	Family planning centers	8093	Specialty outpatient facilities, NEC
621410	Family planning centers	8099	Health & allied services, NEC
621420	Outpatient mental health & substance abuse centers	8093	Specialty outpatient facilities, NEC
621491	HMO medical centers	8011	Offices & clinics of doctors of medicine
621492	Kidney dialysis centers	8092	Kidney dialysis centers
621493	Freestanding ambulatory surgical & emergency centers	8011	Offices & clinics of doctors of medicine
621498	All other outpatient care centers	8093	Specialty outpatient facilities, NEC
621511	Medical laboratories	8071	Medical laboratories
621512	Diagnostic imaging centers	8071	Medical laboratories
621610	Home health care services	8082	Home health care services
621910 (P)	Ambulance Services	4119-9902	Ambulance service
621991	Blood & organ banks	8099	Health & allied services, NEC
621999	All other misc. ambulatory health care services	8099	Health & allied services, NEC
622110	General medical & surgical hospitals	8062	General medical & surgical hospitals
622110	General medical & surgical hospitals	8069	Specialty hospitals, except psychiatric
622210	Psychiatric & substance abuse hospitals	8063	Psychiatric hospitals
622210	Psychiatric & substance abuse hospitals	8069	Specialty hospitals, except psychiatric
622310	Specialty (except psychiatric & substance abuse) hospitals	8069	Specialty hospitals, except psychiatric
623110	Nursing care facilities (skilled nursing facilities)	8051	Skilled nursing care facilities
623110	Nursing care facilities (skilled nursing facilities)	8052	Intermediate care facilities
623110	Nursing care facilities (skilled nursing facilities)	8059	Nursing & personal care facilities, NEC
623210	Residential intellectual & developmental disability facilities	8052	Intermediate care facilities
623311	Continuing care retirement communities	8051	Skilled nursing care facilities
623311	Continuing care retirement communities	8052	Intermediate care facilities
623311	Continuing care retirement communities	8059	Nursing & personal care facilities, NEC
624190 (P)	Other individual & family services	8322-0400	Rehabilitation services
624190 (P)	Other individual & family services	8322-0500	Family counseling services
624190 (P)	Other individual & family services	8322-0501	Family (marriage counseling)
624190 (P)	Other individual & family services	8322-0600	General counseling services
624190 (P)	Other individual & family services	8322-0601	Community center
624190 (P)	Other individual & family services	8322-0602	Helping hand service (Big Brother, etc.)
624190 (P)	Other individual & family services	8322-0603	Multi-service center
624190 (P)	Other individual & family services	8322-0605	Outreach program
624190 (P)	Other individual & family services	8322-0608	Self-help organization, NEC
624190 (P)	Other individual & family services	8322-08	Substance abuse counseling
624210 (P)	Community food services	8322-9901	Meal delivery program
713940	Fitness & recreational sports centers	7991	Physical fitness facilities
713940	Fitness & recreational sports centers	7999-9910	Recreation center
713990 (P)	All other amusement & recreation industries	7999-9912	Recreation services
812191	Diet & weight reducing centers	7299-0102	Diet center, without medical staff
812199 (P)	Other personal care services	7299-0200	Massage parlor & steam bath services
812199 (P)	Other personal care services	7299-0201	Massage parlor
813212	Voluntary health organizations	8399-9906	Health systems agency
813319 (P)	Other social advocacy organizations	8399-9905	Health & welfare council
923120	Administration of public health programs	9431	Administration of public health programs

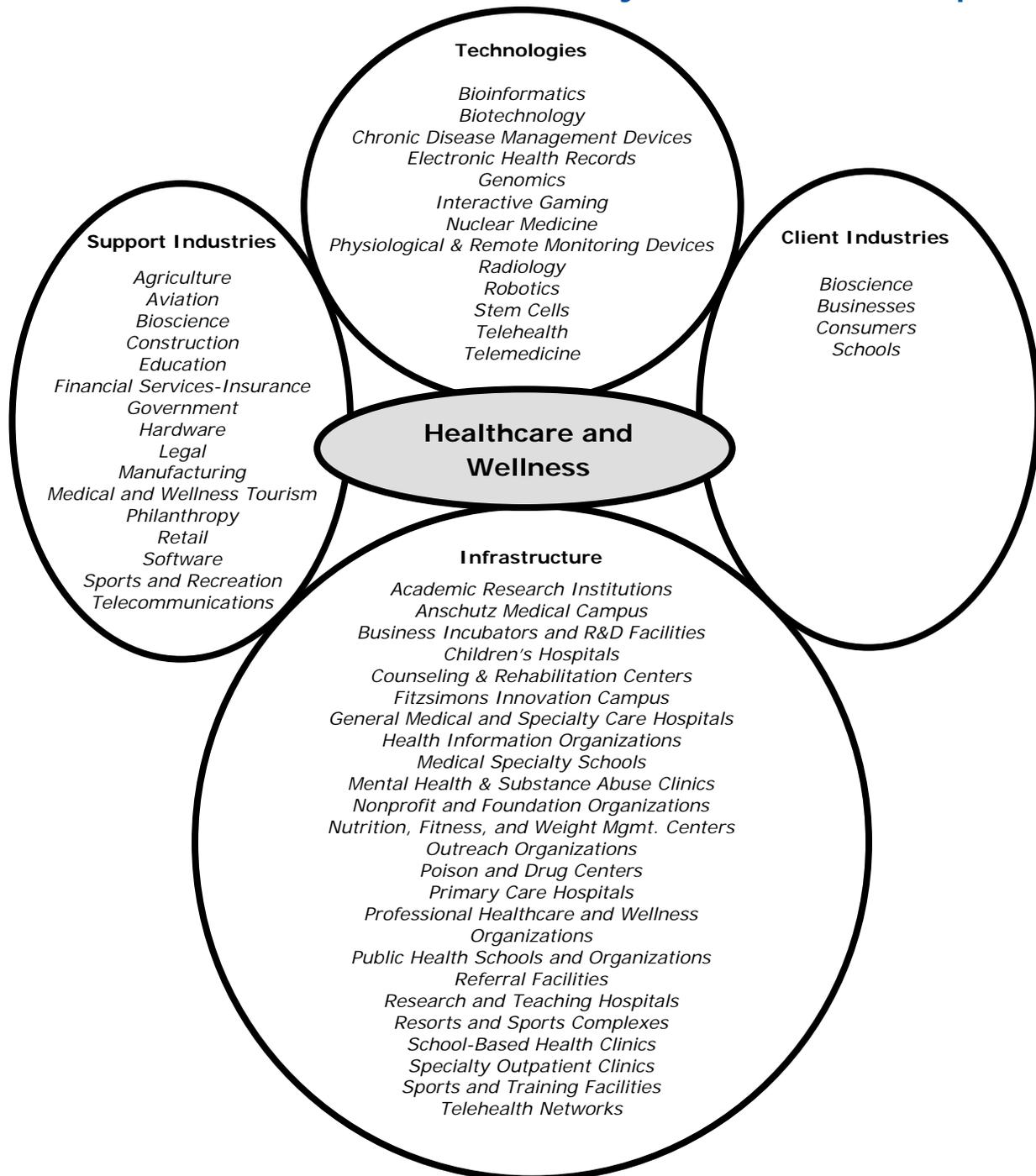
*(P) indicates that only part of the NAICS industry category is represented in the industry cluster definition.

Note: NEC indicates "not elsewhere classified."

HEALTHCARE AND WELLNESS:

Metro Denver and Northern Colorado Industry Cluster Profile

Healthcare and Wellness Industry Cluster Relationships



For additional information, contact us:



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