Welcome

During a time of transformation and uncertainty in the health care field, workforce issues remain a key concern. Talent shortages, new care delivery models, demographic changes, consolidation and emerging technologies are just a few of the factors with implications for the way hospitals, health systems and their related entities need to staff their organizations.

This report brings together key statistics and insights that have direct, significant impact on the health care workforce as we work to shape the health care delivery system of the future. Read on for key insights and information that you can use to inform and guide your work in 2018.

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Physicians  
RNs  
Physician Assistants  
Nurse Practitioners  
Psychiatrists  
Physical Therapists
About HealthCareerCenter.com

HealthCareerCenter.com is brought to you by the American Hospital Association to connect health care employers and top talent in all disciplines through its online job board network.

Employers: Broaden your job posting reach through a gateway to 3 million members of more than 330 prestigious health care professional associations and societies as part of the National Healthcare Career Network.

Health care professionals: Access thousands of job opportunities from high-quality employers and benefit from career development tools and resources.

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Suggestions?
Do you have a request about what type of information you’d like to see in next year’s report? Email us at careercenter@aha.org.

More resources
Institute for Diversity and Health Equity — diversityconnection.org
AHA Workforce Center — aha.org/workforce
Physician Leadership Alliance — ahaphysicianforum.org
American Society for Healthcare Human Resources Administration — ashhra.org
Team Stepps — aha.org/teamtraining
Hospitals, health systems and health organizations recognize that access to health care for individuals is the cornerstone of developing healthy communities across the nation. This issue includes the topics of affordability, coverage, health equity and the widespread need for behavioral and social services. Without an adequate and appropriately trained supply of health professionals, the hospital field will not be able to meet the needs of an aging population, care for patients in rural and urban communities, address behavioral health needs and provide the breadth of services the changing health care environment will demand.

The Affordable Care Act
County-by-county analysis of current projected insurer participation in health Insurance exchanges, according to the Centers for Medicaid & Medicare Services as of September 2017.

Notes: All state exchange data are self-reported from the exchanges to CMS. All data reflected on this map is a point in time as of 9/20/2017 and is expected to fluctuate. This map represents continued 2017 county-level participation in 2018 unless a carrier has publicly announced otherwise. Enrollment numbers reflected are plan selections as of the end of open enrollment, Jan. 31, 2017, and do not include enrollment in single-carrier counties for state-based exchanges.

28.1 MILLION
Record low uninsured rate
• In 2016, 28.1 million people were uninsured, and the uninsured rate fell to a record low of 8.8%.*
• 20.5 million people have gained health insurance since 2010.**

Access: COVERAGE

Access: WORKFORCE

Nursing challenges remain
• 1.2 million vacancies will open up for registered nurses between 2014 and 2022.* A combination of an aging patient population and the retirement of nurses contribute to this trend.**
• The Nurse Licensure Compact allows nurses to have one multistate license, with the ability to practice in both their home state and other compact states. 25 states have joined the compact. This program can facilitate telenursing.***


49% of physicians often or always experience feelings of burnout.*
Physician shortage looms

- The nation faces a shortage of between 40,800 and 104,900 physicians by 2030.**
- First-year enrollment at U.S. medical schools has increased by 28% since 2002, with 22 new schools accounting for nearly 40% of the growth.**
- ACGME-accredited, entry-level residency positions are continuing to grow at a rate of about 1% per year. Federal caps on Medicare-funded residency training positions remain effectively frozen at 1996 levels.**

** "Results of the 2016 Medical School Enrollment Survey," Association of American Medical Colleges, 2017

Diversity in your patients, workforce

- To improve health equity, organizations first need to understand where disparities exist. This requires the accurate collection of race, ethnicity and language data, along with the resources to analyze it.∗
- As patient populations become increasingly diverse, providing culturally competent care is more important than ever. The changing composition of staff provides leaders with unique capabilities that can be leveraged to tailor care experiences so that they are more effective and appropriate. Recent research shows that more racially and ethnically diverse companies outperform other organizations financially.∗


Outpatient facilities

Hospitals are investing more in outpatient facilities, from full-scale service centers to urgent care centers to stand-alone emergency departments.*

<table>
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<th>Year</th>
<th>OUTPATIENT REVENUE</th>
<th>INPATIENT REVENUE</th>
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<td>1994</td>
<td>28%</td>
<td>72%</td>
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<tr>
<td>2015</td>
<td>47%</td>
<td>53%</td>
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** "AHA TrendWatch Key Statistics for Hospitals," American Hospital Association, May 2017

Hospitals, including their ripple effect, support:

- 6 million total jobs, or one of nine jobs, in the U.S.
- More than $2.8 trillion in economic activity.∗

Based on current hiring trends, health care will become the nation’s largest sector by 2019, passing the entire retail sector.‘’

* "Hospitals are Economic Anchors in their Communities," American Hospital Association, January 2017


21% of physicians’ time is spent on non clinical paperwork, the equivalent of 168,000 physician FTEs not engaged in clinical activities.∗
**Access:** BEHAVIORAL HEALTH

### The drug and opioid crisis

- Drug overdoses are now the leading cause of death among Americans younger than 50. In 2016, they exceeded 59,000, a 19% increase from 2015. *

- Since 1999, the amount of prescription opioids sold in the U.S. nearly quadrupled, yet there has not been an overall change in the amount of pain that Americans report.”

The majority of drug overdose deaths (more than six out of 10) involve an opioid.**

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**"Drug overdose deaths in the United States continue to increase in 2015," CDC.gov/drugoverdose/epidemic/index.html, 2017

***"Physicians’ progress to reverse the nation’s opioid epidemic," American Medical Association, 2017

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**Value:** Health care transformation and value-based care models focusing on populations can improve the quality of care at a lower cost.

### Value-based care

- The financial incentives in the Medicare Access and CHIP Reauthorization Act will accelerate the transition to **alternative payment models** not only in the public sector, but also in the private sector.

- **Value-based insurance design** will speed patients’ understanding of the variation in cost and quality of services among providers.

- Providers need the **infrastructure to monitor their quality and financial performance** in near-real time, so they can afford to take on risk. Currently, many providers do not have the information they need to manage that risk successfully.


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### Analytics and quality

Global hospital expenditures on analytics are anticipated to reach **$18.7 billion** by 2020, up from **$5.8 billion** in 2015, as hospitals focus on quality and cost reduction.


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### Non-value added treatments

Excessive testing and treatment **costs $200 billion annually.** This overly aggressive testing can also harm patients, generating mistakes and injuries believed to cause **30,000 deaths** each year.


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### Health care leaders’ perspective

66% say their organizations are fully committed and underway with the transition to value-based care or have experimental or pilot programs.

65% of CEOs view shared-risk models as an opportunity.

*Annual Industry Outlook: The Road to Value-Based Care," HealthLeaders Media, January/February 2017
Mental health issues continue

- Only **41% of adults** in the U.S. with a mental health condition received mental health services in the past year.

- **African-Americans and Hispanic-Americans** used mental health services at about one-half the rate of Caucasian-Americans and at about one-third the rate of Asian-Americans.

- Serious mental illness costs America $193.2 billion in lost earnings per year.

"Mental Health By the Numbers," National Alliance on Mental Illness – www.nami.org, 2017

A critical need exists to elevate the discussion about workforce planning and development to ensure it becomes a standing, rather than crisis-driven, component of comprehensive strategic planning for hospitals and health systems.

The Imperative for Strategic Workforce Planning and Development — AHA

**One in five adults in the U.S.**

- **43.8 million, or 18.5%** — experiences MENTAL ILLNESS in a given year.

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Telemedicine’s rapid growth

- **78%** of consumers say they would be interested in receiving health care virtually some or most of the time.

- **35%** of employers offer telemedicine services on-site, which is expected to surpass 47% in the coming year. The global telemedicine market is expected to grow at a compound annual rate of **14.3%**, more than doubling it from 2014 to 2020.

- Remote monitoring and other technology-enabled care delivered at or near a patient’s home will become standard practice in the foreseeable future. Health systems that cannot provide such care will be at a competitive disadvantage.

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**A workforce shortage in behavioral health**

- There is one licensed psychiatrist for every 30,000 people in the U.S., with a projected 10% decrease in the clinician population over the next decade.*

- **85% of federally designated behavioral health professional shortage areas are in rural locations.**

- Between 2004 and 2014, the number of telemental health visits by rural beneficiaries grew on average 45.1% annually, according to an analysis of Medicare fee-for-service claims.***

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**26.9 million** virtual doctor consultations are predicted by 2020, up from 16.6 million in 2015.*

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* "Telehealth Providers Make a Play for Online Psychiatry Services," Eric Wicklund, mHealth Intelligence, Sept. 20, 2016


*** "Rapid Growth In Mental Health Telemedicine Use Among Rural Medicare Beneficiaries: Wide Variation Across States," Ateev Mehrotra, et al., Health Affairs 36, no.5 (2017):909-917

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* "Are You Meeting the Rising Demand for Virtual Care? Get the Facts," Carenet Healthcare Services, April 25, 2017

** "2017 Healthcare Talent Scan," American Hospital Association, 2017

Coordination: Seamless care propelled by teams, technology, innovation and data

Better care coordination will organize patient care activities and information in an efficient and effective manner to achieve safer care with better outcomes. Teams, technology, data and innovation will spur the advancement of care coordination throughout the continuum of the delivery system. Clinical integration is a way to provide more efficient, coordinated care, decrease costs and expand the population served by high quality medical services.

Data and clinical decision-making

- The volume of electronic health care data doubles every 24 months.
- A physician would need to spend 29 hours each workday to remain current with the latest medical literature.
- Although this massive amount of health care data is brimming with insights, organizations are struggling to unlock its full value.
- Leaders will need to adopt sophisticated systems that support and enhance decision-making in clinical settings and that enable success in risk-based payment arrangements.

TeamSTEPPS® shows results

TeamSTEPPS® is an evidence-based set of teamwork tools aimed at optimizing patient outcomes by improving communication and teamwork skills among health care professionals. After implementing a discharge intervention incorporating TeamSTEPPS® principles:

- **Length of stay** was reduced, providing cost savings to the hospital.
- **Patient satisfaction** improved.
- **Readmission rates** improved.


Data and clinical decision-making

- **Electronic health records**
  - The proprietary nature and standards for electronic health records likely will diminish, as field pressure opens up data repositories and personal data become more accessible.
  - **2004** — one in five physicians used an electronic health record; today — nine in 10 physicians.


Physician practice consolidation

The trend toward consolidation of physician practices in recent decades is accelerating. The proportion of physicians in groups of nine or fewer dropped from 40.1% in 2013 to 35.3% in 2015, while the proportion of those in groups of 100 or more increased from 29.6% to 35.1% during the same period.


Hospital field realignment

Between 2010 and 2015, the number of announced hospital mergers and acquisitions increased by 70%. This recent history, along with future demands, suggests that consolidations will continue. More affiliations between traditional and nontraditional organizations will take place. Hospitals get rapid access to new capabilities, while nontraditional provider organizations get rapid access to larger patient populations.*

**Recent hospital mergers have:***

- Decreased costs — 1.5% reduction in annual operating expenses as acquired hospitals.
- Decreased capital and operating costs.
- Improved clinical standardization.
- Improved outcomes for patients and reduced readmission rates.


** "Hospital Merger Benefits: Views from Hospital Leaders and Econometric Analysis,” Monica Noether, Ph.D., and Sean May, Ph.D., Charles River Associates, January 2017
A by-the-numbers look at the state of healthcare hiring, and how supply and demand vary across markets.

154 million
total job candidates in the US

13.59%
of total job candidates are in healthcare

104
the number of candidates per every healthcare job opening

Top 10 Most In Demand Positions

(Based on volume of jobs advertised in healthcare practitioners and technical occupations)

1. Registered Nurse
2. Physical Therapist
3. Occupational Therapist
4. Licensed Practical Nurse
5. Speech Language Pathologist
6. Pharmacy Technician
7. Registered Nurse Intensive Care Unit
8. Nurse
9. Registered Nurse Medical Surgical
10. Travel Registered Nurse

Markets where it’s easiest to fill positions
1. Port Lavaca, TX
2. Baton Rouge, LA
3. Cleveland-Elynia, OH
4. McAllen-Edinburg-Mission, TX
5. Huntsville, AL

Markets where it’s hardest to fill positions
1. Logan, WV
2. Wisconsin Rapids-Marshfield, WI
3. Winnemucca, NV
4. Lake Havasu City - Kingman, AZ
5. Boise City, ID

1 – CEB TalentNeuronTM, Gartner, Inc. www.data accessed February 6, 2018


1.2 – Candidates per Job Opening is the relative rate which compares the available potential candidates with the total number of job openings nationally. This shows how much demand pressure a recruiter is likely to feel in terms of filling this role nationally.

1.3 – Skills in Demand provide a real-time view of tools, technologies and certifications currently in demand by employers.
POSITION SNAPSHOT: Registered Nurses (RNs)

2,804,000
# Candidates in specialty

10
# Candidates per every job opening in specialty

38
# Days - Average job posting duration

Top 10 Most In Demand Skills — Registered Nurses (RNs)

(Based on volume of jobs advertised in healthcare practitioners and technical occupations)

1 Pediatrics
2 Critical care
3 Medical-Surgical Nursing
4 Behavioral Health
5 Geriatrics
6 Emergency Room
7 Patient Electronic Medical Record (EMR)
8 Quality Assurance (QA)
9 Medicaid
10 Cath lab

Markets where it’s easiest to fill positions
1 Othello, WA
2 Holland, MI
3 Huntsville, AL
4 Weirton-Steubenville, WV
5 Enterprise, AL

Markets where it’s hardest to fill positions
1 Winnemucca, NV
2 Boise City, ID
3 Wisconsin Rapids-Marshfield, WI
4 Lake Havasu City-Kingman, AZ
5 Roanoke, VA

1 – CEB TalentNeuronTM, Gartner, Inc. www.data accessed February 6, 2018
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POSITION SNAPSHOT: **Family Practitioners**

**133,000**
# Candidates in specialty

**3**
# Candidates per every job opening in specialty

**43**
# Days - Average job posting duration

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**Top 10 Most In Demand Skills — Family and General Practitioner**

*(Based on volume of jobs advertised in healthcare practitioners and technical occupations)*

1. Patient Electronic Medical Record (EMR)
2. Pediatrics
3. Geriatrics
4. Epic Software
5. Behavioral health
6. Private Practice
7. Electronic Medical Record (EMR) Systems
8. Drug testing
9. Emergency Room
10. Electronic Health Record

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**Markets where it's easiest to fill positions**

1. St Louis, MO
2. Oklahoma City, OK
3. Grand Rapids-Wyoming, MI
4. Urban Honolulu, HI
5. Miami-Fort Lauderdale-West Palm Beach, FL

**Markets where it's hardest to fill positions**

1. Logan, WV
2. Olympia-Tumwater, WA
3. Junction City, KS
4. Corpus Christi, TX
5. Wisconsin Rapids-Marshfield, WI
**POSITION SNAPSHOT:** Nurse Practitioners

- **144,000**
  - # Candidates in specialty
- **14**
  - # Candidates per every job opening in specialty
- **38**
  - # Days - Average job posting duration

**Top 10 Most In Demand Skills — Nurse Practitioner**

*(Based on volume of jobs advertised in healthcare practitioners and technical occupations)*

1. Geriatrics
2. Patient Electronic Medical Record (EMR)
3. Medicaid
4. Pediatrics
5. Behavioral Health
6. Microsoft office
7. Critical care
8. Quality Assurance (QA)
9. Epic Software
10. Utilization review

**Markets where it's easiest to fill positions**

1. Laredo, TX
2. Jacksonville, FL
3. Springfield, IL
4. Knoxville, TN
5. Grand Rapids-Wyoming, MI

**Markets where it's hardest to fill positions**

1. Duluth, MN
2. Merced, CA
3. Fayetteville, NC
4. Salinas, CA
5. Prescott, AZ

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1 – CEB TalentNeuron™, Gartner, Inc. www.data accessed February 6, 2018


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### Top 10 Most In Demand Skills — Physician Assistant

*(Based on volume of jobs advertised in healthcare practitioners and technical occupations)*

1. Pediatrics
2. Patient Electronic Medical Record (EMR)
3. Critical Care
4. Geriatrics
5. Epic software
6. Behavioral health
7. Quality Assurance (QA)
8. Drug testing
9. Electrocardiogram
10. Electronic Health Record (HER)

#### Markets where it's easiest to fill positions

1. Louisville/Jefferson County, KY
2. Charleston-North Charleston, SC
3. Flint, MI
4. Baton Rouge, LA
5. Hickory-Lenoir-Morganton, NC

#### Markets where it's hardest to fill positions

1. Las Cruces, NM
2. Wisconsin Rapids-Marshfield, WI
3. Green Bay, WI
4. Lexington-Fayette, KY
5. Pinehurst-Southern Pines, NC
POSITION SNAPSHOT: Psychiatrists

32,000
# Candidates in specialty

2
# Candidates per every job opening in specialty

48
# Days - Average job posting duration

Top 10 Most In Demand Skills — Psychiatrists

(Based on volume of jobs advertised in healthcare practitioners and technical occupations)

1 Behavioral health
2 Geriatrics
3 Patient Electronic Medical Record (EMR)
4 Pediatrics
5 Drug testing
6 Crisis intervention techniques
7 Epic software
8 Medicaid
9 Private Practice
10 Psychiatric assessment

Markets where it’s easiest to fill positions
1 Reno, NV
2 Jackson, MS
3 Los Angeles-Long Beach - Anaheim, CA
4 Providence-Warwick, RI
5 Cincinnati, OH

Markets where it’s hardest to fill positions
1 Oxford, NC
2 Portland-South Portland, ME
3 Modesto, CA
4 New Orleans-Metairie, LA
5 Worcester, MA

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POSITION SNAPSHOT: Physical Therapist

225,000
# Candidates in specialty

9
# Candidates per every job opening in specialty

41
# Days - Average job posting duration

Top 10 Most In Demand Skills — Physical Therapist

(Based on volume of jobs advertised in healthcare practitioners and technical occupations)

1. Geriatrics
2. Pediatrics
3. Orthotics
4. Athletic Training
5. Patient EMR
6. Acute Rehabilitation
7. Canes
8. Stretchers
9. Desktop Computers
10. Quality Assurance

Markets where it's easiest to fill positions
1. Utica-Rome, NY
2. Syracuse, NY
3. Youngstown-Warren-Boardman, OH
4. Pittsburgh, PA
5. Grand Rapids-Wyoming, MI

Markets where it's hardest to fill positions
1. Lake Havasu City-Kingman, AZ
2. Enterprise, AL
3. Yakima, WA
4. Wisconsin Rapids-Marshfield, WI
5. Logan, WV
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As a co-founder of the National Healthcare Career Network (NHCN), we have relationships with hundreds of specialty association career sites that attract highly qualified, hard-to-find talent, including nurses, executives, allied health and more. Our reach means that with one posting, your job will be automatically distributed to relevant association job boards, and you’ll have immediate access to a resume database that contains information on relevant association members who represent the best in their field.

We have helped nearly 2,000 healthcare employers save time and money with this approach. Let us know how we can help you! Visit healthcareercenter.com to learn more or contact us at careercentersales@aha.org to get started.