



The health care workforce landscape today: 10 key trends

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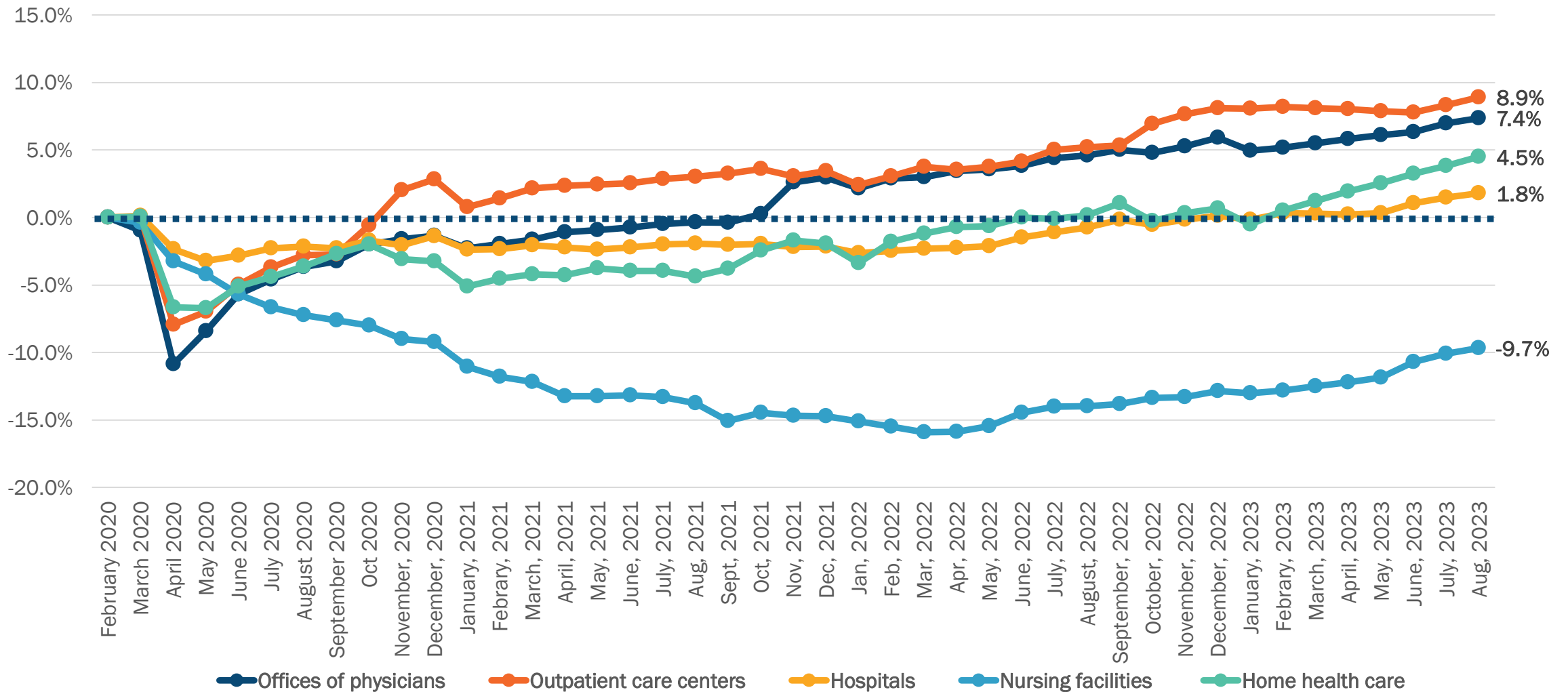
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Total employment in nursing facilities remains 10% below the pre-pandemic level. Ambulatory care settings are growing faster than inpatient.



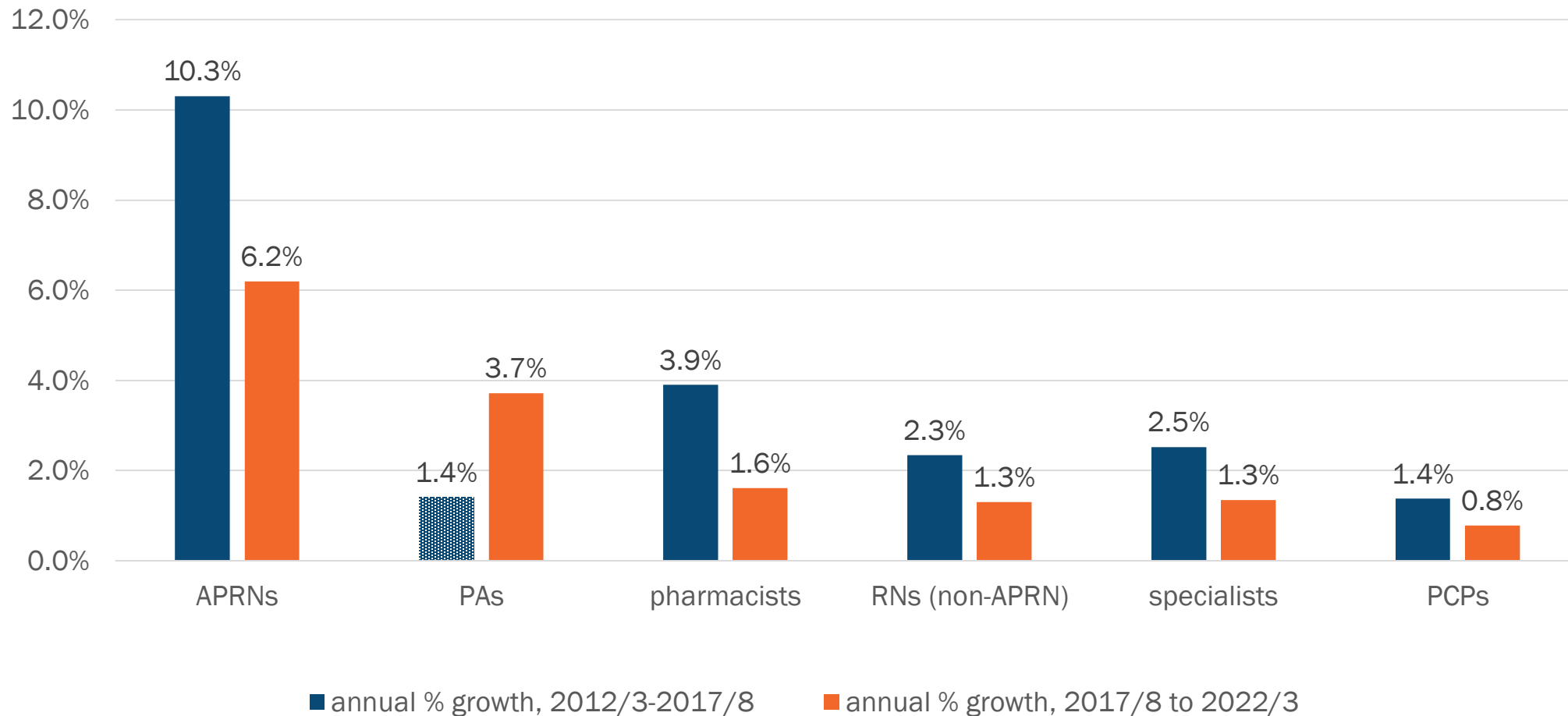
Cumulative employment growth by setting (all workers) from Feb, 2020



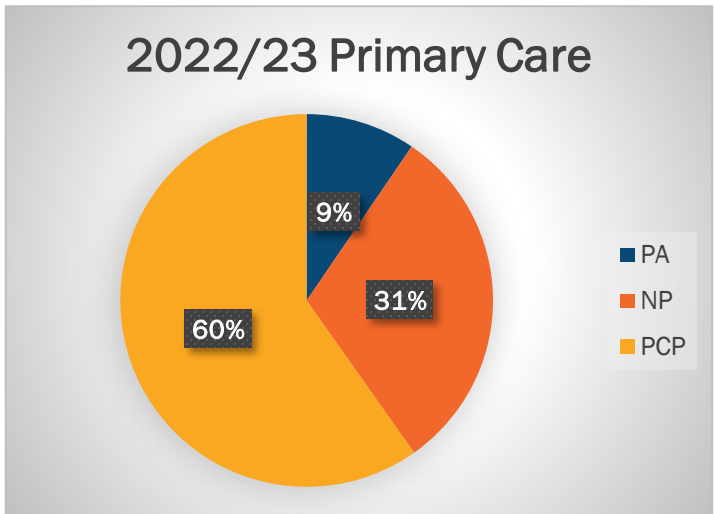
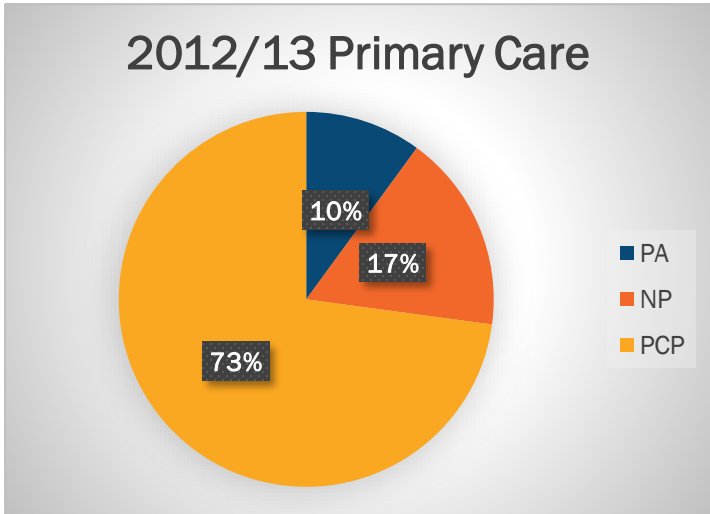
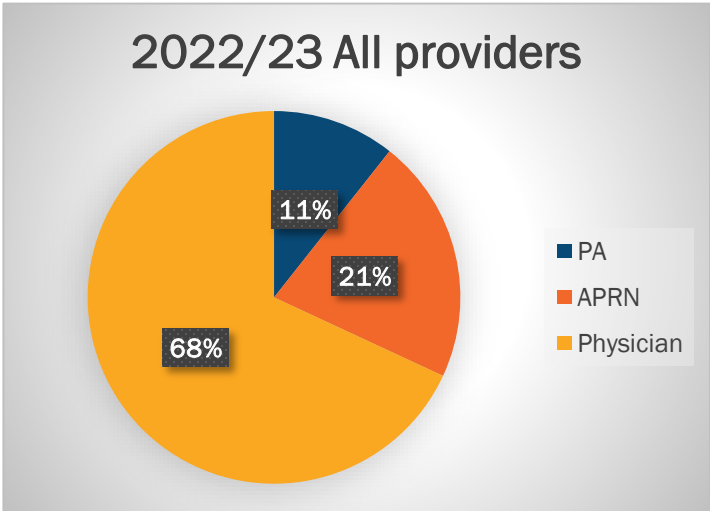
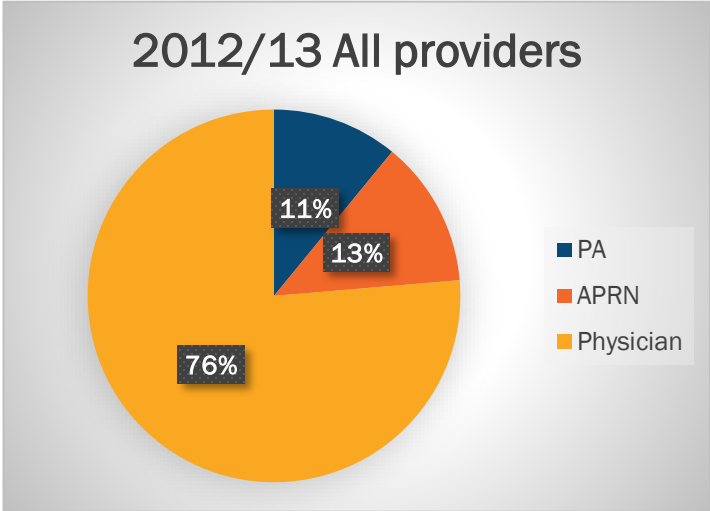
**The number of APRNs is growing 7 times faster than the number of PCPs.
All workforces continue to grow, growth has slowed over the past 5 years.**



Annual growth rates (FTEs)



Differential growth rates have led to a provider mix with fewer physicians.

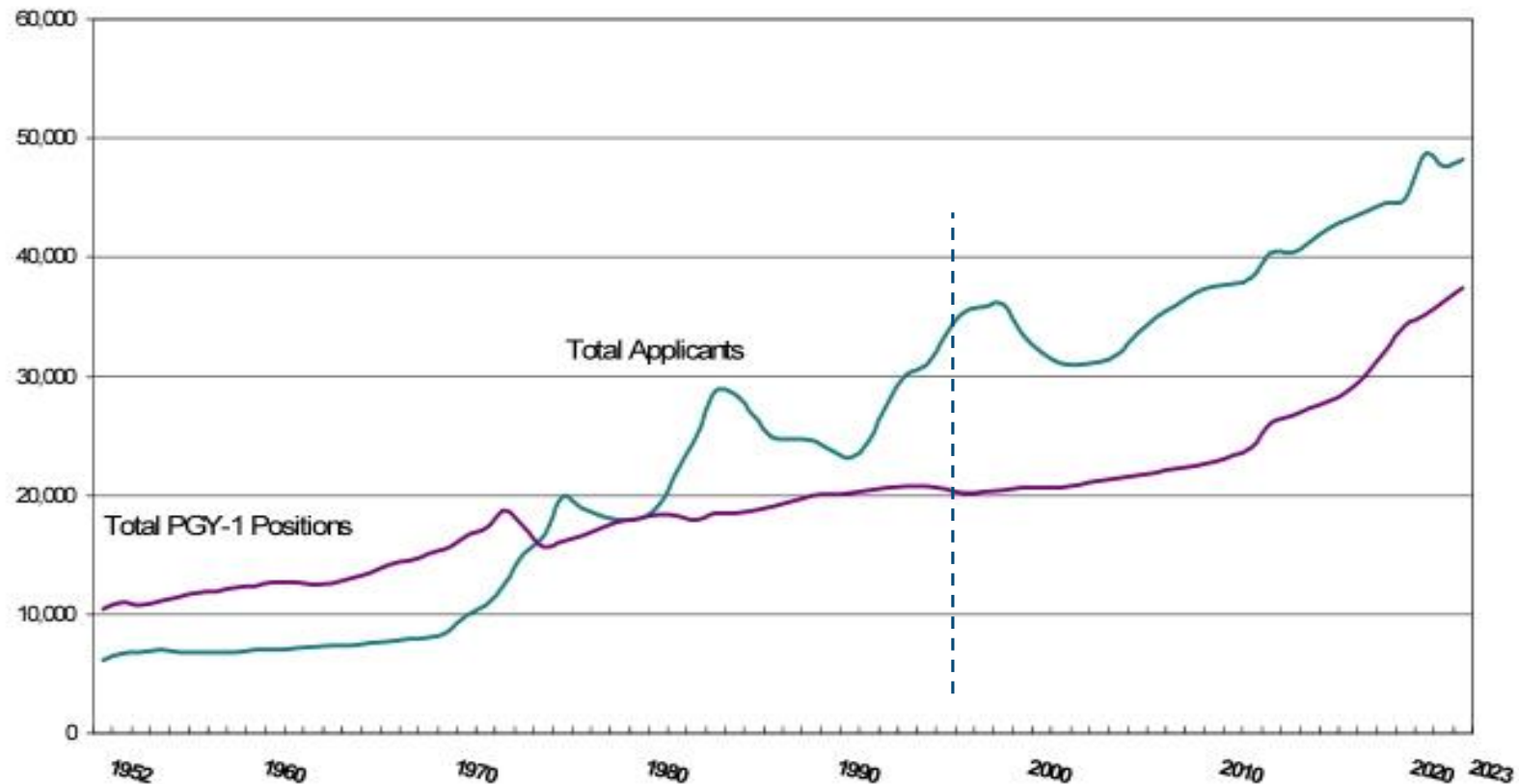


Notes: Assumes 1/3 of PAs and 60% of NPs are in primary care.
 Sources: Current Population Survey (basic monthly files) and AMA Masterfile as reported by AAMC State Workforce Profiles. Physician data are extrapolated for 2022 and 2023.

The Medicare 1997 cap on funding of residency slots does not appear to be a big factor in physician supply

Figure 1

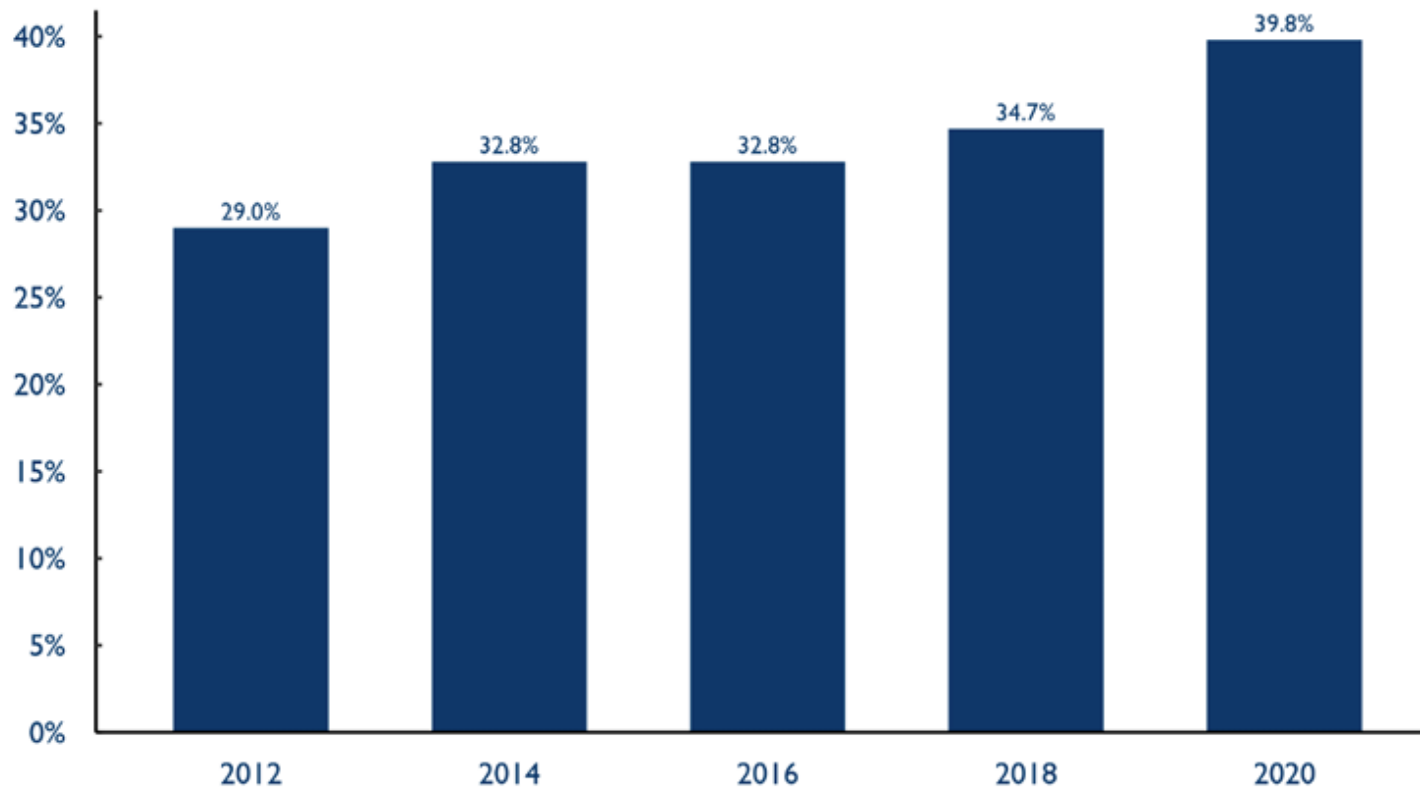
Applicants and 1st Year Positions in the Match, 1952 - 2023



An increasing proportion of physicians work for practices owned by hospitals or health systems



Exhibit 2. Percentage of physicians working directly for a hospital or a practice at least partially owned by a hospital or health system, 2012-2020



Source: American Medical Association's Physician Practice Benchmark Survey, 2021.

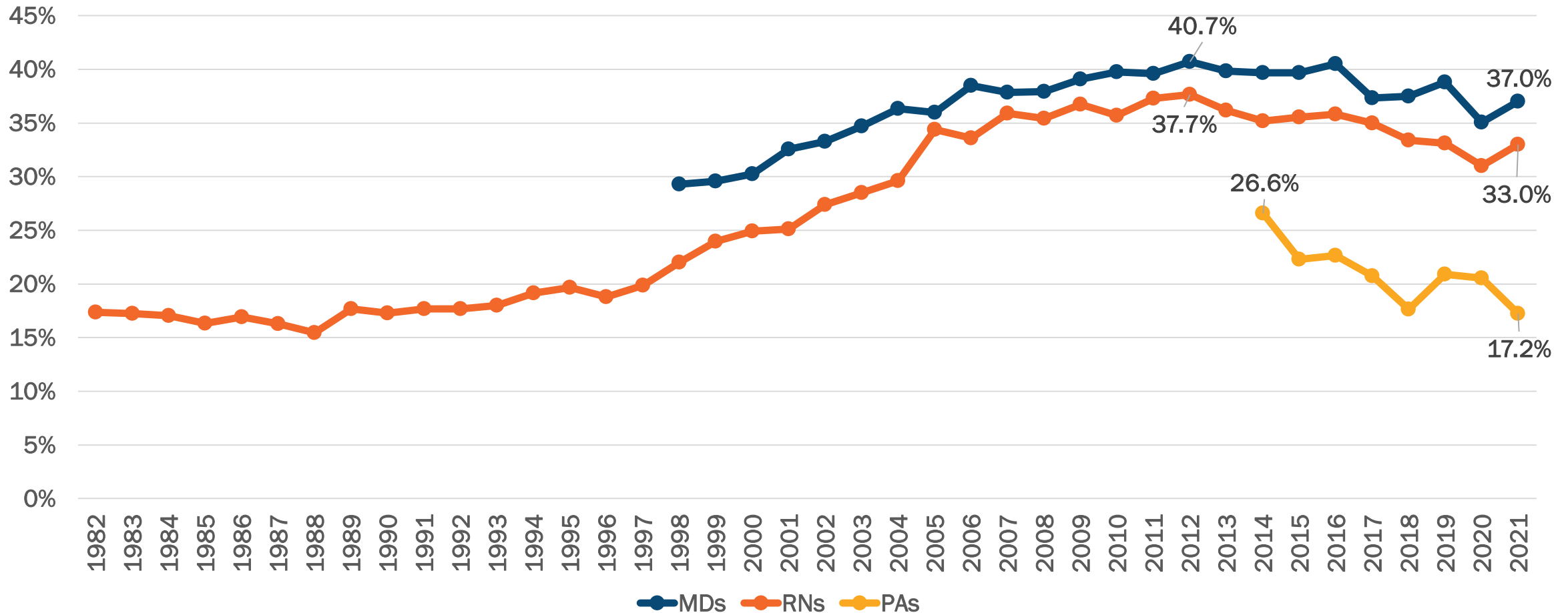
USC Schaeffer

BROOKINGS

The physician and nursing workforces are no longer aging, and haven't been for a while.



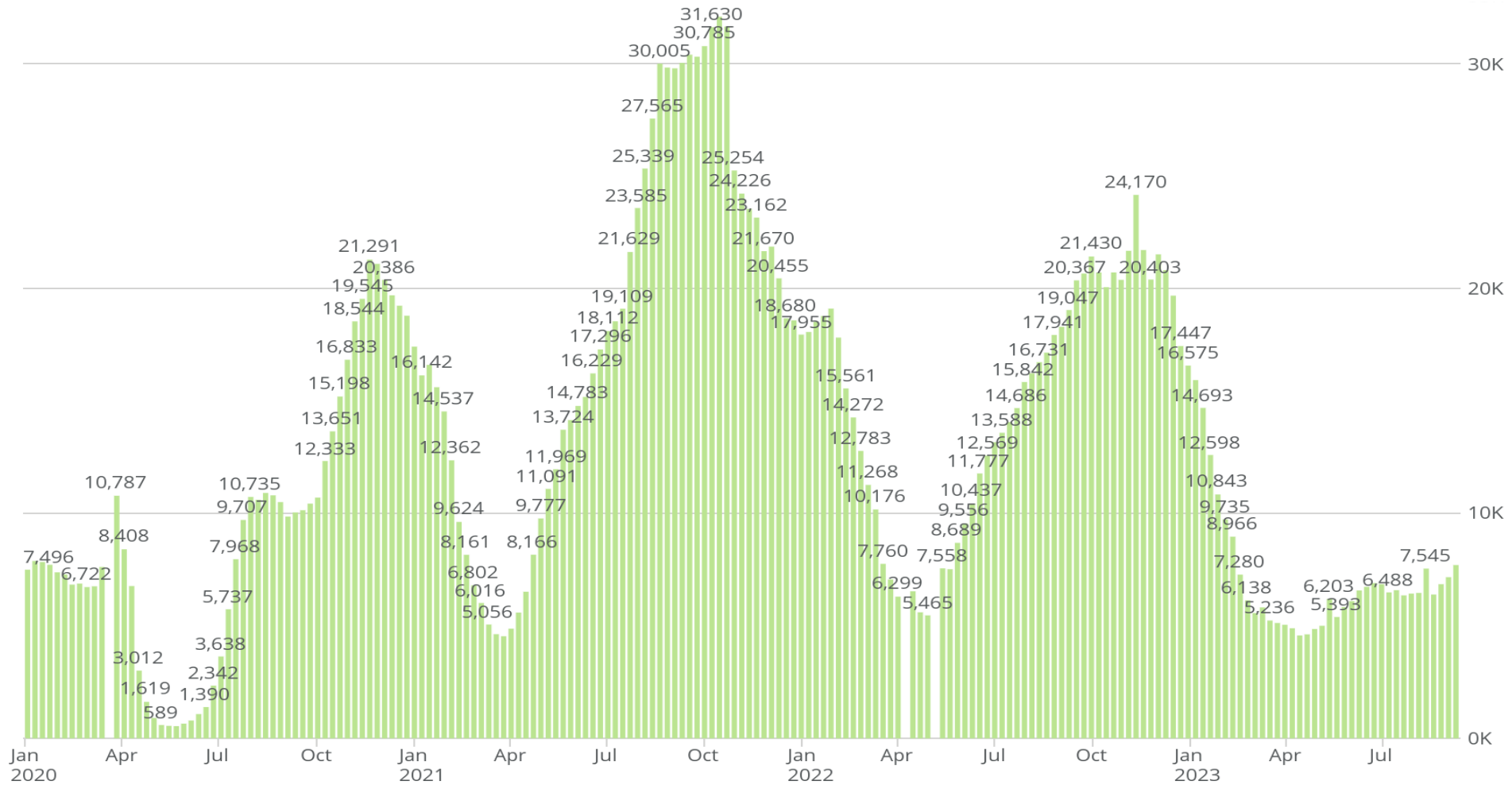
Percentage of providers age 50+



The travel nursing frenzy has largely died down



Number of weekly travel nurse job listings as compiled by SimpliFi, 2020-2023.

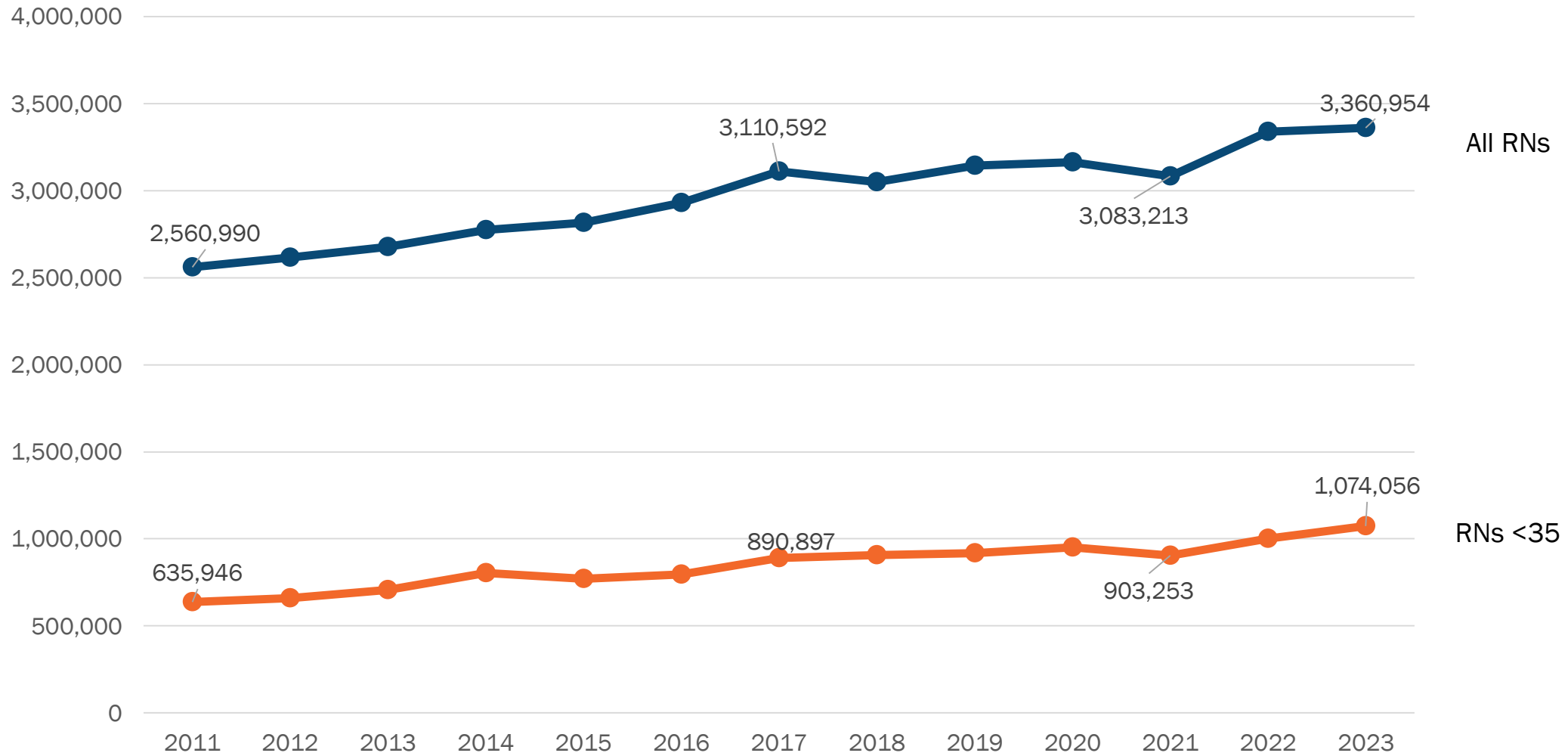


6% of RNs reported being travel nurses in 2022

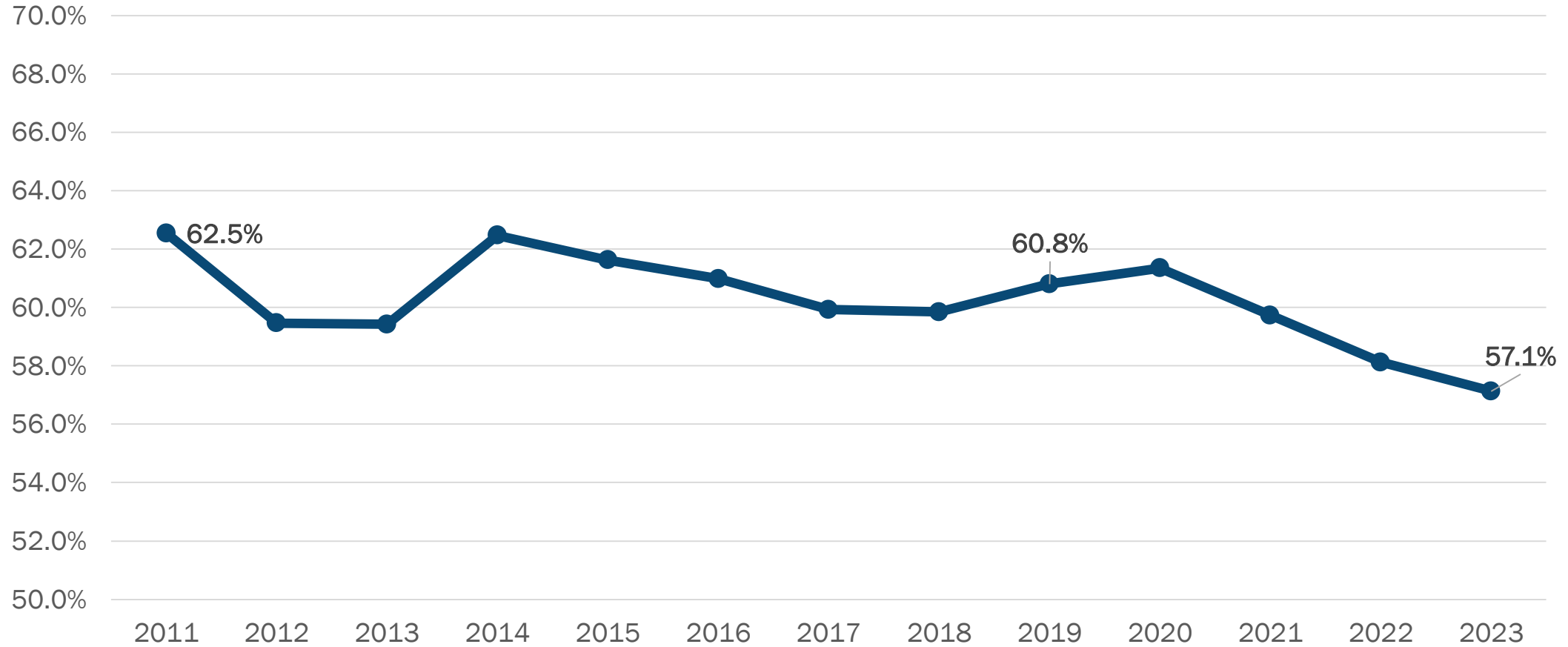
Job Quantity

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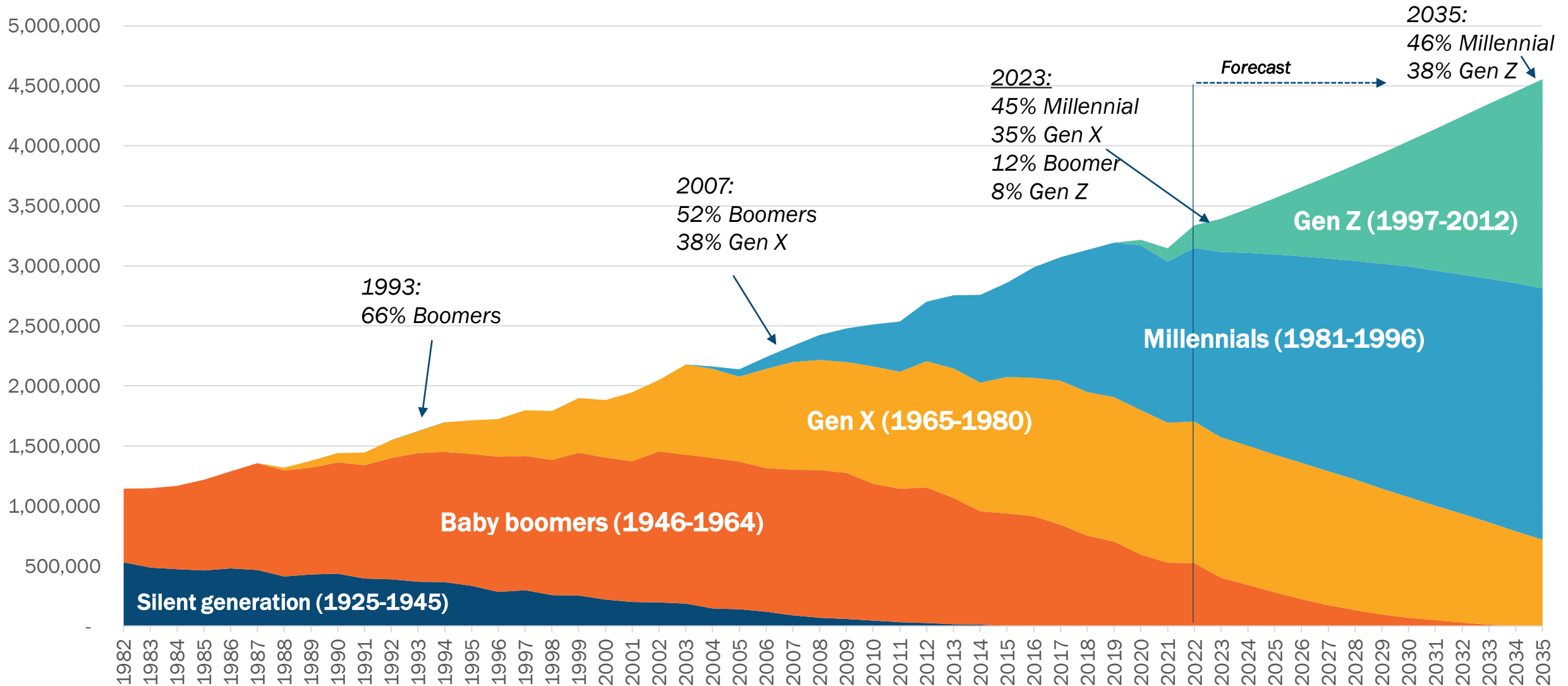
The nursing workforce has rebounded in total employment post-pandemic



The percentage of RNs working in the hospital is an an all-time low



Almost half of all RNs will be Millennials for the next 10 years



Data from the Current Population Survey, the American Community Survey, and forecast model (Auerbach, Buerhaus, Staiger)