



2008 Profile: Oregon's Health Care Workforce

Compiled by the Oregon Healthcare Workforce Institute (OHWI)

In this profile: Statewide industry size, employment settings, fastest growing occupations, and vacancies.

June 2008

Quick Facts

- Not including government-employed health care workers, Oregon's health care industry makes up 9% of the state's labor market.
- Even with a slow-down in the economy, health care employment is forecast to be a major growth industry for the state.
- Most of Oregon's health care workers are employed in ambulatory care settings. Employment in these settings increased by 32% between 1997 and 2007.
- Registered Nurses have by far the largest anticipated number of job openings over the next eight years due to job growth (6,933) and job replacements (6,582).
- Oregon's fastest growing health care occupations by percentage of new jobs are Psychiatric Technicians (62%) and Physician Assistants (58%).

Data Notes

Unless otherwise stated, data for this Profile comes from the Oregon Employment Department's:

- 2006-2016 occupational employment projections based on the annual employer survey and published November 2007.
- Current Employment Statistics monthly survey.

Data on health care employment should be considered as conservative estimates.

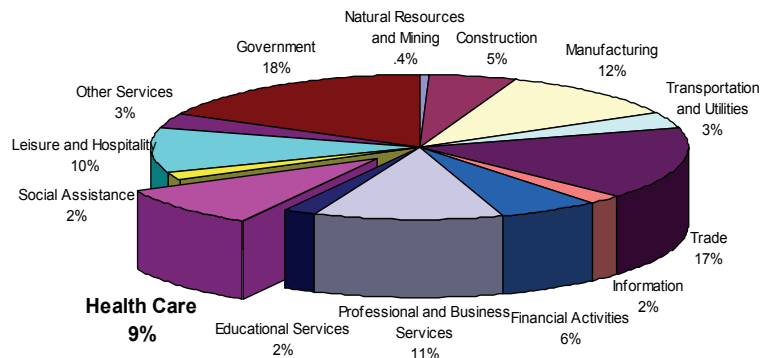
- Health care workers in federal, state, local and tribal governments are included in the government labor industry data.
- Health care providers who own their own practices are considered self-employed.

Health Care is a Major Sector in State's Labor Market

With over 158,400 jobs, the health care industry is a major player in Oregon's economy. Health care employment makes up 9 percent of Oregon's labor market, in line behind all government sector employment (18%), trade (17%), manufacturing (12%), professional and business services (11%) and leisure and hospitality (10%).

Health care is predicted to be a major growth industry for the state. The combination of Oregon's projected 13% increase in population and 33% increase in the 65+ population over a ten-year period, advancements in medical technology and an aging workforce point to the need for new health care workers to fill new jobs and to replace those who will be retiring. Between

Oregon's Labor Market



Source: Oregon Employment Department, March 2008

March 2007 and March 2008, Oregon's health care labor market grew with the addition of 5,600 new jobs. Even with a slow-down in the economy, the number of health care jobs overall is predicted to grow nearly 27% by 2016.

Most Health Care Workers in Ambulatory Care Settings

The variety of settings in which health care is delivered gives the industry a distinct nature. Consumer-demand, reimbursement policies, public policies and regulations, technology and advances in clinical practice are some of the drivers that influence the setting in which health care is delivered.

Most health care is delivered in out-patient settings. The Centers for Disease Control and Prevention's National

Center for Health Statistics report on ambulatory medical care utilization estimated that on average, U.S. residents made four visits annually to physicians' offices, hospital out-patient departments and hospital emergency departments in 2005.

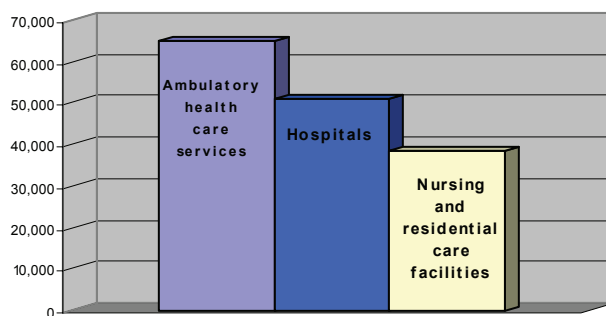
Most of Oregon's health care workers are located in ambulatory or out-patient settings, such as physician and dental offices, out-patient diagnostic centers and medical laboratories. In 2007, the average annual employment for ambulatory care settings was 64,700, which is a 32% increase in jobs from 1997.

Oregon's community hospitals had an average annual employment of 51,100 health care workers in 2007, increasing 28% in the number of new jobs since 1997.

The average annual employment in skilled nursing facilities and residential care facilities grew by 32% between 1997 and 2007, employing on average 38,500 health care workers in 2007.

Employment Settings

Annual Average Employment 2007



Source: Oregon Employment Department

Quick Facts

- The United States Census Bureau names Oregon as the 11th fastest growing state in the nation.
- According to PSU's Population Research Center, Oregon added 54,950 residents between July 2006 and July 2007.
- The Oregon Office of Economic Analysis expects Oregon to grow at this same pace for the following five years when it hits the 4 million mark. In-migration accounts for about two-thirds of this growth and the remainder is from births.

OHWI

The Oregon Healthcare Workforce Institute (OHWI) exists to coordinate and advance a comprehensive statewide response to the growing health care workforce shortage.

Developing out of an initiative from the Governor's office and launched as an independent non-profit in April 2006, OHWI is sustained by dedicated healthcare professionals from the public and private sectors.

OHWI is unique in the state because it is the one entity that is neutral, well-positioned and specifically created to work with all stakeholders to address the broad realm of health care workforce issues.

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Health Care Jobs Among Fastest Growing Occupations

Health care occupations are among the fastest growing occupations in the U.S. and in Oregon. The Federal Bureau of Labor Statistics' projections (2007) identified 13 health care-related occupations in the top 30 of the nation's fastest growing occupations between 2006-2016. This list includes home health aides (49%), medical assistants (36%), substance abuse and behavioral disorder counselors (34%), physical therapist assistants (32%) and pharmacy technicians (32%).

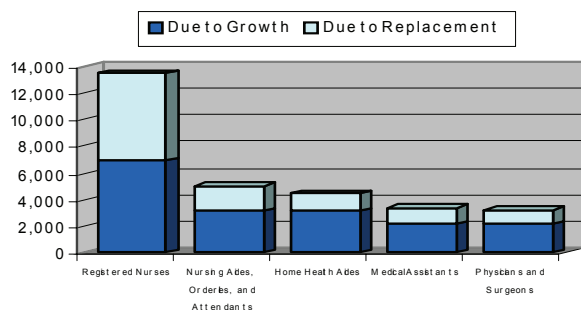
In Oregon, the projected fastest growing health care occupations include psychiatric technicians (62%), physician assistants (58%), psychiatric aides (44%) and diagnostic medical sonographers and ultrasound technologists (39%).

Registered nurses make up the majority of health care workers in the industry. In Oregon, job openings for registered nurses are expected to continue to increase due to the projected growth in new jobs and job openings created through replacement of current

Oregon's Fastest Growing Healthcare Occupations	Percent Increase 2006-2016
Psychiatric Technicians	62%
Physician Assistants	58%
Psychiatric Aides	44%
Diagnostic Medical Sonographers & Ultrasound Technologists	39%
Optometrists	38%
Podiatrists	36%
Medical Assistants	36%
Audiologists	36%
Home Health Aides	36%
Physical Therapist Aides	36%
Physical Therapist Assistants	35%
Physical Therapists	33%
Physicians and Surgeons	32%

Projected Job Openings 2006-2016

Source: Oregon Employment Department



employees. The Oregon Employment Department forecasted a need for over 13,000 nurses between 2006 and 2016 due to new job growth and replacement openings.

Emerging health care occupations, such as health care informatics and medical interpreters, are expected to show job growth in the coming years. However, new health care occupations like these are not yet tracked as specific occupations within health care labor market surveys.

Vacancies in Health Care Occupations Represent Job Opportunities for Oregonians

Job openings for health care occupations are commonplace and many positions are frequently left unfilled for long periods of time. In a 2006 study, the Oregon Employment Department found that mental health counselors had the highest statewide vacancy rate at 27 percent, with more than half of the vacancies left unfilled for over 60 days. That same study reported the vacancy rate for physical therapists at 21 percent with three-quarters of those vacancies remaining open for two months or more.

Vacancy rates vary by region within Oregon. In the OED study, it was reported that the statewide vacancy rate for dental hygienists was at 4%. However, employers in Central Oregon reported a 27% vacancy rate. In the Columbia Gorge, employers reported a 17% vacancy rate for dental hygienists.

The demand for health care workers is expected to increase over the next twenty years and fur-

ther shortages are predicted due to a combination of factors. Major drivers of the demand for more health care workers include the overall population growth and an aging population. Concurrently, the aging health care workforce will be retiring.

The educational capacity to produce new graduates is limited by many factors, including the current shortage of nursing and health profession faculty, the shortage of clinical experience sites, regulatory barriers and the costs of new or expanded programs. Added to this picture is the concurrent aging of faculty and pending retirements.

Many efforts are underway in Oregon to address the health care shortages and expand educational capacity, including the innovative use of technology, distance learning, partnerships among employers, educational institutions and workforce investment boards, and the exploration of alternatives in health care delivery.