Physician Workforce Supply and Demand in Nevada

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October 3, 2017
Overview

• Health workforce demand and supply in Nevada

• Recent GME completion and retention trends in Nevada

• Current physician workforce supply by specialty and county in Nevada and the US
Forces Driving Physician Workforce Demand

Primary Factors
- Population growth and aging
- Reform-related insurance coverage expansions
- GDP and income growth, e.g., Tesla effects

Important, but Secondary Factors
- Population health needs (demand ≠ need)
- Non-physician practitioners, esp. APRNs
- Health care system change, e.g., industry consolidation
- Technological change, e.g., telehealth
Health Care Employment in Nevada
Number of Jobs (Thousands) – 2006 to 2017

Health Care Employment in Las Vegas
Number of Jobs (Thousands) – 2006 to 2017

Demand for Health Professionals in Nevada
Total Health Sector Job Postings – 2014 to 2016

Source: OSI analysis of Burning Glass, Copyright © 2017 Burning Glass Technologies.
Demand for Physicians in Nevada
Job Postings – from 2014 to 2016

Source: OSI analysis of Burning Glass, Copyright © 2017 Burning Glass Technologies.
Projected Demand for Health Care Workers by Industry in Nevada from 2014 to 2024

• Total Health Care and Social Assistance Sector: + 27,991 jobs (+25.1%)
• Ambulatory Care: 13,987 jobs (+30.2%)
  – Offices of physicians: 6,390 jobs (+35.6%)
  – Offices of dentists: 1,052 jobs (+13.3%)
• Hospitals: 4,152 jobs (+12.3%)
• Skilled Nursing Facilities: 3,484 jobs (+27.2%)

Source: Nevada Department of Employment, Training, and Rehabilitation (2016).
“Is there a doctor who accepts Medicaid in the house?”
Physician Workforce Supply in Nevada

• Steady growth in the number of physicians (MD & DO) across most areas of the state
• “Treading water” in the number of licensed physicians and other health professionals per capita (with some important exceptions)
• Severe shortages compounded by an improving economy, ACA-related demand, and an aging health workforce
• Persistent specialty shortages and geographic maldistribution of physicians and providers
Current Physician Workforce Rankings
Number of Active Licensees in Nevada per 100,000 Population

• Physicians, MDs – 47th among U.S. states
• Physicians, DOs – 18th
• Physicians, MD & DO – 48th
• Patient Care Physicians – 48th
• Primary Care Physicians – 50th
• Residents & Fellows – 47th
• Residents & Fellows in Primary Care – 48th

Source: Area Health Research File (AHRF) (2016).
Current Physician Workforce Rankings
Number of Active Licensees in Nevada per 100,000 Population

- Anesthesiology – 23rd
- General and Family Practitioners – 47th
- General Surgeons – 50th
- Internal Medicine – 30th
- Obstetricians and Gynecologists – 47th
- Orthopedic Surgeons – 51st
- Pediatricians – 48th
- Psychiatry – 47th

Source: Area Health Research File (AHRF) (2016).
Number of Licensed Allopathic Physicians (MDs) per 100,000 Population in Nevada – 2006 to 2016

Source: OSI analysis of unpublished data from Nevada State Board of Medical Examiners (2017).
Primary Care Health Professional Shortage Areas (HPSAs) – 2017

- 982,117 Nevadans reside in a primary care HPSA (33.7%)

- 836,216 urban residents in Nevada (31.8% of urban residents) live in a primary care HPSA, including 631,812 residents of Clark County

- 165,412 rural residents (49.8% of rural residents) live in a primary care HPSA

- 9 single-county primary care HPSAs
Primary Medical Care Health Professional Shortage Areas (HPSAs) in Metropolitan Clark County

Mental Health Professional Shortage Areas (HPSAs) – 2017

• 1.5 million Nevadans reside in a mental HPSA (53.3%)

• 1.2 million urban residents in Nevada (48.1% of urban residents) live in a mental HPSA, including 736,908 residents of Clark County

• 286,251 rural residents (100.0% of rural residents) live in a mental HPSA

• 16 single-county mental HPSAs
Mental Health Professional Shortage Areas (HPSAs) in Metropolitan Clark County

"I'll go shop around for a doctor."
UNSOM GME Exit Survey

• Annual survey of physicians completing UNSOM residency and fellowship programs since 2004
• On-line, 29-item questionnaire administered from May 1 to 31 each year
• 90%+ response rate (93% in 2017)
• Historical and trend data updated via data from the Nevada State Board of Medical Examiners
• Future surveys will be administered to UNR, UNLV, and non-NSHE GME program graduates
Retention of Physicians Completing UNSOM GME Programs – 2017

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<thead>
<tr>
<th></th>
<th>Beginning Practice</th>
<th>Continuing GME or Other</th>
<th>Total</th>
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<tbody>
<tr>
<td>Remaining in Nevada</td>
<td>32 (26.7%)</td>
<td>4 (3.3%)</td>
<td>36 (30.0%)</td>
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<tr>
<td>Leaving Nevada</td>
<td>47 (39.2%)</td>
<td>37 (30.8%)</td>
<td>84 (70.0%)</td>
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<tr>
<td>Total</td>
<td>79 (65.8%)</td>
<td>41 (34.2%)</td>
<td>120 (100.0%)</td>
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School of Medicine GME Graduates - 2008 to 2017
Number of Graduates from Southern Programs

School of Medicine GME Retention - 2008 to 2017
Number of Southern Program Graduates Remaining in Nevada

School of Medicine GME Retention - 2008 to 2017
Percent of Southern Program Graduates Remaining in Nevada

School of Medicine GME Graduates - 2008 to 2017
Number of Graduates from Northern Programs

School of Medicine GME Retention - 2008 to 2017
Number of Northern Program Graduates Remaining in Nevada

School of Medicine GME Retention - 2008 to 2017
Percent of Northern Program Graduates Remaining in Nevada

## Retention of Physicians Completing UNSOM GME Programs in Nevada – 2008 to 2017

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<tr>
<td>Remaining in Nevada</td>
<td>409 (46.1%)</td>
<td>30 (3.4%)</td>
<td>439 (49.5%)</td>
</tr>
<tr>
<td>Leaving Nevada</td>
<td>307 (34.6%)</td>
<td>141 (15.9%)</td>
<td>448 (50.5%)</td>
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<tr>
<td>Total</td>
<td>716 (80.7%)</td>
<td>171 (19.3%)</td>
<td>887 (100.0%)</td>
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Current Physician Workforce Supply by Specialty and County in Nevada

• Per capita counts versus State average (Table 1)
  – Clark County: 11 of 36 specialties above state average, including pediatrics and internal medicine
  – Washoe County: 32 of 36 above state average

• Per capita counts versus US average (Table 2)
  – Clark County: Only 2 of 36 above US average
  – Washoe County: 18 of 36 above US average
  – Nevada: Basically all specialties are below US average
OSI Health Workforce Research and Policy Program

• *Health Workforce Supply in Nevada* – regional and statewide supply analysis
• Annual survey of physicians completing UNSOM graduate medical education programs
• *Physician Workforce in Nevada* and *Nursing Workforce in Nevada* reports
• Ongoing survey of incoming and graduating nursing students in NSHE nursing programs
OSI Health Workforce Research and Policy Program

http://med.unr.edu/statewide/reports