

HEALTHCARE RECRUITING SNAPSHOT

A quarterly report by Health eCareers

Q3
2016



○ ○ ○ ○ The healthcare industry's career hub.



HEALTH
eCAREERS™

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Executive Summary

In 2016, the nation has added an average of 178,000 jobs a month across all industries, down from 229,000 in 2015. But there is good news for U.S. healthcare workers: there are still plenty of jobs for the taking. Though overall hiring appears to be slowing in the second half of the year, data from the Bureau of Labor Statistics (BLS) shows healthcare employers added 43,000 new positions in July, 14,000 in August, and 33,000 in September. With 96,000 new opportunities in total, healthcare remains a dominant driver in overall U.S. job growth.

A similar trend was found in Health eCareers' Q3 recruiting data. Close to 3,000 employers used the site to advertise 54,265 healthcare opportunities. While these totals are down, similar to the market dip, roles for physicians / surgeons and nurses were still plentiful and continued to account for the largest percentage of jobs posted.

KEY FINDINGS

Q3 2016 Job Postings



- 1% Academics / Research
- 3% Administration / Executive
- 3% Allied Health
- 1% Counseling and Social Services
- 1% Dietetics / Nutrition
- 0% Healthcare IT
- 7% Nurse Practitioner
- 18% Nursing
- 1% Pharmacy
- 55% Physician / Surgeon
- 5% Physician Assistant
- 1% Radiologic Technologist / Medical Imaging
- 3% Therapy

General Findings

Hiring in many healthcare areas slowed slightly in Q3, though several positions saw an increase in the number of jobs posted on Health eCareers when compared to the previous year. The largest increases were seen in physician / surgeon, nursing and therapy.

Top 4 Specialties

by percentage of total job postings in Q3 2016

- 55% Physician / Surgeon
- 18% Nursing
- 7% Nurse Practitioner
- 5% Physician Assistant

10

Top Ten States

Based on Number of Postings

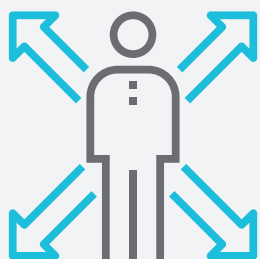
1. California
2. Texas
3. Pennsylvania
4. Florida
5. New York
6. Washington
7. Illinois
8. Virginia
9. Arizona
10. Georgia

Physicians / Surgeons

According to the results of The Physicians Foundation biannual survey, **80% of physicians are overextended or at capacity and unable to see additional patients.** As a result of this continued burden, only 14% of the responding physicians have the time they need to provide the highest standard of care, 49% often or always experience feelings of burn-out, and 48% plan to cut back their hours, retire, or switch to a non-clinical job or concierge medicine within the next one to three years (an increase from 44% in 2014).

Physicians / Surgeons:

Q3 2016 Job Postings



29,985
postings

55% of total Q3 2016
job postings on
Health eCareers

One of the largest surveys of its kind in the U.S., The Physicians Foundation's Survey of America's Physicians was sent to approximately 630,000 doctors, or 79% of all practicing physicians. A total of 17,236 responded between early April and mid-June 2016.

Physicians / Surgeons:

don't feel they have time to provide
the highest standard of care

72%

Medicare, the federal health insurance program for people who are 65 or older or who satisfy other qualifications, released its final MACRA rule on October 14, 2016. Known officially as the Medicare Access and CHIP Reauthorization Act of 2015, MACRA was drafted by the Centers for Medicare & Medicaid Services (CMS), and the original proposed rule signed into law on April 16, 2015. Weighing in at a hefty 2,400 pages, MACRA represents one of the biggest changes in Medicare's history and may take years for full implementation.

Physicians / Surgeons:

Q3 2016 Most In-Demand

by number of postings



Family Medicine

Emergency Medicine

Internal Medicine

14%
of postings

At its core, it establishes new ways for the program to pay physicians for caring for Medicare beneficiaries. Under MACRA, physicians who participate in the program will be paid based on the quality and effectiveness of the care they provide to Medicare patients. Physicians who treat these patients will earn more (or less) for their performance through two new payment systems (or tracks).

TRACK 1:
Merit-Based Incentive Payment System (MIPS). *Projected preference for 400,000 -500,000 clinicians.*

Reimbursement based on:

- Quality and effectiveness of care
- Meaningful use of EHR technology

TRACK 2:
Alternative Payment Models (APMs). *Projected preference for 100,000 clinicians.*

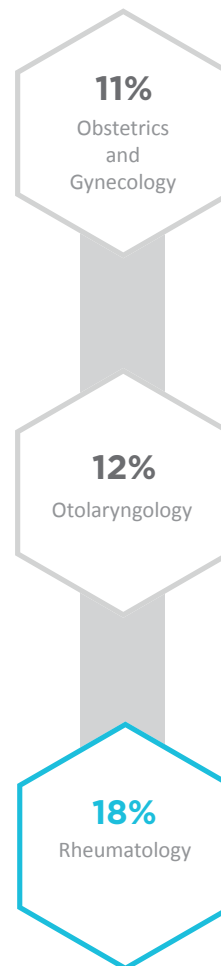
Reimbursement based on:

- Meeting set qualifications for EHR technology
- Report quality measures to the government
- Increased earnings by taking on some risk related to patients' outcomes

Practices should determine which track they intend to use by January 2017, as their choice will dictate the quality measurements that must be submitted to the government. Measurements submitted in 2017 will determine their Medicare reimbursement rates in 2019.

Physicians / Surgeons:

Most Growth from Q2 2016 to Q3 2016



Data released by the Physicians Advocacy Institute (PAI) reveals **38%** of U.S. physicians were employed by hospitals or health systems in 2015, an increase from 31% in 2014. The study, prepared by Avalere Health, found that hospitals acquired 31,000 physician practices between 2012 and 2015, an 86% increase over three years. While all the geographic regions examined in the report saw increases in hospital employment and practice ownership, the number of hospital-employed physicians was found to be greatest in the Midwest.

Top 10 Most In-Demand Non-Physician Positions in Q3 2016

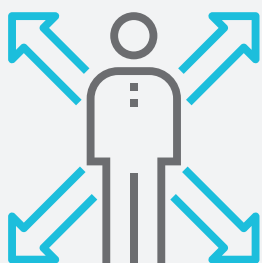
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|---------------------------------------|-----------------------------|---------------------------------|--|------------------------------|
| 1 General Medicine RN | 2 Family Medicine NP | 3 Emergency Medicine RN | 4 Nursing Assistant/Certified Nursing Assistant | 5 General LPN/LVN/RPN |
| 6 Psychiatric/Mental Health NP | 7 Family Medicine PA | 8 Occupational Therapist | 9 Emergency Medicine PA | 10 Case Manager RN |

Nurses, Nurse Practitioners and Physician Assistants

Together, nursing, nurse practitioner, and physician assistant positions accounted for 18% of all Health eCareers job openings in Q3 2016. Employers posted 9,554 jobs within these roles.

The demand for physician assistants is leading to increased compensation, according to a report from the American Academy of PAs (AAPA). The survey of 16,000 PAs found the number of professionals working within the

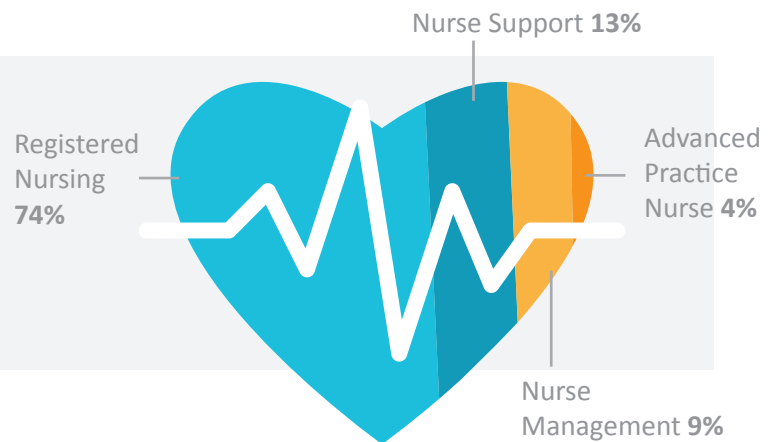
Nurses, NPs & PAs: Q3 2016 Job Postings



9,554
postings

18% of total Q3 2016
job postings on
Health eCareers

Nursing Opportunities: Breakdown of Job Postings



Top 10 Nursing Positions in Q3 2016

1. General Medical / Surgical RN
2. Emergency Medicine RN
3. Nursing Assistant / Certified Nursing Assistant
4. General LPN / LVN / RPN
5. Case Manager RN
6. ICU RN
7. General Medicine RN
8. Cardiology / Telemetry RN
9. Psychiatric / Mental Health RN
10. General Oncology RN

Nursing Opportunities:

Positions With The Most Growth Quarter-Over-Quarter



General Medical / Surgical RN



General Rehabilitation RN



Certified Registered Nurse Anesthetist (CRNA)

occupation grew 33% between 2010 and 2015, with a median annual salary reported at \$97,000 in 2015, a 3.4% increase over last year. Nearly 49% of full-time clinically practicing PAs earned bonuses in 2015, as well, with many receiving payments of \$5,000 or more. Employers awarded bonuses for milestone achievements, employee performance, practice performance, collections productivity, incentives, and more. Health eCareers salary data on PAs, collected for the 2016 Salary Guide, found PA compensation increased 4.3% over the last year.



Top 5 PA Positions in Q3 2016:

1. Family Medicine PA
2. Emergency Medicine PA
3. Orthopaedic PA
4. Urgent Care PA
5. Surgery PA

In September, the U.S. House of Representatives Energy and Commerce Committee unanimously passed the **Title VIII Nursing Workforce Reauthorization Act (H.R. 2713)**. This bipartisan legislation has the full support of the American Nurses Association (ANA) and would reauthorize important nursing workforce development programs through fiscal year 2020. Title VIII is the largest source of federal funding for nursing education from entry-level through graduate study. Between 2006 and 2012 alone, programs funded by Title VIII provided loans, scholarships and other support to over 450,000 nursing students and nurses. Both the House and Senate will need to approve the act before it can be signed into law. While proponents of the act believe this is possible during the lame duck session after November's election, it can only be helped by nurses reaching out to their members of Congress to share their stories and encourage support.

Top 5 NP Positions in Q3 2016:

1. Family Medicine NP
2. Psychiatric / Mental Health NP
3. Cardiology NP
4. Emergency NP
5. Urgent Care NP



Other Notable Growth Spots

Health eCareers saw notable growth in several specialties in Q3, the largest due to new customers. As more providers turn to Health eCareers, these numbers reflect the high-demand seen in many key areas.

Q3 Job Posting Growth

primarily driven by new customers



71%
Pharmacy



6%
Academics /
Research



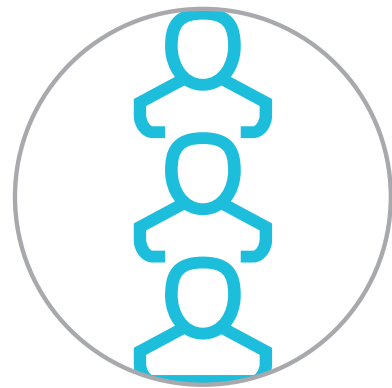
3%
Dietetics / Nutrition

Walgreens may soon be acquiring Rite Aid after announcing its intention to purchase the chain in 2015. The deal is expected to close by the end of this year and could require Walgreens' divestment of up to 1,000 stores in order to address antitrust concerns. These divestments could cause job losses for several thousand current Walgreens and Rite Aid pharmacists (and even more pharmacy technicians) unless potential buyers (including Kroger and CVS) choose to offer them new positions.

According to a survey conducted by the International Pharmaceutical Federation Collaborating Centre at University College London, more than 280,000 U.S. pharmacists are now trained to administer vaccines. This is a significant increase from 40,000 in 2007. All 50 states, the District of Columbia and Puerto Rico now allow pharmacists to administer vaccines, and all ACPE-accredited schools of pharmacy are now required to include immunization training in their curricula. As more pharmacy locations elect to add vaccination services, pharmacists who have not completed the APhA Pharmacy-Based-Immunization Delivery Certificate Training Program will find their job prospects improved by doing so.

Key Takeaways

- Physician / surgeon and nursing jobs continued to account for the largest percentages of opportunities advertised by employers on Health eCareers in Q3 2016. Jobs for nurse practitioners and physician assistants were also plentiful.
- General medicine physicians—specifically family medicine, emergency medicine, and internal medicine—continued to be in demand on Health eCareers. Specialties showing significant growth quarter-over-quarter included rheumatology, otolaryngology, and obstetrics and gynecology.
- Nursing positions continued to dominate the list of top 10 most in-demand non-physician positions as identified by Health eCareers employers, capturing seven of the 10 roles. The demand for specialties including medical / surgical director of nursing, general medical / surgery RN, infusion RN and general rehabilitation RN increased significantly.



About this Report

Data was collected from the Health eCareers online database of job openings, which are placed by healthcare providers across the U.S. Data for this snapshot was collected from July 1 to September 30, 2016 and is comprised of **54,265 healthcare and medical job openings** placed by **2,957 hospital and healthcare organizations**. These organizations range from large health systems to single-specialty practices, with an average hospital size of 300 beds. For more information or questions on breakdown by demographic please email Stephanie.Gilbert@healthcareers.com.

Healthcare is all about connection, and Health eCareers is the healthcare industry's career hub for professionals, employers and associations. With a network of more than 2.4 million job seekers, thousands of healthcare employers and more than 100 exclusive association partners, Health eCareers is designed to match qualified healthcare professionals—from physicians to non-clinical staff—with medical providers looking for top talent. But Health eCareers is more than just a place to look for your next job—it's a resource to help healthcare professionals advance their career at every stage. That's why Health eCareers also includes industry news and career advice targeted by healthcare specialty. For employers, Health eCareers offers innovative recruiting tools and services and healthcare hiring data that you won't find anywhere else. Health eCareers is a DHI Group, Inc. service.

Additional Resources

- www.bls.gov/ces/highlights072016.pdf
- www.bls.gov/ces/highlights082016.pdf
- www.bls.gov/ces/highlights092016.pdf
- http://www.nytimes.com/2016/10/08/business/economy/jobs-report-unemployment-wages.html?_r=0
- www.physiciansfoundation.org/uploads/default/Biennial_Physician_Survey_2016.pdf
- <http://mypatientlink.com/News/2017-requirements-macra>
- <http://www.fiercehealthcare.com/practices/1-4-physician-practices-now-hospital-owned>
- www.physiciansadvocacyinstitute.org/Portals/0/PAI-Physician-Employment-Study.pdf
- <http://revcycleintelligence.com/news/demand-for-physician-assistants-led-to-increased-pay-in-2015>
- [Health eCareers 2016 Salary Guide](#)
- http://www.huffingtonpost.com/rep-lois-capps/once-a-nurse-always-a-nur_b_12119862.html
- www.rnaction.org/site/DocServer/TITLE_VIII_NURSING_WORKFORCE_REAUTHORIZATION_ACT.pdf
- <https://www.nursingjobs.com/news-resources/title-viii-funding-for-nursing-moves-closer-to-a-vote/>
- <http://www.pharmacytimes.com/contributor/austin-hewlett-pharmd-mba-candidate/2016/10/walgreens-rite-aid-deal-could-close-soon-implications-for-pharmacists-and-patients>
- <http://drugtopics.modernmedicine.com/drug-topics/news/pharmacists-role-administering-vaccinations-increase>
- https://fip.org/files/fip/publications/FIP_report_on_Immunisation.pdf