



Health Care Workers in New Hampshire

A Snapshot of the Health Care Industry and Health Care Workers

Online Job Postings, June 1 through July 31, 2016

Health care is important to everyone. But the value of health care is not limited to personal health and well-being. The health care industry, defined as services provided by business establishments that are delivered by trained professionals, also makes significant contributions to the New Hampshire economy.

- Health care and social assistance accounted for roughly nine percent of the state's 2015 gross domestic product (GDP), providing services at a market value of around \$6 billion.¹
- In, 2015, about 73,630 workers were employed in private sector health care, the second largest number of workers among all private industry sectors, after retail trade.²
- About 2,845 health care establishments paid workers close to \$4.25 billion in wages, salaries, and bonuses in 2015, with an average weekly wage of \$1,110.³
- The location quotient compares an area's distribution of employment by industry to a reference or base area's distribution.⁴ The distribution of health care employment in New Hampshire was about the same as that of the nation, with a location quotient of 1.06.
- The location quotient for hospital employment in New Hampshire was 1.25, meaning for every 100 hospital workers nationally, in New Hampshire there were 125 hospital workers.
- As of March 2015, over 60 percent of health care and social assistance firms had fewer than 100 workers, but these firms employed less than eight percent of all health care and social assistance workers. At the same time, less than one percent of health care and social assistance firms employed 500 or more workers, but these firms employed over 36 percent of all health care and social assistance workers.⁵

Within the health care industry, there are three health care industry subsectors that provide direct medical care or a combination of medical care and social assistance: *Ambulatory health care services, Hospitals, and Nursing and residential care facilities.*⁶

¹ Department of Commerce, Bureau of Economic Analysis. www.bea.gov. Data excludes employment in government-owned establishments.

² Preliminary 2015 Annual Average New Hampshire Quarterly Census of Employment and Wages (QCEW), Bureau of Labor Statistics. www.bls.gov

³ Ibid.

⁴ Ibid.

⁵ Data for firms by size include the social assistance subsector with roughly 1,035 firms and first quarter employment of 14,400. Firms by Size, 2015 Q1. Economic and Labor Market Information Bureau, New Hampshire Employment Security. www.nhes.nh.gov/elmi/taistics/fbs.htm.

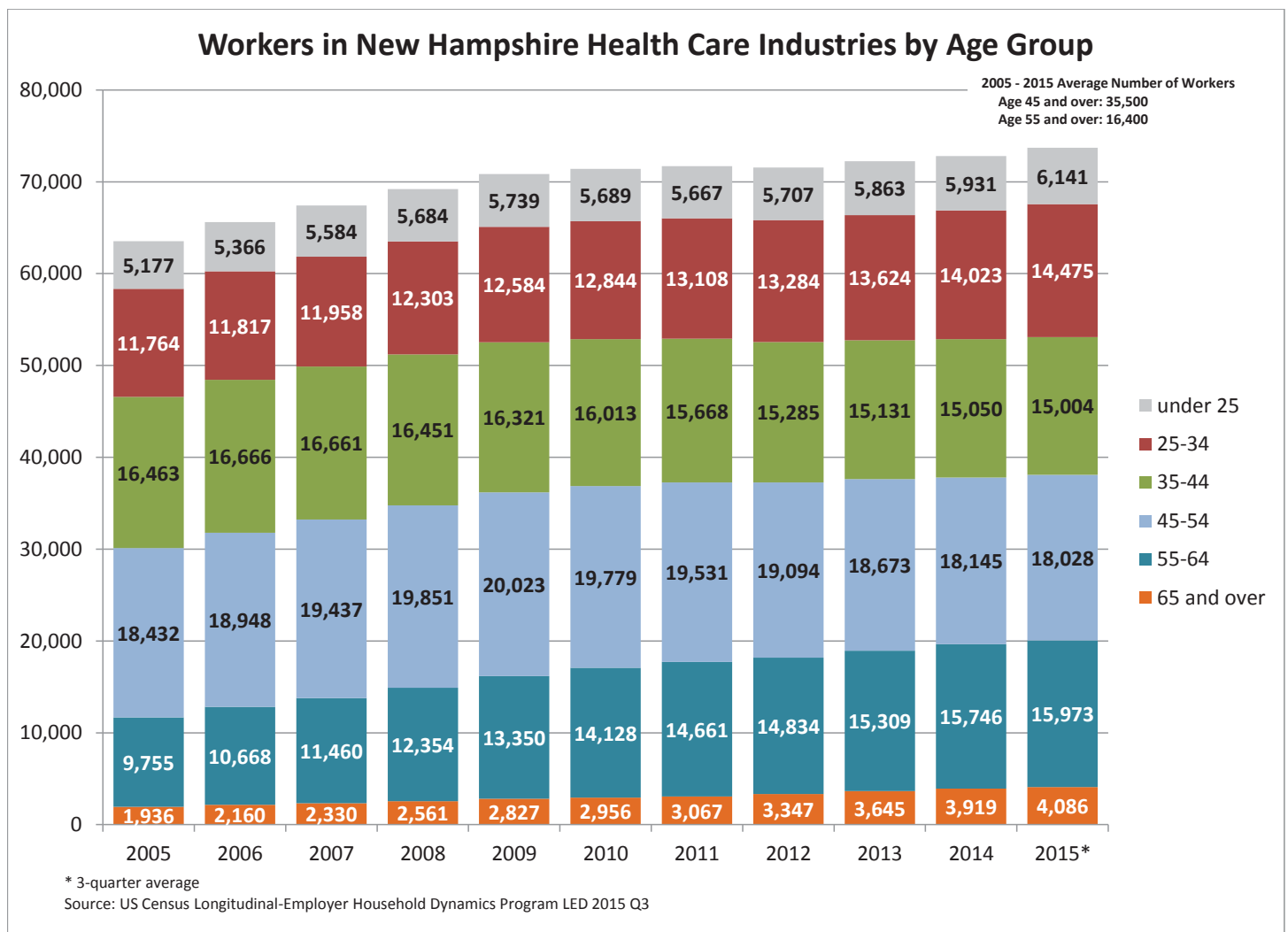
⁶ For purposes of this discussion, the social assistance subsector of the healthcare and social assistance industry is excluded.

The Face of Health Care Workers in New Hampshire

While males tend to dominate employment in the manufacturing industry, employment in the health care industry is decidedly dominated by females. Roughly 80 percent of health care workers are female; the share of females was similar among each of the three medical care subsectors. The proportion of females to males has shown only minimal change over the last ten years.

The health care industry has not been immune to the effects of New Hampshire’s aging workforce. As with many industries, older workers hold an increasing share of employment. Health care workers age 45 and older account for just over half of all health care workers.⁷ In 2005, 47.4 percent of workers in the health care industry were age 45 or older. By 2015, 51.7 percent of workers were age 45 or older. The number of health care workers in all age groups increased between 2005 and 2015, except for workers age 35 to 44. The share of workers age 35 to 44 declined from 25.9 percent to 20.4 percent over the ten-year period, which was more a reflection of the population (the baby-bust generation) than hiring practices.

Though the share of workers in the 55-64 years and the 65 years and over age groups has grown substantially, employment of workers in the 25-34 years and the under 25 years age groups has grown as well. Over the last ten years, the share of workers age 25-34 employed in health care increased from 18.5 percent to 19.6 percent, and the share of workers under age 25 increased from 8.1 percent to 8.3 percent.



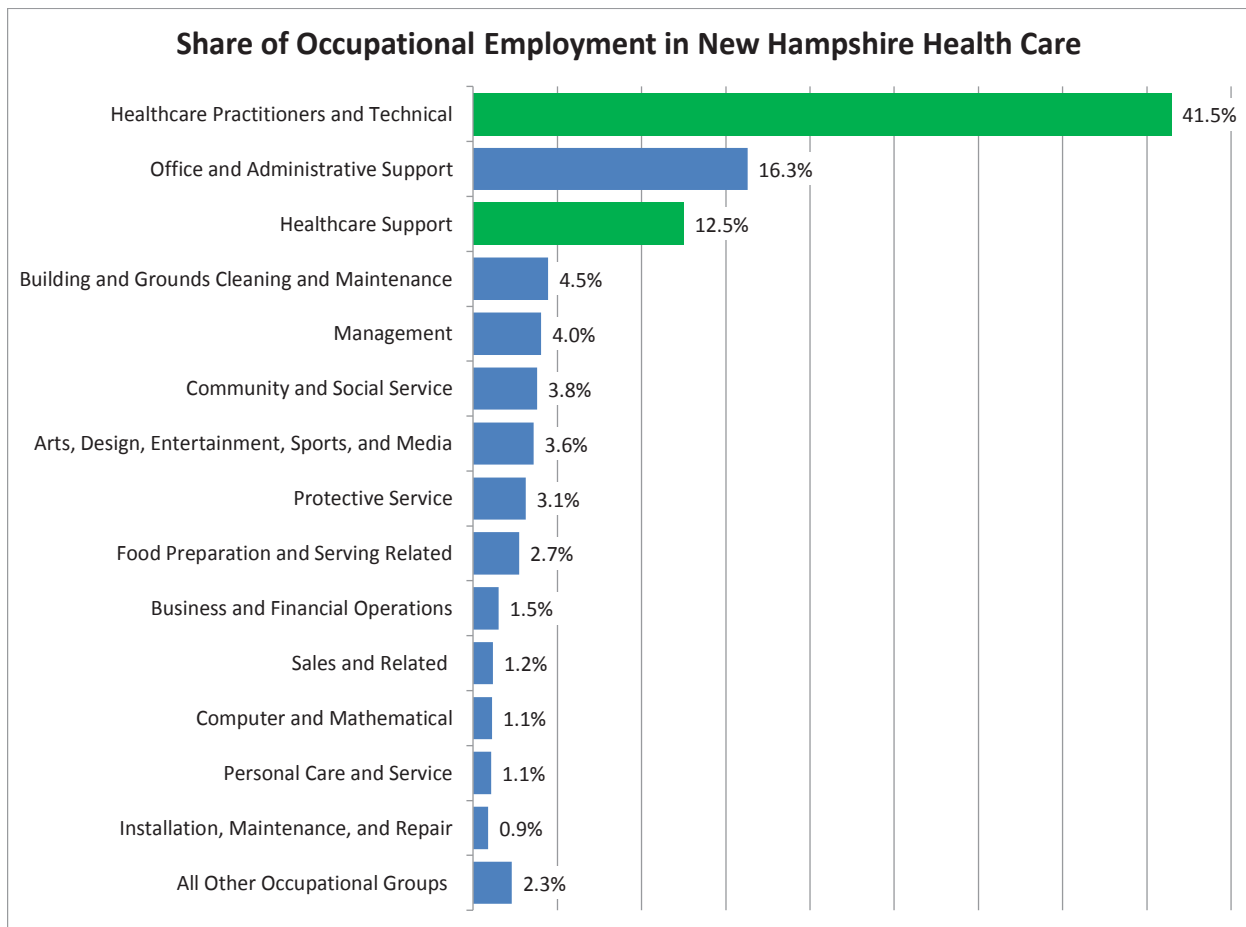
⁷ US Census Longitudinal-Employer Household Dynamics Program LED 2015 Q3. <http://ledextract.ces.census.gov/>

The Difference between Health Care Occupations and the Health Care Industry

As used to define the labor market, the term *health care* may refer to an industry or to occupations. The health care industry is comprised of business establishments that provide health care services. Health care occupations described the workers who perform tasks necessary to provide health care services. While workers in health care occupations account for 54 percent of employment in the three health care industry subsectors, these workers may be employed in other industries as well.

Workers in a health care occupation account for 58.2 percent of employment in *Ambulatory health care services*; while in *Hospitals*, 61.8 percent of employment is held by workers in a health care occupation. Less than half of employment at *Nursing and residential care facilities*, 46.7 percent, is held by workers in a health care occupation.⁸ On the other hand, about one of every four of the 55,525 workers in a health care occupation is employed in an industry other than health care.

Health care practices have evolved over time, giving rise to employment for workers who do not provide direct patient care. Changes to regulations and insurance such as HIPPA (the Health Insurance Portability and Accountability Act), ACA (the Affordable Care Act), Medicaid, and Medicare have created a demand for workers such as computer user support, health care data managers, medical coders, and medical insurance billing specialists. Just over 16 percent of employment at health care establishments is in an Office and administrative support occupation, a larger share than workers in Healthcare support occupations.⁹



⁸ 2015 Occupational Staffing Patterns, Occupational Employment Statistics Program, Economic and Labor Market Information Bureau, New Hampshire Employment Security

⁹ US Department of Labor, Bureau of Labor Statistics. Occupational Outlook Handbook. Medical Records and Health Information Technicians; What they do. <http://www.bls.gov/ooh/healthcare/medical-records-and-health-information-technicians.htm#tab-2>

Online Job Postings, June 1 to July 31, 2016

Online job postings for health care positions in New Hampshire are among the most numerous compared to all occupational groups. Health care practitioners and technical occupations accounted for 18.8 percent of online postings for New Hampshire from June 1 to July 31, 2016, and Health care support occupations comprised another 2.8 percent.

An assessment of online job ads based on the health care industry sector versus those based on health care occupations showed only small differences. Among online ads posted by health care industry employers, 57.7 percent were for Health care practitioners and technical occupations and 14.3 percent were for Health care support occupations. It was notable that postings from employers in the health care industry included ads for workers in:

- Management occupations, 6.6 percent of postings, and
- Office and administrative support occupations, 6.1 percent of postings.

The twelve occupations most frequently specified in online job ads from health care industry establishments were essentially the same as ads posted for health care occupations. The primary difference between the two was the volume of ads. Health care establishments posted 2,167 online job ads in New Hampshire, while there were 4,465 job ads for workers in health care occupations.

Occupations Most Frequently Included in Online Job Ads

Health Care Occupations, including Nursing - 4,465 postings		
O*Net Code	Occupation	Job Ads
29-1141.00	Registered Nurses	1,718
31-1014.00	Nursing Assistants	241
29-1123.00	Physical Therapists	231
29-2061.00	Licensed Practical and Licensed Vocational Nurses	166
29-1141.03	Critical Care Nurses	165
29-1127.00	Speech-Language Pathologists	161
11-9111.00	Medical and Health Services Managers	126
29-1171.00	Nurse Practitioners	122
29-1122.00	Occupational Therapists	114
29-2071.00	Medical Records and Health Information Technicians	113
29-1069.00	Physicians and Surgeons, All Other	92
43-6013.00	Medical Secretaries	63

Health Care Industry Sector - 2,167 postings		
O*Net Code	Occupation	Job Ads
29-1141.00	Registered Nurses	502
29-1123.00	Physical Therapists	227
31-1014.00	Nursing Assistants	151
29-2061.00	Licensed Practical and Licensed Vocational Nurses	97
11-9111.00	Medical and Health Services Managers	80
29-1122.00	Occupational Therapists	49
29-1127.00	Speech-Language Pathologists	41
31-9094.00	Medical Transcriptionists	41
29-1141.03	Critical Care Nurses	36
43-6013.00	Medical Secretaries	32
31-9092.00	Medical Assistants	27
29-1171.00	Nurse Practitioners	26

Shading indicates occupations not related to direct patient care

Source: Labor/Insight, Burning Glass Technologies, New Hampshire results June 1 to July 31, 2016

Employers Posting New Hampshire Health Care Job Ads

Three of every four online job postings placed by health care establishments identified the specific employer. Employers in the health care industry posted more online ads than employers seeking workers in health care occupations. The primary reason for the difference was that postings for the industry included occupations unrelated to direct patient care, such as maintenance, food prep, and bookkeepers.

New Hampshire Employers with the Most Online Health Care Job Ads

Postings By Occupational Group

Employer	Job Postings
Genesis Healthcare Corporation	299
MSN Travel Nursing	165
Dartmouth-Hitchcock Medical Center	103
Hospital Corporation of America	100
Readynurse	97
Genesis Rehab Services	73
Medtravelers	54
Fresenius	43
Onward Health	30
StaffDNA	30
Procare Therapy	29
St Joseph Hospital	29

Postings by Industry

Employer	Job Postings
Genesis Healthcare Corporation	340
Dartmouth-Hitchcock Medical Center	188
MSN Travel Nursing	165
Hospital Corporation of America	119
Genesis Rehab Services	73
Huggins Hospital	35
Southern New Hampshire Medical Ctr	34
St Joseph Hospital	34
Medtravelers	33
Onward Health	29
Benchmark Senior Living	28
Bayada Home Health Care	27

Bolded name indicates staffing agency or travel company

Source: Labor/Insight, Burning Glass Technologies,

New Hampshire results June 1 to July 31, 2016

The Future Outlook for Jobs in Health Care

According to New Hampshire employment projections for 2014 -2024¹⁰, employment in all industries, including government, the self-employed and unpaid family workers, is expected to increase by 7.0 percent, a gain of 47,300 jobs. Employment in the health care industry is expected to increase by 18.5 percent over the ten-year period, a gain of 13,500 jobs.

Occupational projections data estimate both job openings created due to industry growth, and also job opportunities created by the need to replace workers leaving the occupation, usually to retire. From 2014 to 2024, employment in Health care practitioners and technical occupations is expected to grow by 16.1 percent, an increase of 5,913 new jobs. This increase should yield about 594 new jobs from industry growth annually; another 809 openings are expected from the need to replace workers leaving these occupations each year.

New Hampshire Occupational Employment Projections, 2014-2024									
SOC Code	Occupation Title	2014	2024	Numeric Change	Percent Change	Average Annual Openings			
		Estimated	Projected			Growth	Replacement	Total	
Total, All Occupations		677,951	725,244	47,293	7.0%	5,194	16,176	21,370	
29-0000	Healthcare Practitioners and Technical Occupations	36,741	42,654	5,913	16.1%	594	809	1,403	
31-0000	Healthcare Support Occupations	18,784	22,208	3,424	18.2%	345	398	743	
Health Care Occupations with a Very Favorable Outlook									
29-1141	Registered Nurses	12,592	14,528	1,936	15.4%	194	297	491	
31-1014	Nursing Assistants	8,548	10,026	1,478	17.3%	148	193	341	
29-2061	Licensed Practical and Licensed Vocational Nurses	2,091	2,454	363	17.4%	36	60	96	
31-1011	Home Health Aides	1,669	2,254	585	35.1%	58	38	96	
29-1069	Physicians and Surgeons, All Other	1,964	2,299	335	17.1%	34	53	87	
31-9092	Medical Assistants	2,129	2,542	413	19.4%	41	44	85	
29-1123	Physical Therapists	1,453	1,905	452	31.1%	45	39	84	
31-9091	Dental Assistants	1,315	1,509	194	14.8%	19	32	51	
29-1171	Nurse Practitioners	770	1,045	275	35.7%	28	18	46	
31-9011	Massage Therapists	1,852	2,124	272	14.7%	27	14	41	
Largest Percent Change									
31-2021	Physical Therapist Assistants	515	699	184	35.7%	18	15	33	
29-1171	Nurse Practitioners	770	1,045	275	35.7%	28	18	46	
31-1011	Home Health Aides	1,669	2,254	585	35.1%	58	38	96	
31-2022	Physical Therapist Aides	135	178	43	31.9%	4	4	8	
31-2012	Occupational Therapy Aides	48	63	15	31.3%	2	1	3	
29-1123	Physical Therapists	1,453	1,905	452	31.1%	45	39	84	
29-1071	Physician Assistants	538	705	167	31.0%	17	12	29	
29-1181	Audiologists	79	103	24	30.4%	2	2	4	
31-2011	Occupational Therapy Assistants	175	225	50	28.6%	5	5	10	
29-1041	Optometrists	160	201	41	25.6%	4	6	10	
29-2091	Orthotists and Prosthetists	44	55	11	25.0%	1	0	1	
29-1161	Nurse Midwives	45	56	11	24.4%	1	1	2	
Most Total Openings									
29-1141	Registered Nurses	12,592	14,528	1,936	15.4%	194	297	491	
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¹⁰ Economic and Labor Market Information Bureau, New Hampshire Employment Security, Employment Projections by Industry and Occupation, base year 2014 to projected year 2024. www.nhes.nh.gov/elmi/products/proj.htm

Employment in Health care support occupations is expected to grow by 18.2 percent from 2014 to 2024, gaining 3,424 new jobs. Annually, 345 growth job openings plus 398 job openings to replace workers leaving these occupations are projected.

Most Health care practitioners and technical occupations and Health care support occupations are projected to have employment increases through 2024. Unsurprisingly, registered nurses and nursing assistants are expected to gain the most jobs, followed by home health aides, physical therapists, and medical assistants.

Along with employment change, projections data include a future employment favorability rating. Occupations with a very favorable outlook are expected to have the best prospects. Among the 78 health care occupations, 30 have a very favorable outlook, and another 34 have a favorable outlook. Occupations with a very favorable outlook have a very high percent change (12.1 percent or above) and a very high number of annual openings (50 or more).

Entry-Level Educational Attainment for Health Care Occupations

Projections data include the educational attainment that is usually required for entry-level employment in each occupation. From 2014 to 2024, half of health care occupations requiring at least a high school diploma or on-the-job training but less than a baccalaureate are expected to have very favorable employment prospects. Out of the 34 occupations with a very favorable or a favorable outlook and requiring less than a baccalaureate for entry-level employment, 15 require an occupational license, certificate, or registration ¹¹ to practice in New Hampshire.

Most health care occupations requiring at least a high school diploma also require post-hire on-the-job training, or OJT. OJT is categorized as short-term, less than one month; moderate-term, one to 12 months; or long-term, 12 months or longer. Home health aides are expected to have the highest growth rate and the largest number of average annual openings in this group, though no formal education and only short-term OJT is usually required for entry-level employment.

Entry-Level Education of High School and/or On-the-Job Training

Code	Occupation Title	2014	2024	Numeric Change	Percent Change	Average Annual Openings			Experience or OJT	Job Outlook
		Estimated	Projected			Growth	Replace	Total		
29-2081	Opticians, Dispensing*	501	617	116	23.2%	12	13	25	12+ mo. OJT	Very Favorable
29-2052	Pharmacy Technicians*	1,362	1,521	159	11.7%	16	14	30	1-12 mo. OJT	Very Favorable
31-9093	Medical Equipment Preparers	226	241	15	6.6%	2	5	7	1-12 mo. OJT	Favorable
29-9012	Occupational Health and Safety Technicians	43	47	4	9.3%	0	1	1	1-12 mo. OJT	Favorable
31-2022	Physical Therapist Aides	135	178	43	31.9%	4	4	8	< 1 mo. OJT	Favorable
31-9096	Veterinary Assistants and Laboratory Animal Caretakers	188	206	18	9.6%	2	4	6	< 1 mo. OJT	Favorable
31-2012	Occupational Therapy Aides	48	63	15	31.3%	2	1	3	< 1 mo. OJT	Favorable
31-9099	Healthcare Support Workers, All Other	468	527	59	12.6%	6	10	16	none	Very Favorable
29-2099	Health Technologists and Technicians, All Other	497	592	95	19.1%	10	5	15	none	Very Favorable
31-1011	Home Health Aides	1,669	2,254	585	35.1%	58	38	96	< 1 mo. OJT	Very Favorable

*Occupations that must be licensed, certified, or registered to practice in New Hampshire

¹¹Licensed, Certified, and Registered Occupations in New Hampshire, Economic and Labor Market Information Bureau, New Hampshire Employment Security. January 2016. NOTE: Licensure requirements for medical technicians, magnetic resonance (MRI) technologists, nuclear medicine technologists, radiation therapists, radiographers, radiologist assistants, and sonographers were recently signed into law. Rules had not yet been promulgated as of September 26, 2016.

Another group of health care occupations usually require some type of postsecondary education, such as a non-degree certificate, for entry-level employment. Nursing assistants are projected to have the most annual openings, while emergency medical technicians and paramedics are expected to grow the fastest. One occupation in this group, psychiatric technicians, usually requires up to five years of work experience in a related occupation for entry-level employment.

Entry-Level Education of Non-Degree Postsecondary Study

Code	Occupation Title	2014	2024	Numeric Change	Percent Change	Average Annual Openings		Experience		Job Outlook
		Estimated	Projected			Growth	Replace	Total	or OJT	
29-2053	Psychiatric Technicians	41	47	6	14.6%	1	0	1	< 5 yrs. Exp	Favorable
31-1014	Nursing Assistants*	8,548	10,026	1,478	17.3%	148	193	341	none	Very Favorable
29-2061	Licensed Practical and Licensed Vocational Nurses*	2,091	2,454	363	17.4%	36	60	96	none	Very Favorable
31-9092	Medical Assistants	2,129	2,542	413	19.4%	41	44	85	none	Very Favorable
31-9091	Dental Assistants	1,315	1,509	194	14.8%	19	32	51	none	Very Favorable
31-9011	Massage Therapists*	1,852	2,124	272	14.7%	27	14	41	none	Very Favorable
29-2041	Emergency Medical Technicians and Paramedics*	980	1,205	225	23.0%	22	16	38	none	Very Favorable
29-2071	Medical Records and Health Information Technicians	888	1,012	124	14.0%	12	20	32	none	Very Favorable
31-9097	Phlebotomists	669	790	121	18.1%	12	14	26	none	Very Favorable
29-9099	Healthcare Practitioners and Technical Workers, All Other	613	692	79	12.9%	8	12	20	none	Very Favorable
29-2055	Surgical Technologists	360	406	46	12.8%	5	4	9	none	Favorable
29-2057	Ophthalmic Medical Technicians	218	263	45	20.6%	4	2	6	none	Favorable

*Occupations that must be licensed, certified, or registered to practice in New Hampshire

Health care occupations requiring at least an Associate’s degree for entry-level employment are more likely to need a license, certification, or registration to practice in New Hampshire than those needing less education. Registered nurses continue to lead in average annual openings, and ranks sixth among all occupations. Physical therapist assistant is projected to have the second-largest number of average annual openings, and the highest percent change among all health care occupations requiring less than a baccalaureate.

Entry-Level Education of an Associate's Degree

Code	Occupation Title	2014	2024	Numeric Change	Percent Change	Average Annual Openings		Experience		Job Outlook
		Estimated	Projected			Growth	Replace	Total	or OJT	
29-1141	Registered Nurses*	12,592	14,528	1,936	15.4%	194	297	491	none	Very Favorable
29-2021	Dental Hygienists*	1,176	1,347	171	14.5%	17	19	36	none	Very Favorable
31-2021	Physical Therapist Assistants*	515	699	184	35.7%	18	15	33	none	Very Favorable
29-2056	Veterinary Technologists and Technicians	721	872	151	20.9%	15	7	22	none	Very Favorable
29-2034	Radiologic Technologists*	773	803	30	3.9%	3	15	18	none	Favorable
29-2012	Medical and Clinical Laboratory Technicians*	480	524	44	9.2%	4	12	16	none	Very Favorable
29-1126	Respiratory Therapists*	372	412	40	10.8%	4	9	13	none	Very Favorable
31-2011	Occupational Therapy Assistants*	175	225	50	28.6%	5	5	10	none	Favorable
29-2032	Diagnostic Medical Sonographers*	200	237	37	18.5%	4	4	8	none	Favorable
29-2031	Cardiovascular Technologists and Technicians	185	218	33	17.8%	3	4	7	none	Favorable
29-1124	Radiation Therapists*	116	125	9	7.8%	1	3	4	none	Favorable
29-2051	Dietetic Technicians	122	138	16	13.1%	2	1	3	none	Favorable

*Occupations that must be licensed, certified, or registered to practice in New Hampshire

For more information on this and other ELMI publications, contact:

Anita Josten, Research Analyst
(603) 228-4173

Katrina Evans, Assistant Director
(603) 229-4370



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