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How will long-term care workforce demand be impacted by changes in demographics and utilization patterns?

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The looming long-term care crisis

- By 2030: More than 70 million people 65 years and older
 - 20% of the population
- By 2050: Number needing long-term care will more than double
 - 8 million in 2000 to 19 million in 2050
- Who will care for those with long-term care (LTC) needs?
 - IOM projects 3.5 million additional workers by 2030
- This study examines how changing demographics and service use might affect future LTC worker demand

Long-term care settings and workforce

- Settings for LTC
 - 25% institutions
 - Nursing homes
 - Assisted living
 - 75% home and community based services (HCBS)
- Workers
 - Within institutions: mostly RNs, LPNs, CNAs
 - HCBS: mostly unlicensed direct-care workers

Changing patterns of LTC use?

- General trend toward more HCBS use
- Demographics
 - Growing Hispanic & Asian populations
 - Traditionally use fewer LTC services
 - Growing Black population
 - Traditionally uses more LTC services
- New programs supporting HCBS
 - ACA made \$4.3 billion available through multiple programs

Methods

1. Measure use of 4 types of LTC services by age/ethnic/gender
2. Extrapolate future use based on population projections
3. Measure employment by occupation in each LTC service sector
4. Extrapolate future worker demand by occupation using data from steps 2 & 3

(Yes, this is a giant spreadsheet exercise!)

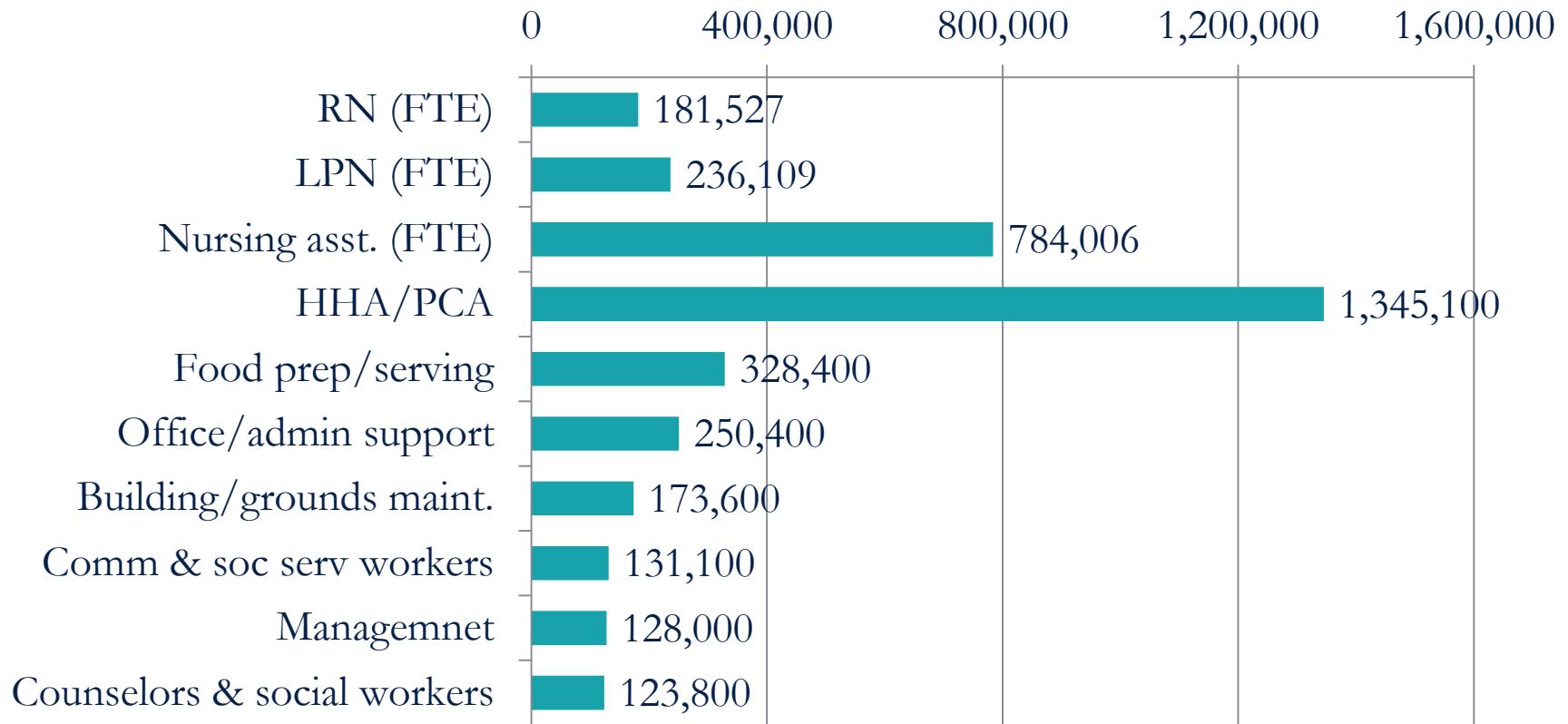
Data sources: A hunting expedition

- National Health and Aging Trends Survey (NHATS) 2011
 - Nursing home
 - Residential care (assisted living and continuing care communities)
- Medical Expenditures Panel Survey (MEPS) 2009-2011
 - Home health services (ratio of users/population)
- National Study of Long-Term Care Providers (NSLTCP) 2013
 - Adult day care center clients/population
- Census Bureau: Population estimates 2010 & projections

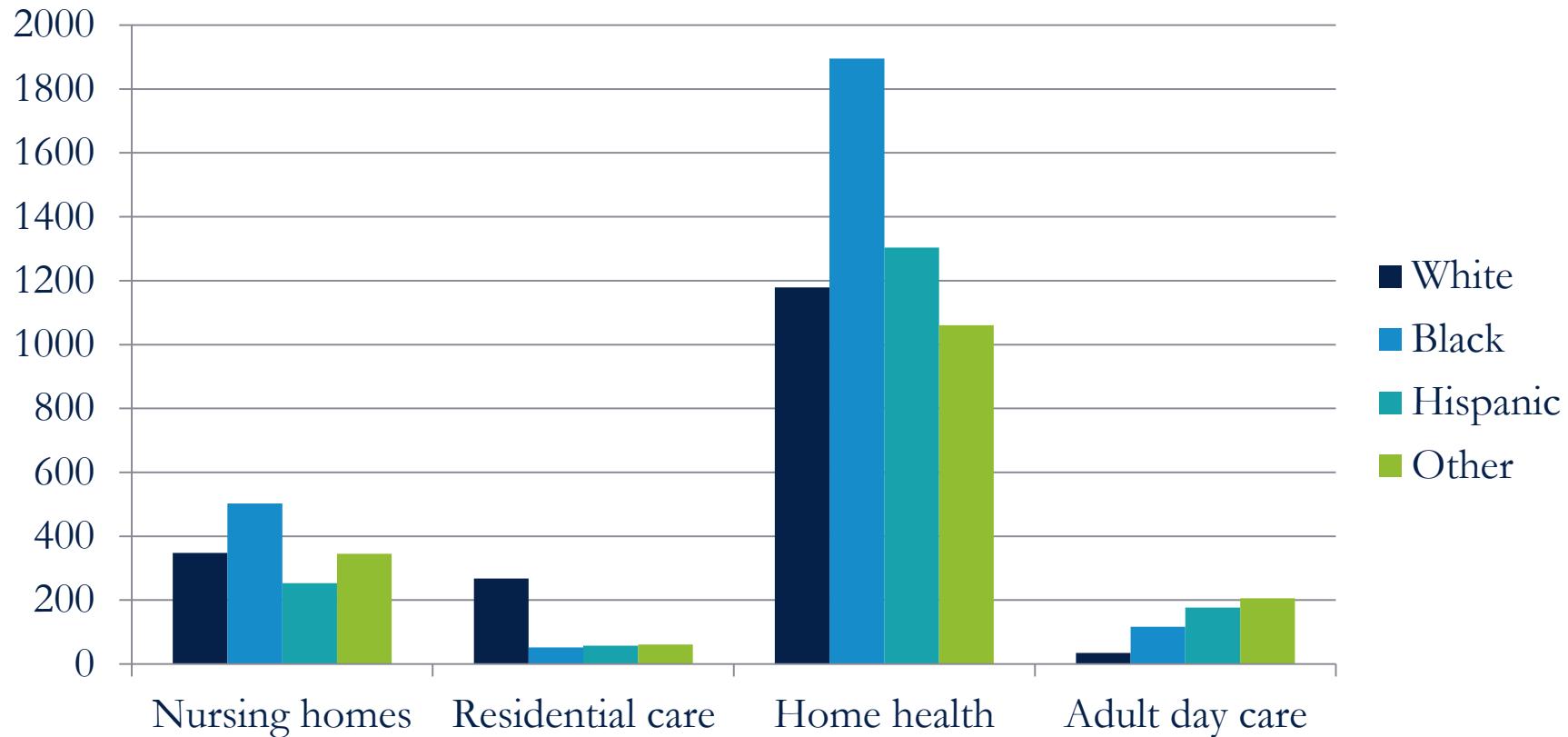
Employment data

- National Study of Long-Term Care Providers
 - Nursing FTEs for RNs, LPNs, and nursing assistants
 - Data reported for each type of setting
- BLS National Employment Matrix
 - Matched to settings using NAICS codes
 - Combined home health aides & personal care aides

Jobs/FTEs in long-term care

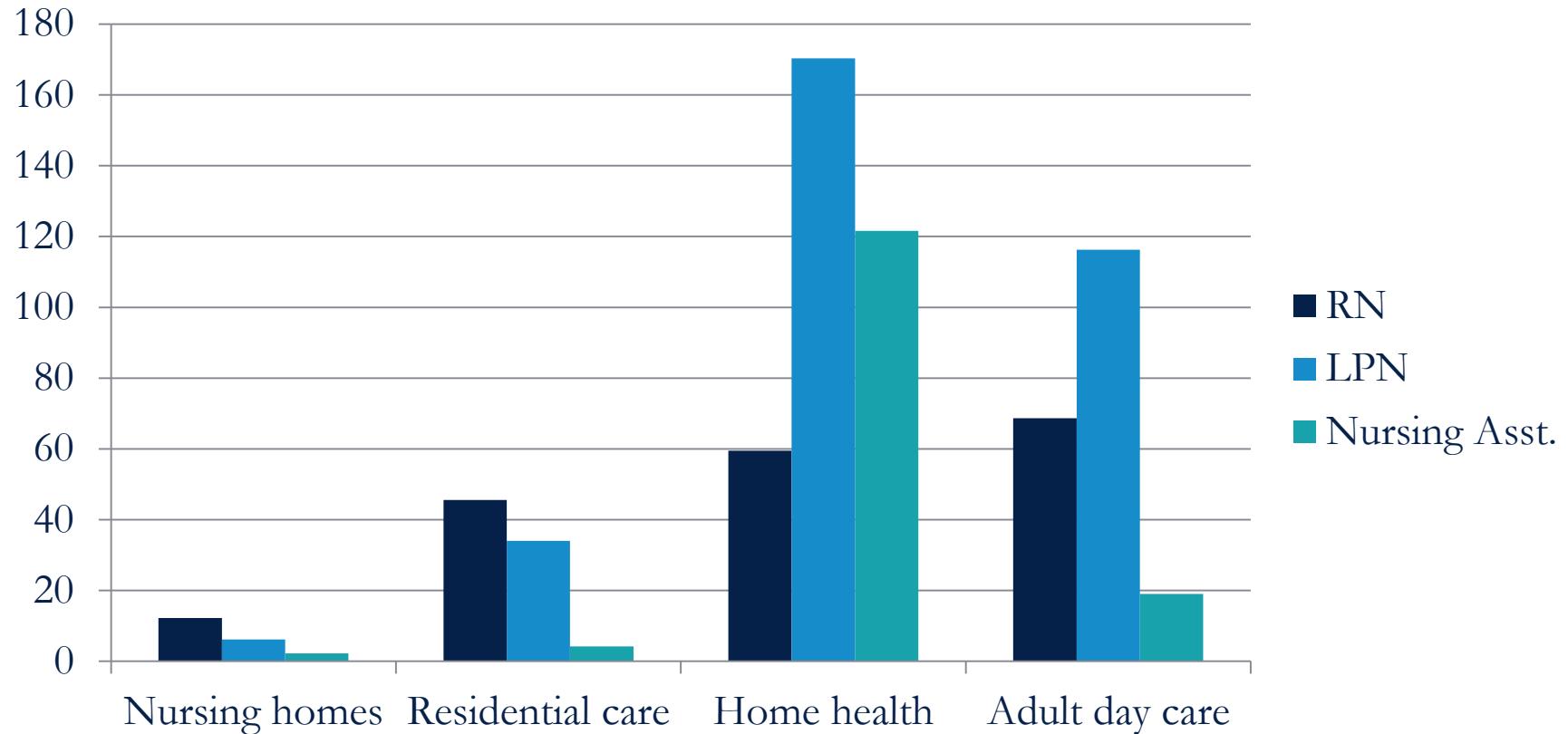


Use of services by women 75-84 years



Women use nursing homes, residential care, and home health at higher rates than men.

Users of LTC service per FTE worker



Other patterns of employment

- Home health & personal care aides
 - More in residential care, home health, adult day care
- Food prep & serving, Building & grounds maintenance
 - More in nursing homes & residential care
- Office & administrative support, Community & social services workers, Counselors & social workers, Management
 - More in adult day services

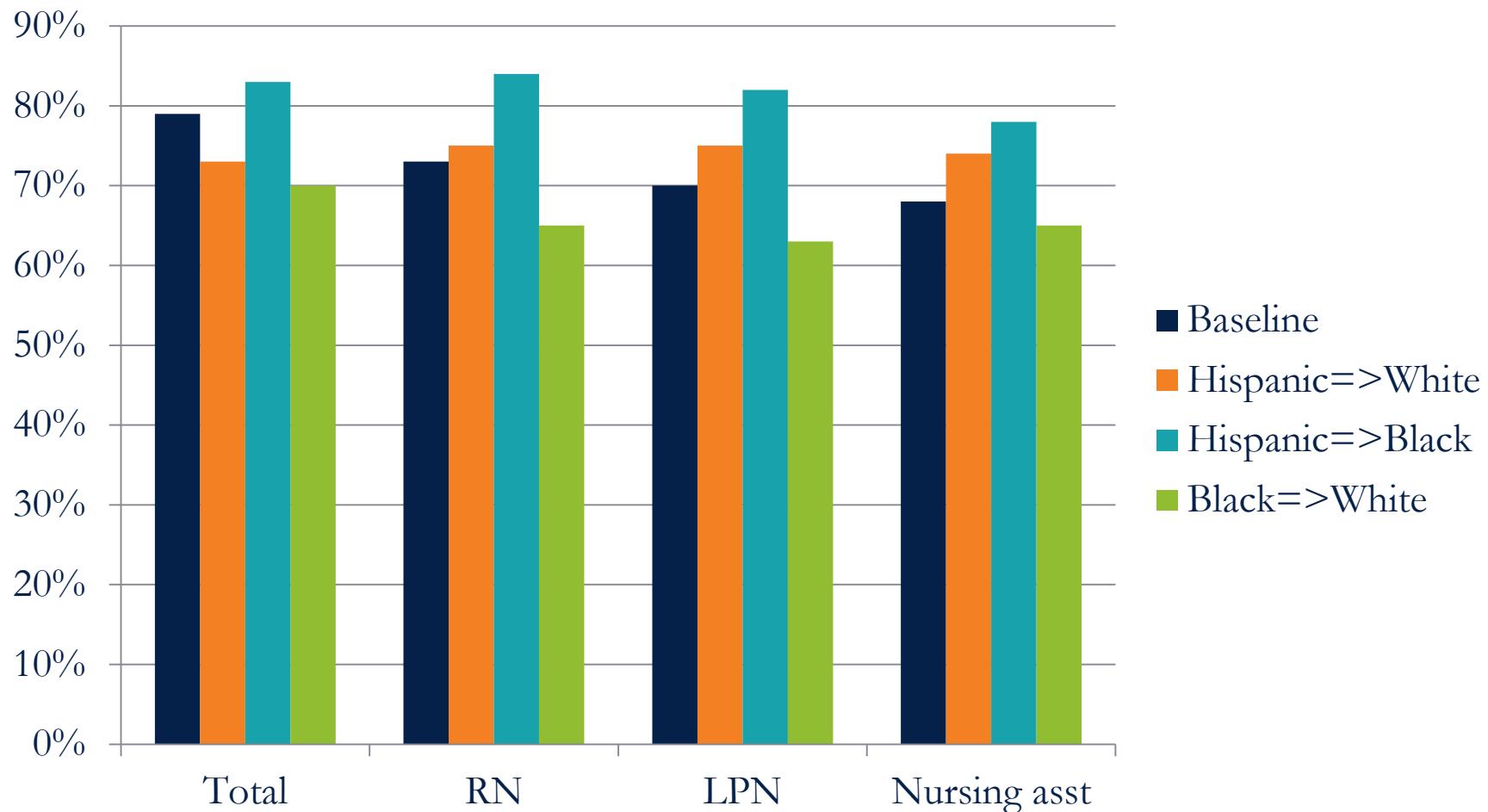
Projected job/FTE growth: 2010-2030

Occupation	New jobs	Growth
RN (FTE)	132,869	73%
LPN (FTE)	166,242	70%
Nursing assistants (FTE)	534,548	68%
HHA/PCA	1,188,897	88%
Food prep & serving	219,457	67%
Office & admin support	196,416	78%
Building & grounds maint.	119,715	69%
Comm & soci serv	121,700	93%
Management	99,827	78%
Counselors & soci work	116,171	94%
Total (jobs+FTE)	2,895,842	79%

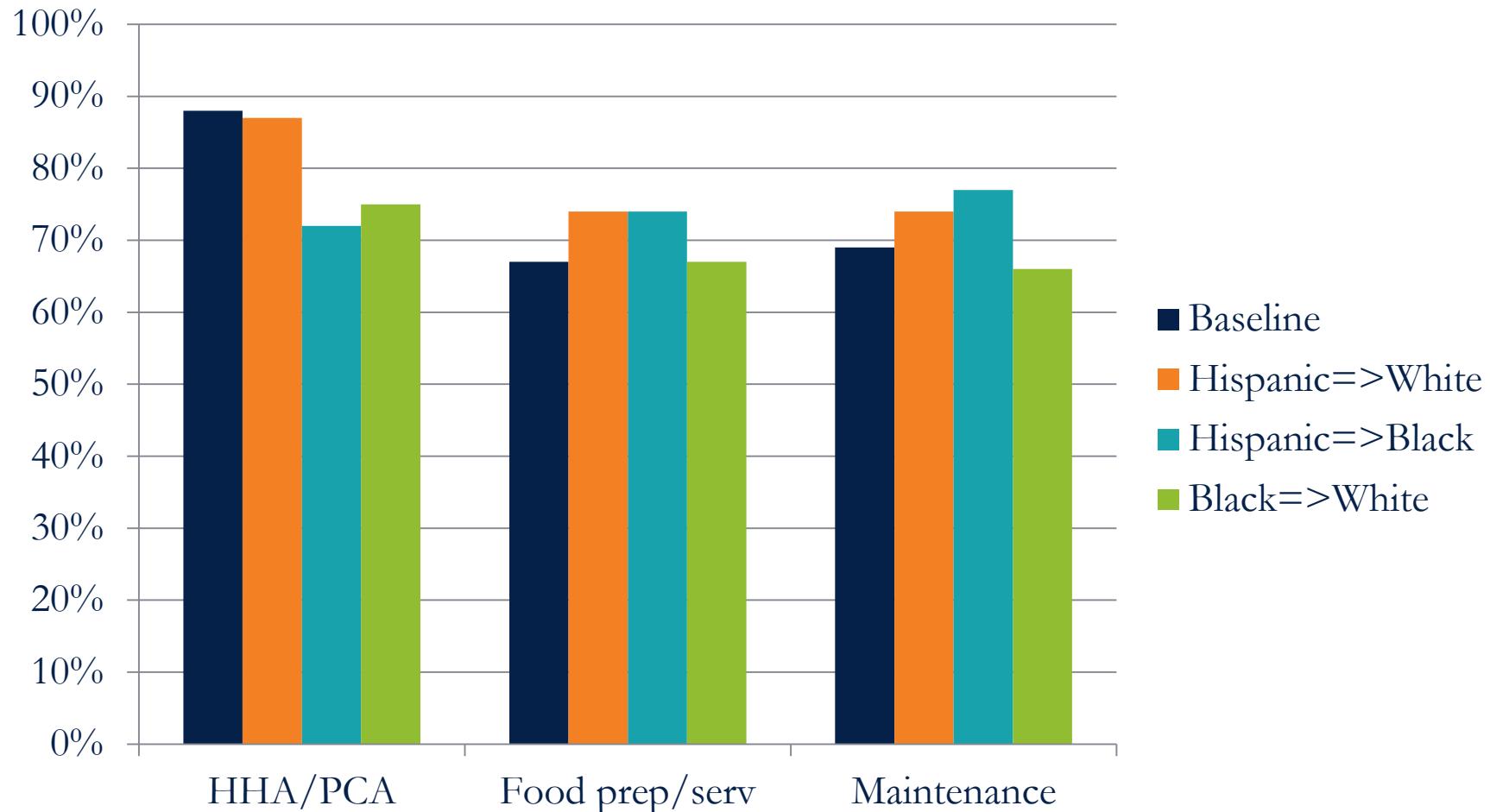
Alternate scenarios

1. Demographic scenarios
 - A. Hispanics at same rates as Whites
 - B. Hispanics at same rates as Blacks
 - C. Blacks at same rates as Whites
2. LTC settings
 - A. Nursing home use is 10% lower, shifts to home health
 - B. Nursing home use is 20% lower, shifts to home health
 - C. Nursing home is 10% lower, shifts to residential care

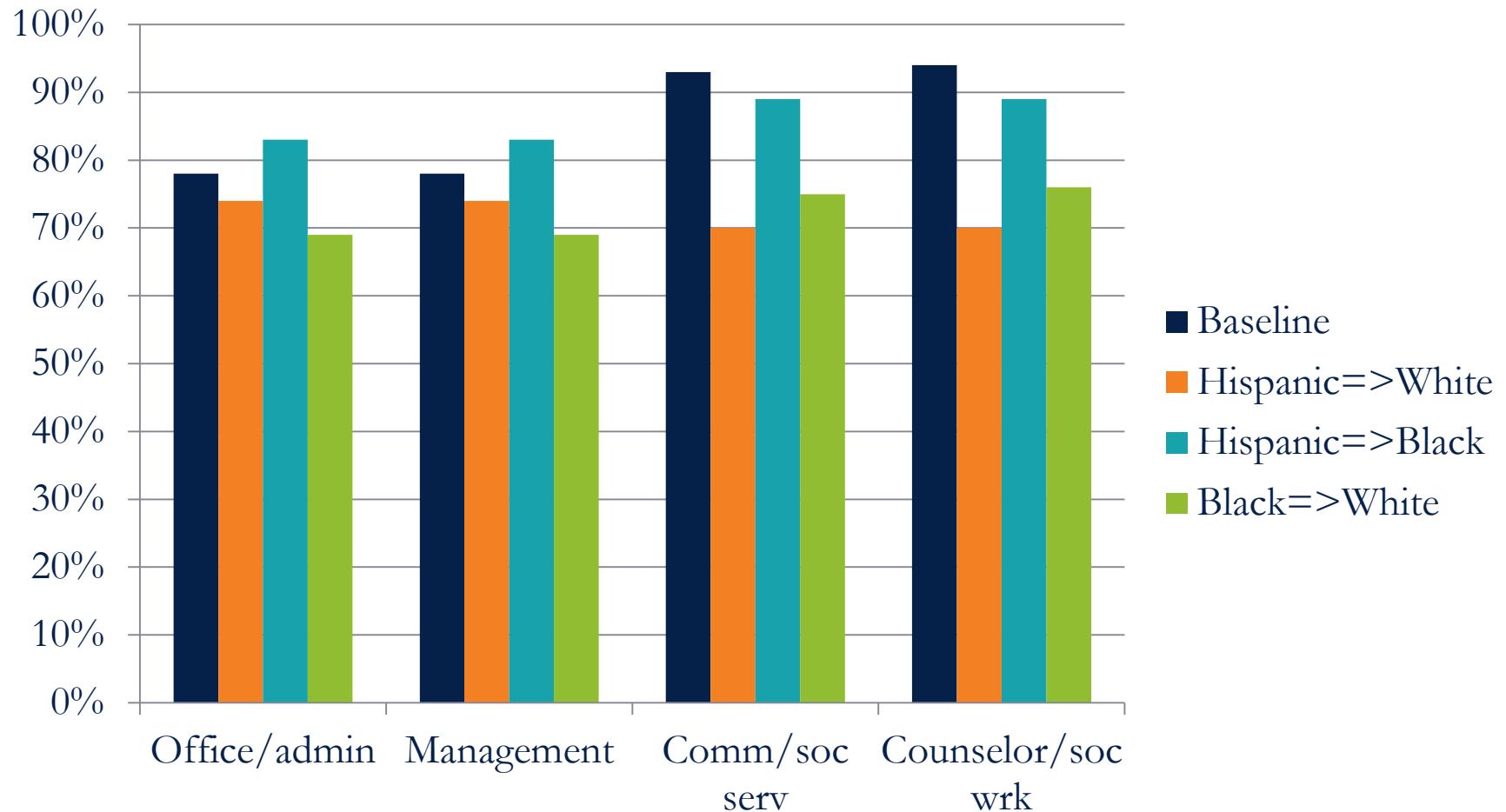
Demographic scenarios



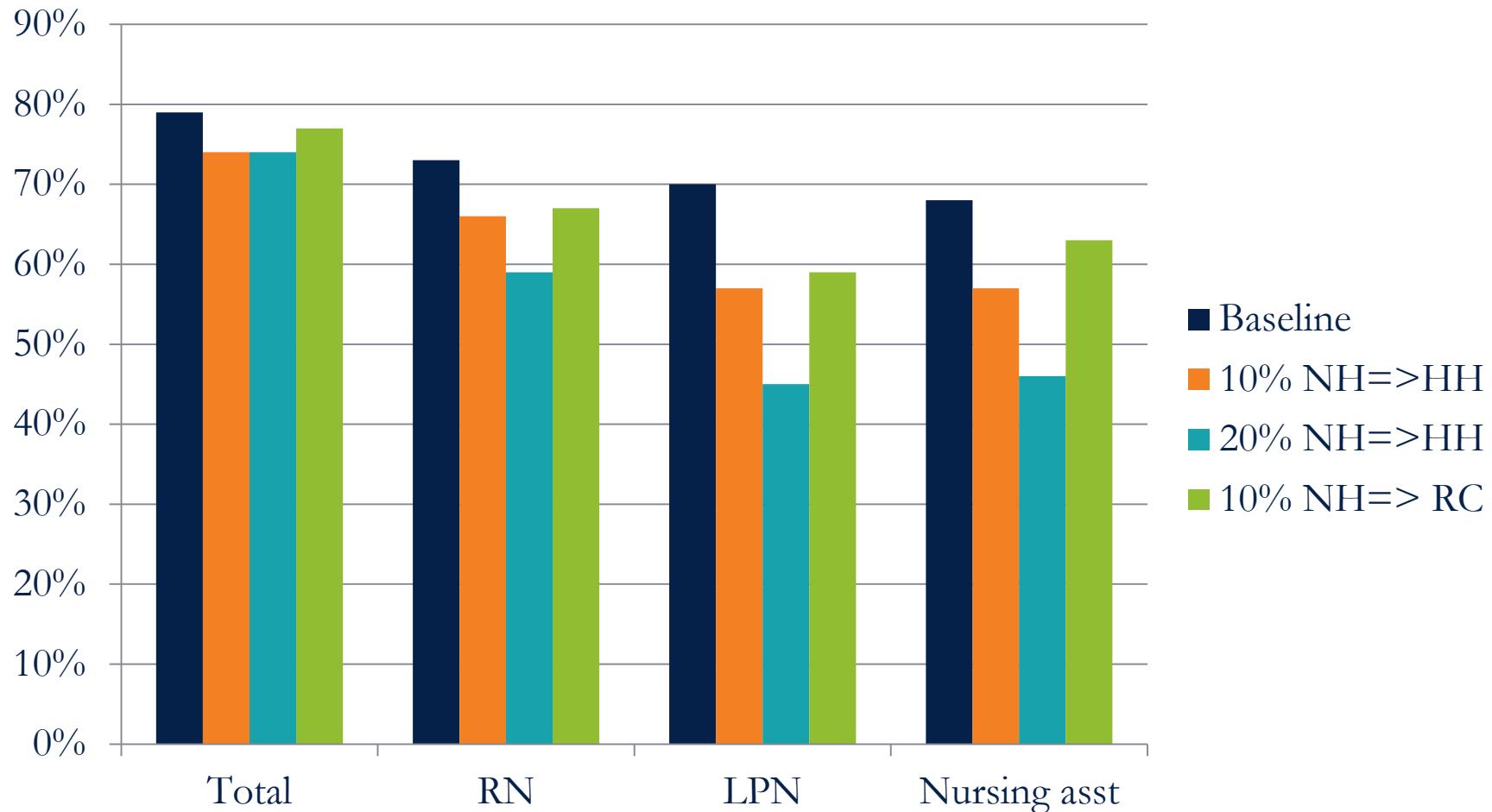
Demographic scenarios



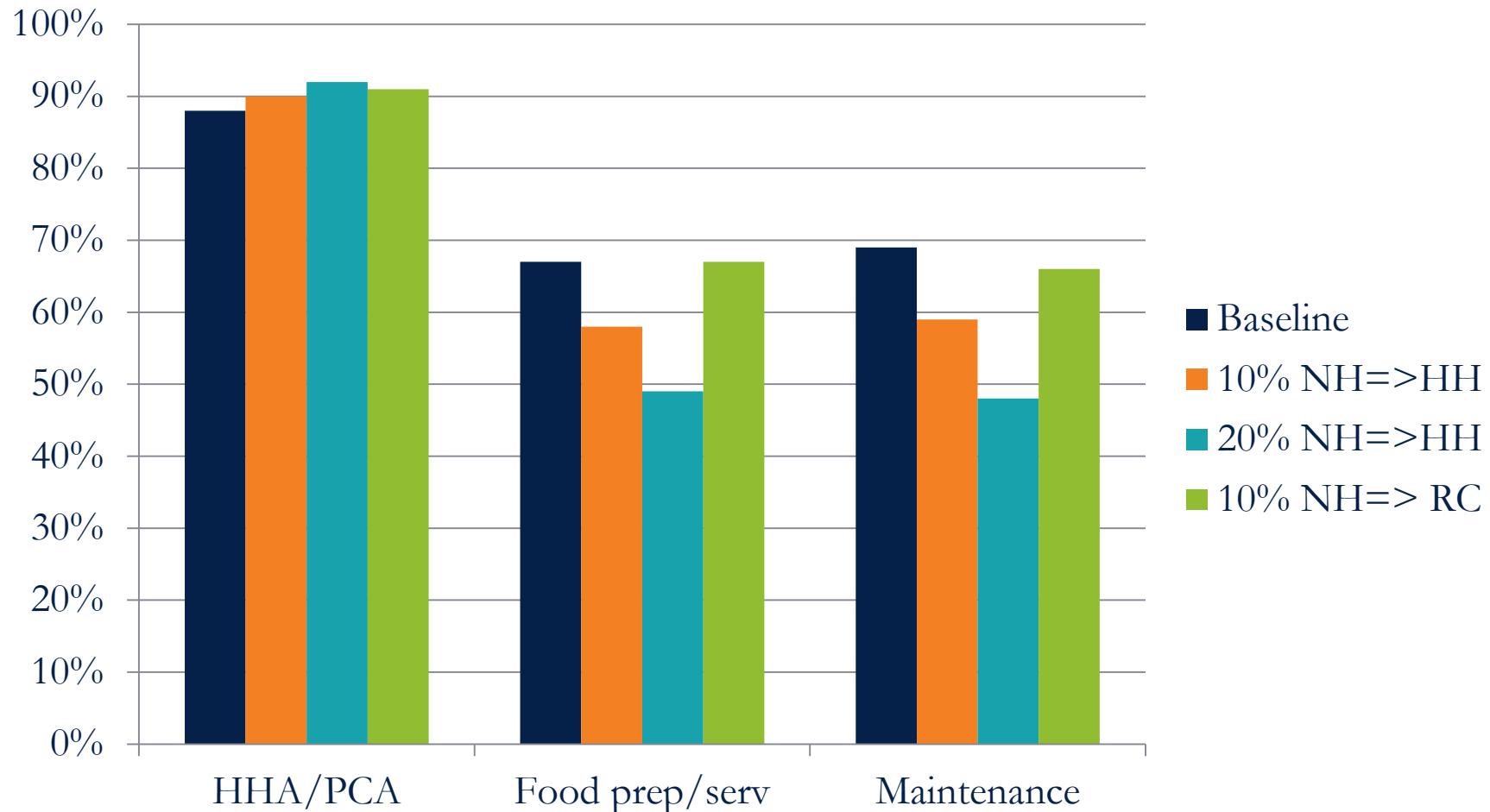
Demographic scenarios



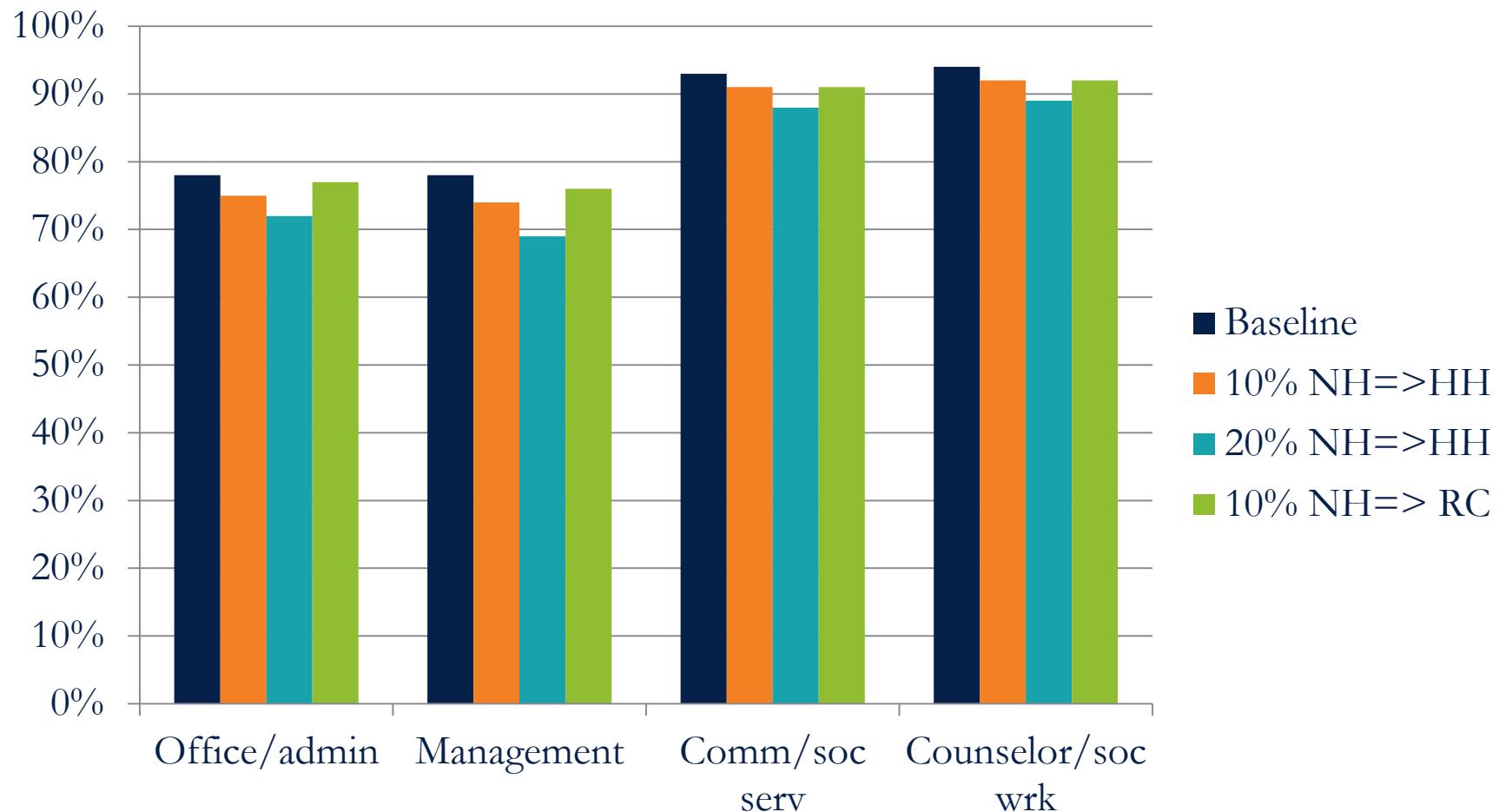
Utilization scenarios



Utilization scenarios



Utilization scenarios



Limitations

- Not a microsimulation model
 - Not a dynamic model
- Only considered older population
 - Young adults and children are 1/3 of LTC population
- Some services are not measured
 - Unlicensed home health agencies
- Could not disaggregate Asians & “other” ethnic groups
- Had to estimate some age-gender-ethnicity cells

Policy implications

- Demographic change could affect job growth for specific occupations, but overall job growth for LTC doesn't change much
- Greater use of home health (and less of nursing homes) will have small effects unless the shift in setting is large
- Expansions of HCBS will be needed – ACA investments are not enough
- Need to consider:
 - Training requirements for PCAs and HHAs
 - Strategies to reduce turnover
 - Making sure these are not poverty-level jobs