Updated Nurse Supply and Demand Projections 2018-2032

Executive Summary

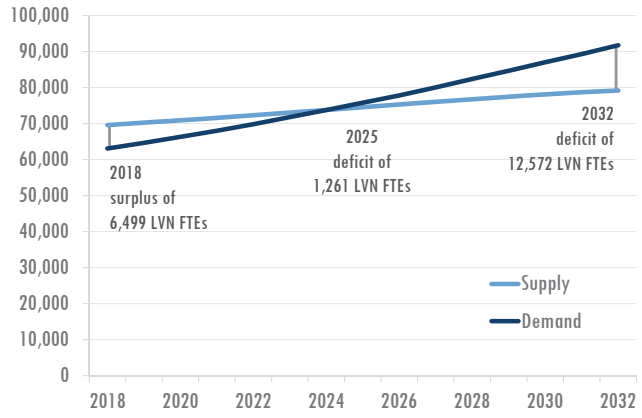
Since the release of the Health Resources and Services Administration (HRSA) report, "The Future of the Nursing Workforce: National- and State-Level Projections, 2012-2025," the Texas Center for Nursing Workforce Studies contracted with IHS Inc. to use the same models used by HRSA to estimate nurse supply and demand, but with Texas specific data as available. These projections will be able to more accurately model the nursing workforce in our state. The following figures project the statewide supply and demand for nurse FTEs through 2032, with a baseline year of 2018.

As you can see in the figures below, Texas will face a shortage of most nurse types by 2032. The supply of licensed vocational nurses (LVNs), registered nurses (RNs), and certified nurse-midwives (CNMs) will fall short of demand by 2032. Based on current trends, the projected supply of nurse practitioners (NPs) and certified registered nurse anesthetists (CRNAs) is expected to exceed demand every year between 2018 and 2032. Projections by NP type are available at http://healthdata.dshs.texas.gov/dashboard/healthcare-workforce/workforce-supply-and-demand-projections.

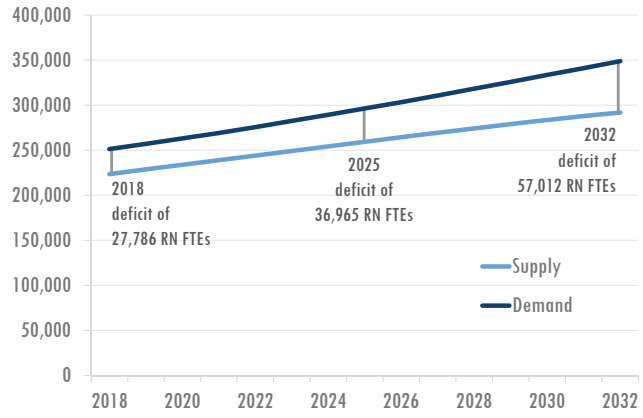
Key Findings

- The 2018 supply of LVNs is projected to be 69,577 LVN FTEs, with demand for 63,078, leading to a surplus of 6,499 LVN FTEs. By 2032, the supply of LVN FTEs is expected to grow by 13.8% to 79,179, while demand will grow by 45.5% to 91,750 leading to a shortage of 12,572 LVN FTEs. Between 2018 and 2024, the state will have more than enough LVN FTEs to meet demand. By 2025, the surplus of LVN FTEs will become a deficit that will more than double by 2032.
- The supply of RNs in Texas is projected to 223,581 RN FTEs in 2018, with demand for 251,367, leaving a deficit of 27,786 RN FTEs. By 2032, the supply of RN FTEs is expected to grow by 30.5% to 291,872, while demand will grow by 38.8% to 348,883, leaving a deficit of 57,012 RN FTEs. Based on these projections, 16.3% of the projected demand for RNs in 2032 will not be met.
- The projected supply of NPs in Texas is expected to grow by 117.3% from 20,922 NP FTEs in 2018 to 45,462 in 2032. During this same time period, demand for NPs is projected to grow by 35.6% from 19,317 in 2018 to 26,191 by 2032. The surplus of NPs is projected to grow from 1,605 in 2018 to 19,271 in 2032.
- The supply of CRNAs in Texas is projected to grow from 4,074 CRNA FTEs in 2018 to 5,938 in 2032, or by 45.8%. The demand for CRNAs in Texas will grow by 30.9% during this period from 2,075 CRNA FTEs to 2,717. The surplus of CRNAs is projected to grow from 1,999 in 2018 to 3,221 in 2032.
- The projected supply of CNMs is expected to increase by 43.6% from 432 CNM FTEs in 2018 to 621 in 2032. Meanwhile, the demand for CNMs is projected to increase by 23.0% from 798 CNM FTEs in 2018 to 981 in 2032. By 2030, 36.8% of demand for CNMs will not be met.
- FTE demand is expected to increase in all settings for RNs and LVNs between 2018 and 2032. The largest demand for both LVNs and RNs is in the inpatient hospital setting.

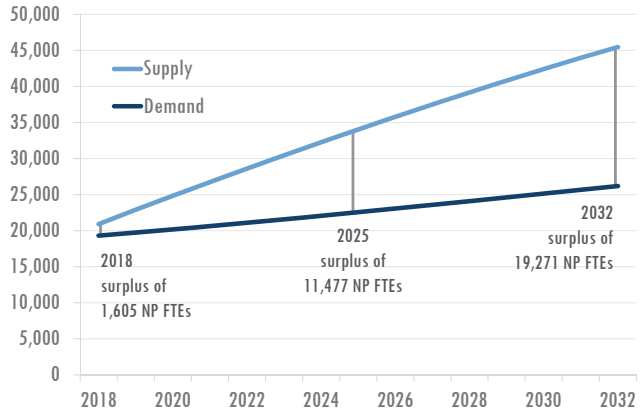
LVN FTE Supply and Demand, 2018-2032



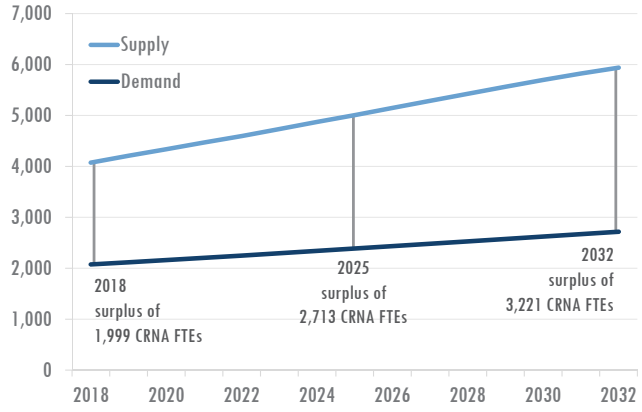
RN FTE Supply and Demand, 2018-2032



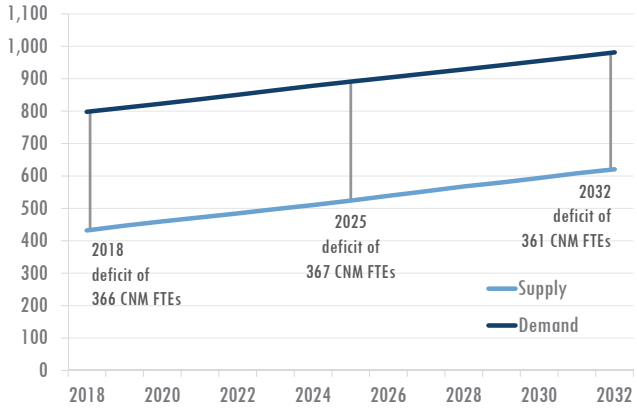
NP FTE Supply and Demand, 2018-2032



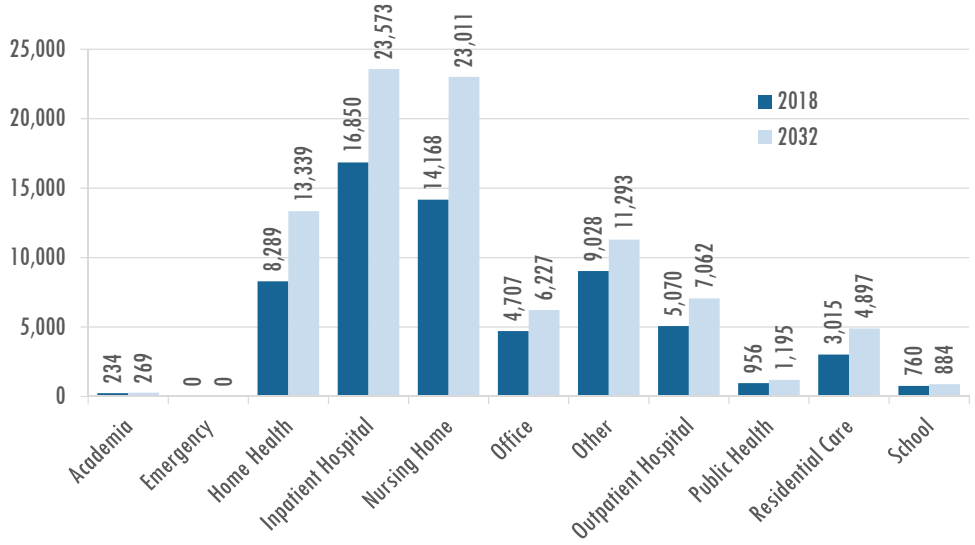
CRNA FTE Supply and Demand, 2018-2032

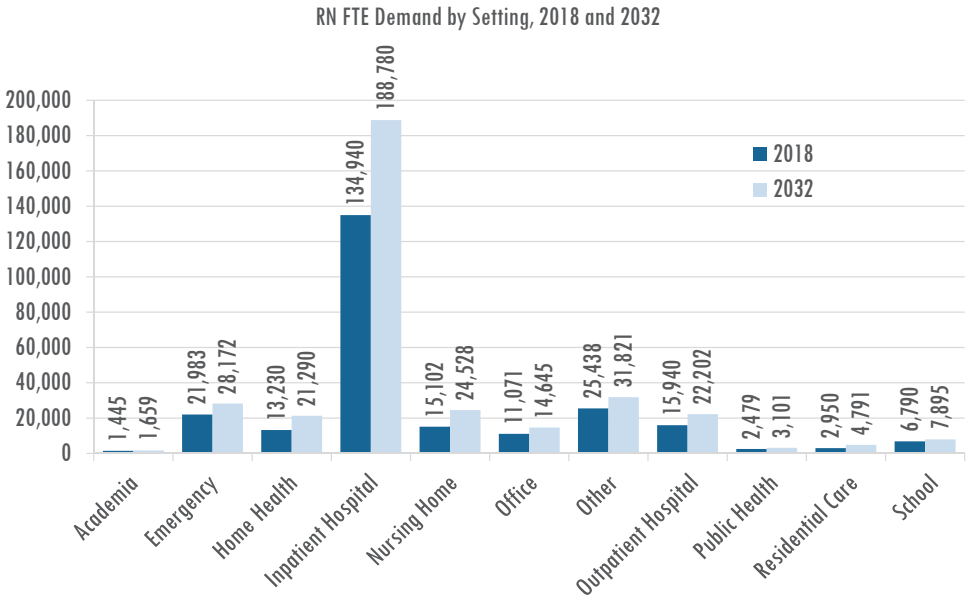


CNM FTE Supply and Demand, 2018-2032



LVN FTE Demand by Setting, 2018 and 2032





Conclusion

Based on Texas-specific data that was applied to the Health Workforce Model, Texas will face a shortage of LVNs, RNs, and CNMs in relation to projected demand for each nurse type by the year 2032. The supply of LVNs is projected to exceed demand between 2018 and 2024 when demand begins to outpace supply of vocational nurses. The supply of NPs and CNRAs is projected to exceed demand for every year between 2018 and 2032. Demand projections are based on current national health care use and delivery patterns. As access to care changes and models of care transform, health care use and delivery patterns may change the demand for nurses over time.

These projections are meant to be used as a planning tool for adequately preparing the future workforce to meet the needs of the Texas population. However, predicting future supply of and demand for nurses is a challenging quest. There are many factors that can influence either supply of or demand for nurses. It is important to keep in mind what the impact will be on demand for health care providers as more people gain health care coverage, as the way people use health care services evolves, as the way health care services are delivered transforms, and as disease prevalence and acuity changes. Likewise, there are a number of factors that can impact supply, such as ability to draw nurses to the workforce and educate them in adequate numbers, and improvements or declines in the economic climate that may drive retirement patterns. There are also factors worth considering that extend beyond just numbers such as such ensuring diversity in the workforce in order to deliver culturally competent care and the geographical distribution of not just nurses but the right combination of nurses to meet demand for needed specializations and skillsets.

For more data, including projections by geographic region and nurse type, visit Texas Health Data at http://healthdata.dshs.texas.gov/dashboard/healthcare-workforce/workforce-supply-and-demand-projections.

For information on the methods used to create these projections, view the full-length report and technical documentation on TCNWS' website at http://www.dshs.texas.gov/chs/cnws/publications/.