

East Central Florida Status Report on Nursing Supply and Demand July 2016



About the East Central Florida Region

Regional Reports

The Florida Center for Nursing was established in statute to address the nurse workforce issues in the state. To that end, the Center collects and analyzes data to evaluate changes in the state's nurse supply and its demand for nurses. This report provides a regional perspective to these topics as well as a demographic summary of the area. Data are current as of 2015.

Community Demographic Information

According to 2014 U.S. Census estimates¹, the population of the East Central Florida region represents 17.4% of the statewide population. Residents of East Central Florida earned an average income of \$63,435. Over 11% of the regional population lives below poverty level, compared to the statewide poverty rate of 12.2%. The largest percentage of residents (14%) are between the ages of 50 and 59, and the median age is 42.3 years. In terms of gender, 48.8% of the regional population are male and 51.2% are female. The majority of residents have obtained a high school diploma and attended some college.

Nurse Workforce

In East Central Florida, RNs remain the largest of the nursing disciplines, and are employed in hospitals more so than any other setting. The majority of RNs specialize in acute and critical care. Since 2010, the number of RN positions have increased overall, particularly in hospitals and home health agencies. The percentage of RNs obtaining MSN degrees and entering retirement has increased in the past five years.

ARNPs have also attained more advanced education and gained a greater workforce presence since 2010, particularly in hospitals. They are employed in hospitals more so than any other setting. The majority of ARNPs specialize in adult and family healthcare and anesthesia. The percentage of black ARNPs has increased since 2011.

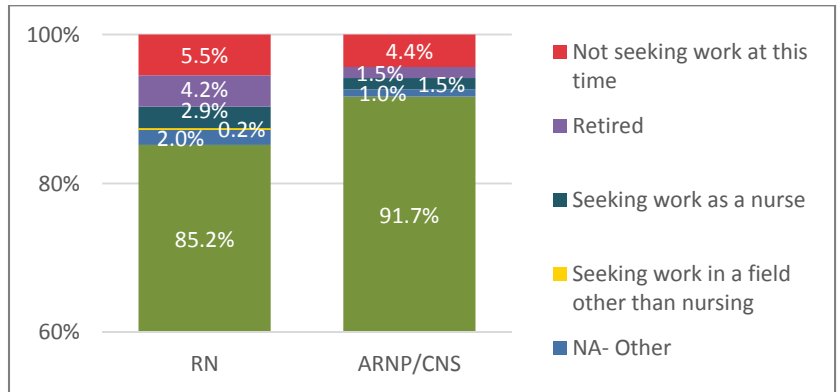
LPNs have experienced the slowest rate of increase. Currently, the majority of LPNs work in long-term care settings, and the greatest number of vacancies are in home health agencies. The majority of LPNs specialize in geriatrics. Since 2010, overall vacancies for LPNs has increased, particularly in hospitals and home health agencies.

The Supply of Nurses¹

Change in the Potential Nurse Workforce

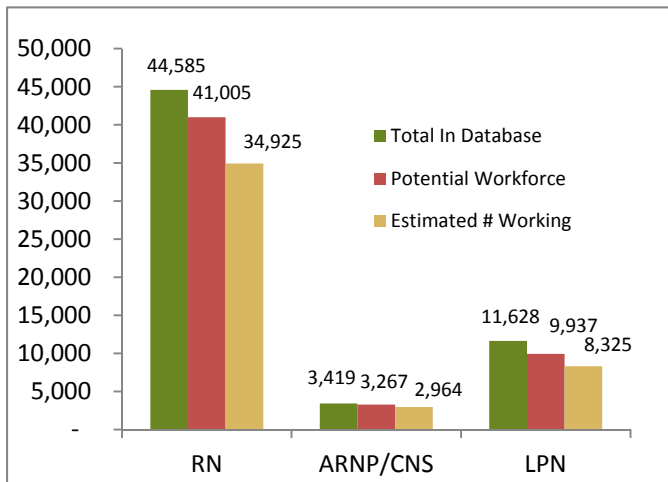
	2013	2015	% Change
RN	32,516	34,925	7.4%
ARNP/ CNS	2,341	2,964	26.6%
LPN	8,004	8,325	4.0%

RN & ARNP Work Status (%), 2014 - 2015

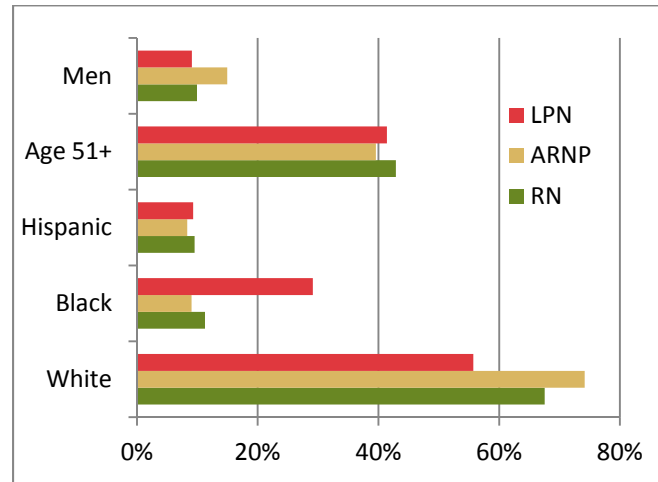


The RN, ARNP, and LPN potential workforce (those with an active license, eligible to practice, and with a Florida address) increased since 2013, with the greatest growth occurring for ARNPs. About 85% of RNs were currently employed in a nursing position, and 3% were seeking nursing employment. Nearly 92% of ARNPs were employed in nursing. In the past five years, the percentage of RNs entering retirement has increased.

Nurse Supply as of December, 2015

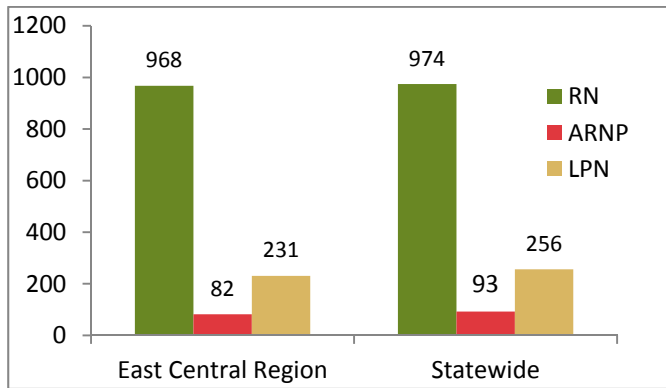


Nurse Workforce Demographics



East Central Florida had a potential RN supply of 41,005 nurses, but only 34,925 (85%) were actually working in nursing. Among working nurses, 9.9% of RNs, 15.0% of ARNPs, and 9.1% of LPNs were men; and over 65% of all nurses were white. In terms of age, 42.9% of RNs, 39.6% of ARNPs, and 41.4% of LPNs were age 51 and older. Since 2011, the percentage of black ARNPs increased.

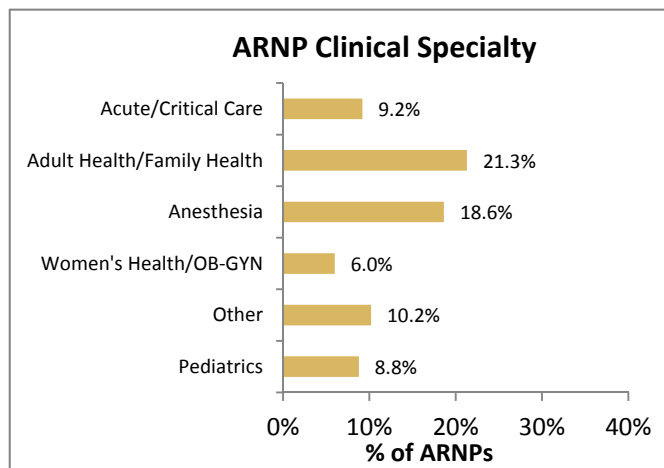
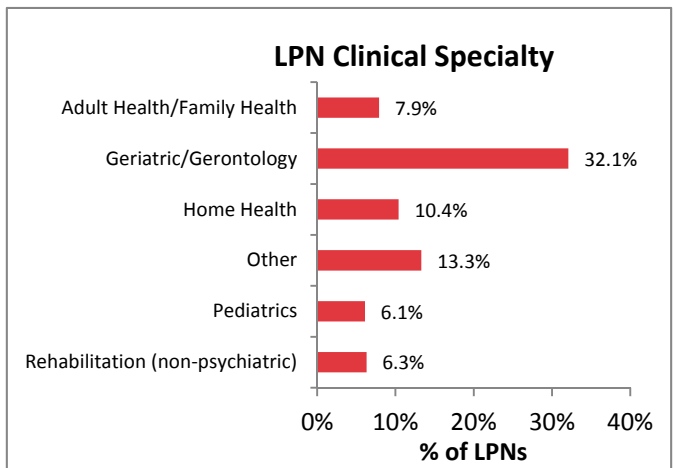
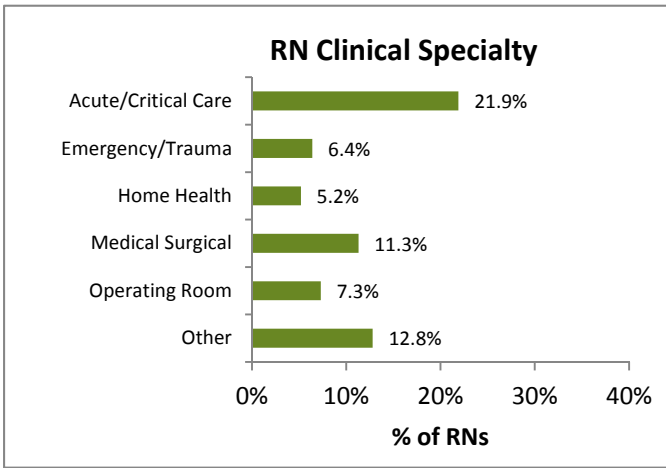
Employed Nurses per 100,000 Population



% of Nurses Employed by Setting, 2015

Setting	RN n=34,925	ARNP n=2,964	LPN n=8,325
Hospital	64.7%	45.1%	6.6%
Long-Term Care	5.1%	2.4%	41.6%
Home Health	5.8%	1.4%	14.2%
Physician's Office	2.7%	24.9%	10.2%
Other	5.0%	4.4%	6.4%
Ambulatory Care	4.5%	6.1%	2.1%
Hospice	3.3%	0.8%	6.8%

As of December 2015, East Central Florida had less RNs, ARNPs and LPNs per 100,000 population than did the state. However, the proportion of ARNPs has increased in the past five years. About 65% of RNs and 45.1% of ARNPs were employed in hospitals. One fourth of ARNPs were employed in physician's offices. Most LPNs (41.6%) were employed in long-term care facilities. While the percentage of ARNPs employed in a hospital setting has increased since 2010, the percentage of LPNs in this care setting has declined.



Highest Education Degree among Employed Nurses

Highest Degree Held	RN	ARNP
Diploma/Associate	45.1%	2.0%
BSN	39.5%	13.1%
Bachelor's Non- Nursing	8.1%	1.0%
MSN	5.2%	77.9%
Master's Non-Nursing	1.7%	1.0%
Doctorate in Nursing	0.2%	4.9%
Doctorate Non-Nursing	0.2%	0.0%

In East Central Florida, 21.9% of RNs specialized in acute and critical care. 32.1% of LPNs specialized in geriatrics. 21.3% of ARNPs specialized in adult and family healthcare, and 18.6% specialized in anesthesia. In terms of education, the majority of RNs held a diploma, Associates, or BSN degree. The number of RNs holding MSNs has increased since 2010. About 78% of ARNPS held MSNs. Since 2010, the percentage of ARNPs holding a diploma, Associate's, non-nursing Master's degrees has decreased. The percentage of ARNPs holding BSNs and Doctorate's in nursing increased over time.

Progress is being made toward achieving the Institute of Medicine's recommendation 4 to increase the proportion of employed RNs with a BSN to 80% by 2020. Currently, 46.8% of working RNs in the region meet this recommendation; up from 39.7% in 2011.

The Demand for Nurses²

Estimated Number of Full and Part-Time Vacancies as of 06/30/2015

	Estimated # RN Vacancies	Estimated # LPN Vacancies
Hospitals	1507.0	28.2
Skilled Nursing*		
Home Health	652.1	632.3
Hospice	30.0	2.0
Public Health	11.0	18.8
Psychiatric*		
Total	2200.1	681.3

Estimated Full and Part-Time Position Growth through 2016

	RN Position Growth	LPN Position Growth
Hospitals	582.6	4.0
Skilled Nursing*	0.0	0.0
Home Health	1531.5	1124.7
Hospice	16.2	3.1
Public Health	0.5	0.0
Psychiatric*	0.0	0.0
Total	2130.8	1131.8

* Data for Skilled Nursing Facilities and Psychiatric Facilities not reported due to low response rates

In East Central Florida, most of RN vacancies were within hospitals and home health agencies. The number of vacancies have increased overall since 2010, particularly in hospitals and home health agencies. The majority of LPN vacancies were in home health agencies. In the past five years, LPN vacancies have increased overall, particularly in hospitals and home health agencies. An estimated 2,131 new RN positions and 1,132 new LPN positions may be created in East Central Florida through 2016. Most of the new RN and LPN positions will be created in home health agencies. Since 2010, RN position growth in hospitals has increased, while position growth in hospices and public health agencies has declined. Most of the new LPN positions will be created in home health agencies. In the past five years, overall LPN position growth increased, particularly in home health agencies. Further, LPN position growth declined in hospices.

There were too few skilled nursing and psychiatric hospital respondents in the East Central region to provide reliable estimates for these industries. Additionally, due to the low response rate of the Nursing Demand Report, data related to vacancy rates and turnover rates are not reported at the regional level.

For more information:

1. Source: U.S. Census Bureau, 2010-2014 American Community Survey 5-Year Estimates
2. Nurse Supply Reports, <http://www.flcenterfornursing.org/StatewideData/NurseSupplyReports.aspx>
3. Nurse Demand Reports, <http://www.flcenterfornursing.org/StatewideData/NurseDemandReports.aspx>