

Insights and Trends in Allied Healthcare

healthcare
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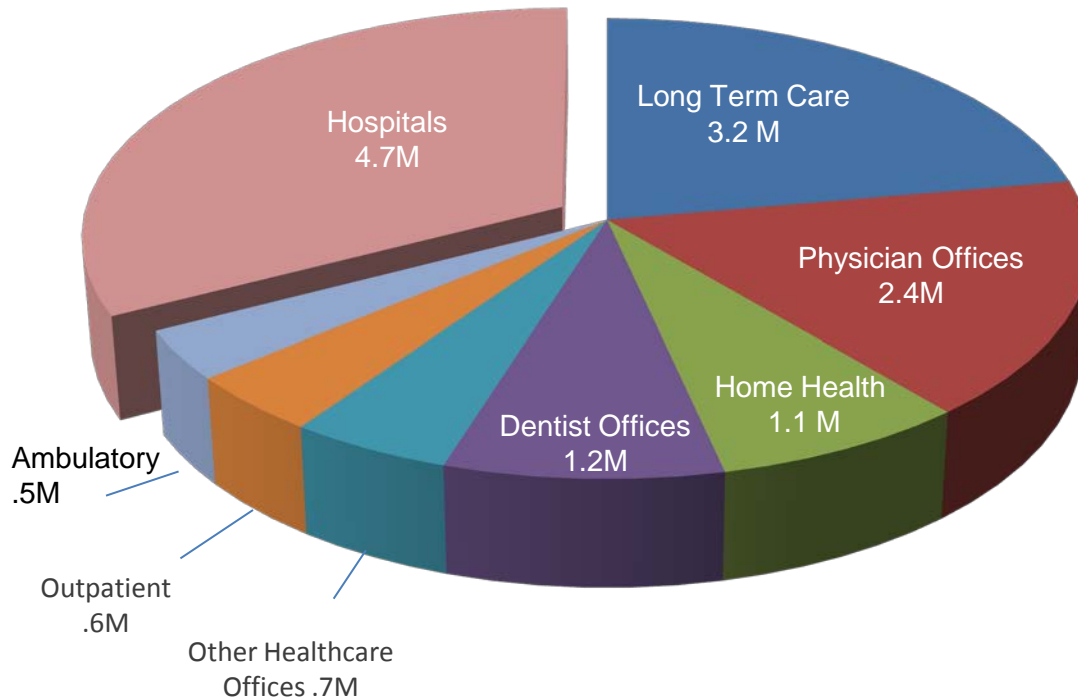


Insights and Trends in Allied Health Care Staffing

Agenda

- Overview
- Where We've Been in Allied
- Key Trends and Issues
- Outlook
- Questions

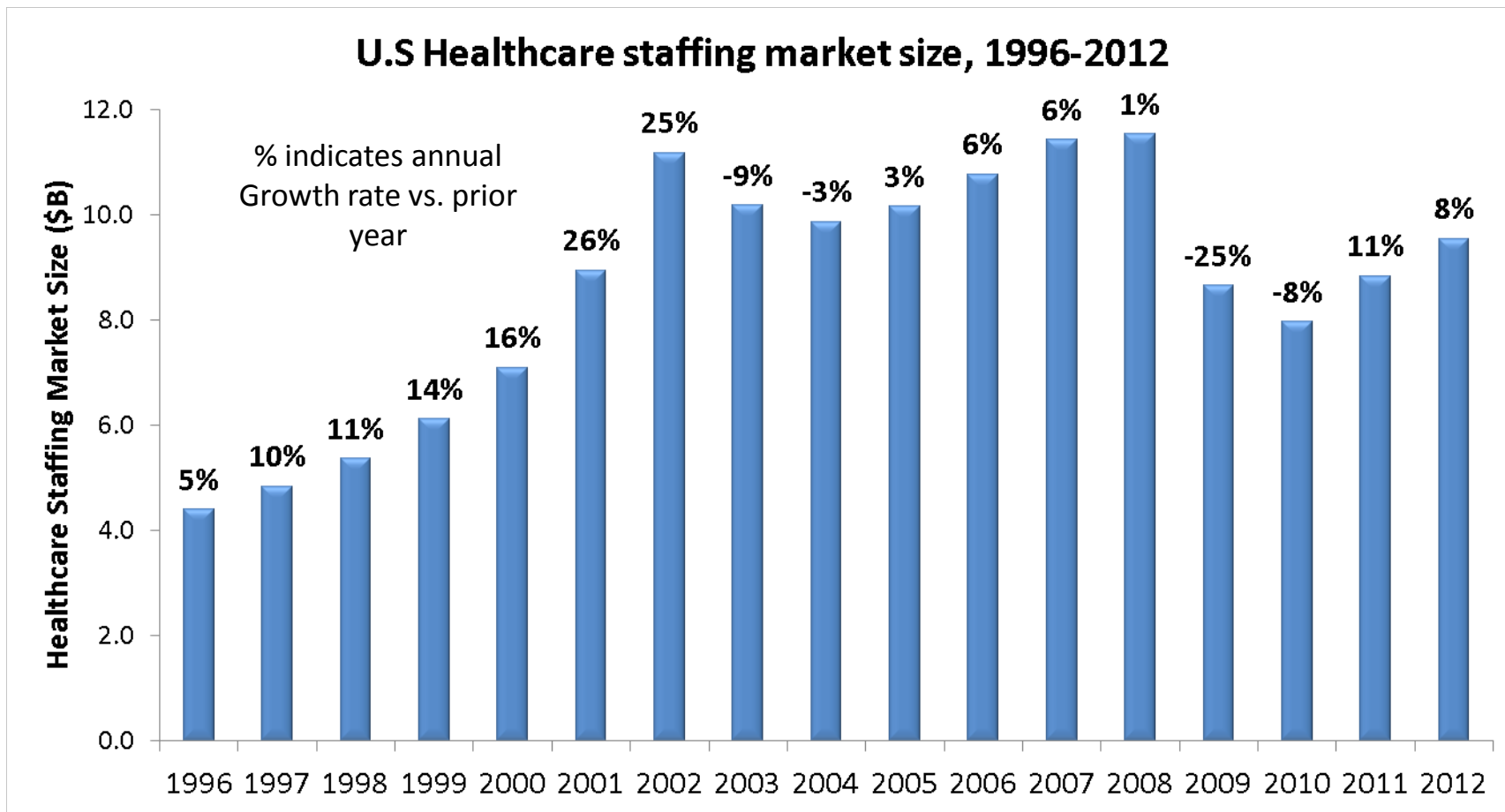
Healthcare Employment in the Industry



- 14 Million people employed in the Healthcare Industry in the United States
- Includes non-medical personnel
- Hospitals employ 34% of the total
- Healthcare Staffing projected to be a 9.5 billion dollar industry in 2013

Source: Bureau of Labor Statistics, 2011 industry report

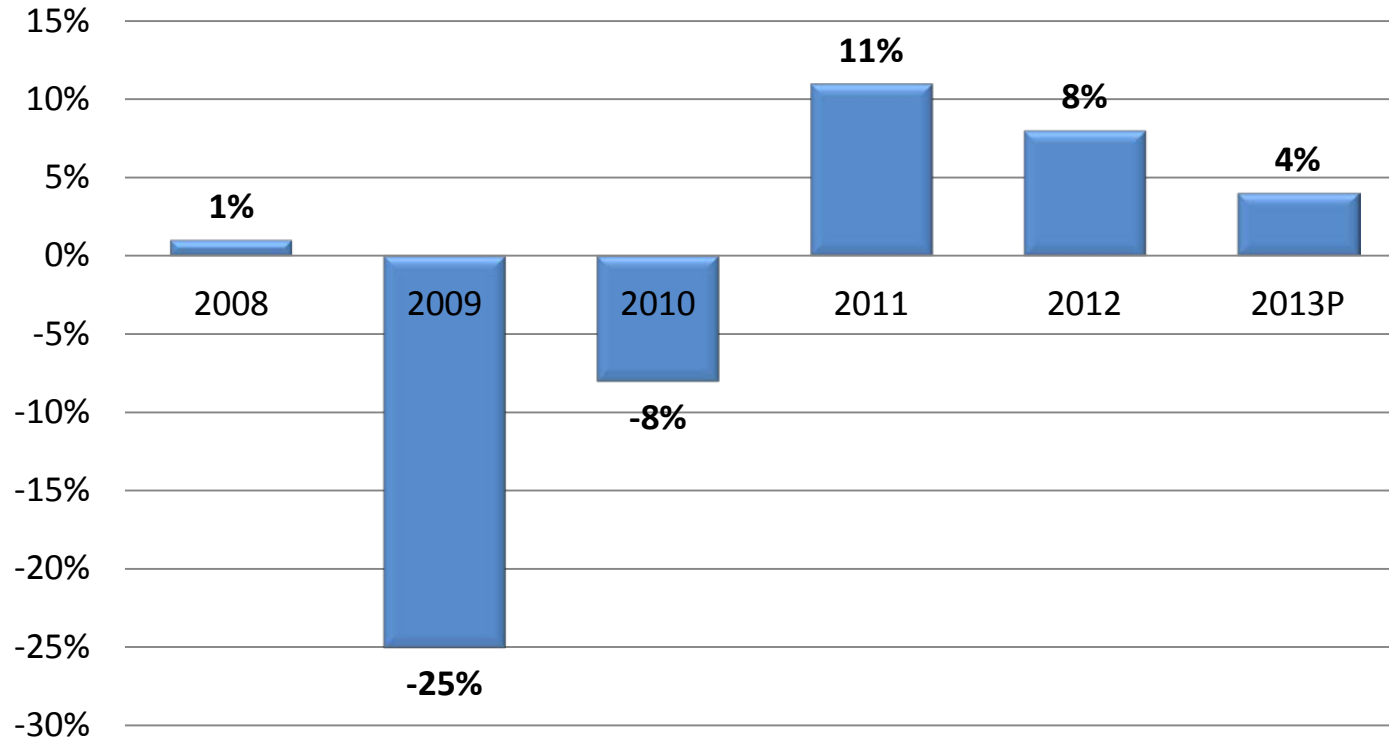
Historical Growth of Healthcare Staffing



Source: SIA U.S. Staffing Industry Forecast (September 2013)

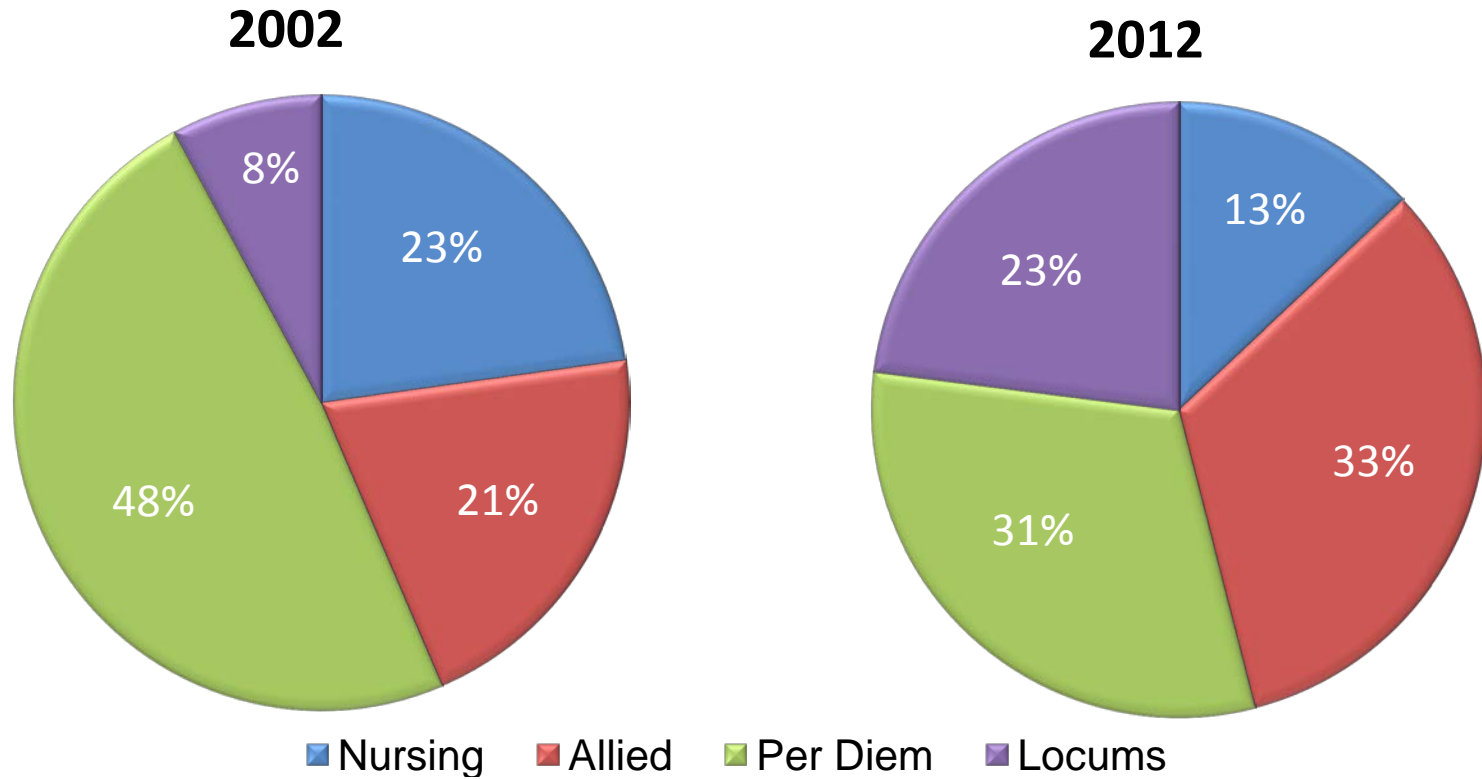
2013 Low Growth For Healthcare Staffing

US Healthcare Staffing Revenue Growth



Source: Bureau of Labor Statistics, 2011 industry report

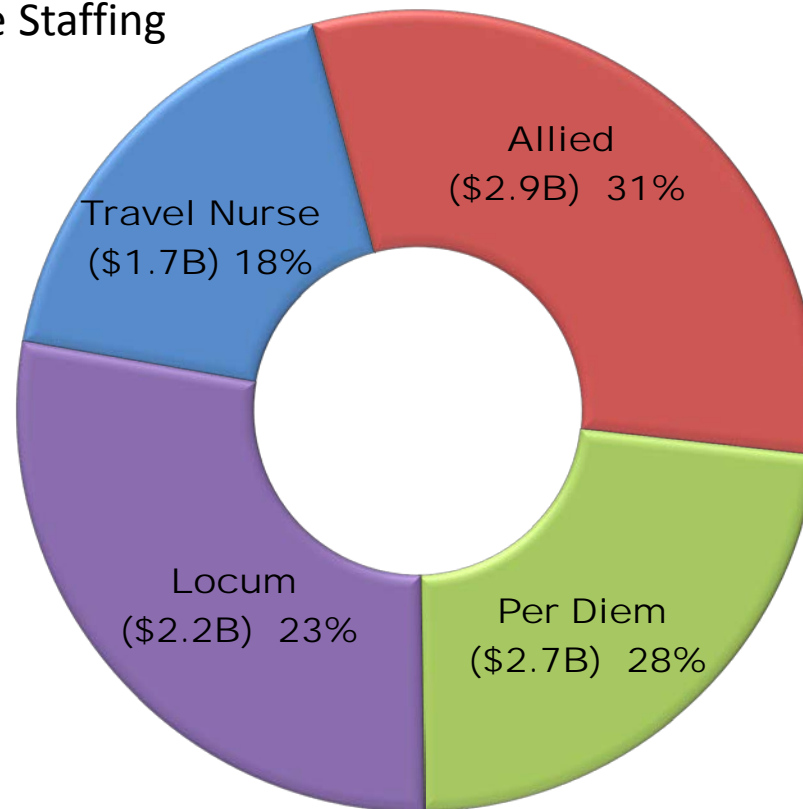
Health Care Professions



Source: Staffing Industry Analysts

Allied and Locum Tenens About Half of the US Healthcare Staffing Market

2012 US Healthcare Staffing
by Segment



Source: SIA U.S Staffing Industry Forecast (September 2013)

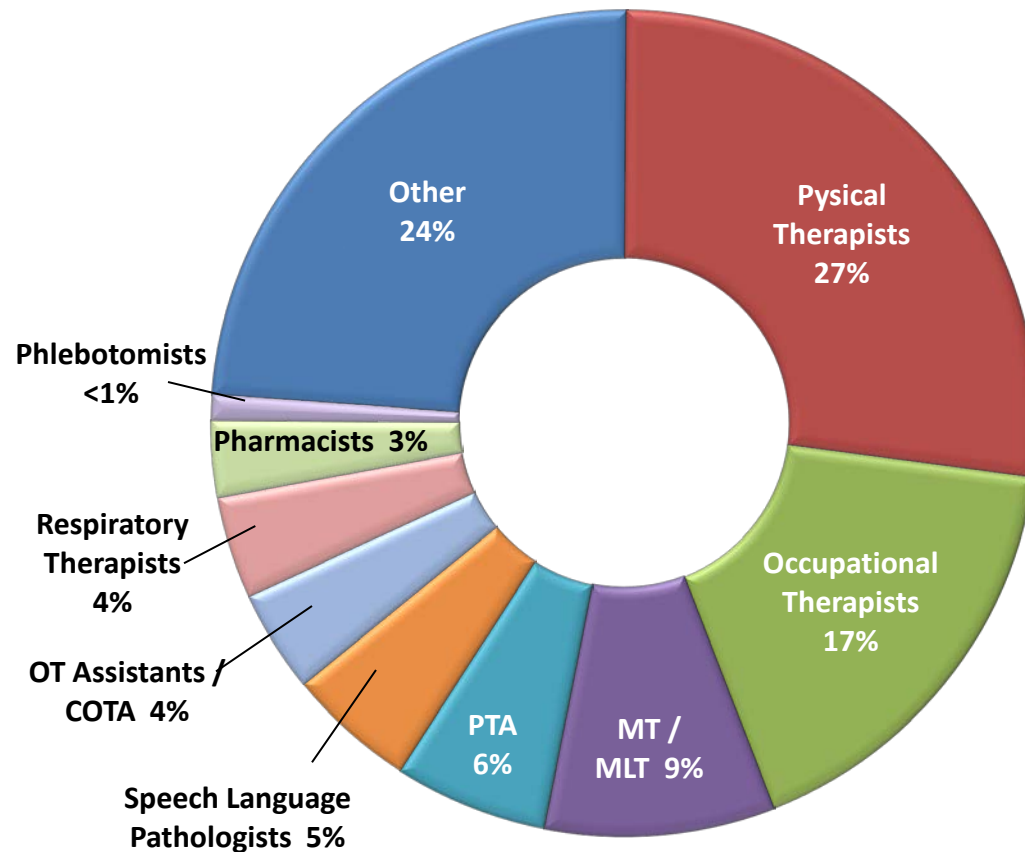
Allied Health Professions

Allied Health is used to identify a cluster of health professions, encompassing as many as 200 health careers:



- 5 million allied health care providers in the U.S.
- More than 80 different professions
- Approximately 33% of all health care providers work in the allied space
- Allied health is involved (directly or indirectly) with patient health

Allied Benchmark Survey Highlights Weakness



\$416M in Annualized Revenue (15% of the market)

Therapy Current State

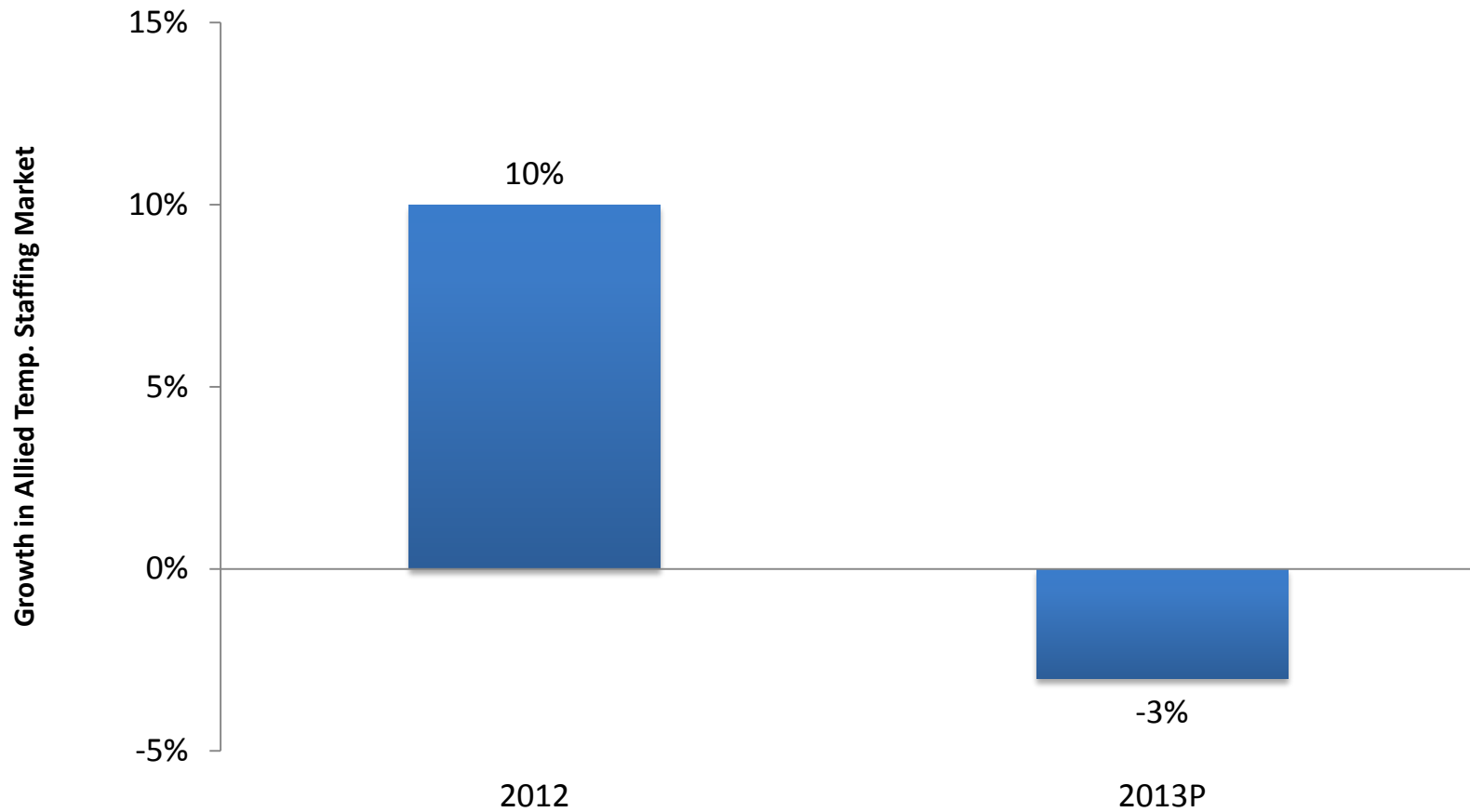
Impact of Legislation:

4 major changes listed below make up the majority of the impact:



October 1, 2012	Claims that meet or exceed \$3,700 will be subject to a manual medical review.
January 1, 2013	New reporting requirements
March 1, 2013	Sequestration
April 1, 2013	Multiple Procedure Payment Reduction (MPPR)

Allied Health Growth Forecast Down in 2013



Source: SIA U.S Staffing Industry Forecast (September 2013)

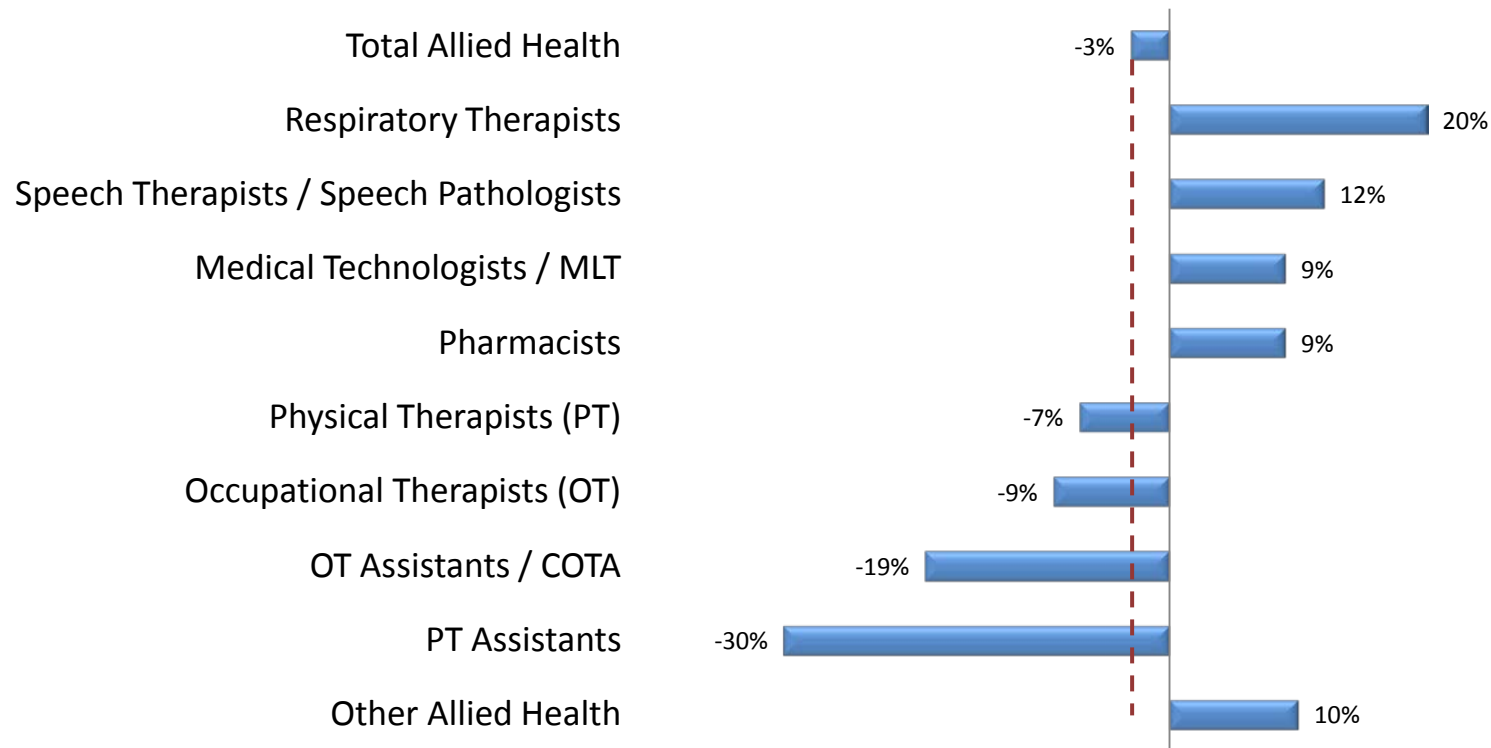
Allied Health Pulse Shows Recent Deceleration in Growth



Source: SIA Staffing Industry Pulse Survey (September 2013)

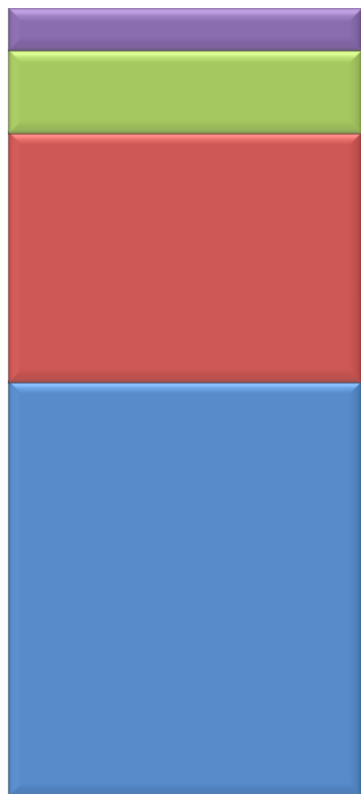
Allied Benchmark Survey Highlights Weakness

Allied Health Revenue Growth 1H13/1H12



Source: SIA 2013 Allied Health and Advanced Practice Benchmarking Survey

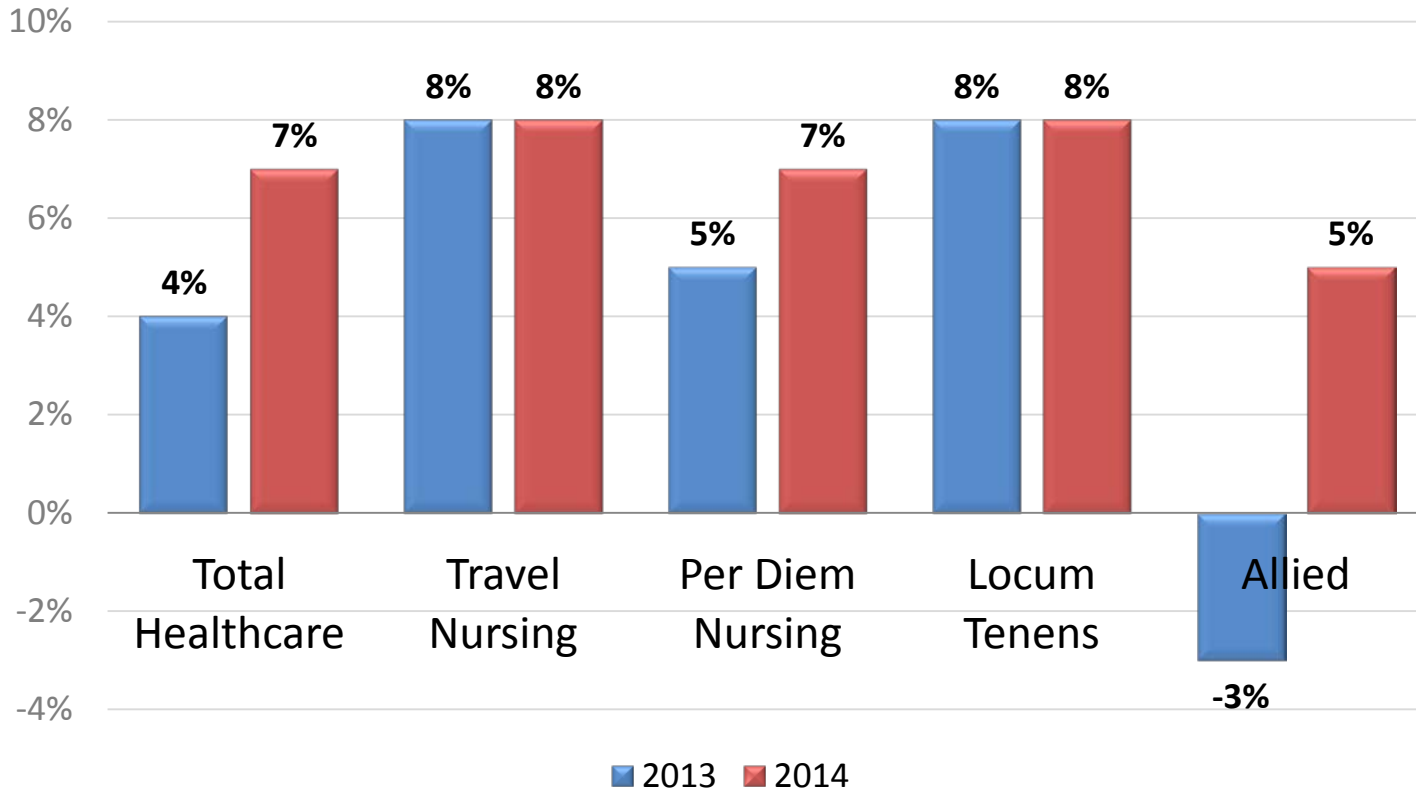
U.S. staffing market for PT and OT about \$1 billion



- OT Assistants: ~ \$50 million
- PT Assistants: ~ \$100 million
- Occupational Therapists: ~ \$300 million
- Physical Therapists: ~ \$500 million

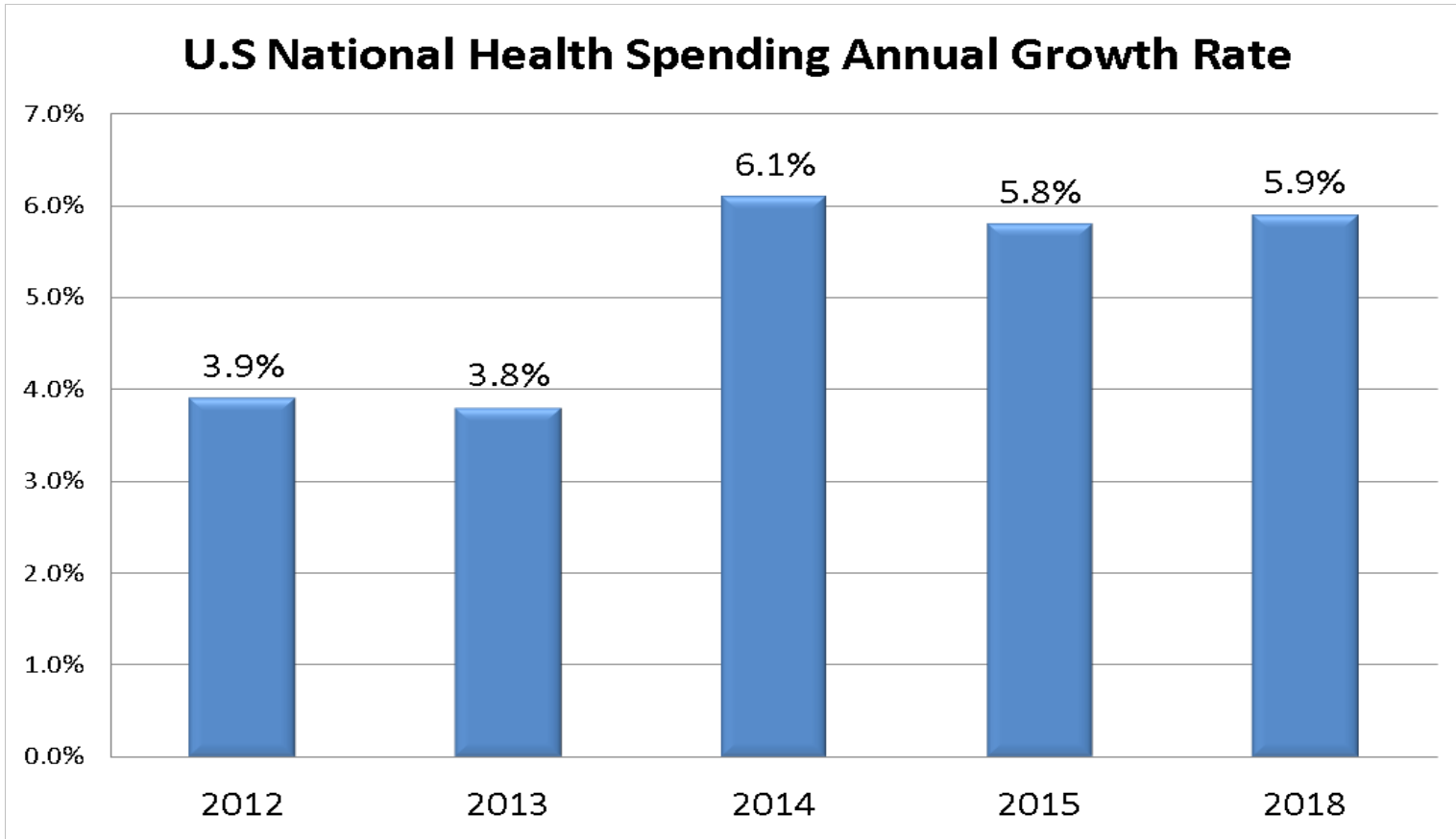
2014 Forecast Shows Improvement

Healthcare Staffing Growth Estimates and Forecast



Source: SIA U.S. Staffing Industry Forecast (September 2013)

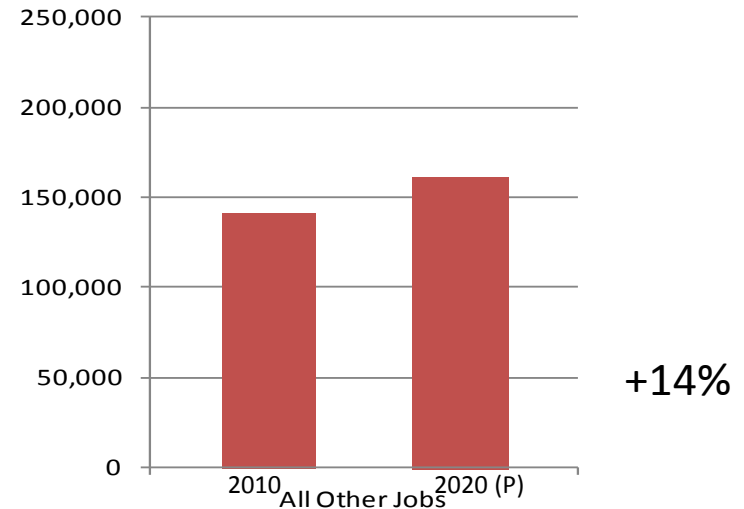
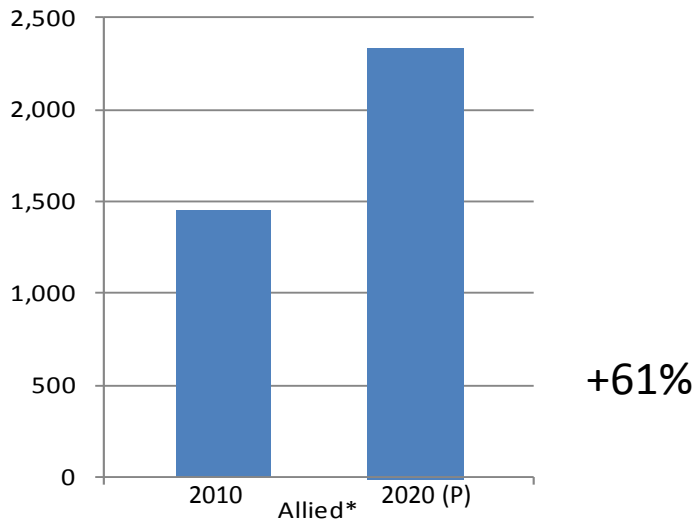
US Health Spending to Rise Significantly



Source: National Health Expenditure Projections, Health Affairs, October 2013

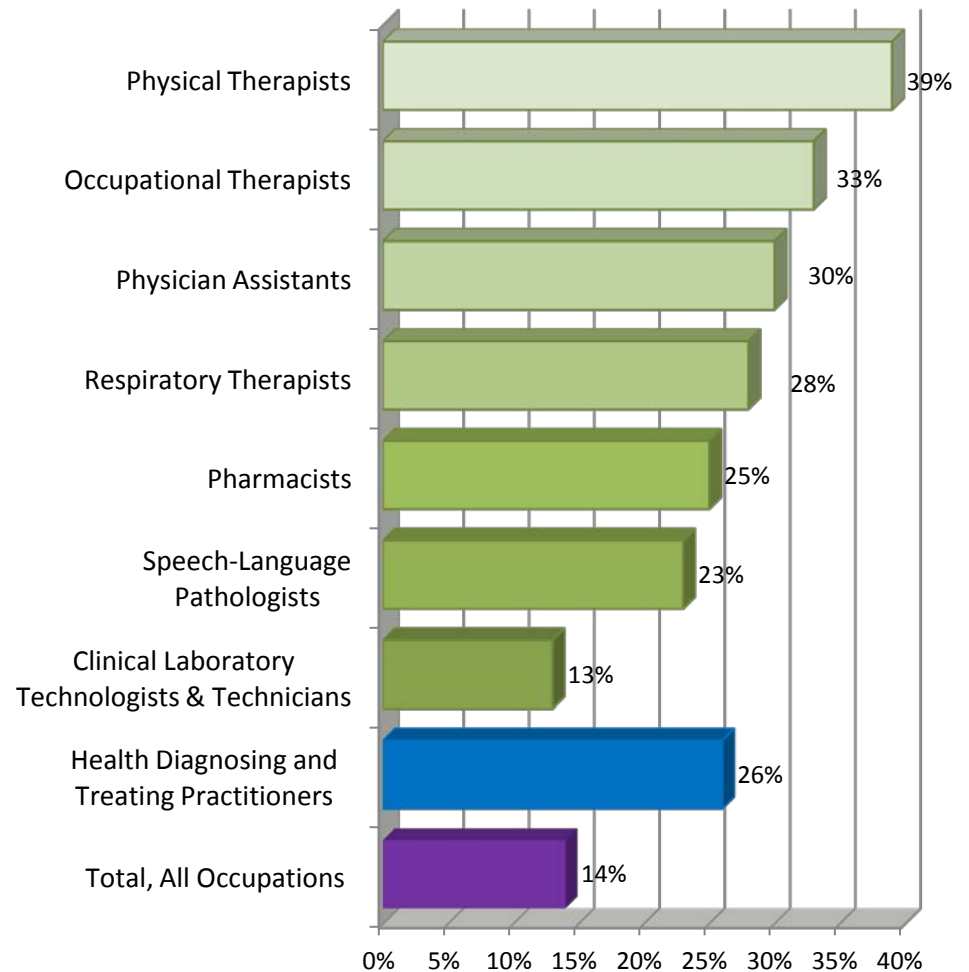
Allied Health Professions

According to the US Bureau of Labor and Statistics, Allied healthcare jobs are projected to grow at a significantly higher rate than all other job categories between 2010 - 2020.



Source: Employment Projections Program, U.S. Department of Labor, U.S. Bureau of Labor Statistics.

Projected Outlook of Top Allied Occupations



Source: Employment Projections Program, U.S. Department of Labor, U.S. Bureau of Labor Statistics.

Allied Q&A

