
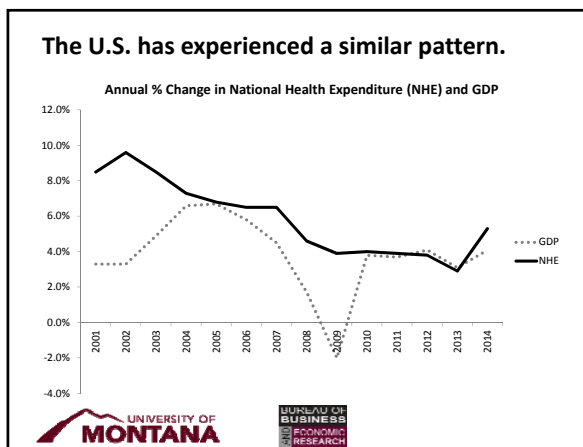
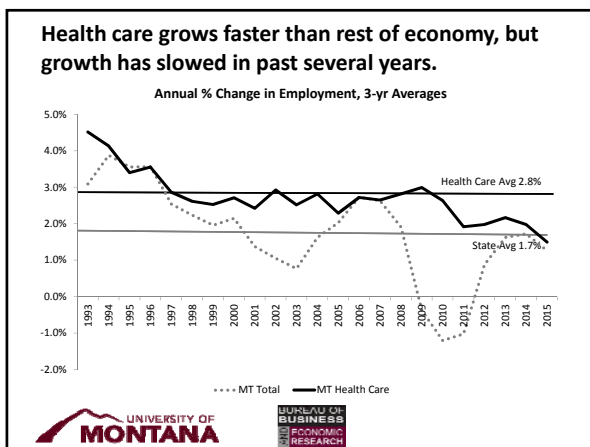
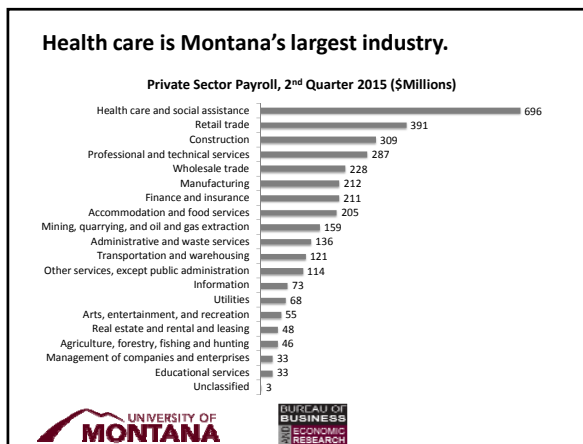
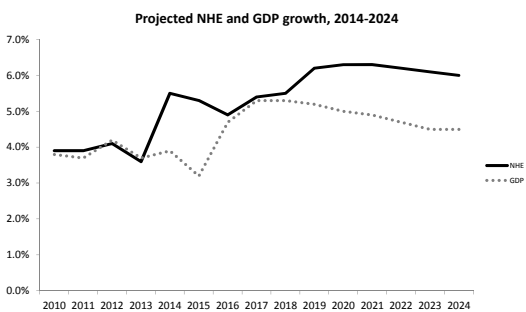


## Health Care in Montana: The next 10 years

Bryce Ward

**Health care spending is projected to return to historic levels.**

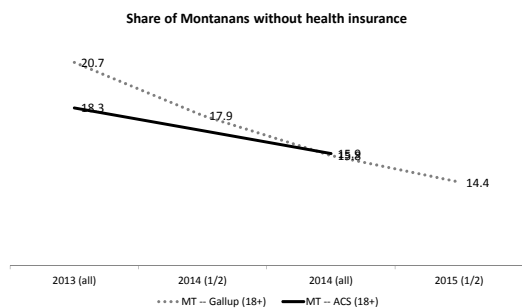


**Sources of health care growth in MT**

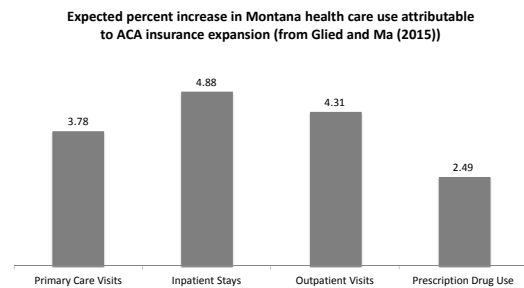
- (1) Insurance expansion
- (2) Aging
- (3) Health care innovation



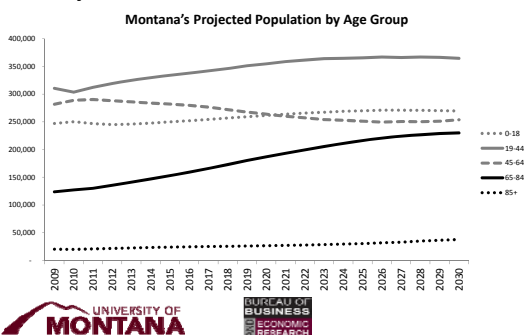
**More Montanans have health insurance.**



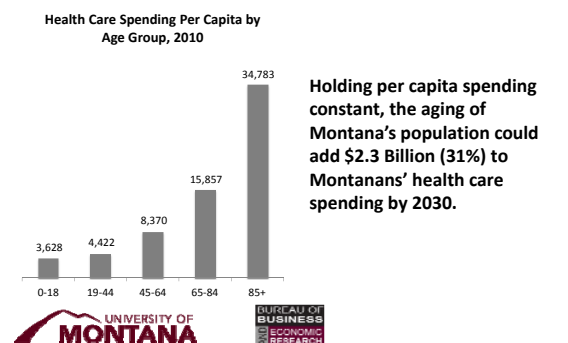
**More people with insurance leads to more health care use.**



The share of Montana's population over age 65 is expected to grow from 17% to 23% over next 10-15 years.



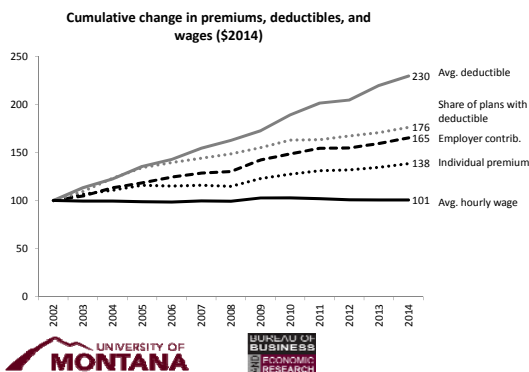
Older people spend substantially more on health care.




### The big unknown

- Will health care spending per capita grow, shrink or remain constant?
  - Will price growth be contained?
  - Will unnecessary care be reduced?
  - How will the technology used to produce health care change?

### High per capita health care costs squeeze budgets.




### What does likely growth health care spending mean for Montana's health care sector and Montana's economy?



### Montana will need more health care workers.

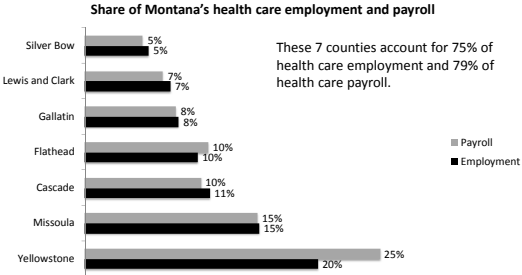
Projected change in employment and total job openings for health care occupations by education required

Education Required	2014 Employment	Projected emp. increase through 2024	Job openings due to growth and replacement	Projected increase as % of 2014 emp.	Projected openings as % of 2014 emp.
Total	40,100	6,727	15,557	17%	39%
Doctoral/Professional	5,390	844	2,177	16%	40%
Master's	1,850	509	933	28%	50%
Bachelor's	10,890	1,675	4,190	15%	38%
Associate's	3,430	593	1,241	17%	36%
Postsecondary training	13,930	2,406	5,470	17%	39%
High School	4,610	701	1,547	15%	34%




### Where will health care grow?

Share of Montana's health care employment and payroll



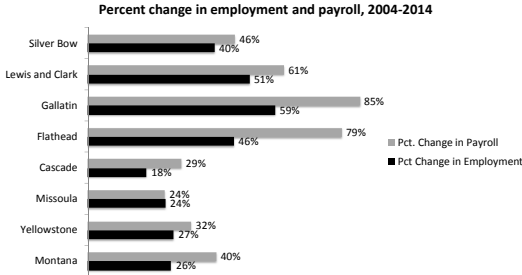
These 7 counties account for 75% of health care employment and 79% of health care payroll.

County	Payroll (%)	Employment (%)
Silver Bow	5%	5%
Lewis and Clark	7%	7%
Gallatin	8%	8%
Flathead	10%	10%
Cascade	10%	11%
Missoula	15%	15%
Yellowstone	20%	25%



### Montana's smaller cities have grown faster over the past 10 years.

Percent change in employment and payroll, 2004-2014



County/State	Pct. Change in Payroll (%)	Pct. Change in Employment (%)
Silver Bow	46%	40%
Lewis and Clark	51%	61%
Gallatin	59%	85%
Flathead	46%	79%
Cascade	18%	29%
Missoula	24%	24%
Yellowstone	32%	27%
Montana	26%	40%

