

HEALTH CAREERS

Montana 406 JOBS Sector Analysis



Montana Department of
LABOR & INDUSTRY





State of Montana

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EXECUTIVE SUMMARY

Montana's healthcare industry provides vital care to Montanans and helps to ensure a healthy and productive workforce. The healthcare industry has been a steady source of employment growth over the last decade, with growth accelerating in recent years due to the state's aging population and rapid growth in Montana's population and economy. Healthcare is Montana's largest industry in terms of jobs, with the industry reporting a higher average annual wage than the statewide average.

The 406 JOBS initiative, established by Governor's executive order in August 2025, identifies Health Careers as a critical sector of the Montana economy. Health Careers encompass employment in a variety of healthcare settings – including hospitals, out-patient services, primary care, mental health, dentistry, and public health. Jobs in the Health Careers sector include healthcare practitioners, technical, assisting, and administrative roles. These occupations require a wide range of skills, with most requiring some postsecondary degree, certification, or license. Ensuring the state's education and training programs have sufficient capacity to train the Health Careers workforce will be essential for continued growth. This report provides an in-depth analysis of the healthcare labor market and identifies workforce training needs to ensure a strong pipeline of skilled workers for Montana's Health Careers sector. Highlights include:

- In 2024, there were over 74,670 Health Career jobs in Montana – comprising 15% of all jobs statewide.
 - Hospitals and ambulatory care are the two largest subsectors of the Health Careers sector. Ambulatory care includes outpatient clinics, such as physician and dental offices.
 - Health Career employment is concentrated around the state's urban centers, with a third of these healthcare jobs in Yellowstone and Missoula Counties.
- Health Career jobs pay above the statewide average, reporting \$67,740 average annual wage in 2024 compared to \$60,037 statewide.
 - Real wage growth has averaged 1.0% per year since 2019, growing faster than the cost of living and suggesting an increase in standard of living for healthcare workers.
- Montana's Health Career workforce has expanded steadily over the last decade, averaging 1.5% growth per year.
 - An aging population and strong in-migration led to a slight acceleration of healthcare employment growth in recent years.
 - Healthcare job growth over the last five years has been concentrated in urban counties of the state, driven by population growth. Many rural counties lost healthcare jobs over the last five years.
- The Health Careers sector is projected to add 980 new jobs per year through 2034 – the most of any industry.
- MTDLI estimates over 8,500 annual job openings in the Health Careers sector over the next ten years in a variety of different roles, primarily to replace workers who leave the industry.
 - About half of these projected job openings in the Health Careers sector will require a certification or college degree.
 - Over 50% of all healthcare job openings are projected to occur in one of ten occupations – including home health and personal care aids, nurses (CNAs and RNs), medical and dental assistants, counselors, and support occupations like administrative assistants and cleaners.

Montana's Health Careers sector is essential to the state economy, employing a significant portion of the workforce in high-paying jobs. Efforts to recruit, train, upskill, and retain healthcare workers will be important to ensure the Health Careers sector can continue to provide vital care for Montana's growing and aging population.

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INTRODUCTION

Montana's healthcare industry provides vital care to the state's growing and aging population, helping to ensure a healthy and productive workforce. More Montanans are employed in healthcare than in any other industry in the state, often in high-wage jobs requiring significant levels of training and education. The Governor's 406 JOBS initiative identifies the Health Careers sector – including hospital, mental health, primary care, dentistry, community and public health services – as a critical component of the state economy. The Health Careers sector is projected to grow over the next decade as a larger and older population will demand more healthcare services. Workforce training efforts targeted at the state's Health Careers sector will be vital to ensure the sector can continue to grow. This report provides an in-depth analysis of the healthcare labor market and identifies workforce training needs to ensure a strong pipeline of skilled workers for Montana's Health Careers sector.

SECTOR DEFINITION

Health Careers in the 406 JOBS Initiative

The Health Careers sector, as defined by the 406 JOBS initiative, includes the following industries in the North American Industry Classification System (NAICS):

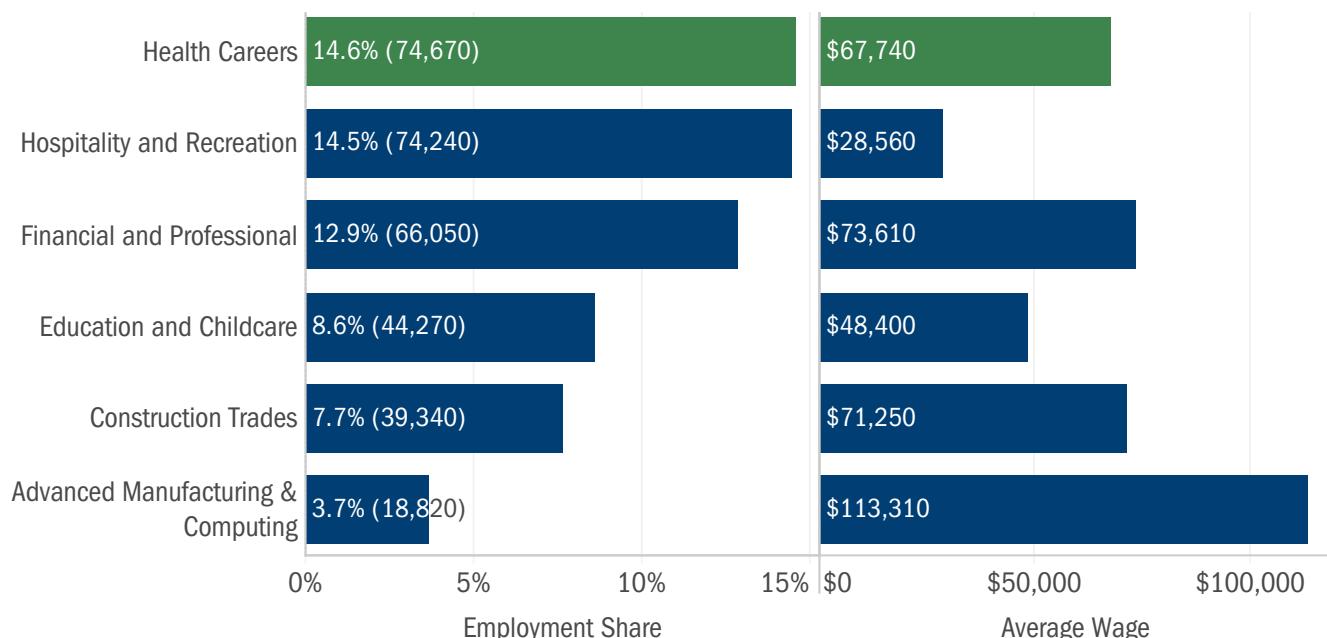
- **Ambulatory care**, such as physician, dentist, and other health practitioner offices, and other outpatient care centers (NAICS 621)
- **Hospitals** (NAICS 622)
- **Nursing and residential care facilities** (NAICS 623)
- **Social assistance**
 - **Individual and family services**, such as counseling, crisis intervention, family social support, and support for mental health and substance abuse (NAICS 6241)
 - **Community food and housing, and emergency and other relief services**, addressing critical needs to vulnerable populations that directly impact individual and community health outcomes (NAICS 6242)
 - **Vocational rehabilitation services** (NAICS 6243)

Health Careers differ from the traditional healthcare industry, which is defined as the entire NAICS 62 industry. Health Careers excludes child day care services (NAICS 6244). The 406 JOBS Initiative includes child day care services in a separate Education and Childcare sector.

HEALTHCARE LABOR MARKET OVERVIEW

Montana's Health Careers sector is a major contributor to the state's labor market. There are over 74,000 jobs in this sector. About 15% of Montana's employment is in Health Careers, the same as the sector's employment concentration nationally. These healthcare jobs pay above the statewide average, reporting an average annual wage of \$67,740 in 2024 compared to \$60,000 across all Montana jobs. Figure 1 shows the number of jobs and average annual wages for the 406 JOBS sectors.

FIGURE 1: EMPLOYMENT AND WAGES BY 406 JOBS SECTOR, 2024



Source: BLS QCEW, Includes both private sector and government. Health Careers exclude childcare.

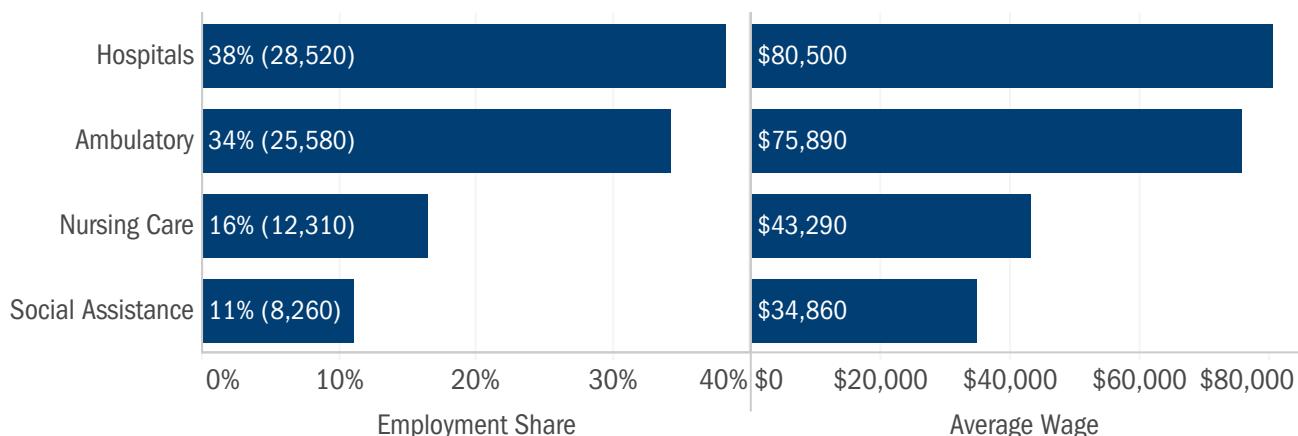
The Health Careers sector is made up of four subindustries – hospitals, ambulatory health care services, nursing and residential care facilities, and social assistance.¹ The number of jobs and average annual wages by subindustry are shown in Figure 2. Hospitals and ambulatory care are the largest subindustries, making up over 70% of all Health Career jobs. Workers employed in these settings earn \$80,500 and \$75,890 on average, respectively. High wage occupations are prevalent in hospitals and ambulatory care facilities – including registered nurses, nurse practitioners, physician assistants, physicians, physical therapists, dentists, and dental hygienists.

The Health Careers sector includes healthcare businesses and other healthcare establishments. These establishments rely on a variety of jobs, including:

Traditional healthcare careers: nurses, physicians, dental hygienists, dentists, phlebotomists, medical assistants, personal care aids, physical therapists, pharmacists, occupational therapists, speech-language pathologists, etc.

Non-healthcare jobs like administrative support, food preparation, transportation, and maintenance occupations.

FIGURE 2: EMPLOYMENT AND WAGES BY HEALTH CAREER SUBINDUSTRY, 2024



Source: US BLS QCEW, Includes both private sector and government. Social assistance excludes childcare.

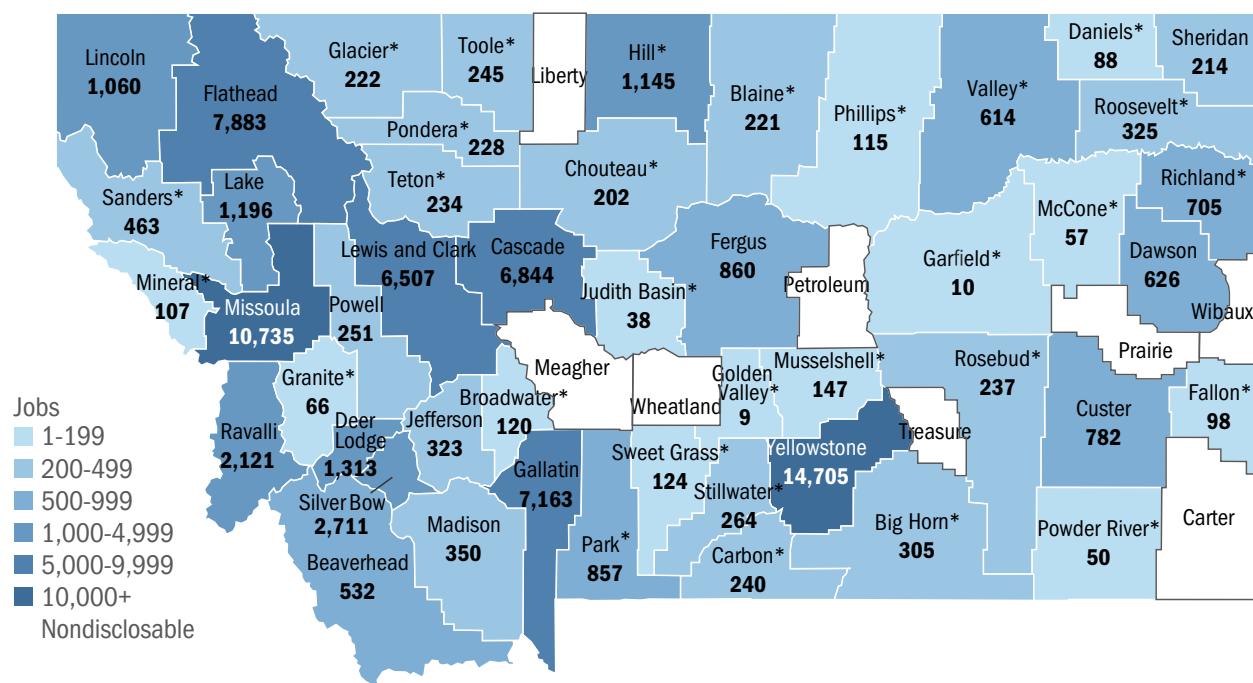
Nursing and residential care facilities make up about 16% of all Health Career jobs, a similar share as the national average. Nursing and residential care workers earn an average of \$43,290 annually. These facilities employ a lot of healthcare support and assistant occupations, which brings down the average salary. About 40% of all workers in nursing and residential care facilities are nursing assistants or home health and personal care aids. Only about 9% of jobs are filled by healthcare practitioners and other technical occupations, which typically earn higher salaries.

Social assistance organizations comprise the smallest share of Health Careers employment. About 11% of Health Career jobs are in social assistance organizations providing services that directly impact individual and community health outcomes. These organizations employ counselors, social workers, social service assistants, social service managers, and home health and personal care aids. Most social assistance employment (72%) is concentrated in individual and family service organizations that provide counseling, crisis intervention, family social support, youth services, and support for mental health and substance abuse. Another 14% of social assistance jobs are in community food and housing, and emergency and other relief services. These organizations provide public health and critical services to Montana's most vulnerable population. The remaining 14% of jobs are related to vocational rehabilitation services.

Employment in Montana's Health Careers sector tends to be concentrated in and around the state's urban centers, particularly in cities like Billings and Missoula where just over one-third of all healthcare jobs are found. Types of healthcare providers vary by county. Yellowstone County has a prominent hospital system that generates a large share (46%) of the county's healthcare employment. Missoula County has a higher-than-average share of jobs (48%) in ambulatory care, as do Gallatin County (46%) and Flathead County (41%). Figure 3 shows the number of Health Career jobs in each county in 2024.



FIGURE 3: HEALTH CAREERS SECTOR EMPLOYMENT IN MONTANA COUNTIES, 2024

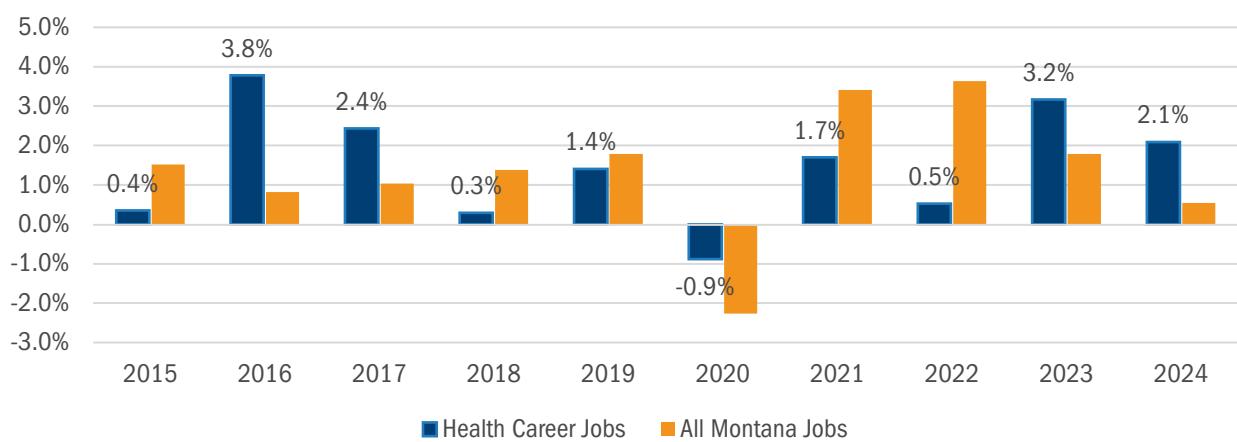


Source: US BLS QCEW, Includes both private sector and government. Health Careers excludes childcare. *indicates healthcare jobs estimated by multiplying county healthcare jobs (naics 62) by 0.956, Montana's share of healthcare jobs excluding childcare subindustry (NAICS 6244). Counties in white are nondisclosable.

HEALTHCARE LABOR MARKET TRENDS

The Health Careers sector has been one of the most consistent sources of job growth in the state. Over the past decade, these healthcare jobs averaged 1.5% growth per year and accounted for 15% of total job growth. The Health Careers sector has only recorded annual job declines once over the last twenty-five years – in 2020 during the pandemic-recession. Job growth in healthcare has picked up over the last few years due to post-pandemic economic growth, an aging population, and strong migration. Figure 4 shows Health Career job growth since 2015 compared to the statewide average.

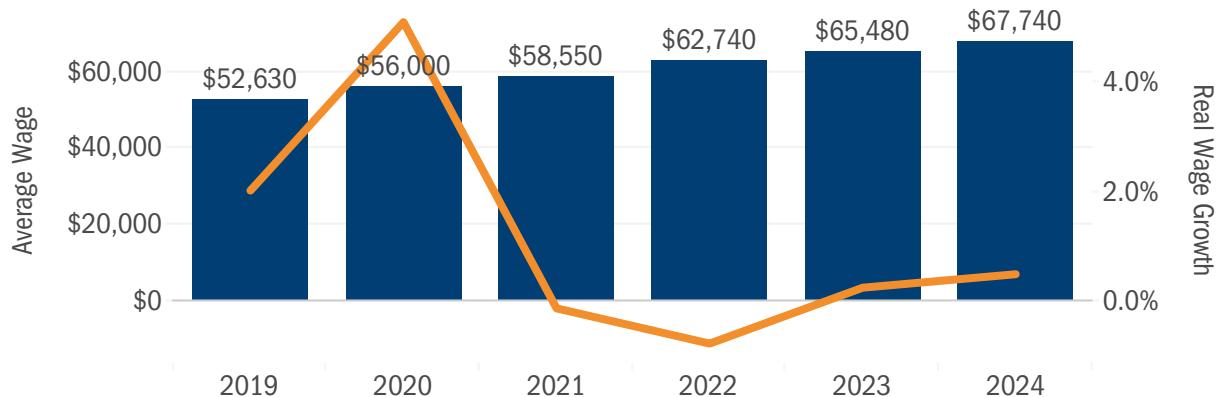
FIGURE 4: HEALTH CAREERS SECTOR JOB GROWTH IN MONTANA



Source: U.S. BLS LAUS and QCEW, Includes both private sector and government. Health Careers exclude childcare.

Wages in the Health Careers sector have grown faster than inflation over the last five years, suggesting an increase in standard of living for healthcare workers. Real wage growth averaged 1.0% per year since 2019, with the strongest growth in 2020. Real wage growth was negative or only slightly positive between 2021 and 2024. Montana's real wage growth in the Health Careers sector was slower than real wage growth across all Montana jobs, averaging 1.7% per year, but faster than national healthcare growth of 0.4%. Figure 5 shows the average annual wage for Montana's healthcare workers and the real wage growth since 2019.

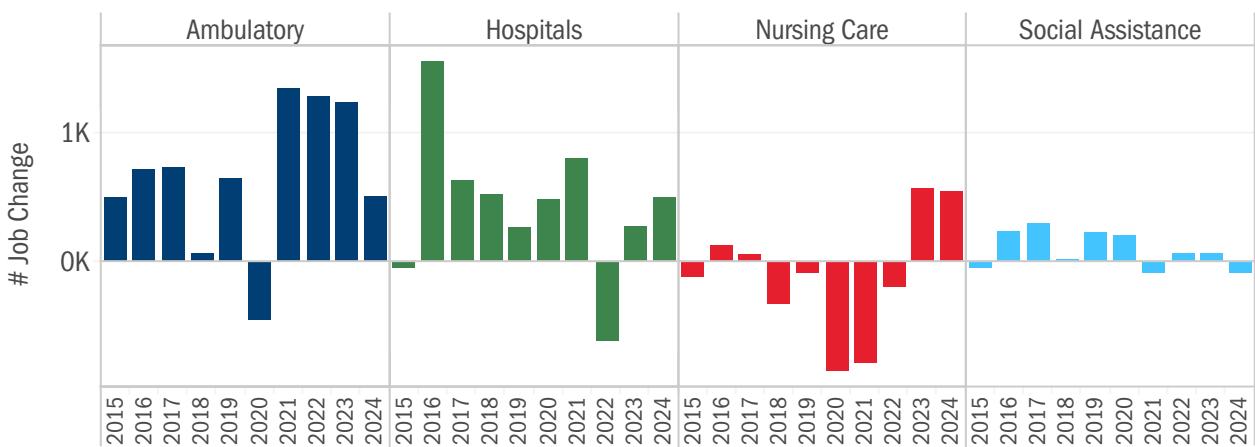
FIGURE 5: HEALTH CAREERS SECTOR AVERAGE ANNUAL WAGE AND REAL WAGE GROWTH



Source: U.S. BLS QCEW and CPI-U, Includes both private sector and government. Health Careers exclude childcare.

Health Career job growth varies by subindustry, as shown in Figure 6. Ambulatory care was the primary driver of job growth over the last five years, while job losses in nursing and residential care were the largest drag on growth. Ambulatory care was the only subindustry to outpace national job growth during this time.

FIGURE 6: ANNUAL JOB GROWTH BY HEALTH CAREER SUBINDUSTRY, MONTANA



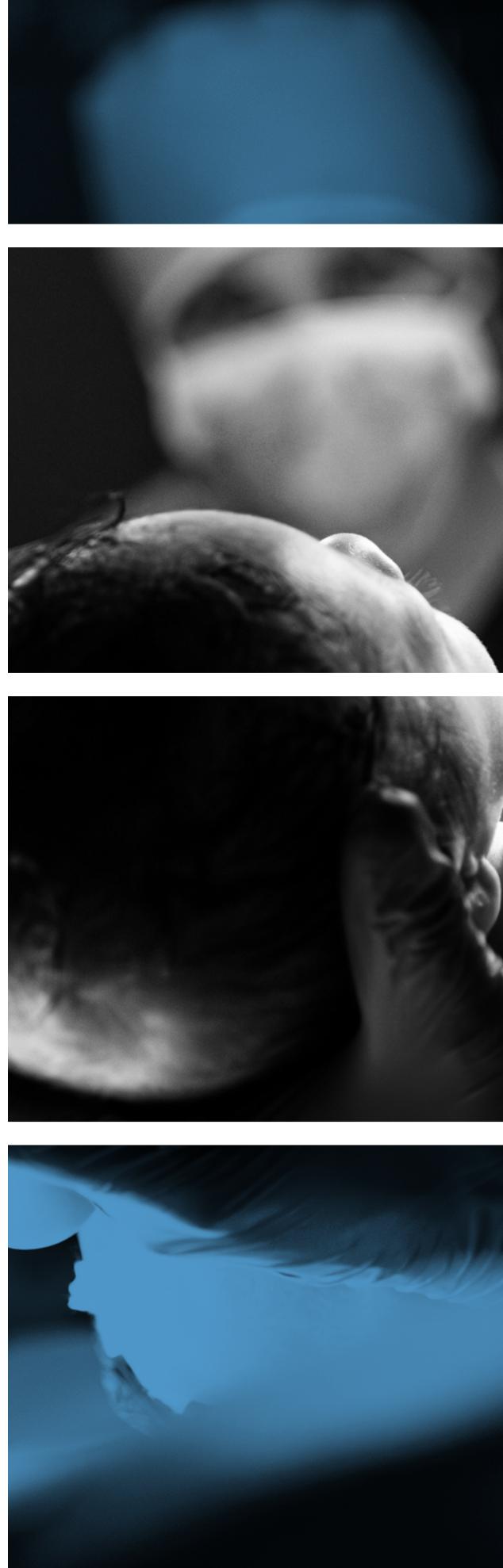
Source: BLS QCEW, Private sector only. Growth from 2015 through 2024. Social assistance excludes childcare.

Ambulatory care had the strongest job growth over the last several years, adding about 3,900 jobs since 2019, or 3.5% average annual growth. Most of this growth was from the years immediately following the pandemic, as strong migration increased the demand for outpatient services. The job losses in 2020 were related to business closures and delayed demand for nonessential healthcare services. Employment rebounded quickly, returning to pre-pandemic job levels by 2021. Ambulatory care jobs grew faster in Montana than the national average, with the U.S. growing at 2.7% average annual growth since 2019.

Hospital employment continued to grow in 2020 due to the essential nature of the services provided during the COVID-19 pandemic. However, increased financial strain among Montana hospitals led to job declines in 2022.² Financial conditions for many hospitals across the nation worsened in 2022 due to rising labor costs, declining federal pandemic support, an increase in higher acuity stays, and rising supply costs that outpaced federal reimbursement rates.³ Hospitals in the state returned to hiring in 2023 and 2024 as operating margins improved nationwide – largely due to stabilizing labor costs, decreased length of stay, and increases in revenue.⁴ Over the last five years, Montana hospitals have added a total of 1,400 jobs, averaging 1.1% annual job growth.

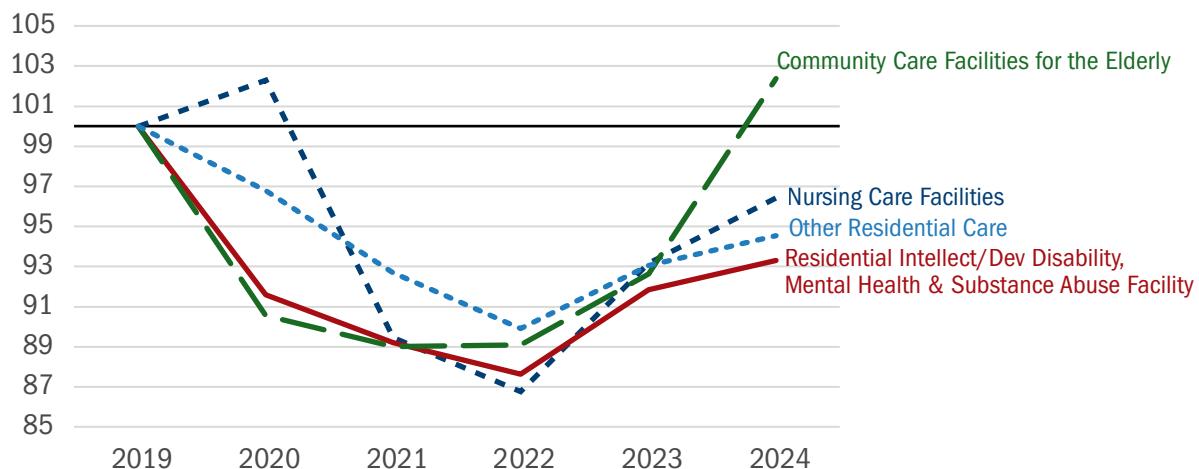
The social assistance industry has grown at a slower pace than hospitals and ambulatory care services over the last five years - adding 130 jobs since 2019 for an annual rate of 0.3%. These organizations provide public health and critical support services that impact individual and community health outcomes. Community food and housing organizations like the YWCA, and emergency and relief service organizations like the American Red Cross, have been the primary drivers of employment growth in social assistance over the last five years. Many social service assistants, social workers, counselors, phlebotomists, dietitians and nutritionists, and other social service and healthcare occupations work in these organizations.

Social assistance also includes individual and family services and vocational rehabilitation. Jobs for individual and family services, such as counseling, child/youth services, and services for the elderly or disabled, have generally grown over the long-term, despite a slowdown in recent years. Vocational rehabilitation has experienced general job loss over the last decade, with losses accelerating over the past five years.



Montana's nursing and residential care industry has experienced long-term declines in employment, with job losses accelerating in 2020 and 2021. Recent growth mitigated some of the pandemic-related job losses, but employment remains below 2019 levels. Nursing care facilities make up the largest share of jobs in this subindustry (40%). These facilities have experienced a general decline in employment over the last decade due to a shift towards home and community-based care settings (HCBS).⁵ Montana has seen nearly 30% decline in residents at certified nursing facilities over the last decade.⁶ Figure 7 shows nursing and residential care jobs indexed to their 2019 level, by subindustry.

FIGURE 7: JOBS IN THE NURSING AND RESIDENTIAL CARE SUBINDUSTRY, INDEXED TO 2019, MONTANA



Source: BLS QCEW, Private sector only. Other residential care revised to address non-economic employment change.

Community care facilities make up the second highest share of jobs within the nursing and residential industry (30%). Employment in community care facilities surpassed pre-pandemic levels in 2024, helping to offset some of losses in nursing care facilities. Montana licensed practical nurse staffing patterns also reflect a shift to assisted living facilities and away from nursing home/extended care.⁷

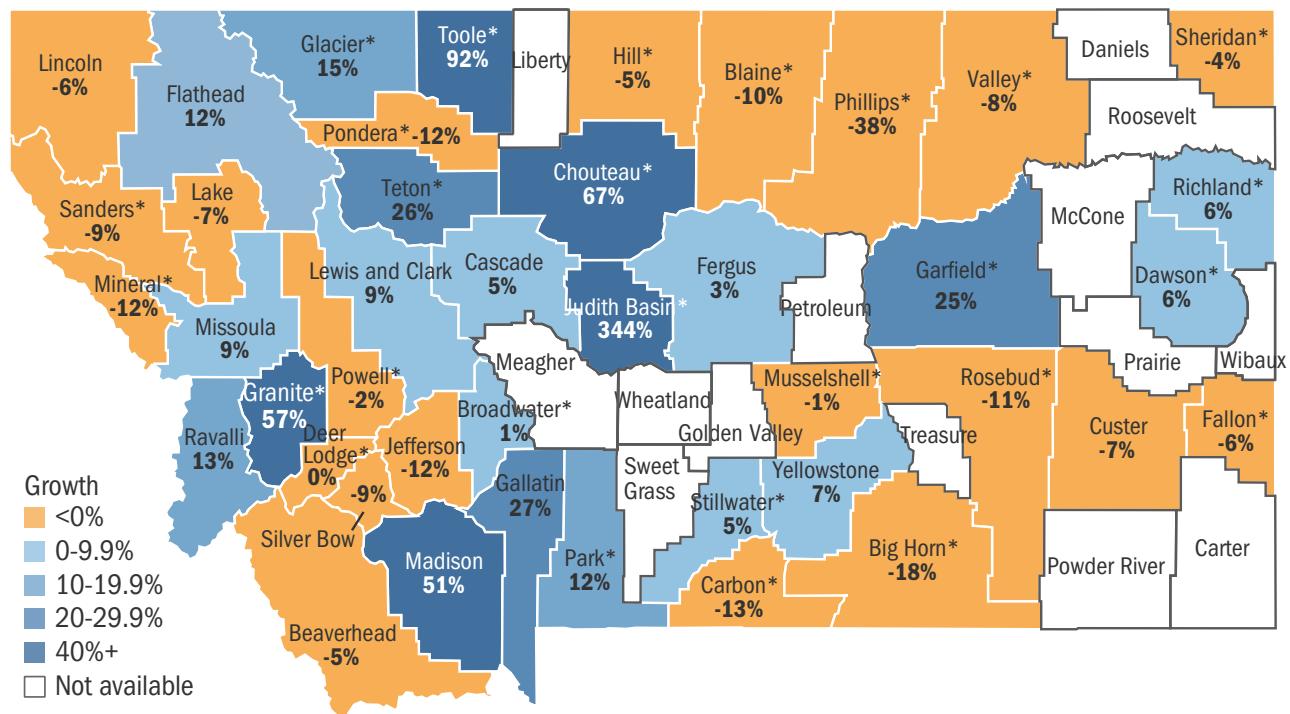
Over the next ten years Health Career employment is projected to grow by 1.2% per year, slightly below the sector's long-run average. Statewide employment is projected to grow by 1.1% annually. Most of the healthcare job growth is expected to occur in ambulatory care and hospitals. Growth is also expected in nursing and residential care and social assistance, but at a slower rate. Faster growth is projected in the near term driven by elevated migration rates. However, over the long run Health Career employment growth is projected to slow but remain positive.⁸



REGIONAL TRENDS IN HEALTHCARE

Health Career job growth over the last five years has been concentrated in and around urban areas. Rapid population growth in the state's urban areas drove much of this Health Careers sector growth. Figure 8 shows the average annual healthcare job growth rate by county since 2019. Gallatin, Ravalli, and Flathead counties had some of the strongest healthcare job growth and population growth.⁹ Some small and rural counties have experienced job losses in the healthcare industry over the last five years.

FIGURE 8: HEALTH CAREER JOB GROWTH BY COUNTY, 2019-2024



Source: BLS QCEW, Private sector only. Health Careers exclude childcare. *indicates healthcare job growth is based on the entire NAICS 62 healthcare industry, including childcare, due to data availability. Counties in white are nondisclosable.

Gallatin and Yellowstone counties have added the most healthcare jobs over the last five years among Montana counties, adding about 1,500 and 1,000 jobs, respectively. Flathead and Missoula counties each added about 800 jobs. Ambulatory care facilities were a leading contributor to healthcare job growth in these counties over the last five years. Ambulatory care accounted for just over half of the healthcare job growth in Gallatin and Yellowstone counties, and nearly all of the healthcare job growth in Flathead and Missoula counties.

Healthcare is projected to be a primary driver of employment growth throughout Montana, with the fastest growth projected in the regions with the fastest population growth. Over the next ten years healthcare employment is projected to be the fastest in the Northwest and Southwest regions of the state, which include Missoula, Flathead, Gallatin, and Lewis and Clark counties. The Southwest Region is expected to grow at an annual rate of 1.3%, while the Northwest's expected growth is 1.2%. Healthcare in the South Central region, including Billings, is expected to grow by 1% per year. The two rural regions of the state are projected to see slower growth, driven by more persistent outmigration.¹⁰

HEALTH CAREERS WORKER PROFILE

Predominately Female Workforce

78% of healthcare workers are women*

More College Education

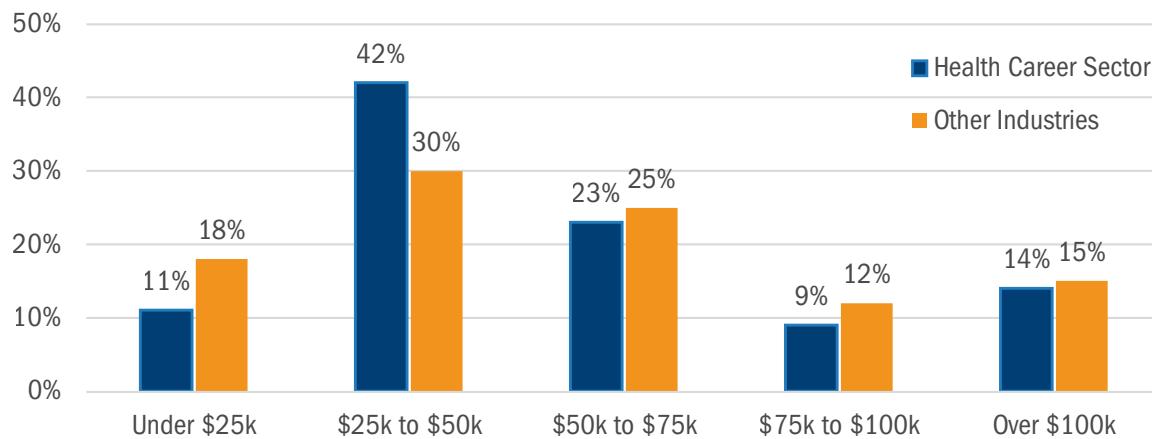
About 50% have earned a bachelor's degree or more*

Prime Age Workforce

69% between 25 and 54*

*Source: CPS 2021-2024

HEALTH CAREER ANNUAL EARNINGS FOR FULL-TIME WORKERS

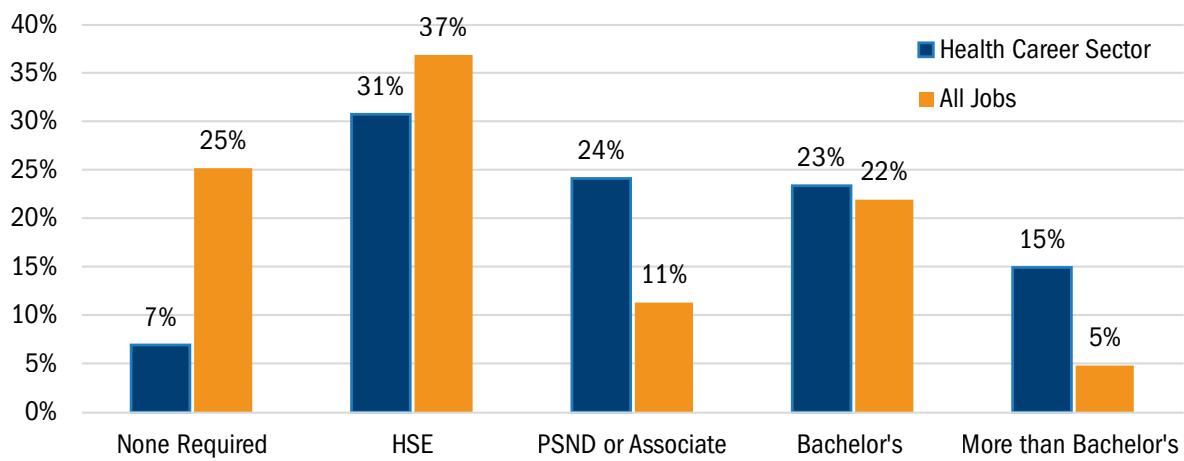


Source: CPS ASEC 2021-2024, IPUMS. Health Careers exclude childcare.

CERTIFICATIONS OR POSTSECONDARY EDUCATION

High share of Health Career occupations typically requires certifications or postsecondary education for job entry - 24% of jobs need a certification or associate degree, 23% need a bachelor's degree, and 15% need a graduate degree.

SHARE OF MONTANA JOBS BY TYPICAL EDUCATION NEEDED FOR JOB ENTRY



Source: OEWS with typical education needed for entry defined by the BLS. Health Careers exclude childcare.

LOOKING AHEAD: HEALTH CAREER WORKER DEMAND

Montana's Health Careers sector plays a key role in Montana's economy. Continued growth in healthcare will depend upon the availability of a highly trained workforce to fill job openings generated by worker turnover and industry growth. The Montana Department of Labor and Industry (MTDLI) estimates 8,500 annual job openings in the Health Careers sector over the next ten years in a variety of different roles, primarily to replace workers who leave the industry.

Figure 9 shows the top ten most common occupations in the Health Careers sector along with wages, training requirements, and projected annual job openings for each occupation. Total projected openings include those generated through growth and turnover. Turnover occurs as people change careers, retire, move, or otherwise leave the labor market.

FIGURE 9: TOP 10 LARGEST OCCUPATIONS IN HEALTH CAREERS SECTOR, 2024

Occupation	Employed	Avg Wage	Annual Total (incl Transfers) Openings 2024-2034	Annual Growth and Replacement Openings 2024-2034	Projected Growth 2024-2034	Training Requirements
Registered Nurses	9,020	\$86,890	590	380	12.9%	Bachelor's
Home Health and Personal Care Aides	7,190	\$33,330	1,460	840	16.1%	HSE
Nursing Assistants	4,140	\$42,200	600	270	8.3%	PSND
Medical Secretaries and Admin Assistants	3,740	\$42,380	490	240	10.6%	HSE
Medical Assistants	2,130	\$44,990	390	170	21.6%	PSND
Substance abuse, behavioral disorder, and mental health counselors	1,730	\$56,840	210	110	23.6%	Master's
Dental Assistants	1,460	\$45,850	240	100	14.1%	PSND
Medical and Health Services Managers	1,430	\$117,500	240	130	36.0%	Bachelor's + Work Experience
Social and Human Service Assistants	1,300	\$36,530	150	70	3.9%	HSE
Licensed Practical and Licensed Vocational Nurses	1,220	\$58,320	140	70	8.4%	PSND

Source: MTDLI Analysis of 2024 OEWS and Occupational Projections 2024-2034. Health Careers sector excludes childcare. HSE = High school diploma or equivalent. PSND = postsecondary nondegree award.

Nursing occupations are among the most common in the healthcare industry – including registered nursing and licensed practical nursing. The Health Careers sector also employs many assisting occupations, such as nursing, dental, medical, social, and administrative assistants. These common assistant occupations are among the lowest paid in the sector, earning between \$36,000 and \$46,000 annually. Home health aides are another common low-wage occupation in the sector, with many working in nursing homes and residential care facilities. Home health aides have the highest projected demand among healthcare occupations, with 1,460 annual openings projected over the next decade. Most of these openings are generated by turnover as workers move up the career ladder, change careers, or exit the labor force.

As the Health Careers sector adapts to meet Montana's changing needs, the demand for certain healthcare workers is expected to accelerate. Figure 10 shows the top ten fastest growing occupations in the sector. Many of the fastest growing jobs are high-paying and require an advanced degree, including nurse practitioners, physician assistants, speech-language pathologists, and pharmacists.

FIGURE 10: TOP 10 FASTEST GROWING HEALTHCARE OCCUPATIONS IN MONTANA, 2024

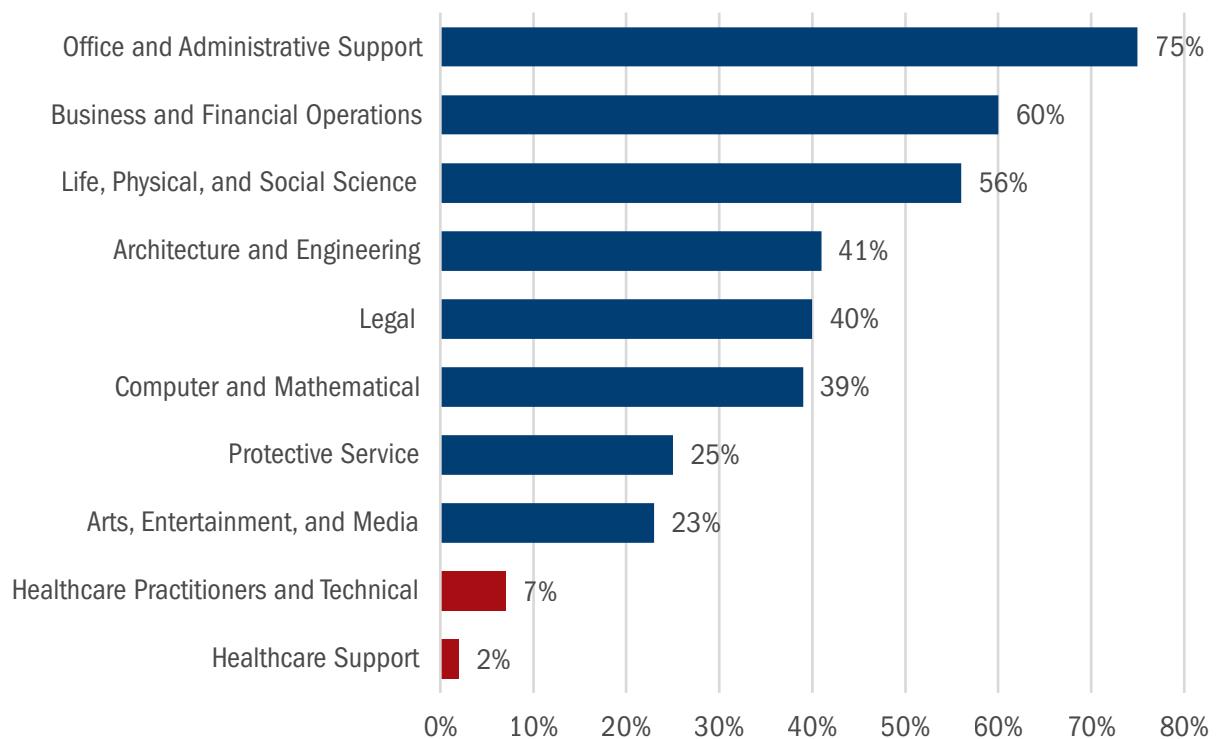
Occupation	Projected Growth 2024-2034	Annual Total (incl Transfers) Openings 2024-2034	Annual Growth and Replacement Openings 2024-2034	2024 Average Wage	Requirements
Nurse Practitioners	59.1%	90	70	\$131,610	Master's
Physician Assistants	37.8%	60	40	\$132,410	Master's
Medical and Health Services Managers	36.0%	240	130	\$117,500	Bachelor's + Work Experience
Speech-Language Pathologists	30.5%	20	10	\$89,990	Master's
Massage Therapists	29.9%	30	10	\$58,360	PSND
Physical Therapist Assistants	26.0%	70	30	\$63,290	Associate
HIT & Medical Registrars	24.1%	30	20	\$72,630	Associate
Pharmacists	23.8%	20	10	\$141,030	PhD
Substance abuse & mental health counselor	23.6%	210	110	\$56,840	Master's
Respiratory Therapists	21.9%	20	20	\$77,460	Associate

Source: MTDLI Analysis of 2024 OEWS and Occupational Projections 2024-2034. Health Careers sector excludes childcare. Health Careers Training and Licensure

MONTANA HEALTH CAREERS AND ARTIFICIAL INTELLIGENCE

Artificial intelligence (AI) is influencing the way Montanans work, with the technology used to automate and/or support day-to-day tasks. Some occupations are highly exposed to this new technology, meaning that a high share of the occupation's day-to-day work involves tasks that AI can perform. Healthcare occupations are minimally exposed to AI, due to the hands-on nature of these roles. The MTDLI finds approximately 21% of the state's workforce are employed in occupations highly exposed to AI. Only 7% of healthcare practitioner and technical occupations and 2% of healthcare support occupations are highly exposed to AI, as shown in Figure 11.

FIGURE 11: SHARE OF OCCUPATIONAL GROUP HIGHLY EXPOSED TO AI



Source: MTDLI analysis of Occupational Exposure to AI by Geography and Education. Schendestok & Wertz. April 2024.

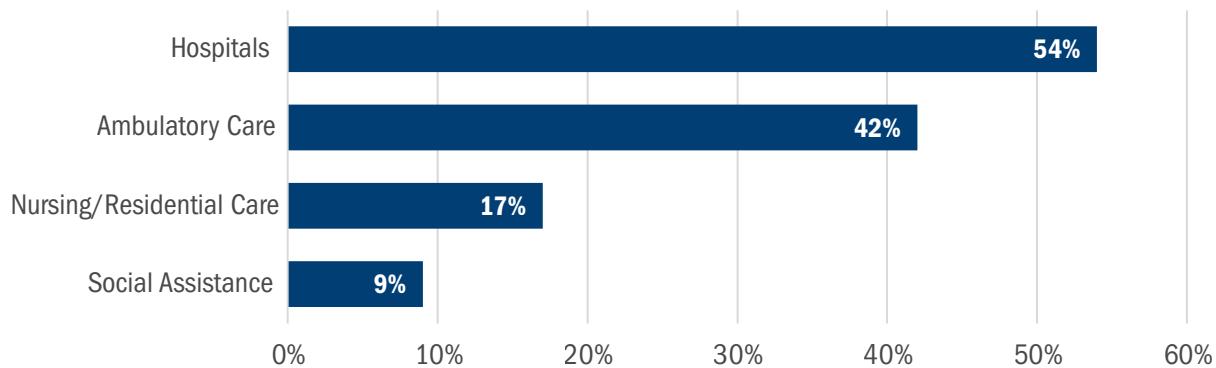
The MTDLI has identified areas of AI opportunity in healthcare under the 406 JOBS initiative. AI integration into healthcare service delivery has the potential to increase workforce productivity, eliminate administrative burden, reduce errors, and enhance care delivery. For example, physicians, advanced practice providers, and nurses may be able to utilize AI platforms to help reduce time spent on documentation and prior authorizations, thus freeing up more time for direct-patient care. Continuous remote monitoring systems may also reduce hospital readmissions and enable care for chronic conditions in home and community settings.

HEALTH CAREERS TRAINING AND LICENSURE

The Health Careers sector has more projected job openings requiring a certification or degree (50%) than the state average (26%), indicating greater education and training requirements. There are a variety of pathways to prepare healthcare workers, including through the state's K-12 education system, postsecondary education, registered apprenticeship programs, and certificate and technical education programs.

The training pathways for many healthcare occupations culminate in a professional license. An estimated 53% of Montana's healthcare workforce hold a professional certification or license in addition to other educational trainings they may have completed.¹¹ Most of these are licenses governed by a Montana licensing board. About 38% of healthcare workers hold a professional license that's governed by a Montana licensing board. Figure 12 shows the proportion of license holders within each subindustry. About 54% of hospital jobs are held by licensed professionals. Forty-two percent of ambulatory care jobs are held by licensed professionals. Nursing and residential care and social assistance rely less on licensed care.

FIGURE 12: SHARE OF LICENSED WORKERS BY HEALTH CAREER SUBINDUSTRY, MONTANA 2024

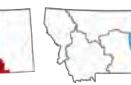


Source: MTDLI Analysis of QCEW and UI wage data, 2024 quarter 3. Number of workers are from UI-covered firms—does not include sole proprietors. Includes all license holders who worked in Montana in the quarter, even if the residence on their license is out of state. Social assistance excludes childcare.

The postsecondary system, including registered apprenticeship and certificate and technical education programs, provides a critical pathway into licensed and unlicensed occupations in the Health Careers sector. Figure 13 estimates how well postsecondary training pathways meet statewide and regional demand for select high-demand healthcare occupations. The figure groups occupations by typical education for job entry. However, some of these roles do not require a college education or apprenticeship. Occupational demand that is unmet by postsecondary and apprenticeship pathways would need to be met by other sources, like certificate programs or businesses training workers on the job outside of the apprenticeship model.



FIGURE 13: SUPPLY AND DEMAND ANALYSIS OF HEALTHCARE/SOCIAL WORKERS FROM POSTSECONDARY SYSTEM

	Occupation	Apprenticeship Status	Statewide	Northwest	Southwest	North Central	South Central	Eastern
								
Postsecondary Non-Degree	Dental assistants	Apprenticeable occupation	Under	Meets	Under	Meets	Under	Under
	LPNs/LVNs*	Available in MT	Under	Under	Under	Under	Under	Under
	Medical assistants	Available in MT	Under	Under	Under	Over	Under	Under
	Health tech & technicians		Meets	Meets	Over	Meets	Over	Over
	Nursing assistants	Available in MT	Under	Under	Meets	Meets	Under	Under
	Phlebotomists	Available in MT	Under	Under	Under	Meets	Under	Over
Associate	Dental hygienists*		Under	Under	Under	Over	Under	Under
	Radiologic technologists & technicians*	Available in MT	Meets	Over	Over	Under	Over	Meets
	Respiratory therapists*		Under	Over	Meets	Over	Under	Under
Bachelor's	Child, family, & school social workers		Under	Under	Under	Under	Under	Under
	Clinical lab tech & technicians**	Apprenticeable occupation	Under	Under	Over	Under	Under	Under
	Registered nurses*	Available in MT	Meets	Under	Over	Over	Under	Under
	Social workers, all other	Apprenticeable occupation	Over	Over	Over	Meets	Meets	Under
	Substance Abuse & Mental Health Counselors*	Apprenticeable occupation	Under	Under	Under	Under	Under	Under
	Healthcare social workers		Under	Under	Under	Under	Under	Under
Master's	Mental health & substance abuse social workers		Under	Under	Under	Over	Under	Under
	Nurse practitioners*		Meets	Under	Meets	Meets	Under	Under
	Occupational therapists*		Meets	Over	Meets	Meets	Meets	Under
	Physician assistants*		Under	Meets	Meets	Under	Under	Under
	Rehabilitation counselors		Meets	Meets	Meets	Over	Under	Meets
	Speech-language pathologists*		Meets	Over	Under	Under	Under	Under
PhD/ Prof	Pharmacists*		Over	Over	Over	Under	Under	Under
	Physical therapists*		Meets	Over	Meets	Under	Meets	Under

Source: Montana Post-Secondary Workforce Report, 2022, MTDLI. MTDLI 2020-2030 Occupational Employment projections. Graduate data from IPEDS and RAPIDS. Demand is sum of occupation demand historically filled by graduates from the program according to 2015-2019 ACS IPUMS micro data. Only graduates from institutions located in the region are included in supply. *Requires licensure. **Technologists require licensure.

Over half of the high-demand healthcare and social service occupations are undersupplied. This includes unlicensed roles, such as dental assistants, medical assistants, nursing assistants, phlebotomists, and social workers. Undersupplied licensed occupations include practical nurses (LPNs), dental hygienists, respiratory therapists, counselors, clinical lab technologists/technicians, and physician assistants. Industry feedback also suggests radiology staff, registered nurses, and physical therapists are difficult to hire, despite meeting demand in Figure 13.¹²

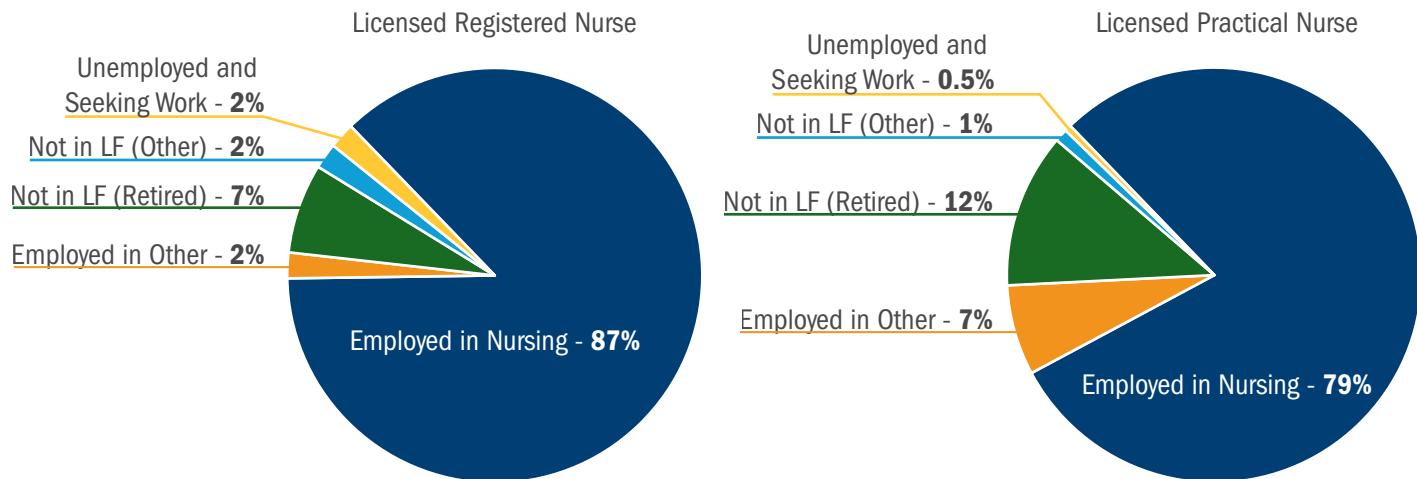
Dental hygienists and LPNs are two of the most severely undersupplied occupations. There are not enough new LPN and dental hygienist licenses to meet projected occupational demand.¹³ Several other occupations in Figure 13 are undersupplied but do have enough licensed professionals in the state to fill occupational demand if each licensed professional worked in the corresponding occupation. However, this is not always the case. For example, registered nurses may work as staff nurses, case managers, nurse managers, nurse faculty/educators, consultants, nurse researchers, or a non-nursing profession. The supply and demand analysis presented in Figure 13 takes these typical staffing patterns into consideration.

Registered nurses are undersupplied in certain regions of the state. Despite meeting statewide occupational demand, other indicators suggest recruitment and retention challenges remain a concern within this profession. Only 2% of these licensed RNs report being unemployed and seeking work, and 23% of employed RNs plan to leave the workforce over the next five years.¹⁴ Industry feedback also suggests recruitment and retention challenges for Montana employers.¹⁵ Registered nurses are essential to the industry, making up 13% of all healthcare jobs, and 25% within hospital settings alone.¹⁶

MONTANA'S LICENSED NURSES

Montana has a shortage of nurses, despite the large supply of nurses licensed in the state. There are about 23,000 registered nurses (RNs) and 2,200 practical nurses (LPNs) licensed in the state. However, only about 21,000 RNs are considered part of Montana's immediate labor supply.¹⁷ Most of these licensed RNs (87%) and LPNs (79%) are employed in nursing, with some employed out-of-state either through multistate licensing agreements or dual licensure.¹⁸ Only about 2% of RNs and 0.5% of LPNs say they are unemployed and seeking work. This low rate of unemployment suggests recruitment challenges for healthcare establishments. Figure 14 shows the share of RNs and LPNs by employment status.

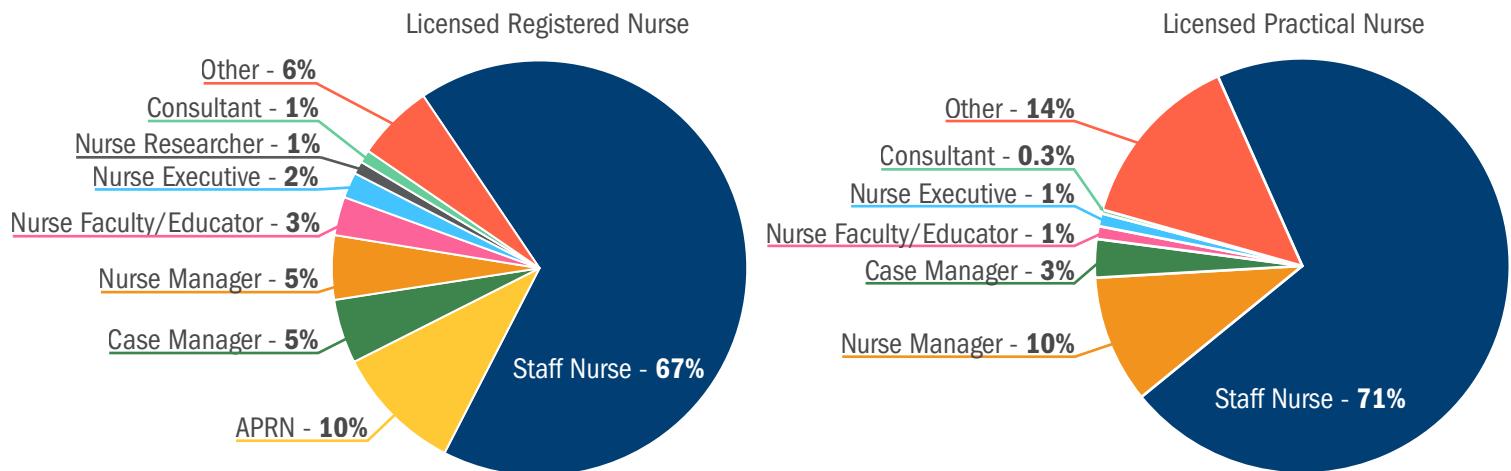
FIGURE 14: EMPLOYMENT STATUS OF RNs AND LPNs IN MONTANA



Source: 2025 Montana Nursing Workforce Report, using data from the NCSBN 2024 Survey.

Of the nurses licensed in Montana, an estimated 13,000 to 16,000 RNs and 1,500 to 1,600 LPNs are employed in a nursing profession in state.¹⁹ These RNs and LPNs primarily work as staff nurses in healthcare facilities. However, licensed nurses and their expertise are needed to fill other roles too, including advanced practice registered nurses, nurse managers, case managers, consultants, and nurse faculty. RNs employed as APRNs hold an advanced license in addition to maintaining their RN licensure. Figure 15 shows the share of licensed nurses by job title.

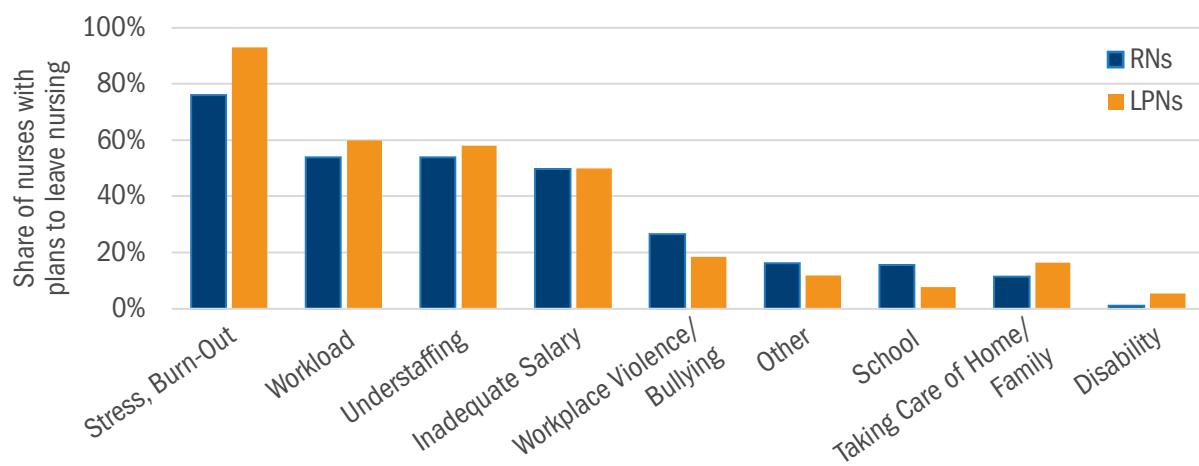
FIGURE 15: PRIMARY JOB TITLE FOR MONTANA'S LICENSED NURSES



Source: 2025 Montana Nursing Workforce Report, using data from the NCSBN 2024 Survey.

With few unemployed nurses, healthcare establishments may wish to reduce turnover and increase retention. About 13% of Montana RNs employed in nursing reported plans to retire in the next 5 years and another 10% plan to leave the occupation for other reasons. Twenty-five percent of Montana LPNs report plans to retire in the next 5 years, with another 12% planning to leave the occupation for other reasons. For nurses planning to leave for non-retirement reasons, most report stress and burn-out, workloads, understaffing, and inadequate salaries as the primary reasons to leave the position as shown in Figure 16. Reducing turnover will require attention to these reported issues.

FIGURE 16: REASONS FOR PLANNING ON LEAVING THE NURSING WORKFORCE



Source: 2025 Montana Nursing Workforce Report, using data from the NCSBN 2024 Survey.

For more information on RNs and LPNs licensed in the Montana, see the 2025 Montana Nursing Workforce Report, available at lmi.mt.gov/Publications/index.

CAPACITY BUILDING IN HEALTH CAREER PATHWAYS

The state's current workforce training system undersupplies several high-demand occupations within the Health Careers sector. The 406 JOBS initiative seeks to expand pathways to high-demand, high-growth Health Careers occupations to close some of these critical regional and statewide workforce gaps.

Montana's registered apprenticeship program is one essential pathway to train many of these high-demand Health Career occupations. Healthcare providers are currently using this model to train medical assistants, registered nurses, LPNs, nursing assistants, surgical technologists, pharmacy technicians, and psychiatric technicians. MTDI's registered apprenticeship program continues to grow, with new programs and occupations in development alongside industry partners. Programs coming soon include radiation technologists, clinical lab scientists, medical lab technicians, and physical therapy assistants.

The 406 JOBS initiative also seeks to develop authentic career ladders from high school through Health Careers. Opportunities for high school students across Montana to learn about and prepare for careers in healthcare continue to grow. The Montana Office of Public Instruction has a defined Health Professional career pathway to support schools in developing career awareness and preparation programs. Some schools use Project Lead The Way Biomedical Sciences curriculum for health career preparation, while others design programs with industry partners.

Montana's newly established statewide credential database, authorized under House Bill 252 in the 2025 Legislature, includes industry recognized credentials in 15 healthcare occupations that students may take while still in high school. Some Montana communities are developing charter school programs with a specific career preparation focus. Corvallis School District, for example, is developing a Transformational Learning Charter with five career pathways, including medical professions. Montana also has more than 20 HOSA-Future Health Professional chapters across the state to support leadership, skill, and career development in health fields for high school and college students.

CONCLUSION

Montana's Health Careers sector is essential to the state economy, employing a significant portion of the workforce in high-paying jobs. Healthcare providers provide vital care for Montanans, which help ensure a healthy workforce. Continuing growth in the Health Careers sector will require training workers to keep up with the sector's vast technical skills and licensing obligations. The Montana Department of Labor and Industry remains committed to investing in workforce development and training opportunities for the state's growing Health Careers sector.



ENDNOTES

1.....Social assistance is defined in this report as individual and family services (NAICS 6241), community food and housing, and emergency and other relief services (NAICS 6242), and vocational rehabilitation services (NAICS 6243). Child day care services (NAICS 6244) is excluded from this report.

2.....Houghton, K. September 2022. "Montana hospitals cut jobs, services as rising costs strain budgets." Daily Montanan. <https://dailymontanan.com/2022/09/06/montana-hospitals-cut-jobs-services-as-rising-costs-strain-budgets/>

3.....Medicare Payment Advisory Commission. March 2024. Report to the Congress: Medicare payment policy. Washington, DC: MedPAC

4.....Levinson, Z; Godwin, J; Neuman, T. December 2024. "Hospital Margins Rebounded in 2023, But Rural Hospitals and Those With High Medicaid Shares Were Struggling More Than Others." KFF. <https://www.kff.org/health-costs/hospital-margins-rebounded-in-2023-but-rural-hospitals-and-those-with-high-medicaid-shares-were-struggling-more-than-others/>

5.....Chidambaram, P; Burns, A. December 2024. "A Look at Nursing Facility Characteristics Between 2015 and 2024." KFF. <https://www.kff.org/medicaid/a-look-at-nursing-facility-characteristics/>

6.....Total Number of Residents in Certified Nursing Facilities. KFF. <https://www.kff.org/state-category/providers-service-use/nursing-facilities/>. Accessed 26 Nov. 2025.

7.....MTDLI. The Status of the Nursing Workforce in Montana. 2025. An estimated 17% of Montana LPNs worked in nursing home/extended care in 2024, down from 26% in 2020. An estimated 9% of Montana LPNs worked in assisted living facilities in 2024, up from 7% in 2020.

8.....MTDLI Employment Projections by Industry 2024-2034.

9.....U.S. Census Bureau, Annual Resident Population Estimates, Estimated Components of Resident Population Change: April 1, 2020 to July 1, 2024.

10.....MTDLI Employment Projections by Industry 2024-2034.

11.....BLS CPS 2021 – 2024, IPUMS.

12.....MTDLI. 2025 Healthcare Survey. Preliminary results.

13.....MTDLI Occupational Projections, annual projected job openings. MTDLI licensure data, average number of new licenses over last two years.

14.....MTDLI. The Status of the Nursing Workforce in Montana. 2025.

15.....MTDLI. 2025. Healthcare Survey. Preliminary results.

16.....OEWS.

17.....Estimate of immediate labor supply excludes internationally educated nurses living outside the U.S.

18.....Most Montana nurses hold a multistate license as part of the Nurse Licensure Compact agreement (NLC). This allows Montana nurses who are both licensed in Montana and claim Montana as their primary residence to practice in NLC participating states, without obtaining other licenses. Nurses holding this multistate license in other states may practice in Montana without obtaining a Montana license

19.....Minimum estimate derived using MTDLI QCEW and UI wage data. Maximum estimate derived from the NCSBN 2024 survey.

