



TENNESSEE'S PHYSICIAN WORKFORCE SNAPSHOT

The Projected Workforce Gap

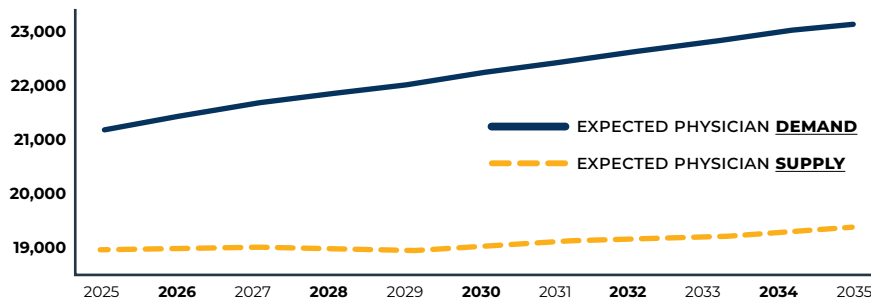


3,860 PHYSICIAN SHORTAGE

PROJECTED BY 2035 WITH NO INTERVENTION

+10% ↑↑↑
IN DEMAND FOR PHYSICIANS
by 2035, compared to 2025

+3% ↑↑↑
IN SUPPLY OF PHYSICIANS
by 2035, compared to 2025



KEY TAKEAWAYS

- Tennessee faces a projected shortage of 3,860 physicians by 2035 and already has fewer physicians per capita (264 vs. 302 per 100K nationally)
- Residency capacity is the primary bottleneck: Tennessee has fewer residents entering training (8.83 vs. 11.17 per 100K nationally), contributing to a projected 863-position shortage by 2035
- Tennessee retains fewer physicians than the U.S. overall (34% vs. 38% of medical school graduates; 42% vs. 48% of residency graduates)
- Geographic and specialty gaps are more pronounced, with rural areas and fields like psychiatry and family medicine facing the greatest shortages
- Aging workforce risk: In 14 specialties, over 25% of physicians are age 65+
- Physician backgrounds: 26.9% of physicians are non-white (vs. 38.2% nationally); 16.8% attended international medical schools (vs. 24.7% nationally)

GAP IN NEED BY PHYSICIAN TYPE



2,318

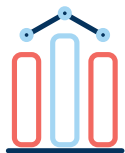
PRIMARY CARE PHYSICIANS
needed in 2035



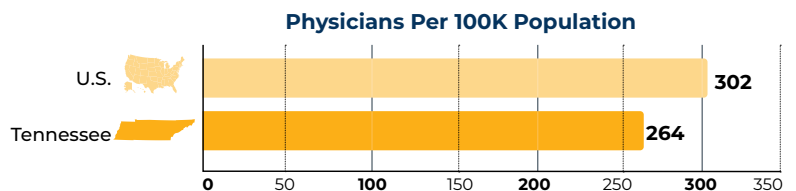
1,542

SPECIALTY PHYSICIANS
needed in 2035

Current Capacity Benchmarks



Tennessee currently has 264 physicians per 100,000 residents, compared to the national average of 302.



-33% ↓↓↓
FEWER PSYCHIATRISTS
than the national benchmark
(10 vs 15 per 100K)



-20% ↓↓↓
FEWER EMERGENCY MEDICINE PHYSICIANS
(12 vs 15 per 100K)

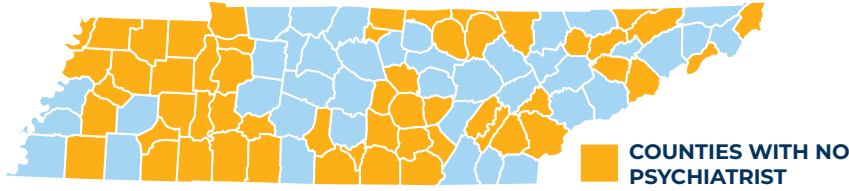


-14% ↓↓↓
FEWER PRIMARY CARE PHYSICIANS including family medicine and pediatrics
(32 vs 37 per 100K for Family Medicine, 18 v. 21 per 100K for Pediatrics)

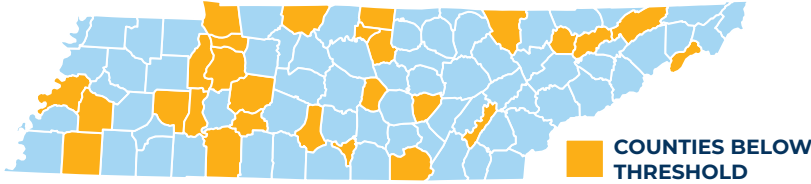


Geographic Disparities

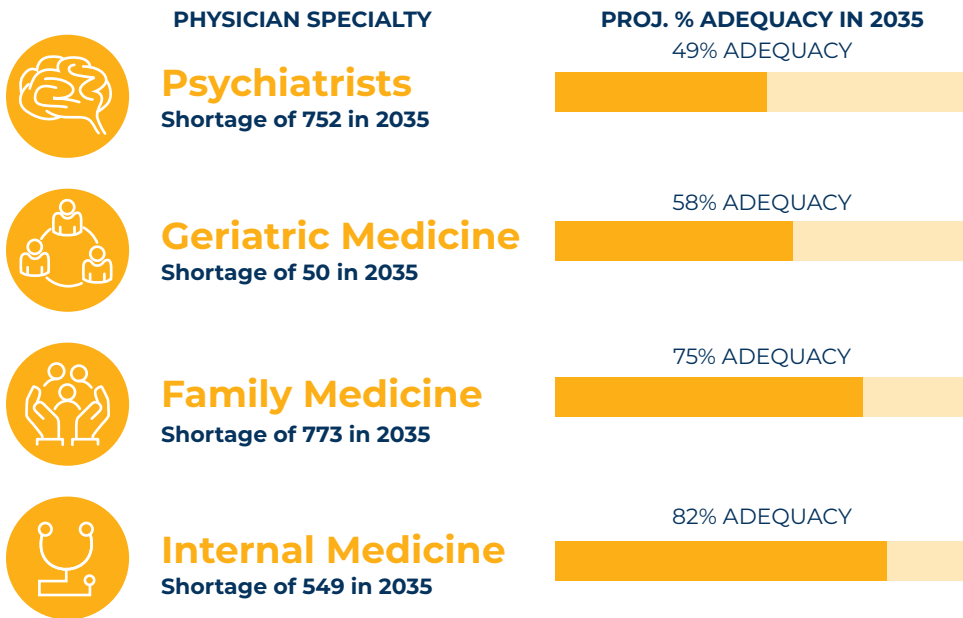
MORE THAN HALF OF TENNESSEE COUNTIES HAVE NO PSYCHIATRIST



27 TENNESSEE COUNTIES HAVE LESS THAN THE RECOMMENDED NUMBER OF PRIMARY CARE PHYSICIANS (3,500 PER 100K RESIDENTS)

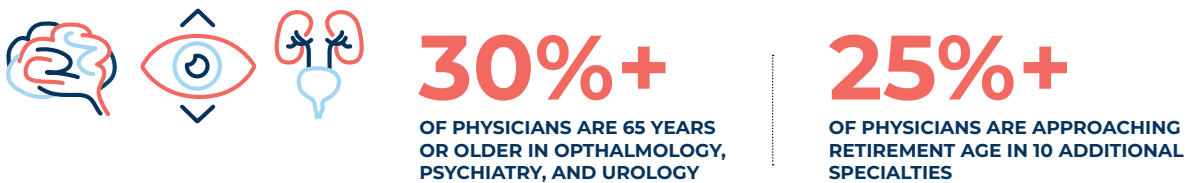


Physician Supply and Adequacy



Aging Workforce Threat

A retirement wave is looming, with over 25% of Tennessee physicians in 19 different specialties approaching retirement age.



For detailed data, interactive maps, and complete analysis, see the full report and Tennessee Medical Provider Landscape dashboard at [veritashealthsolutions.org/tn_physicians_landscape/](https://www.veritashealthsolutions.org/tn_physicians_landscape/). This report was funded by a grant with the State of Tennessee. For more information on ways TCWD and THA are engaged in workforce development please visit our website [tncwd.com](https://www.tncwd.com) or email tcwd@tha.com.

CONSTRAINED TRAINING PIPELINE

- Tennessee currently has 784 medical school graduates but only 764 residency positions
- Without GME expansion, the gap grows to 863 fewer residency positions than graduates by 2035, meaning more than half of 2035's graduates may leave the

RETENTION AND IN-STATE TRAINING

- Tennessee retains 34% of medical school graduates and 42% of residency graduates
- Retention increases to 66% when physicians complete both medical school and residency in-state

UNEVEN SHORTAGES

- Rural areas face more severe and persistent physician shortages
- High-need specialties (such as psychiatry and family medicine) are particularly constrained

WORKFORCE RISKS

- Aging workforce: 14 specialties have more than 25% of physicians age 65+, indicating near-term retirement risk
- Limited alternative supply pathways: Tennessee relies less on internationally trained physicians than other states

