



Virginia Healthcare Workforce Briefs

Indicators from the Bureau of Labor Statistics'
Current Employment Statistics Survey
Series 1: State & National Employment

Series 1, Issue 6

June 2012

Highlights

- ◆ According to preliminary estimates, health care & social assistance (HC&SA) employment in Virginia declined by 200 jobs in May, a decrease of 0.05% from the previous month.
- ◆ April preliminary estimates for Virginia HC&SA Employment were revised upward by 1,100 jobs to 391,700, decreasing April's preliminary loss estimates to only 100.
- ◆ YTD, Virginia's HC&SA sector added 4,900 jobs through May, an annualized rate of 3.07%, down from a revised 5,100 jobs and 5.38% annualized growth over the first 4 months.
- ◆ Virginia's HC&SA sector was a drag on Virginia employment for the second month in a row. It accounted for 24.4% of Virginia's YTD job growth through May, down from 51.5% in the first quarter.
- ◆ YTD, Virginia accounted for 2.9% of job growth in the national HC&SA sector, down from 4.6% through the 1st quarter.

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Data in the report is seasonally adjusted, and includes employees of private firms only. Self-employed persons, including health professionals in private practice, are not included.

Data in Brief

Seasonally Adjusted*	Employment, in Thousands				Growth Rate, Annualized		
	May 2011	Feb 2012	Apr 2012	May 2012	12 month	3 month	1 month
Nonfarm, Total							
Virginia	3,678.1	3,713.3	3,718.2	3,722.8 ^P	1.2%	1.0%	1.5%
National	131,227.0	132,720.0	132,940.0 ^P	133,009.0 ^P	1.4%	0.9%	0.6%
Health & Social Assistance							
Virginia	381.3	390.2	391.7	391.5 ^P	2.7%	1.3%	-0.6%
National	16,596.7	16,880.0	16,934.3 ^P	16,968.3 ^P	2.2%	2.1%	2.4%
All Other Nonfarm							
Virginia	3,296.8	3,323.1	3,326.5	3,331.3 ^P	1.0%	1.0%	1.7%
National	114,630.3	115,840.0	116,005.7 ^P	116,040.7 ^P	1.2%	0.7%	0.4%

^P: Preliminary Results

*Seasonally adjusted data is adjusted by the Bureau of Labor Statistics to account for weather, holidays and other seasonal changes. Economists use seasonally adjusted data to reveal underlying trends over time. This series uses seasonally adjusted data exclusively. When comparing data in this series to other HWDC series, or publications from other sources, it is important to note whether the data reported has been seasonally adjusted.

Jobs Created

According to preliminary data released June 15, 2012 by the US Department of Labor, Bureau of Labor Statistics, Virginia's HC&SA sector lost 200 payroll jobs in May, the second consecutive monthly loss. April figures were revised upward, erasing 1,100 of the estimated 1,200 job losses. Revisions generally occur due to delayed responses from smaller establishments

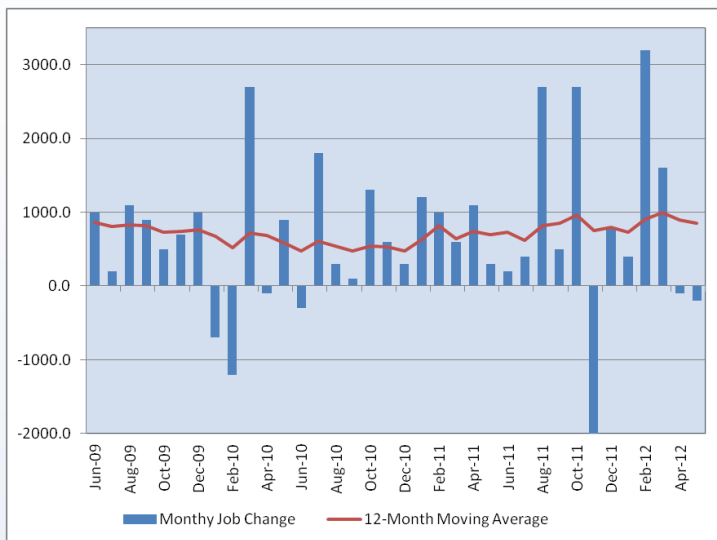


Figure 1: Monthly Change in Employment in Virginia's Health Care & Social Assistance Sector, Seasonally Adjusted.

and not seasonally adjusted data (see Series 2) suggest much of the change occurred in ambulatory services. YTD growth declined to 4,900 jobs added from a peak of 5,200 added through March. The sector accounted for 24.38% of all of Virginia's job growth through May.

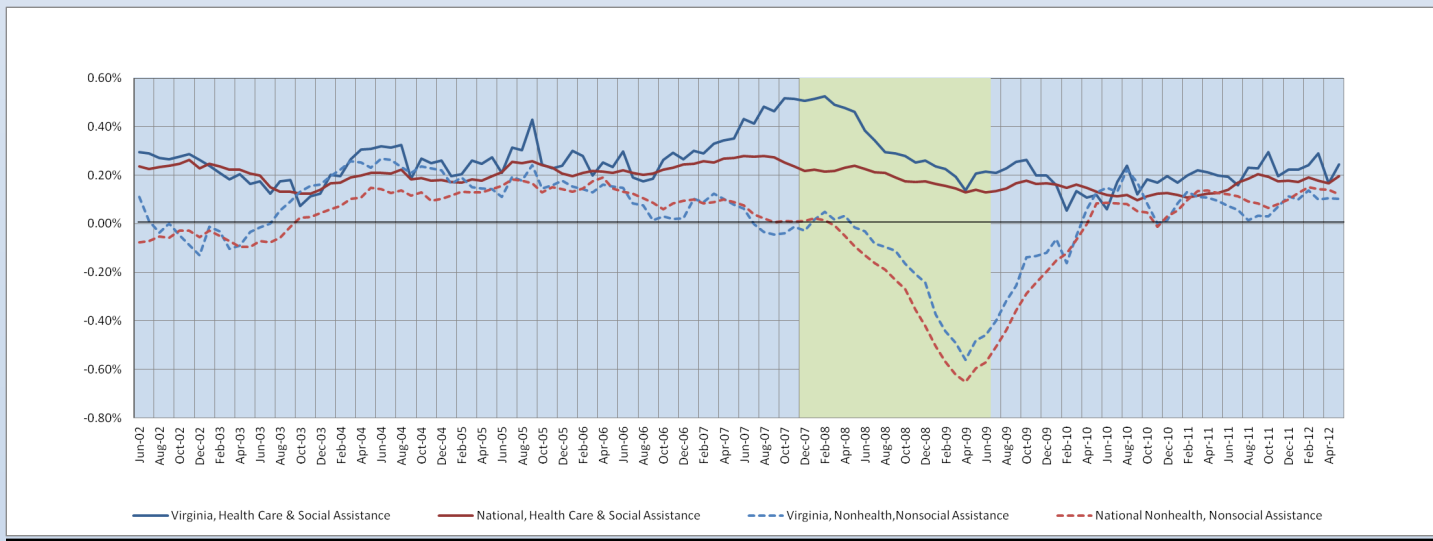
May was the 2nd consecutive month of job losses for Virginia's HC&SA sector. However, after revisions for April, Virginia's HC&SA losses have been slight, totaling 300 jobs. Meanwhile, national HC&SA job growth has been robust.

Virginia's HC&SA sector added an average of 850 jobs each month over the last 12 months, compared to 691 jobs in the prior 12 month period, but the 12-month moving average declined for a second month.

Employment Growth Rate

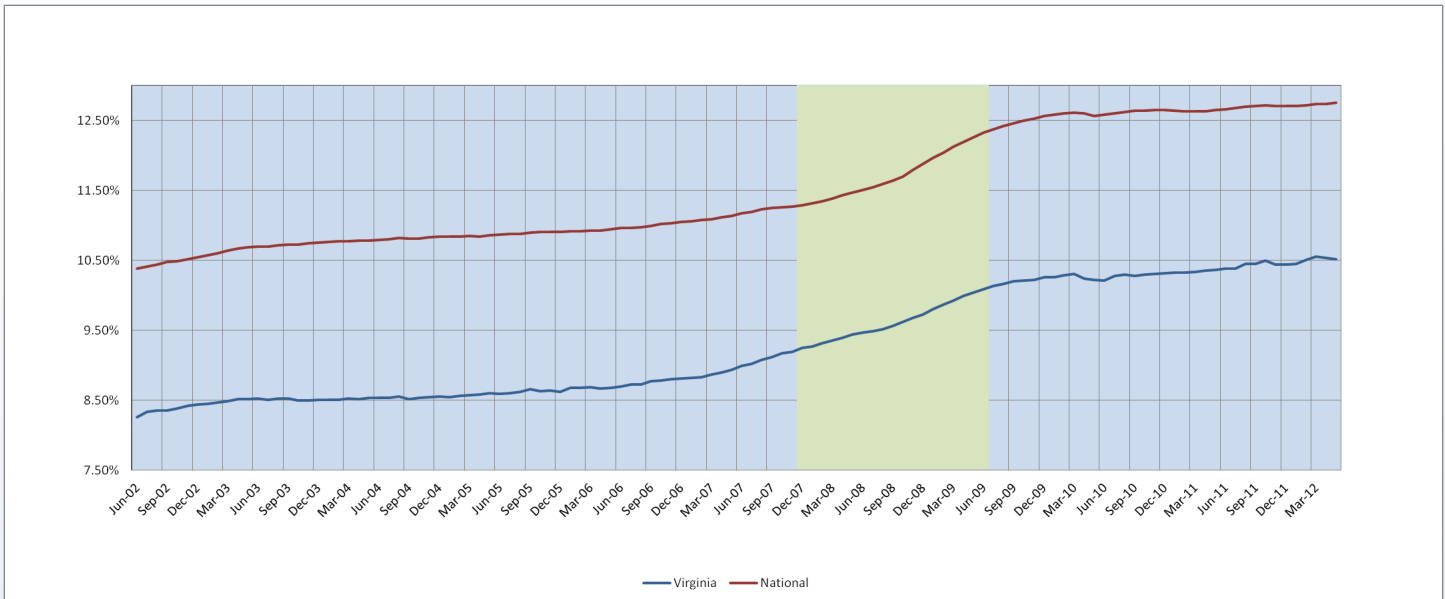
Virginia's HC&SA sector experienced especially strong growth just prior to the 2007-2009 recession. This is true when compared to growth in other time periods, growth in the national HC&SA sector and growth in non-HC&SA payrolls in Virginia. This strong growth continued into the beginning of the recession before stabilizing close to the national rate of growth in the sector in the second half of 2009. Despite this, Virginia's HC&SA payrolls have tended to grow more quickly than national growth in the sector and more quickly than Virginia's non-HC&SA payroll growth. In April, payrolls in Virginia's HC&SA sector dropped by 0.05% according to preliminary data, compared to 0.20% growth in the sector nationally and compared to a 0.14% gain in Virginia's non-HC&SA payrolls. YTD, Virginia's HC&SA sector has grown 1.3%, compared to 1.0% for the sector nationally and 0.46% for Virginia's non-HC&SA payrolls.

Figure 2: 6-month Moving Average, Employment Growth (Seasonally Adjusted).



Share of Employment

Figure 3: The Health Care and Social Assistance Sector's Share of Nonfarm Employment, Seasonally Adjusted.



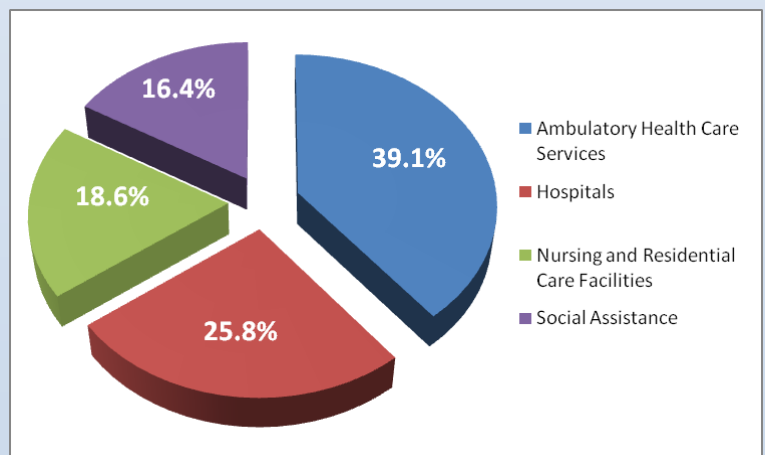
In May, Virginia's HC&SA sector continued a pause in its growing importance as an employer in the Commonwealth. According to preliminary estimates for May, the HC&SA sector accounted for 10.52% of all payroll jobs in Virginia, a decrease of 0.17% from revised April figures. Year-to-date, the HC&SA sector has captured an additional 0.06% share of Virginia's payroll jobs. Virginia's HC&SA sector is still small compared to the sector nationally. The HC&SA sector accounted for 12.76% of national payroll jobs in May. Virginia has captured 2.92% of national growth in the HC&SA sector year-to-date, down from a 2012 peak of 4.60% through the first quarter. The HC&SA sector has been capturing a growing share of payroll employment in Virginia and nationally for at least two decades. This trend accelerated during the last recession as employment stalled or shrank in other sectors.

Industry Distribution

Ambulatory services accounted for about 39.1 % of payroll employment in Virginia's HC&SA sector, followed by hospitals at 25.8 %. Importantly, these figures include employed workers only. They do not include self-employed practitioners or volunteers.

Ambulatory health care services includes offices of independent practitioners, outpatient care centers, diagnostic laboratories, home health services and other ambulatory services. Hospitals include general, surgical, specialty and mental health hospitals. Nursing and residential care facilities include nursing homes, community care facilities and mental health related residential facilities. Social assistance includes individual and family services, food, housing and other relief services, vocational rehabilitation and child day care services.

Figure 4: Distribution of Virginia Health Care & Social Assistance



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The Department of Health Professions Healthcare Workforce Data Center works to improve the data collection and measurement of Virginia's healthcare workforce through regular assessment of workforce supply and demand issues among the 80 professions and 350,000 practitioners licensed in Virginia by DHP.

The HWDC collects data on Virginia's licensed health professionals through surveys completed during the online license renewal and application process. Survey results and data may be accessed on our website: www.dhp.virginia.gov/hwdc/.

The HWDC also provides a series of Virginia Healthcare Workforce Briefs based on data collected by the US Department of Labor's Bureau of Labor Statistics and the US Department of Commerce' Bureau of Economic Analysis.

Virginia Healthcare Workforce Briefs:

Series 1: State & National Employment (Monthly)

Series 2: Virginia Regional Employment (Monthly)

Series 3: Income & Compensation (Quarterly)

About the Data

Data in this report is from the US Department of Labor' Bureau of Labor Statistics' Current Employment Statistics program. The CES program surveys about 140,000 businesses and government agencies monthly. Unless otherwise noted, this series uses seasonally-adjusted data that removes seasonal variations related to weather, holidays, weekends, seasons and other predictable variations. This allows us to better examine underlying trends in the labor market. Data from recent months is preliminary and subject to revision in future releases from the CES. Revisions will be reported in future editions of this series. Unless otherwise noted, the CES data presented in this series:

Includes:

- ◆ Data on employed individuals drawing a paycheck (payroll employees).
- ◆ All employees, regardless of role, occupation or hours worked.
- ◆ HC&SA employees in the private sector only.
- ◆ Persons employed by health professionals in private practice.
- ◆ Both government and private sector workers in nonfarm employment data.

Does not include:

- ◆ Self-employed workers or volunteers, including health professionals in private practice.
 - ◆ HC&SA employees in the public sector. (These are counted as government workers in monthly reports. Approximately 54,500 of Virginia's public sector workers worked in the HC&SA sector in 2010 at the federal, state and local levels).
 - ◆ Information on hours worked or the quality of employment.
 - ◆ Government workers in HC&SA level data. (Government workers, regardless of occupation and role, are classified as public sector employees).
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