



Virginia Healthcare Workforce Briefs

Indicators from the Bureau of Labor Statistics'

Current Employment Statistics Survey

Series 1: State & National Employment

Series 1, Issue 5

May 2012

Highlights

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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.

- ♦ Health care & social assistance (HC&SA) employment in Virginia declined by 1,200 in April, a decrease of 0.31% from the previous month.
- ♦ March preliminary estimates for Virginia HC&SA Employment were revised upward by 500 jobs to 391,800. National HC&SA estimates were also revised upwards.
- ♦ YTD, Virginia's HC&SA sector added 4,000 jobs through March, an annualized rate of 3.1% for the first four months of 2012, down from an adjusted 5,200 jobs and 5.5% annualized growth over the first quarter
- ♦ Virginia's HC&SA sector accounted for 31.25% of Virginia's 2012 non-farm job growth through April, down from an adjusted 51.5% in March.
- ♦ Through April, Virginia accounted for 3.9% of national job growth in the HC&SA sector in 2012, down from an adjusted 4.6%. Through the 1st quarter.

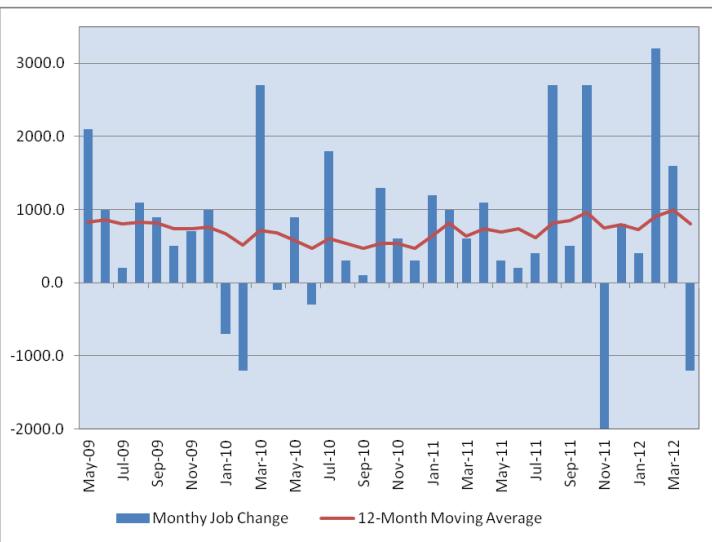
Data in Brief

Seasonally Adjusted*	Employment, in Thousands				Growth Rate, Annualized		
	Apr 2011	Jan 2012	Mar 2012	Apr 2012	12 month	3 month	1 month
Nonfarm, Total							
Virginia	3,680.7	3,703.3	3,712.8	3,715.5	0.9%	1.3%	0.9%
National	131,173.0	132,461.0	132,863.0	132,940.0	1.3%	1.5%	0.7%
Health & Social Assistance							
Virginia	381.0	387.0	391.8	390.6	2.5%	3.8%	-3.6%
National	16,571.0	16,831.1	16,913.4	16,934.3	2.2%	2.5%	1.5%
All Other Nonfarm							
Virginia	3,299.7	3,316.3	3,321.0	3,324.9	0.8%	1.0%	1.4%
National	114,602.0	115,629.9	115,949.6	116,005.7	1.2%	1.3%	0.6%

*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

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



According to preliminary data released May 18, 2012 by the US Department of Labor, Bureau of Labor Statistics, Virginia's HC&SA sector lost 1,200 payroll jobs in April, the first loss in the sector this year, tied for the 2nd highest loss in the sector since October, 2005. YTD growth declined to 4,000 jobs added, with February providing the bulk of job gains. The sector accounted for 31.25% of all of Virginia's job growth in the quarter.

This marks only the 2nd month of job losses for Virginia's HC&SA sector since July, 2010, but both monthly losses have been sharp. The drop was made even sharper by a 500 job upward revision in the March figures. Virginia's HC&SA sector added an average of 800 jobs each month over the last 12 months, compared to 741 jobs in the prior 12 month period, but the trend line shifted downward in April.

Employment Growth Rate

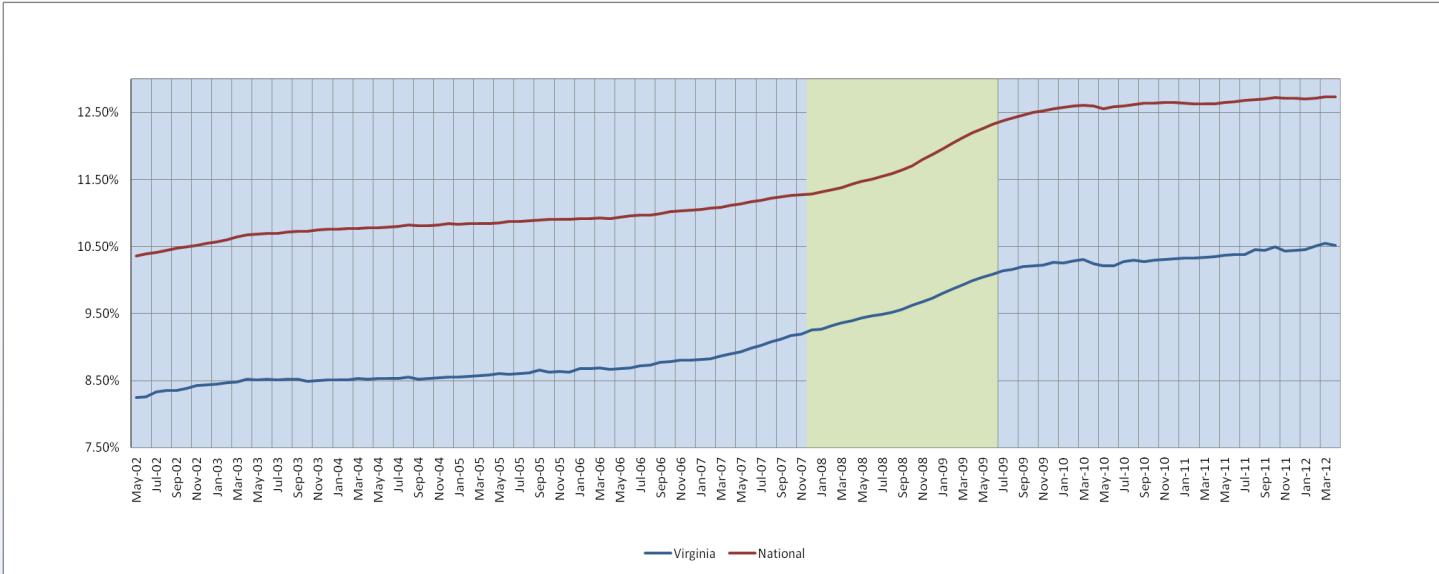
Virginia's HC&SA sector experienced especially strong growth just prior to the 2007-2009 recession. This is true when compared to growth in other time periods, growth in the national HC&SA sector and growth in non-HC & SA payrolls in Virginia. This strong growth continued into the beginning of the recession 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 0.31% according to preliminary data, compared to 0.12% growth in the sector nationally and compared to a 0.07% gain in Virginia's non-HC & SA payrolls. YTD, Virginia's HC&SA sector has grown 1.0%, compared to 0.8% for the sector nationally and 0.35% 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.



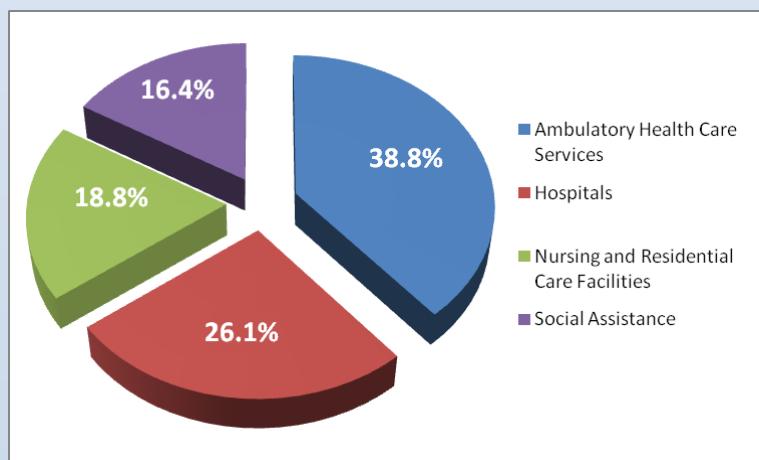
In April, Virginia's HC&SA sector experienced a pause in its growing importance as an employer in the Commonwealth. As of April, the HC&SA sector accounted for 10.51% of all payroll jobs in Virginia, a decrease of 0.38% from the prior month. Year-to-date, the HC & SA sector has captured an additional 0.06% share of Virginia's payroll jobs through April. Virginia's HC&SA sector is still smaller compared to the sector nationally. The HC & SA sector accounts for 12.74% of national payroll jobs in April. Virginia has captured 3.88% of national growth in the HC&SA sector year-to-date. 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 account for about 38.8 percent of payroll employment in Virginia's HC&SA sector, followed by hospitals at 26.1 percent. 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



Healthcare Workforce
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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.
- ◆ All employees, regardless of role or occupation or hours worked.
- ◆ Workers in the private sector.
- ◆ Persons employed by health professionals in private practice.

Does not include:

- ◆ Self-employed workers or volunteers, including health professionals in private practice.
- ◆ Public sector employees
- ◆ Information on hours worked or the quality of employment