



Virginia Healthcare Workforce Briefs

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

Series 1, Issue 13

January 2013

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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.

Highlights

- ◆ According to preliminary estimates, total employment in Virginia's HC&SA sector exceeded 400,000 payroll jobs for the first time.
- ◆ Virginia's HC&SA sector grew by 2,600 jobs in December, which represents a one-month annualized growth rate of 8.1%.
- ◆ Preliminary estimates indicate that Virginia's HC&SA sector added 13,700 jobs in 2012. This represents the best year in terms of employment growth for Virginia's HC&SA sector since 2008. In contrast, only 17,600 jobs were created in all other sectors of Virginia's economy during the year.
- ◆ With a 3.5% 12-month growth rate, employment in Virginia's HC&SA sector has grown seven-times faster than in Virginia's non-health care sector, which has only grown at a 0.5% rate over the past 12 months.
- ◆ November's preliminary estimate for Virginia's HC&SA employment was revised downward by 600 jobs. With this revision, Virginia's HC&SA sector added 300 jobs in November.

Data in Brief

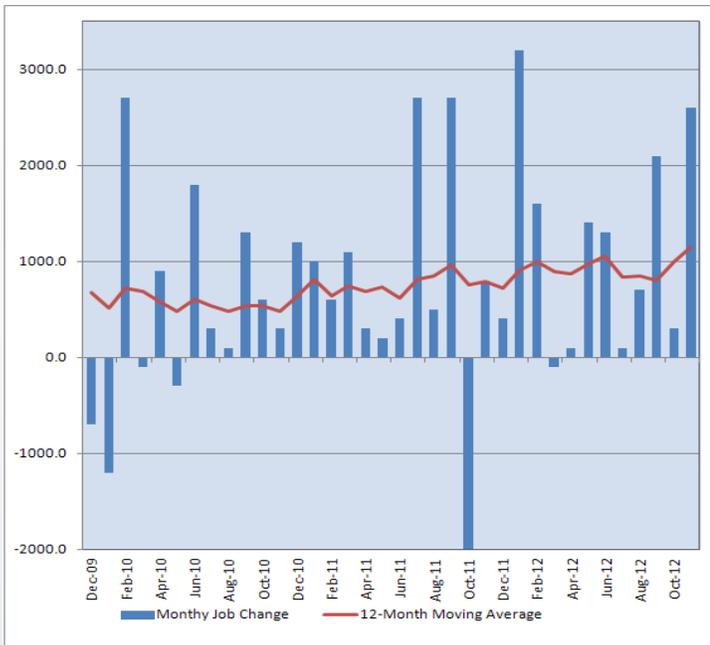
| Seasonally Adjusted* | Employment, in Thousands | | | | Growth Rate, Annualized | | |
|---------------------------------------|--------------------------|------------|------------------------|------------------------|-------------------------|---------|---------|
| | Dec. 2011 | Sept. 2012 | Nov. 2012 | Dec. 2012 | 12 Month | 3 Month | 1 Month |
| Nonfarm, Total | | | | | | | |
| Virginia | 3,702.7 | 3,729.5 | 3,739.0 | 3,734.0 ^P | 0.8% | 0.5% | -1.6% |
| National | 132,186.0 | 133,568.0 | 133,866.0 ^P | 134,021.0 ^P | 1.4% | 1.4% | 1.4% |
| Health & Social Assistance | | | | | | | |
| Virginia | 386.6 | 395.3 | 397.7 | 400.3 ^P | 3.5% | 5.2% | 8.1% |
| National | 16,800.3 | 17,067.0 | 17,136.7 ^P | 17,191.7 ^P | 2.3% | 3.0% | 3.9% |
| All Other Nonfarm | | | | | | | |
| Virginia | 3,316.1 | 3,334.2 | 3,341.3 | 3,333.7 ^P | 0.5% | -0.1% | -2.7% |
| National | 115,385.7 | 116,501.0 | 116,729.3 ^P | 116,829.3 ^P | 1.3% | 1.1% | 1.0% |

^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

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



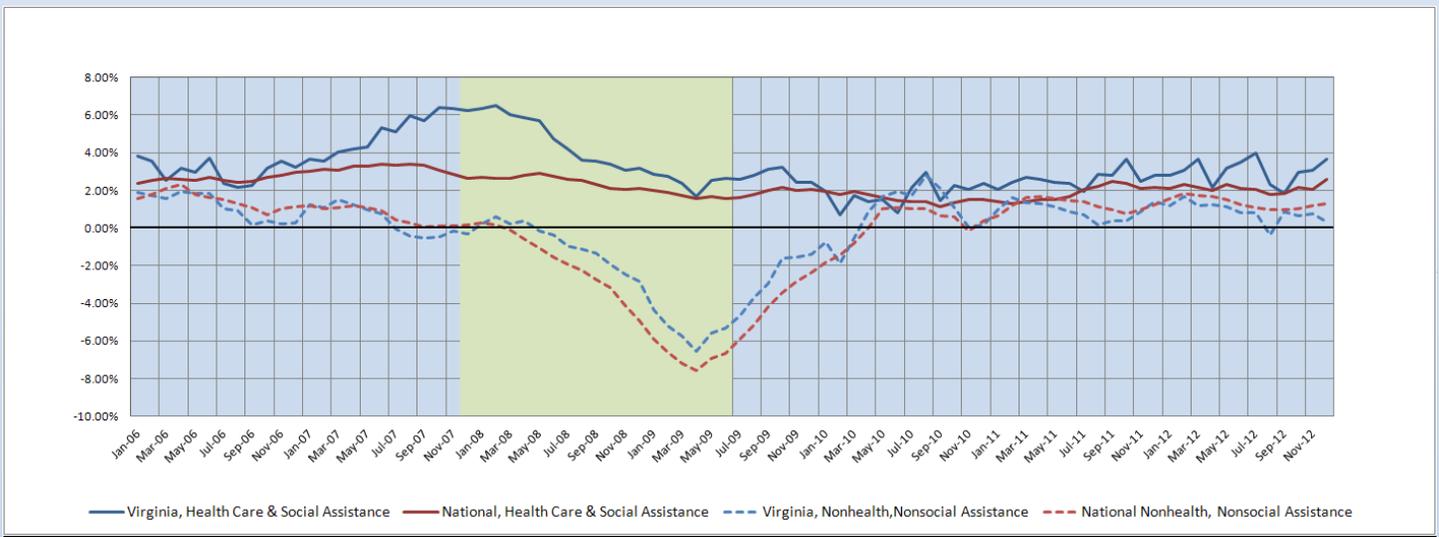
According to preliminary data released on January 18, 2013 by the US Department of Labor, Bureau of Labor Statistics, Virginia experienced a very strong month in terms of employment growth in its HC&SA sector, adding 2,600 jobs in December. With this increase, which represents the second-fastest month of job growth in 2012, Virginia's HC&SA sector reached a milestone as total employment in the industry exceeded 400,000 for the first time ever. However, November's preliminary estimate for HC&SA job growth was revised downward by 600 jobs, mitigating some of the gains from December. Revisions generally occur due to delayed responses from smaller establishments.

In 2012, Virginia's HC&SA sector is estimated to have added 13,700 jobs. This represents the strongest full-year performance for Virginia's health care sector since the 13,700 jobs that were also created back in 2008. This also represents a 44% increase from the full-year results in 2011, when 9,500 jobs were created in Virginia's HC&SA sector.

Employment Growth

In December, the six-month moving average of monthly employment growth in Virginia's HC&SA sector continued to outperform both non-HC&SA job growth in Virginia as well as overall HC&SA job growth in the United States. After Virginia's HC&SA sector added 2,600 jobs in December, the six-month moving average of its employment growth rate jumped to 3.7%, which represents its second highest value since the recession ended in 2009. Virginia's HC&SA sector is growing more than 1% faster than the national average for the health care industry, where the six-month moving average of monthly employment growth is 2.6%. Furthermore, Virginia's HC&SA sector is vastly outperforming the rest of the state's economy, which currently has a six-month moving average of monthly employment growth of only 0.3%, which represents its second-lowest value in 2012.

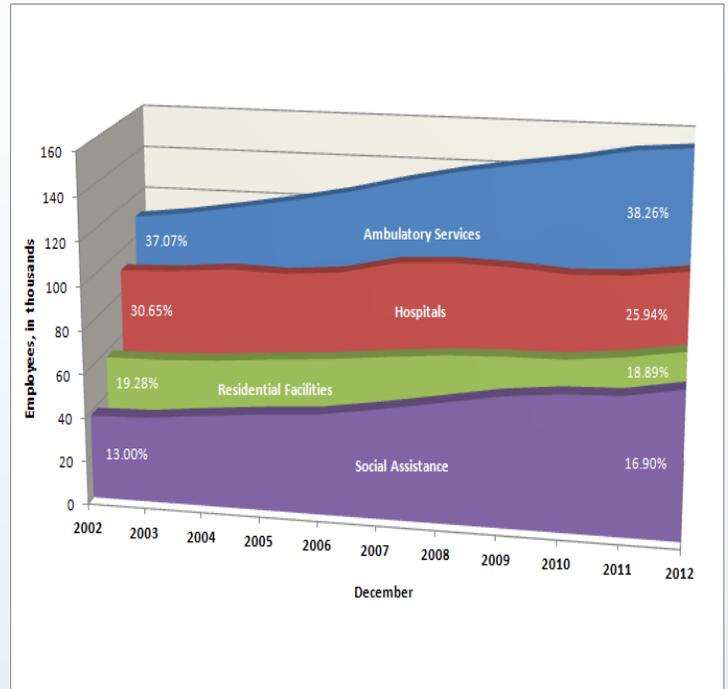
Figure 2: Six-Month Moving Average, Employment Growth, Seasonally Adjusted.



Industry Distribution

At the end of 2012, Ambulatory Services continued to be the single largest employer of health care workers in Virginia, hiring more than 38% of all workers in the industry, although it has seen its share drop by -0.8% in the past year. Meanwhile, Hospitals currently employ more than one-quarter of all health care workers, but this subsector has seen its employment share fall in each of the past five years. In addition, its employment share has fallen by nearly 5% over the past decade. Much of this loss in employment share has been made up by the Social Assistance subsector, which has increased its employment share by nearly 4% during the same time period, but it remains the smallest HC&SA subsector in terms of employment in the state. Finally, Residential Care Facilities currently employ approximately 19% of all health care workers. Although this is below the share recorded 10 years ago, Residential Care Facilities have seen a recent uptick in employment share; in fact, the 18.89% employment share at the end of 2012 is the highest value for Residential Care Facilities since 2006.

Figure 3: Distribution of Virginia’s HC&SA Employment by Subsector, Not Seasonally Adjusted

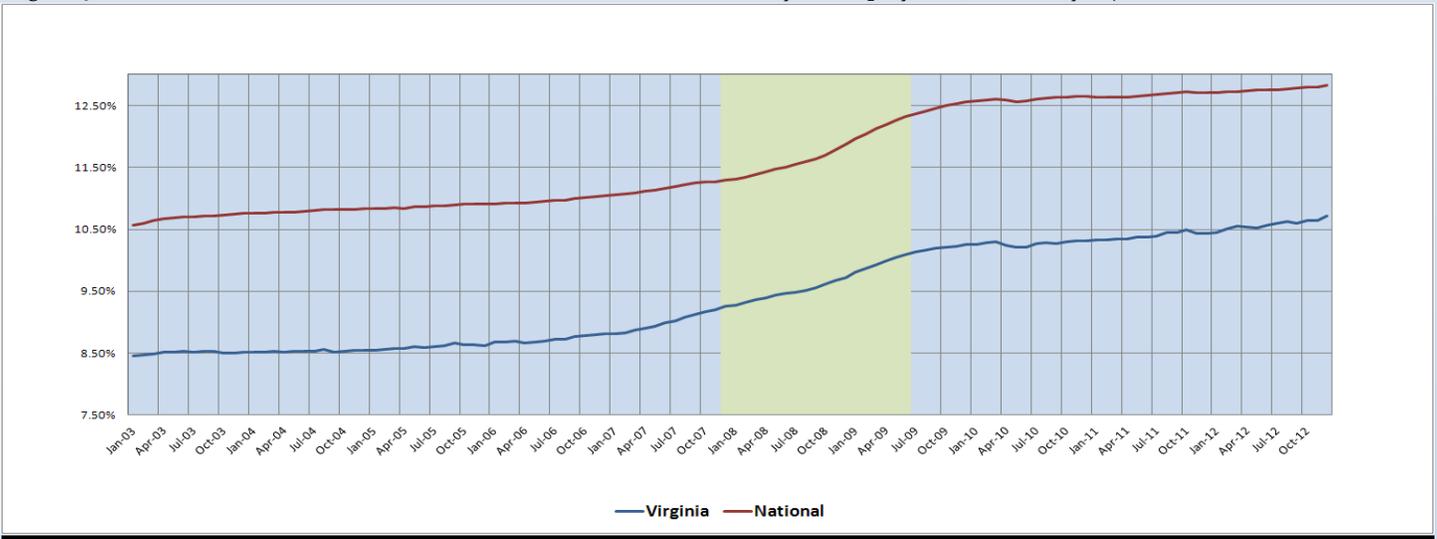


Share of Employment

In the past year, Virginia’s HC&SA sector has seen its share of total nonfarm payroll employment increase from 10.4% to 10.7%. The same trend manifested itself in the national HC&SA sector, where its share of total nonfarm payroll employment has increased marginally from 12.7% to 12.8%.

Both locally and nationally, the relative importance of the health care sector in terms of employment has increased over the past decade, especially during the recession years of 2008-2009. During this 10-year period, the share of total nonfarm payroll employment that is attributable to the HC&SA sector has increased by approximately 2% in both Virginia and the United States, although Virginia’s HC&SA sector employs relatively fewer workers compared to the national average.

Figure 4: The Health Care and Social Assistance Sector’s Share of Nonfarm Payroll Employment, Seasonally Adjusted



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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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