



Virginia Healthcare Workforce Briefs

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

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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, Virginia's Health Care & Social Assistance (HC&SA) sector added 1,900 jobs in December.
- ◆ The preliminary estimate for Virginia's HC&SA employment in November was revised downward by 700 jobs. Despite this downward revision, however, Virginia's HC&SA sector still added 1,500 jobs in November.
- ◆ Although Virginia's HC&SA sector saw another strong month of employment gains, December's results are most notable for the loss of 1,000 jobs in the national HC&SA sector. This represents the first time in more than four years in which national HC&SA employment has experienced a monthly decline.
- ◆ Virginia's total nonfarm payroll increased by 3,100 jobs in December. With this gain, Virginia's economy added 31,500 in 2013. Virginia's HC&SA sector has been responsible for 8,600 of those jobs, which represents more than one-quarter of all employment growth in 2013.
- ◆ With total nonfarm payroll increasing by only 74,000 in December, the national economy experienced its weakest month of employment gains in nearly three years. For the full year of 2013, the national economy added 2.2 million jobs; the national HC&SA sector was responsible for 12.96% of this growth.

Data in Brief

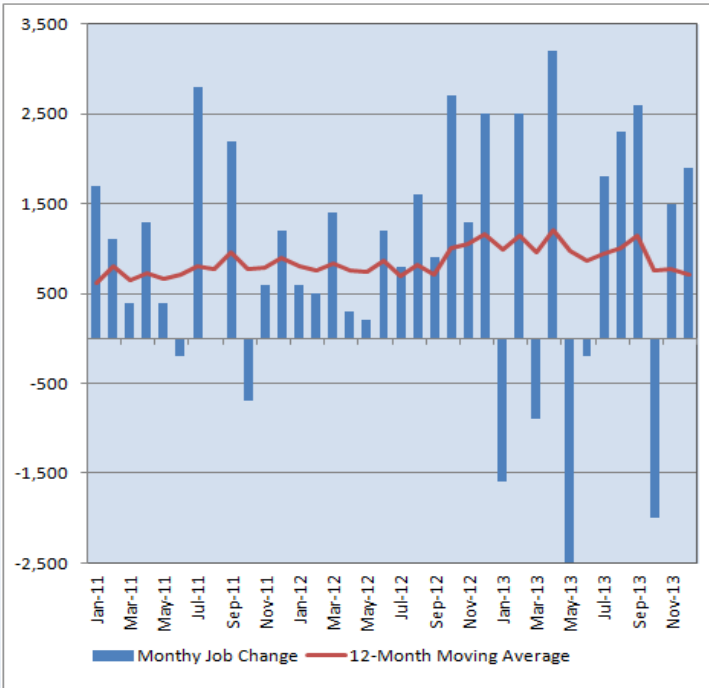
Seasonally Adjusted*	Employment, in Thousands				Growth Rate, Annualized		
	Dec. 2012	Sept. 2013	Nov. 2013	Dec. 2013	12 Month	3 Month	1 Month
Nonfarm, Total							
Virginia	3,745.8	3,772.9	3,774.2	3,777.3	0.8%	0.5%	1.0%
National	134,691.0	136,362.0	136,803.0	136,877.0	1.6%	1.5%	0.7%
Health & Social Assistance							
Virginia	401.4	408.6	408.1	410.0	2.1%	1.4%	5.7%
National	17,150.9	17,377.8	17,435.1	17,434.1	1.7%	1.3%	-0.1%
All Other Nonfarm							
Virginia	3,344.4	3,364.3	3,366.1	3,367.3	0.7%	0.4%	0.4%
National	117,540.1	118,984.2	119,367.9	119,442.9	1.6%	1.6%	0.8%

Preliminary estimates are italicized

*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.

Virginia HC&SA Employment

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



According to preliminary data released on January 28, 2014 by the U.S. Department of Labor, Bureau of Labor Statistics, Virginia's HC&SA sector ended 2013 on a positive note by adding 1,900 jobs in December. However, November's preliminary estimate for HC&SA employment was revised downward by 700 jobs. With this downward revision, 1,500 HC&SA jobs were added in November.

In 2013, Virginia's HC&SA sector added 8,600 jobs to the state's economy. Although Virginia's HC&SA sector is responsible for more than one-quarter of all employment gains in the state over the past year, this also represents the lowest full-year total for HC&SA employment since 2010, when only 5,500 jobs were created in the sector.

The relatively poor performance of Virginia's HC&SA sector in 2013 can be explained by overall trends in the state's economy. For the full year 2013, total nonfarm payroll increased by 31,500. This represents the worst year for employment in the state since the recession year of 2009, when the state lost 110,200 jobs.

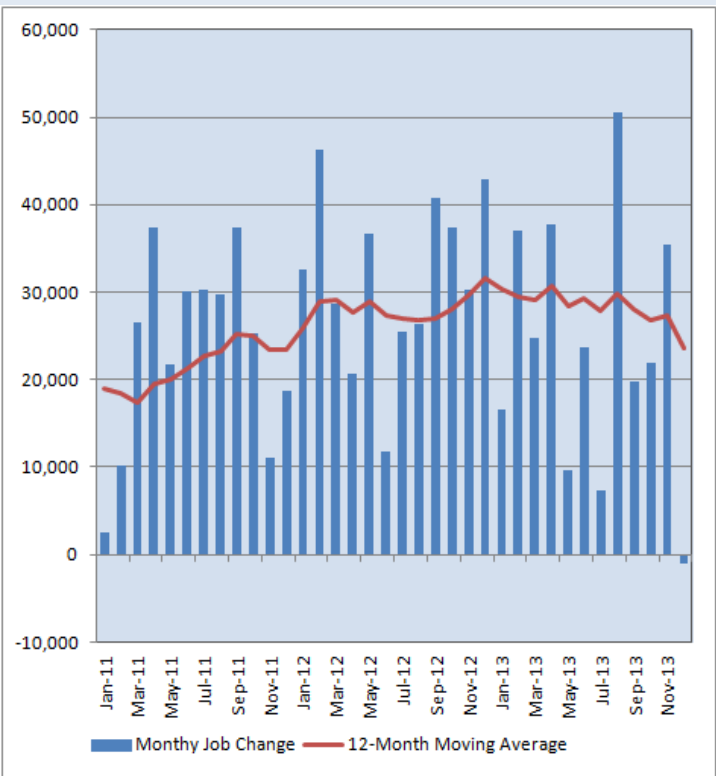
National HC&SA Employment

According to preliminary estimates, the national HC&SA sector lost 1,000 jobs in December. This represents the first monthly decline in the national HC&SA sector since September 2009, when the sector lost 12,800 jobs. In addition, this is remarkably just the third time since 2000 in which HC&SA employment has experienced a month-over-month decline.

The decline in national HC&SA employment in December dragged down the 12-month moving average of HC&SA employment to just 23,600 jobs. With this decline, the 12-month moving average of national HC&SA employment has fallen to its lowest level in two years. Likewise, the year-over-year growth rate in the national HC&SA sector is now just 1.7%, reaching its lowest value in two and a half years.

In 2013, the national HC&SA sector added 283,200 jobs. This represents a decline of 25% with respect to the previous year, during which 379,500 HC&SA jobs were added to the national economy. With 31,500 jobs added in 2013, Virginia's HC&SA sector has been responsible for 3.0% of this total increase. In comparison, Virginia's HC&SA sector was responsible for 3.7% of total HC&SA job growth in 2012

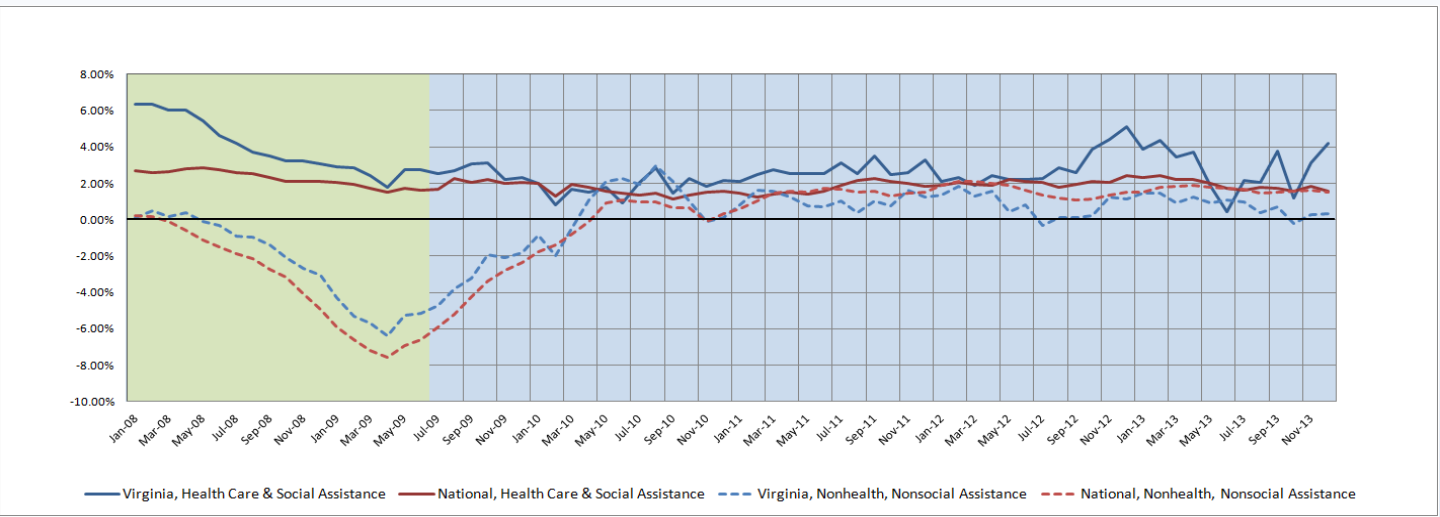
Figure 2: Monthly Change in Employment in National Health Care & Social Assistance Sector, Seasonally Adjusted.



Employment Growth

The six-month moving average of Virginia's HC&SA employment growth continued its advance in December. After increasing from 1.2% to 3.1% in November, the six-month moving average of Virginia's HC&SA employment growth increased by one-third in December to 4.2%. This represents the highest value for the six-month moving average of Virginia's HC&SA employment growth since February, when the six-month moving average reached 4.4%. Meanwhile, after falling into negative territory in October, the six-month moving average of employment growth in Virginia's non-HC&SA sectors increased for the second consecutive month in December to 0.3%. Regardless, the disparity in the six-month moving averages between Virginia's HC&SA and non-HC&SA sectors reached its largest level of 2013 in December.

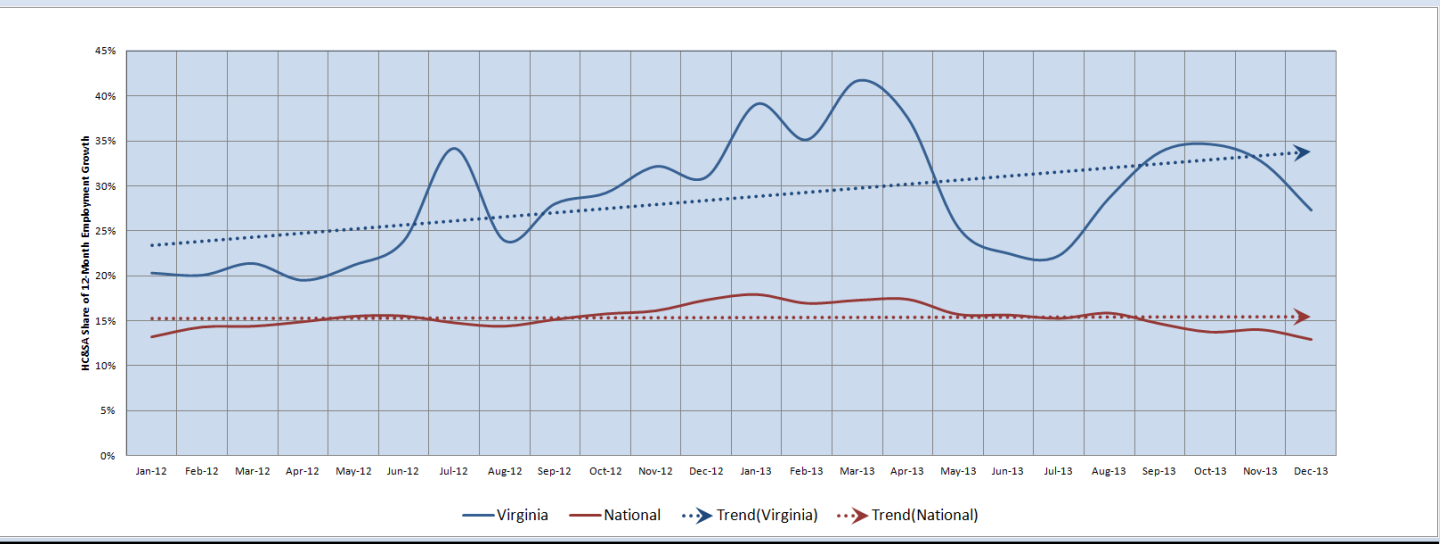
Figure 3: Six-Month Moving Average, Employment Growth, Seasonally Adjusted



Share of Employment Growth

Despite the increase of 1,900 HC&SA jobs in December, the share of Virginia's 12-month employment growth that is attributable to the HC&SA sector declined from 33% to 27%. This is the lowest value for Virginia's HC&SA employment growth share since falling to 22% in July. In addition, Virginia's 12-month HC&SA employment growth share has fallen by 30% since the beginning of the year, when Virginia's HC&SA sector was responsible for nearly 40% of all employment growth in the state during the previous 12 months. Meanwhile, the national HC&SA sector has seen its 12-month employment growth share fall yet again in December, reaching a full-year low of just 13%.

Figure 4: HC&SA Share of 12-Month Employment Growth, 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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