

The Structure of the Healthcare Sector and Healthcare Occupations in Massachusetts

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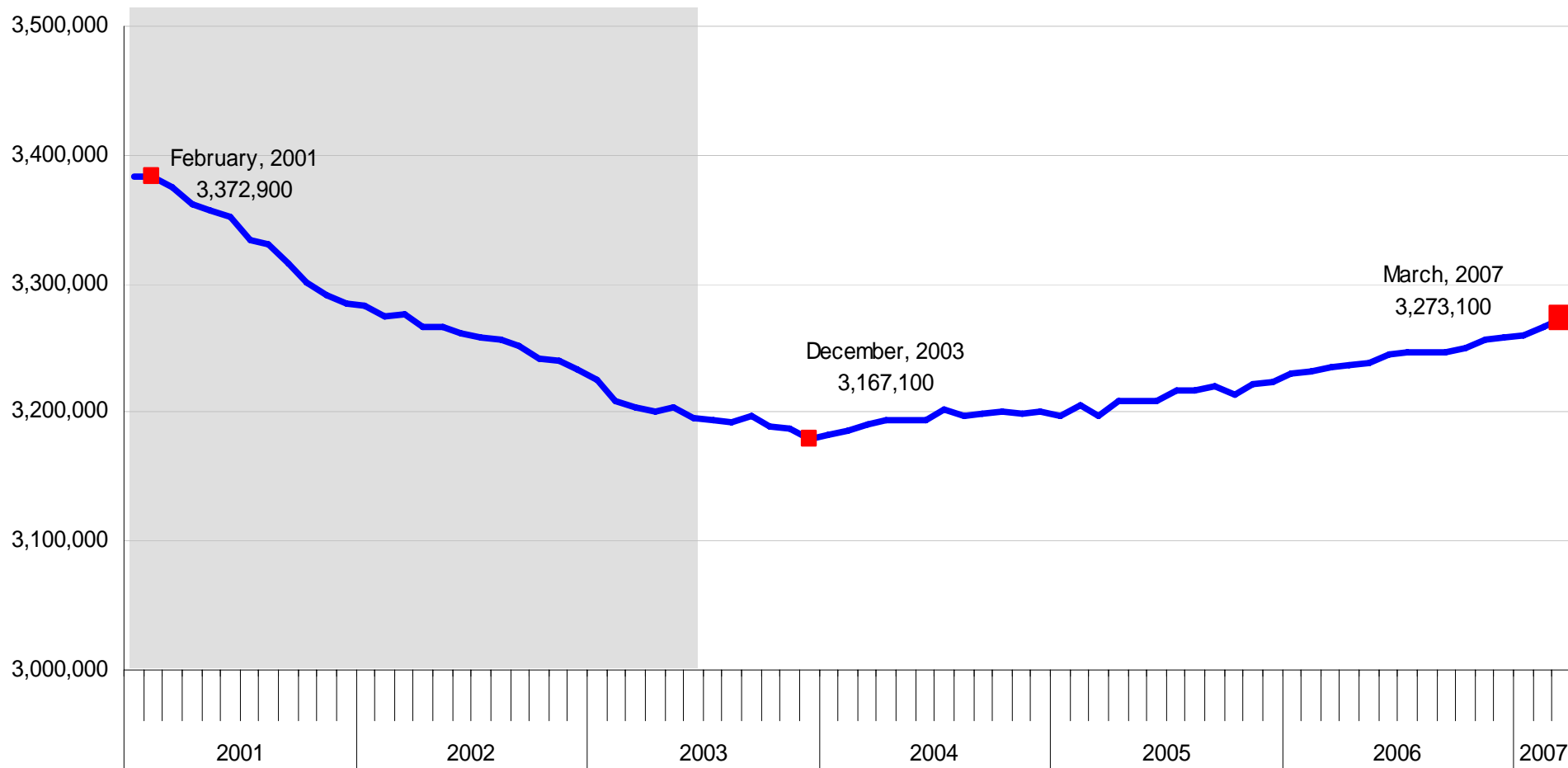
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Massachusetts Employment Trends

Employment is recovering from recession, but has not equaled its Peak: Feb, 2001
MA is 1 of 6 states that has not reached pre-recessionary employment numbers*

January, 2001 – March, 2007



Source: Department of Labor and Workforce Development
CES Data, Seasonally Adjusted Data
*Massachusetts Budget and Policy Center, State of Working
Massachusetts, 9/3/06



Do We Have Enough Workers Now?

Many people are still seeking work

In May '07, 101,300 fewer jobs than at peak Feb '01

From 2000 to 2006, virtually no population growth

From Q1 '01 to Q1 '07:

- 71,790 more “unemployed”

From 2000 to 2006

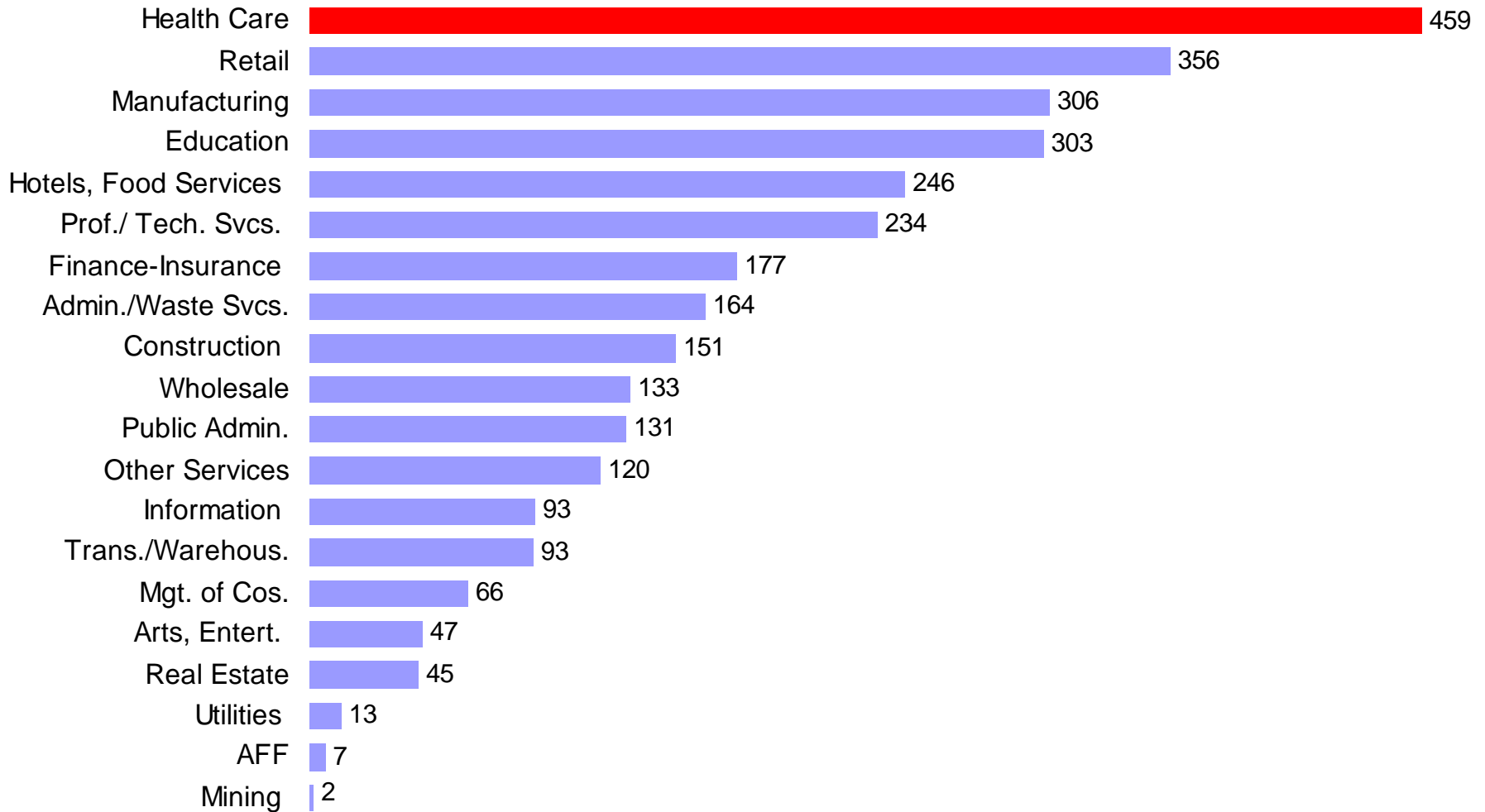
- 21,100 more working part- time
- 15,200 more marginally attached –stopped looking for jobs recently:
 - 3,000 more “discouraged”
 - 12,200 more stopped due to family or transportation reasons

From 2000 to 2004

- 47,500 more “non-employer” businesses in 2004 compared to 2000

Number of Massachusetts Workers Employed by Sector, 2005

Employment ('000)



What is included in the “Healthcare” sector?

Ambulatory Care **(Outpatient Treatment)**

- Doctor’s Offices
- Dentist’s Offices
- Home Care Services
- Outpatient Care Centers
- Other Health Practitioners
- Other Ambulatory Care Services
- Medical laboratories

Hospitals **(Inpatient Treatment)**

- General Hospitals
- Other Hospitals
- Psychiatric Hospitals

Nursing Care Facilities **(Care for the Elderly)**

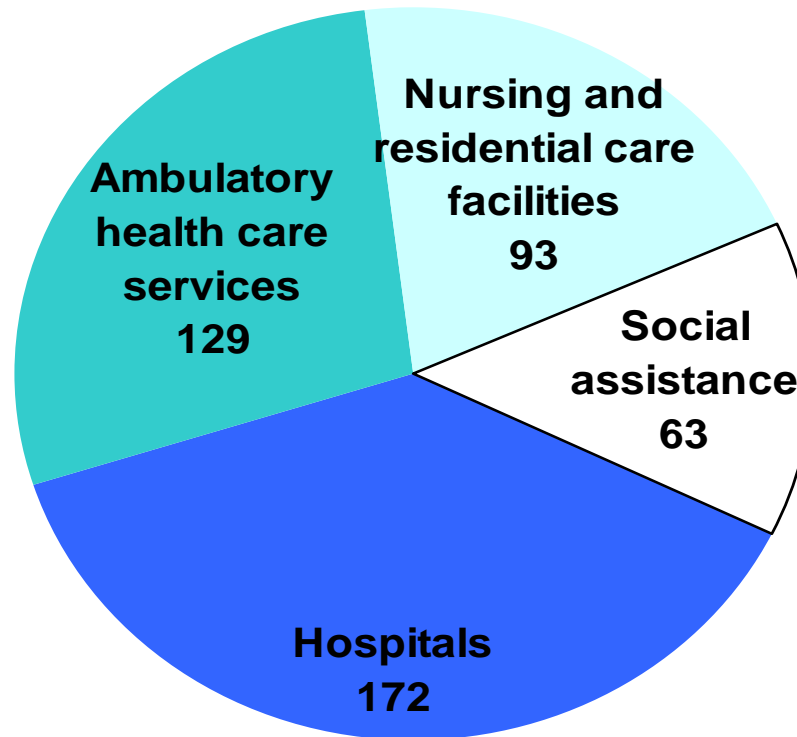
- Nursing Homes
- Residential Mental Health Facilities
- Community Care Facilities for the Elderly
- Other Residential Care Facilities

Social Assistance **(Social Services)**

- Individual & Family Services
- Child Day Care Services
- Vocational Rehabilitation Services
- Emergency & Other Relief Services

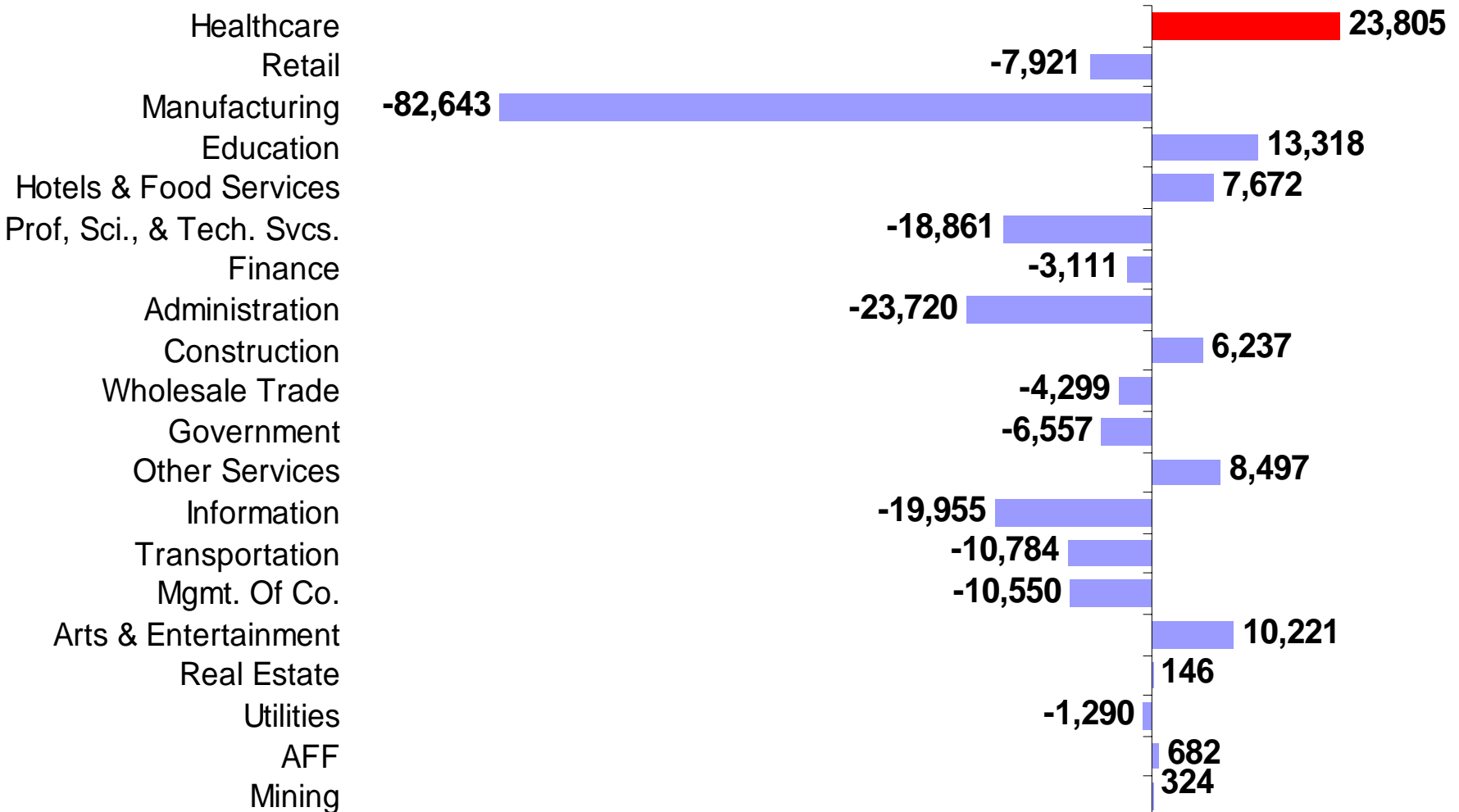
Proportion of Total Massachusetts Workforce Employed by Healthcare Sub-Sector, 2005

Sector
2005 Employment ('000)
Share of Mass. Employment



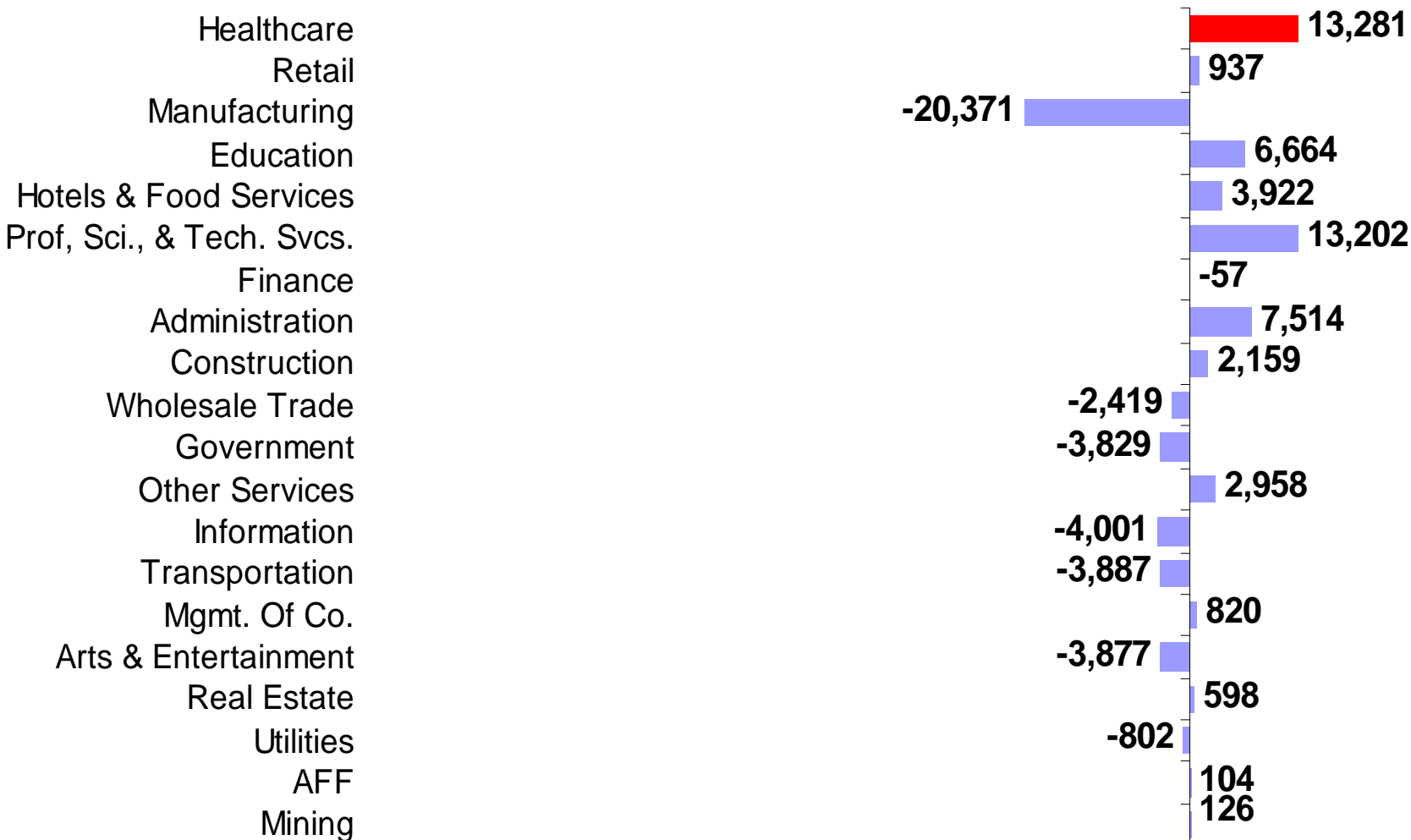
Slide 4: Sector Level Employment Trends (2000 – 2003)

Change in Employment 2001 - 2003



Slide 5: Sector Level Employment Trends (2003 – 2005)

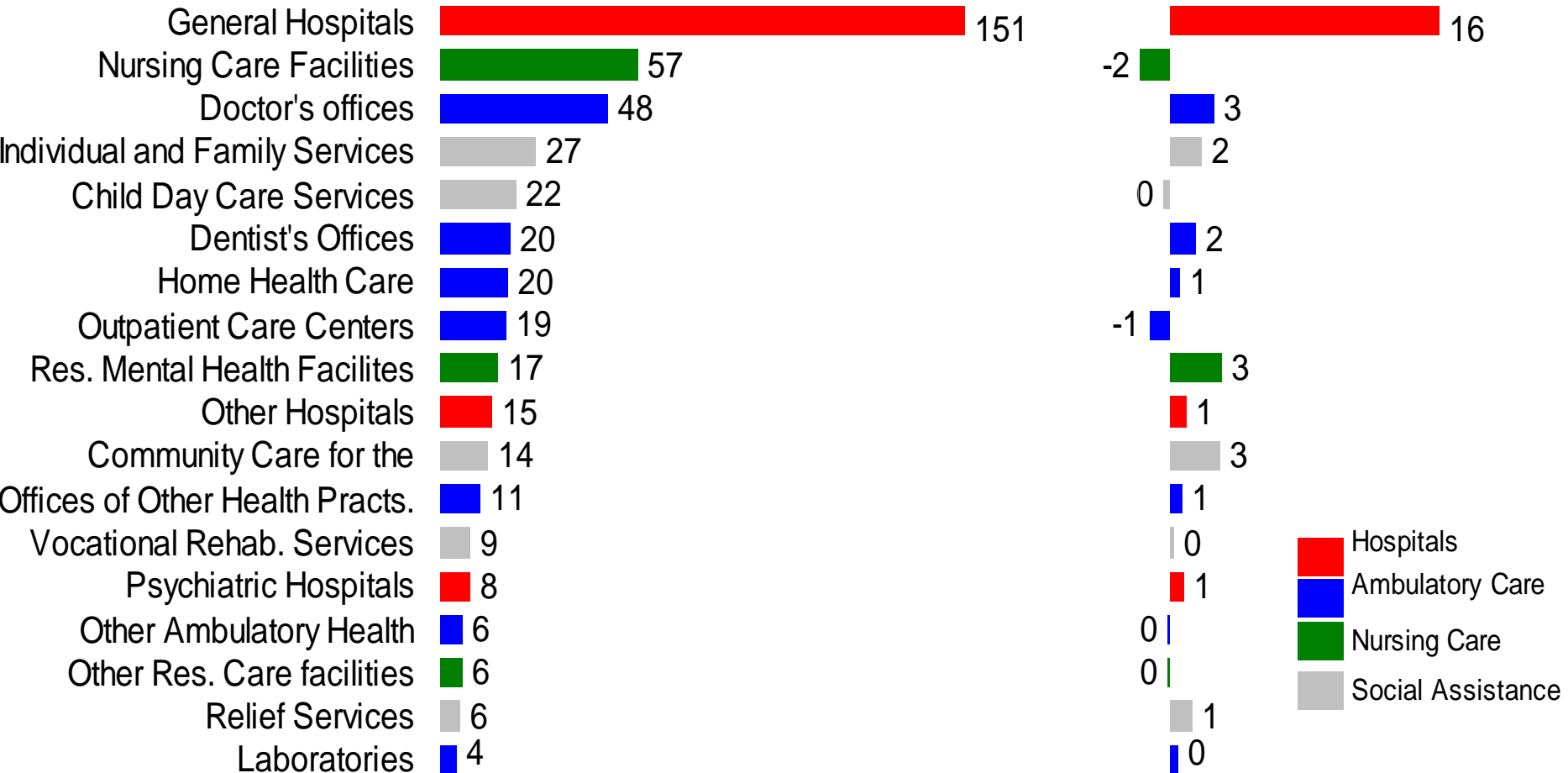
Change in Employment 2003 - 2005



Healthcare Industry Group Level Employment (2005) and Trends (2001 – 2005)

2005 Employment ('000)

Change from 2001 ('000)



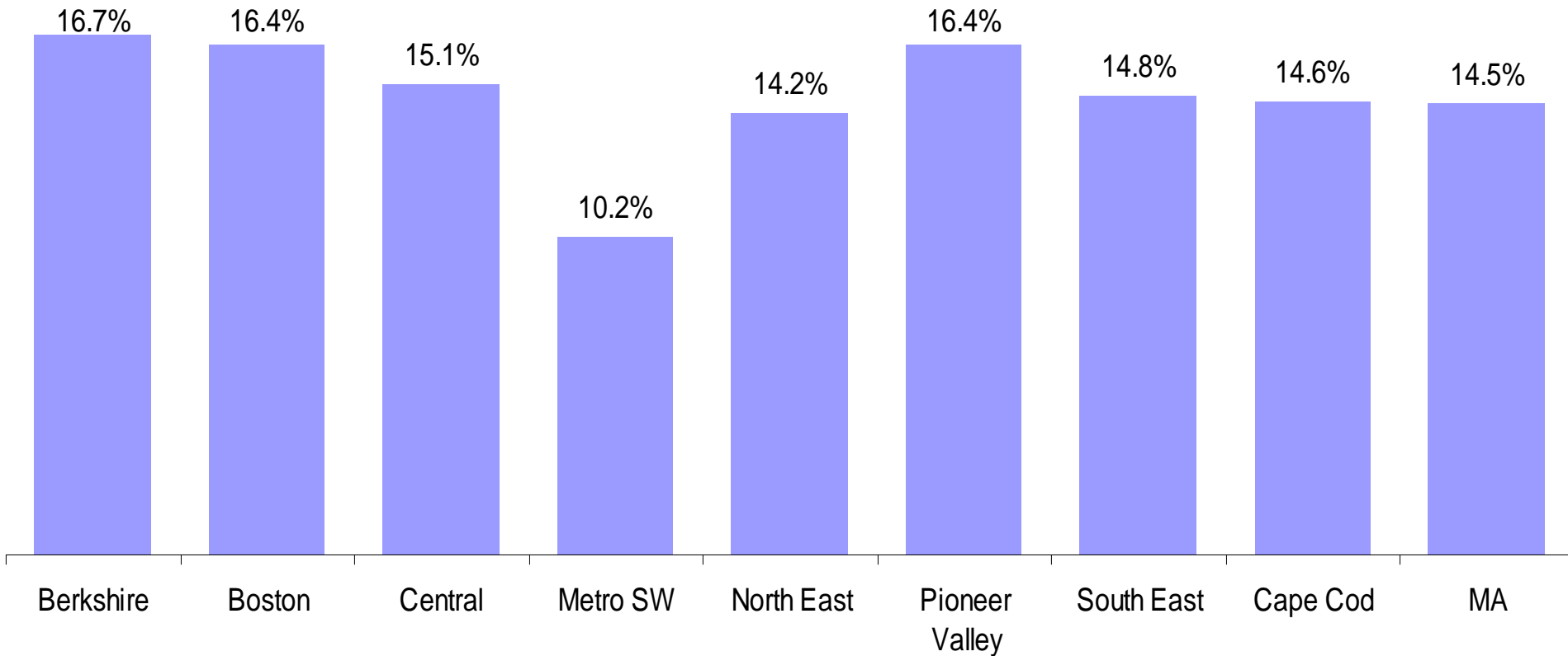
■ Hospitals
■ Ambulatory Care
■ Nursing Care
■ Social Assistance

Source: Bureau of Labor Statistics
Quarterly Census of Employment & Wages

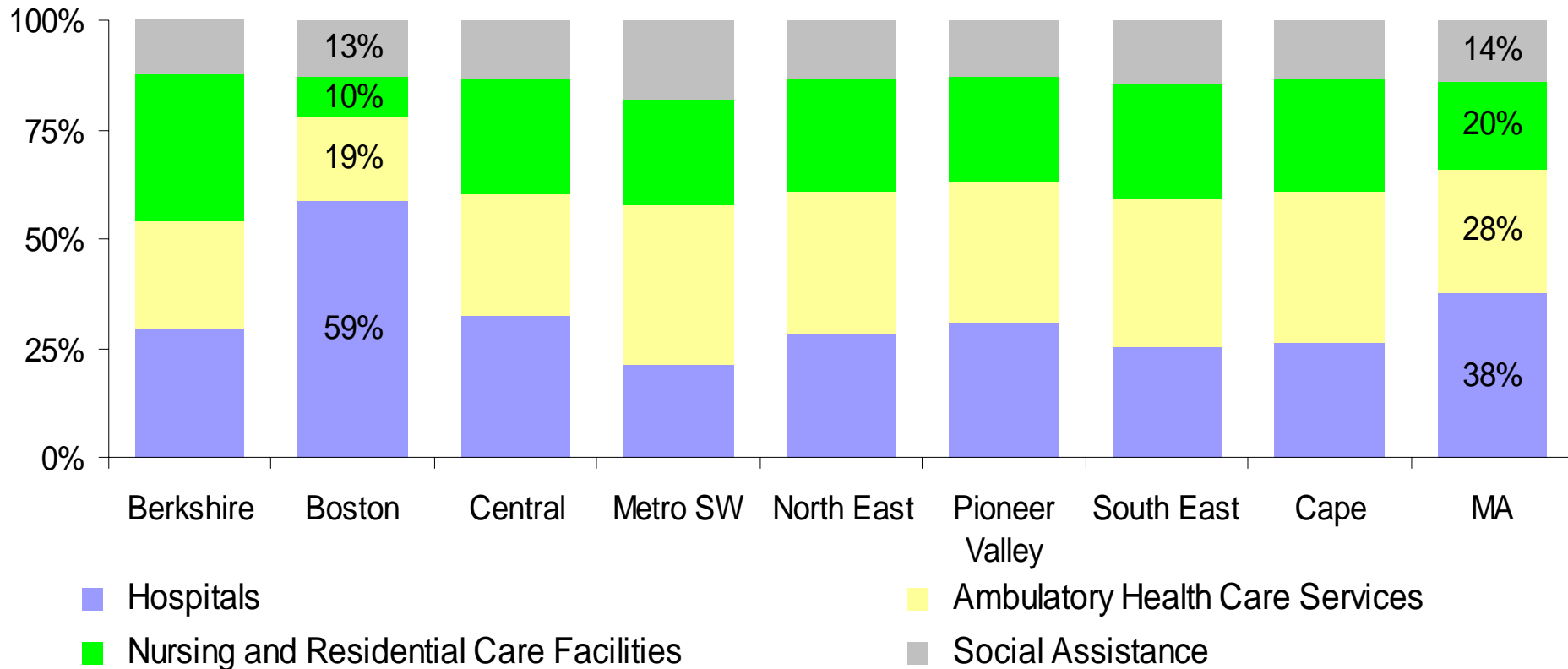


Regional Employment in the Healthcare Industry

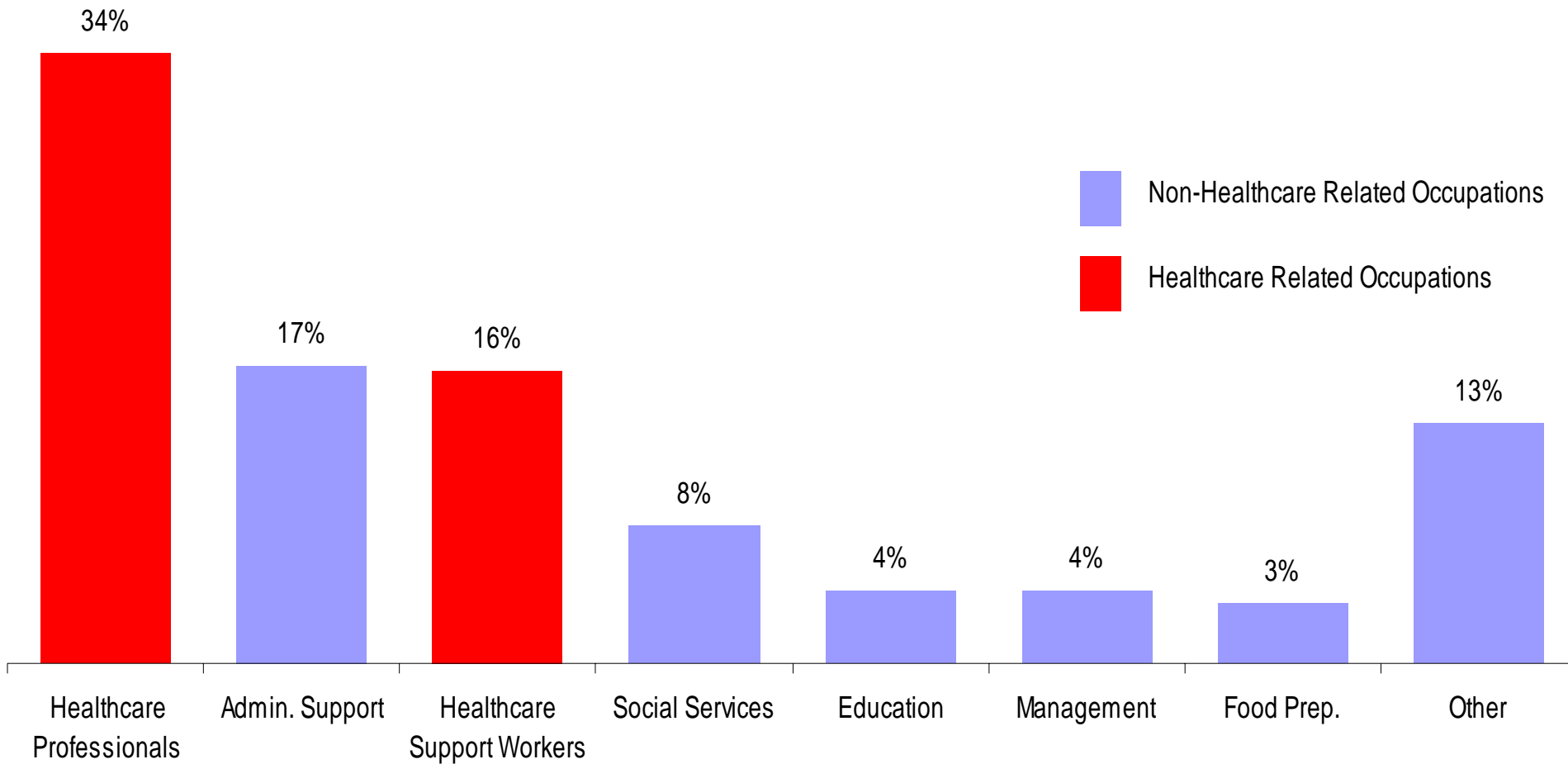
2005 Employment



Regional Structure of the Healthcare Industry



Healthcare Occupations Comprise 50% of Healthcare & Social Assistance Sector



Industry Sectors and Occupations

86% of Healthcare professionals and 81% of Healthcare support occupations work in the Healthcare sector

Share (%) of Employees from Major Occupational Groups Working in Healthcare

Industry	All Occupations	Management	Business Fin. Ops.	Life, Phy. Soc. Science	Community Social Svcs	Education	Healthcare Professionals	Healthcare Support Workers	Building Grounds	Food Prep.	Office & Admin
Healthcare	14%	9%	4%	9%	60%	9%	79%	81%	11%	6%	14%
Retail							5%	1%			
Education							5%	2%			
Govt.							4%	8%			
Admin. Svcs.							2%	4%			
Prof. Tech. Svcs.							3%	2%			
Total							100%	100%			

Source: Mass. Department of Workforce Development
Industry-Occupation Crosswalk

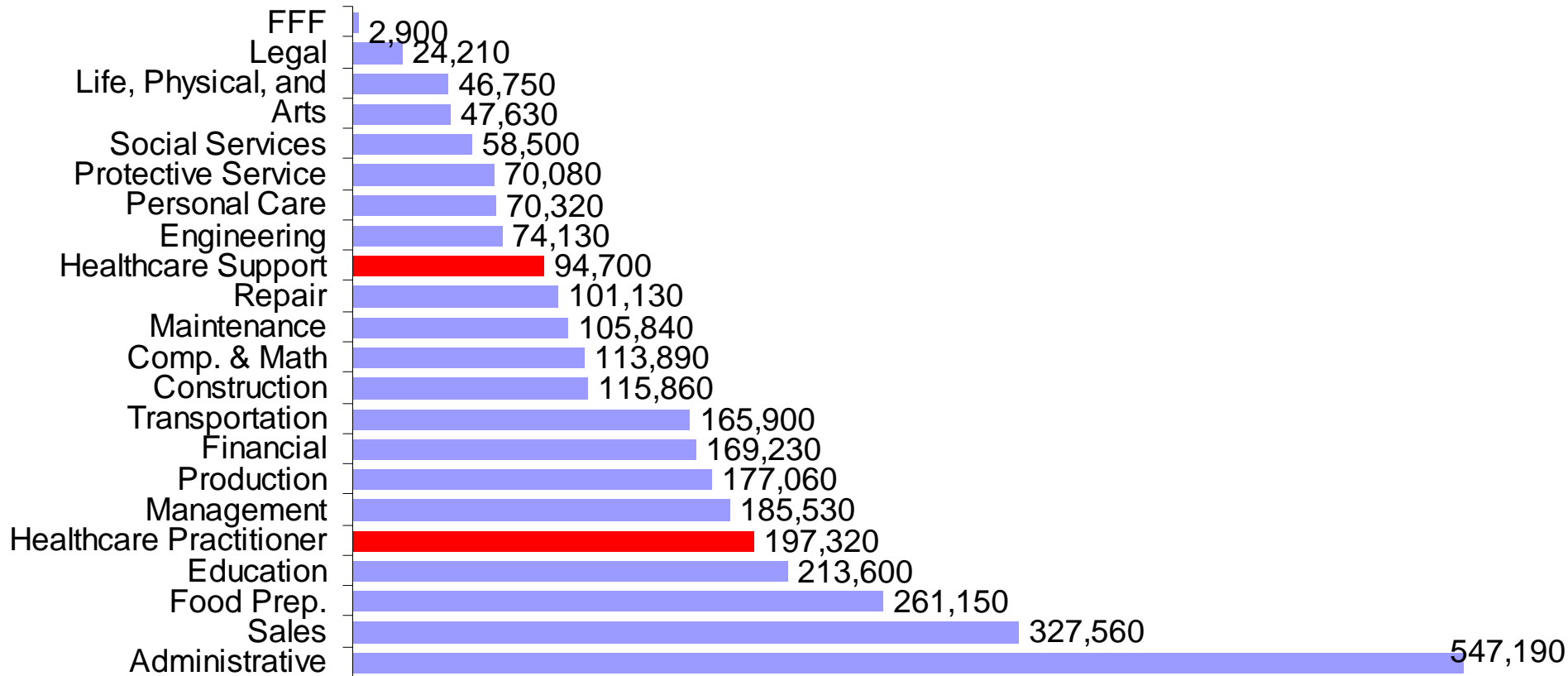
2001 - 2006 Occupational Pay Structure

	2001		2006		% Increase
	Median Salary	% of MA	Median Salary	% of MA	
All Occupations	\$32,210	100%	\$37,350	100%	16%
Healthcare Professionals	\$45,250	140%	\$60,320	161%	33%
Healthcare Support Workers	\$22,590	70%	\$27,480	74%	22%

9% workers are in Healthcare occupations

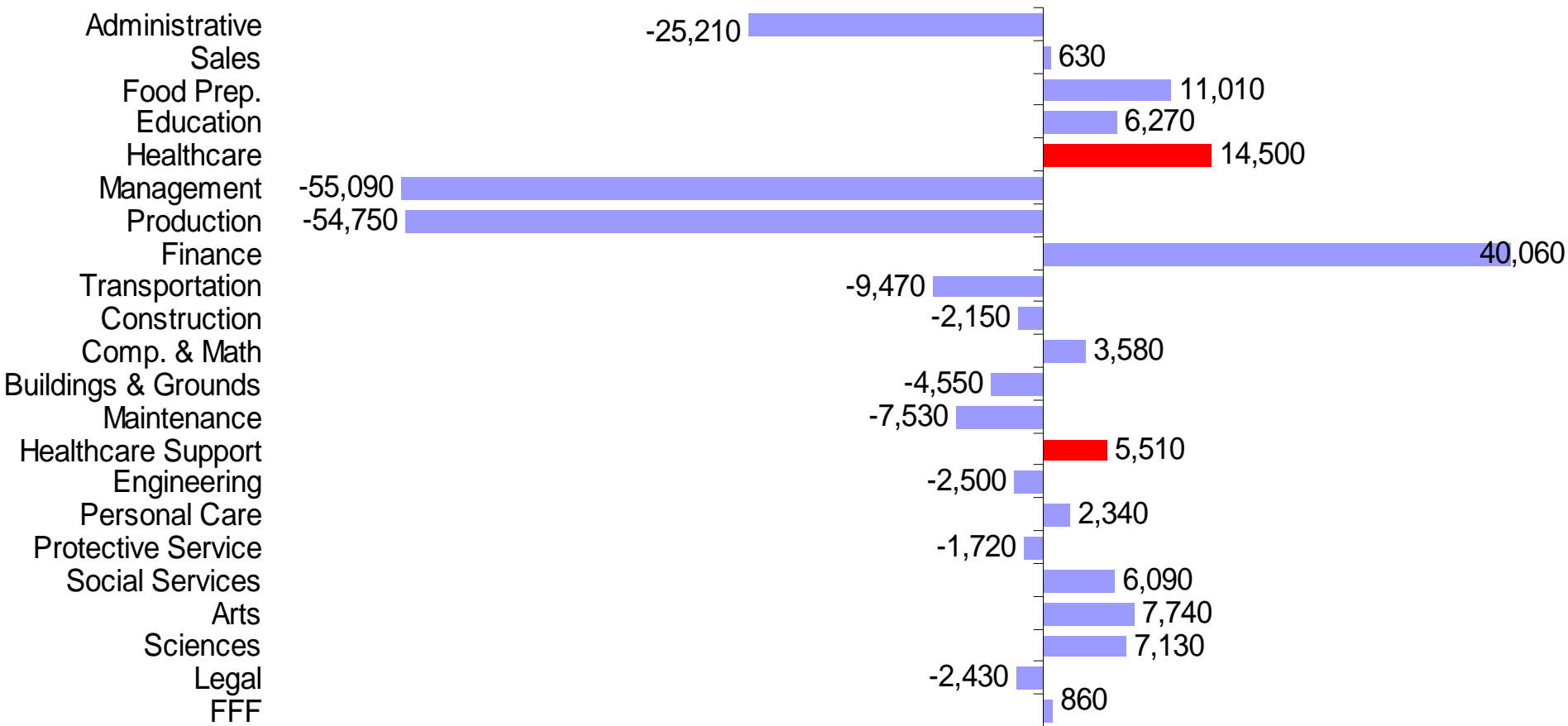
6% are Professionals, 3 % Support workers

Major Occupational Group 2006 Employment ('000)

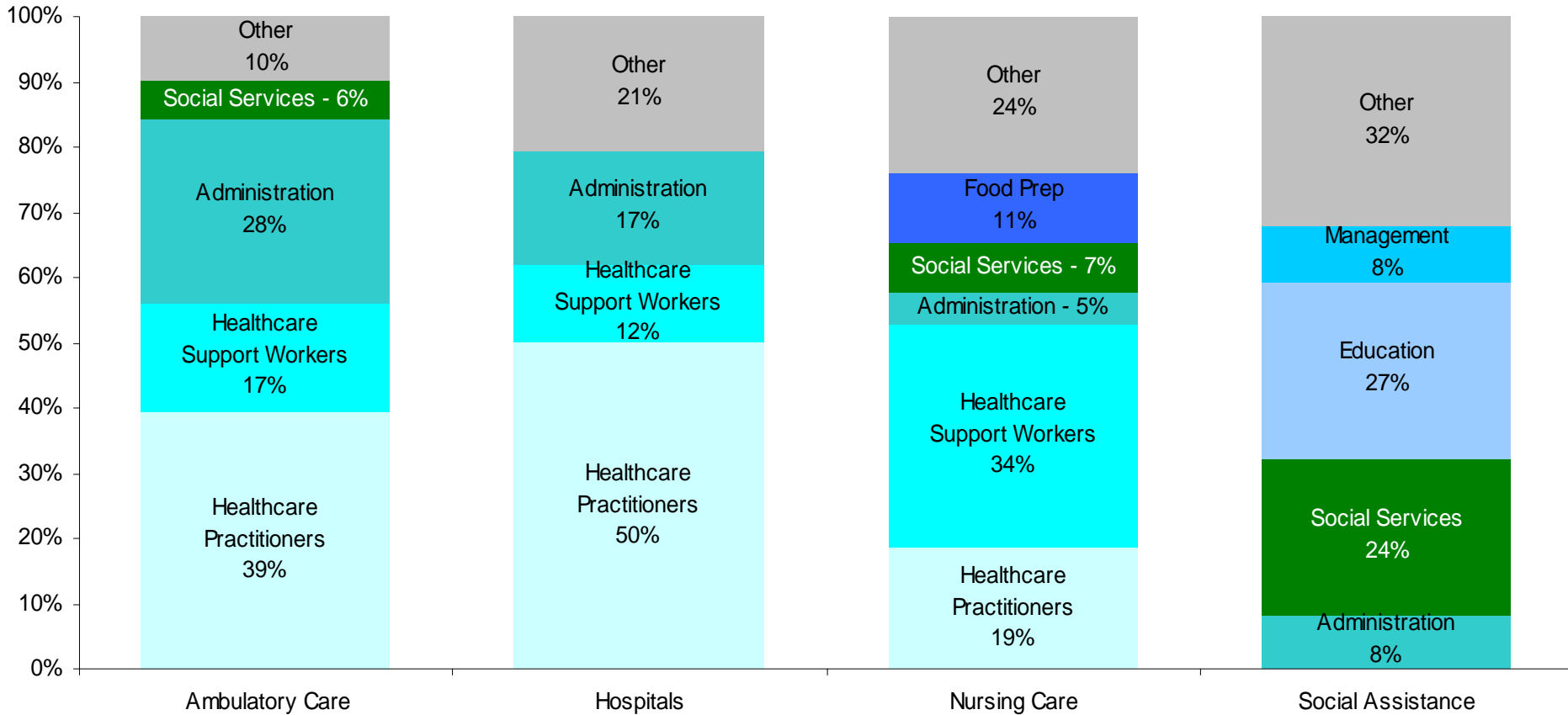


Healthcare occupations are growing

Change in Employment 2001-2006

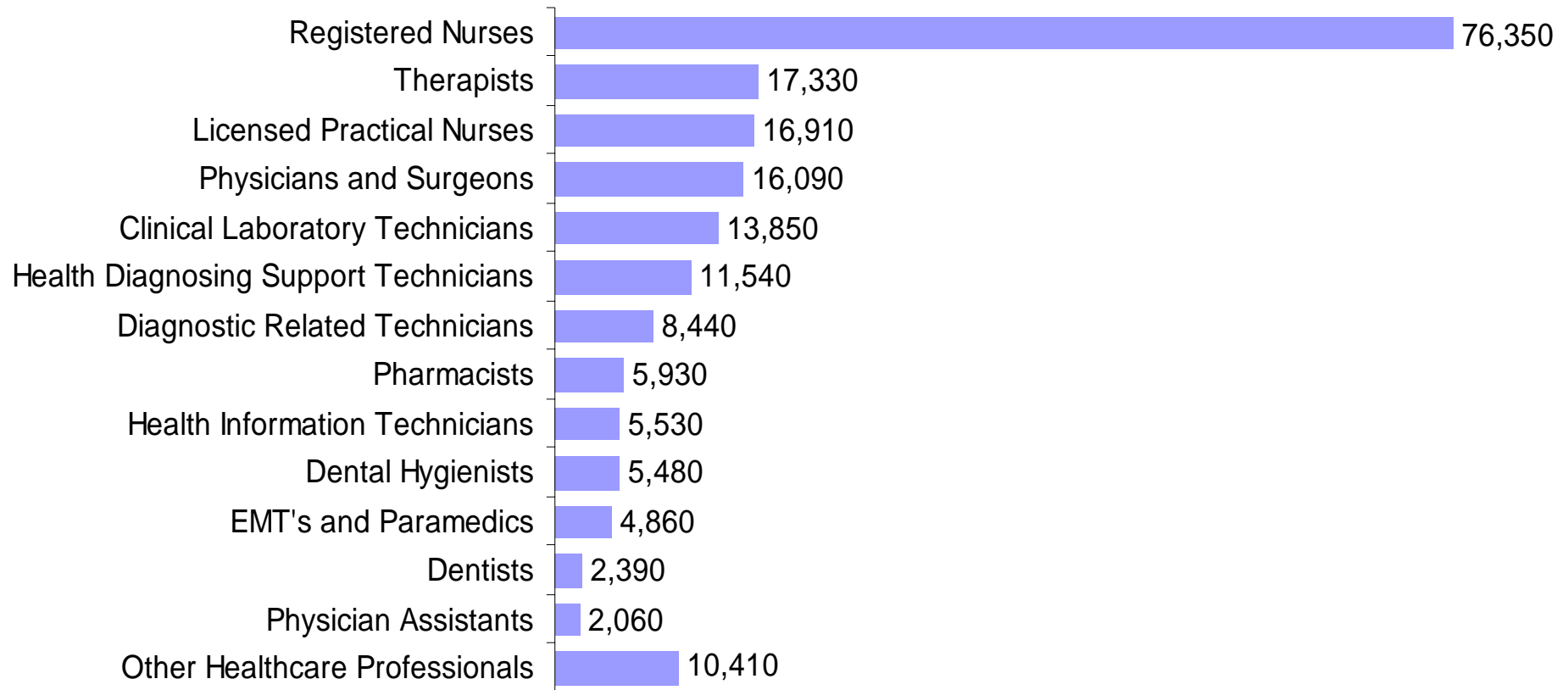


Social Assistance & Nursing Care exhibit a much more diversified workforce



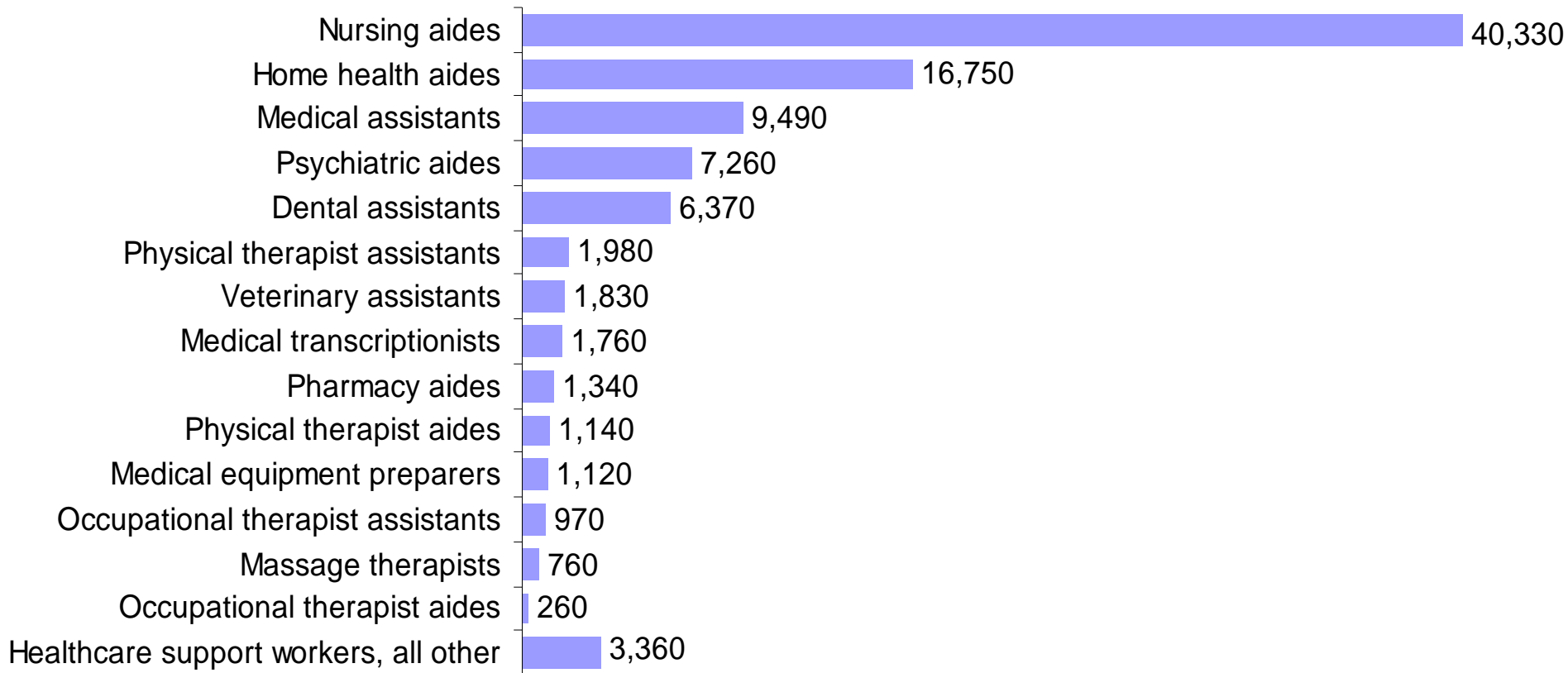
Half of Healthcare professionals are nurses

77,000 RNs, 17,000 LPNs, Large no. of therapists, technologists, and technicians



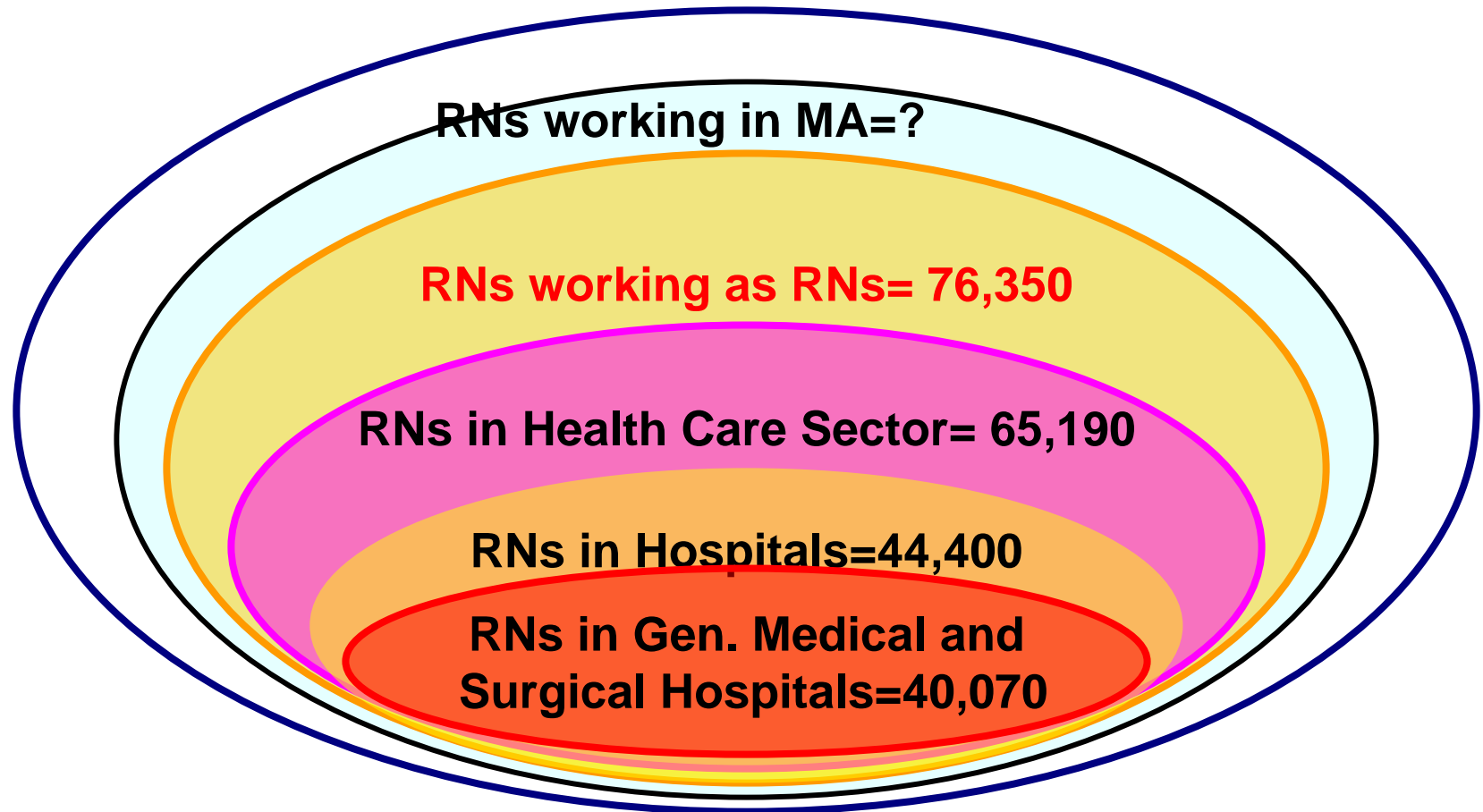
Who are Healthcare Support workers?

Almost half are nursing aides- 41,000

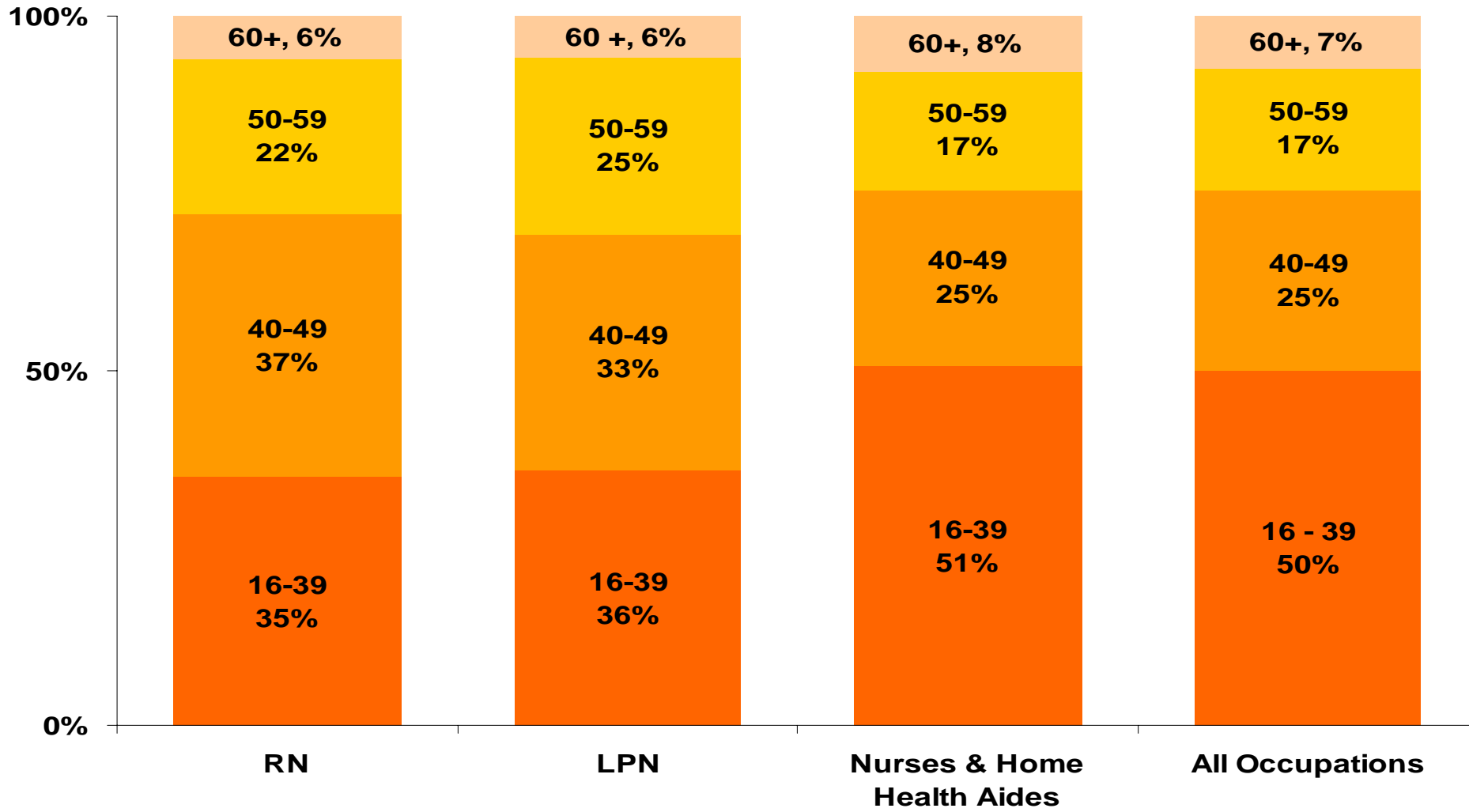


Where are all the registered RNs?

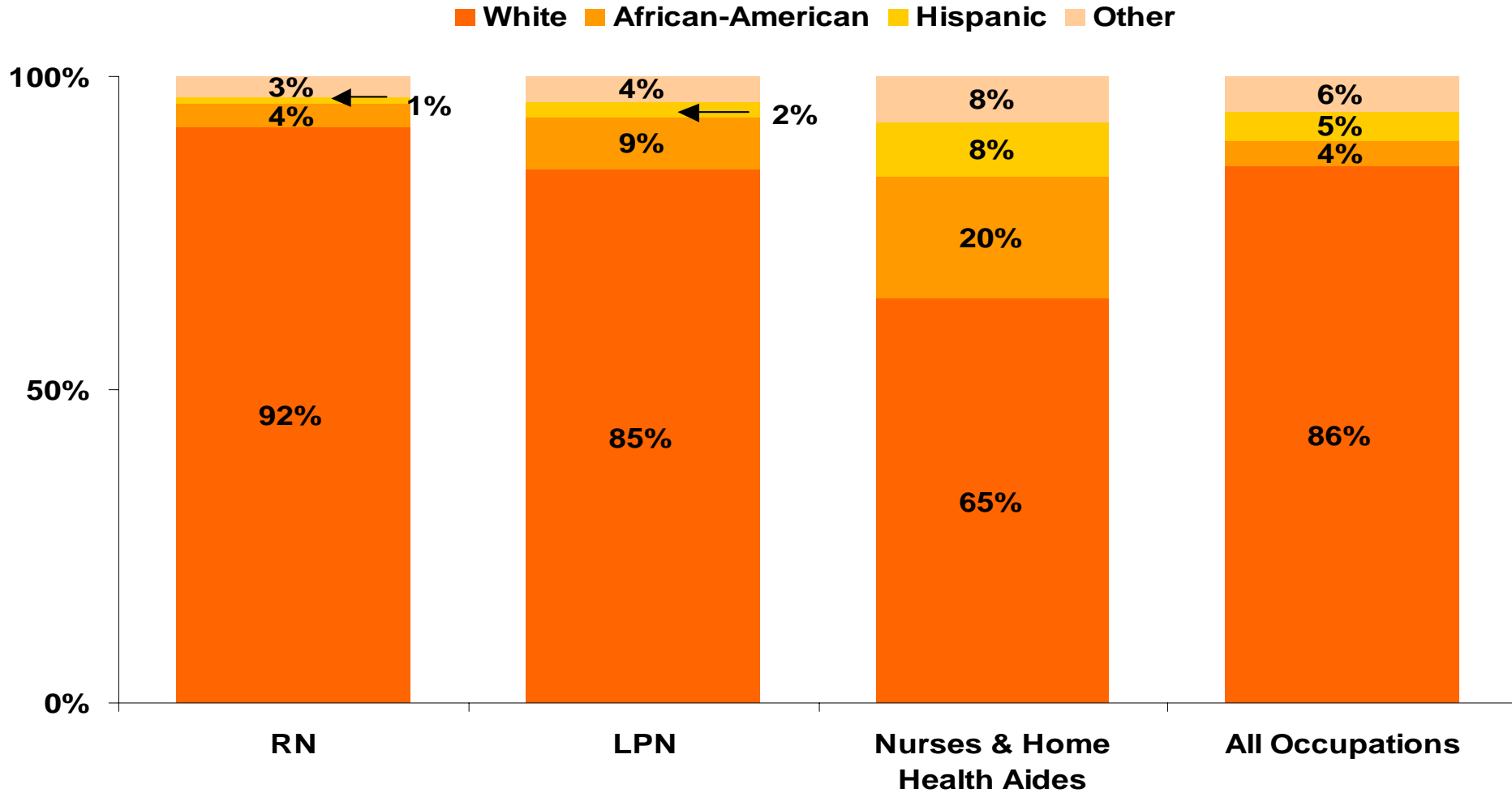
RNs Registered in MA = 103,222



Age of Nursing Professionals & Paraprofessionals



Diversity of Nursing Professionals & Paraprofessionals

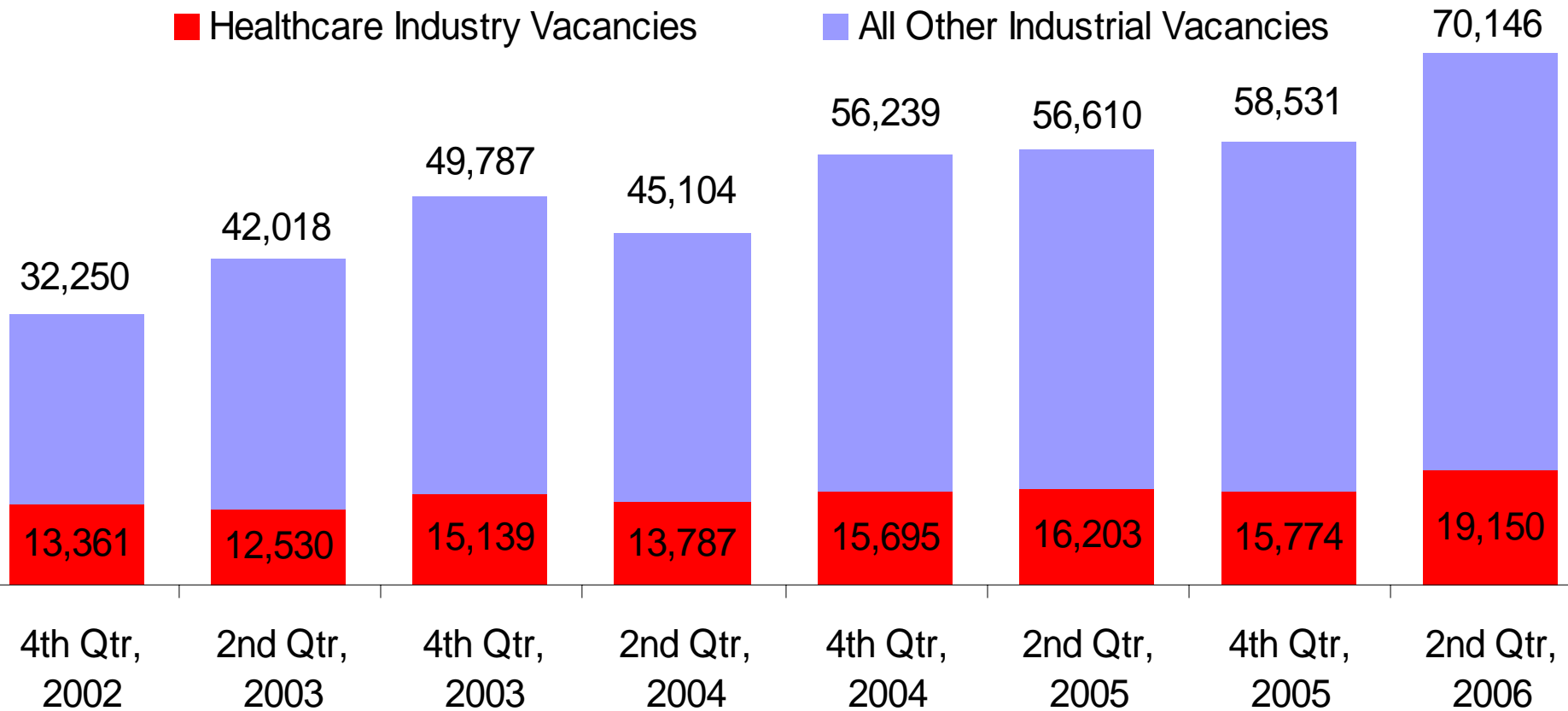


Job Openings Since 2002

Vacancies have increased as the Economy has begun its recovery

■ Healthcare Industry Vacancies

■ All Other Industrial Vacancies



Source: Massachusetts Job Vacancy Survey, 2nd Quarter 2006,

Department of Workforce Development

Source 2: LAUS, DWD

Critical Healthcare Occupations

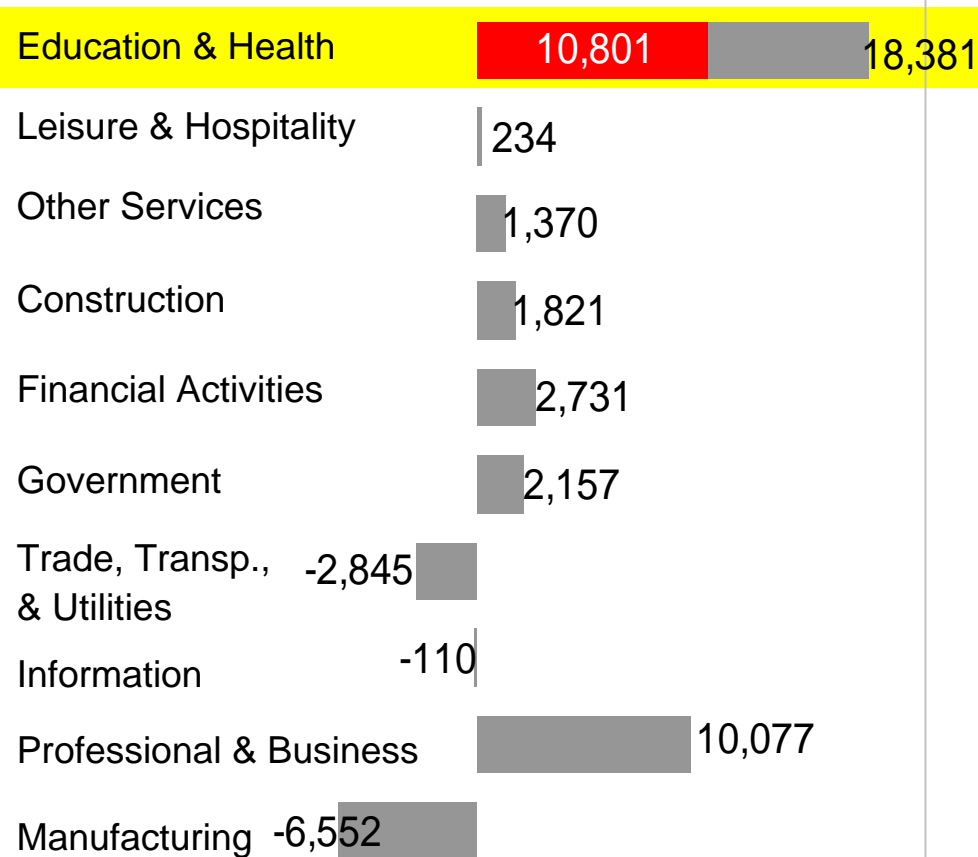
Occupations	Vacancies	2005 Degree/Certificates Granted
Registered Nurses	4,581	2,689
Physical Therapists	381	521
Respiratory Therapists	210	58
Veterinarians	70	79
Medical and Clinical Laboratory Technologists	314	18
Medical and Clinical Laboratory Technicians	301	19
Diagnostic Medical Sonographers	94	83
Radiologic Technologists and Technicians	244	177
Licensed Practical Nurses	470	664
Nursing Aides, Orderlies, and Attendants	1,994	20
Physical Therapist Assistants	107	39
Physical Therapist Aides	60	
Medical Assistants	292	1949
Veterinary Assistants	97	78

Source: CommCorp analysis of Massachusetts Job Vacancy Survey data

Source 2: Commonwealth Corporation analysis of Integrated Post-Secondary Educational Data Systems (IPEDS) data from the National Center for Educational Statistics.

What Industries are Growing? Where are the Openings?

Employment Change Q2, 2005 – Q2, 2006

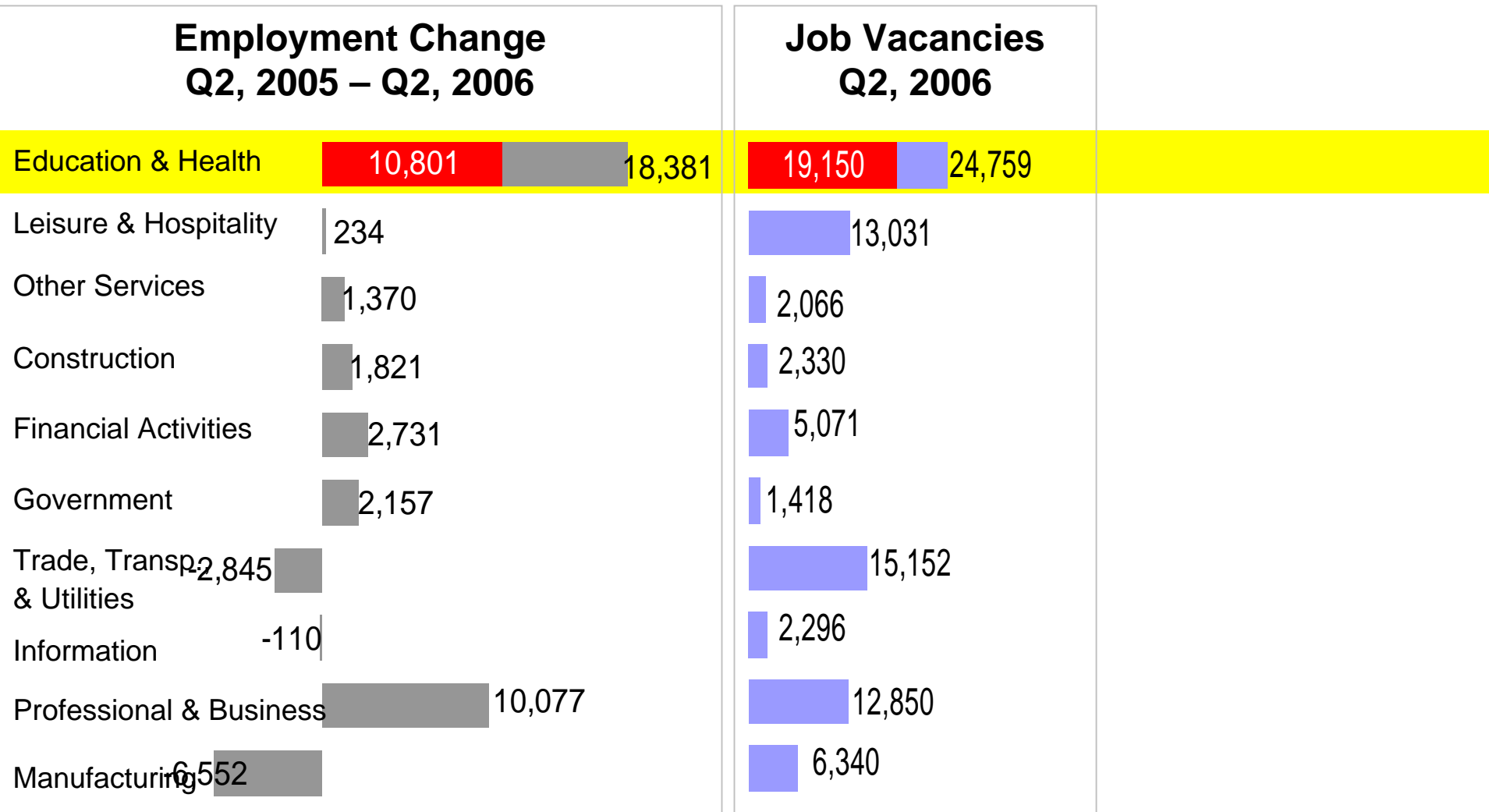


Source: ES-202, Quarterly Data, 2005 & 2006

Source 2: JVS, Q2, 2006

Source 3: MOSES, DWD

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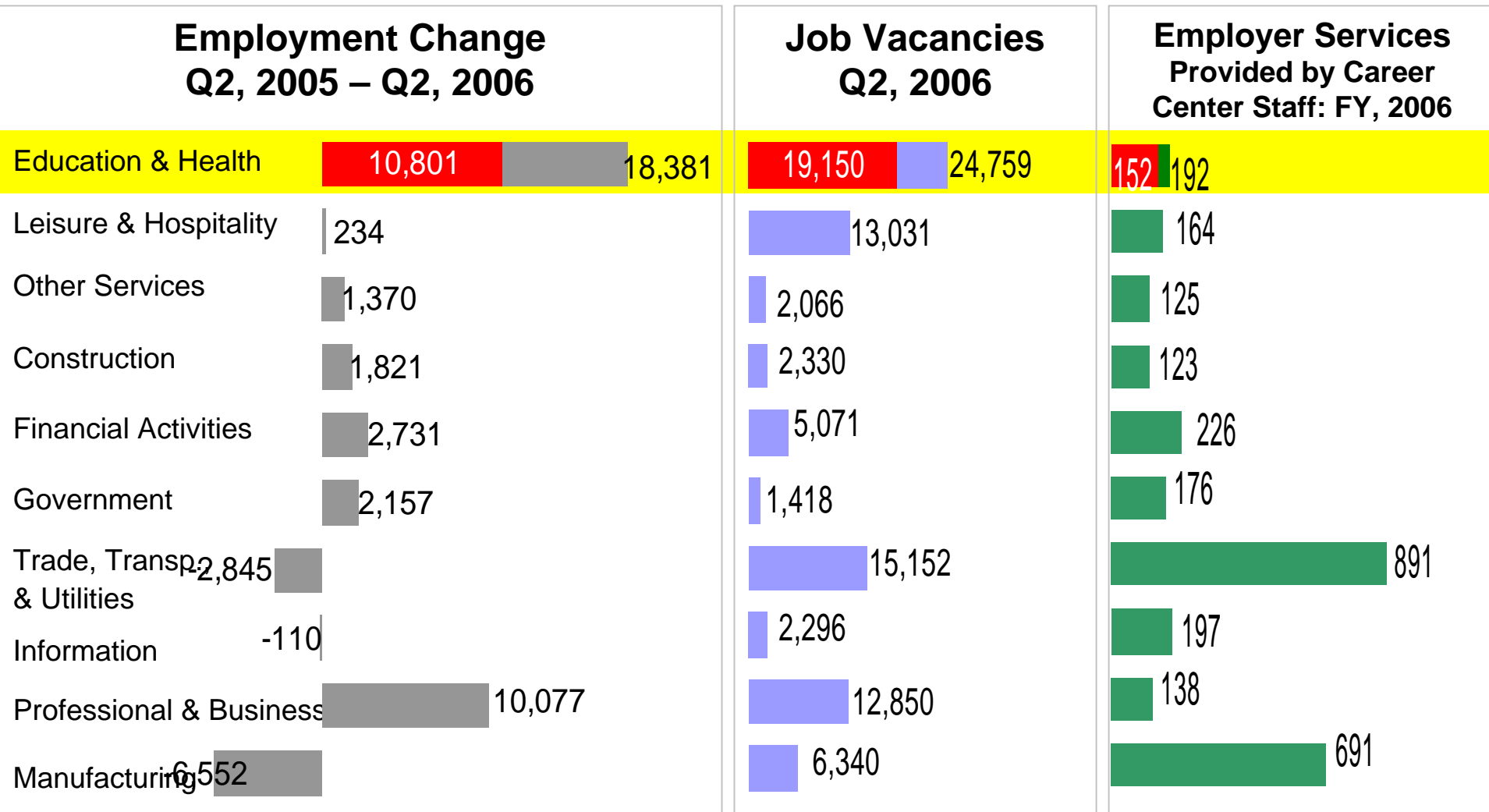


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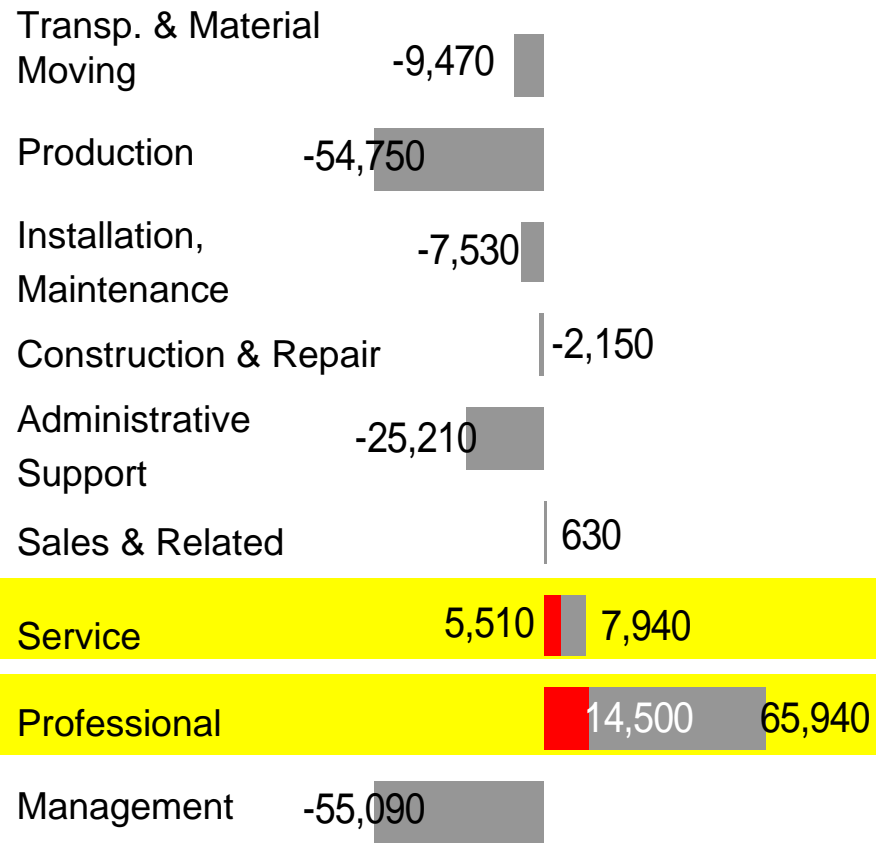
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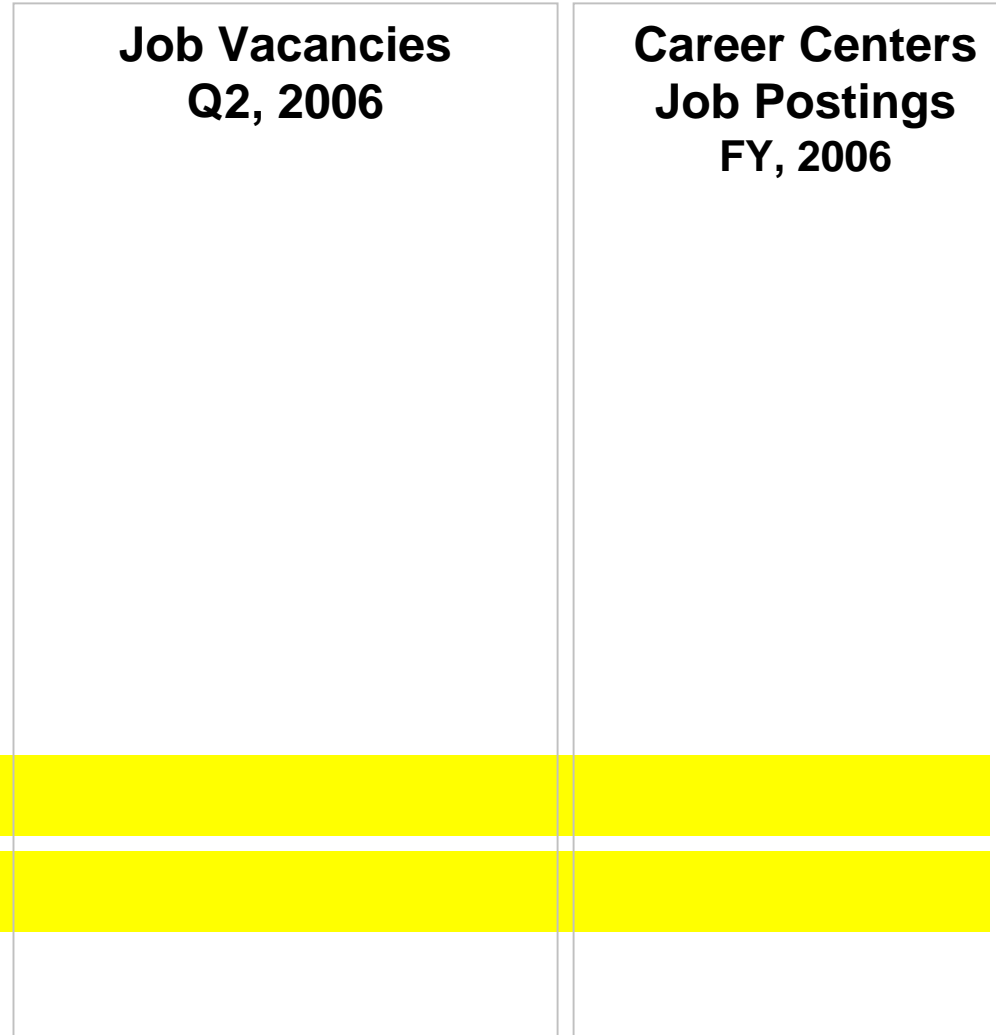
What Occupations are Growing? Where are the Openings?

Employment Trends 2001 - 2006



Job Vacancies Q2, 2006

Career Centers Job Postings FY, 2006



Source: OES, 2001 & 2005

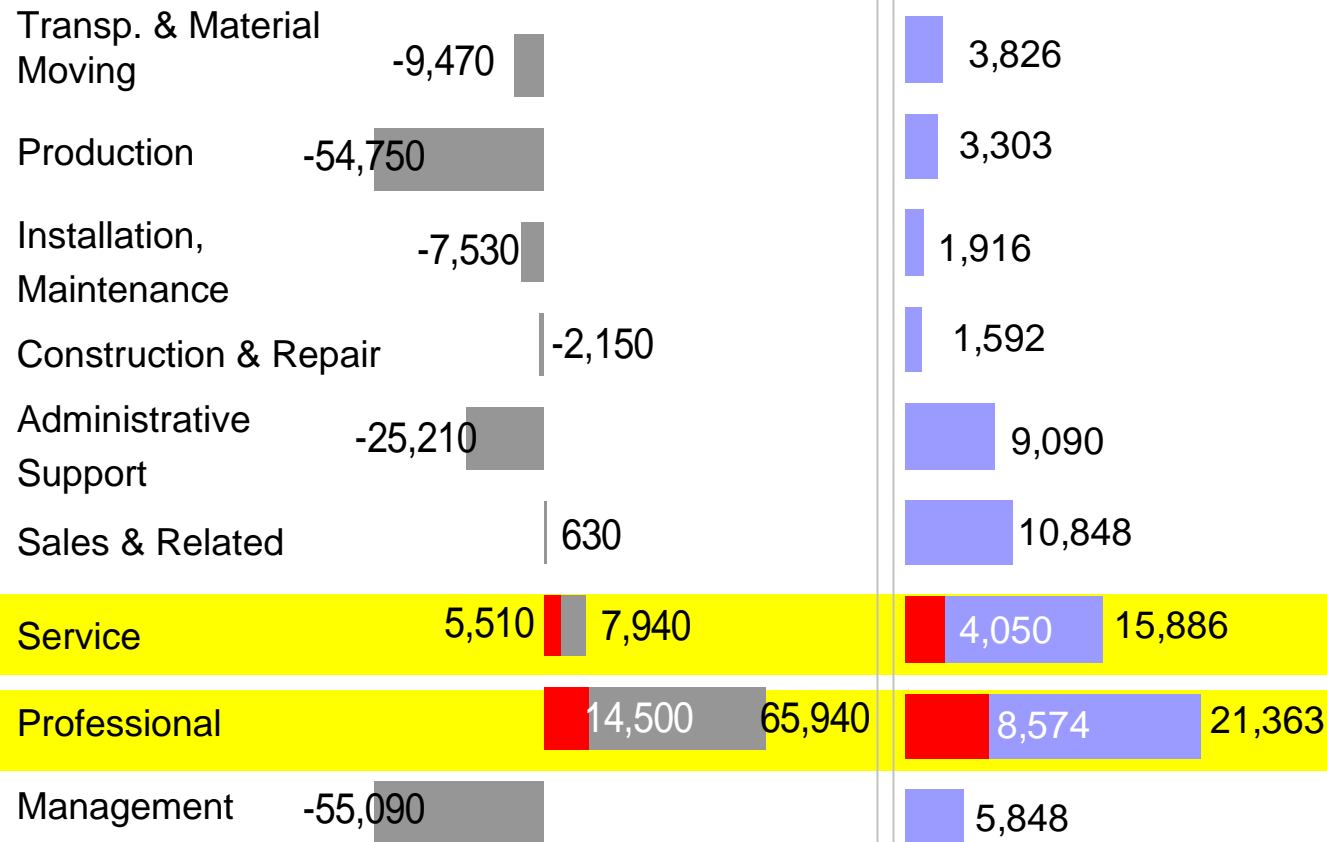
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Employment Trends 2001 - 2006

Job Vacancies Q2, 2006

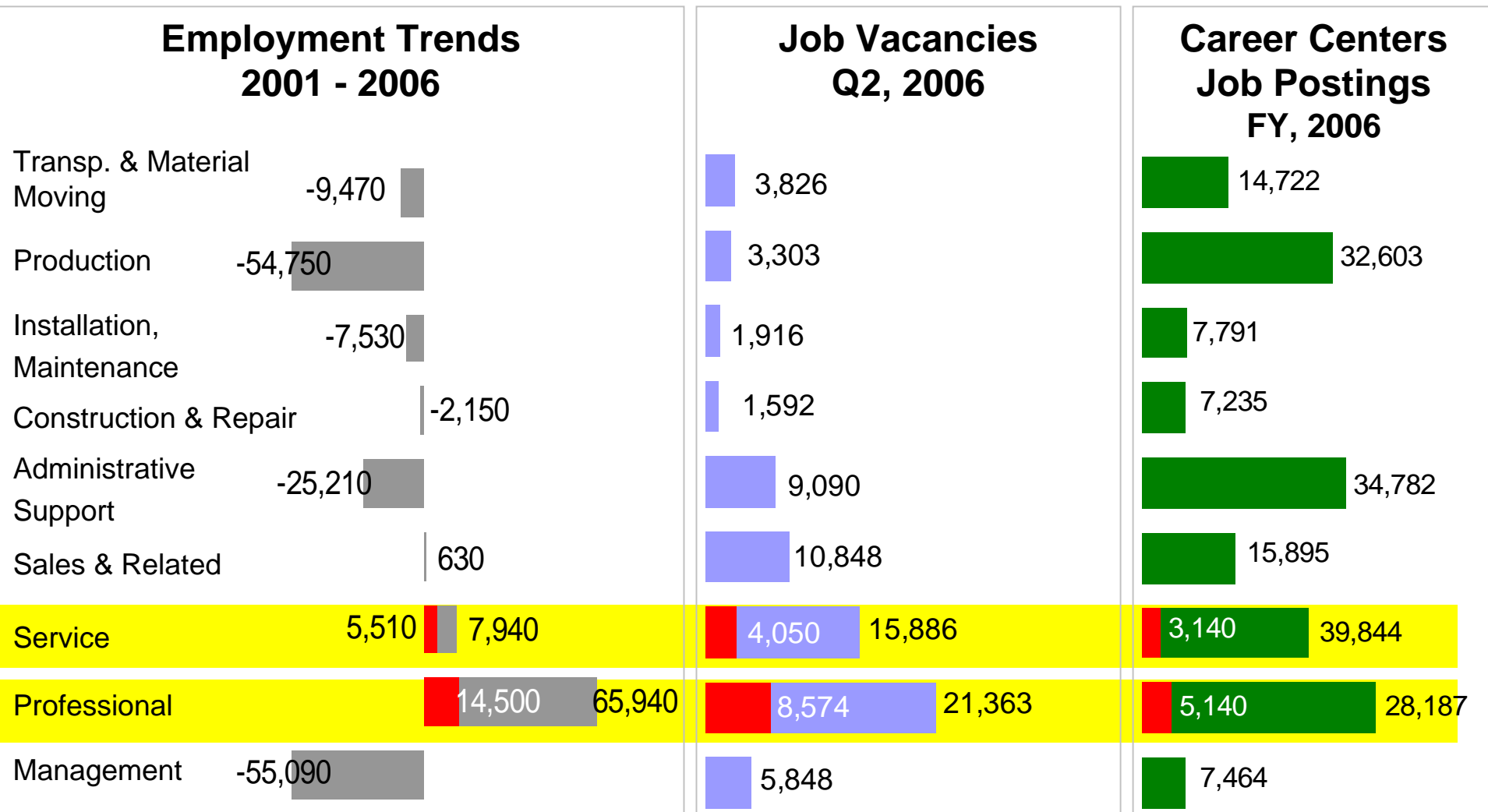


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What Occupations are Growing? Where are the Openings?



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