



Virginia Healthcare Workforce Briefs

Indicators from the Bureau of Labor Statistics'
Current Employment Statistics Survey
Series 2: Regional & Sectoral Employment

Series 2, Issue 5

May 2012

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Data in this report is not seasonally adjusted. HC&SA data includes employees of private firms only. Self-employed persons, including health professionals in private practice, are not included.

Highlights

- ◆ Data in this report is not seasonally adjusted and exhibits short-term volatility from fluctuations in holidays, weekends, weather and other factors.
- ◆ Virginia's large Metropolitan Statistical Areas (MSAs) lost 5,600 Health Care & Social Assistance (HC&SA) jobs in April, affecting each MSA.
- ◆ The Rest of Virginia experienced solid gains in HC&SA jobs, adding 1,300 jobs in April and 3,300 jobs year-to-date.
- ◆ Job losses were highest in the Ambulatory Services sector, which lost 900 jobs in April; however losses were steepest in the Social Assistance sector, which declined at annualized rate of 9.0%.
- ◆ The Richmond MSA's HC&SA sector continued its lackluster performance, having shed jobs or gained no jobs in seven of the past 12 months.

Data in Brief

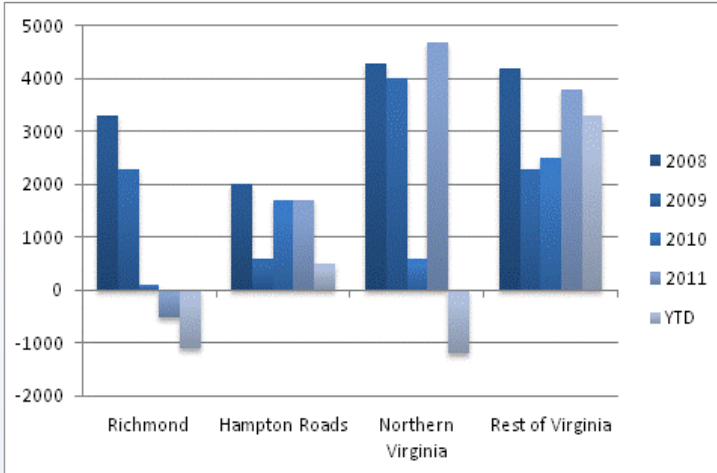
Not Seasonally Adjusted*	Employment, in Thousands				Growth Rate, Annualized		
	Apr 2011	Jan 2012	Mar 2012	Apr 2012	12m Growth	3m growth, annualized	1m growth, annualized
Virginia							
Total Nonfarm	3687.8	3649.2	3694	3717.4 ^P	0.8%	7.7%	7.9%
Health Care & Social Assistance	381.2	386.3	390.9	389.3 ^P	2.1%	3.1%	-4.8%
Virginia Beach, Norfolk, Newport News							
Total nonfarm	738.3	723.4	731.5	738.5 ^P	0.0%	8.6%	12.1%
Health Care & Social Assistance	80.1	80.9	81.5	81.2 ^P	1.4%	1.5%	-4.3%
Northern Virginia							
Total nonfarm	1,326.1	1,328.8	1,337.4	1,343.8 ^P	1.3%	4.6%	5.9%
Health Care & Social Assistance	106.1	106.9	108.5	106.7 ^P	0.6%	-0.7%	-18.2%
Richmond							
Total Nonfarm	611.9	609.3	615.8	617.0 ^P	0.8%	5.2%	2.4%
Health Care & Social Assistance	74.3	73.3	73.2	72.4 ^P	-2.6%	-4.8%	-12.4%
Rest of Virginia							
Total nonfarm	1,011.5	987.7	1,009.3	1,018.1 ^P	0.7%	12.9%	11.0%
Health Care & Social Assistance	120.7	125.2	127.7	129.0 ^P	6.9%	12.7%	12.9%

^P: Preliminary Results

*Seasonally adjusted data is adjusted by the Bureau of Labor Statistics to account for weather and other seasonal changes. Since the US Bureau of Labor Statistics does not provide seasonally adjusted data at this level, this series uses non-seasonally adjusted data exclusively. Seasonal variation may account for some of the variation in time series data. When comparing data in this series to other HWDC series or other publications it is important to note whether the data reported has been seasonally adjusted.

Regional Employment Growth, Level

Figure 1: Annual Change in Employment in Virginia's Health Care & Social Assistance Sector



Employment in Virginia's HC&SA sector have been lackluster so far this year, adding only 1,500 jobs YTD (See HWDC Workforce Briefing Series 1: *State & National Employment* for more robust seasonally-adjusted data). Although declining HC&SA employment is normal in the first couple of months of the year, it usually rebounds by April. The pending Supreme Court decision on the Constitutionality of the Affordable Care Act may be delaying hiring in the sector.

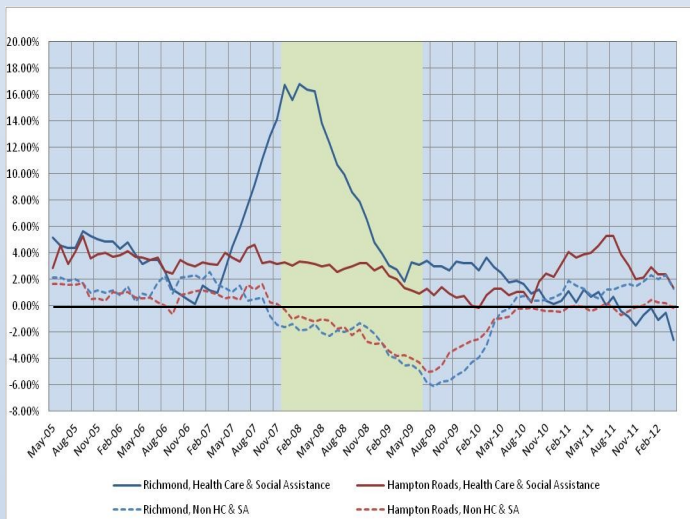
Regardless, HC&SA job stagnation has occurred mainly in Virginia's three largest MSAs. The Rest of Virginia has seen a strong gain of 3,300 jobs YTD, almost matching the growth in this area for the entire year of 2011. Richmond has seen growth in the HC&SA sector steadily erode since a surge in 2007, resulting in virtually no growth in 2010 and net HC&SA job losses in 2011 and YTD 2012.

Year over Year Regional Employment Growth

Virginia's HC&SA sector has been a source of employment strength for all areas of the Commonwealth throughout the recent recession and, with the exception of Richmond, most of the recovery. Richmond experienced a surge of HC&SA sector hiring beginning in fall of 2007 that continued almost into 2009. Hiring began to erode in 2010, and Richmond's HC&SA sector has experienced year-over-year declines since September 2011. Job growth in non-HC&SA sectors returned to more normal levels in early 2010. However, the HC&SA sector remained a relatively strong source of job growth in all areas except Richmond. More recently, as non-HC&SA job growth has stagnated in non-Metro areas of the state in 2011, HC&SA employment has been a strong source of employment.

Figure 2: Year over Year Employment Growth (Not Seasonally Adjusted).

Richmond & Hampton Roads



Northern Va & Rest of Virginia



Regional Share of 12-month Growth

Figure 3: Regional Share of Previous 12-month Growth in the Virginia's HC & SA Sector, Not Seasonally Adjusted.

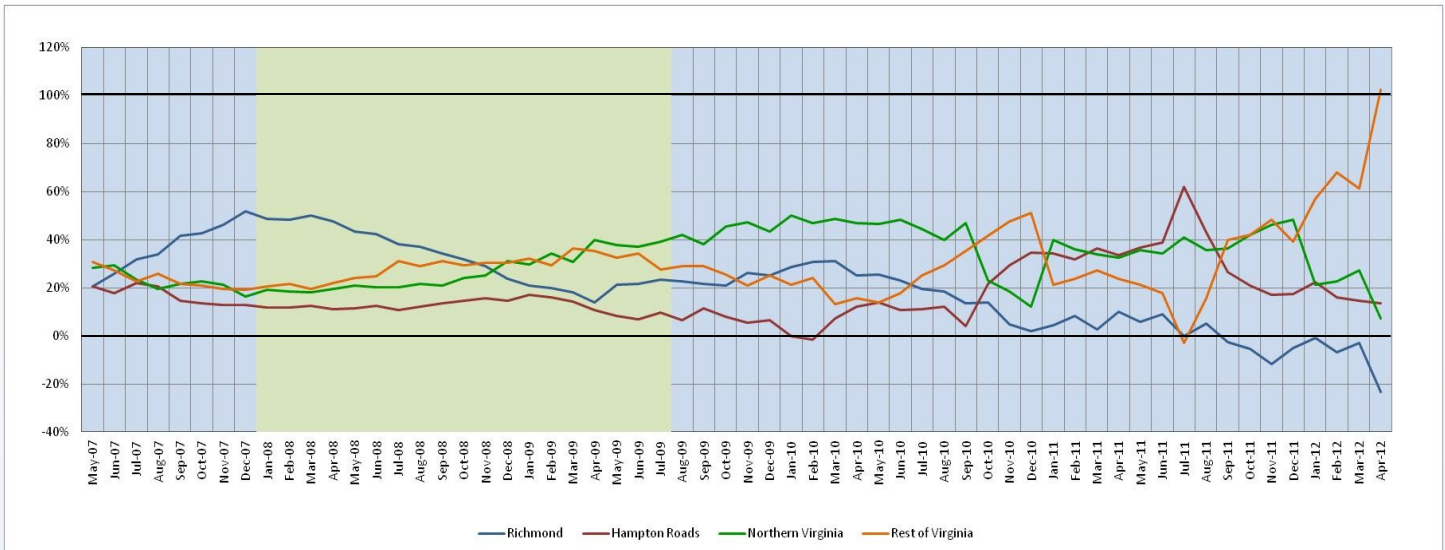
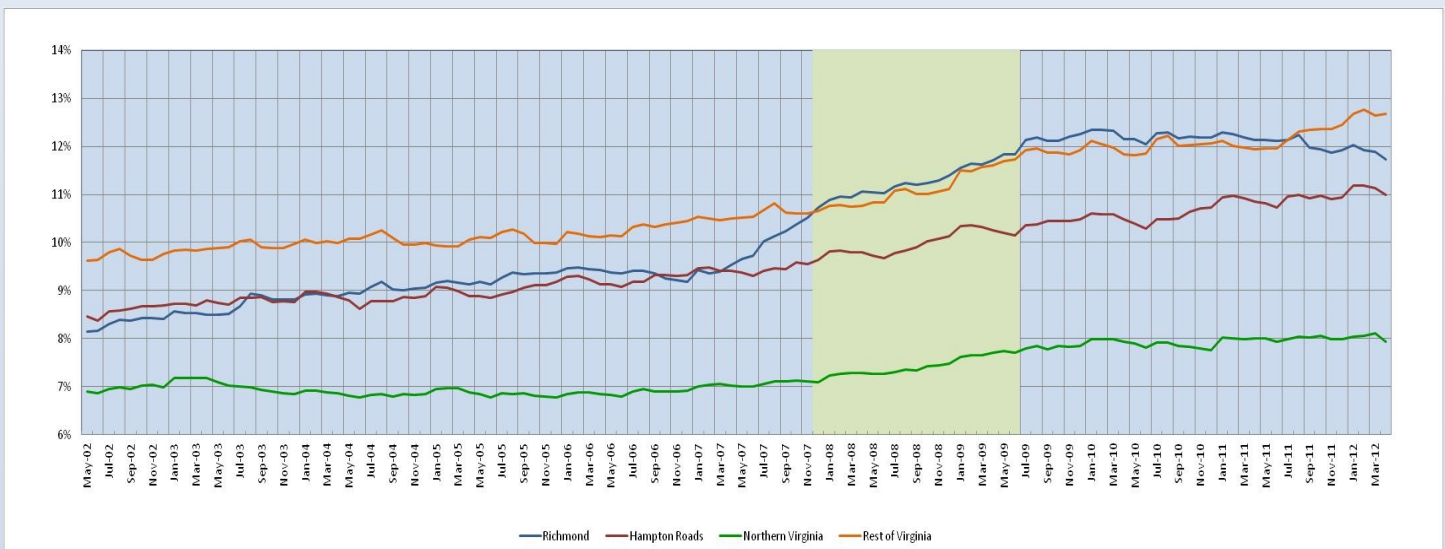


Figure 3 shows the distribution of new HC&SA sector jobs in the Commonwealth, averaged over the previous 12-month period. Results below 0% indicate job losses over the twelve month period, resulting in proportional gains for other areas. The Rest of Virginia (areas outside of Virginia's three largest MSAs) has captured over 102% of Virginia's HC&SA jobs in the past 12 months, gaining 8,300 HC&SA jobs compared to 8,100 jobs for the Commonwealth as a whole. Job losses have come from Richmond, which has lost 1,900 jobs in the prior 12 months, mathematically resulting in the Richmond MSA shifting a 23.5% share of Virginia's HC&SA job growth to other regions.

Share of Employment

Figure 4: The HC & SA Sector's Share of Nonfarm Employment, Not Seasonally Adjusted.



Despite recent job losses in the Richmond MSA, the HC&SA sector remains a prominent employer, accounting for 11.73% of non-farm employment. The HC&SA sector's importance as a local employer grew in all regions through the recent recession, most prominently in the Richmond MSA. The HC&SA sector captures the smallest share (7.41%) of non-farm employment in Northern Virginia. The HC&SA sector captures the largest share (12.67%) of nonfarm employment outside of Virginia's three largest MSAs, overtaking Richmond MSA in July, 2011.

Not Seasonally Adjusted	Employment, in Thousands				Growth Rate, Annualized		
	Apr 2011	Jan 2012	Mar 2012	Apr 2012	12m Growth	3m growth, annualized	1m growth, annualized
Virginia							
Health Care & Social Assistance	381.2	386.3	390.9	389.3 ^p	2.1%	3.1%	-4.8%
Ambulatory Health Care Services	148.1	150.0	151.9	151.0 ^p	2.0%	2.7%	-6.9%
Hospitals	99.4	101.0	101.6	101.5 ^p	2.1%	2.0%	-1.2%
Nursing & Residential Care Facilities	69.3	71.9	73.2	73.1 ^p	5.5%	6.8%	-1.6%
Social Assistance	64.4	63.4	64.2	63.7 ^p	-1.1%	1.9%	-9.0%
Virginia Beach, Norfolk, Newport News							
Health Care & Social Assistance	80.1	80.9	81.5	81.2 ^p	1.4%	1.5%	-4.3%
Hospitals	19.8	20.0	20.1	20.1	1.5%	2.0%	0.0%
Northern Virginia							
Health Care & Social Assistance	106.1	106.9	108.5	106.7 ^p	0.6%	-0.7%	-18.2%
Ambulatory Health Care Services	47.0	47.2	48.9	47.7 ^p	1.5%	4.3%	-25.8%
Hospitals	23.9	23.7	23.8	23.7 ^p	-0.8%	0.0%	-4.9%

Job losses in the HC&SA sector in April were broad-based, affecting all subsectors. Job losses in April were highest in the Ambulatory Health Care Services subsector, which lost 900 jobs in April, an annualized rate of 6.9%. Gains in the 3-month and 12 month periods, however, have been stable. The Social Assistance subsector lost jobs at the highest rate, losing 500 jobs for a 9.0% annualized decline. In the prior 12 months, Virginia's Social Assistance sector has lost 700 jobs, a 1.1% decline over the period. The Nursing & Residential Facilities subsector saw mild job losses in April, despite strong growth in the 3-month (6.8% annualized) and 12-month (5.5% annualized) prior periods. The hospital subsector also experienced mild job losses following stable gains of around 2% annualized in the 3-month and 12-month prior periods.

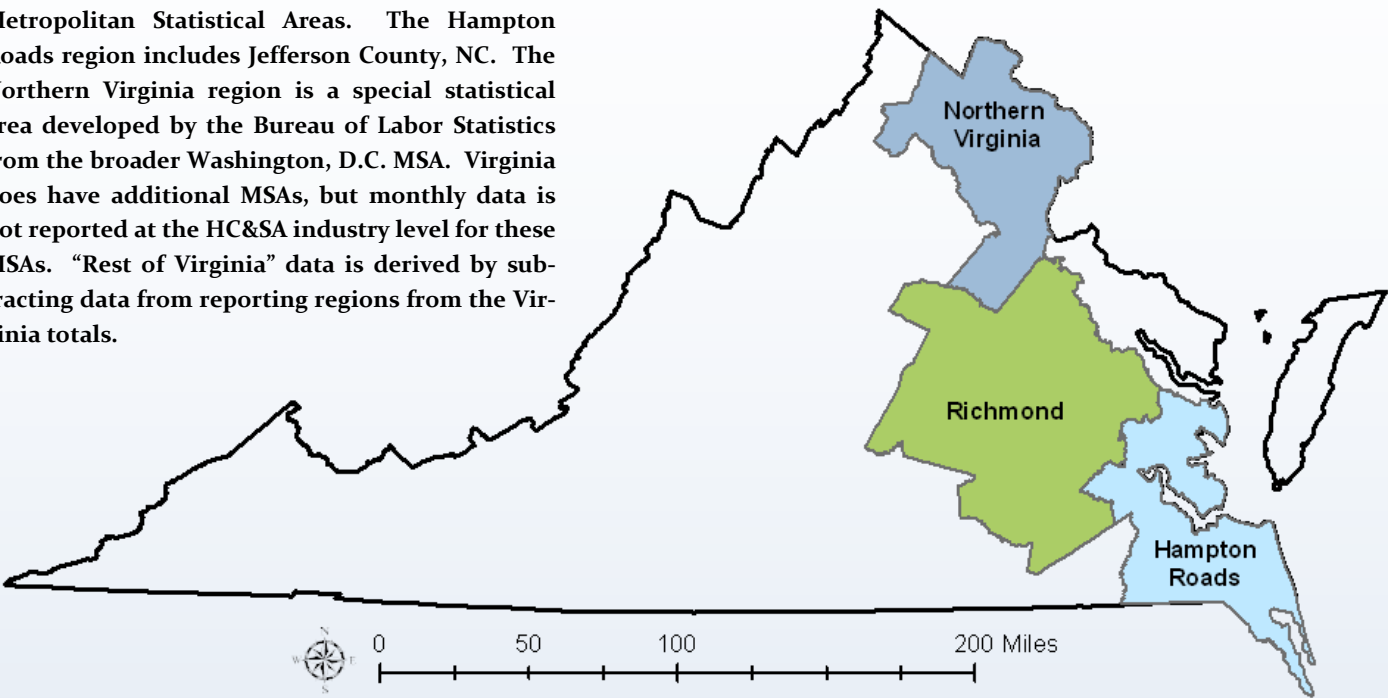
The distribution of jobs across subsectors in Virginia's HC&SA sector has slowly shifted away from Hospitals and Nursing & Residential Facilities to Ambulatory Services and Social Assistance. In the past ten years, Ambulatory Services and Social Assistance gained 2% and 3% of employment share, respectively. Most of the loss of employment share occurred in the Hospital subsector, which lost almost a 4 ½% share of Virginia's HC&SA jobs. Although the Nursing & Residential Facilities subsector lost a one percent share of employment between April 2003 and April 2011, it has gained a ½% share in the prior year.

The chart displays the growth of the health services sector from 2002 to 2012. The Y-axis represents the number of employees in thousands, ranging from 0 to 160. The X-axis represents the years from 2002 to 2012. The four categories are stacked as follows: Social Assistance (bottom, purple), Residential Facilities (second, green), Hospitals (third, red), and Ambulatory Services (top, blue). The percentages shown for each category represent their share of the total workforce in that year.

Year	Social Assistance	Residential Facilities	Hospitals	Ambulatory Services
2002	13.52%	19.19%	30.48%	36.81%
2012	16.36%	18.78%	26.07%	38.79%

Region Map

HWDC *Briefing Series 2* uses Federally designated Metropolitan Statistical Areas. The Hampton Roads region includes Jefferson County, NC. The Northern Virginia region is a special statistical area developed by the Bureau of Labor Statistics from the broader Washington, D.C. MSA. Virginia does have additional MSAs, but monthly data is not reported at the HC&SA industry level for these MSAs. “Rest of Virginia” data is derived by subtracting data from reporting regions from the Virginia totals.



Region Detail

Northern Virginia		Richmond		Hampton Roads	
Northern VA, (Non-standard CES Area 94783)		Richmond, VA (MSA 40060)		Virginia Beach-Norfolk-Newport News, VA-NC (MSA 47260)	
Counties:	Cities	Counties:	Cities	Counties:	Cities
Arlington	Alexandria	Amelia	Colonial Heights	Gloucester	Chesapeake
Clarke	Fairfax	Caroline	Hopewell	Isle of Wight	Hampton
Fairfax	Falls Church	Charles City	Petersburg	James City	Newport News
Fauquier	Fredericksburg	Chesterfield	Richmond	Mathews	Norfolk
Loudoun	Manassas	Cumberland		Surry	Poquoson
Prince William	Manassas Park	Dinwiddie		York	Portsmouth
Spotsylvania		Goochland			Suffolk
Stafford		Hanover			Virginia Beach
Warren		Henrico			Williamsburg
		King & Queen			
		King William			
		Louisa			
		New Kent			
		Powhatan			
		Prince George			
		Sussex			

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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 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 data that is not seasonally adjusted. Seasonal variations related to weather, holidays, weekends, seasons and other predictable variations are apparent in the data. Short-term changes may be related to seasonal changes rather than underlying trends. 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.