



Virginia Healthcare Workforce Briefs

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

Series 2, Issue 9

September 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 series is not seasonally adjusted and exhibits short-term volatility from fluctuations in holidays, weekends, weather and other seasonal factors. Estimates for the most recent month are preliminary.
- ◆ Based on preliminary estimates, Health Care & Social Assistance (HC&SA) payroll employment in Virginia's largest Metropolitan Statistical Areas (MSAs) increased by 800 jobs when compared to July. Most of this growth came in Richmond, which gained 900 HC&SA jobs. Meanwhile, Hampton Roads gained 100 jobs, while Northern Virginia lost 200 jobs. The rest of Virginia's HC&SA sector remained level in August.
- ◆ July's preliminary estimates were revised upward by 500 jobs in Northern Virginia and by 100 jobs in Hampton Roads, while Richmond saw no change in its estimate for July.
- ◆ Statewide, both Health Care/Social Assistance and Hospitals gained 800 jobs in August. In addition, Nursing/Residential Facilities gained 500 jobs during the month. However, Ambulatory services lost 1,300 jobs.

Data in Brief

Not Seasonally Adjusted*	Employment, in Thousands				Growth Rate, Annualized		
	Aug. 2011	May 2012	July 2012	Aug. 2012	12m Growth	3m growth, annualized	1m growth, annualized
Virginia							
Total nonfarm	3,667.9	3,743.2	3,729.1	3,715.5	1.3%	-2.9%	-4.3%
Health Care & Social Assistance	384.8	391.2	394.4	395.2	2.7%	4.2%	2.5%
Virginia Beach, Norfolk, Newport News							
Total nonfarm	743.9	745.5	754.1	746.1	0.3%	0.3%	-12.0%
Health Care & Social Assistance	81.8	82.4	82.4	82.5	0.9%	0.5%	1.5%
Northern Virginia							
Total nonfarm	1,324.6	1,360.3	1,361.7	1,357.2	2.5%	-0.9%	-3.9%
Health Care & Social Assistance	106.6	108.4	109.8	109.6	2.8%	4.5%	-2.2%
Richmond							
Total Nonfarm	608.2	617.5	618.0	617.2	1.5%	-0.2%	-1.5%
Health Care & Social Assistance	74.4	73.0	73.8	74.7	0.4%	9.6%	15.7%
Rest of Virginia							
Total nonfarm	991.2	1,019.9	995.3	995.0	0.4%	-9.4%	-0.4%
Health Care & Social Assistance	112.0	127.4	128.4	128.4	5.2%	3.2%	0.0%

Preliminary estimates are italicized

*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

Employment in Virginia's HC&SA sector has grown by 7,400 jobs YTD, an annualized rate of 2.88%. This represents nearly twice the growth rate of the national HC&SA sector, which has grown at an annualized rate of 1.47% through August. Both Virginia's and the national health care sector saw overall job growth in August as well as upward revisions in July's preliminary numbers, which helped to boost YTD annualized growth rates.

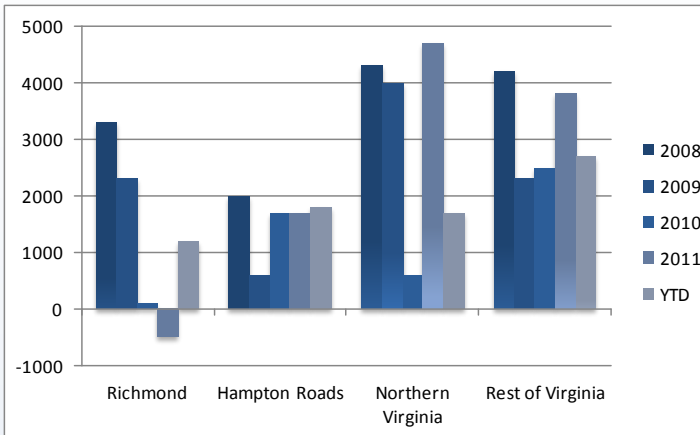


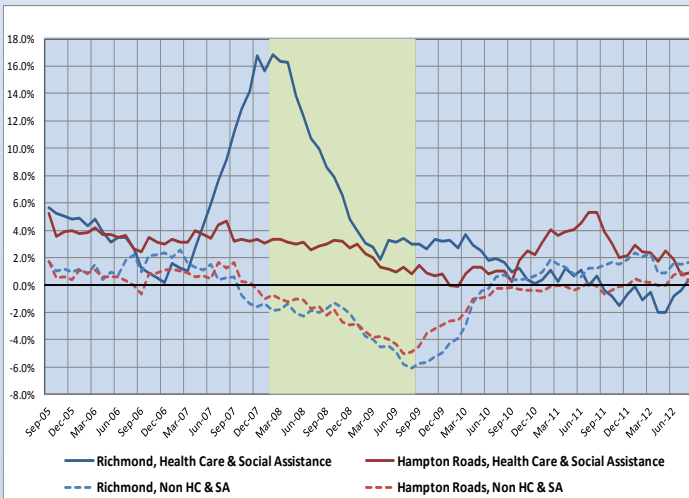
Figure 1: Annual Change in HC&SA Employment (Not Seasonally Adjusted, change from Dec to Dec.)

Year over Year Regional Employment Growth

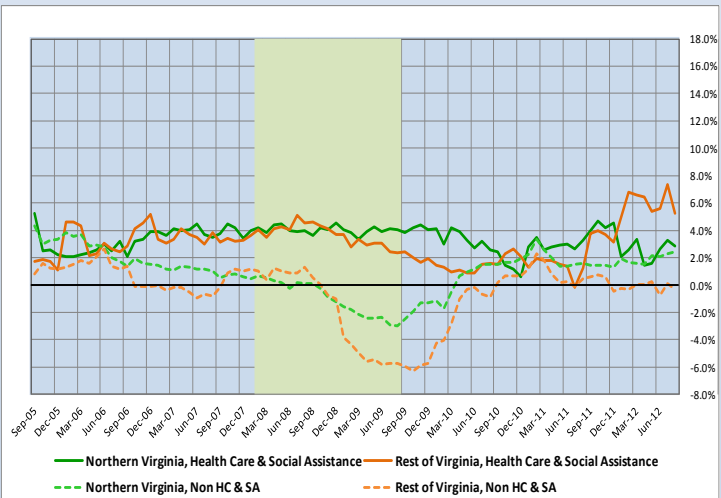
After a temporary one-month reversal, HC&SA YOY employment growth once again exceeded non-HC&SA YOY employment growth in Hampton Roads for the month of August. Nevertheless, YOY growth in Hampton Roads' HC&SA sector was still relatively anemic at just 0.86%. Meanwhile, for the first time in a year, Richmond experienced positive YOY growth in its HC&SA sector. However, the rate was a relatively modest 0.40% and still lags behind employment growth in non-HC&SA sectors by 1.23%. In fact, health care employment growth in Richmond has not exceeded non-health care employment growth since June of 2011. The most significant employment growth in the HC&SA sector remains in Northern Virginia and the Rest of Virginia, but YOY growth rates dipped in both regions in August, particularly in the Rest of Virginia, which saw employment growth fall by 2.11%.

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 Virginia's HC & SA Sector, Not Seasonally Adjusted.

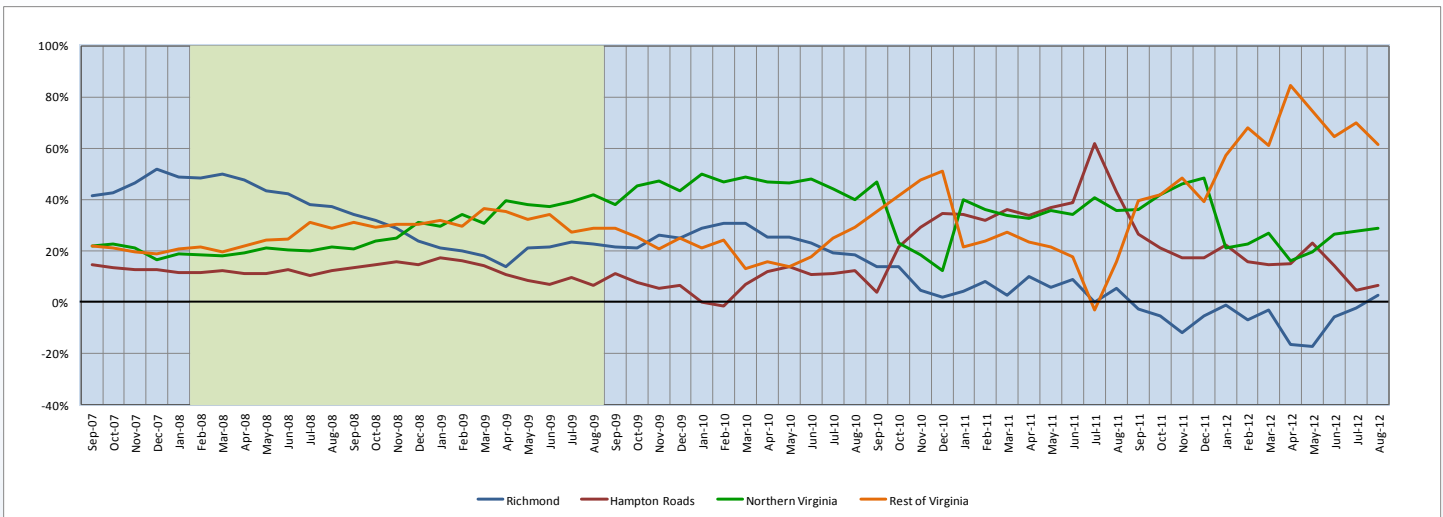
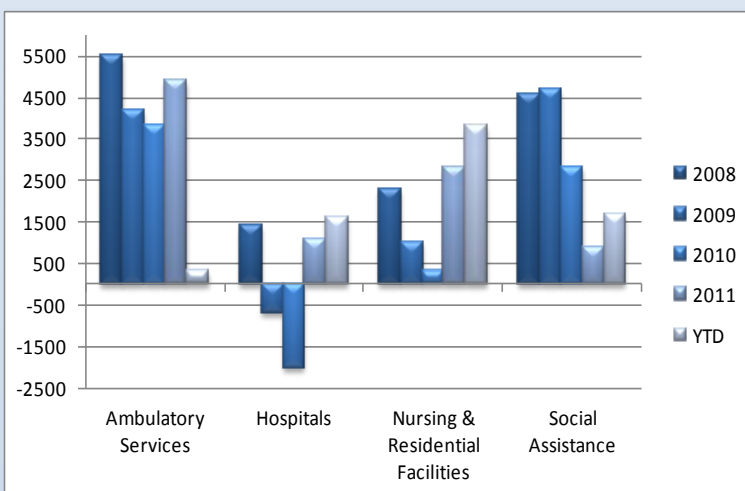


Figure 3 shows the distribution of new HC&SA sector jobs in the Commonwealth over the previous 12-month period. Results below 0% indicate job losses over the twelve month period, resulting in proportional gains for other areas. The majority of HC&SA job growth remains concentrated in the Rest of Virginia (areas outside of Virginia's three largest MSAs), where 61.54% of 12-month HC&SA job growth has currently taken place. However, this represents an 8% drop from the previous month, which continues a declining trend that began in April of 2012. Northern Virginia, Hampton Roads and Richmond all increased their relative shares of 12-month HC&SA job growth in August. This trend was most notable in Richmond, which saw positive 12-month growth for the first time since August of 2011. Richmond saw growth of more than 5%, while Northern Virginia and Hampton Roads also saw gains of 1.07% and 1.97%, respectively.

Subsector Employment Growth, Level

Figure 4: Annual Change in HC&SA Subsector Employment (Not Seasonally Adjusted, change from Dec to Dec.)



So far in 2012, Virginia's HC&SA sector has grown by 7,400 jobs; however, much of this growth has been concentrated in the Nursing & Residential Facilities subsector, which has accounted for 3,800 of those jobs during the year. If this growth continues, the sector will experience the strongest yearly growth in the past five years. Meanwhile, the Hospitals and Social Assistance subsectors have also shown healthy growth in 2012, accounting for 1,600 and 1,700 jobs, respectively. These numbers were boosted by healthy employment gains in August of 800 jobs for both subsectors. The weak spot in Virginia's health care sector continues to be Ambulatory Services, which lost 1,300 jobs in August and has only grown by 300 jobs in all of 2012. This is in marked contrast to the prior four years, where job growth in the Ambulatory Services subsector never fell below 3,500 jobs.

Distribution of Growth by Subsector

Not Seasonally Adjusted	Employment, in Thousands				Growth Rate, Annualized		
	Aug. 2011	May 2012	July 2012	Aug. 2012	12m Growth	3m growth, annualized	1m growth, annualized
Virginia							
Health Care & Social Assistance	384.8	391.2	394.4	395.2	2.7%	4.2%	2.5%
<i>Ambulatory Health Care Services</i>	149.7	153.0	153.2	151.9	1.5%	-2.8%	-9.7%
<i>Hospitals</i>	100.4	101.2	101.8	102.6	2.2%	5.6%	9.8%
<i>Nursing & Residential Care Facilities</i>	71.3	72.8	75.2	75.7	6.2%	16.9%	8.3%
<i>Social Assistance</i>	63.4	64.2	64.2	65.0	2.5%	5.1%	16.0%
Virginia Beach, Norfolk, Newport News							
Health Care & Social Assistance	81.8	82.4	82.4	82.5	0.9%	0.5%	1.5%
<i>Hospitals</i>	20.1	20.1	20.1	20.3	1.0%	4.0%	12.6%
Northern Virginia							
Health Care & Social Assistance	106.6	108.4	109.8	109.6	2.8%	4.5%	-2.2%
<i>Ambulatory Health Care Services</i>	47.8	49.5	49.9	49.2	2.9%	-2.4%	-15.6%
<i>Hospitals</i>	23.8	23.8	24.0	24.0	0.8%	3.4%	0.0%

Preliminary estimates are italicized

Overall, 800 jobs were created in Virginia's HC&SA sector for the month of August, which represents a one-month annualized growth rate of 2.5%. Three of the four health care subsectors contributed positively to this growth: Hospitals, Nursing/Residential Care Facilities and Social Assistance. Each of these subsectors experienced significant one-month annualized growth rates exceeding 8%, and in addition, 12-month annualized growth rates are all above 2% in these subsectors. The laggard in the group was ambulatory health care services, which lost 1,300 jobs in August. Although this represents a one-month annualized drop of nearly 10%, its 12-month annualized growth rate still remains modestly positive.

Share of HC&SA Employment by Subsector

The three-month moving average of year-over-year employment growth was growing at an accelerated rate in three of Virginia's four health care subsectors during the month of August: Social Assistance, Hospitals and Nursing/Residential Care Facilities. The Ambulatory Health Services subsector, however, saw its growth rate decline by a relatively modest 0.47%. With respect to YOY figures, employment growth was most robust in the Social Assistance subsector, which continued to show improvement in August. Year-over-year employment growth has increased to 2.52% in the Social Assistance subsector, an increase of 3.76% from its April low of -1.24%. Nursing/Residential Care Facilities has also experienced robust growth over the past several months, but its YOY growth rate fell to 6.17% in August. Meanwhile, employment growth in the Hospital subsector has increased modestly over the past several months, but Ambulatory Health Services has seen its YOY growth rate fall to 1.47%, its lowest level in more than a decade.

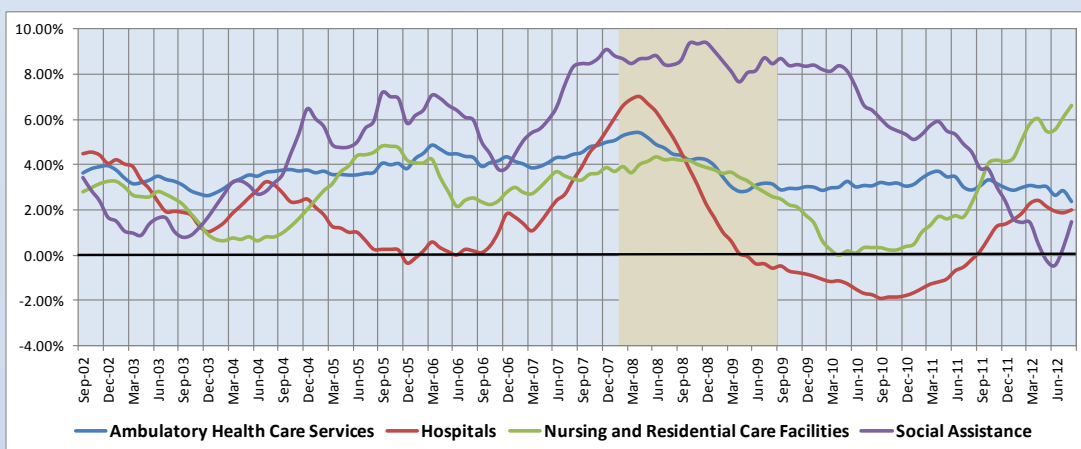
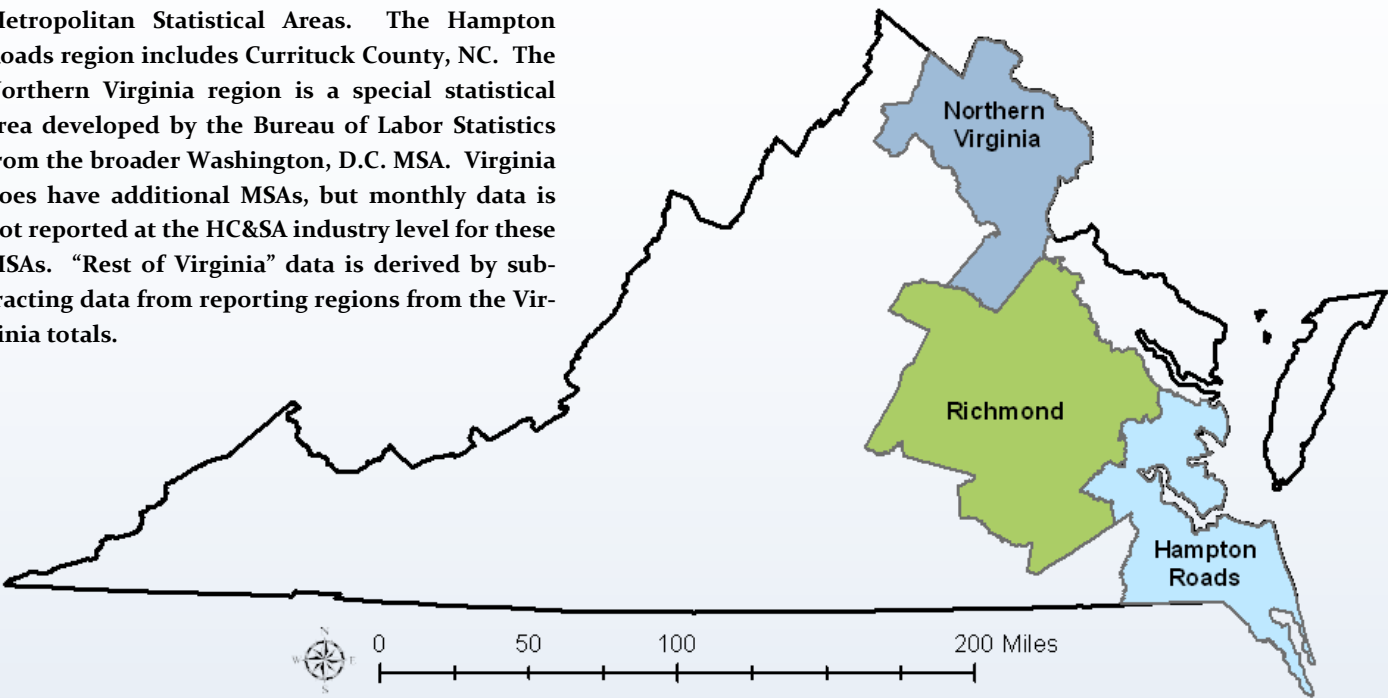


Figure 5: Year-over-year change in employment, 3-month moving average

Region Map

HWDC *Briefing Series 2* uses Federally designated Metropolitan Statistical Areas. The Hampton Roads region includes Currituck 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		Currituck, NC	
		King William			
		Louisa			
		New Kent			
		Powhatan			
		Prince George			
		Sussex			

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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.
- ◆ Government workers in HC&SA level data. (Government workers, regardless of occupation and role, are classified as public sector employees).

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)