



Virginia Healthcare Workforce Briefs

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

Series 2, Issue 20

August 2013

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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.
- ◆ According to preliminary estimates, Virginia's HC&SA sector gained 600 jobs in June. Virginia's HC&SA sector has only gained 400 jobs YTD. However, YOY growth is robust, with 10,600 jobs added since July 2012. Employment in the HC&SA sector reached an unusually high peak in Dec 2012 accounting for the disparity.
- ◆ Similarly, YTD growth in all of Virginia's regions has been anemic and volatile. On a YOY basis, however, growth has been positive in all regions. Richmond and Hampton Roads, in particular, have experienced YOY growth above 4%. Growth has been slower in Northern Virginia, where the HC&SA sector lags the rest of the economy.
- ◆ Subsector employment has experienced similar divergence in YTD & YOY results. YTD, Social Assistance & Nursing & Residential Care Facilities have experienced job losses.
- ◆ Over the past 10 years, HC&SA employment has been increasingly weighted towards Ambulatory Services and Social Assistance and away from Hospitals & Facilities.

Data in Brief

Not Seasonally Adjusted*	Employment, in Thousands				Growth Rate, Annualized		
	July 2012	Apr 2013	June 2013	July 2013	12 Month	3 Month	1 Month
Virginia							
Total Nonfarm	3719.6	3764.5	3796.5	3774.9	1.5%	1.1%	-6.6%
Health Care & Social Assistance	392.8	403.3	402.8	403.4	2.7%	0.1%	1.8%
Virginia Beach, Norfolk, Newport News							
Total Nonfarm	749.1	755.0	768.0	770.1	2.8%	8.2%	3.3%
Health Care & Social Assistance	82.7	85.3	86.7	86.6	4.7%	6.2%	-1.4%
Northern Virginia							
Total Nonfarm	1,354.4	1,368.1	1,389.2	1,380.2	1.9%	3.6%	-7.5%
Health Care & Social Assistance	109.6	111.6	110.5	110.7	1.0%	-3.2%	2.2%
Richmond							
Total Nonfarm	625.2	631.5	635.3	630.5	0.8%	-0.6%	-8.7%
Health Care & Social Assistance	77.9	81.2	81.1	81.2	4.2%	0.0%	1.5%
Rest of Virginia							
Total Nonfarm	990.9	1,009.9	1,004.0	994.1	0.3%	-6.1%	-11.2%
Health Care & Social Assistance	122.6	125.2	124.5	124.9	1.9%	-1.0%	3.9%

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 HC&SA Employment Growth, Level

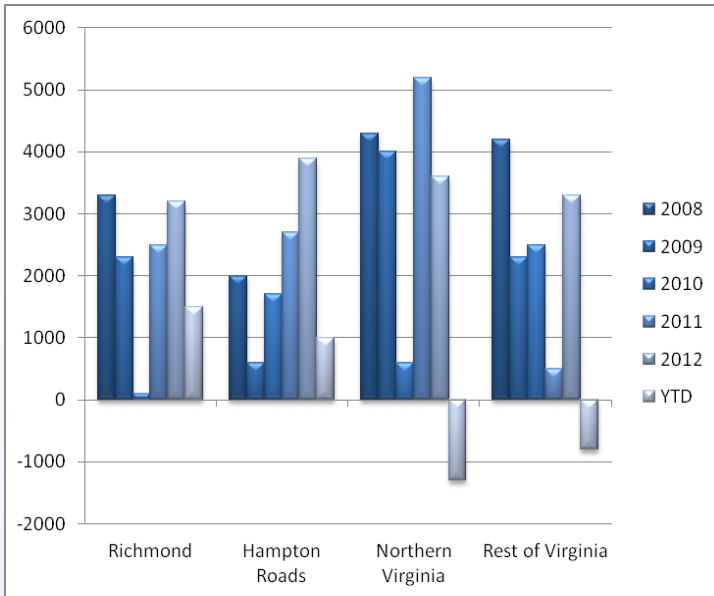


Figure 1: Annual Change in HC&SA Employment (Not Seasonally Adjusted, Change from Dec to Dec).

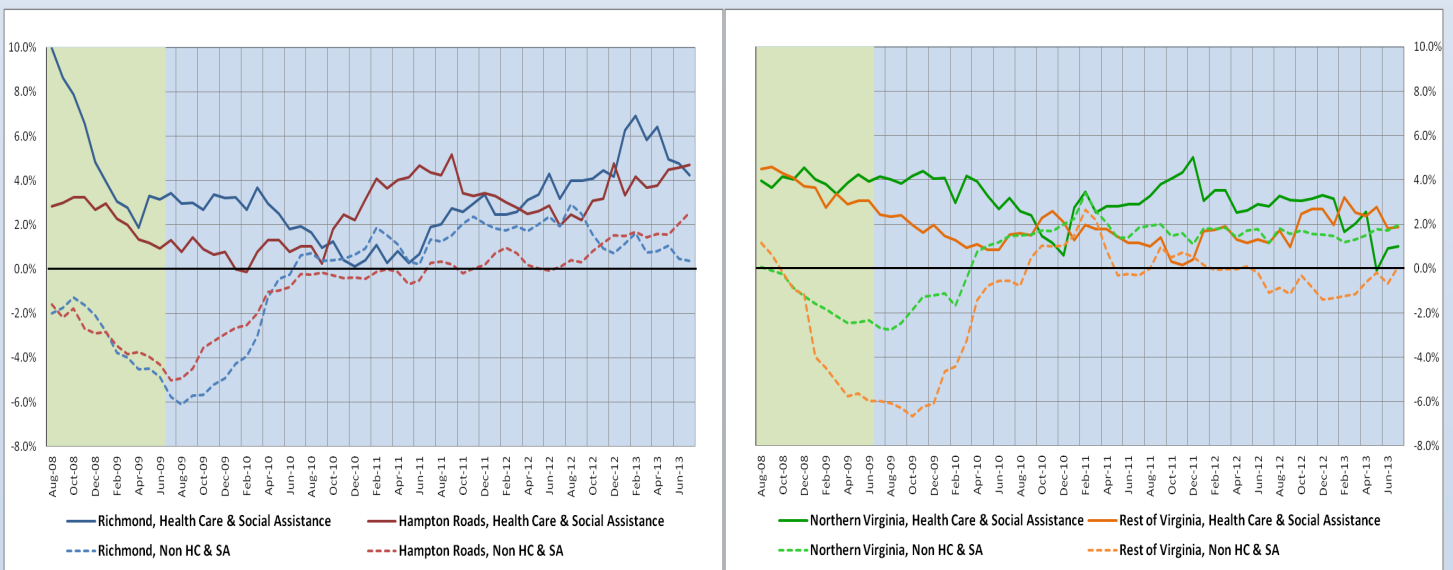
Virginia’s HC&SA sector added 600 jobs in July on a non-seasonally adjusted basis, while June’s preliminary estimate remained unchanged. Thus far in 2013, Virginia’s HC&SA sector has added 400 jobs on a non-seasonally adjusted basis. Although only a little more than halfway through 2013, this is still an extremely low figure for the first seven months of a calendar year. Part of the reason for this is that HC&SA employment peaked in December 2012, with more than 8,000 jobs than existed in September. The sector then lost over half of those gains in January. Nevertheless, HC&SA employment growth has been volatile in 2013 and the sector has struggled to hold onto gains.

Geographically, HC&SA job growth has also been scattered. Hampton roads has added 1,000 jobs in 2013 and Richmond is on pace to match last years high gains. Northern Virginia and the Rest of Virginia, however, have experienced job losses in the HC&SA sectors. In July, the HC&SA sector in Northern Virginia added 200 jobs, 100 jobs in Richmond and 400 in the Rest of Virginia. Hampton Roads lost 100 jobs.

Year-Over-Year Regional Employment Growth

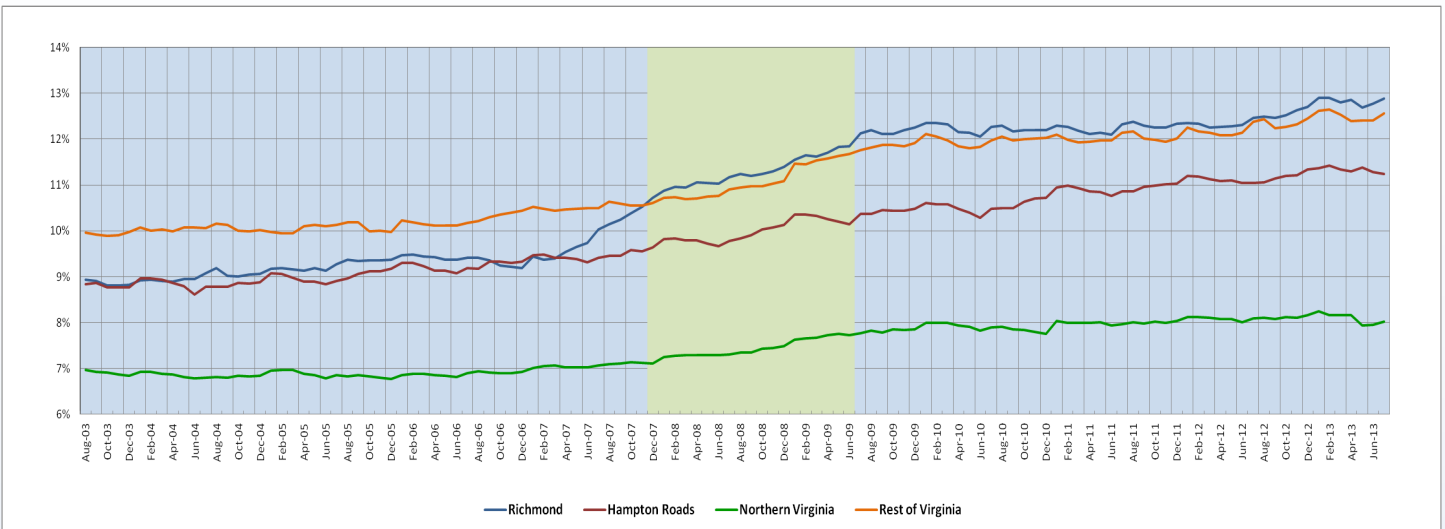
Despite showing only sporadic growth thus far in 2013, Virginia’s HC&SA sector has experienced robust growth year-over-year. Virginia’s HC&SA sector support 10,600 more jobs than it did one year ago, good enough for a 2.7% annualized growth rate. However this is not likely to continue unless the sector repeats the robust growth it experienced last fall, which is not a usual pattern. On a year-over-year basis all regions of Virginia have experienced strong job growth in their HC&SA sectors, but Richmond and Hampton Roads have outperformed other regions with year-over-year growth exceeding 4%. The HC&SA sector is outperforming the rest of the economy in all regions except Northern Virginia, where it lags by a full 100 basis points.

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



Regional Share of 12-month Growth

Figure 3: HC&SA Share of Employment by Region, Not Seasonally Adjusted.

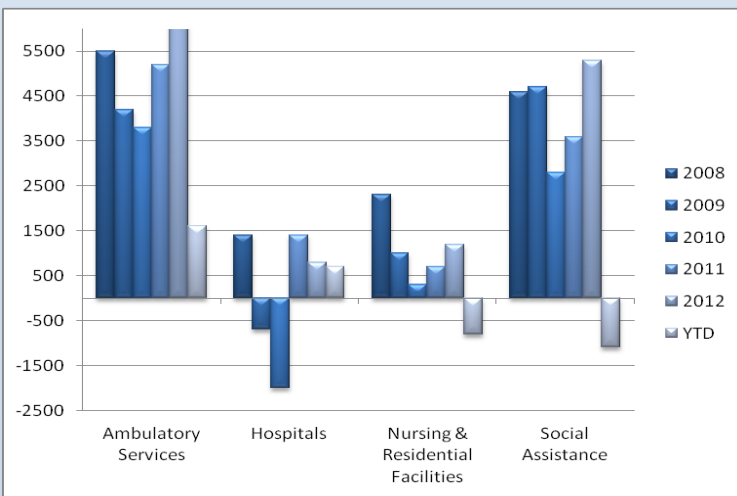


Even with slow and volatile growth in 2013, Virginia’s HC&SA sector has managed to maintain or even increase its importance for employment in all regions of Virginia year-to-date. On a year-over-year basis, only Northern Virginia’s HC&SA sector has seen its share of employment decline, and only by 7 basis points (0.07%). Richmond, Hampton Roads and the Rest of Virginia all saw their shares increase over the same period, by 42, 21 and 19 basis points, respectively. This mirrors the experience of 2001, where the HC&SA sector did not give back employment share following sharp gains through the recession. The HC&SA sector now accounts for more than 12% of jobs in Richmond and the Rest of Virginia, more than 11% in Hampton Roads and more than 8% in Northern Virginia.

Subsector Employment Growth

Three of Virginia’s four HC&SA subsectors, Ambulatory Care, Hospitals and Social Assistance, had positive job growth in July, while employment growth in Nursing & Residential Care Facilities was flat for the month. June’s preliminary estimates for Ambulatory Care and Hospitals were revised downward by 200 and 400 jobs respectively, while estimates for Social Assistance were revised upwards by 600 jobs. Estimates for Nursing & Residential Facilities were unchanged.

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



As with regions, year-to-date job growth has been scattered and volatile in 2013. As of July, Ambulatory Services and Hospitals have experienced net, albeit subdued, job gains, while the other two sectors have experienced declines. Year-over-year growth, however, has been positive for all subsectors. Social Assistance has experienced particularly strong year-over-year growth of 6.2%. Nursing & Residential Facilities, however, have been mostly flat with only 0.57% year-over-year growth.

As with the HC&SA sector overall, the Social Assistance sector was particularly strong last fall. In fact, the Social Assistance sector accounted for more than half of the 8,000 jobs gained between September and December 2012. This accounts for much of the disparity between YTD and YOY results.

Distribution of Growth by Subsector

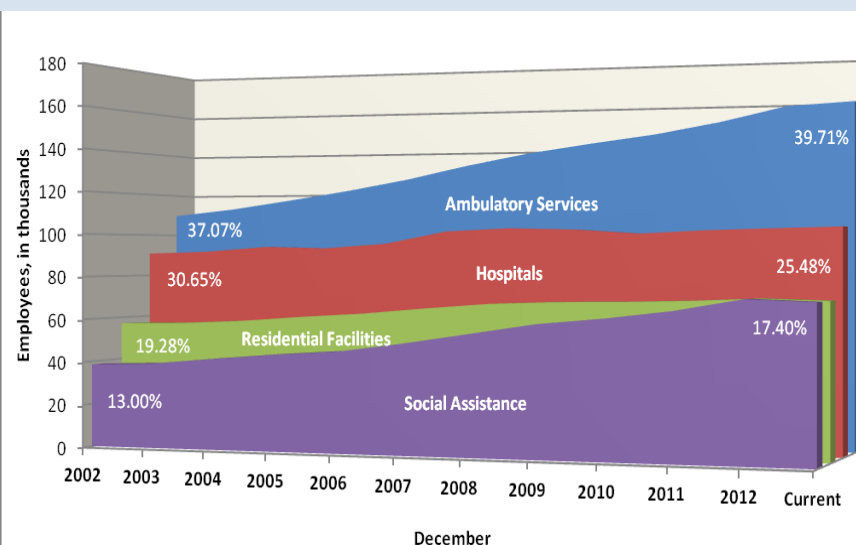
Not Seasonally Adjusted	Employment, in Thousands				Growth Rate, Annualized		
	July 2012	Apr 2013	June 2013	July 2013	12 Month	3 Month	1 Month
Virginia							
Health Care & Social Assistance	392.8	403.3	402.8	403.4	2.7%	0.1%	1.8%
<i>Ambulatory Health Care Services</i>	156.0	159.3	159.3	160.2	2.7%	2.3%	7.0%
<i>Hospitals</i>	100.9	102.1	102.0	102.8	1.9%	2.8%	9.8%
<i>Nursing & Residential Care Facilities</i>	69.8	69.8	70.2	70.2	0.6%	2.3%	0.0%
<i>Social Assistance</i>	66.1	72.1	71.3	70.2	6.2%	-10.1%	-17.0%
Virginia Beach, Norfolk, Newport News							
Health Care & Social Assistance	82.7	85.3	86.7	86.6	4.7%	6.2%	-1.4%
<i>Hospitals</i>	20.3	21.1	21.2	21.3	4.9%	3.8%	5.8%
Northern Virginia							
Health Care & Social Assistance	109.6	111.6	110.5	110.7	1.0%	-3.2%	2.2%
<i>Ambulatory Health Care Services</i>	50.6	50.8	49.6	50.5	-0.2%	-2.3%	24.1%
<i>Hospitals</i>	22.7	23.0	22.6	22.6	-0.4%	-6.8%	0.0%

Preliminary estimates are italicized

Share of 12-Month Growth by Subsector

Statewide, Virginia's HC&SA sector has increased its share of employment by over 2% since 2002. However, this impressive gain only tells part of the story. Share of jobs has been shifting within the HC&SA sector itself. While all subsectors have experienced growing employment over the past 10 years, more of that growth has accrued to Ambulatory Services and Social Assistance than to Hospitals and Nursing & Residential Care Facilities. Since December 2012, Ambulatory Services have added over 50,000 jobs, raising its share of HC&SA employment in Virginia from 37.1% to 39.7%. However, the most impressive growth in share of HC&SA employment has been in Social Assistance. Although the subsector has added less than half of the number of jobs added in Ambulatory Services, its share of HC&SA employment has risen from 13% to 17.4%—a gain in share of almost 34%. Employment-wise, the Social Assistance sector is now the same size as the Nursing & Residential Care Facilities sector, with 70,200 jobs each. Both the Nursing & Residential Care Facilities and Hospital sectors have seen a loss of HC&SA employment share. Hospitals have lost over 5% of the share, declining from 30.7% of

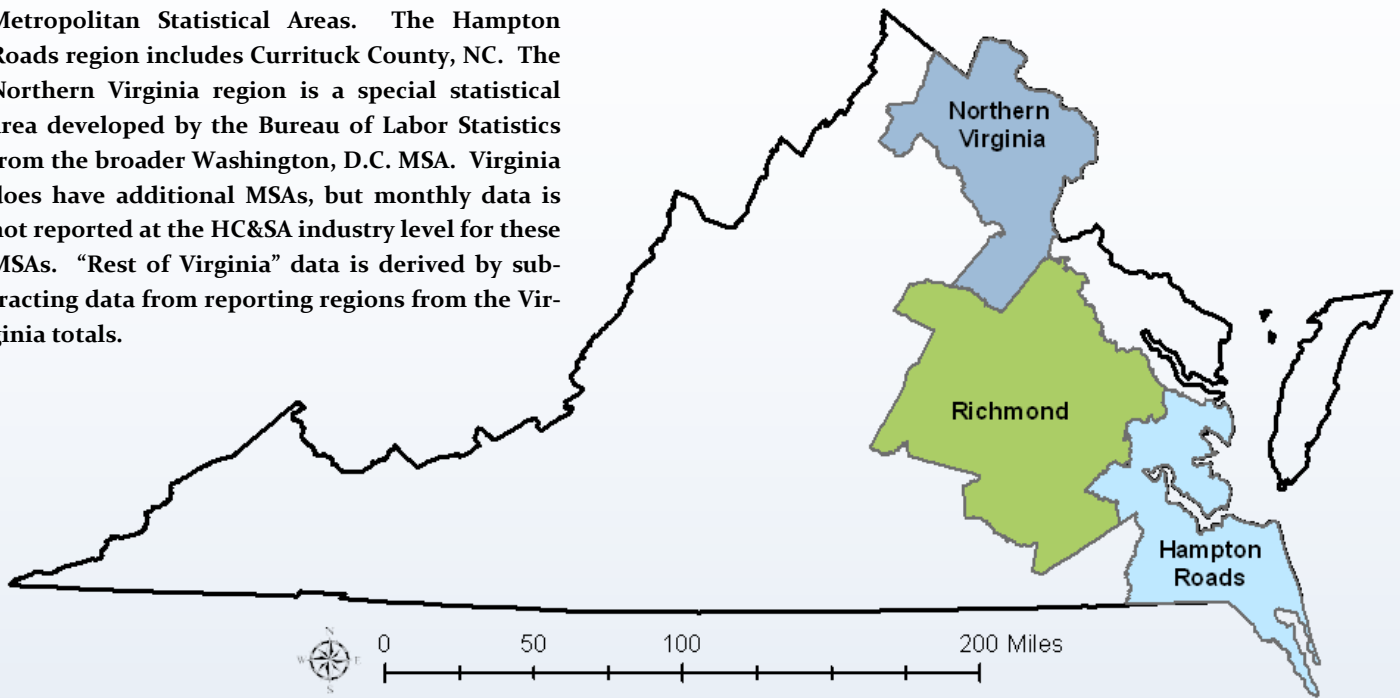
Figure 5: Total Employment by Subsector, 2002-2013 (Not Seasonally Adjusted). HC&SA jobs to only 25.5%.



These changes in employment share may reflect long-term changes in the structure of Virginia's HC&SA sector. For instance, it may reflect a continuing trend away from institutional care in hospitals and other facilities and into community-based and outpatient care. Alternatively, share changes may be short-term, and reflect the increased ease with which large facilities can lower employment, government stimulus spending, safety net spending and/or other short-term effects from the recession and the slow recovery.

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	
<i>Northern VA, (Non-standard CES Area 94783)</i>		<i>Richmond, VA (MSA 40060)</i>		<i>Virginia Beach-Norfolk-Newport News, VA-NC (MSA 47260)</i>	
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		<i>Currituck, NC</i>	Virginia Beach
Warren		Henrico			Williamsburg
		King & Queen			
		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)