



Virginia Healthcare Workforce Briefs

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

Series 2, Issue 23

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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 added 2,900 jobs in November. This represents the strongest month in terms of employment growth in the HC&SA sector so far in 2013.
- ◆ The preliminary estimate for October's HC&SA employment was revised downward by 200 jobs. With this revision, Virginia's HC&SA sector lost 300 jobs in October.
- ◆ Every region of the state added HC&SA jobs in November. Hampton Roads, Northern Virginia and Richmond each added 800 HC&SA jobs, while the Rest of Virginia saw HC&SA employment increase by 500 jobs.
- ◆ Virginia's HC&SA employment growth was driven by job gains in the Ambulatory Health Care Services subsector, which added 1,700 jobs in November. Meanwhile, the Hospitals subsector added 600 jobs, the Social Assistance subsector added 400 jobs, and the Nursing & Residential Care Facilities subsector added 200 jobs.

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.

Data in Brief

Not Seasonally Adjusted*	Employment, in Thousands				Growth Rate, Annualized		
	Nov. 2012	Aug. 2013	Oct. 2013	Nov. 2013	12 Month	3 Month	1 Month
Virginia							
Total Nonfarm	3,772.3	3,771.0	3,788.1	3,797.8	0.7%	2.9%	3.1%
Health Care & Social Assistance	400.6	406.3	407.5	410.4	2.4%	4.1%	8.9%
Virginia Beach, Norfolk, Newport News							
Total Nonfarm	751.0	772.9	759.5	761.4	1.4%	-5.8%	3.0%
Health Care & Social Assistance	84.2	88.1	87.5	88.3	4.9%	0.9%	11.5%
Northern Virginia							
Total Nonfarm	1,372.4	1,371.8	1,374.7	1,382.9	0.8%	3.3%	7.4%
Health Care & Social Assistance	111.3	110.6	109.6	110.4	-0.8%	-0.7%	9.1%
Richmond							
Total Nonfarm	630.4	629.7	636.5	639.8	1.5%	6.6%	6.4%
Health Care & Social Assistance	79.6	82.0	82.3	83.1	4.4%	5.5%	12.3%
Rest of Virginia							
Total Nonfarm	1,018.5	996.6	1,017.4	1,013.7	-0.5%	7.0%	-4.3%
Health Care & Social Assistance	125.5	125.6	128.1	128.6	2.5%	9.9%	4.8%

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

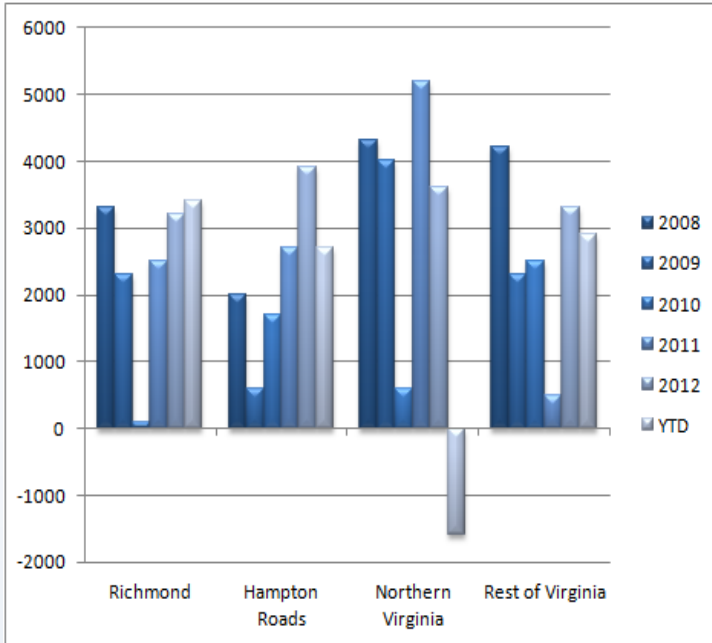


Figure 1: Annual Change in HC&SA Employment (Not Seasonally Adjusted, Change from Dec to Dec).

According to preliminary estimates, Virginia’s HC&SA sector added 2,900 jobs in November. This represents the strongest monthly employment gain for Virginia’s HC&SA sector since October 2012, when 3,600 jobs were added. Year to date, Virginia has added 7,400 statewide HC&SA jobs.

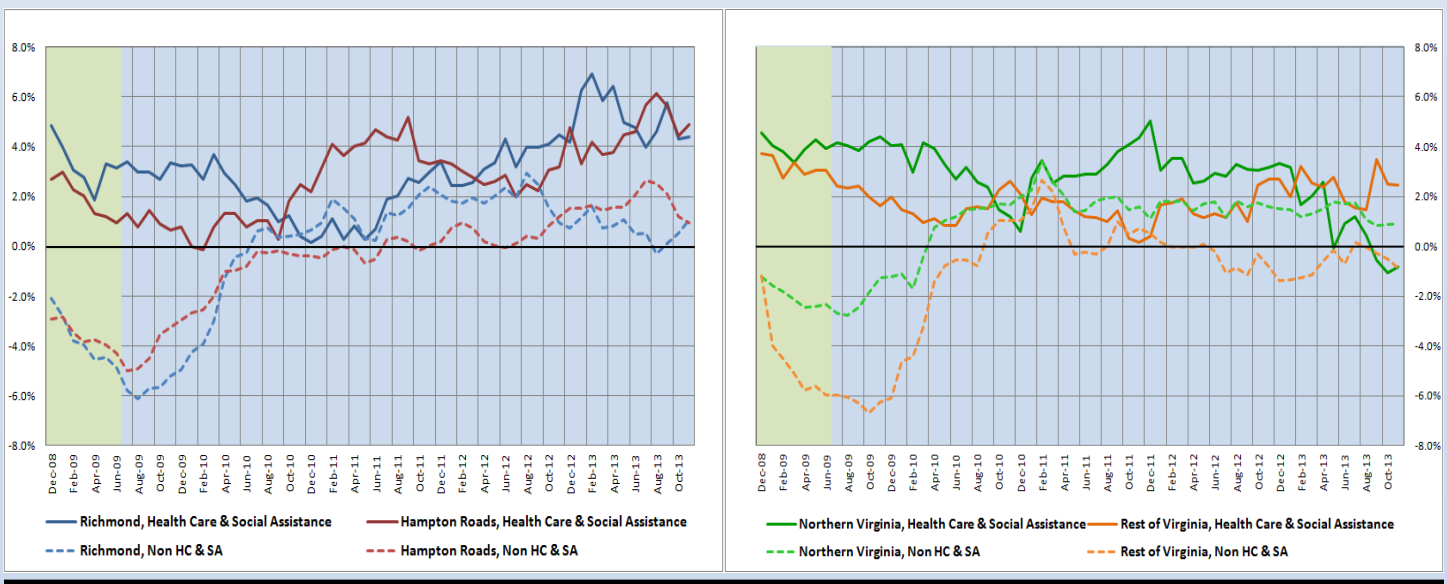
November’s employment gains in Virginia’s HC&SA sector were equally distributed across all the major regions in the state. Hampton Roads, Northern Virginia and Richmond each added 800 HC&SA jobs during the month. Only the Rest of Virginia lagged behind, but even this region added 500 HC&SA jobs in November.

With the year coming to a close, three of Virginia’s four regions are experiencing strong HC&SA employment gains. The growth is most pronounced in Richmond, which has added 3,400 HC&SA jobs year-to-date. If these gains hold next month, Richmond will have experienced its largest annual HC&SA employment increase in more than five years. The one laggard in this group is Northern Virginia, which has shed 1,600 HC&SA jobs so far in 2013.

Year-Over-Year Regional Employment Growth

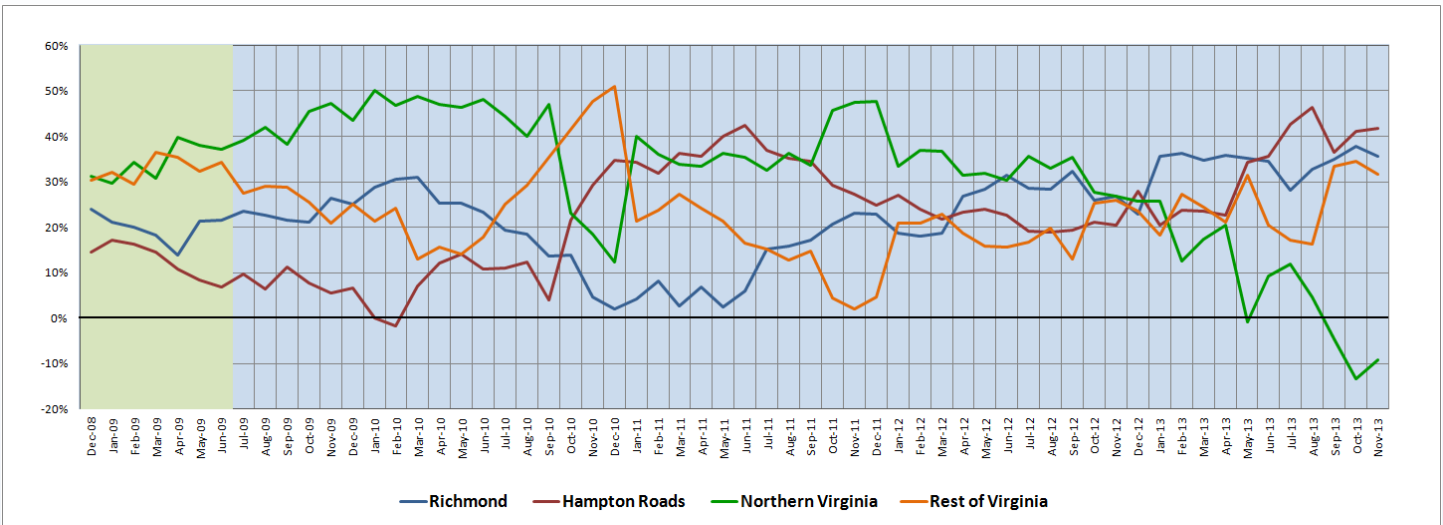
Despite the strong gains in HC&SA employment in November, the different regions of the state did not experience significant changes in their year-over-year HC&SA employment growth rates. Hampton Roads and Richmond, the two regions that have experienced the strongest 12-month growth in 2013, both saw their year-over-year HC&SA employment growth rate increase modestly during the month. Hampton Roads’ growth rate increased from 4.42% to 4.87%, while Richmond’s growth rate increased from 4.31% to 4.40%. The year-over-year employment growth rate also increased in Northern Virginia, but it still remained in negative territory for the third consecutive month.

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



Regional Share of 12-month Growth

Figure 3: Regional Share of Previous 12-Month Employment Growth in Virginia’s HC&SA Sector, Not Seasonally Adjusted.



For the past six months, Hampton Roads has been responsible for the largest share of the previous 12 months of HC&SA employment growth. This trend continued in November, with Hampton Roads increasing its HC&SA employment growth share slightly from 41.1% to 41.84%. Meanwhile, Richmond saw its 12-month HC&SA employment growth share decrease from 37.78% to 35.71%, while the Rest of Virginia saw its employment growth share decrease from 34.44% to 31.63%. Although Northern Virginia did see its 12-month HC&SA employment growth share increase in November, it did little to arrest the long-term decline in the region. Year to date, Northern Virginia’s 12-month HC&SA employment growth share has fallen from 25.76% to -9.18%. Every other region in the state has increased its growth share over this same time period.

Subsector Employment Growth



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

Of the 7,400 jobs that have been created in Virginia’s HC&SA sector in 2013, nearly half have come from the Ambulatory Health Care Services subsector. Year to date, this subsector has added 3,600 jobs. Regardless, the Ambulatory Health Care Services subsector is on pace to produce fewer jobs than in each of the past two years.

The Social Assistance subsector, which is second only to the Ambulatory Health Care Services subsector in the number of year-to-date jobs created, is also on pace to produce fewer jobs in 2013 relative to previous years. So far in 2013, this subsector has added 1,800 jobs, which represents nearly one-quarter of all year-to-date growth in the HC&SA sector.

The other two HC&SA subsectors, Nursing & Residential Care Facilities and Hospitals, have combined to add 2,000 jobs in 2013. Although these two subsectors have seen smaller increases relative to the Ambulatory Services and Social Assistance subsectors, their results compares more favorably to the numbers seen in previous years.

Distribution of Growth by Subsector

Not Seasonally Adjusted	Employment, in Thousands				Growth Rate, Annualized		
	Nov. 2012	Aug. 2013	Oct. 2013	Nov. 2013	12 Month	3 Month	1 Month
Virginia							
Health Care & Social Assistance	400.6	406.3	407.5	410.4	2.4%	4.1%	8.9%
<i>Ambulatory Health Care Services</i>	157.8	162.2	160.5	162.2	2.8%	0.0%	13.5%
<i>Hospitals</i>	102.2	102.5	102.4	103.0	0.8%	2.0%	7.3%
<i>Nursing & Residential Care Facilities</i>	70.0	70.8	71.9	72.1	3.0%	7.5%	3.4%
<i>Social Assistance</i>	70.6	70.8	72.7	73.1	3.5%	13.6%	6.8%
Virginia Beach, Norfolk, Newport News							
Health Care & Social Assistance	84.2	88.1	87.5	88.3	4.9%	0.9%	11.5%
<i>Hospitals</i>	20.7	21.4	21.4	21.6	4.3%	3.8%	11.8%
Northern Virginia							
Health Care & Social Assistance	111.3	110.6	109.6	110.4	-0.8%	-0.7%	9.1%
<i>Ambulatory Health Care Services</i>	50.9	50.9	50.2	50.5	-0.8%	-3.1%	7.4%
<i>Hospitals</i>	23.0	22.4	22.4	22.3	-3.0%	-1.8%	-5.2%

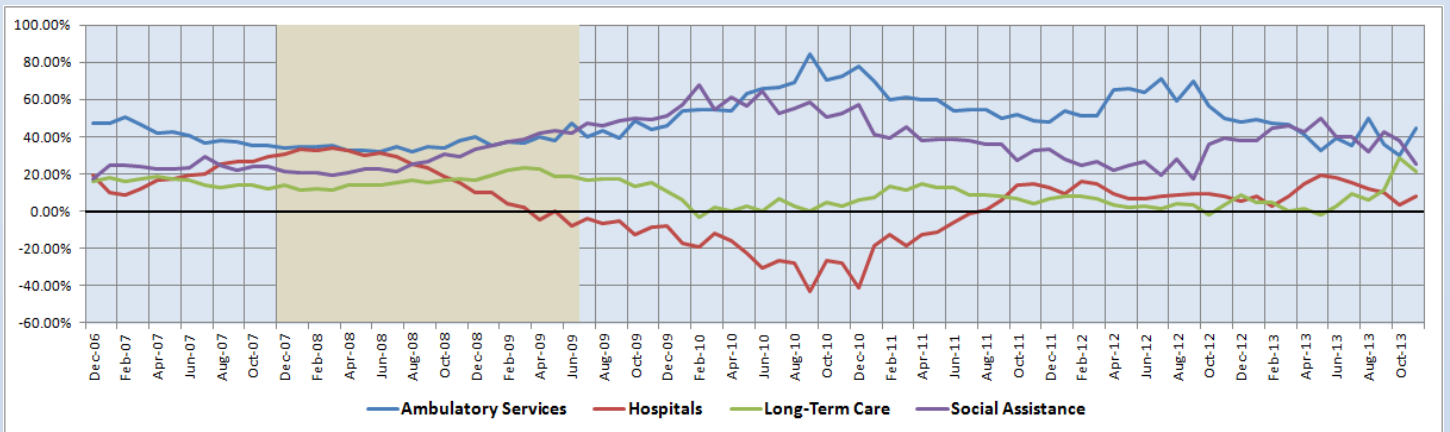
Preliminary estimates are italicized

Virginia's HC&SA sector experienced a very strong month in November, growing at a one-month annualized rate of 8.9%. This represents a significant uptick in employment growth relative to the 12-month annualized rate of 2.4%. Three of Virginia's four HC&SA subsectors have grown at an above-average growth rate over the past 12 months. The fastest of these growers is the Social Assistance subsector, which has grown at a 3.5% year-over-year rate. Only the Hospitals subsector has grown at a below-average rate since last November, although recent growth has been stronger. In addition, the Hospitals subsector has been doing better in certain regions such as Hampton Roads, where 12-month growth is currently 4.3%.

Share of 12-Month Growth by Subsector

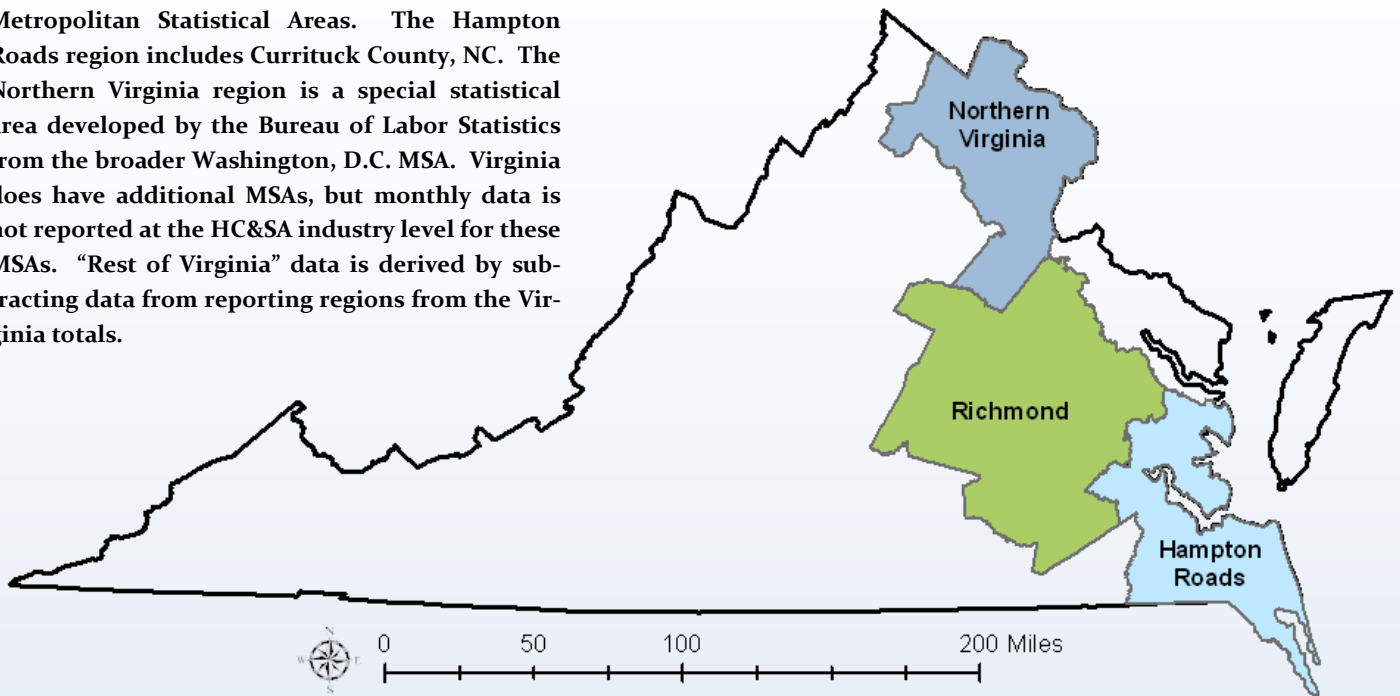
With the addition of 1,700 HC&SA jobs in November, the Ambulatory Health Care Services subsector saw a sharp increase in its 12-month growth share, increasing from 30.00% in October to 44.90% today. This share increase came at the expense of both the Nursing & Residential Care Facilities and Social Assistance subsectors. The Nursing & Residential Care Facilities subsector saw its 12-month growth share decrease by one-quarter from 28.89% to 21.43%, while the Social Assistance subsector saw its share decrease even more precipitously, falling by one-third from 37.78% to 25.51%. This represents the lowest 12-month growth share for the Social Assistance subsector since it fell to just 17.20% in September 2012

Figure 5: Share of Previous 12-Month Growth in Virginia's HC&SA Subsectors (Not Seasonally Adjusted).



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			Virginia Beach
Warren		Henrico		<i>Currituck, NC</i>	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)