



Virginia Healthcare Workforce Briefs

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

Series 2, Issue 13

January 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.
- ◆ Based on preliminary estimates, Virginia's Health Care & Social Assistance (HC&SA) sector produced 1,400 net jobs in December.
- ◆ Northern Virginia was the biggest driver of HC&SA employment growth, producing 1,200 jobs in December. Meanwhile, Hampton Roads produced 400 HC&SA jobs, but Richmond lost 500 HC&SA jobs during the month.
- ◆ Three of Virginia's four HC&SA subsectors saw employment gains in December. Nursing & Residential Care Facilities added 800 jobs, Social Assistance produced 600 jobs and Ambulatory Services contributed 400 jobs. However, Hospitals lost 400 jobs.
- ◆ November's preliminary estimate for HC&SA employment was revised downward by 600 jobs. With this revision, Virginia's HC&SA sector produced 1,800 jobs in the month of November.

Data in Brief

Not Seasonally Adjusted*	Employment, in Thousands				Growth Rate, Annualized		
	Dec. 2011	Sept. 2012	Nov. 2012	Dec. 2012	12 Month	3 Month	1 Month
Virginia							
Total Nonfarm	3,715.4	3,729.1	3,760	3,744.7	0.8%	1.7%	-4.8%
Health Care & Social Assistance	387.8	395.1	400.3	401.7	3.6%	6.9%	4.3%
Virginia Beach, Norfolk, Newport News							
Total Nonfarm	738.2	742.7	747.3	749.1	1.5%	3.5%	2.9%
Health Care & Social Assistance	80.7	82.6	83.7	84.1	4.2%	7.5%	5.9%
Northern Virginia							
Total Nonfarm	1,351.0	1,359.6	1,374.2	1,371.6	1.5%	3.6%	-2.2%
Health Care & Social Assistance	107.9	109.2	110.3	111.5	3.3%	8.7%	13.9
Richmond							
Total Nonfarm	616.2	614.4	617.6	614.7	-0.2%	0.2%	-5.5%
Health Care & Social Assistance	73.5	74.4	75.5	75.0	2.0%	3.3%	-7.7%
Rest of Virginia							
Total Nonfarm	1,010.0	1,012.4	1,020.9	1,009.3	-0.1%	-1.2%	-12.8%
Health Care & Social Assistance	125.7	128.9	130.8	131.1	4.3%	7.0%	2.8%

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 Employment Growth, Level

In December, Virginia's HC&SA sector had another strong month of employment growth, adding 1,400 new jobs. However, these gains were mitigated somewhat by the downward revision of 600 jobs from November's preliminary estimate. Now that December's preliminary results have been released, Virginia's HC&SA sector produced 13,900 jobs in 2012 on a

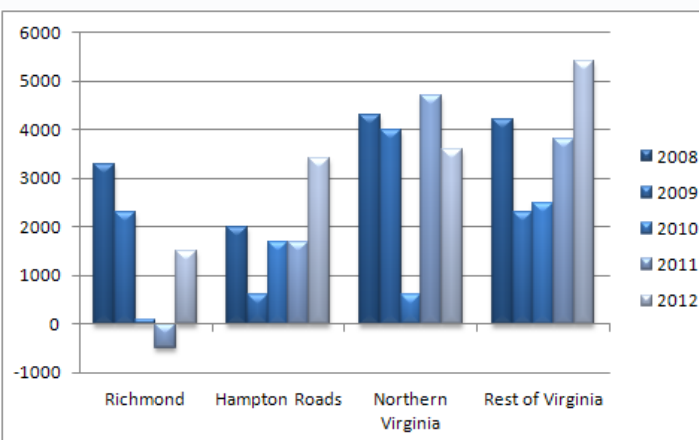


Figure 1: Annual Change in HC&SA Employment (Not Seasonally Adjusted, Change from Dec to Dec.)

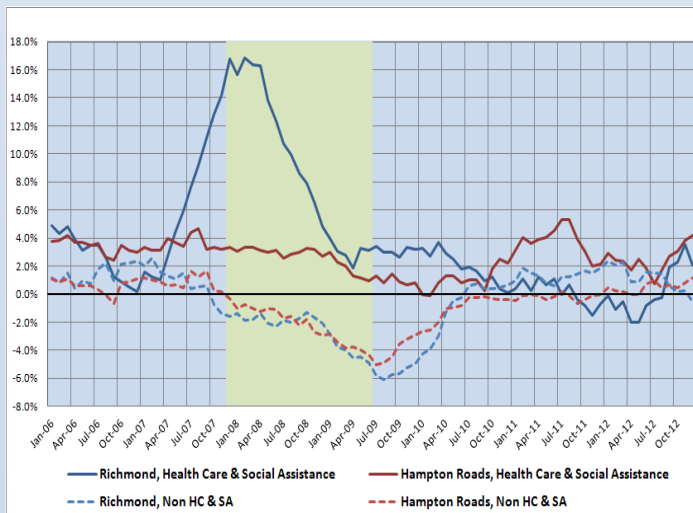
Year over Year Regional Employment Growth

After six months in which Richmond's year-over-year employment growth rate saw an upward swing of more than 5.5%, the region's employment gains were arrested in December. In a month when the entire state produced 1,400 new HC&SA jobs, Richmond lost 500 jobs, which reduced its year-over-year employment growth rate from 3.6% to 2.0%. With this significant decline, Richmond is again the slowest growing region for HC&SA employment in the state.

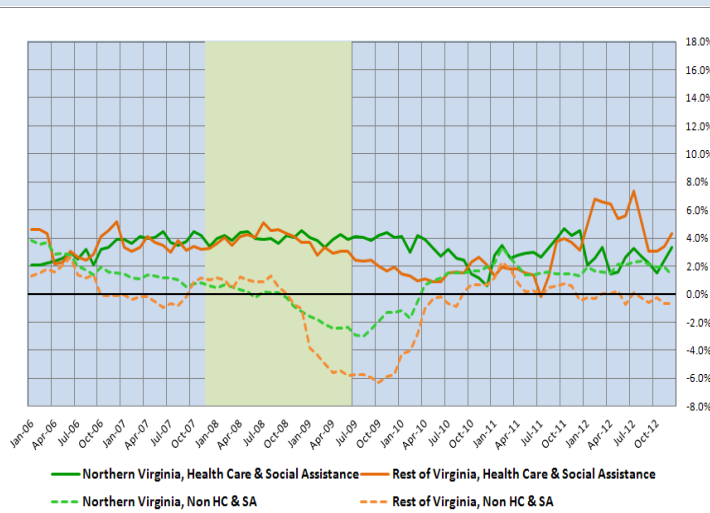
Despite Richmond's relative underperformance in December, the health care sector in the other regions of the state did well during the month. Hampton Roads has continued its recent upsurge and now boasts a year-over-year employment rate of over 4% for the first time since August of 2011. With a growth rate of 3.3%, Northern Virginia experienced its fastest year-over-year growth of the year in December. Meanwhile, the Rest of the State rebounded above 4% during the month.

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.

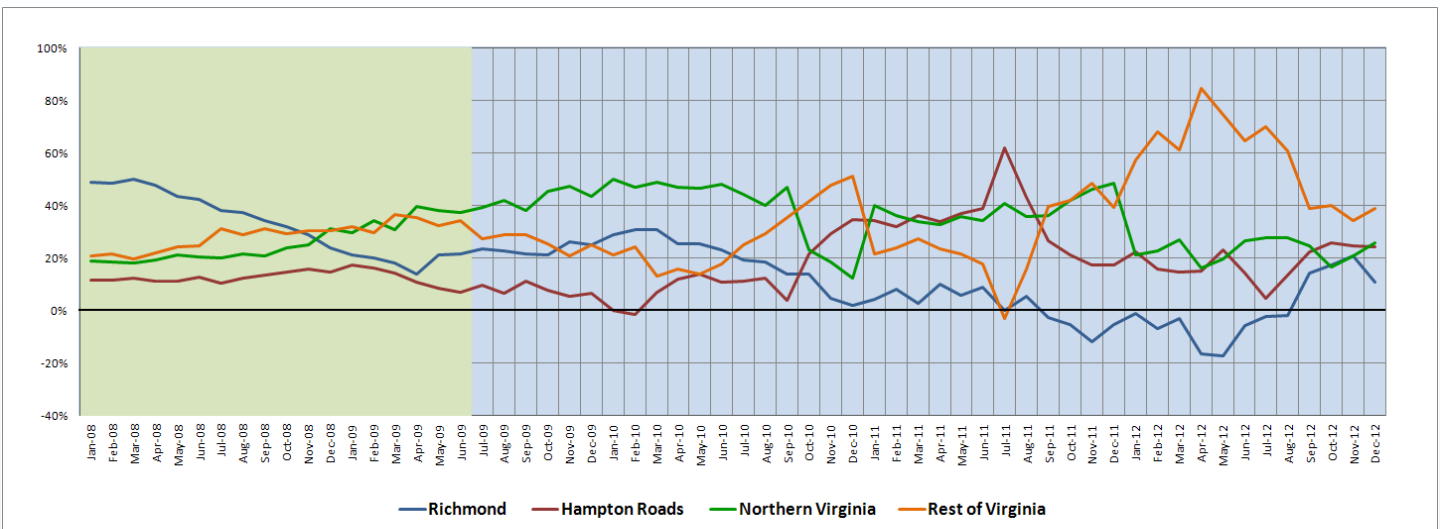


Figure 3 shows the distribution of new HC&SA sector jobs in the Commonwealth over the previous 12-month period. Results below 0% indicate job losses over the twelve month period, resulting in proportional gains for other areas. The regions outside of Virginia's three main MSAs have been the main driver of HC&SA employment growth in 2012, and this trend continued in December. Despite a long-term downward trend line, the Rest of Virginia saw a slight uptick in its regional employment share to 38.9% in December. Meanwhile, Northern Virginia and Hampton Roads each accounted for approximately one-quarter of all employment gains over the past 12 months. However, Richmond saw a sharp drop in its employment share from 20.6% to just 10.8%, but the region continues to exhibit a long-term growth trend in share that started back in May of 2012.

Subsector Employment Growth, Level

Three of Virginia's four HC&SA subsectors experienced net job growth in December. Nursing & Residential Care Facilities experienced the strongest growth, producing 800 jobs during the month. The Social Assistance subsector added 600 jobs, while the Ambulatory Services subsector contributed 400 additional jobs. However, the Hospitals subsector failed to follow the trend in December by losing 400 jobs during the month.

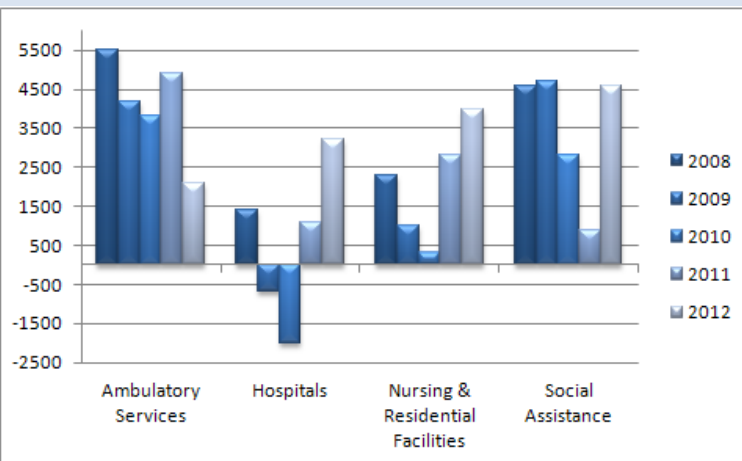


Figure 4: Annual Change in HC&SA Subsector Employment (Not Seasonally Adjusted, Change from Dec to Dec.)

For the full year 2012, all four HC&SA subsectors saw positive employment growth. The Social Assistance subsector was the single largest contributor to this growth by adding 4,600 jobs, matching gains from 2008 and 2009. Meanwhile, the Nursing & Residential Care Facilities and the Hospitals subsectors both saw their strongest employment gains in the past five years. Together, they produced 7,200 jobs during the year. However, after four years of strong employment gains in which at least 3,500 jobs were produced annually, the Ambulatory Services subsector was a relative underperformer in 2012. In total, Ambulatory Services produced only 2,100 jobs during the year, which was less than half of its total of 4,900 jobs in 2011.

Distribution of Growth by Subsector

Not Seasonally Adjusted	Employment, in Thousands				Growth Rate, Annualized		
	Dec. 2011	Sept. 2012	Nov. 2012	Dec. 2012	12 Month	3 Month	1 Month
Virginia							
Health Care & Social Assistance	387.8	395.1	400.3	401.7	3.6%	6.9%	4.3%
<i>Ambulatory Health Care Services</i>	151.6	152.4	153.3	153.7	1.4%	3.5%	3.2%
<i>Hospitals</i>	101.0	103.6	104.6	104.2	3.2%	2.3%	-4.5%
<i>Nursing & Residential Care Facilities</i>	71.9	74.6	75.1	75.9	5.6%	7.2%	13.6%
<i>Social Assistance</i>	63.3	64.5	67.3	67.9	7.3%	22.8%	11.2%
Virginia Beach, Norfolk, Newport News							
Health Care & Social Assistance	80.7	82.6	83.7	84.1	4.2%	7.5%	5.9%
<i>Hospitals</i>	19.9	20.5	20.4	20.4	2.5%	-1.9%	0.0%
Northern Virginia							
Health Care & Social Assistance	107.9	109.2	110.3	111.5	3.3%	8.7%	13.9%
<i>Ambulatory Health Care Services</i>	48.2	49.3	49.3	49.7	3.1%	3.3%	10.2%
<i>Hospitals</i>	23.8	24.0	24.0	24.0	0.8%	0.0%	0.0%

Preliminary estimates are italicized

In December, the Nursing & Residential Care Facilities and the Social Assistance subsectors continued to produce strong double-digit employment growth rates. In addition, these two subsectors continue to be the major drivers of HC&SA employment growth over the past 12 months. Meanwhile, the Hospitals subsector produced a one-month annualized growth rate of -4.5% after losing 400 jobs in December. Regionally, the Hospitals subsector was stable in both Hampton Roads and Northern Virginia, neither gaining nor losing jobs. However, the Ambulatory Services subsector, which produced 400 jobs across the state, did particularly well in Northern Virginia, which was responsible for all the growth in that subsector this month. Over the past 12 months, this sector has grown by 3.1% in Northern Virginia, which is far above the state-wide rate.

Share of 12-Month Growth by Subsector

Figure 5 shows the distribution of new HC&SA sector jobs across subsectors in the Commonwealth over the previous 12-month period. Results below 0% indicated job loses over the 12-month period, resulting in proportional gains for other subsectors. Over the past three years, there has been significant mean reversion in the shares of 12-month employment growth that is attributable to each of Virginia's four HC&SA subsectors. In 2010 essentially all employment growth came from just two subsectors: Ambulatory Services and Social Assistance. However, over the past 18 months, Nursing & Residential Care Facilities and Hospitals have become more important drivers of HC&SA employment growth.

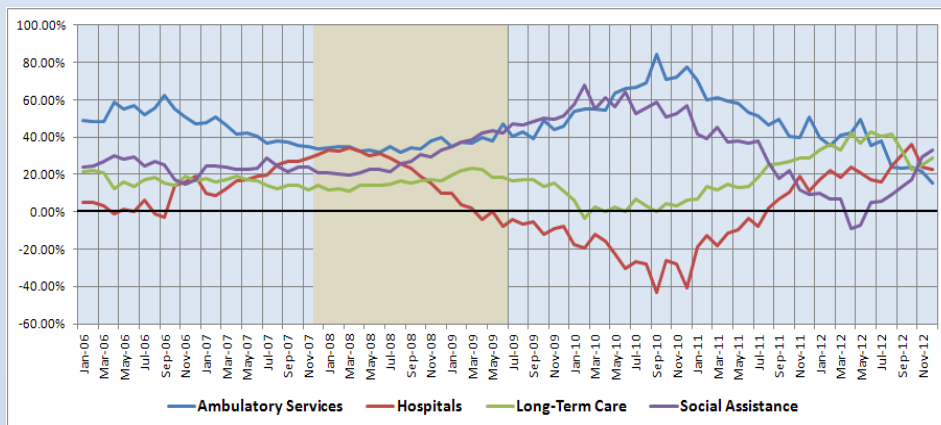


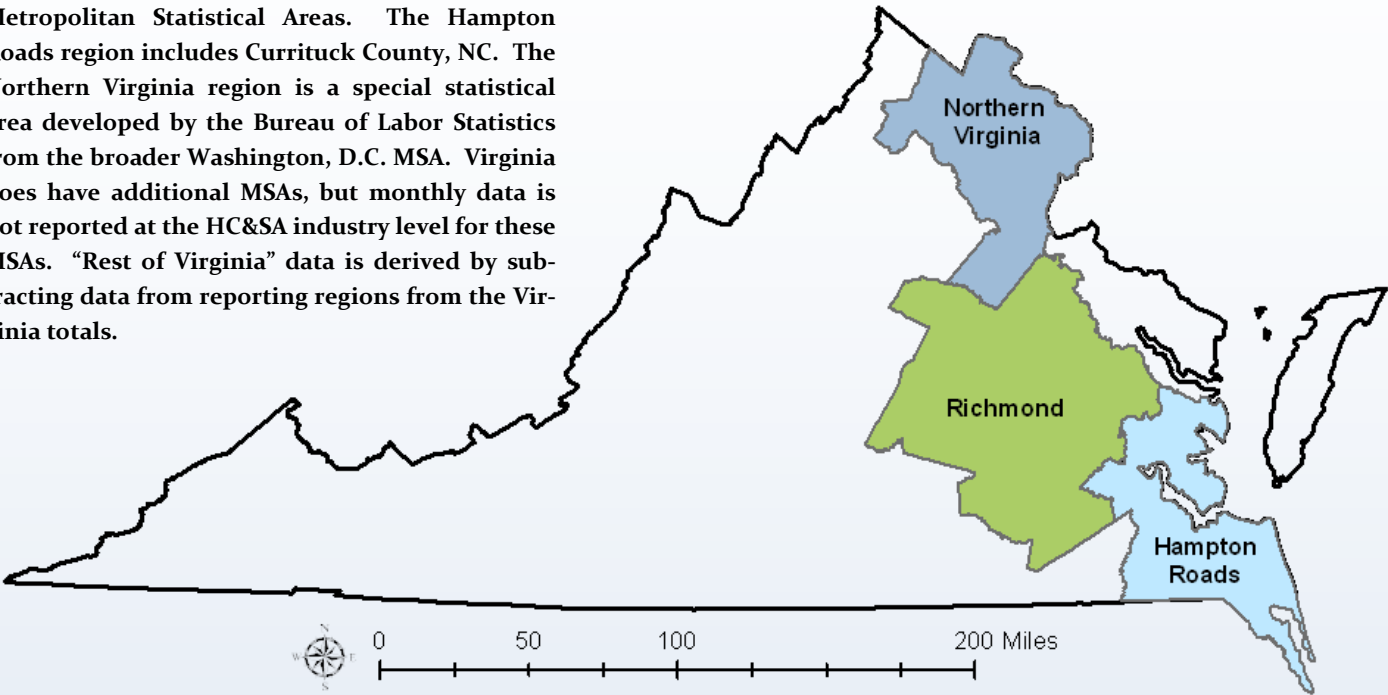
Figure 5: Share of Previous 12-Month Growth in Virginia's HC&SA Sector by Subsector, Not Seasonally Adjusted

After dipping temporarily into negative territory in April of 2011, Social Assistance now has the largest share of employment growth at 33.1%. Meanwhile, Ambulatory Services has the lowest growth share at 15.1%.

All four of Virginia's HC&SA subsectors are currently contributing positively to employment growth over the previous 12 months. After dipping temporarily into negative territory in April of 2011, Social Assistance now has the largest share of employment growth at 33.1%. Meanwhile, Ambulatory Services has the lowest growth share at 15.1%.

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		Currituck, NC	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)