



Virginia Healthcare Workforce Briefs

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

Series 2, Issue 12

December 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, Virginia's Health Care & Social Assistance (HC&SA) sector produced 2,400 net jobs in November.
- ◆ Richmond was the largest contributor to this growth, producing 1,400 HC&SA jobs during the month, while Northern Virginia contributed 800 additional jobs. However, HC&SA employment fell by 900 jobs in Hampton Roads.
- ◆ Every HC&SA subsector produced positive employment gains in November. Hospitals and Nursing & Residential Care Facilities produced 800 jobs each, while Social Assistance created 600 jobs. Ambulatory Services lagged behind with just 200 new jobs.
- ◆ October's preliminary estimates for HC&SA employment were revised upward by 1,900 jobs, increasing October's total HC&SA employment gains to 3,400 jobs. The biggest revision among MSAs was in Hampton Roads with 700 additional jobs.

Data in Brief

Not Seasonally Adjusted*	Employment, in Thousands				Growth Rate, Annualized		
	Nov. 2011	Aug. 2012	Oct. 2012	Nov. 2012	12 Month	3 Month	1 Month
Virginia							
Total Nonfarm	3,722.7	3,715.1	3,749.8	3,764.7	1.1%	5.4%	4.9%
Health Care & Social Assistance	387.7	395.3	398.5	400.9	3.4%	5.8%	7.5%
Virginia Beach, Norfolk, Newport News							
Total Nonfarm	738.9	748.2	743.8	747.1	1.1%	-0.6%	5.5%
Health Care & Social Assistance	80.6	83.2	83.5	82.6	2.5%	-2.9%	12.2%
Northern Virginia							
Total Nonfarm	1,347.2	1,355.9	1,366.0	1,377.9	2.3%	6.6%	11.0%
Health Care & Social Assistance	107.7	109.5	109.7	110.5	2.6%	3.7%	9.1%
Richmond							
Total Nonfarm	613.8	615.8	616.6	618.6	0.8%	1.8%	4.0%
Health Care & Social Assistance	72.9	74.2	75.0	76.4	4.8%	12.4%	24.8%
Rest of Virginia							
Total Nonfarm	1,022.8	995.2	1,023.4	1,021.1	-0.2%	10.8%	-2.7%
Health Care & Social Assistance	126.5	128.4	130.3	131.4	3.9%	9.7%	10.6%

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

Since the beginning of the year, Virginia's HC&SA sector has added a total of 13,100 jobs, which represents an increase of 4,300 jobs from November's brief. This strong uptick in HC&SA employment growth is due to November's strong employment gains of 2,400 jobs and October's upward revision of 1,900 jobs. Virginia's 12-month annualized growth rate for HC&SA employment is now 3.4%, which is significantly higher than the 1.1% increase in total nonfarm payroll employment.

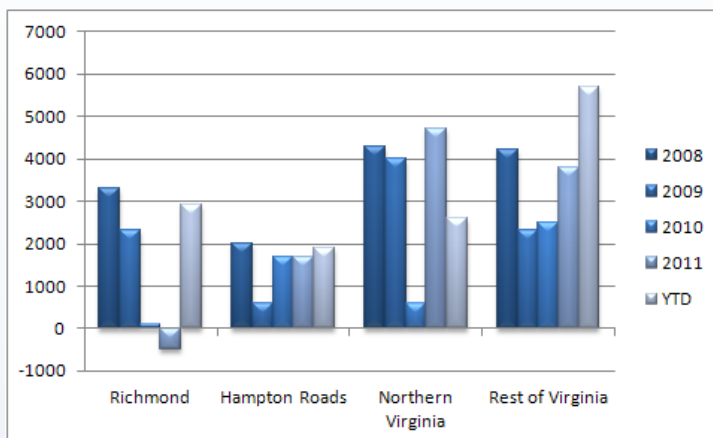


Figure 1: Annual Change in HC&SA Employment (Not Seasonally Adjusted, Change from Dec to Dec.)

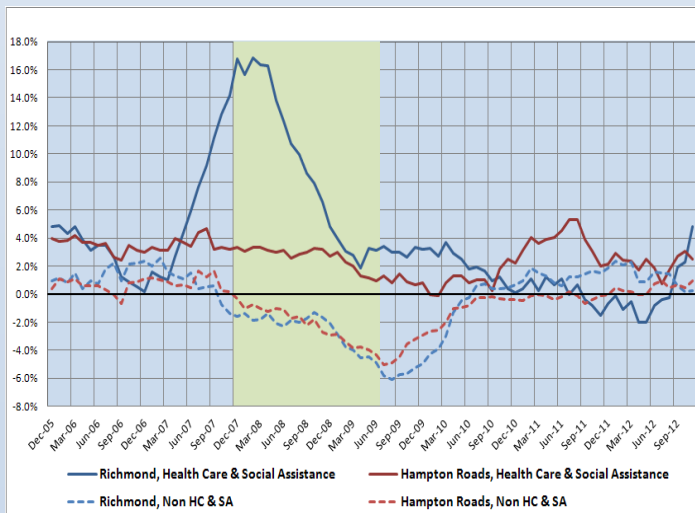
Year over Year Regional Employment Growth

In November, Richmond continued its remarkable acceleration in YOY HC&SA employment growth. Although its growth rate was negative as recently as August, Richmond is now the fastest growing MSA for HC&SA employment in the entire Commonwealth with a current growth rate of 4.8%. This represents the first time Richmond's YOY HC&SA employment growth rate has been above 4% since December of 2008.

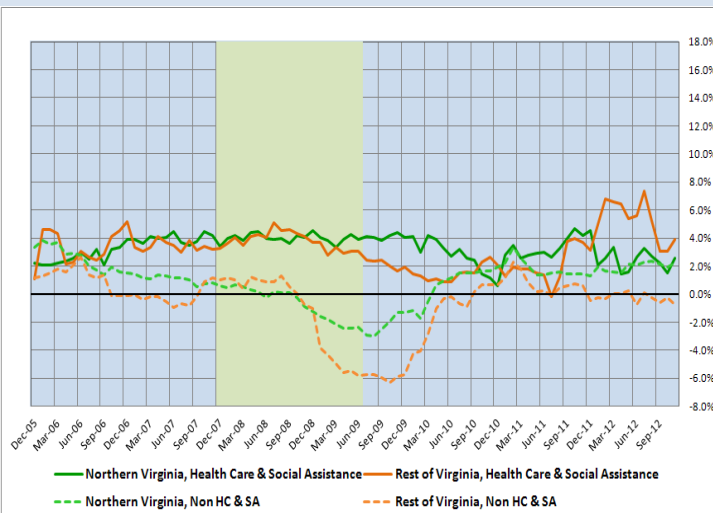
Meanwhile, the Rest of Virginia and Northern Virginia saw significant upticks in their YOY HC&SA employment growth rates during the month. The Rest of Virginia now has a growth rate of 3.9%, while Northern Virginia's growth rate rebounded to 2.6%. Hampton Roads now has the slowest-growing HC&SA sector in the state at 2.5% YOY employment growth. However, HC&SA employment growth is higher than non-HC&SA growth in every region in Virginia.

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.

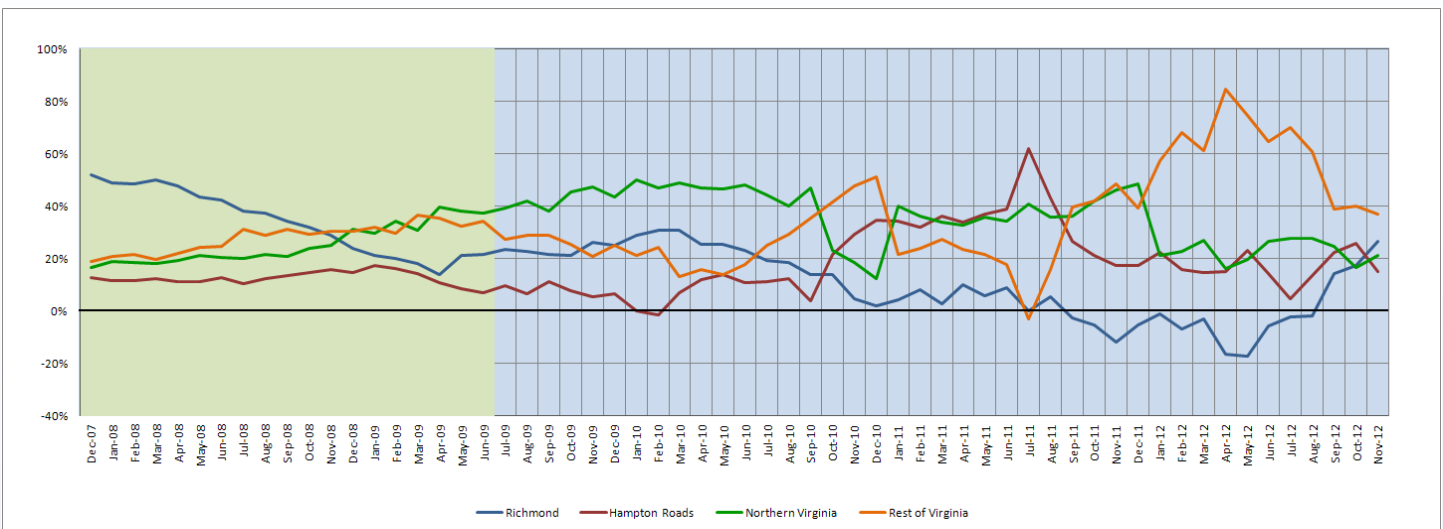


Figure 3 shows the distribution of new HC&SA sector jobs in the Commonwealth over the previous 12-month period. Results below 0% indicate job losses over the twelve month period, resulting in proportional gains for other areas. For most of 2012, the majority of 12-month employment growth was concentrated in the Rest of Virginia (outside the state's three main MSAs). For instance, in April of 2012, the Rest of Virginia accounted for nearly 85% of all HC&SA employment growth over the previous 12 months. However, the Rest of Virginia's share has now fallen to just 37.1%. Although this region is still the single largest contributor to HC&SA employment growth, it is quickly reverting to the mean. Much of its growth has been replaced by Richmond's HC&SA sector, which was seen its share increase from a low of -17.2% in May to 26.5% in November, making Richmond the second-largest growth region in terms of HC&SA employment over the past 12 months. Meanwhile, Northern Virginia rebounded its share above 20%, while Hampton Roads saw its share decrease to 15.1%.

Subsector Employment Growth, Level

HC&SA employment growth in November was broad-based with respect to subsectors. All four HC&SA subsectors saw employment gains during the month, led by the Hospitals and Nursing & Residential Care Facilities subsectors, which produced 800 jobs each. The Social Assistance subsector contributed an additional 600 jobs, while the Ambulatory Health Care Services subsector was the laggard at just 200 new net jobs.

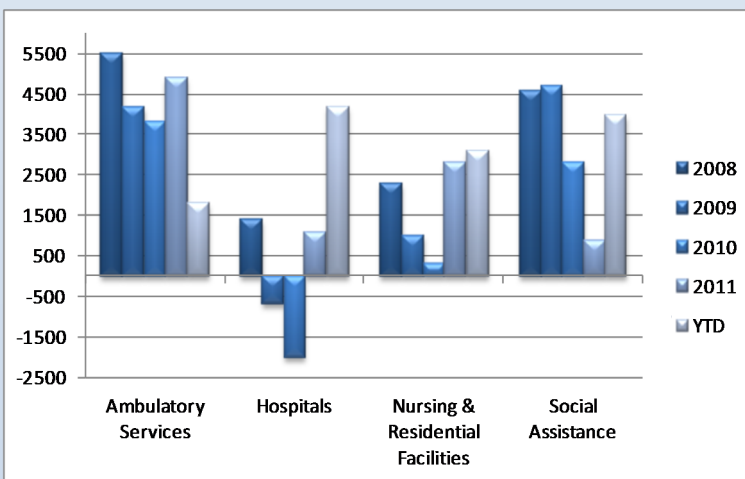


Figure 4: Annual Change in HC&SA Subsector Employment (Not Seasonally Adjusted, Change from Dec to Dec.)

Of the 13,100 HC&SA jobs produced in Virginia YTD, 8,200 (63%) were produced in either the Hospitals or Social Assistance subsectors. Employment growth in the Hospitals subsector is particularly impressive given four straight years of relative stagnation, including two years of absolute employment losses in 2009 and 2010. Likewise, the Social Assistance and Nursing & Residential Facilities subsectors are on pace for strong employment gains in 2012. However, with just 1,800 jobs created YTD, the Ambulatory Services subsector is on pace for its weakest year in terms of employment growth in the past five year.

Distribution of Growth by Subsector

Not Seasonally Adjusted	Employment, in Thousands				Growth Rate, Annualized		
	Nov. 2011	Aug. 2012	Oct. 2012	Nov. 2012	12 Month	3 Month	1 Month
Virginia							
Health Care & Social Assistance	387.7	395.3	398.5	400.9	3.4%	5.8%	7.5%
<i>Ambulatory Health Care Services</i>	150.6	152.2	153.2	153.4	1.9%	3.2%	1.6%
<i>Hospitals</i>	101.6	103.0	104.4	105.2	3.5%	8.8%	9.6%
<i>Nursing & Residential Care Facilities</i>	71.9	75.7	74.2	75.0	4.3%	-3.6%	13.7%
<i>Social Assistance</i>	63.6	64.4	66.7	67.3	5.8%	19.3%	11.3%
Virginia Beach, Norfolk, Newport News							
Health Care & Social Assistance	80.6	83.2	83.5	82.6	2.5%	-2.9%	-12.2%
<i>Hospitals</i>	19.9	20.4	20.5	20.4	2.5%	0.0%	-5.7%
Northern Virginia							
Health Care & Social Assistance	107.7	109.5	109.7	110.5	2.6%	3.7%	9.1%
<i>Ambulatory Health Care Services</i>	47.3	49.2	49.4	49.4	4.4%	1.6%	0.0%
<i>Hospitals</i>	23.7	24.0	23.9	24.1	1.7%	1.7%	10.5%

Preliminary estimates are italicized

Over the past 12 months, three of Virginia's four HC&SA subsectors — Social Assistance, Nursing & Residential Care Facilities and Hospitals — have produced higher annualized growth rates than the industry as a whole, a trend that continued in November as well. Both Nursing & Residential Care Facilities and Social Assistance subsectors produced one-month annualized growth rates of over 10%, while the Hospitals subsector came in just under that number. Regionally, HC&SA employment growth in Hampton Roads fell precipitously on a one-month annualized basis, but its 12-month growth rate is a more respectable 2.5%. Meanwhile, Northern Virginia saw strong one-month annualized employment growth in its Hospital subsector.

Share of HC&SA Employment by Subsector

The recent trends concerning the three-month moving average in YOY HC&SA subsector employment growth described in the previous brief continued unabated in November. Although it is still the fastest grower in this category, the Nursing & Residential Care Facilities subsector continues to revert to the mean; its three-month moving average in YOY employment growth fell below 4% for the first time since September of 2011. Alternatively, the Social Assistance and Hospitals subsectors continue to gain ground in relative employment share. The 3-month moving average in YOY employment growth increased to 3.5% in the Social Assistance subsector and to 3.3% in the Hospitals subsector. If present trends continue, these two subsectors could quickly overtake the Nursing & Residential Care Facilities subsector in the coming months. However, the Ambulatory Services subsector continues to lag behind the others with a growth rate of just 1.6%

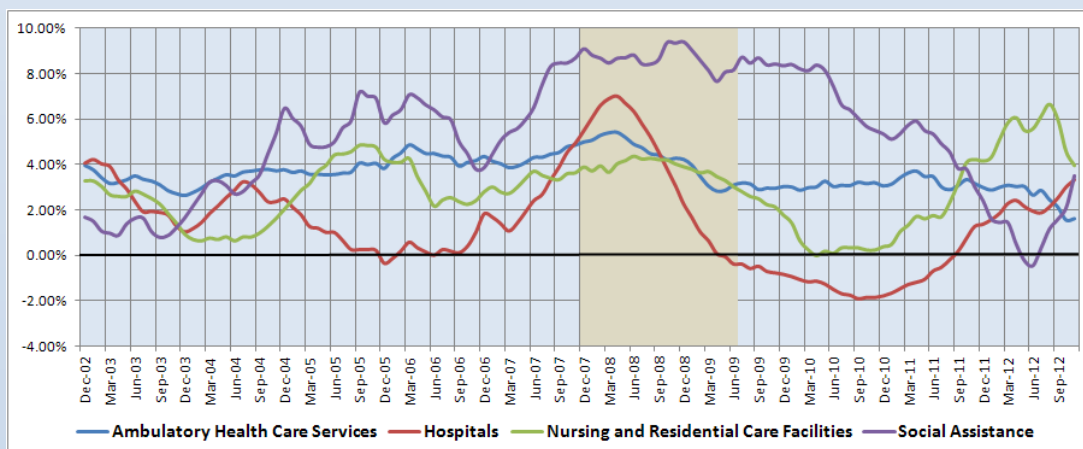
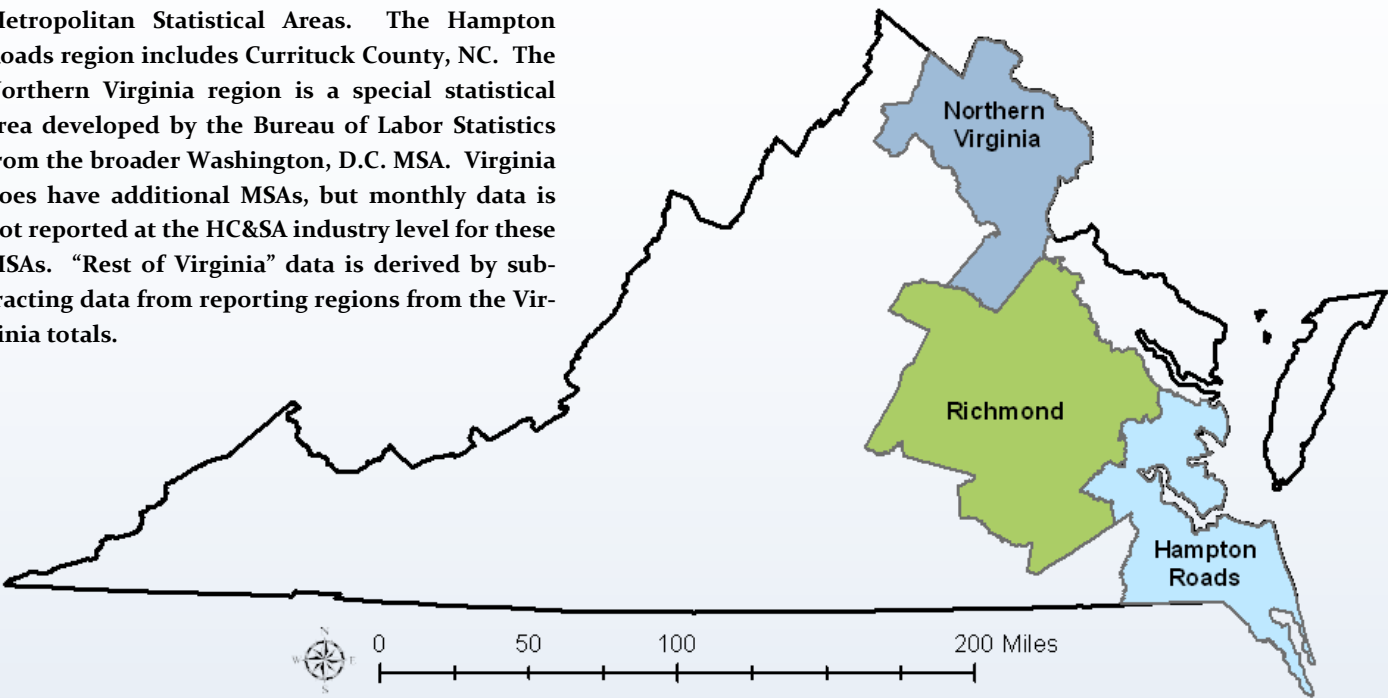


Figure 5: Year-Over-Year Change in Employment, 3-Month Moving Average

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		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)