



# Virginia Healthcare Workforce Briefs

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

Series 2, Issue 6

June 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 factors. Estimates for the most recent month are preliminary.
- ◆ Based on preliminary estimates, Virginia's large Metropolitan Statistical Areas (MSAs) gained 2,400 Health Care & Social Assistance (HC&SA) jobs in May. Hampton Roads gained 1,500 jobs, Northern Virginia gained 900 jobs and Richmond broke even.
- ◆ April's preliminary estimates were revised upward by 400 jobs in Richmond, 300 jobs in Hampton Roads, and 900 jobs in Northern Virginia.
- ◆ The Rest of Virginia's HC&SA sector experienced its first job losses of the year, losing 1,900 jobs in May according to preliminary estimates. Additionally, revised estimates lowered April's preliminary estimate of 1,300 jobs gained by 500 jobs.
- ◆ Statewide, Ambulatory Services gained 1,000 jobs and Social Assistance gained 700 jobs. Hospitals and Residential Facilities each shed 600 jobs.
- ◆ The Richmond MSA's HC&SA sector continued its lackluster performance, having shed jobs or gained no jobs in eight of the past 12 months.

## Data in Brief

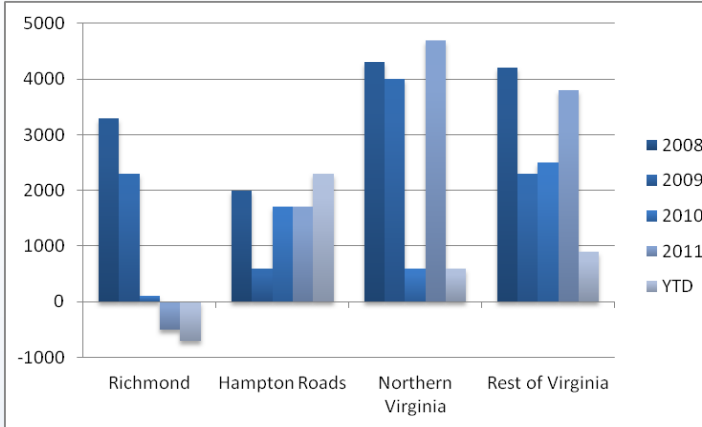
Not Seasonally Adjusted*	Employment, in Thousands				Growth Rate, Annualized		
	May 2011	Feb 2012	Apr 2012	May 2012	12m Growth	3m growth, annualized	1m growth, annualized
<b>Virginia</b>							
Total Nonfarm	3701.2	3661.9	3720.1	3744.9 <sup>P</sup>	1.2%	9.4%	8.3%
Health Care & Social Assistance	382.5	388.5	390.4	390.9 <sup>P</sup>	2.2%	2.5%	1.5%
<b>Virginia Beach, Norfolk, Newport News</b>							
Total Nonfarm	743.6	723.8	739.3	748.0 <sup>P</sup>	0.6%	14.1%	15.1%
Health Care & Social Assistance	80.4	81.0	81.5	83.0 <sup>P</sup>	3.2%	10.2%	24.5%
<b>Northern Virginia</b>							
Total Nonfarm	1,332.2	1,328.8	1,345.7	1,359.7 <sup>P</sup>	2.1%	9.6%	13.2%
Health Care & Social Assistance	106.7	107.2	107.6	108.5 <sup>P</sup>	1.7%	4.9%	10.5%
<b>Richmond</b>							
Total Nonfarm	614.2	609.4	615.2	617.4 <sup>P</sup>	0.5%	5.4%	4.4%
Health Care & Social Assistance	74.5	72.7	72.8	72.8 <sup>P</sup>	-2.3%	0.6%	0.0%
<b>Rest of Virginia</b>							
Total Nonfarm	1,011.2	999.9	1,019.9	1,019.8 <sup>P</sup>	0.9%	8.2%	-0.1%
Health Care & Social Assistance	120.9	127.6	128.5	126.6 <sup>P</sup>	4.7%	-3.1%	-16.4%

<sup>P</sup>: Preliminary Results

\*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 growth in Virginia's HC&SA sector has been slow so far this year, adding only 3,100 jobs YTD, an annualized rate of 1.93% (See HWDC Workforce Briefing Series 1: **State & National Employment** for more robust seasonally-adjusted data). Although declining HC&SA employment is normal in the first couple of months of the year, it usually re-



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

bounds by spring. By comparison, the national HC&SA sector has grown at an annualized rate of 2.13%.

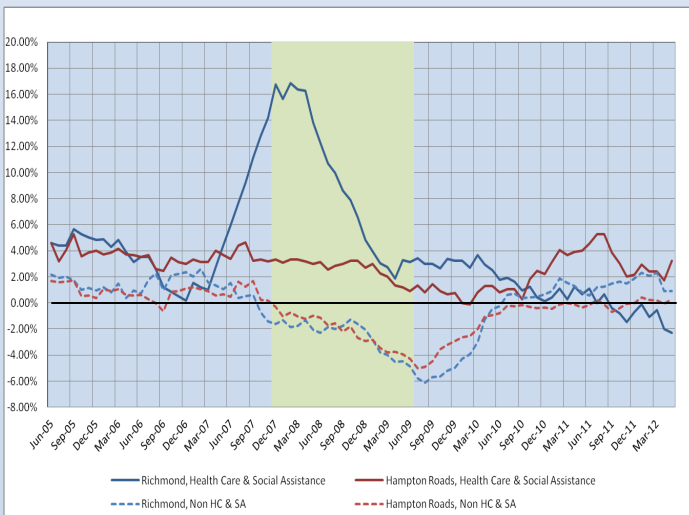
April revisions and May performance have caused a drastic change in the regional distribution of YTD job growth in Virginia's HC&SA sector reported in this series. Northern Virginia, which previously posted YTD losses of over 1,000, is now posting slight job gains for the year. Richmond pared some of its YTD losses. Through May, YTD gains in Hampton Roads are larger than any total year gains since 2008. YTD job gains in the Rest of Virginia's HC&SA sector have dropped from a robust 3,300 to 900.

## Year over Year Regional Employment Growth

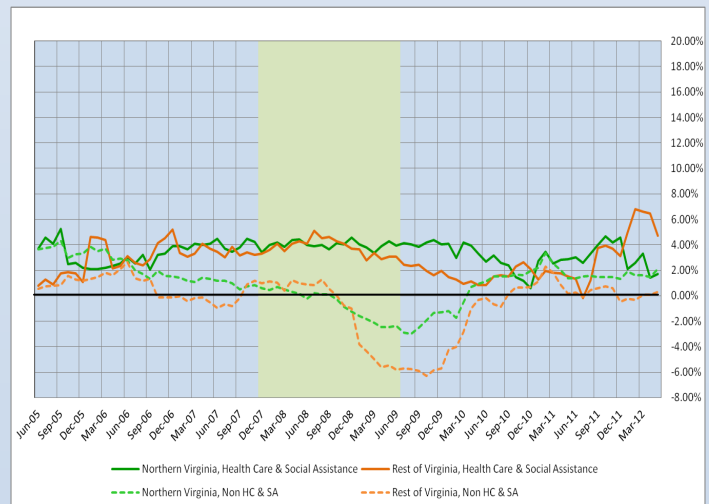
Virginia's HC&SA sector has been a source of employment strength for all areas of the Commonwealth throughout the recent recession and, with the exception of Richmond, most of the recovery. Richmond experienced a surge of HC&SA sector hiring beginning in fall of 2007 that continued almost into 2009. Hiring began to erode in 2010, and Richmond's HC&SA sector has experienced year-over-year declines since September 2011, culminating in a new low of 2.28% YOY decline for May. Job growth in non-HC&SA sectors returned to more normal levels in early 2010. However, the HC&SA sector remained a relatively strong source of job growth in all areas except Richmond. More recently, the HC&SA sector has exhibited robust growth outside of Virginia's three largest metro areas. Despite the most recent monthly drop, YOY employment rose by 4.71% in rural and small metro 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.**

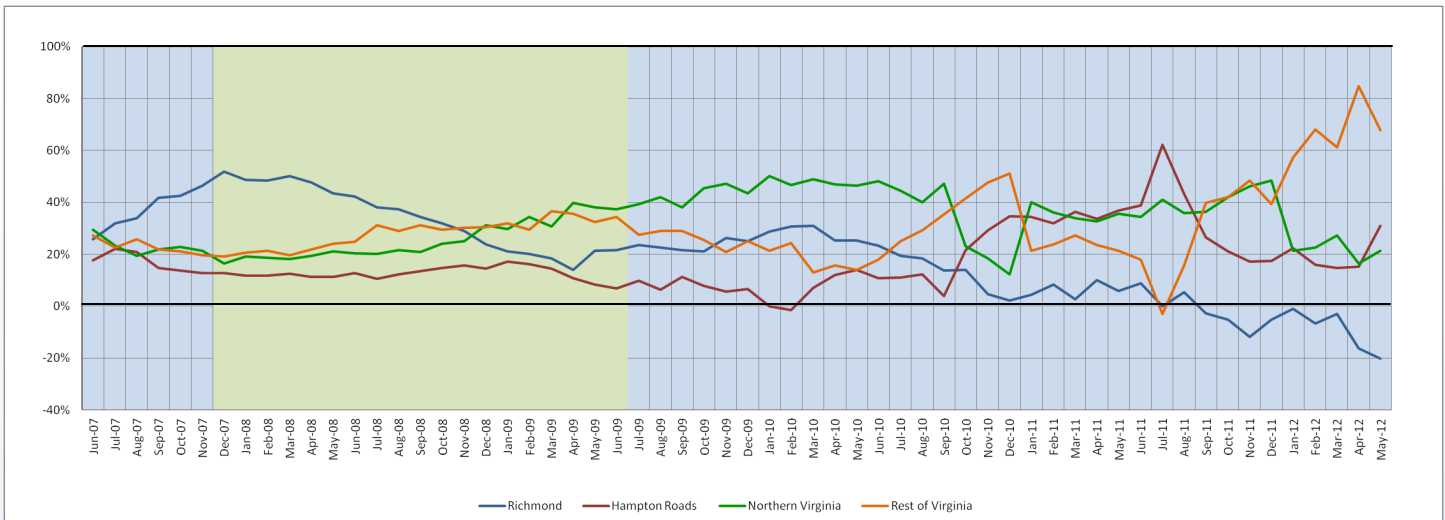
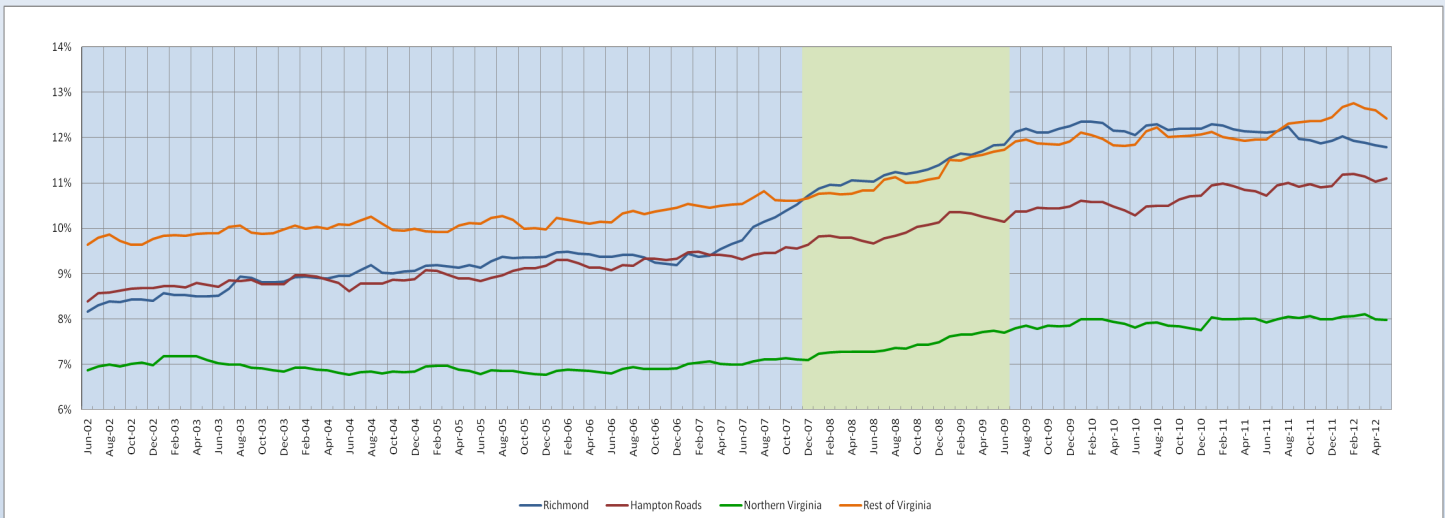


Figure 3 shows the distribution of new HC&SA sector jobs in the Commonwealth over the previous 12-month period. Results below 0% indicate job losses over the twelve month period, resulting in proportional gains for other areas. Although April revisions erased its previously reported 102% gain, the Rest of Virginia (areas outside of Virginia's three largest MSAs) continues to capture a disproportionate share of Virginia's 12-month HC&SA growth. It captured 67.9% of growth since last May despite this May's losses. Job losses have come from Richmond, which has lost 1,700 jobs in the prior 12 months, mathematically resulting in the Richmond MSA shifting a 20.24% share of Virginia's HC&SA job growth to other regions. Hampton Roads took a 31% share, and Northern Virginia a 21.4% share.

## Share of Employment

**Figure 4: The HC&SA Sector's Share of Nonfarm Employment, Not Seasonally Adjusted.**



Despite recent job losses in the Richmond MSA, the HC&SA sector remains a prominent employer, accounting for 11.7% of non-farm employment in May. The HC&SA sector's importance as a local employer grew in all regions through the recent recession, most prominently in the Richmond MSA. The HC&SA sector captures the smallest share (7.98%) of non-farm employment in Northern Virginia. The other three area are bunched, with the HC&SA sector capturing the largest share (12.41%) of nonfarm employment outside of Virginia's three largest MSAs, overtaking Richmond MSA (11.79% share) in July. Hampton Roads' HC&SA sector captures an 11.10% share of the MSA's non-farm employment.

## Distribution of Growth by Subsector

Not Seasonally Adjusted	Employment, in Thousands				Growth Rate, Annualized		
	May 2011	Feb 2012	Apr 2012	May 2012	12m Growth	3m growth, annualized	1m growth, annualized
<b>Virginia</b>							
Health Care & Social Assistance	382.5	388.5	390.4	390.9 <sup>P</sup>	2.2%	2.5%	1.5%
<i>Ambulatory Health Care Services</i>	148.7	150.4	152.0	153.0 <sup>P</sup>	2.9%	7.1%	8.2%
<i>Hospitals</i>	99.4	101.6	101.6	101.0 <sup>P</sup>	1.6%	-2.3%	-6.9%
<i>Nursing &amp; Residential Care Facilities</i>	69.6	72.9	73.2	72.6 <sup>P</sup>	4.3%	-1.6%	-9.4%
<i>Social Assistance</i>	64.8	63.6	63.6	64.3 <sup>P</sup>	-0.8%	4.5%	14.0%
<b>Virginia Beach, Norfolk, Newport News</b>							
Health Care & Social Assistance	80.4	81.0	81.5	83.0 <sup>P</sup>	3.2%	10.2%	24.5%
<i>Hospitals</i>	19.9	20.1	20.2	20.2 <sup>P</sup>	1.5%	2.0%	0.0%
<b>Northern Virginia</b>							
Health Care & Social Assistance	106.7	107.2	107.6	108.5 <sup>P</sup>	1.7%	4.9%	10.5%
<i>Ambulatory Health Care Services</i>	47.3	47.8	48.6	49.5 <sup>P</sup>	4.7%	15.0%	24.6%
<i>Hospitals</i>	23.9	23.6	23.7	23.7 <sup>P</sup>	-0.8%	1.7%	0.0%

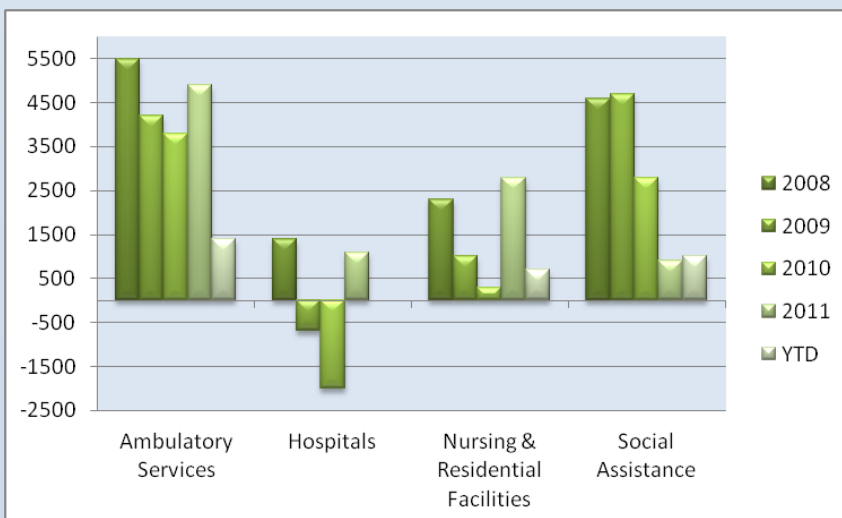
<sup>P</sup>: Preliminary Results

Job gains in the HC&SA sector in May occurred in the Ambulatory Services and Social Assistance sectors. The Ambulatory Services subsector, gained 1,000 jobs in May, an annualized rate of 8.2%. Additionally, revisions to April figures converted a preliminary 900 job loss in Ambulatory Services into a 100 job gain for the subsector. The subsector has gained 3,000 jobs since hitting a 150,000 job trough in January. The Social Assistance subsector gained jobs at the fastest rate, gaining 700 jobs for a 14.0% annualized rate. However, revisions left May's loss of 600 jobs largely unchanged. The Hospital and Nursing & Residential Facilities subsectors lost 600 jobs each in preliminary estimates. Employment levels in the hospital subsector are now back at the December 2011 levels according to preliminary estimates

## Share of HC&amp;SA Employment by Subsector

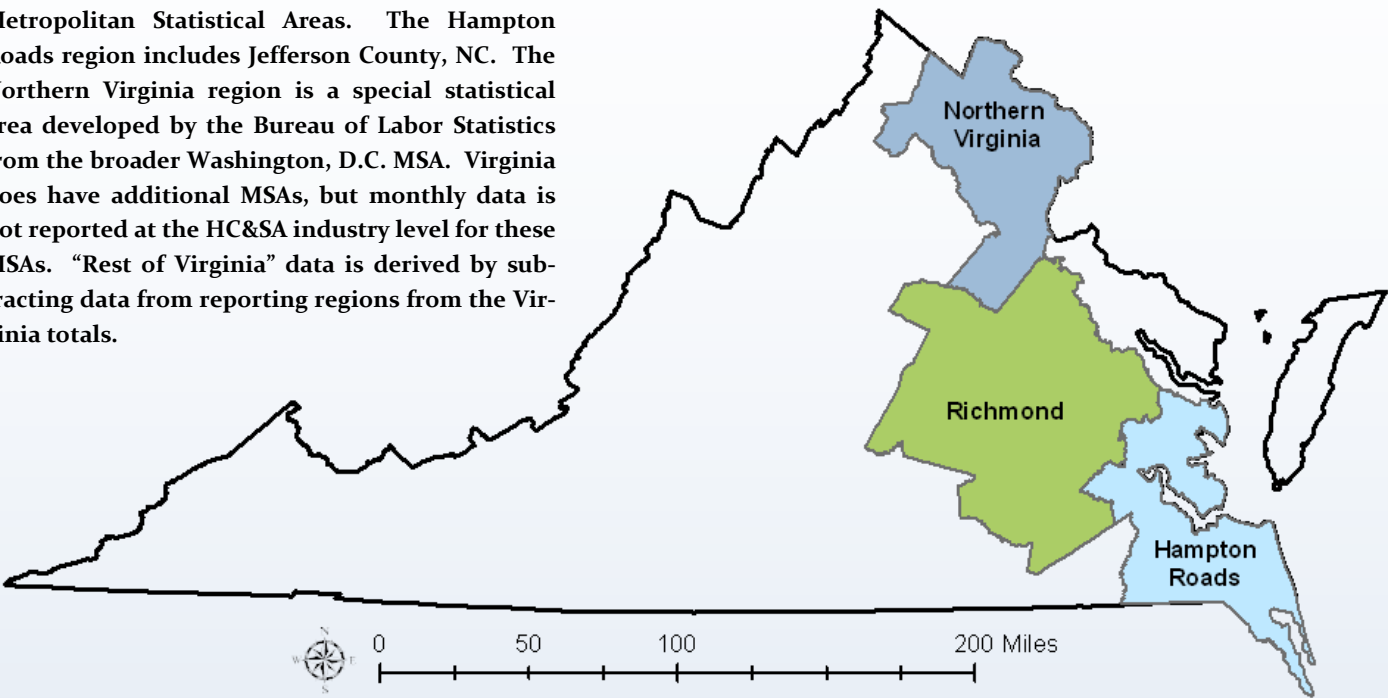
Over the past five years, annual job gains in Ambulatory Services have been steady, even through the recession. By contrast, hospitals experienced declining employment in 2009 and 2010. While hospitals regained some losses in 2011, they have yet to regain employment peaks of 102,600 jobs last reached in Dec. 2008, and are flat so far in 2012. Job growth slowed in 2009 and 2010 in the Nursing & Residential Facilities subsector, but remained positive. The subsector experienced robust job gains in 2011. The Social Assistance sector experienced slower growth somewhat later, in 2010, which continued into 2011. Growth has returned to the subsector thus far in 2012.

**Figure 5: Annual Change in Employment by Subsector (Not Seasonally Adjusted, change from Dec to Dec).**



Region Map

HWDC *Briefing Series 2* uses Federally designated Metropolitan Statistical Areas. The Hampton Roads region includes Jefferson 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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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/](http://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)

## 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).