



Virginia Healthcare Workforce Briefs

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

Series 2, Issue 11

November 2012

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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.
- ◆ Based on preliminary estimates, Health Care & Social Assistance (HC&SA) month-over-month payroll employment in Virginia's largest Metropolitan Statistical Areas (MSAs) increased by 1,500 jobs in October. Every major region in Virginia saw HC&SA employment gains during the month: 600 jobs in Northern Virginia, 500 jobs in Richmond and 200 jobs in Hampton Roads. In addition, the Rest of Virginia saw HC&SA employment gains of 200 jobs.
- ◆ September's preliminary estimates for HC&SA employment were revised upward by 500 jobs in Hampton Roads, 300 jobs in Northern Virginia and 200 jobs in the Rest of Virginia. Only Richmond's saw a downward revision (-100 jobs) of its estimate.
- ◆ HC&SA employment growth was primarily driven by the Social Assistance subsector, which grew by 2,300 jobs during the month. The other three subsectors — Ambulatory Services, Hospitals and Nursing Facilities — saw a combined decline of 800 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

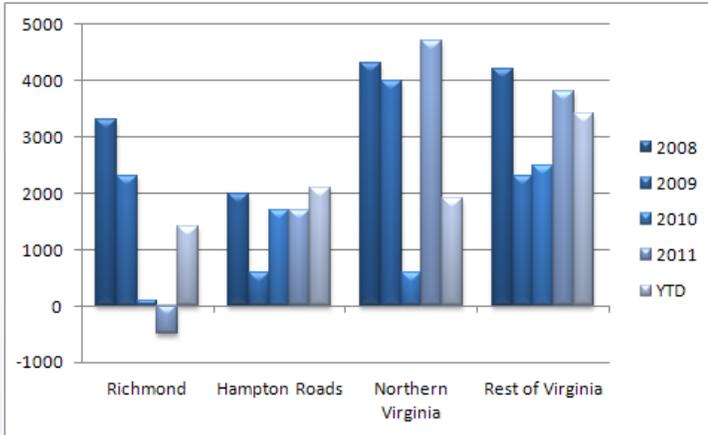
Not Seasonally Adjusted*	Employment, in Thousands				Growth Rate, Annualized		
	Oct.	July	Sept.	Oct.	12 Month	3 Month	1 Month
Virginia							
Total Nonfarm	3,714.9	3,729.1	3,729.1	3,744.4	0.8%	1.7%	5.0%
Health Care & Social Assistance	388.8	394.4	395.1	396.6	2.0%	2.2%	4.7%
Virginia Beach, Norfolk, Newport News							
Total Nonfarm	738.3	754.1	742.7	742.7	0.6%	-5.9%	0.0%
Health Care & Social Assistance	81.0	82.4	82.6	82.8	2.2%	2.0%	2.9%
Northern Virginia							
Total Nonfarm	1,340.7	1,361.7	1,359.6	1,363.5	1.7%	0.5%	3.5%
Health Care & Social Assistance	108.1	109.8	109.2	109.8	1.6%	0.0%	6.8%
Richmond							
Total Nonfarm	614.0	618.0	614.4	616.3	0.4%	-1.1%	3.8%
Health Care & Social Assistance	73.3	73.8	74.4	74.9	2.2%	6.1%	8.4%
Rest of Virginia							
Total Nonfarm	1,021.9	995.3	1,012.4	1,021.9	0.0%	11.1%	11.9%
Health Care & Social Assistance	126.4	128.4	128.9	129.1	2.1%	2.2%	1.9%

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 Employment Growth, Level

On a not seasonally adjusted basis, Virginia's HC&SA sector has added 8,800 jobs YTD. This most recent number was buoyed by both October's robust employment growth of 1,500 jobs and September's upward revision of 900 jobs from its preliminary estimates. October's results represent a one-month annualized growth rate of 4.65%, which is up significantly



from September's rate of -0.61%. This number also represents the first time that YOY HC&SA employment growth has exceeded 2% since May of 2010.

Every region in the state experienced positive HC&SA employment gains in October, but growth was largest in Northern Virginia and Richmond, where a combined 1,100 jobs were created. In addition, YTD HC&SA employment growth has been rather strong across all of Virginia's regions. Growth continues to remain strongest in the Rest of Virginia, which is responsible for nearly 40% of Virginia's YTD HC&SA employment growth. However, thanks to more robust results in Virginia's major MSAs, the share attributable to the Rest of Virginia is down from 47% in September.

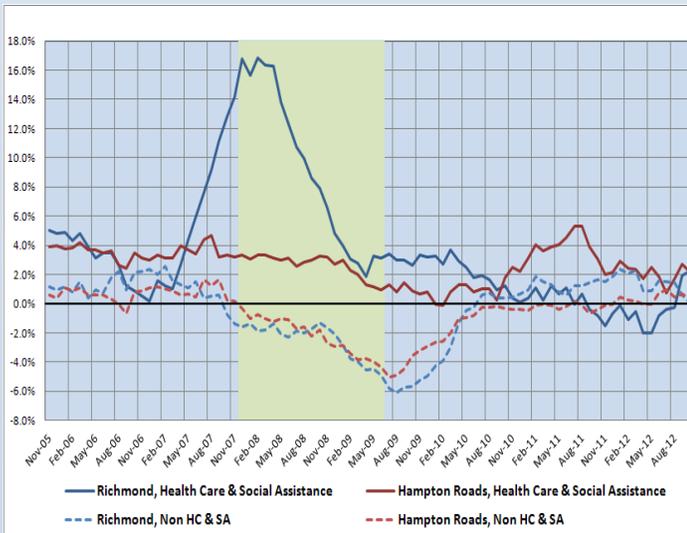
Figure 1: Annual Change in HC&SA Employment (Not Seasonally Adjusted, Change from Dec to Dec.)

Year over Year Regional Employment Growth

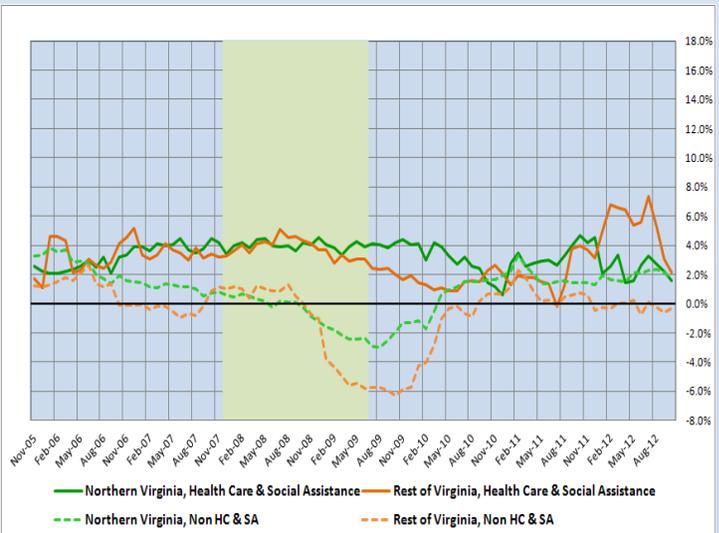
During the month of October, year-over-year HC&SA employment growth rates have continued to converge across Virginia's MSAs. Richmond, Hampton Roads and the Rest of Virginia all currently have year-over-year employment growth rates of between 2.14% and 2.22%. Northern Virginia is the laggard among Virginia's MSAs, but even this region is experiencing year-over-year employment growth of 1.57%. Despite these long-term growth trends, however, three of Virginia's four regions saw declines in their year-over-year HC&SA rate of employment growth in October of between 0.52% and 0.90%. Only Richmond saw growth during the month, increasing its YOY growth rate by 0.26% to 2.18%. This represents the fastest growth rate in Richmond in more than two years. Although HC&SA employment growth appears to be slowing, it is still growing faster than non-HC&SA employment growth in every region except Northern 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.

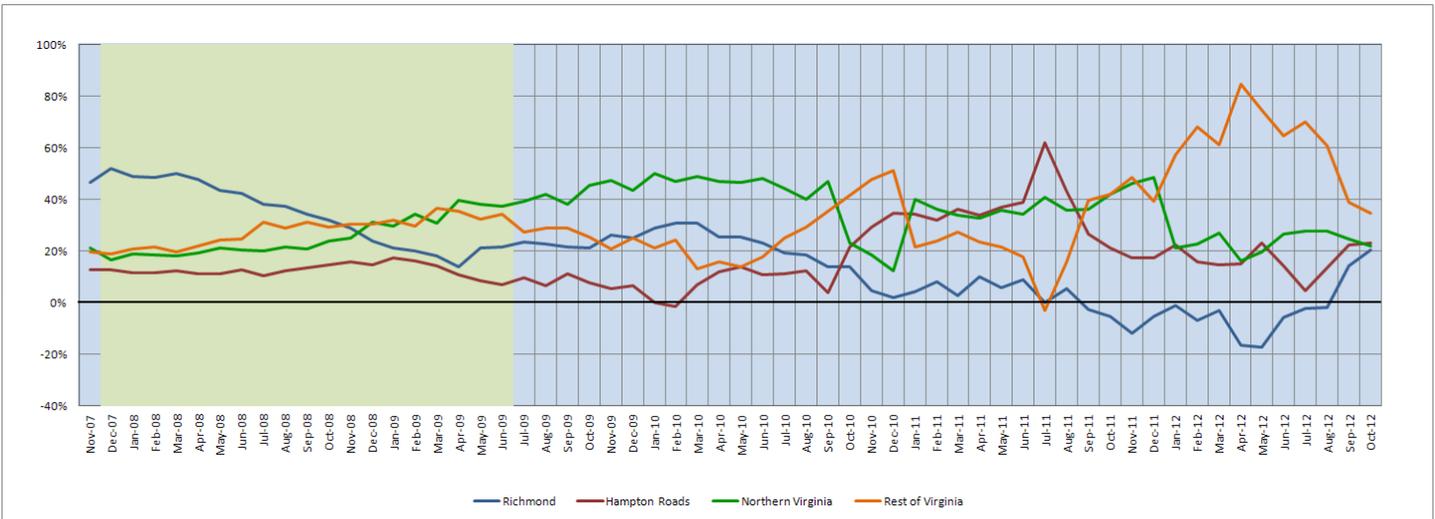
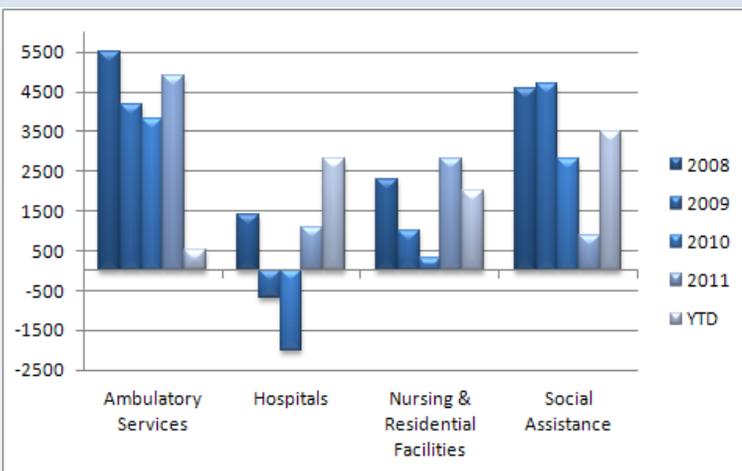


Figure 3 shows the distribution of new HC&SA sector jobs in the Commonwealth over the previous 12-month period. Results below 0% indicate job losses over the twelve month period, resulting in proportional gains for other areas. Although the Rest of Virginia continues to be the single largest driver of 12-month HC&SA employment growth, the region has continued to recent slide relative to Virginia three MSAs. The Rest of Virginia’s share is now down to 34.62%, its lowest level since August of 2011. Meanwhile, Richmond continues to exhibit impressive employment growth in its HC&SA sector. After turning positive in September for the first time in over a year, Richmond’s share of HC&SA employment growth rose yet again in October to 20.5%. If present trends continue, Richmond will eclipse both Northern Virginia and Hampton Roads in terms of its share of HC&SA employment growth in the coming months. Regardless, Hampton Roads did experience its third consecutive month of increased HC&SA employment growth share in October.

Subsector Employment Growth, Level

HC&SA employment growth in October was driven almost entirely by impressive gains in the Social Assistance subsector, which produced 2,300 jobs. The only other subsector that produced positive job growth in October was the Hospitals subsector, which grew by 200 jobs. Meanwhile, the Nursing & Residential Care Facilities subsector lost 700 jobs, and the Ambulatory Health Care Services subsector lost an additional 300 jobs.



Thanks to its strong growth in October, the Social Assistance subsector, which was a laggard with respect to YTD employment growth in September, catapulted to the state’s single largest contributor to HC&SA employment growth in 2012. The Social Assistance subsector is now responsible for 39.77% of YTD job growth, while the Hospitals and Nursing & Residential Care Facilities subsectors have added at least 2,000 jobs each. However, Ambulatory Services continues to lag behind the other subsectors, contributing only 500 jobs to the HC&SA sector.

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

Distribution of Growth by Subsector

Not Seasonally Adjusted	Employment, in Thousands				Growth Rate, Annualized		
	Oct. 2011	July 2012	Sept. 2012	Oct. 2012	12 Month	3 Month	1 Month
Virginia							
Health Care & Social Assistance	388.8	394.4	395.1	396.6	2.0%	2.2%	4.7%
<i>Ambulatory Health Care Services</i>	150.9	153.2	152.4	152.1	0.8%	-2.8%	-2.3%
<i>Hospitals</i>	100.9	101.8	103.6	103.8	2.9%	8.1%	2.3%
<i>Nursing & Residential Care Facilities</i>	72.0	75.2	74.6	73.9	2.6%	-6.7%	-10.7%
<i>Social Assistance</i>	65.0	64.2	64.5	66.8	2.8%	17.2%	52.3%
Virginia Beach, Norfolk, Newport News							
Health Care & Social Assistance	81.0	82.4	82.6	82.8	2.2%	2.0%	2.9%
<i>Hospitals</i>	19.9	20.1	20.5	20.4	2.5%	6.1%	-5.7%
Northern Virginia							
Health Care & Social Assistance	108.1	109.8	109.2	109.8	1.6%	0.0%	6.8%
<i>Ambulatory Health Care Services</i>	48.4	49.9	49.3	49.4	2.1%	-3.9%	2.5%
<i>Hospitals</i>	23.7	24.0	24.0	23.9	0.8%	-1.7%	-4.9%

Preliminary estimates are italicized

Virginia gained 1,500 HC&SA jobs in September, which represents a one-month annualized growth rate of 4.7%. The Social Assistance subsector was responsible for most of these gains by producing 2,300 jobs during the month, which represents a one-month annualized growth rate of 52.3%. However, the 12-month annualized growth rate for the Social Assistance subsector is a more modest 2.8%. This number is line with the 12-month annualized growth rate experienced by the Hospitals and Nursing & Residential Care Facilities subsectors, which have both grown by more than 2.5%. Only the Ambulatory Health Care Services subsector fails to meet this threshold with a 12-month annualized growth rate of less than 1%.

Share of HC&SA Employment by Subsector

Recent trends across HC&SA subsectors with respect to the three-month moving average in year-over-year employment growth continued unabated in October. The Nursing and Residential Care Facilities subsector, while still the faster grower among the four subsectors, continued to see its three-month moving average fall during the month. It is now at 4.43%, which is down more than 2% from its high back in August. Meanwhile, the Ambulatory Health Care Services subsector, which has seen its three-month moving average fall by more than half over the past several months, has now become the slowest growing subsector in the entire state.

The Hospitals subsector, which overtook Ambulatory Services last month, saw its moving average increase to 2.82%, while the Social Assistance subsector finally outpaced Ambulatory Services in October with a three-month moving average of YOY employment growth of 2.13%. Only Ambulatory Services is currently below 2% growth.

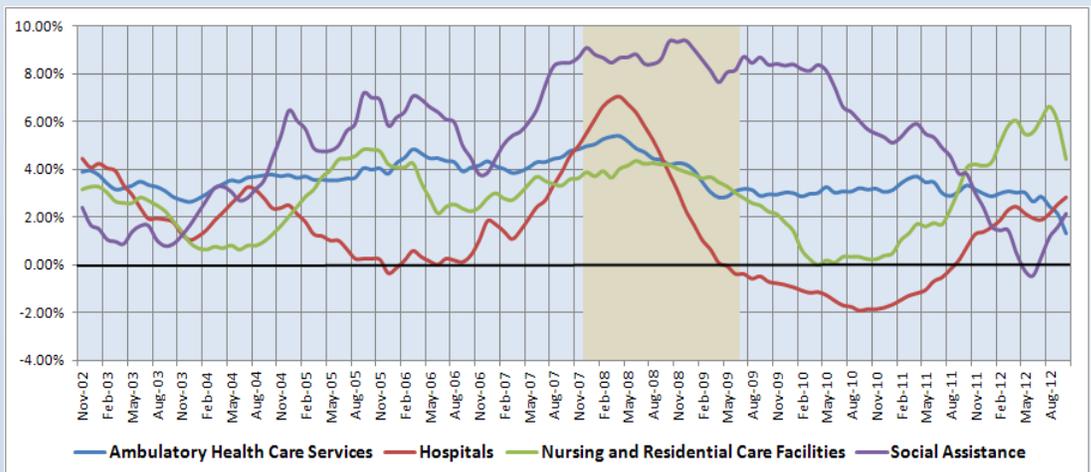
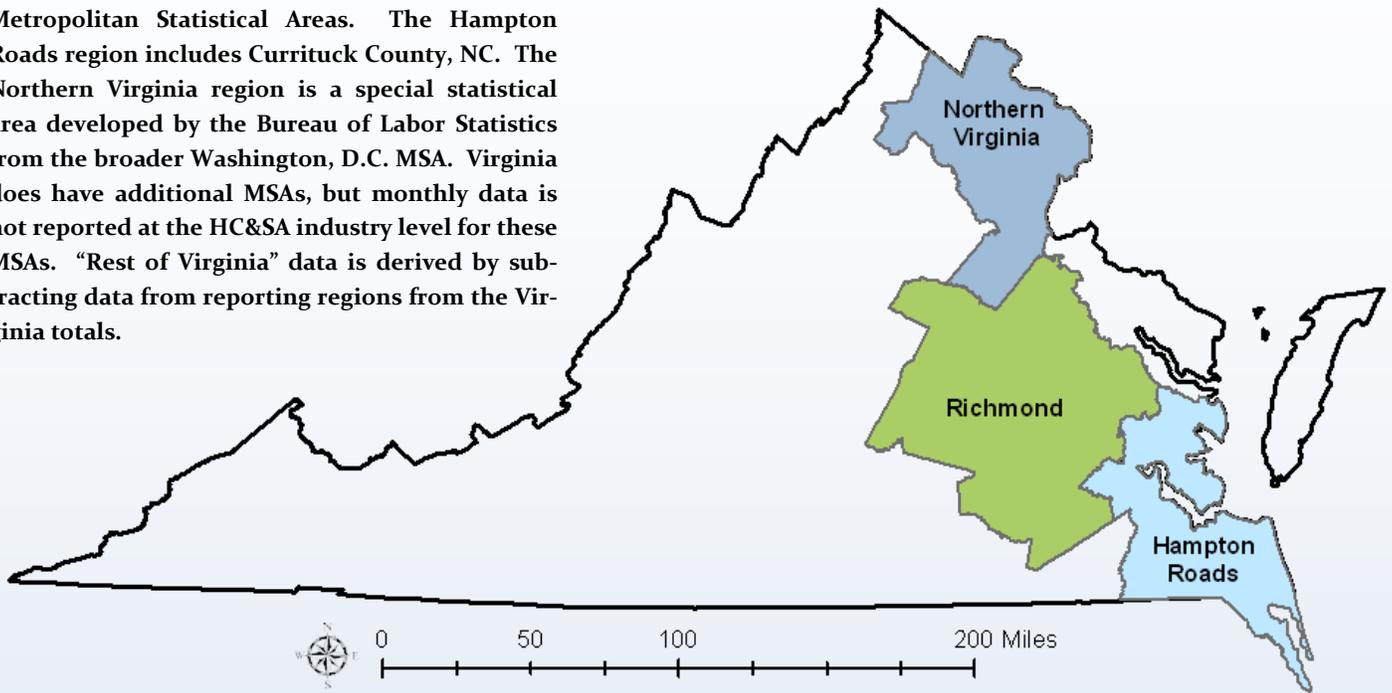


Figure 5: Year-Over-Year Change in Employment, 3-Month Moving Average

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	
<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)