



# Virginia Healthcare Workforce Briefs

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

Series 2, Issue 18

June 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.
- ◆ According to preliminary estimates, Virginia's HC&SA sector lost 1,200 jobs in May. Although this represents a one-month annualized growth rate of -3.5%, the 12-month growth rate remains a robust 2.9%, more than twice the employment growth rate of Virginia's overall economy.
- ◆ April's preliminary estimate for HC&SA employment was revised upward by 500 jobs. With this revision, Virginia's HC&SA sector had its best month so far in 2013 by adding 2,500 jobs in April.
- ◆ Jobs losses were concentrated in the regions of Northern Virginia and Richmond, where HC&SA employment fell by 2,900 jobs. Meanwhile, Hampton Roads and the Rest of Virginia actually managed to add a total of 1,700 jobs in May.
- ◆ Subsector losses were also concentrated in two areas: Ambulatory Health Care Services and Nursing & Residential Care Facilities. These two subsectors lost a total of 1,500 jobs in May, while Social Assistance countered the trend by adding 300 jobs.

## Data in Brief

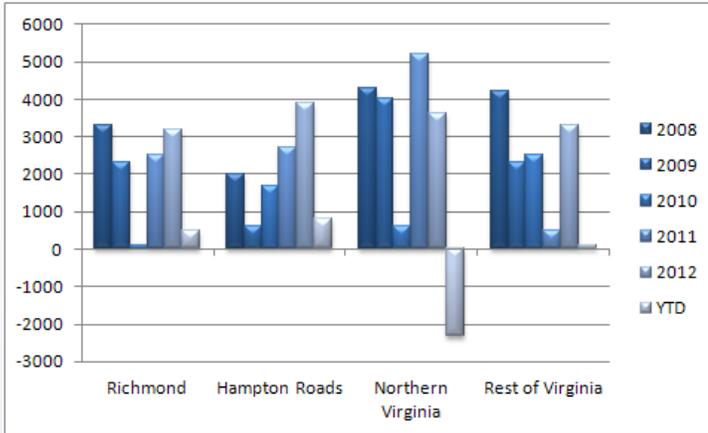
Not Seasonally Adjusted*	Employment, in Thousands				Growth Rate, Annualized		
	May 2012	Feb. 2013	Apr. 2013	May 2013	12 Month	3 Month	1 Month
<b>Virginia</b>							
Total Nonfarm	3,733.7	3,707.8	3,764.5	3,783.7	1.3%	8.4%	6.3%
Health Care & Social Assistance	390.9	400.9	403.3	402.1	2.9%	1.2%	-3.5%
<b>Virginia Beach, Norfolk, Newport News</b>							
Total Nonfarm	744.1	743.0	755.0	759.1	2.0%	9.0%	6.7%
Health Care & Social Assistance	82.6	84.9	85.3	86.4	4.6%	7.3%	16.6%
<b>Northern Virginia</b>							
Total Nonfarm	1,354.0	1,348.4	1,368.1	1,377.9	1.8%	9.0%	8.9%
Health Care & Social Assistance	109.4	110.0	111.6	109.7	0.3%	-1.1%	-18.6%
<b>Richmond</b>							
Total Nonfarm	624.8	624.2	631.5	634.4	1.5%	6.7%	5.7%
Health Care & Social Assistance	76.7	80.5	81.2	80.2	4.6%	-1.5%	-13.8
<b>Rest of Virginia</b>							
Total Nonfarm	1,010.8	992.2	1,009.9	1,012.3	0.1%	8.4%	2.9%
Health Care & Social Assistance	122.2	125.5	125.2	125.8	2.9%	1.0%	5.9%

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

May was a disappointing month for Virginia’s HC&SA sector. Across the state, 1,200 health care jobs were lost in a month in which Virginia’s total nonfarm payroll increased by 19,200 jobs. Meanwhile, April’s preliminary estimate for HC&SA employment was revised upward by 500 jobs. In total, 2,500 jobs were created in Virginia’s HC&SA sector in April, making it the strongest month in terms of employment growth in 2013.



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

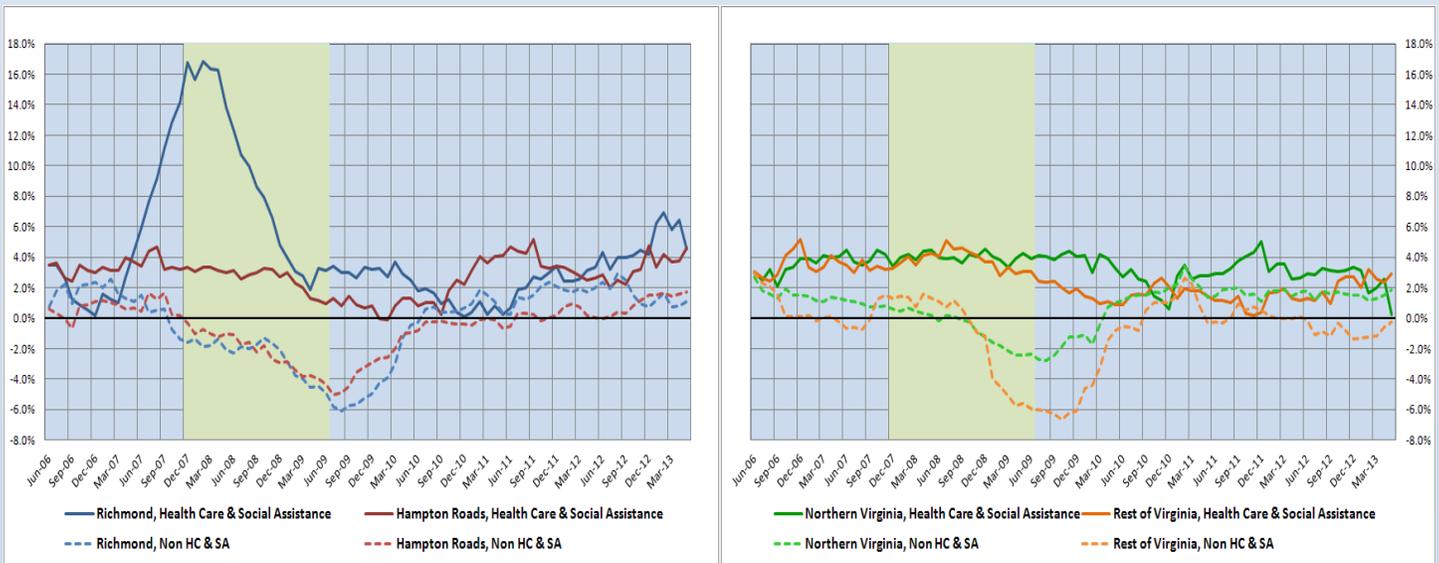
Northern Virginia was hit particularly hard by May’s reduction in HC&SA employment. For the month, the region lost 1,900 jobs. In addition, Northern Virginia has been the only region in the state to experience year-to-date job losses in the HC&SA sector. So far in 2013, the region has lost 2,300 HC&SA jobs, which is more than the combined contributions of the other three regions in the state. Richmond also lost 1,000 HC&SA jobs in May, but it has still managed to produce 500 net jobs during the current year. Countering this weakness, Hampton Roads was able to produce 1,100 HC&SA jobs in May. With this strong performance, Hampton Roads has become the strongest HC&SA region this year with 800 new jobs.

## Year-Over-Year Regional Employment Growth

Given the strong performance of Hampton Roads’ HC&SA sector combined with the weakness of Richmond’s employment numbers, Hampton Roads overtook Richmond in May as the fastest-growing region in the state with respect to year-over-year HC&SA employment growth. Whereas Richmond’s year-over-year growth rate fell by 29% from 6.42% to 4.56%, Hampton Roads saw its year-over-year employment growth rate increase by 22% from 3.77% to 4.60%.

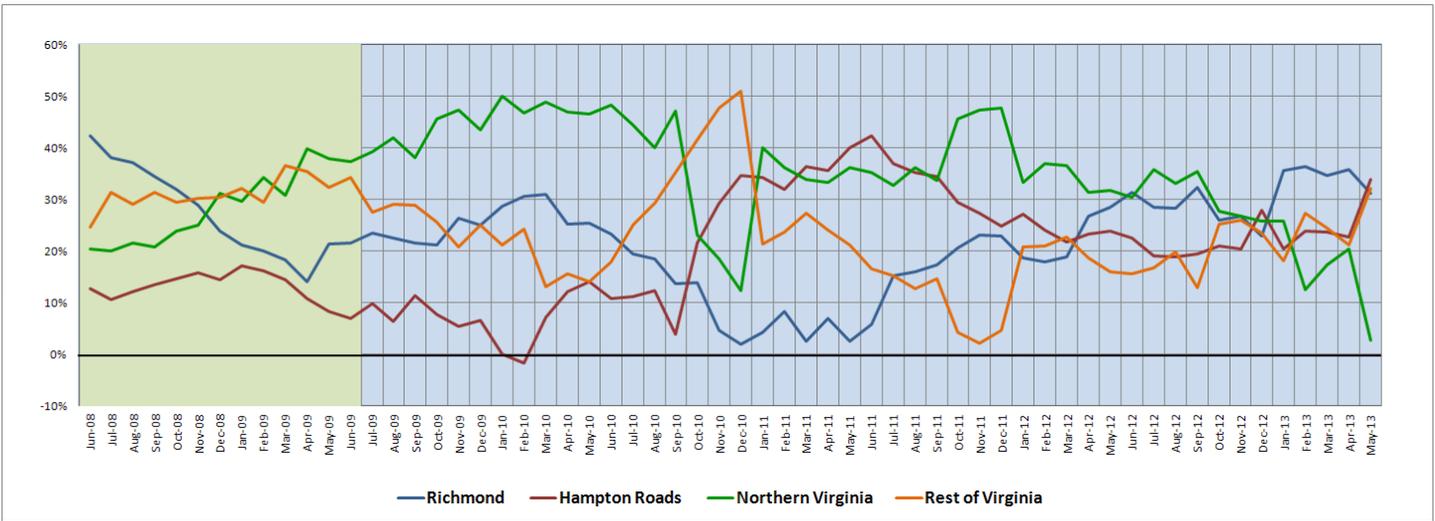
Meanwhile, Northern Virginia saw its year-over-year HC&SA employment growth rate plummet by nearly 90% in May after losing 1,900 jobs. Its growth rate now sits at just 0.27%, making Northern Virginia by far the slowest-growing region in the state. This also represents the slowest growth rate for Northern Virginia since May 2004. The next slowest-growing region, the Rest of Virginia, currently sports a year-over-year employment growth rate of 2.95%.

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



## Regional Share of 12-month Growth

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



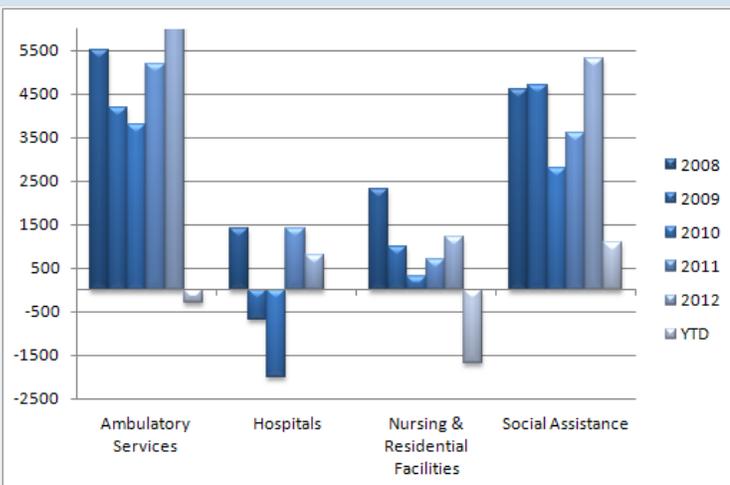
May was the first month in 2013 in which Richmond did not command the largest share of 12-month employment growth in Virginia’s HC&SA sector. In fact, it was overtaken by two other regions, Hampton Roads and the Rest of Virginia, both of which increased their respective growth shares by 50% during the month. All three of these regions are each responsible for approximately one-third of the 12-month employment growth in the HC&SA sector.

However, the most notable change was with Northern Virginia. Just like its year-over-year growth rate, its employment growth share fell precipitously from 20.44% to 2.68% in May. This represents the lowest share for any region since the Rest of Virginia reached an employment growth share of just 2.11% in November 2011.

## Subsector Employment Growth

HC&SA subsector employment losses were concentrated in two areas: Ambulatory Health Care Services and Nursing & Residential Care Facilities. Ambulatory Health Care Services lost 1,000 jobs in May, while Nursing & Residential Care Facilities lost 500 jobs during the month. The only subsector that managed to produce positive employment growth in May was Social Assistance, which added 300 jobs. The only other subsector, Hospitals, saw no change in its employment situation.

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



May’s results mirror the year-to-date employment numbers for these subsectors. So far in 2013, Social Assistance is the only HC&SA subsector that has added jobs, but this gain of 1,100 year-to-date jobs has been overwhelmed by losses in the Ambulatory Health Care Services and Nursing & Residential Care Facilities subsectors. Nursing & Residential Care Facilities has been the weakest subsector, losing 1,700 jobs in 2013, while Ambulatory Health Care Services has lost a relatively modest 300 jobs over the first five months of the year. Meanwhile, the Hospitals subsector, which saw no net change in employment in May, has also seen no growth in its employment numbers for all of 2013. These subsectors have combined to lose 900 HC&SA jobs in 2013; at the same point in 2012, these subsectors had added 1,900 jobs.

### Distribution of Growth by Subsector

Not Seasonally Adjusted	Employment, in Thousands				Growth Rate, Annualized		
	May 2012	Feb. 2013	Apr. 2013	May 2013	12 Month	3 Month	1 Month
<b>Virginia</b>							
Health Care & Social Assistance	390.9	400.9	403.3	402.1	2.9%	1.2%	-3.5%
<i>Ambulatory Health Care Services</i>	154.4	158.1	159.3	158.3	2.5%	0.5%	-7.3%
<i>Hospitals</i>	99.9	101.0	102.1	102.1	2.2%	4.4%	0.0%
<i>Nursing &amp; Residential Care Facilities</i>	69.7	70.1	69.8	69.3	-0.6%	-4.5%	-8.3%
<i>Social Assistance</i>	66.9	71.7	72.1	72.4	8.2%	4.0%	5.1%
<b>Virginia Beach, Norfolk, Newport News</b>							
Health Care & Social Assistance	82.6	84.9	85.3	86.4	4.6%	7.3%	16.6%
<i>Hospitals</i>	20.2	20.7	21.1	21.1	4.5%	8.0%	0.0%
<b>Northern Virginia</b>							
Health Care & Social Assistance	109.4	110.0	111.6	109.7	0.3%	-1.1%	-18.6%
<i>Ambulatory Health Care Services</i>	50.1	50.7	50.8	49.5	-1.2%	-9.1%	-26.7%
<i>Hospitals</i>	22.8	22.8	23.0	23.1	1.3%	5.4%	5.3%

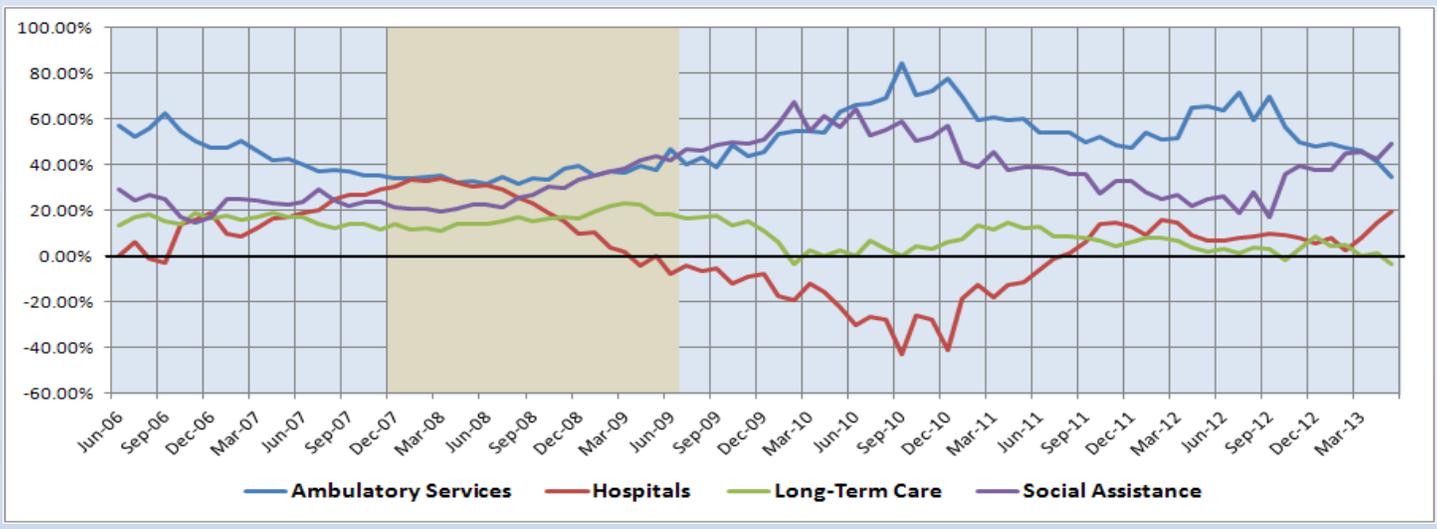
Preliminary estimates are italicized

Although employment in Virginia’s HC&SA sector has grown by a strong 2.9% over the past 12 months, three of its four subsectors have actually underperformed this number. This is especially true of the Nursing & Residential Care Facilities subsector, which has seen its employment numbers contract by 0.6% over the past 12 months. HC&SA employment growth has been driven by the Social Assistance subsector, which has added 5,500 jobs in the past year, representing a strong 12-month growth rate of 8.2%. Meanwhile, Northern Virginia’s Ambulatory Health Care Services subsector had a particularly weak month, losing 1,300 jobs in May. It has also lost 600 jobs over the past year, which represents a growth rate of -1.2%.

### Share of 12-Month Growth by Subsector

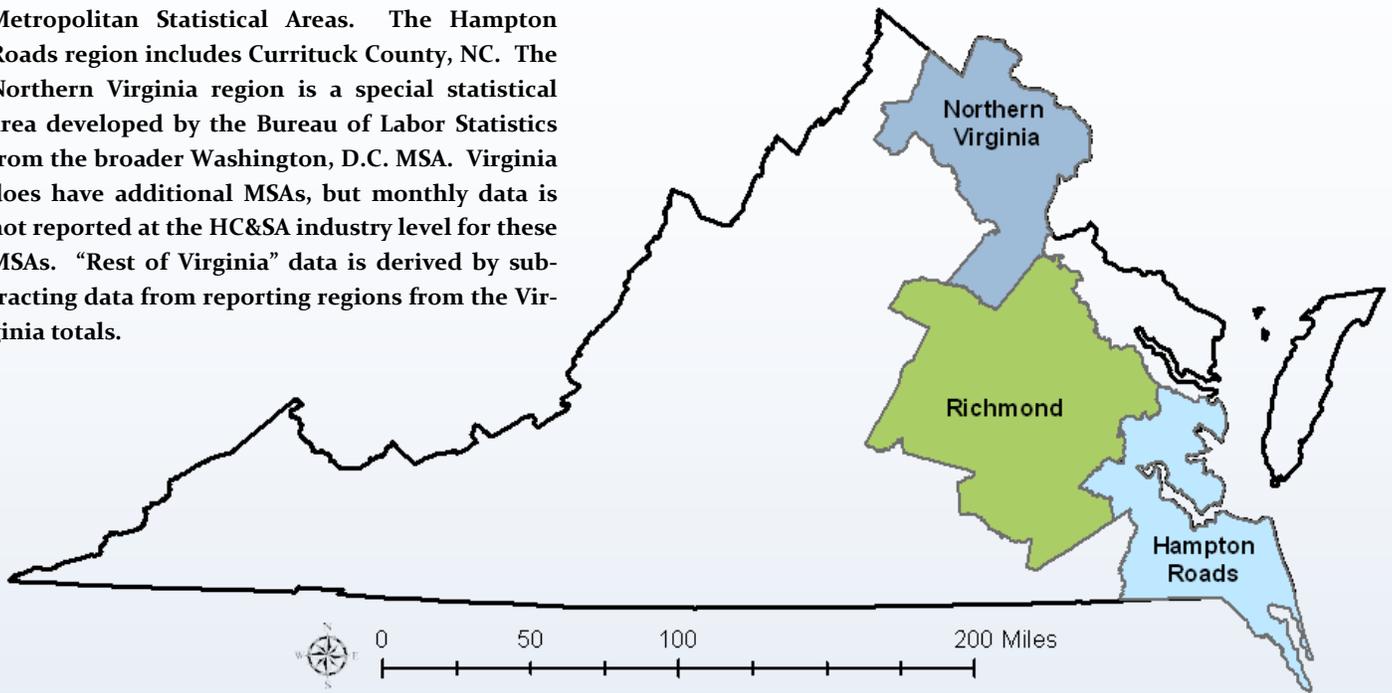
Given the weakness in the Ambulatory Health Care Services subsector, its share of the previous 12-month growth in Virginia’s HC&SA sector fell yet again in May. Since July 2012, its share has fallen by half from 71.43% to 34.82%. Meanwhile, the Social Assistance subsector, which became the largest HC&SA subsector in terms of employment growth share in April, now accounts for nearly half of all growth in Virginia’s health care industry over the past year. The Hospitals subsector also improved its growth share in May to 19.64%, its highest value since the end of the recession in 2009.

**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>	
<b>Counties:</b>	<b>Cities</b>	<b>Counties:</b>	<b>Cities</b>	<b>Counties:</b>	<b>Cities</b>
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/](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)