



# Virginia Healthcare Workforce Briefs

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

Series 2, Issue 15

March 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 added 2,600 jobs in February, which helped to mitigate January's losses.
- ◆ January's preliminary estimate was revised upward by 200 jobs. With this revision, employment in Virginia's HC&SA sector lost 4,200 jobs in the previous month.
- ◆ Employment growth was strongest in Hampton Roads and the Rest of Virginia; both regions added 1,300 jobs in February. Richmond also experienced strong HC&SA employment gains during the month, adding 700 jobs. However, Northern Virginia bucked the trend, losing 700 HC&SA jobs.
- ◆ Social Assistance was by far the strongest subsector in February, adding more jobs — 1,700 — than the other three subsectors combined. Regardless, every HC&SA subsector contributed positively to employment growth during the month.

## Data in Brief

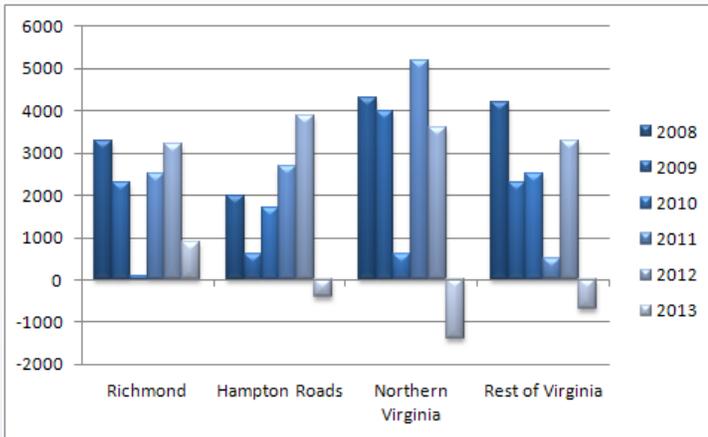
Not Seasonally Adjusted*	Employment, in Thousands				Growth Rate, Annualized		
	Feb.	Nov.	Jan.	Feb.	12 Month	3 Month	1 Month
<b>Virginia</b>							
Total Nonfarm	3,670.3	3,772.3	3,688.7	3,708.5	1.0%	-6.6%	6.6%
Health Care & Social Assistance	386.6	400.6	398.8	401.4	3.8%	0.8%	8.1%
<b>Virginia Beach, Norfolk, Newport News</b>							
Total Nonfarm	728.8	751.0	737.9	742.6	1.9%	-4.4%	7.9%
Health Care & Social Assistance	81.5	84.2	83.9	85.2	4.5%	4.8%	20.3%
<b>Northern Virginia</b>							
Total Nonfarm	1,332.0	1,372.4	1,350.4	1,348.2	1.2%	-6.9%	-1.9%
Health Care & Social Assistance	108.2	111.3	111.3	110.6	2.2%	-2.5%	-7.3%
<b>Richmond</b>							
Total Nonfarm	610.3	630.4	619.5	624.3	2.3%	-3.8%	9.7%
Health Care & Social Assistance	75.3	79.6	79.9	80.6	7.0%	5.1%	11.0%
<b>Rest of Virginia</b>							
Total Nonfarm	999.2	1,018.5	980.9	993.4	-0.6%	-9.5%	16.4%
Health Care & Social Assistance	121.6	125.5	123.7	125.0	2.8%	-1.6%	13.4%

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

February was a strong rebound month for Virginia's HC&SA sector. In total, 2,600 new jobs were added, which represents a one-month annualized growth rate of more than 8%. However, even after January's upward revision of 200 jobs, total employment in Virginia's HC&SA sector is still down by 1,600 jobs so far in 2013. Despite these early struggles, employment in



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

the sector has remained robust over the past 12 months with a growth rate of nearly 4%.

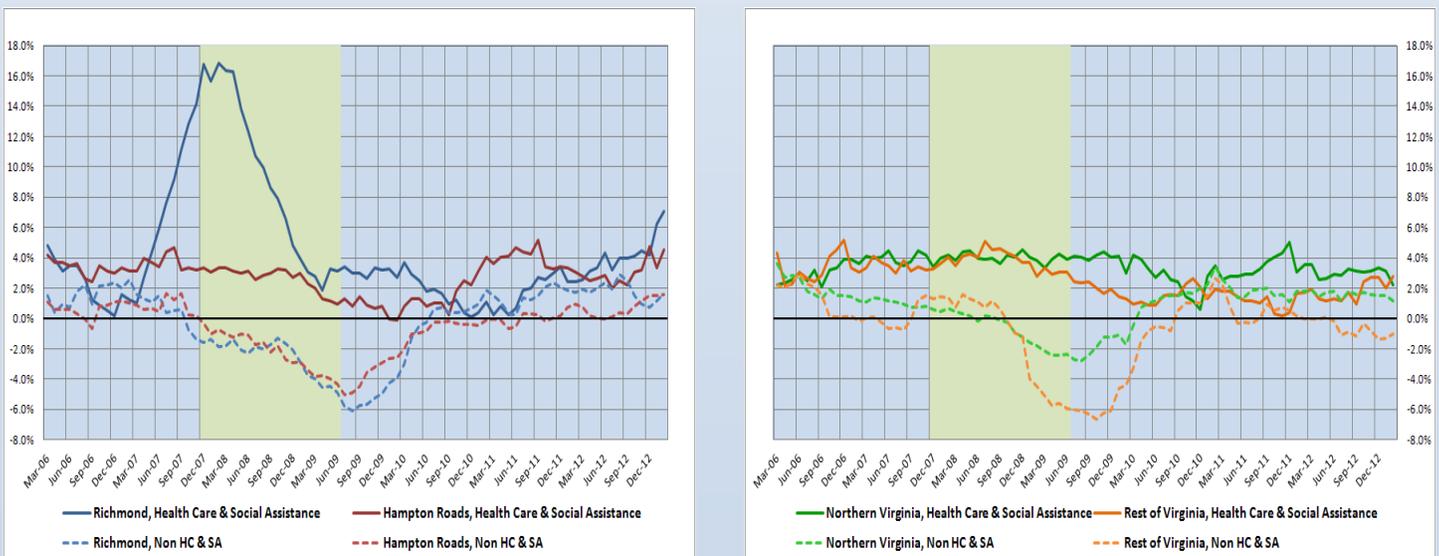
Regional trends that were exhibited in January continued this month as well. Despite the 1,300 jobs that were added in February in Hampton Roads, the region has seen a net job loss in its HC&SA sector in 2013. Meanwhile, the Rest of Virginia failed to produce enough new jobs to recover from January's losses, while Northern Virginia actually exacerbated its employment losses from the previous month. Only Richmond has seen positive HC&SA employment gains so far in 2013 by adding 900 jobs. Over the past 12 months, Richmond's HC&SA sector has been by far the strongest in the state, growing at a 7% annual rate. The next strongest region, Hampton Roads, has only grown at a 4.5% rate.

## Year-Over-Year Regional Employment Growth

After experiencing nearly stagnant year-over-year employment growth in the spring of 2011, Richmond's HC&SA sector has seen a remarkable turnaround and is now the fastest growth region in the state. In fact, although Richmond's HC&SA employment growth rate is still well below the temporary spike seen during the early months of the recession in 2007-2008, it is still growing at the faster rate of any other region in the state over the past decade.

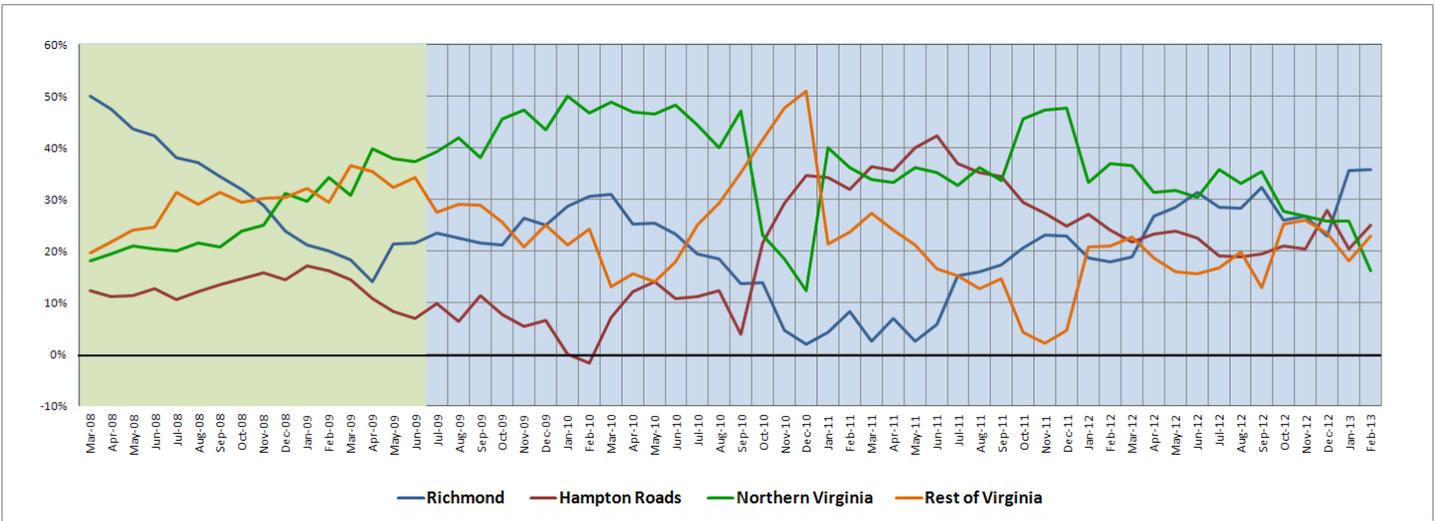
The other three regions of the state also experienced relatively robust long-term employment growth rates in their HC&SA sectors. Hampton Roads is currently experiencing growth of more than 4%, while both Northern Virginia and the Rest of Virginia have employment growth rates of more than 2%. Even more significantly, employment in the HC&SA sector is growing at a faster rate in every region in the state than its non-HC&SA counterpart.

**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.**

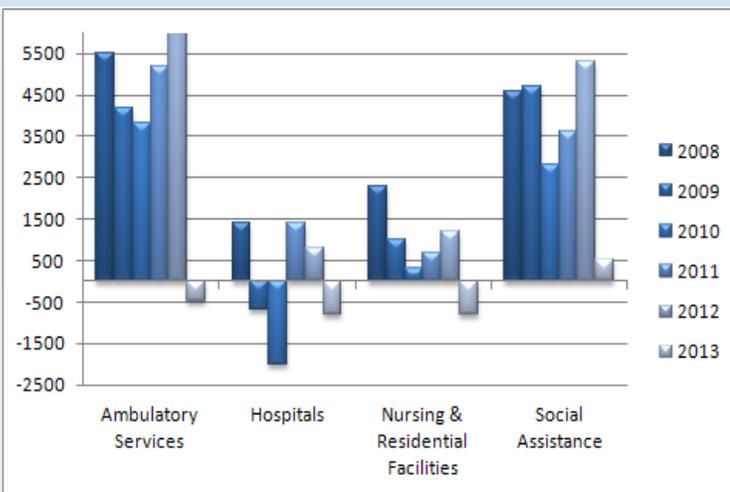


Richmond has been the most robust region in the state in terms of HC&SA employment growth, and has seen its share of 12-month employment growth rise in the past few months. Meanwhile, after losing 700 additional HC&SA jobs in February, Northern Virginia has seen its share of 12-month employment growth drop. Northern Virginia held the highest share throughout most of 2012, but now has the lowest share of 12-month employment growth in the state. This is the first time that Northern Virginia has been in this position since 2007. In fact, as recently as late 2011, Northern Virginia alone was responsible for nearly half of all 12-month employment growth in the HC&SA sector, but it now represents a share of just 16%.

## Subsector Employment Growth

In February, all four of Virginia’s HC&SA subsectors experienced employment gains, but three of these four subsectors have seen a net decrease in jobs over the first two months of the year. Only the Social Assistance subsector, which added 1,700 jobs in February, was able to overcome the substantial losses that the industry suffered in January and move into positive territory with a net addition of 500 new jobs for the year.

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



The Social Assistance subsector has seen particularly robust growth in recent months. In November, it overtook Nursing & Residential Care Facilities to become the third largest subsector in Virginia, and February’s results only solidified those gains. In addition, over the past year, the Social Assistance subsector has grown at a 10% rate, which represents its fastest year-over-year employment growth rate since 2008. Even more remarkably, no other HC&SA subsector has grown at such a rate in the past decade.

The other subsectors have also seen positive year-over-year employment growth, but those gains have been less robust overall, especially in the Hospitals and Nursing & Residential Care Facilities subsectors, where annual growth has been in the 1% range.

### Distribution of Growth by Subsector

Not Seasonally Adjusted	Employment, in Thousands				Growth Rate, Annualized		
	Feb. 2012	Nov. 2012	Jan. 2013	Feb. 2013	12 Month	3 Month	1 Month
<b>Virginia</b>							
Health Care & Social Assistance	386.6	400.6	398.8	401.4	3.8%	0.8%	8.1%
<i>Ambulatory Health Care Services</i>	151.3	157.8	157.6	158.1	4.5%	0.8%	3.9%
<i>Hospitals</i>	100.6	102.2	101.2	101.3	0.7%	-3.5%	1.2%
<i>Nursing &amp; Residential Care Facilities</i>	69.4	70.0	69.9	70.2	1.2%	1.1%	5.3%
<i>Social Assistance</i>	65.3	70.6	70.1	71.8	10.0%	7.0%	33.3%
<b>Virginia Beach, Norfolk, Newport News</b>							
Health Care & Social Assistance	81.5	84.2	83.9	85.2	4.5%	4.8%	20.3%
<i>Hospitals</i>	20.1	20.7	20.6	20.5	2.0%	-3.8%	-5.7%
<b>Northern Virginia</b>							
Health Care & Social Assistance	108.2	111.3	111.3	110.6	2.2%	-2.5%	-7.3%
<i>Ambulatory Health Care Services</i>	49.1	50.9	51.5	50.6	3.1%	-2.3%	-19.1%
<i>Hospitals</i>	23.3	23.0	22.7	22.6	-3.0%	-6.8%	-5.2%

Preliminary estimates are italicized

Although all four subsectors produced jobs in February, the HC&SA sector has been primarily driven by the Social Assistance subsector over the past year. February’s gains, which accounted for nearly two-thirds of all employment growth in the month, represented a one-month annualized growth rate of 33%. Relative to these gains, the other subsectors have grown slowly, especially in certain regions of the state. In Northern Virginia, the Ambulatory Health Care Services subsector lost 200 more jobs than the HC&SA sector as a whole. In addition, the Hospital subsector, although producing a modest statewide gain, lost ground in both Hampton Roads and Northern Virginia.

### Share of 12-Month Growth by Subsector

Although the Ambulatory Services subsector has retained the largest share of 12-month employment growth since mid-2010, the Social Assistance subsector has almost matched it. Together, these two subsectors account for almost all employment growth in Virginia’s HC&SA sector. Ambulatory Services has a 46% share, while Social Assistance is close behind at a 44% share. Meanwhile, Hospitals and Long-Term Care Facilities have been stable with under 5% employment growth share. With most of the movement occurring in Ambulatory Care and Social Assistance over the past year, their charts have become mirror-images of each other as they trade labor market share back and forth.

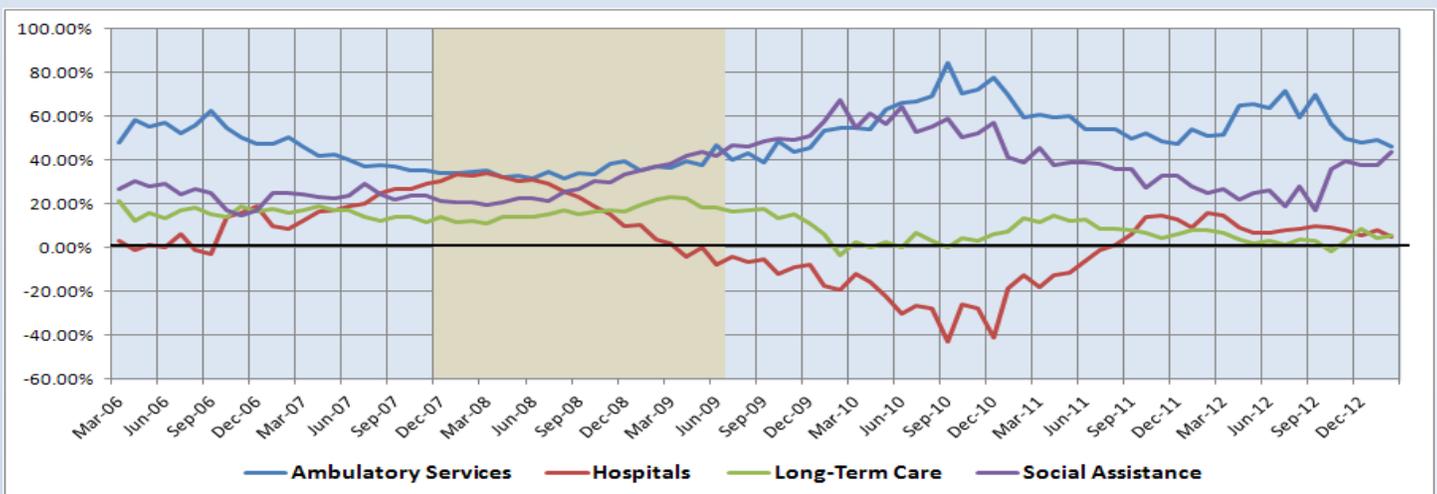
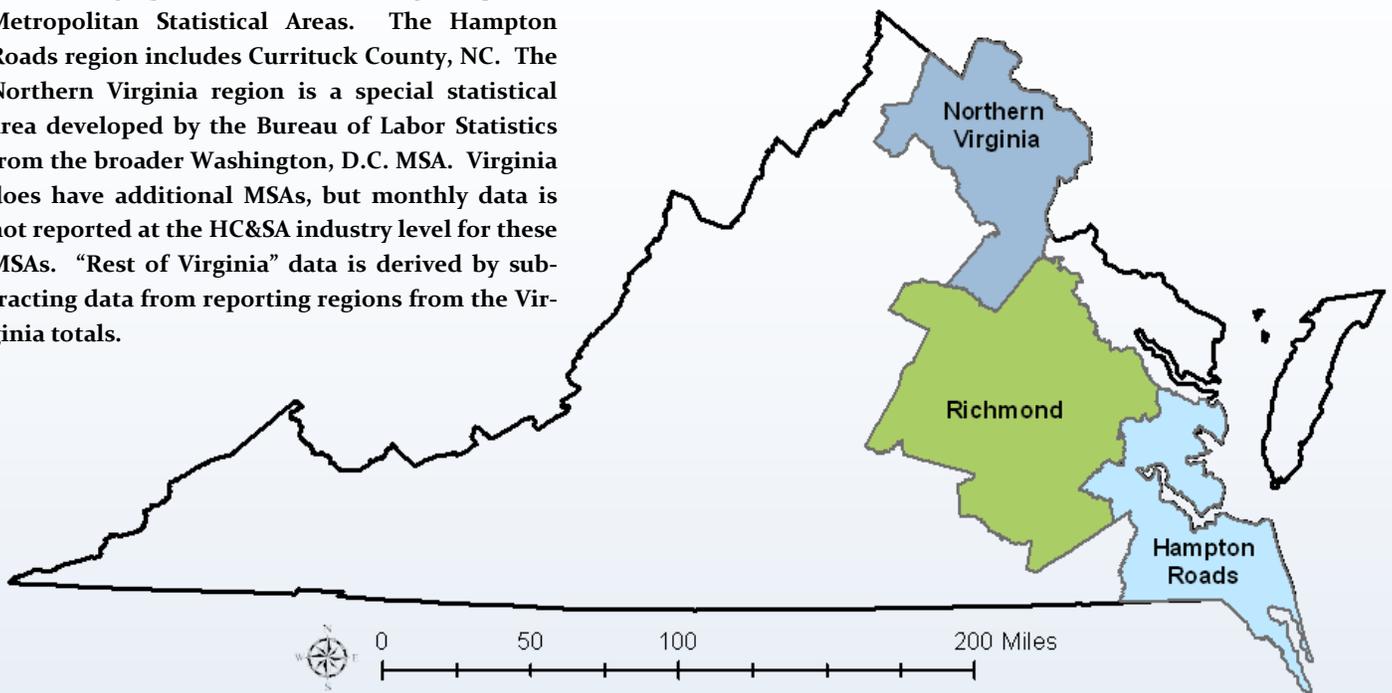


Figure 5: Share of Previous 12-Month Growth in Virginia’s HC&SA Subsectors (Not Seasonally Adjusted).

### 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>	
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			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)