



Virginia Healthcare Workforce Briefs

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

Series 2, Issue 22

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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.
- ◆ According to preliminary estimates, Virginia's HC&SA sector lost 100 jobs in October. Due to the government shutdown, there were no preliminary estimates for September, but final results indicate that 1,500 jobs were created. After an upward revision of 1,600 jobs, Virginia's HC&SA sector added 2,500 jobs in August.
- ◆ Northern Virginia added 300 jobs in October. Hampton Roads lost 800 jobs and Richmond lost 200 jobs. Year to date, Richmond and Hampton Roads have added a combined 4,400 HC&SA jobs, while Northern Virginia has lost 2,400 jobs.
- ◆ Three of Virginia's four HC&SA subsectors actually added jobs in October. The Social Assistance and Nursing & Residential Care Facilities subsectors each added 300 jobs, while the Hospitals subsector added 200 HC&SA jobs. The Ambulatory Health Care Services subsector lost 900 jobs in October.

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. 2012 | July 2013 | Sept. 2013 | Oct. 2013 | 12 Month | 3 Month | 1 Month |
| Virginia | | | | | | | |
| Total Nonfarm | 3,761.9 | 3,774.0 | 3,779.4 | 3,789.6 | 0.7% | 1.7% | 3.3% |
| Health Care & Social Assistance | 398.5 | 403.8 | 407.8 | 407.7 | 2.3% | 3.9% | -0.3% |
| Virginia Beach, Norfolk, Newport News | | | | | | | |
| Total Nonfarm | 747.9 | 771.4 | 765.6 | 759.3 | 1.5% | -6.1% | -9.4% |
| Health Care & Social Assistance | 83.8 | 87.4 | 87.9 | 87.1 | 3.9% | -1.4% | -10.4% |
| Northern Virginia | | | | | | | |
| Total Nonfarm | 1,365.1 | 1,377.3 | 1,369.6 | 1,369.6 | 0.3% | -2.2% | 0.0% |
| Health Care & Social Assistance | 110.8 | 110.9 | 109.3 | 109.6 | -1.1% | -4.6% | 3.3% |
| Richmond | | | | | | | |
| Total Nonfarm | 630.2 | 631.1 | 633.7 | 636.4 | 1.0% | 3.4% | 5.2% |
| Health Care & Social Assistance | 78.9 | 81.0 | 82.8 | 82.6 | 4.7% | 8.1% | -2.9% |
| Rest of Virginia | | | | | | | |
| Total Nonfarm | 1,018.7 | 994.2 | 1,010.5 | 1,024.3 | 0.5% | 12.7% | 17.7% |
| Health Care & Social Assistance | 125.0 | 124.5 | 127.8 | 128.4 | 2.7% | 13.1% | 5.8% |

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 HC&SA Employment Growth, Level

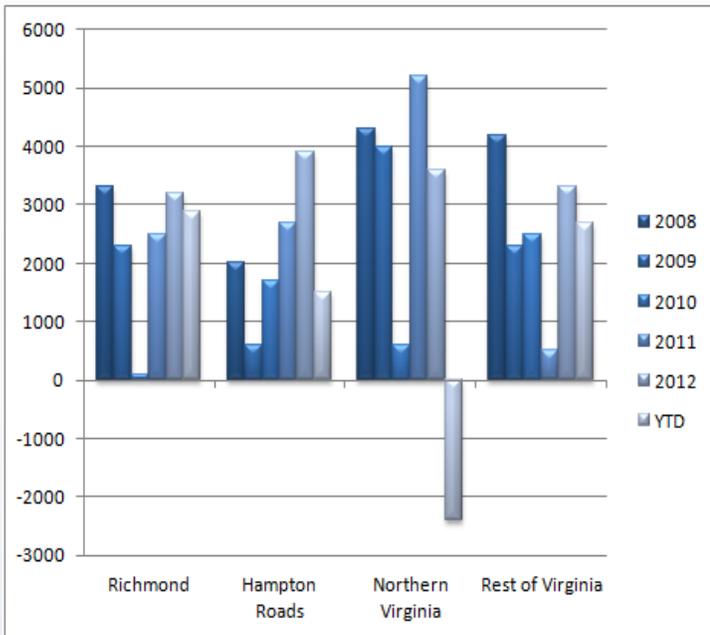


Figure 1: Annual Change in HC&SA Employment (Not Seasonally Adjusted, Change from Dec to Dec).

According to preliminary estimates, Virginia’s HC&SA sector lost 100 jobs in October. However, employment in Virginia’s HC&SA sector has picked up considerably over the past several months. Since August, Virginia’s HC&SA sector has added 3,900 jobs, which represents more than 80% of the 4,700 jobs that have been created so far this year.

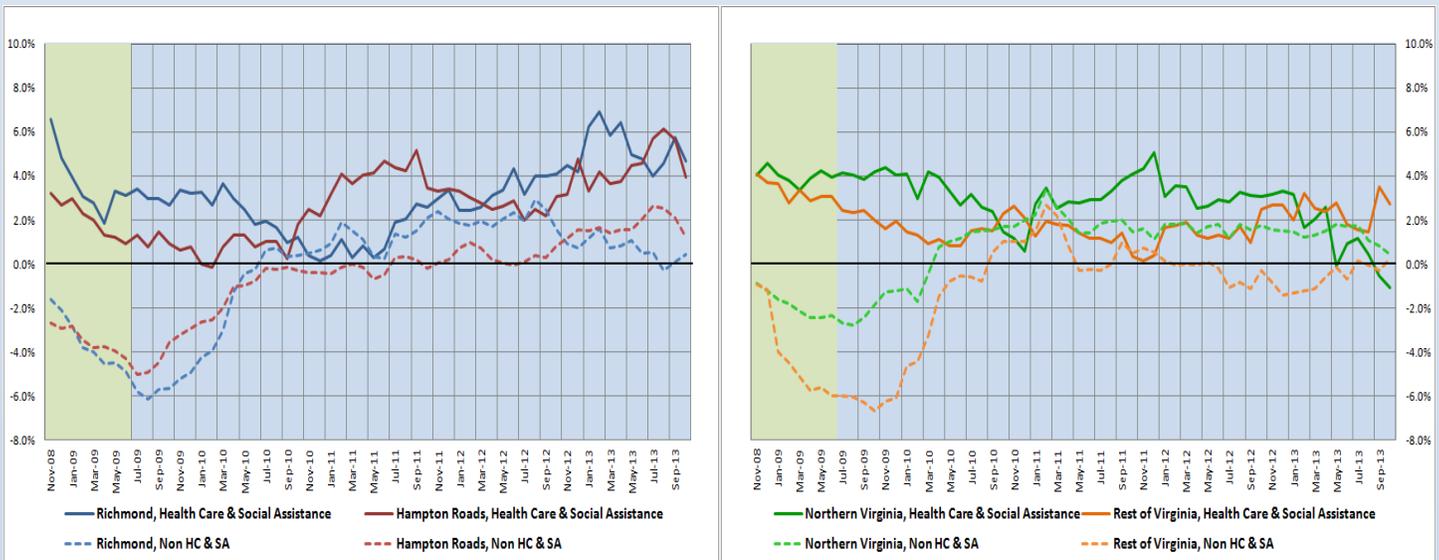
Rest of Virginia added 600 jobs, which was the largest gain in October. Northern Virginia also made a positive contribution, adding 300 jobs during the month. However, Hampton Roads lost 800 HC&SA jobs in October, while Richmond lost 200 jobs.

Since August, the Rest of Virginia has seen a dramatic reversal in its year-to-date HC&SA employment gains. Over the past three months, the Rest of Virginia has added 3,900 HC&SA jobs, more than compensating for the loss of 1,200 jobs during the first seven months of the year. Northern Virginia continues to be the laggard in terms of 2013 HC&SA employment. The region has lost 2,400 jobs so far this year, including 1,300 jobs over the past three months.

Year-Over-Year Regional Employment Growth

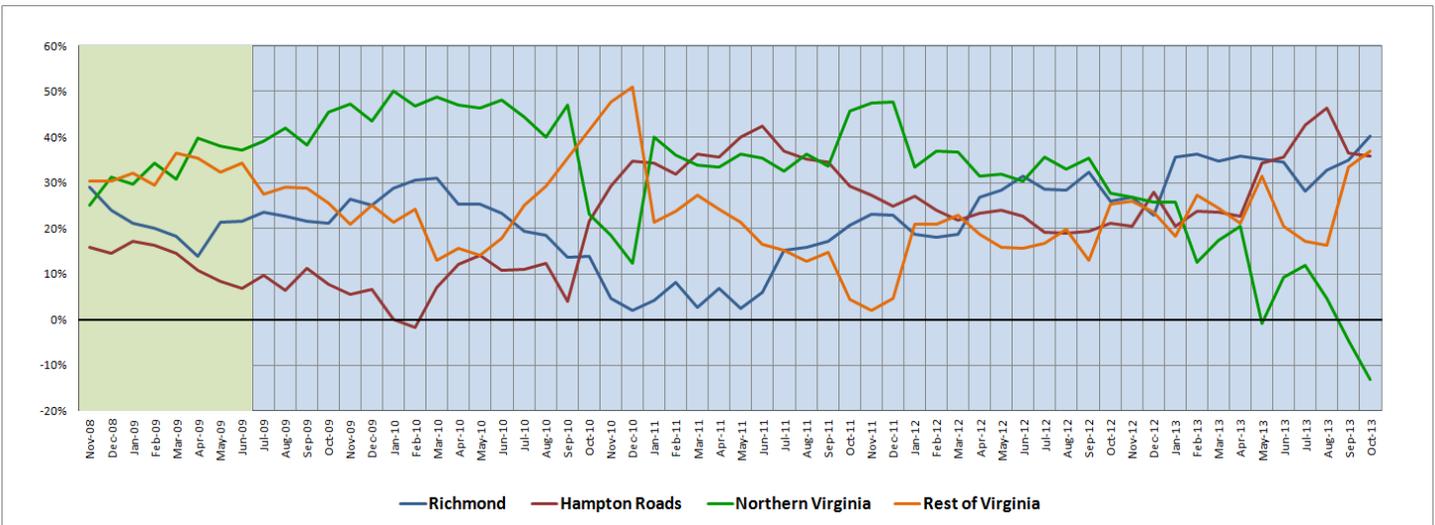
Every region of the state saw a decline in its year-over-year HC&SA employment growth rate in October. Three of these regions — Richmond, Hampton Roads, and the Rest of Virginia — are still experiencing faster growth in their HC&SA sectors relative to the rest of their respective regional economies. Richmond currently has a year-over-year HC&SA employment growth rate of 4.7%, while Hampton Roads is growing at a 3.9% year-over-year rate. Northern Virginia, on the other hand, has experienced its second-consecutive month in which its year-over-year HC&SA employment growth has been negative. Its current rate of -1.1% represents the slowest growth for the region’s HC&SA sector in more than a decade.

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



Regional Share of 12-month Growth

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



Since June, Hampton Roads had maintained the largest share of the previous 12-month employment growth in Virginia’s HC&SA sector, but the region was overtaken by both Richmond and the Rest of Virginia in October. Regardless, all three regions have seen a rapid convergence in their respective 12-month HC&SA employment growth shares in recent months. Currently, Richmond holds the largest share at 40% of the previous 12-month growth in Virginia’s HC&SA employment. Meanwhile, the Rest of Virginia has a 37% share and Hampton Roads is not far behind with a 36% share. Northern Virginia, on the other hand, has diverged considerably from the other three regions over the course of the past year. In fact, its 12-month HC&SA employment growth share has fallen from 26% at the beginning of the year to -13% in October.

Subsector Employment Growth

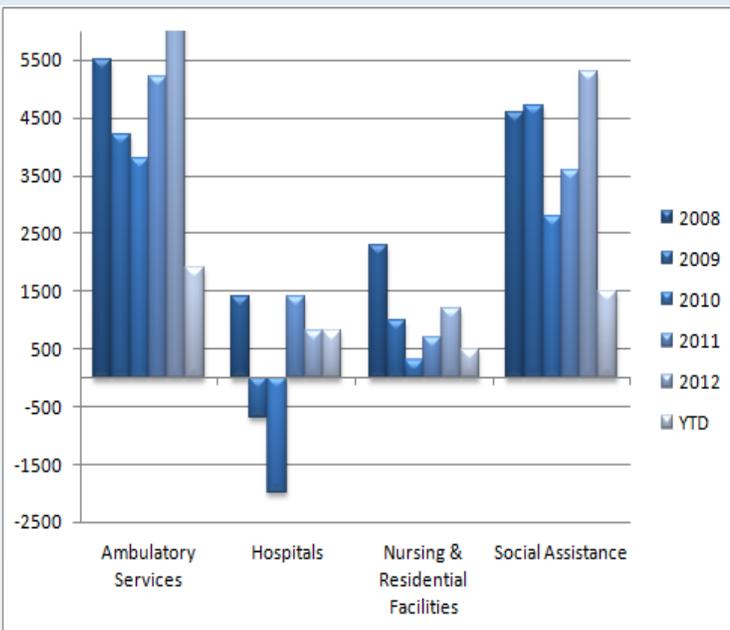


Figure 4: Annual & YTD Change in HC&SA Subsector Employment (Not Seasonally Adjusted, Dec. to Dec.)

In August, both the Nursing & Residential Care Facilities and the Social Assistance subsectors had experienced year-to-date declines in HC&SA employment, but these trends reversed themselves by October. Every HC&SA subsector in Virginia is now experiencing year-to-date increases in employment. The Social Assistance subsector has added 1,500 jobs so far in 2013, while Hospitals and Nursing & Residential Care Facilities have combined to add 1,300 jobs this year. The gains continue to be most pronounced in the Ambulatory Services subsector, which currently accounts for 40% of the year-to-date employment growth in Virginia’s HC&SA sector, but its year-to-date gains have been cut nearly in half since August.

Although every HC&SA subsector is on track for yearly employment gains, these gains are somewhat subdued relative to previous years. Total HC&SA employment growth has exceeded 10,000 jobs in each of the past two years, but year-to-date employment growth in 2013 has still not reached even half of this threshold.

Distribution of Growth by Subsector

| Not Seasonally Adjusted | Employment, in Thousands | | | | Growth Rate, Annualized | | |
|--|--------------------------|-----------|------------|-----------|-------------------------|---------|---------|
| | Oct. 2012 | July 2013 | Sept. 2013 | Oct. 2013 | 12 Month | 3 Month | 1 Month |
| Virginia | | | | | | | |
| Health Care & Social Assistance | 398.5 | 403.8 | 407.8 | 407.7 | 2.3% | 3.9% | -0.3% |
| <i>Ambulatory Health Care Services</i> | 157.8 | 159.9 | 161.4 | 160.5 | 1.7% | 1.5% | -6.5% |
| <i>Hospitals</i> | 102.1 | 102.6 | 102.7 | 102.9 | 0.8% | 1.2% | 2.4% |
| <i>Nursing & Residential Care Facilities</i> | 69.3 | 70.8 | 71.2 | 71.5 | 3.2% | 4.0% | 5.2% |
| <i>Social Assistance</i> | 69.3 | 70.5 | 72.5 | 72.8 | 5.1% | 13.7% | 5.1% |
| Virginia Beach, Norfolk, Newport News | | | | | | | |
| Health Care & Social Assistance | 83.8 | 87.4 | 87.9 | 87.1 | 3.9% | -1.4% | -10.4% |
| <i>Hospitals</i> | 20.6 | 21.3 | 21.5 | 21.6 | 4.9% | 5.8% | 5.7% |
| Northern Virginia | | | | | | | |
| Health Care & Social Assistance | 110.8 | 110.9 | 109.3 | 109.6 | -1.1% | -4.6% | 3.3% |
| <i>Ambulatory Health Care Services</i> | 51.1 | 50.6 | 50.1 | 50.2 | -1.8% | -3.1% | 2.4% |
| <i>Hospitals</i> | 22.9 | 22.5 | 22.4 | 22.4 | -2.2% | -1.8% | 0.0% |

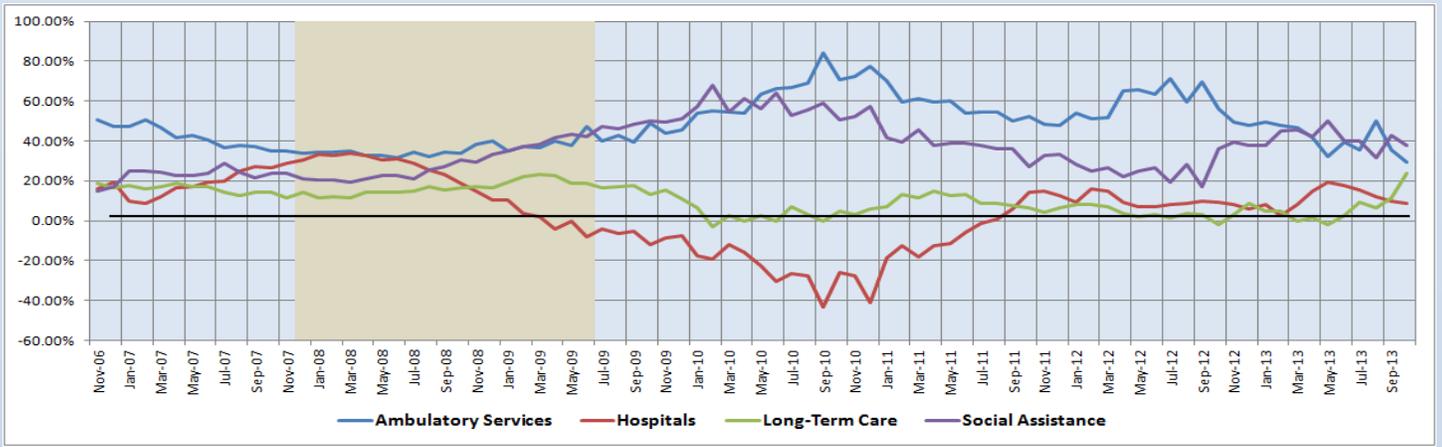
Preliminary estimates are italicized

Virginia’s HC&SA sector has grown at a healthy 2.3% year-over-year rate. This growth has accelerated during the past three months to a nearly 4.0% annualized rate. The Social Assistance subsector continues to be the most significant contributor to this growth over the past year, with a current 12-month growth rate of 5.1%. Meanwhile, the Nursing & Residential Care Facilities subsector has seen a strong uptick in year-over-year growth, reaching 3.2% in October. Although the Hospitals subsector has grown at a relatively anemic 0.8% annualized rate over the past 12 months, growth has been much stronger in the Hampton Roads region.

Share of 12-Month Growth by Subsector

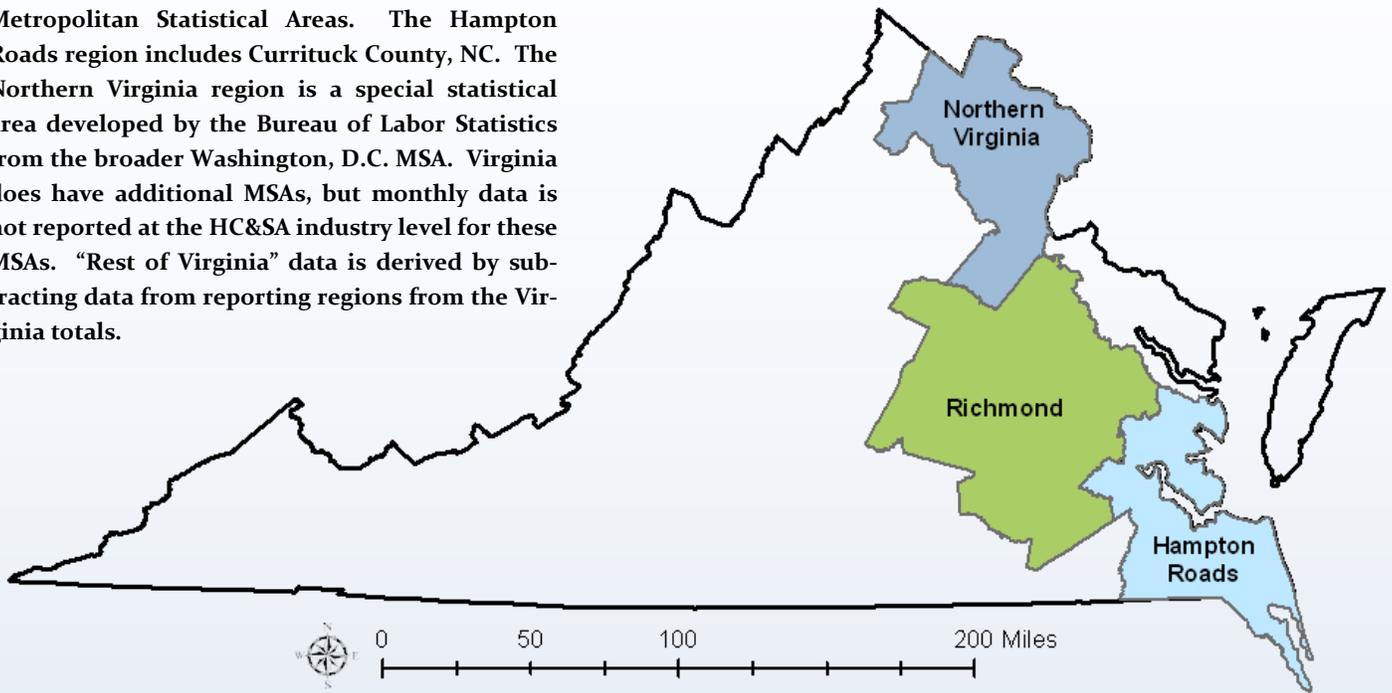
The Nursing & Residential Care Facilities subsector saw a significant increase in its share of 12-month HC&SA employment growth in October, increasing from 11.6% to 23.9% in just one month. The increase for the Nursing & Residential Care Facilities subsector has been even more dramatic since August, when its growth share was just 6.4%. Meanwhile, the other three HC&SA subsectors experienced declines of between 10% and 20% in their 12-month growth shares over the past month. Regardless, the Social Assistance subsector continues to retain the largest growth share at 38.0%, while the Ambulatory Health Care Services subsector came in second at 29.4%.

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 | | <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)