



# Virginia Healthcare Workforce Briefs

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

Series 2, Issue 21

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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 added 900 jobs in August. In addition, July's preliminary estimate for Virginia's HC&SA employment was revised upward by 400 jobs. With this revision, Virginia's HC&SA sector added 1,000 jobs in July.
- ◆ Regional HC&SA employment growth was concentrated in two regions: Hampton Roads and Richmond. Hampton Roads added 1,100 HC&SA jobs, while Richmond contributed 500 additional jobs. These two regions have also been responsible for more than 90% of all HC&SA job growth in Virginia over the past year.
- ◆ HC&SA job growth was driven entirely by an increase of 1,500 jobs in the Ambulatory Health Care Services subsector. Combined, the other three HC&SA subsectors lost 600 jobs. Over the past 12 months, Ambulatory Health Care Services has been responsible for half of all HC&SA job growth in Virginia.

*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.*

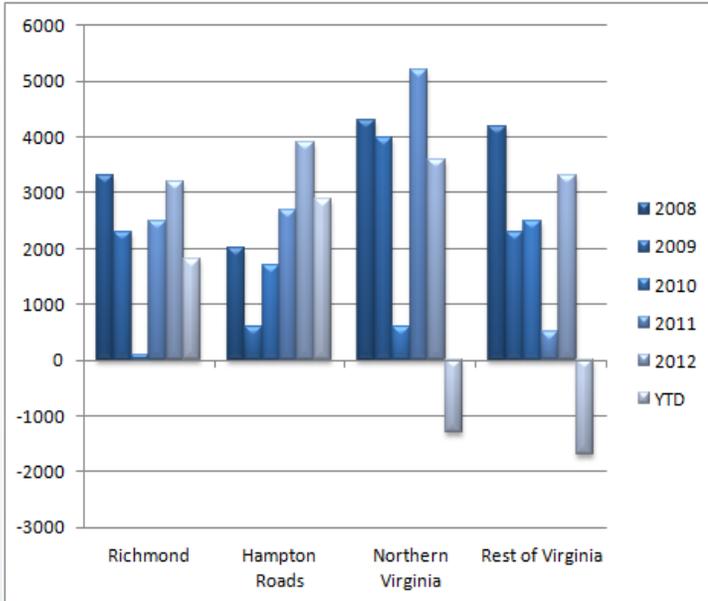
## Data in Brief

Not Seasonally Adjusted*	Employment, in Thousands				Growth Rate, Annualized		
	Aug. 2012	May 2013	July 2013	Aug. 2013	12 Month	3 Month	1 Month
<b>Virginia</b>							
Total Nonfarm	3,731.9	3,781.5	3,774.0	3,762.5	0.8%	-2.0%	-3.6%
Health Care & Social Assistance	395.3	401.7	403.8	404.7	2.4%	3.0%	2.7%
<b>Virginia Beach, Norfolk, Newport News</b>							
Total Nonfarm	750.9	758.2	771.4	773.9	3.1%	8.5%	4.0%
Health Care & Social Assistance	83.0	86.3	87.4	88.5	6.6%	10.6%	16.2%
<b>Northern Virginia</b>							
Total Nonfarm	1,358.1	1,376.2	1,377.3	1,371.5	1.0%	-1.4%	-4.9%
Health Care & Social Assistance	110.1	109.3	110.9	110.7	0.5%	5.2%	-2.1%
<b>Richmond</b>							
Total Nonfarm	627.8	634.4	631.1	628.6	0.1%	-3.6%	-4.7%
Health Care & Social Assistance	78.4	80.5	81.0	81.5	4.0%	5.1%	7.7%
<b>Rest of Virginia</b>							
Total Nonfarm	995.1	1,012.7	994.2	988.5	-0.7%	-9.2%	-6.7%
Health Care & Social Assistance	123.8	125.6	124.5	124.0	0.2%	-5.0%	-4.7%

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 added 900 jobs in August. In addition, July’s preliminary estimate for HC&SA employment growth was revised upward by 400 jobs. Virginia’s HC&SA sector has now experienced employment growth for three consecutive months, during which time 3,000 jobs have been added.

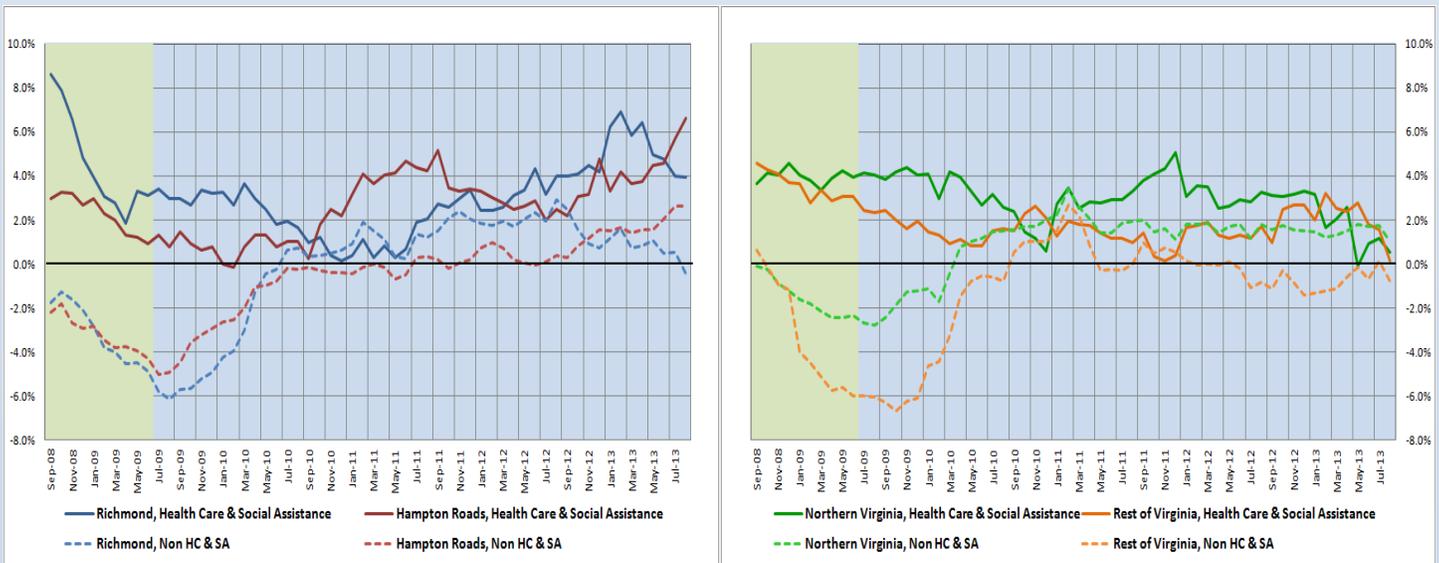
August’s gains were driven by job increases in two of Virginia’s four regions: Hampton Roads and Richmond. During the month, Hampton Roads added 1,100 HC&SA jobs, while Richmond increased its HC&SA payroll by 500 jobs. Meanwhile, the Rest of Virginia lost 500 HC&SA jobs, and Northern Virginia lost 200 jobs.

So far in 2013, HC&SA employment growth has also been concentrated in Hampton Roads and Richmond. These two regions have added a combined 4,700 jobs year to date. However, these gains were mitigated by HC&SA job losses in Northern Virginia and the Rest of Virginia. Year to date, these two regions have lost a total of 3,000 HC&SA jobs.

### Year-Over-Year Regional Employment Growth

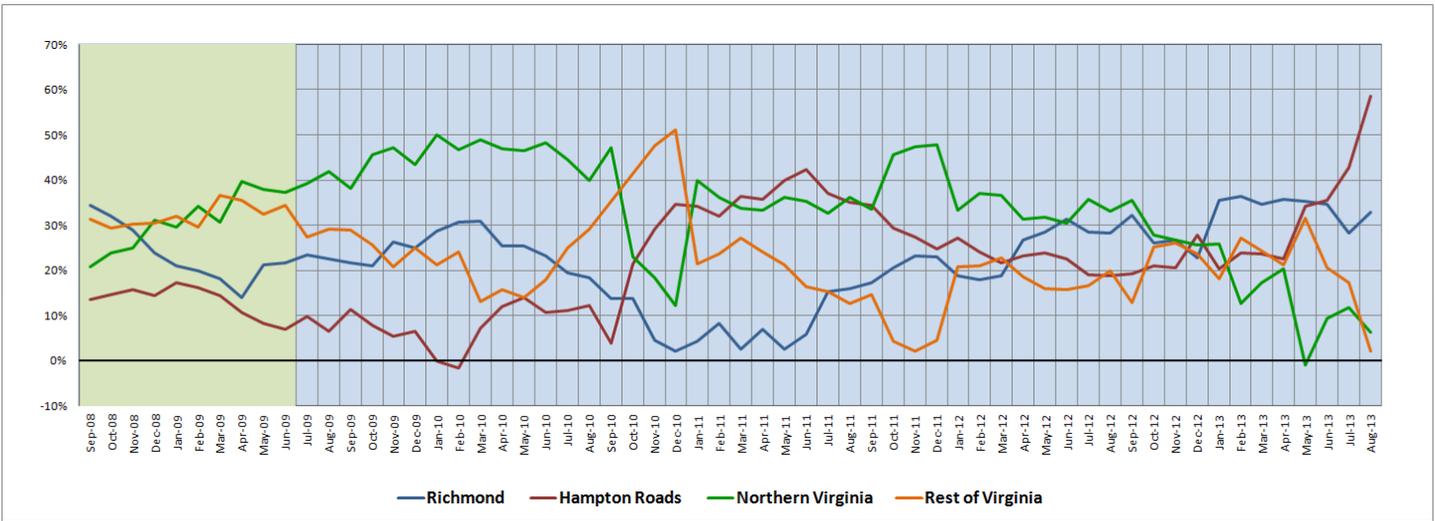
Over the past year, Virginia’s HC&SA sector has added 9,400 jobs, which represents a one-year annualized growth rate of 2.4%. Although this is still significantly above the 0.6% year-over-year employment growth rate in Virginia’s non-HC&SA sectors, August’s result represents the slowest one-year annualized growth rate for Virginia’s HC&SA sector in more than a year. However, Virginia’s overall growth rate masks considerable regional disparities in year-over-year employment growth rates. For instance, Hampton Roads’ HC&SA sector is currently growing at a 6.6% year-over-year rate, its highest level in more than a decade, while Richmond’s HC&SA sector is growing at a nearly 4% annualized rate. Meanwhile, the HC&SA sectors in both Northern Virginia and the Rest of Virginia currently have year-over-year growth rates of less than 1%.

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



### Regional Share of 12-month Growth

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

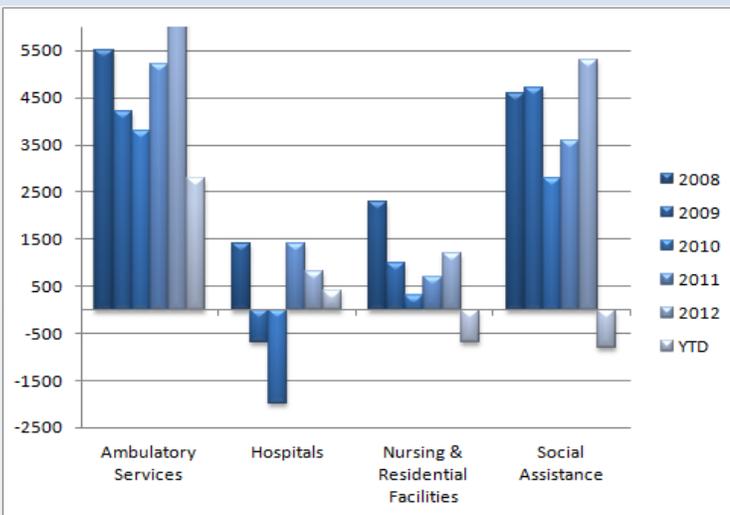


The dominant trend of 2013 with respect to HC&SA employment growth has been the rise of Hampton Roads as the fastest-growing region in Virginia. At the beginning of the year, Hampton Roads was responsible for just 20% of all HC&SA employment growth over the previous 12 months; only the Rest of Virginia had a lower growth share. However, in just eight months, Hampton Roads’ 12-month growth share has increased to 59%, an increase of 186%. In contrast, every other region in Virginia has seen its 12-month HC&SA employment growth share fall since January 2013. This decline has been most pronounced in Northern Virginia and the Rest of Virginia. Northern Virginia has seen its 12-month growth share fall by more than three-quarters in 2013, while the share that is attributable to the Rest of Virginia has fallen by nearly 90%.

### Subsector Employment Growth

In August, job growth was driven entirely by gains in the Ambulatory Health Care Services subsector, which added 1,500 HC&SA jobs during the month. No other subsector made a positive contribution to Virginia’s HC&SA employment in August. Nursing & Residential Care Facilities lost 500 jobs, while Hospitals experienced a drop in employment of 100 jobs. Meanwhile, the Social Assistance subsector managed to remain steady in August, with no change in employment.

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



Year to date, Virginia’s HC&SA sector has added 1,700 jobs, but these gains have been concentrated almost entirely in the Ambulatory Health Care Services subsector, which has added 2,800 jobs. The only other HC&SA subsector that has experienced year-to-date employment gains is Hospitals, which has added a relatively modest 400 jobs. The other two HC&SA subsectors, Nursing & Residential Care Facilities and Social Assistance, have combined to lose 1,500 jobs through the first eight months of 2013 and are on track to experience their first yearly declines in employment in more than five years. The decline is particularly noticeable in the Social Assistance subsector, which has been one of the main drivers of growth in Virginia’s HC&SA sector in recent years: Between 2008 and 2012, the subsector gained an average of 4,200 jobs per year.

### Distribution of Growth by Subsector

Not Seasonally Adjusted	Employment, in Thousands				Growth Rate, Annualized		
	Aug. 2012	May 2013	July 2013	Aug. 2013	12 Month	3 Month	1 Month
<b>Virginia</b>							
Health Care & Social Assistance	395.3	401.7	403.8	404.7	2.4%	3.0%	2.7%
<i>Ambulatory Health Care Services</i>	156.7	157.9	159.9	161.4	3.0%	9.2%	11.9%
<i>Hospitals</i>	101.2	102.0	102.6	102.5	1.3%	2.0%	-1.2%
<i>Nursing &amp; Residential Care Facilities</i>	70.1	69.5	70.8	70.3	0.3%	4.7%	-8.2%
<i>Social Assistance</i>	67.3	72.3	70.5	70.5	4.8%	-9.6%	0.0%
<b>Virginia Beach, Norfolk, Newport News</b>							
Health Care & Social Assistance	83.0	86.3	87.4	88.5	6.6%	10.6%	16.2%
<i>Hospitals</i>	20.5	21.1	21.3	21.4	4.4%	5.8%	5.8%
<b>Northern Virginia</b>							
Health Care & Social Assistance	110.1	109.3	110.9	110.7	0.5%	5.2%	-2.1%
<i>Ambulatory Health Care Services</i>	50.8	48.8	50.6	50.6	-0.4%	15.6%	0.0%
<i>Hospitals</i>	22.7	22.9	22.5	22.7	0.0%	-3.4%	11.2%

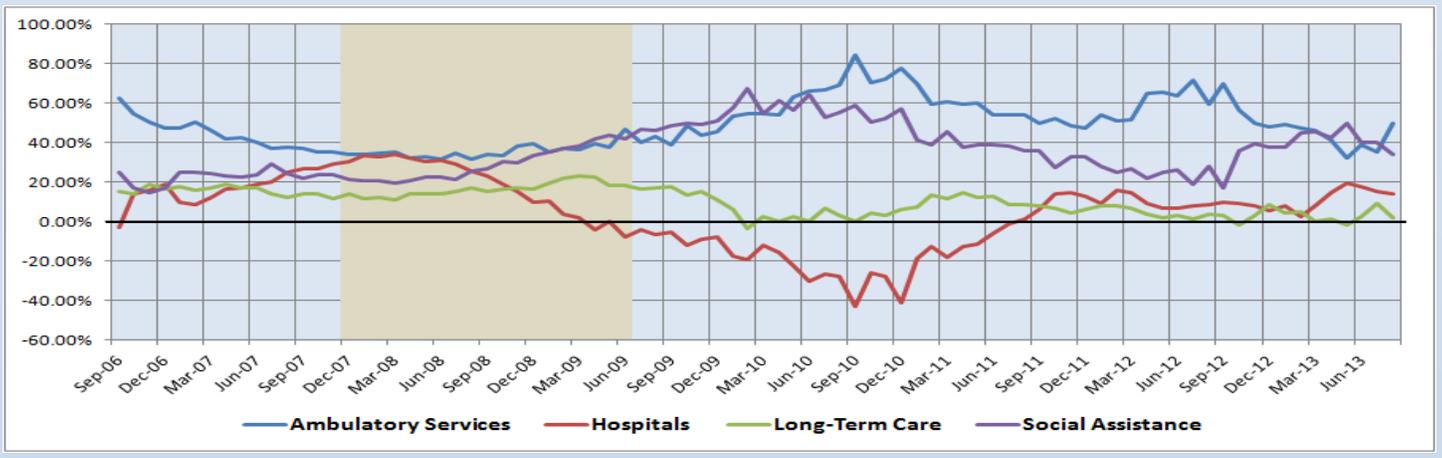
Preliminary estimates are italicized

Over the past 12 months, Virginia's HC&SA sector has grown at a healthy 2.4% annualized rate. This growth is attributable mainly to gains in the Social Assistance and the Ambulatory Health Care Services subsectors, both of which have grown at rates above the statewide average. Meanwhile, the Hospitals subsector is growing at just half the rate of Virginia's HC&SA sector, while Nursing & Residential Care Facilities have added only 200 jobs since last August. However, even these subsectors are doing better in faster growing regions of the state. For instance, the Hospitals subsector is growing at more than three times the statewide rate in Hampton Roads, which is currently the fastest-growing HC&SA region in Virginia.

### Share of 12-Month Growth by Subsector

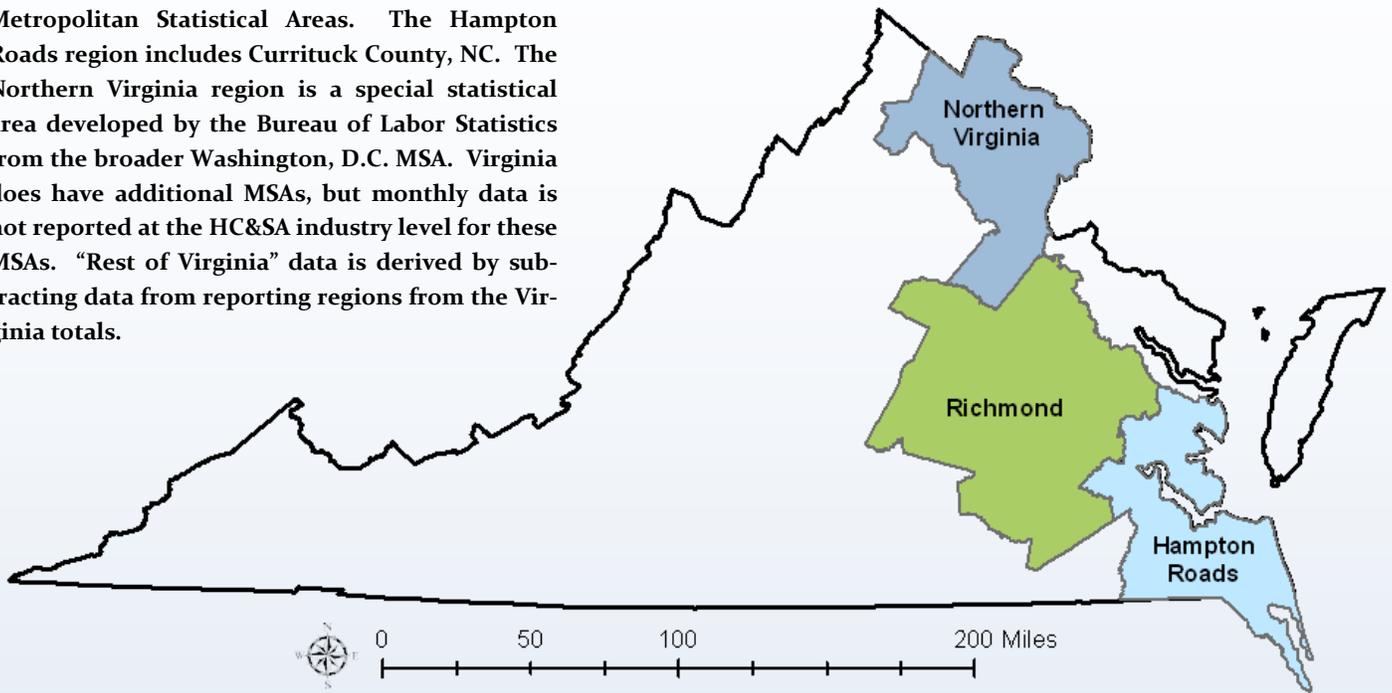
For most of the post-recessionary period, HC&SA employment growth has been attributable to gains in two subsectors: Ambulatory Health Care Services and Social Assistance. Through much of 2010, these two HC&SA subsectors had a combined 12-month growth share of more than 100%, thanks in large part to the anemic growth in Long-Term Care Facilities and Hospitals. This divergence in subsector growth share remains in 2013, although the trends have mitigated somewhat from the extremes seen three years ago. Currently, Ambulatory Health Care Services and Social Assistance are responsible for 84% of all HC&SA employment growth over the past year, with Hospitals responsible for most of the remaining growth.

**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

<b>Northern Virginia</b>		<b>Richmond</b>		<b>Hampton Roads</b>	
<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)