



Virginia Healthcare Workforce Briefs

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

Series 2, Issue 10

October 2012

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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.
- ◆ Based on preliminary estimates, Health Care & Social Assistance (HC&SA) payroll employment in Virginia's largest Metropolitan Statistical Areas (MSAs) decreased by 1,100 jobs when compared to August. Most of this decline was due to Hampton Roads, which lost 1,100 HC&SA jobs, while Northern Virginia lost 600 HC&SA jobs. However, Richmond and the Rest of Virginia both gained 300 HC&SA jobs during the month.
- ◆ August's preliminary estimates for HC&SA employment were revised downward in Richmond by 500 jobs and in Northern Virginia by 100 jobs. However, HC&SA employment was revised upward by 700 jobs in Hampton Roads.
- ◆ Statewide, Nursing/Residential Care Facilities lost 1,400 jobs during the month. However, these job losses were mitigated somewhat by gains of 200 jobs in Hospitals and 100 jobs in Social Assistance. Meanwhile, Ambulatory Services saw no net change in jobs in September.

Data in Brief

Not Seasonally Adjusted*	Employment, in Thousands				Growth Rate, Annualized		
	Sept. 2011	June 2012	Aug. 2012	Sept. 2012	12 Month	3 Month	1 Month
Virginia							
Total Nonfarm	3,690.4	3,763.1	3,715.1	3,722.2	0.9%	-4.3%	2.3%
Health Care & Social Assistance	385.5	392.9	395.3	394.2	2.3%	1.3%	-3.3%
Virginia Beach, Norfolk, Newport News							
Total Nonfarm	736.1	757.0	748.2	742.1	0.8%	-7.6%	-9.4%
Health Care & Social Assistance	80.4	82.0	83.2	82.1	2.1%	0.5%	-14.8%
Northern Virginia							
Total Nonfarm	1,330.6	1,372.3	1,355.9	1,359.2	2.1%	-3.8%	3.0%
Health Care & Social Assistance	106.8	109.3	109.5	108.9	2.0%	-1.5%	-6.4%
Richmond							
Total Nonfarm	609.7	623.1	615.8	614.1	0.7%	-5.6%	-3.2%
Health Care & Social Assistance	73.0	73.9	74.2	74.5	2.1%	3.3%	5.0%
Rest of Virginia							
Total Nonfarm	1,014.0	1,010.7	995.2	1,006.8	-0.7%	-1.6%	14.9%
Health Care & Social Assistance	125.1	127.7	128.4	128.7	2.9%	3.2%	2.8%

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 Employment Growth, Level

Employment in Virginia's HC&SA sector has grown by 6,400 jobs YTD. This is down 1,000 jobs from August, which was caused by a loss of 1,100 jobs in September combined with an upward revision of 100 jobs from August's preliminary estimates. September's job losses in the HC&SA sector represents a one-month annualized growth rate of -3.29%, which is the first time growth has turned negative since April. September also represents the worst one-month annualized growth rate in HC&SA employment since January.

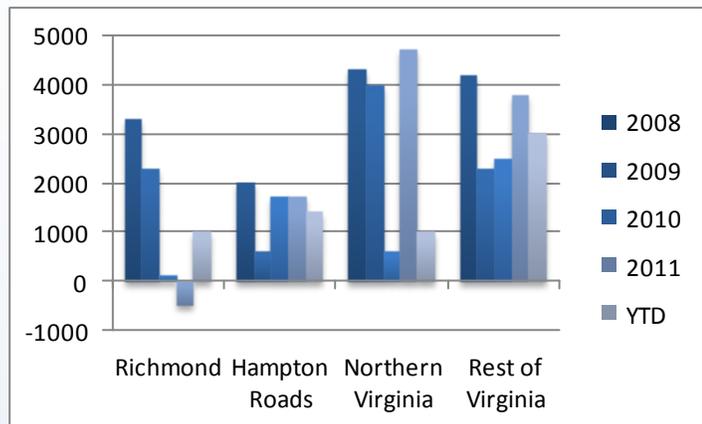


Figure 1: Annual Change in HC&SA Employment (Not Seasonally Adjusted, Change from Dec to Dec.)

Year over Year Regional Employment Growth

Over the past several months, year-over-year employment growth rates have been converging across Virginia's MSAs. Richmond, Hampton Roads and the Rest of Virginia all currently have year-over-year growth rates of between two and three percent, while Northern Virginia has a year-over-year growth rate of 1.97%. This represents a trend in which faster growing regions of the state like Northern Virginia and the Rest of Virginia have been slowing in recent months, while slow-growth regions like Richmond and Hampton Roads have been experiencing faster growth. For instance, year-over-year growth in the Rest of Virginia has fallen below 3% for the first time in more than a year. Meanwhile, Richmond's year-over-year growth rate climbed above 2% for the first time since May of 2010. In addition, despite weak job growth in Hampton Roads during the month, the year-over-year growth rate in HC&SA employment increased for the second consecutive month.

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.

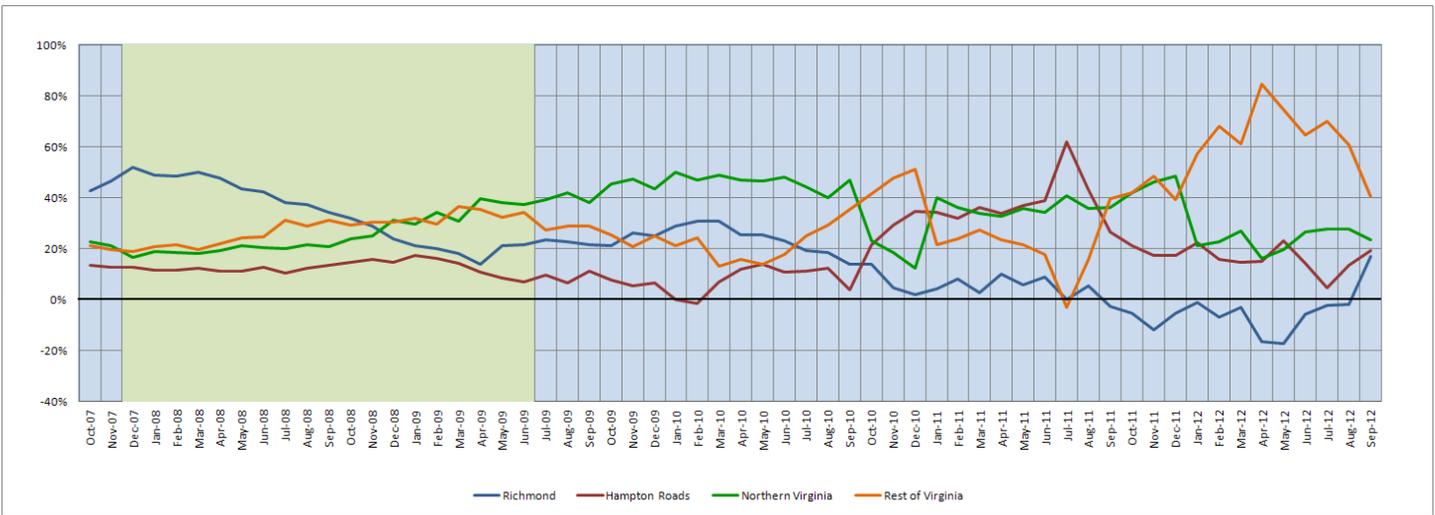
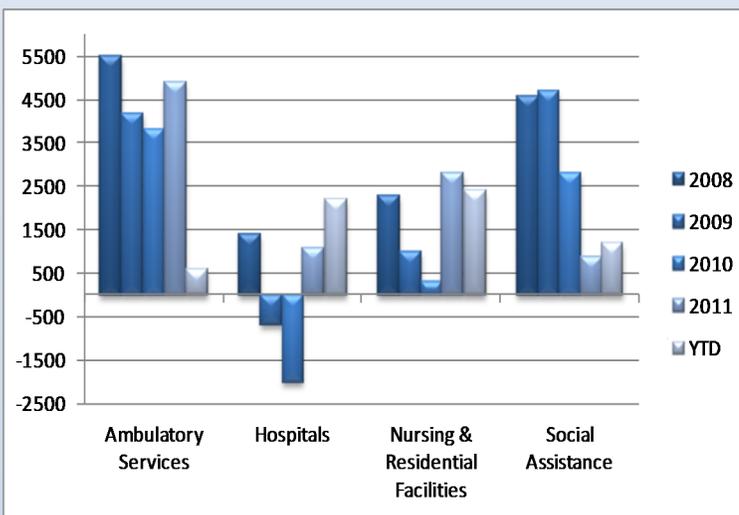


Figure 3 shows the distribution of new HC&SA sector jobs in the Commonwealth over the previous 12-month period. Results below 0% indicate job losses over the twelve month period, resulting in proportional gains for other areas. The Rest of Virginia continues to be the main driver of employment growth in the HC&SA sector over the previous 12 months, but its relative share is continuing to decline, a trend that began back in April when the area was responsible for more than 80% of all HC&SA job growth. Now, the Rest of Virginia is only responsible for approximately 40% of statewide job growth in the HC&SA sector. Virginia’s three MSAs — Richmond, Hampton Roads and Northern Virginia — each represent approximately 20% of HC&SA employment growth over the previous 12 months. Of these three regions, Richmond has seen the most dramatic increase in the growth of its employment share. After losing share for the past year, Richmond’s employment share turned positive in September with an increase to 16.85%.

Subsector Employment Growth, Level

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



In August, the Nursing & Residential Facilities subsector accounted for more than half of all YTD employment gains in the HC&SA sector. However, after losing 1,100 jobs in September, the Nursing subsector now has only added 2,400 jobs in 2012, which accounts for 38% of total YTD employment gains. Although the Nursing subsector is still the single biggest driver of HC&SA employment growth in Virginia, it is trailed closely by the Hospitals subsector, which added 200 jobs in September and 2,200 jobs YTD. Meanwhile, the Social Assistance and Ambulatory Services subsectors continue to lag behind in terms of employment growth, although both subsectors are still experiencing positive YTD employment gains. So far in 2012, the Social Assistance subsector has added 1,200 jobs, while the Ambulatory Services subsector has added 600 jobs.

Distribution of Growth by Subsector

Not Seasonally Adjusted	Employment, in Thousands				Growth Rate, Annualized		
	Sept. 2011	June 2012	Aug. 2012	Sept. 2012	12 Month	3 Month	1 Month
Virginia							
Health Care & Social Assistance	385.3	392.9	395.3	394.2	2.3%	1.3%	-3.3%
<i>Ambulatory Health Care Services</i>	150.1	152.5	152.2	152.2	1.4%	-0.8%	0.0%
<i>Hospitals</i>	100.6	101.4	103.0	103.2	2.6%	7.3%	2.4%
<i>Nursing & Residential Care Facilities</i>	71.4	74.2	75.7	74.3	4.1%	0.5%	-20.1%
<i>Social Assistance</i>	63.2	64.8	64.4	64.5	2.1%	-1.8%	1.9%
Virginia Beach, Norfolk, Newport News							
Health Care & Social Assistance	80.4	82.0	83.2	82.1	2.1%	0.5%	-14.8%
<i>Hospitals</i>	19.9	20.0	20.4	20.4	2.5%	8.2%	0.0%
Northern Virginia							
Health Care & Social Assistance	106.8	109.3	109.5	108.9	2.0%	-1.5%	-6.4%
<i>Ambulatory Health Care Services</i>	48.0	49.8	49.2	49.4	2.9%	-3.2%	5.0%
<i>Hospitals</i>	23.7	23.9	24.0	24.0	1.3%	1.7%	0.0%

Preliminary estimates are italicized

Virginia lost 1,100 HC&SA jobs in September, which represents a one-month annualized growth rate of -3.3%. These losses were concentrated entirely in the Nursing & Residential Care Facilities subsector, which lost 1,400 jobs during the month. This represents a one-month annualized growth rate of -20.1%. Two of the other three subsectors — Hospitals and Social Assistance — actually experienced small employment gains, while Ambulatory Services held steady from the previous month. Despite the significant losses in September, the Nursing & Residential Care Facilities subsector remained the strongest growing subsector over the past 12 months with growth in excess of four percent.

Share of HC&SA Employment by Subsector

For the first time since 2008, the three-month moving average in year-over-year employment growth for the Hospitals subsector eclipsed the equivalent growth rate in the Ambulatory Health Care Services subsector. Whereas the Hospitals subsector has rebounded from its lows in late 2010 when the three-month moving average in year-over-year employment growth nearly reached -2%, growth in the Ambulatory Health Care Services subsector has continued its long-term decline in employment growth. Meanwhile, the Social Assistance subsector appears to be rebounding from its own two-year slide in the three-month moving average of year-over-year employment growth.

After briefly flirting with negative territory earlier in the year, growth has now returned to 1.58% in September. As for Nursing & Residential Care Facilities, it continues to remain the fastest grower among all subsectors despite a dip below six percent during the current month.

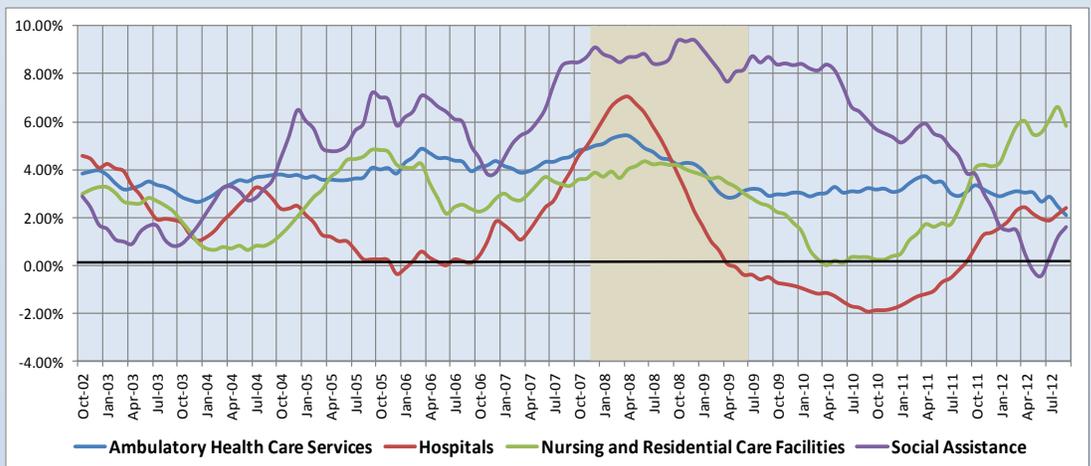
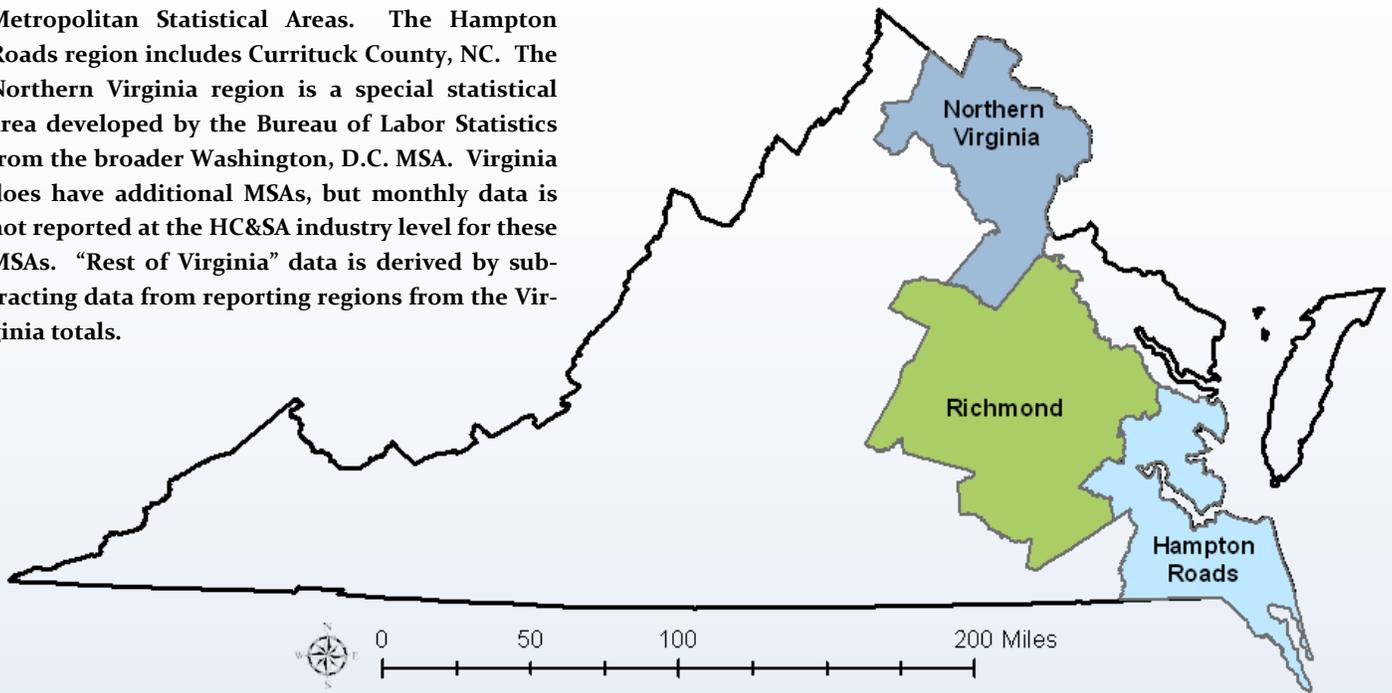


Figure 5: Year-Over-Year Change in Employment, 3-Month Moving Average

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			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/.

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)