



Virginia Healthcare Workforce Briefs

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

Series 2, Issue 8

August 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) increased slightly, gaining 200 jobs when compared to June. Hampton Roads gained 300 jobs, but Richmond lost 100 jobs. There was no net job change in Northern Virginia.
- ◆ June's preliminary estimates were revised upward by 700 jobs in both Hampton Roads and Northern Virginia. However, Richmond saw no change in its estimate.
- ◆ The Rest of Virginia's HC&SA sector remained level in July according to preliminary estimates. Rural and small metro areas of Virginia have captured 72% of HC&SA job gains in the past 12 months.
- ◆ Statewide, both Ambulatory Services and Nursing & Residential Facilities gained 600 jobs. However, Social Assistance lost 600 jobs, and Hospitals lost 400 jobs.

Data in Brief

Not Seasonally Adjusted*	Employment, in Thousands				Growth Rate, Annualized		
	June 2011	Apr. 2012	June 2012	July 2012	12m Growth	3m growth, annualized	1m growth, annualized
Virginia							
Total nonfarm	3672.7	3720.1	3763.1	3738.1	1.8%	1.9%	-7.7%
Health Care & Social Assistance	381.8	390.4	392.9	393.1	3.0%	2.8%	0.6%
Virginia Beach, Norfolk, Newport News							
Total nonfarm	747.0	739.3	757.0	754.0	0.9%	8.2%	-4.7%
Health Care & Social Assistance	81.8	81.5	82.0	82.3	0.6%	4.0%	4.5%
Northern Virginia							
Total nonfarm	1,330.0	1,345.7	1,372.3	1,362.2	2.4%	5.0%	-8.5%
Health Care & Social Assistance	106.3	107.6	109.3	109.3	2.8%	6.5%	0.0%
Richmond							
Total Nonfarm	610.3	615.2	623.1	617.3	1.1%	1.4%	-10.6%
Health Care & Social Assistance	74.1	72.8	73.9	73.8	-0.4%	5.6%	-1.6%
Rest of Virginia							
Total nonfarm	985.4	1,019.9	1,010.7	1,004.6	1.9%	-5.9%	-7.0%
Health Care & Social Assistance	119.6	128.5	127.7	127.7	6.8%	-2.5%	0.0%

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 5,300 jobs YTD, an annualized rate of 2.35% (See HWDC Workforce Briefing Series 1: **State & National Employment** for more robust seasonally-adjusted data). By comparison, the national HC&SA sector has grown at an annualized rate of 1.17% through July. Virginia's strong YTD performance was aided by upward revisions in Virginia's June HC&SA employment estimates and a preliminary decrease in national health care employment.

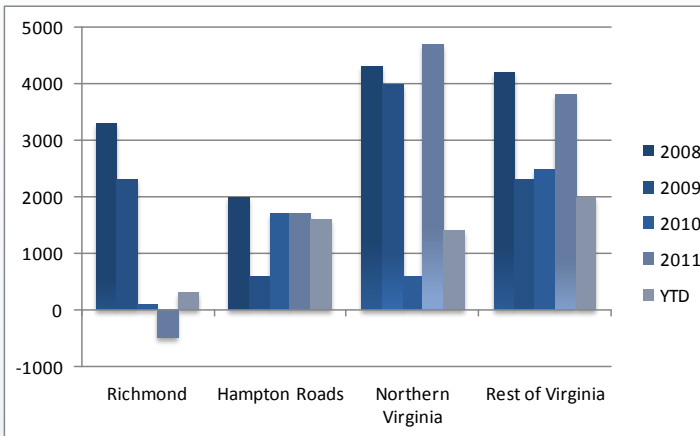


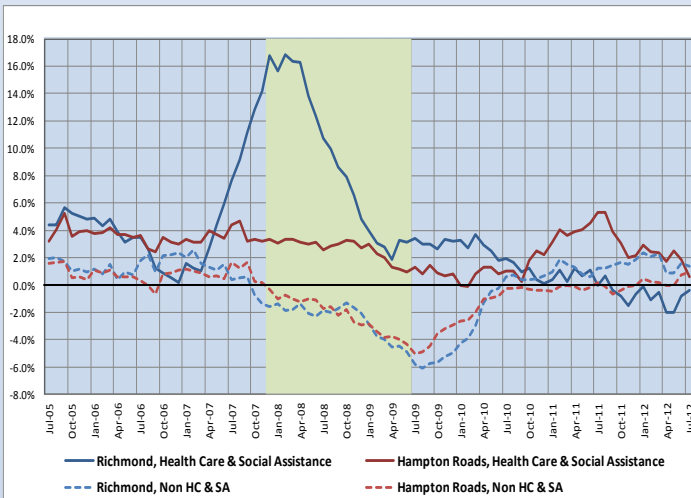
Figure 1: Annual Change in HC&SA Employment (Not Seasonally Adjusted, change from Dec to Dec.)

Year over Year Regional Employment Growth

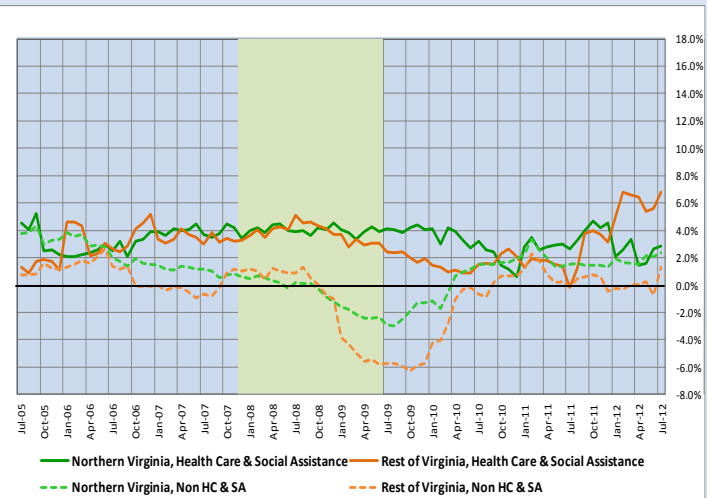
For the first time in more than seven years, HC&SA employment growth in Hampton Roads dropped below the growth rate of non-HC&SA sectors. After peaking in August of 2011 with a YOY growth rate of 5.28%, employment growth has fallen precipitously to just 0.61% in July. YOY HC&SA employment growth remained negative in Richmond, continuing a trend that began in September of 2011. However, there has been modest improvement in these numbers since May, and Richmond may return to positive growth later this year if the present trend continues. The most impressive HC&SA employment growth remains fairly concentrated in Northern Virginia and the Rest of Virginia. In Northern Virginia, YOY HC&SA employment growth increased yet again to 2.82%, which remains above the growth rate in non-HC&SA sectors. Meanwhile, YOY HC&SA job growth surged in the Rest of Virginia to 6.77%, nearly breaking a high set in February.

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

Richmond & Hampton Roads



Northern Va. & Rest of Virginia



Regional Share of 12-month Growth

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

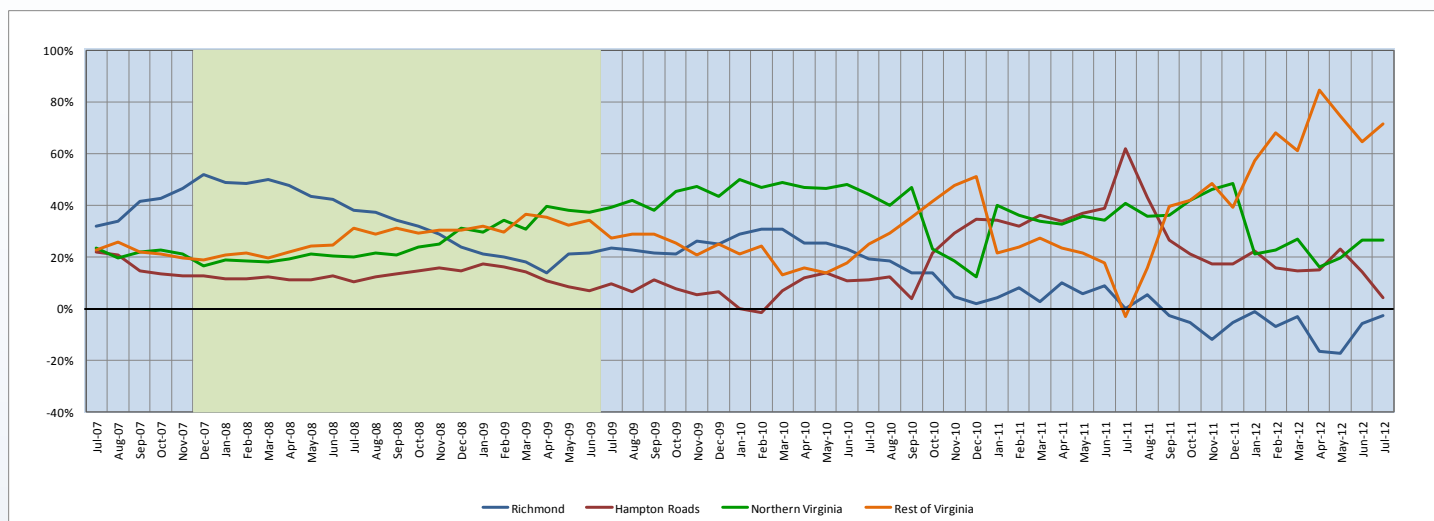
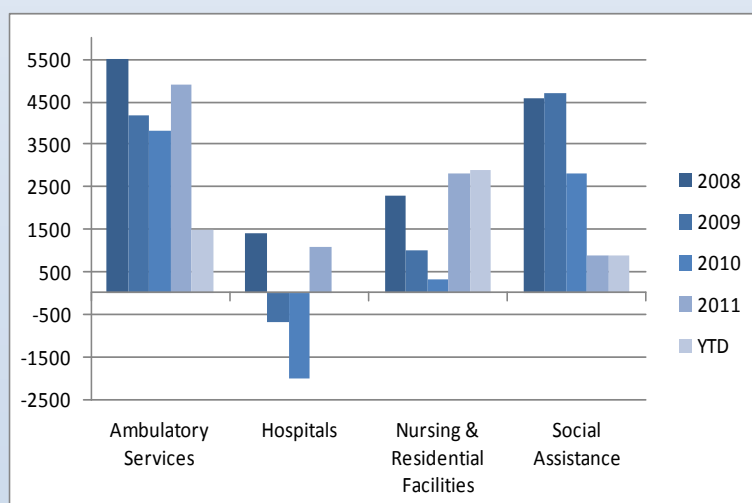


Figure 3 shows the distribution of new HC&SA sector jobs in the Commonwealth over the previous 12-month period. Results below 0% indicate job losses over the twelve month period, resulting in proportional gains for other areas. Although the Rest of Virginia (areas outside of Virginia's three largest MSAs) continues to benefit from significant HC&SA employment growth in 2012, the region saw its share of 12-month job growth decrease to 71.68 percent in July. Northern Virginia was the prime beneficiary of this trend, increasing its share to 26.55 percent. Richmond remains negative for the year, but its relative share of HC&SA employment growth improved in July, increasing from -5.8% to just -2.65%. However, Hampton Roads has continued its recent slide in share, which fell to just 4.42% during the month.

Subsector Employment Growth, Level

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



Although Virginia's HC&SA sector has grown by 5,300 jobs since the beginning of the year, the distribution of those jobs across subsectors varies considerably. Job growth in Nursing & Residential Facilities has been strong in 2012; in fact, growth in this sector currently accounts for more than half of all job growth for the year. Ambulatory Services is the second-fastest subsector for job growth in Virginia, accounting for 28% of total jobs created so far in 2012. Social Assistance has also contributed to job growth in 2012. However, the Hospital subsector continues to remain a soft spot in Virginia's HC&SA sector. After losing 400 jobs in July, Hospitals have now produced no net jobs for the year. This has continued a trend of lackluster performance in the Hospital subsector ever since the most recent recession hit the economy in late 2007. Hospitals have lost jobs in two of the past four years.

Distribution of Growth by Subsector

Not Seasonally Adjusted	Employment, in Thousands				Growth Rate, Annualized		
	July 2011	Apr. 2012	June 2012	July 2012	12m Growth	3m growth, annualized	1m growth, annualized
Virginia							
Health Care & Social Assistance	381.8	390.4	392.9	393.1	3.0%	2.8%	0.6%
<i>Ambulatory Health Care Services</i>	148.4	152.0	152.5	153.1	3.2%	2.9%	4.8%
<i>Hospitals</i>	99.8	101.6	101.4	101.0	1.2%	-2.3%	-4.6%
<i>Nursing & Residential Care Facilities</i>	70.1	73.2	74.2	74.8	6.7%	9.0%	10.1%
<i>Social Assistance</i>	63.5	63.6	64.8	64.2	1.1%	3.8%	-10.6%
Virginia Beach, Norfolk, Newport News							
Health Care & Social Assistance	81.8	81.5	82.0	82.3	0.6%	4.0%	4.5%
<i>Hospitals</i>	20.1	20.1	20.0	20.0	-0.5%	-2.0%	0.0%
Northern Virginia							
Health Care & Social Assistance	106.3	107.6	109.3	109.3	2.8%	6.5%	0.0%
<i>Ambulatory Health Care Services</i>	47.1	48.6	49.8	49.7	5.5%	9.4%	-2.4%
<i>Hospitals</i>	23.9	23.7	23.9	23.9	0.0%	3.4%	0.0%

Preliminary estimates are italicized

Job gains in the HC&SA sector in July were concentrated in the Ambulatory Health Care Services and Nursing & Residential Care Facilities subsectors. Both of those subsectors gained 600 jobs, which helped to offset the combined 1,000 jobs that were lost in the Hospitals and Social Assistance subsectors. Despite these monthly losses, however, all subsectors have seen employment gains over the past 12 months, but much of that growth has been concentrated in Ambulatory Health Care Services and Nursing & Residential Care Facilities. Revisions for June were somewhat larger than May. Most dramatically, the preliminary estimate for Ambulatory Health Care Services was revised upward by 900 jobs.

Share of HC&SA Employment by Subsector

The share of HC&SA employment among across subsectors remained relatively stable in July. Perhaps most significantly, YOY employment growth swung positive again for the social assistance subsector, but the long-term slide in social assistance employment that began soon after the most recent recession ended has still not been abated. The other subsector that contributed most to employment growth during the recession, Hospitals, also remains mired in an employment slump, but growth has remained positive since September of 2011. Employment growth in Ambulatory Health Care Services has remained relatively stable over the past year. In fact, over the past seven years, YOY job growth in this subsector has never fallen below two percent. The subsector that has seen the most employment growth in 2012 has been Nursing and Residential Care Facilities, which has rebounded impressively from the stagnating growth rates of 2010. For July, YOY job growth increased to nearly six percent in this subsector.

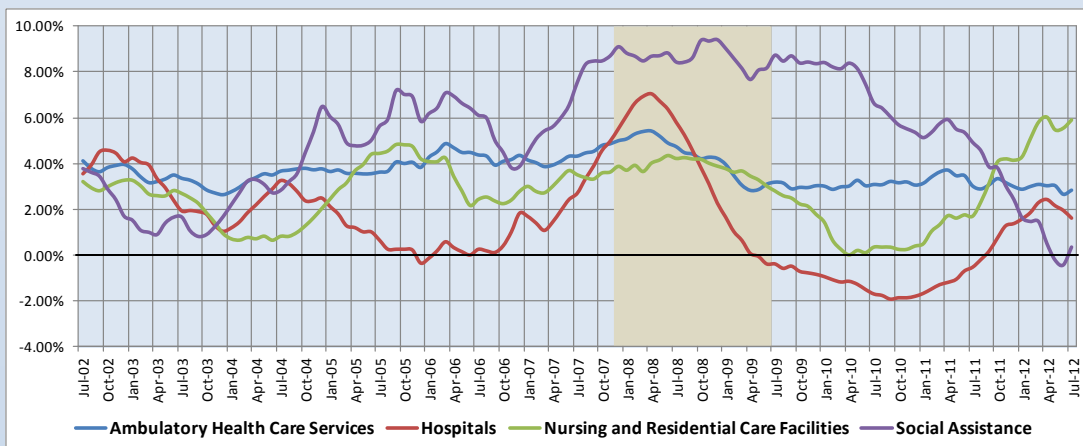
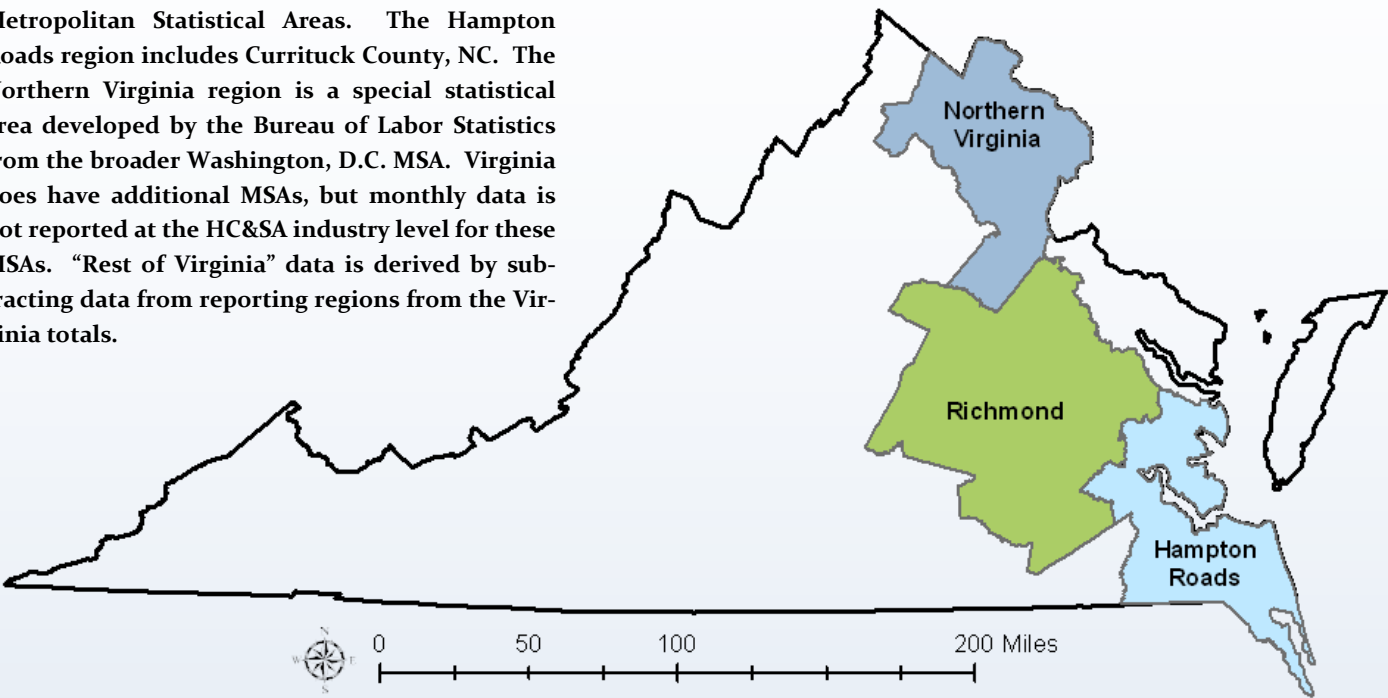


Figure 5: Year-over-year change in employment, 3-month moving average

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	
Northern VA, (Non-standard CES Area 94783)		Richmond, VA (MSA 40060)		Virginia Beach-Norfolk-Newport News, VA-NC (MSA 47260)	
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			Williamsburg
		King & Queen		Currituck, NC	
		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).