



Virginia Healthcare Workforce Briefs

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

Series 2, Issue 7

July 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) was level, neither gaining nor losing jobs in June. Northern Virginia gained 200 jobs and Richmond gained 900 jobs, but Hampton Roads lost 1,100 jobs.
- ◆ May's preliminary estimates were revised upward by 200 jobs in Richmond, and downward by 600 jobs in Hampton Roads and 100 jobs in Northern Virginia.
- ◆ The Rest of Virginia's HC&SA sector gained 1,600 jobs in June according to preliminary estimates. Rural and small metro areas of Virginia have captured 78% of HC&SA job gains in the past 12 months.
- ◆ Statewide, Ambulatory Services lost 1,400 jobs. Nursing & Residential Facilities gained 1,700 jobs, Social Assistance gained 1,100 jobs & Hospitals gained 200 jobs.

Data in Brief

Not Seasonally Adjusted*	Employment, in Thousands				Growth Rate, Annualized		
	May 2011	Feb 2012	Apr 2012	May 2012	12m Growth	3m growth, annualized	1m growth, annualized
Virginia							
Total Nonfarm	3720.1	3694	3743.2	3764.9	1.2%	7.9%	7.2%
Health Care & Social Assistance	382.4	390.9	391.2	392.8	2.7%	2.0%	5.0%
Virginia Beach, Norfolk, Newport News							
Total Nonfarm	750.6	731.5	745.5	756.4	0.8%	14.3%	19.0%
Health Care & Social Assistance	80.5	81.5	82.4	81.3	1.0%	-1.0%	-14.9%
Northern Virginia							
Total Nonfarm	1,343.5	1,337.4	1,360.3	1,371.3	2.1%	10.5%	10.1%
Health Care & Social Assistance	106.5	108.5	108.4	108.6	2.0%	0.4%	2.2%
Richmond							
Total Nonfarm	615.3	615.8	617.5	623.4	1.3%	5.0%	12.1%
Health Care & Social Assistance	74.5	73.2	73.0	73.9	-0.8%	3.9%	15.8%
Rest of Virginia							
Total Nonfarm	1,010.7	1,009.3	1,019.9	1,013.8	0.3%	1.8%	-6.9%
Health Care & Social Assistance	120.9	127.7	127.4	129.0	6.7%	4.1%	16.2%

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 5,000 jobs YTD, an annualized rate of 2.59% (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 1.70% through June. Virginia's strong YTD performance was aided by upward revisions in Virginia's May HC&SA employment estimates, and downward revisions in national figures.

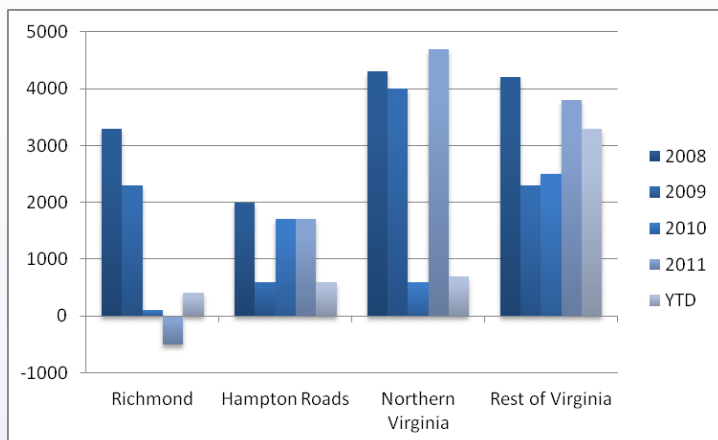


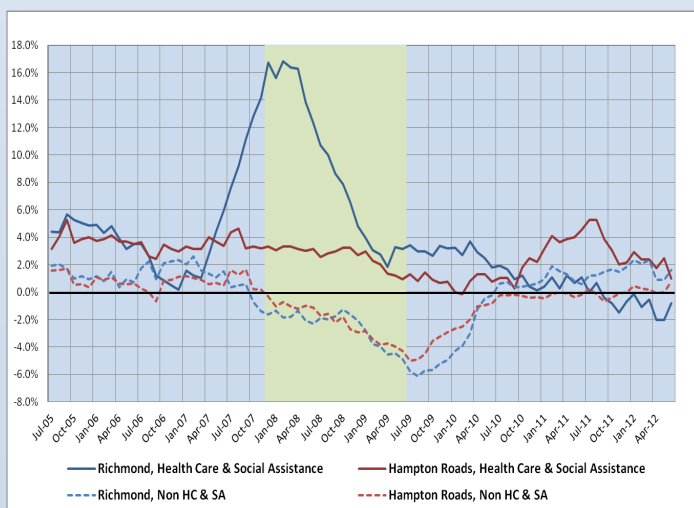
Figure 1: Annual Change in HC&SA Employment (Not Seasonally Adjusted, change from Dec to Dec.)

Year over Year Regional Employment Growth

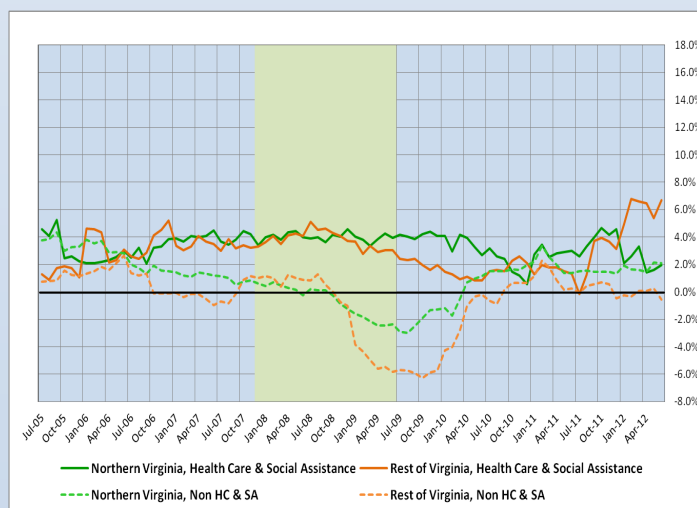
Virginia's HC&SA sector has been a source of employment strength for all areas of the Commonwealth throughout the recent recession and, with the exception of Richmond, most of the recovery. Richmond experienced a surge of HC&SA sector hiring beginning in fall of 2007 that continued almost into 2009. Hiring began to erode in 2010, and Richmond's HC&SA sector has experienced YOY declines since September 2011, continuing in June with a YOY decline of 0.81% despite strong monthly gains. Job growth in non-HC&SA sectors returned to more normal levels in early 2010. However, the HC&SA sector remained a relatively strong source of job growth in all areas except Richmond. More recently, the HC&SA sector has exhibited robust growth outside of Virginia's three largest metro areas. The HC&SA sector's YOY growth in rural and small metro Virginia (the "Rest of Virginia") has been 5% or stronger each month this year.

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.

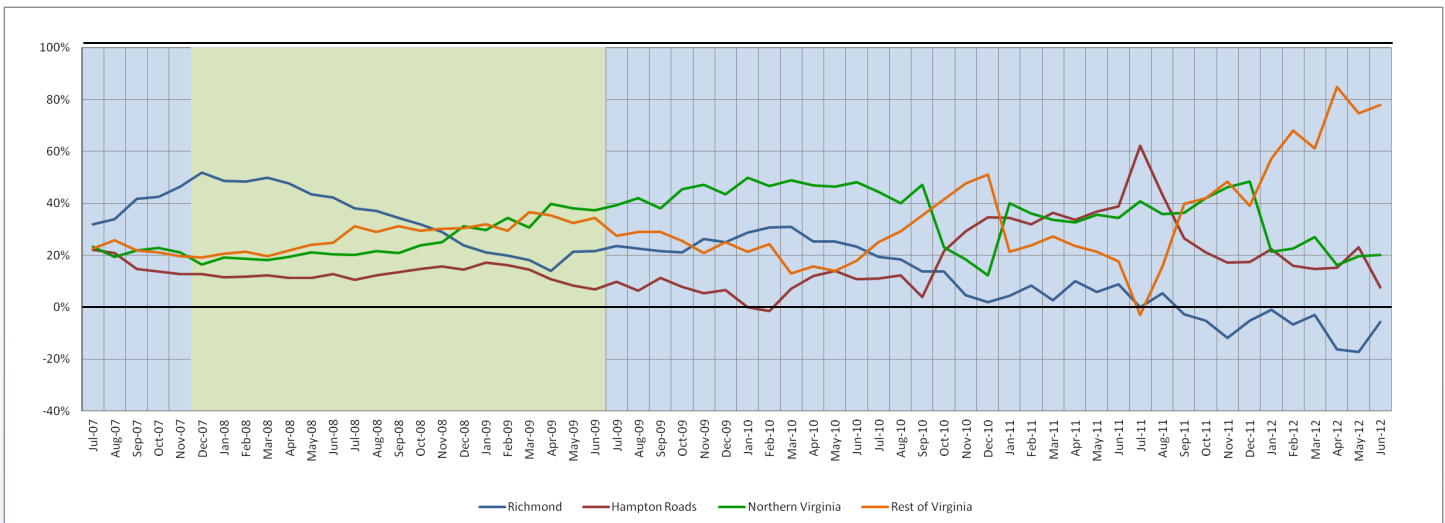
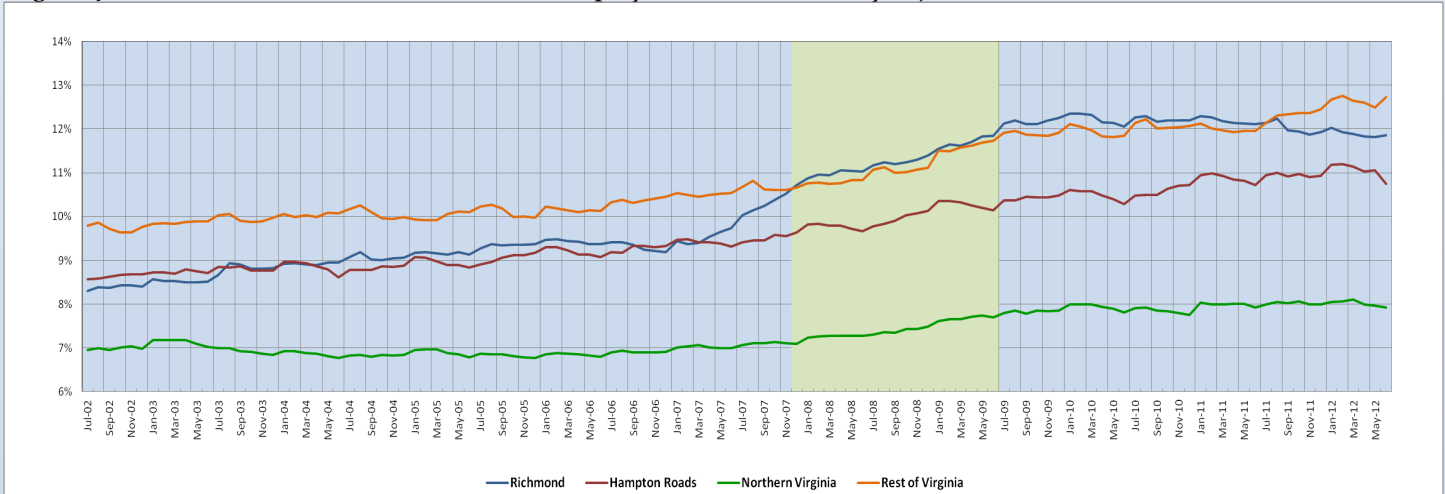


Figure 3 shows the distribution of new HC&SA sector jobs in the Commonwealth over the previous 12-month period. Results below 0% indicate job losses over the twelve month period, resulting in proportional gains for other areas. The Rest of Virginia (areas outside of Virginia's three largest MSAs) continues to capture a disproportionate share of Virginia's 12-month HC&SA growth. It captured 77.9% of growth since last June, a figure that hasn't been lower than 57% this year. Job losses have come from Richmond, which has lost 600 jobs in the prior 12 months, mathematically resulting in the Richmond MSA shifting a 5.8% share of Virginia's HC&SA job growth to other regions (a figure which peaked last month at a revised 17.2%). Hampton Roads has captured 7.7% of HC&SA jobs gained in the past 12 months, and Northern Virginia a 20.2% share.

Share of Employment

Figure 4: The HC&SA Sector's Share of Nonfarm Employment, Not Seasonally Adjusted.



Despite recent job losses in the Richmond MSA, the HC&SA sector remains a prominent employer, accounting for 11.85% of non-farm employment in June. The HC&SA sector's importance as a local employer grew in all regions through the recent recession, most prominently in the Richmond MSA. The HC&SA sector captures the smallest share (7.92%) of non-farm employment in Northern Virginia. The HC&SA sector captures the largest share (12.72%) of nonfarm employment outside of Virginia's three largest MSAs, overtaking Richmond MSA in July 2011. Hampton Roads' HC&SA sector captures a 10.75% share of the MSA's non-farm employment.

Distribution of Growth by Subsector

Not Seasonally Adjusted	Employment, in Thousands				Growth Rate, Annualized		
	May 2011	Feb 2012	Apr 2012	May 2012	12m Growth	3m growth, annualized	1m growth, annualized
Virginia							
Health Care & Social Assistance	382.4	390.9	391.2	392.8	2.7%	2.0%	5.0%
<i>Ambulatory Health Care Services</i>	148.8	151.9	153.0	151.6	1.9%	-0.8%	-10.4%
<i>Hospitals</i>	99.6	101.6	101.2	101.4	1.8%	-0.8%	2.4%
<i>Nursing & Residential Care Facilities</i>	69.7	73.2	72.8	74.5	6.9%	7.3%	31.9%
<i>Social Assistance</i>	64.3	64.2	64.2	65.3	1.6%	7.0%	22.6%
Virginia Beach, Norfolk, Newport News							
Health Care & Social Assistance	80.5	81.5	82.4	81.3	1.0%	-1.0%	-14.9%
<i>Hospitals</i>	20.0	20.1	20.1	20.1	0.5%	0.0%	0.0%
Northern Virginia							
Health Care & Social Assistance	106.5	108.5	108.4	108.6	2.0%	0.4%	2.2%
<i>Ambulatory Health Care Services</i>	47.3	48.9	49.5	49.3	4.2%	3.3%	-4.7%
<i>Hospitals</i>	23.8	23.8	23.8	23.8	0.0%	0.0%	0.0%

Preliminary estimates are italicized

Job gains in the HC&SA sector in June occurred mainly in the Nursing & Residential Care Facilities and Social Assistance subsectors. The Ambulatory Services subsector lost 1,000 jobs in June, an annualized rate of 10.4%, while the Hospital subsector experienced only slight gains. The Ambulatory Services subsector is at its lowest employment level since February. The Nursing & Residential Facilities subsector gained jobs at the fastest rate, gaining 1,700 jobs for a 31.9% annualized rate. Revisions to May figures were slight; however, hospital employment was revised upward by 200 for May, reducing the preliminary estimate of 600 jobs lost.

Share of HC&SA Employment by Subsector

While the HC&SA sector has been a strong contributor to job growth in Virginia through the recession, the contribution has not been evenly distributed. Hospitals were a strong contributor to job growth just prior to and through most of the recession. However, YOY job growth turned negative in the subsector as the recession moved to recovery. YOY growth did not return to the sector until August, 2011. Although it maintained positive YOY growth, the Nursing & Residential Facilities subsector showed a similar, though muted, pattern through the recession and recovery. The Ambulatory Services subsector saw moderate YOY growth decline through the recession before stabilizing at about 2.5% through the recovery. The Social Assistance subsector was the strongest contributor, maintaining YOY job growth of over 8% through the recession and the beginning of the recovery. However, YOY growth began to decline precipitously in spring of 2010 and has not stopped since. The subsector has experienced YOY declines in two of the past three months.

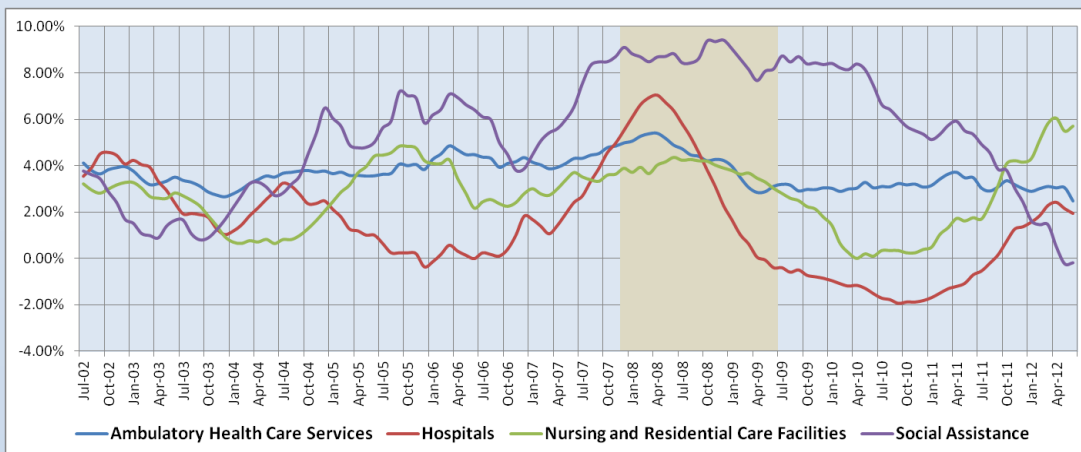
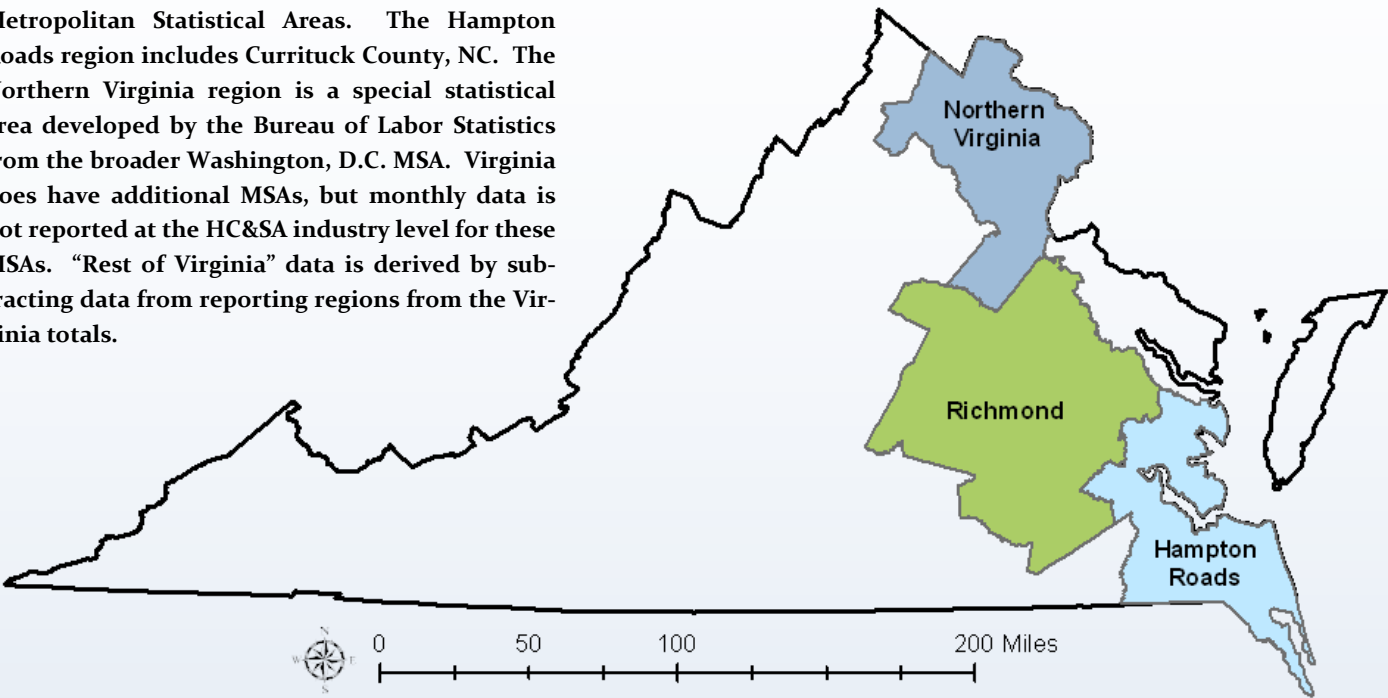


Figure 5: Year-over-year change in employment, 3-month moving average

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		Currituck, NC	Virginia Beach
Warren		Henrico			Williamsburg
		King & Queen			
		King William			
		Louisa			
		New Kent			
		Powhatan			
		Prince George			
		Sussex			

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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)

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).