



Virginia Healthcare Workforce Briefs

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

Series 2, Issue 19

July 2013

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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.
- ◆ According to preliminary estimates, Virginia's HC&SA sector gained 1,100 jobs in June. Despite this growth, however, Virginia's HC&SA sector has still experienced a net loss of 200 jobs through the first half of 2013.
- ◆ Meanwhile, May's preliminary estimate for HC&SA employment was revised downward by 400 jobs. With this revision, health care employment in May declined by 1,600 jobs, which represents its second worst month so far in 2013.
- ◆ Northern Virginia was by far the strongest region in the state with respect to HC&SA employment, adding 2,000 health care jobs in June. Hampton Roads and Richmond also made small positive contributions, with 400 jobs added across the two regions, but these gains were mitigated by a loss of 1,300 jobs in the Rest of Virginia.
- ◆ Subsector employment gains were strongest in Ambulatory Health Care Services, which added 1,600 jobs in June. Nursing & Residential Care Facilities and Hospitals added a combined 1,100 jobs, while Social Assistance lost 1,600 jobs.

Data in Brief

Not Seasonally Adjusted*	Employment, in Thousands				Growth Rate, Annualized		
	June 2012	Mar. 2013	May 2013	June 2013	12 Month	3 Month	1 Month
Virginia							
Total Nonfarm	3,754.1	3,729.8	3,781.5	3,799.8	1.2%	7.7%	6.0%
Health Care & Social Assistance	392.1	400.8	401.7	402.8	2.7%	2.0%	3.3%
Virginia Beach, Norfolk, Newport News							
Total Nonfarm	750.5	747.5	758.2	769.3	2.5%	12.2%	19.1%
Health Care & Social Assistance	82.9	84.8	86.3	86.6	4.5%	8.8%	4.3%
Northern Virginia							
Total Nonfarm	1,366.7	1,358.9	1,376.2	1,388.2	1.6%	8.9%	11.0%
Health Care & Social Assistance	109.5	110.9	109.3	111.3	1.6%	1.5%	24.3%
Richmond							
Total Nonfarm	629.0	624.5	634.4	635.6	1.0%	7.3%	2.3%
Health Care & Social Assistance	77.4	79.9	80.5	80.6	4.1%	3.6%	1.5%
Rest of Virginia							
Total Nonfarm	1,007.9	998.9	1,012.7	1,006.7	-0.1%	3.2%	-6.9%
Health Care & Social Assistance	122.3	125.2	125.6	124.3	1.6%	-2.8%	-11.7%

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 Employment Growth, Level

Virginia's HC&SA sector rebounded strongly in June, boosted by another positive month for total nonfarm payroll growth in the state. Virginia experienced its fifth consecutive month of overall employment growth, adding 18,300 jobs in June. Virginia's HC&SA sector made a positive contribution of 1,100 monthly jobs, although these gains were mitigated somewhat

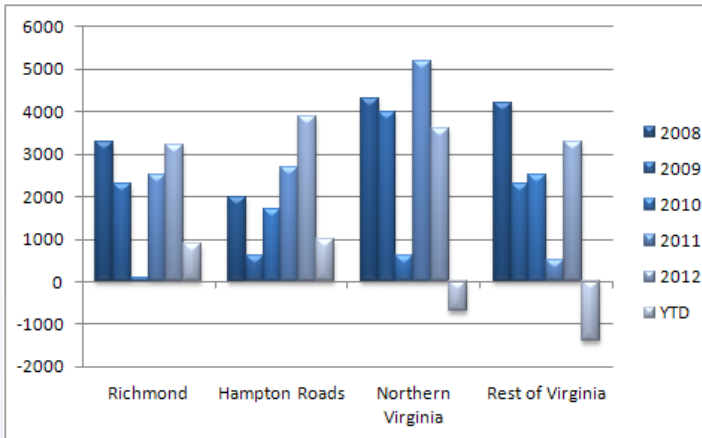


Figure 1: Annual Change in HC&SA Employment (Not Seasonally Adjusted, Change from Dec to Dec.)

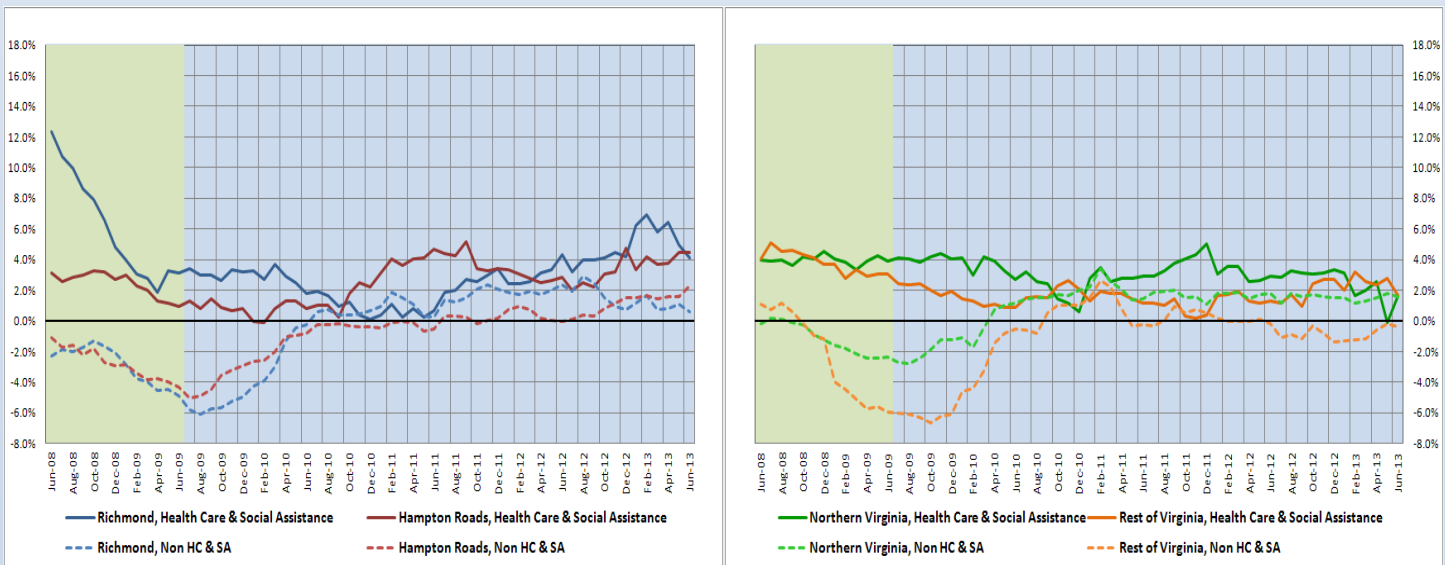
by the downward revision of 400 jobs to May's preliminary estimate for HC&SA employment. With this revision, employment in Virginia's HC&SA sector declined by 1,600 jobs in May.

With an increase of 2,000 jobs in June, Northern Virginia erased most of its year-to-date losses in the HC&SA sector. Hampton Roads and Richmond also saw positive employment growth in June by adding 300 and 100 jobs, respectively. However, much of these gains were erased by a loss of 1,300 jobs in the Rest of Virginia, thereby eliminating all of its year-to-date employment gains. During the first half of 2013, two of Virginia's four regions have experienced positive employment gains: Hampton Roads (1,000 jobs) and Richmond (900 jobs).

Year-Over-Year Regional Employment Growth

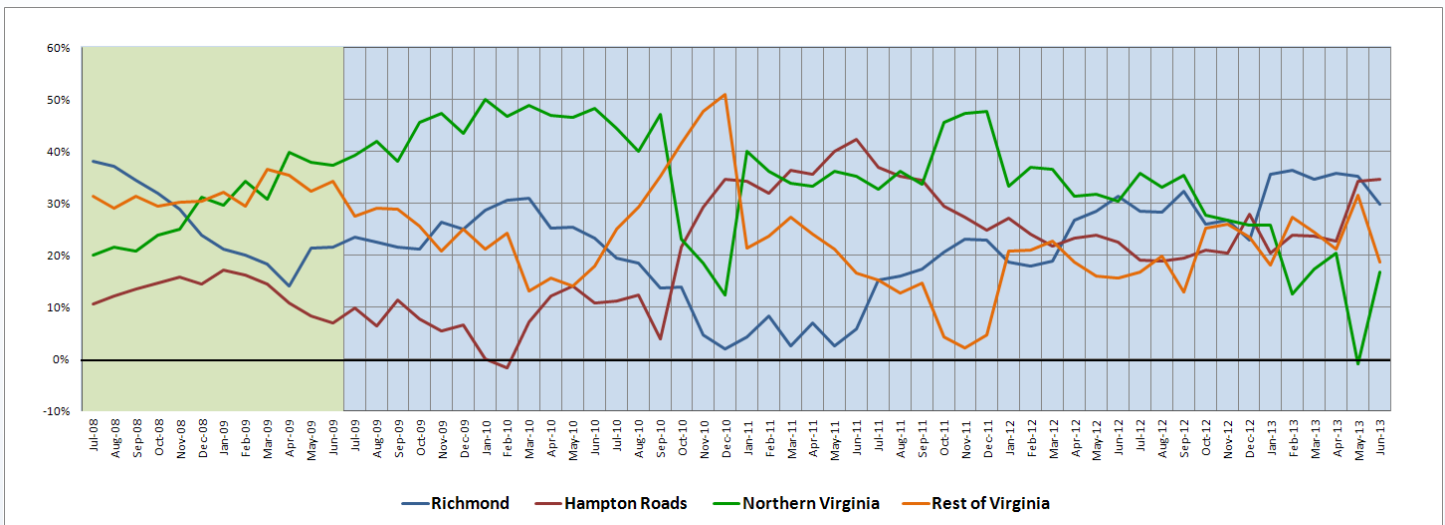
Despite relatively weak growth in Hampton Roads and Richmond during the month of June, these two regions have been the main drivers of year-over-year employment growth in Virginia's HC&SA sector. Both regions currently have year-over-year HC&SA employment growth of more than 4%, but the recent trends have been widely divergent for the two regions. For Hampton Roads, its 4.46% year-over-year growth is near its highest levels in 2013. However, Richmond, with 4.13% year-over-year growth, had its lowest year-over-year change this year, having fallen from a high of 6.91% in February. Meanwhile, the other two regions in the state, Northern Virginia and the Rest of Virginia, now have identical 1.64% year-over-year growth. For Northern Virginia, this represents a considerable improvement over May, when its year-over-year HC&SA employment growth went negative for the first time in nine years. Meanwhile, the Rest of Virginia, like Richmond, now has its lowest year-over-year change so far this year.

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.



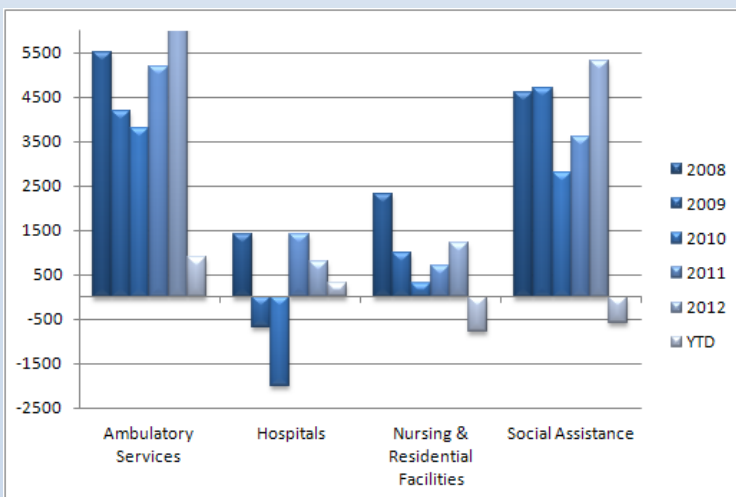
With its 2,000 job increase in June, Northern Virginia saw a dramatic rebound in its 12-month HC&SA growth share. Although the region still has the lowest employment growth share in the state, it did increase from -0.93% in May to 16.82% in June. Much of this growth came at the expense of the Rest of Virginia, which saw its employment growth share decrease from 31.48% in May to 18.69% in June.

Meanwhile, for the first time in 2013, Richmond did not have the highest share of the previous 12-month growth in Virginia's HC&SA sector. This distinction is now bestowed upon Hampton Roads, which currently has a 12-month growth share of 34.58%, its highest value in nearly two years. Alternatively, Richmond now has its lowest share this year at 29.91%

Subsector Employment Growth

Three of Virginia's four HC&SA subsectors saw positive employment growth in June. This growth was led by the Ambulatory Health Care Services subsector, which added 1,600 jobs during the month. Meanwhile, the Nursing & Residential Care Facilities subsector added 700 jobs, while the Hospitals subsector added 400 jobs. June's results would have been even more impressive had it not been for the Social Assistance subsector, which experienced its worst month so far in 2013 with a loss of 1,600 jobs.

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



During the first half of 2013, HC&SA employment growth has been concentrated in just two sectors: Ambulatory Health Care Services and Hospitals. After its strong month in June, Ambulatory Health Care Services reversed what had been negative year-to-date employment growth and is now the strongest subsector in the state, with 900 jobs added in 2013. Meanwhile, the Social Assistance subsector gave back all of its year-to-date employment gains after June's losses. With this month's result, the Social Assistance subsector has lost 600 jobs so far in 2013. This makes the Social Assistance subsector the second weakest subsector with respect to its year-to-date performance; Nursing & Residential Care Facilities, despite its impressive results in June, has still lost 800 jobs in 2013.

Not Seasonally Adjusted	Employment, in Thousands				Growth Rate, Annualized		
	June 2012	Mar. 2013	May 2013	June 2013	12 Month	3 Month	1 Month
Virginia							
Health Care & Social Assistance	392.1	400.8	401.7	402.8	2.7%	2.0%	3.3%
<i>Ambulatory Health Care Services</i>	155.1	157.7	157.9	159.5	2.8%	4.6%	12.9%
<i>Hospitals</i>	100.1	101.7	102.0	102.4	2.3%	2.8%	4.8%
<i>Nursing & Residential Care Facilities</i>	69.9	69.6	69.5	70.2	0.4%	3.5%	12.8%
<i>Social Assistance</i>	67.0	71.8	72.3	70.7	5.5%	-6.0%	-23.6%
Virginia Beach, Norfolk, Newport News							
Health Care & Social Assistance	82.9	84.8	86.3	86.6	4.5%	8.8%	4.3%
<i>Hospitals</i>	20.2	20.7	21.1	21.2	5.0%	10.0%	5.8%
Northern Virginia							
Health Care & Social Assistance	109.5	110.9	109.3	111.3	1.6%	1.5%	24.3%
<i>Ambulatory Health Care Services</i>	50.2	50.2	48.8	50.0	-0.4%	-1.6%	33.8%
<i>Hospitals</i>	22.6	23.3	22.9	23.0	1.8%	-5.1%	5.4%

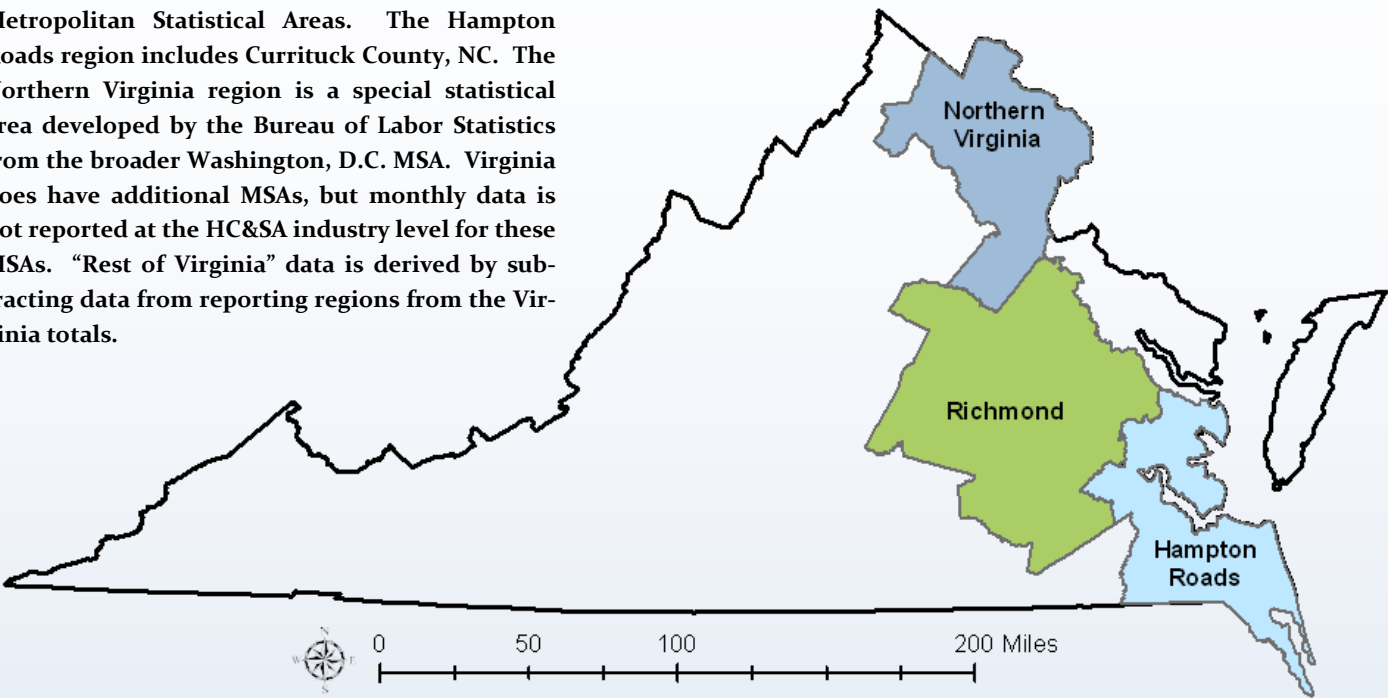
Ambulatory Health Care Services and Nursing & Residential Care Facilities both experienced one-month annualized growth rates of nearly 13% in June, while the Hospitals subsector also exhibited a strong one-month annualized growth rate of 4.8%. For all three of these subsectors, growth accelerated in June relative to both their 3-month and 12-month annualized growth rates. However, this was not the case for the Social Assistance subsector, which has experienced negative growth over both one-month and three-month time periods. Due to its employment losses in June, the 12-month growth rate for Social Assistance declined from 8.2% to 5.5%, but it is still the fastest growing subsector on a year-over-year basis.

After declining in May to its lowest level since August 2008, the Ambulatory Health Care Services subsector rebounded strongly in June to 41.12% and has regained the largest share of the previous 12-month growth in Virginia's HC&SA sector. Meanwhile, the Social Assistance subsector, which was responsible for fully half of all year-over-year employment growth in May, saw its share drop by more than 30% in June to 34.58%. For the first half of 2013, the most impressive growth has come from the Hospitals subsector: its 12-month share has increased by 158% to 21.50% since January.

[illegible]

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).

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)