



Virginia Healthcare Workforce Briefs

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

Series 2, Issue 14

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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.
- ◆ This brief incorporates the Bureau of Labor Statistics annual benchmark adjustments to historical results which led to important changes in regional and subsectoral trends in Virginia's HC&SA sector
- ◆ According to preliminary estimates, Virginia's HC&SA sector lost 4,400 jobs in January, an annualized rate of decline of 12.3%. Seasonal factors likely played a strong role in this decline. Year-over-year employment increased by 3.4%.
- ◆ All of Virginia's regions shared in HC&SA job losses, with Hampton Roads experiencing the largest decline (2,000 jobs) and the largest rate of decline (25% annualized rate).
- ◆ With benchmark adjustments, the Social Assistance subsector became the third largest HC&SA employer in Virginia overtaking Nursing & Residential Care Facilities, which became the smallest.

Data in Brief

Not Seasonally Adjusted*	Employment, in Thousands				Growth Rate, Annualized		
	Jan.	Oct.	Dec.	Jan.	12 Month	3 Month	1 Month
Virginia							
Total Nonfarm	3653.1	3761.9	3762.6	3685.8	0.9%	-7.8%	-21.9%
Health Care & Social Assistance	385.6	398.5	403.0	398.6	3.4%	0.1%	-12.3%
Virginia Beach, Norfolk, Newport News							
Total Nonfarm	725.5	747.9	754.5	737.2	1.6%	-5.6%	-24.3%
Health Care & Social Assistance	81.2	83.8	85.6	83.6	3.0%	-1.0%	-24.7%
Northern Virginia							
Total Nonfarm	1,328.9	1,365.1	1,371.5	1,349.8	1.6%	-4.4%	-17.4%
Health Care & Social Assistance	107.9	110.8	112.0	111.0	2.9%	0.7%	-10.2%
Richmond							
Total Nonfarm	608.6	630.2	627.4	619.9	1.9%	-6.4%	-13.4%
Health Care & Social Assistance	75.2	78.9	79.7	80.0	6.4%	5.7%	4.6%
Rest of Virginia							
Total Nonfarm	990.1	1,018.7	1,009.2	978.9	-1.1%	-14.7%	-30.6%
Health Care & Social Assistance	121.3	125.0	125.7	124.0	2.2%	-3.2%	-15.1%

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

The first month of 2013 was a difficult one for Virginia's HC&SA sector as it supported 4,400 fewer jobs than in December on a non-seasonally adjusted basis. This is a loss of over 1% of jobs in the sector, or a 12.3% annualized rate of decline. Although January tends to be a bad month for jobs on a non-seasonally adjusted basis, this was the worst performance for the

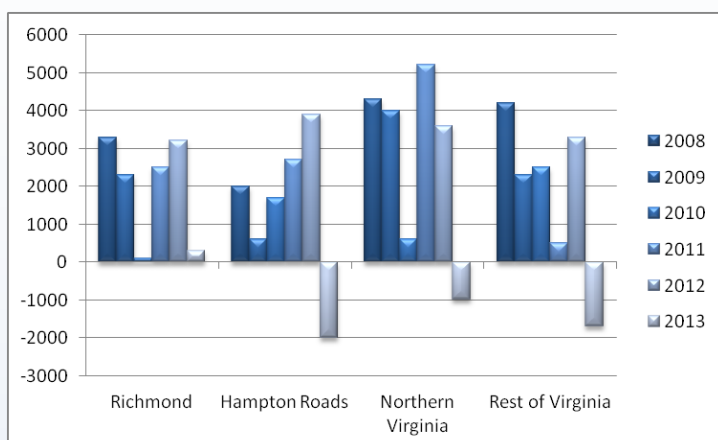


Figure 1: Annual Change in HC&SA Employment (Not Seasonally Adjusted, Change from Dec to Dec.)

sector in any month since January 2005. These losses were mitigated somewhat by the upward revision of 1,300 jobs over December's preliminary estimate. Additionally, year-over-year growth remains robust, with the sector supporting 3.4% more jobs than it did in January 2012.

Monthly HC&SA job losses affected just about every major region of the state. Hardest hit was the Hampton Roads area, which lost 2,000 HC&SA jobs, or a 24.7% annualized rate of decline. Northern Virginia and regions outside of the major MSAs (the "Rest of Virginia") also experienced significant declines. Only Richmond bucked the trend, gaining 300 jobs. On a year-over-year and 3-month basis Richmond has experienced the highest job growth in the sector at 6.4% and 5.7% annualized, respectively.

Benchmark Adjustments

The Series 1 & Series 2 briefs are based on data from the Bureau of Labor Statistics' Current Establishment Survey (CES). Each year the BLS benchmarks CES results with unemployment insurance payment records obtained from states. Benchmarked data is released in February using unemployment insurance data current as of the previous March. Details on benchmarking are available here: <http://www.bls.gov/web/empsit/cesbmart.htm>. The current benchmark affected results published as early as April 2011. Original estimates and benchmark results for Dec. 2011 and Nov. 2012 appear in the table below.*

Overall, benchmarking led to minor changes for Virginia's HC&SA sector. The benchmark added 2,100 jobs to Dec. 2011 results and only 300 to Nov. 2012 results—less than 1/3 of 1% in both instances. Slightly larger, but still relatively small, adjustments occurred in the Hampton Roads and Northern Virginia MSAs.

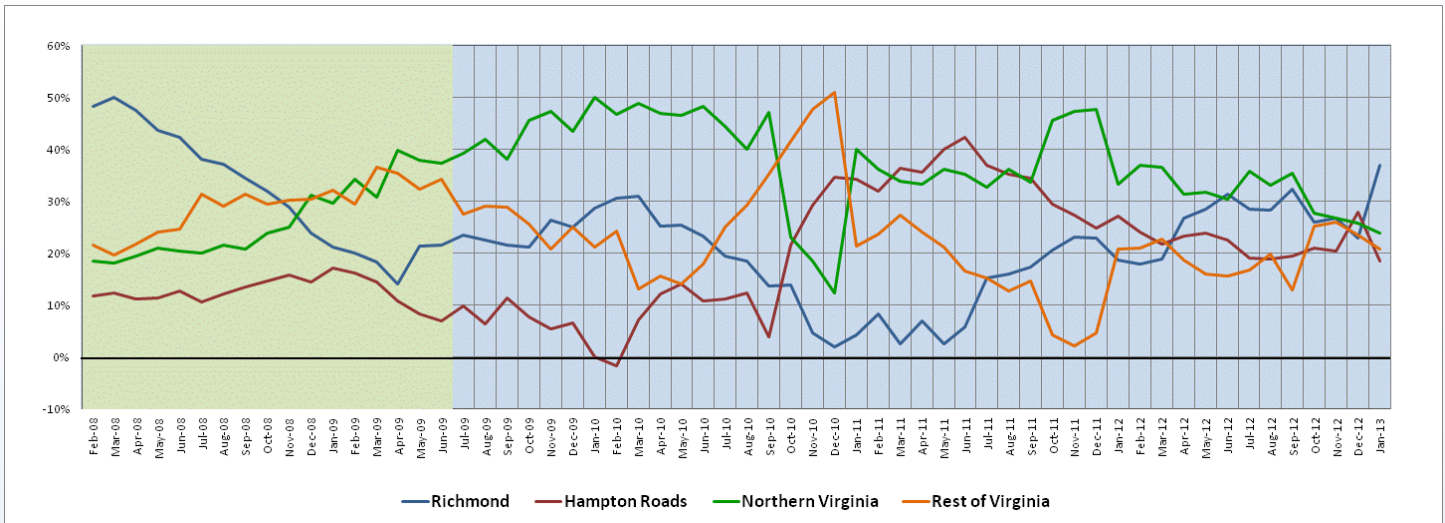
Adjustments in the Richmond MSA and the Rest of Virginia region were more pronounced. Richmond's estimates were adjusted upward by 4.1% in Dec. 2011 and 5.4% in Nov. 2012. Estimates for the Rest of Virginia were adjusted downward by 2.6% for Dec. 2011 and 4.0% in Nov. 2012. Richmond, which had previously been a laggard, saw its growth fall more in line with statewide growth. The Rest of Virginia had the opposite result, seeing its large gains revert closer to the statewide mean. These adjustments had a significant impact on the HC&SA employment story for these regions as presented in the data in these briefs.

	Hampton Roads	Northern Virginia	Richmond	Rest of Virginia	Virginia
Dec. 2011					
Original	80.7	107.9	73.5	125.7	387.8
Benchmarked	81.7	108.4	76.5	122.4	389
Percent Change	1.24%	0.46%	4.08%	-2.63%	0.31%
Nov. 2012					
Original	83.7	110.3	75.5	130.8	400.3
Benchmarked	84.2	111.3	79.6	125.5	400.6
Percent Change	0.60%	0.91%	5.43%	-4.05%	0.07%

*We chose to display the last month with an unbenchmarked, revised estimate for each year. To give an indication of how benchmarking affected results.. Unbenchmarked revised estimates for December 2012 were not published. Rather, they were replaced with benchmarked estimates.

Regional Share of 12-month Growth

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

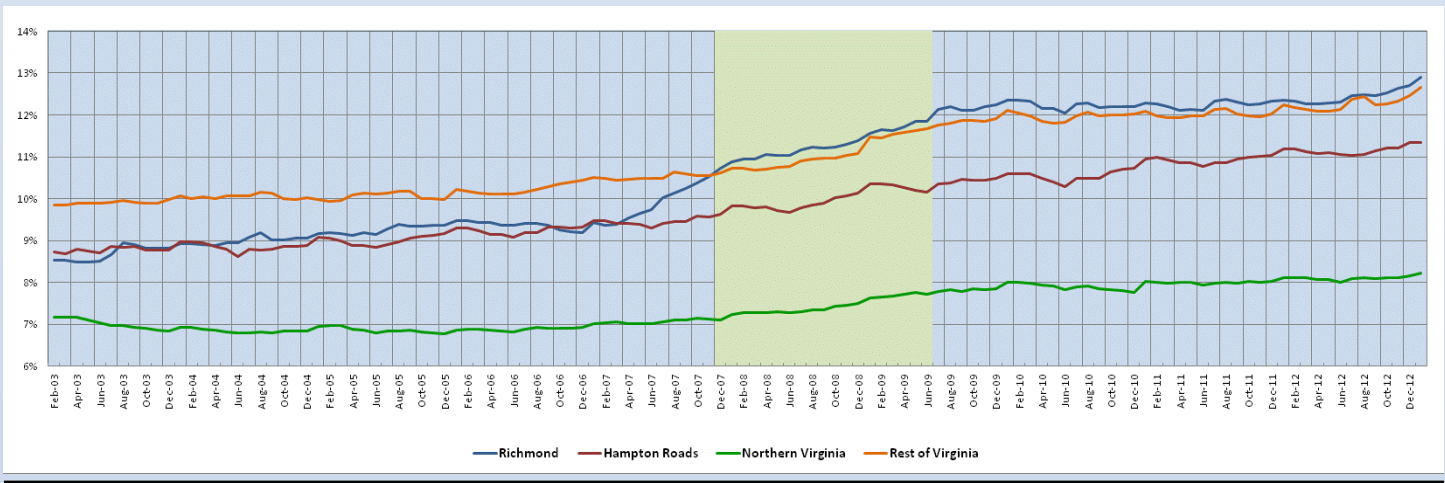


The significance of the benchmark adjustments are demonstrated by changes in share of 12-month employment gains. Figure 3 shows the distribution of new HC&SA sector jobs in the Commonwealth over the previous 12-month period. Results below 0% indicate job losses over the twelve month period, resulting in proportional gains for other areas. While the Rest of Virginia had been a leader in this indicator and Richmond a laggard, both appear more normal now. In fact, Richmond is responsible for over 1/3 of Virginia's HC&SA job gains in the past twelve months, making it the largest producer of HC&SA jobs in the past year. Hampton Roads produced the lowest share, just under 20%, a level it has hovered around for most of the year. The Northern Virginia region, which had been responsible for the largest share of job growth for most of the year, fell to less than a quarter share of 12-month HC&SA job growth for the first time since December 2010.

Share of Payroll Jobs

The HC&SA sector increased its importance as an employer in all regions of the state through the recession. This trend has continued through the recovery, albeit at a slower pace, leading to new records in employment share for all regions. As it stands, the HC&SA sector accounts for just under 13% of employment in Richmond and the "Rest of Virginia" and over 11% in Hampton Roads. In Northern Virginia, which is a major job driver in the state, the HC&SA sector accounts for over 8% of employment.

Figure 4: HC&SA share of Nonfarm employment, by region (not seasonally adjusted).



Distribution of Growth by Subsector

Not Seasonally Adjusted	Employment, in Thousands				Growth Rate, Annualized		
	Jan. 2012	Oct. 2012	Dec. 2012	Jan. 2013	12 Month	3 Month	1 Month
Virginia							
Health Care & Social Assistance	385.6	398.5	403.0	398.6	3.4%	0.1%	-12.3%
<i>Ambulatory Health Care Services</i>	151.1	157.8	158.6	157.7	4.4%	-0.3%	-6.6%
<i>Hospitals</i>	100.1	102.1	102.1	101.0	0.9%	-4.2%	-12.2%
<i>Nursing & Residential Care Facilities</i>	69.3	69.3	71.0	69.8	0.7%	2.9%	-18.5%
<i>Social Assistance</i>	65.1	69.3	71.3	70.1	7.7%	4.7%	-18.4%
Virginia Beach, Norfolk, Newport News							
Health Care & Social Assistance	81.2	83.8	85.6	83.6	3.0%	-1.0%	-24.7%
<i>Hospitals</i>	19.9	20.6	21.0	20.5	3.0%	-1.9%	-25.1%
Northern Virginia							
Health Care & Social Assistance	107.9	110.8	112.0	111.0	2.9%	0.7%	-10.2%
<i>Ambulatory Health Care Services</i>	49.0	51.1	51.6	51.3	4.7%	1.6%	-6.8%
<i>Hospitals</i>	23.2	22.9	22.8	22.7	-2.2%	-3.4%	-5.1%

Preliminary estimates are italicized

Job losses in January hit all parts of the HC&SA sector. Both Nursing & Residential Care Facilities and Social Assistance experienced month-over-month annualized losses of over 18%. Ambulatory Services were relatively unscathed, experiencing annualized losses under 7%. All subsectors, however, supported more jobs than in the previous January. Year-over-year growth in Hospitals and Nursing & Residential Care Facilities was low—under 1%. Nevertheless, the number of jobs in the Hospital subsector is at a six-month low.

Share of 12-Month Growth by Subsector

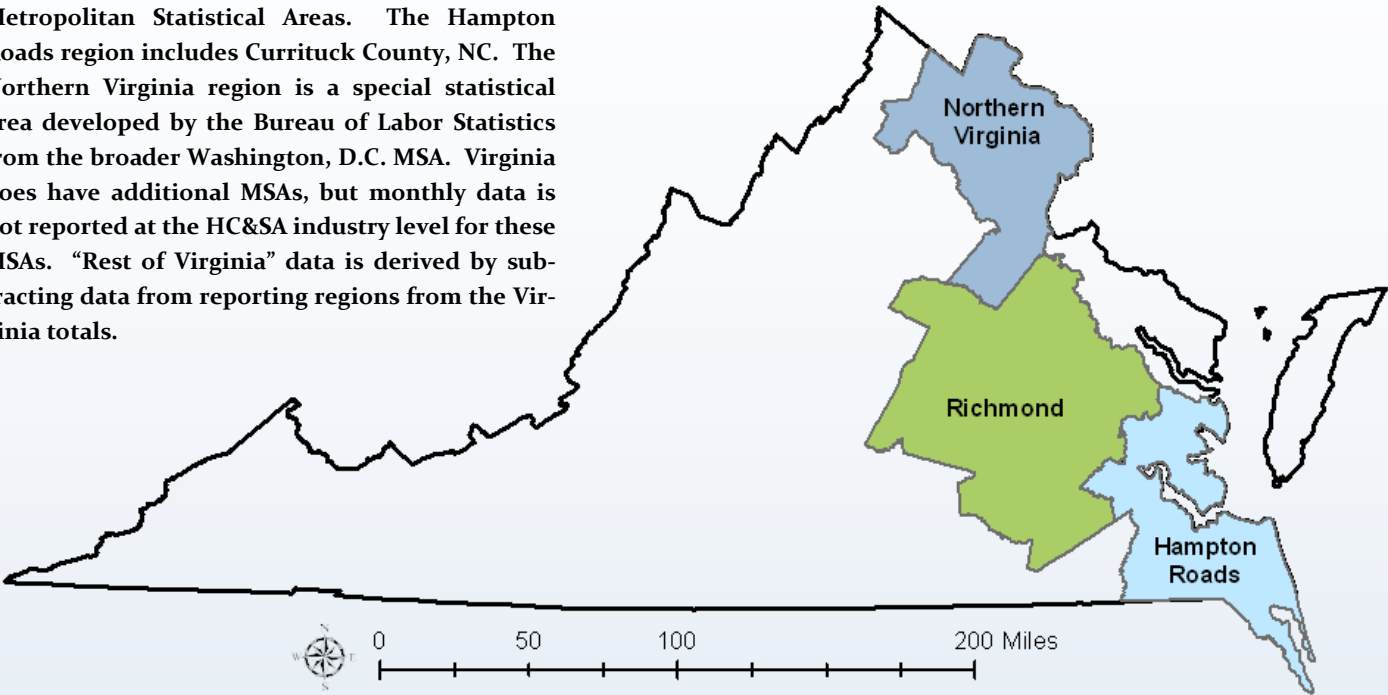
As with regions, the BLS' annual benchmarking had little impact on statewide totals but led to significant changes in the employment results for subsectors. Unlike with regions, however, these adjustments affected all subsectors. Ambulatory Services and Hospital results experienced little change to their Dec. 2011 numbers, but changes to the Nov. 2012 figures were significant. Ambulatory Services results were adjusted up by almost 3%, while hospital figures were adjusted downward by over 2%.

The most striking changes, however, occurred in the Nursing & Residential Care Facilities results and in the Social Assistance results. Nursing & Residential Care Facilities' Dec. 2011 results were adjusted downward by almost 3%. The Nov. 2012 results were adjusted downward by almost 7%—a 5,000 job difference. Social Assistance results were adjusted upwards by almost 4% for both months, a change of about 3,000 jobs. With these adjustments, Social Assistance overtook Nursing & Residential Care Facilities as the 3rd largest HC&SA employer in Virginia, beginning in November 2012.

	Ambulatory Services	Hospitals	Nursing & Residential	Social Assistance	HC&SA
Dec. 2011					
Original	151.6	101	71.9	63.3	387.8
Benchmarked	151.9	101.3	69.8	66	389
% Change	0.20%	0.30%	-2.92%	4.27%	0.31%
Nov. 2012					
Original	153.3	104.6	75.1	67.3	400.3
Benchmarked	157.8	102.2	70	70.6	400.6
% Change	2.94%	-2.29%	-6.79%	4.90%	0.07%

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		Currituck, NC	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).