



Virginia Healthcare Workforce Briefs

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

Series 2, Issue 27

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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 Health Care & Social Assistance (HC&SA) sector added 3,100 jobs in March. In addition, February's preliminary estimate for HC&SA employment was revised upward by 900 jobs, although the sector still lost 1,000 jobs during the month.
- ◆ Every region in Virginia added HC&SA jobs in March. Richmond was the strongest performer, adding 1,100 HC&SA jobs during the month. Hampton Roads saw HC&SA employment increase by 800 jobs, while Northern Virginia added 500 new HC&SA jobs. The Rest of Virginia added 700 HC&SA jobs in March.
- ◆ Every HC&SA subsector also experienced job gains in March. Ambulatory Health Care Services added 1,100 jobs, making it the single largest contributor to this month's HC&SA employment gains. Meanwhile, Social Assistance added 800 jobs, Nursing & Residential Care Facilities added 700 jobs, and Hospitals added 500 jobs.

Data in Brief

Not Seasonally Adjusted*	Employment, in Thousands				Growth Rate, Annualized		
	Mar. 2013	Dec. 2013	Feb. 2014	Mar. 2014	12 Month	3 Month	1 Month
Virginia							
Total Nonfarm	3,740.0	3,785.3	3,717.4	3,741.1	0.0%	-4.6%	7.9%
Health Care & Social Assistance	407.1	414.2	411.4	414.5	1.8%	0.3%	9.4%
Virginia Beach, Norfolk, Newport News							
Total Nonfarm	746.4	753.7	737.2	744.3	-0.3%	-4.9%	12.2%
Health Care & Social Assistance	86.1	88.9	89.0	89.8	4.3%	4.1%	11.3%
Northern Virginia							
Total Nonfarm	1,357.5	1,377.6	1,351.6	1,358.3	0.1%	-5.5%	6.1%
Health Care & Social Assistance	114.1	115.5	113.8	114.3	0.2%	-4.1%	5.4%
Richmond							
Total Nonfarm	627.7	638.7	633.7	639.2	1.8%	0.3%	10.9%
Health Care & Social Assistance	79.3	80.6	81.6	82.7	4.3%	10.8%	17.4%
Rest of Virginia							
Total Nonfarm	1,008.4	1,015.3	994.9	999.3	-0.9%	-6.2%	5.4%
Health Care & Social Assistance	127.6	129.2	127.0	127.7	0.1%	-4.6%	6.8%

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 HC&SA Employment Growth, Level

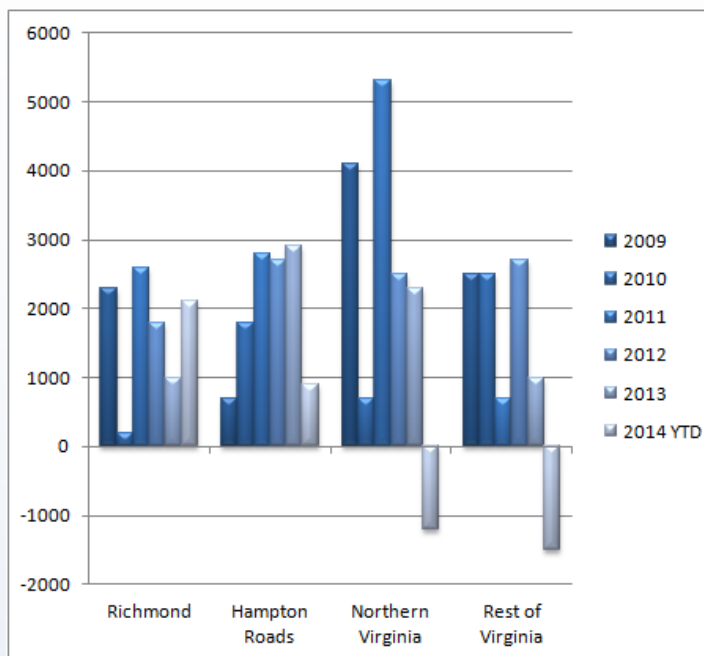


Figure 1: Annual Change in HC&SA Employment (Not Seasonally Adjusted, Change from Dec to Dec).

According to preliminary data released on April 29, 2014 by the U.S. Department of Labor, Bureau of Labor Statistics, Virginia's HC&SA added 3,100 jobs in March, which represents its best monthly performance in more than three years. In addition, February's preliminary estimate for Virginia's HC&SA employment was revised upward by 900 jobs. Even after this revision, however, HC&SA employment in Virginia fell by 1,000 jobs in February.

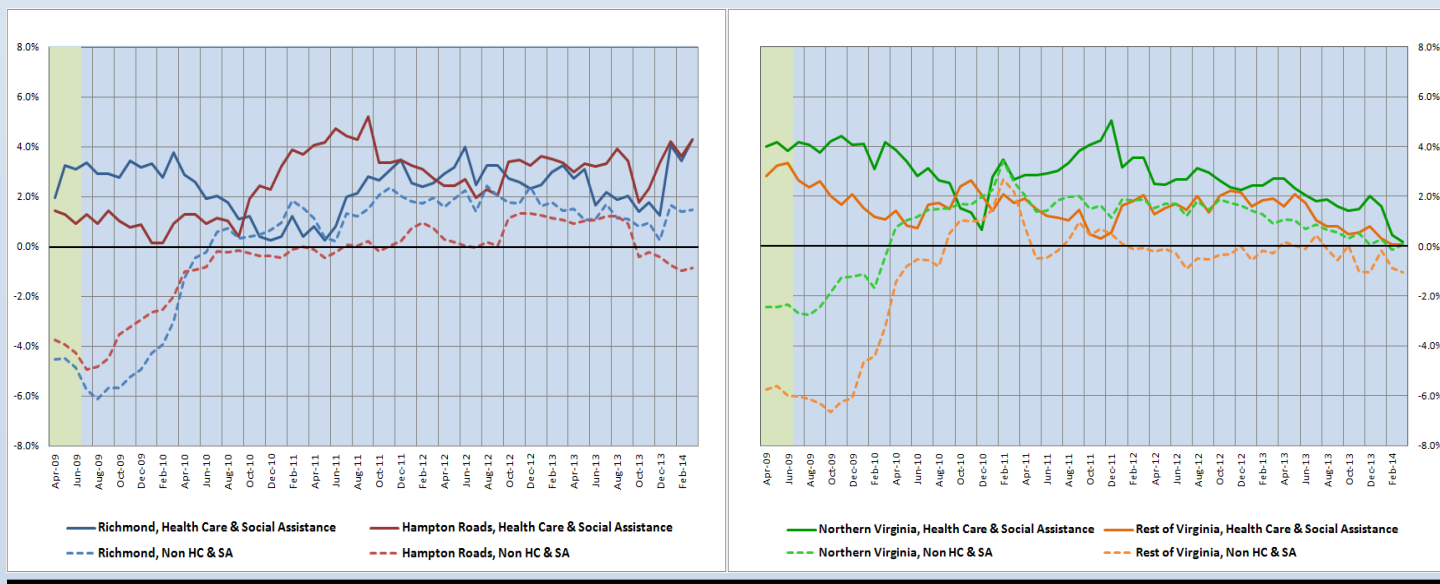
With March's very strong employment gains, Virginia's HC&SA sector is now experiencing positive year-to-date employment growth. However, given the lackluster performance of the sector during the first two months of the new year, only 300 HC&SA jobs have been created in the state so far in 2014.

Year-to-date HC&SA job gains have been concentrated in just two regions of Virginia: Richmond and Hampton Roads. HC&SA job gains have been particularly impressive in Richmond, which, in just three months, has already exceeded its full-year job gains for each of the previous two years.

Year-Over-Year Regional Employment Growth

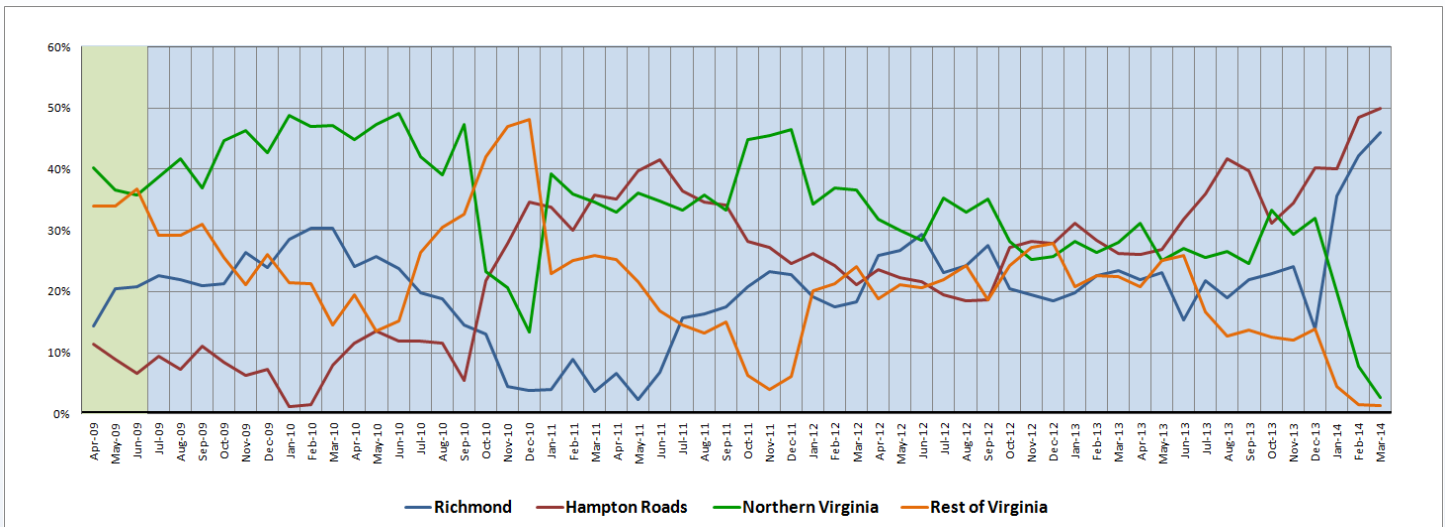
The discrepancies between different regions in Virginia become particularly sharp when considering year-over-year employment growth. Both Richmond and Hampton Roads are currently enjoying year-over-year HC&SA employment growth rates of 4.3%, while Northern Virginia and the Rest of Virginia are sporting year-over-year HC&SA employment growth rates that are barely positive. However, in all four regions, year-over-year HC&SA employment growth still exceeds the corresponding growth rates in the non-HC&SA sectors. In fact, non-HC&SA employment growth is nonexistent in three out of Virginia's four regions; only Richmond is currently experiencing decent employment growth in its non-HC&SA sectors.

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



Regional Share of 12-month Growth

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



Over the past year, Northern Virginia and the Rest of Virginia have experienced precipitous declines in their respective 12-month HC&SA employment growth shares, and these declines were not arrested in March. In March 2013, all four regions in Virginia enjoyed 12-month HC&SA employment growth shares that were above 20%. However, Northern Virginia's 12-month HC&SA employment growth share fell from 7.8% to 2.7% in March, while the Rest of Virginia saw its 12-month HC&SA employment growth share decline from 1.6% to 1.4% during the month. Meanwhile, Hampton Roads and Richmond both increased their respective 12-month HC&SA employment growth shares in March. Impressively, Hampton Roads' 12-month HC&SA employment growth share reached 50% this month, its highest value in more than a decade.

Subsector Employment Growth

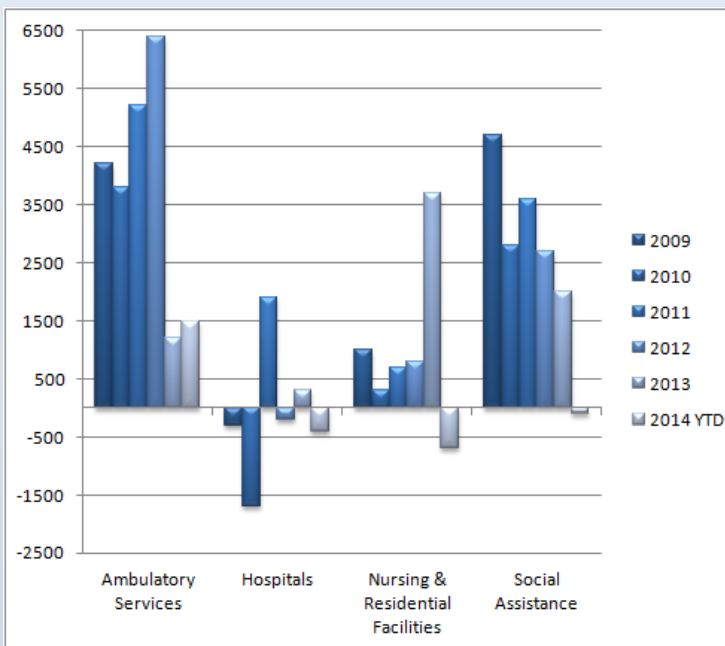


Figure 4: Annual & YTD Change in HC&SA Subsector Employment (Not Seasonally Adjusted, Dec. to Dec.)

Every HC&SA subsector experienced positive employment gains in March. Ambulatory Health Care Services added 1,100 jobs, making this subsector the best performer during the month. However, the other three HC&SA subsectors also performed well: Social Assistance added 800 jobs, Nursing & Residential Care Facilities added 700 jobs, and Hospitals increased employment by 500 jobs. Both Social Assistance and Nursing & Residential Care Facilities experienced one-month annualized employment growth rates in the double digits, and even March's slowest growing sector, Hospitals, had a one-month annualized employment growth rate of nearly 6%.

However, despite March's broad-based gains, three of Virginia's four HC&SA subsectors are still experiencing year-to-date employment losses. Only Ambulatory Health Care Services has managed to produce year-to-date employment gains, adding 1,500 HC&SA jobs during the first quarter of 2014. This result already exceeds the 1,200 jobs added in this subsector during all of 2013.

Distribution of Growth by Subsector

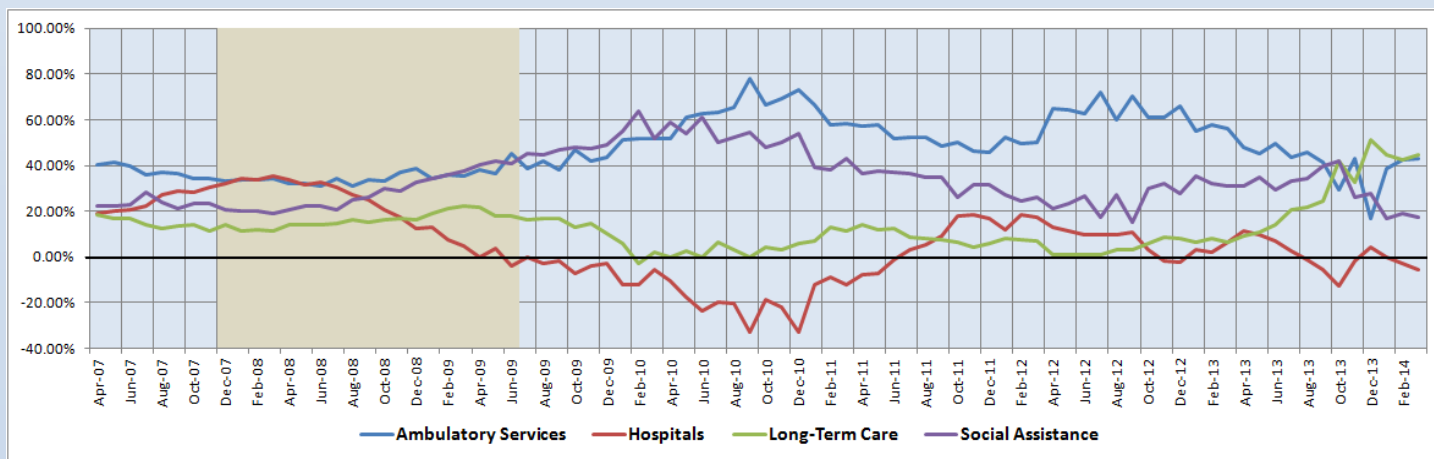
Not Seasonally Adjusted	Employment, in Thousands				Growth Rate, Annualized		
	Mar. 2013	Dec. 2013	Feb. 2014	Mar. 2014	12 Month	3 Month	1 Month
Virginia							
Health Care & Social Assistance	407.1	414.2	411.4	414.5	1.8%	0.3%	9.4%
<i>Ambulatory Health Care Services</i>	157.8	159.5	159.9	161.0	2.0%	3.8%	8.6%
<i>Hospitals</i>	109.7	109.7	108.8	109.3	-0.4%	-1.5%	5.7%
<i>Nursing & Residential Care Facilities</i>	70.3	74.3	72.9	73.6	4.7%	-3.7%	12.2%
<i>Social Assistance</i>	69.3	70.7	69.8	70.6	1.9%	-0.6%	14.7%
Virginia Beach, Norfolk, Newport News							
Health Care & Social Assistance	86.1	88.9	89.0	89.8	4.3%	4.1%	11.3%
<i>Hospitals</i>	22.2	23.2	23.0	22.9	3.2%	-5.1%	-5.1%
Northern Virginia							
Health Care & Social Assistance	114.1	115.5	113.8	114.3	0.2%	-4.1%	5.4%
<i>Ambulatory Health Care Services</i>	51.7	53.3	53.0	52.9	2.3%	-3.0%	-2.2%
<i>Hospitals</i>	25.7	24.1	24.0	24.5	-4.7%	6.8%	28.1%

Preliminary estimates are italicized

Three of Virginia's four HC&SA subsectors continue to grow at an above-average 12-month employment growth rate. However, the Hospitals subsector, which has actually seen employment fall by 400 jobs over the course of the past year, continues to drag down the overall average. The Hospitals subsector has done particularly poorly in Northern Virginia, which has lost 1,200 jobs in the past 12 months, but its one-month annualized employment growth rate of 28.1% does augurs well for a rebound in the coming months. Meanwhile, the Hospitals subsector in Hampton Roads, where employment has held up surprisingly well during the past year, actually saw employment fall by 100 jobs in March.

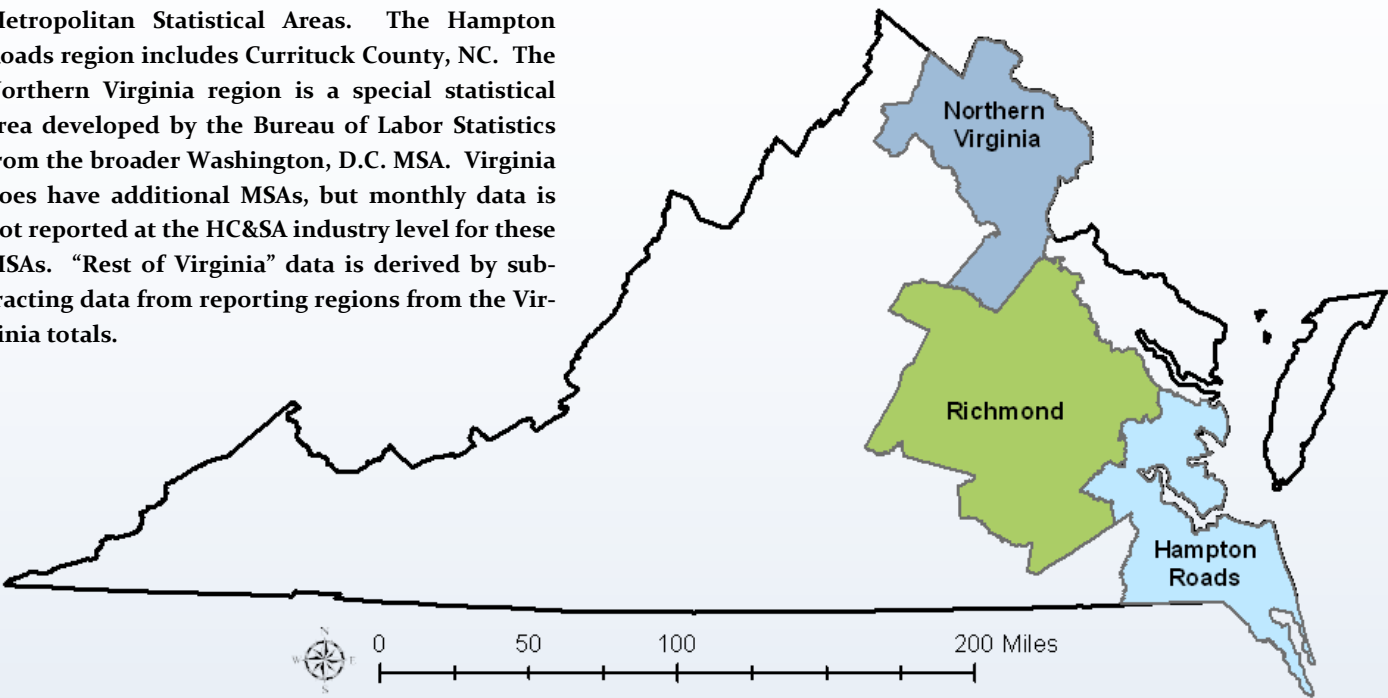
Share of 12-Month Growth by Subsector

Currently, Nursing & Residential Care Facilities has been responsible for 45% of all employment growth in Virginia's HC&SA sector over the previous 12 months, the most of any HC&SA subsector in the state. Although this is down from the multi-year high of 51% back in December 2013, it still represents an impressive improvement from the year-ago period, during which the subsector was responsible for only 7% of all HC&SA employment growth over the previous 12 months. Meanwhile, the Hospitals subsector saw its 12-month employment growth share did deeper into negative territory in March, falling from -3% to -5%. With this result, its growth share has now been in the red for six of the past eight months.

Figure 5: Share of Previous 12-Month Growth in Virginia's HC&SA Subsectors (Not Seasonally Adjusted).

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).