



Virginia Healthcare Workforce Briefs

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

Series 2, Issue 25

February 2014

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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 data also reflects annual BLS revisions that affect all results going back to April 2012.
- ◆ According to preliminary estimates, Virginia's Health Care & Social Assistance (HC&SA) sector lost 2,100 jobs in January. This represents the worst monthly performance for Virginia's HC&SA sector since last January.
- ◆ The majority of job losses in Virginia's HC&SA sector came from outside its three large metro areas. Whereas Hampton Roads and Richmond both managed to add HC&SA jobs in January, the Rest of Virginia lost 2,200 HC&SA jobs during the month. Meanwhile, Northern Virginia saw HC&SA employment decrease by 700 jobs.
- ◆ Ambulatory Health Care Services was the only HC&SA subsector that created jobs in January. Social Assistance was the weakest performer during the month, with 1,500 HC&SA jobs lost. Furthermore, Hospitals lost 800 jobs in January, while Nursing and Residential Care Facilities lost 300 jobs.

Data in Brief

| Not Seasonally Adjusted* | Employment, in Thousands | | | | Growth Rate, Annualized | | |
|--|--------------------------|-----------|-----------|-----------|-------------------------|---------|---------|
| | Jan. 2013 | Oct. 2013 | Dec. 2013 | Jan. 2014 | 12 Month | 3 Month | 1 Month |
| Virginia | | | | | | | |
| Total Nonfarm | 3,700.1 | 3,784.1 | 3,785.3 | 3,711.4 | 0.3% | -7.5% | -21.1% |
| Health Care & Social Assistance | 403.4 | 409.9 | 414.2 | 412.1 | 2.2% | 2.2% | -5.9% |
| Virginia Beach, Norfolk, Newport News | | | | | | | |
| Total Nonfarm | 738.0 | 750.7 | 753.7 | 735.8 | -0.3% | -7.7% | -25.1% |
| Health Care & Social Assistance | 85.7 | 87.1 | 88.9 | 89.5 | 4.4% | 11.5% | 8.4% |
| Northern Virginia | | | | | | | |
| Total Nonfarm | 1,351.8 | 1,374.7 | 1,377.6 | 1,355.0 | 0.2% | -5.6% | -18.0% |
| Health Care & Social Assistance | 113.0 | 114.3 | 115.5 | 114.8 | 1.6% | 1.8% | -7.0% |
| Richmond | | | | | | | |
| Total Nonfarm | 620.5 | 637.2 | 638.7 | 631.0 | 1.7% | -3.8% | -13.5% |
| Health Care & Social Assistance | 78.4 | 80.3 | 80.6 | 80.8 | 3.1% | 2.5% | 3.0% |
| Rest of Virginia | | | | | | | |
| Total Nonfarm | 989.9 | 1,021.5 | 1,015.3 | 989.6 | 0.0% | -11.9% | -26.5% |
| Health Care & Social Assistance | 126.3 | 128.2 | 129.2 | 127.0 | 0.6% | -3.7% | -18.6% |

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

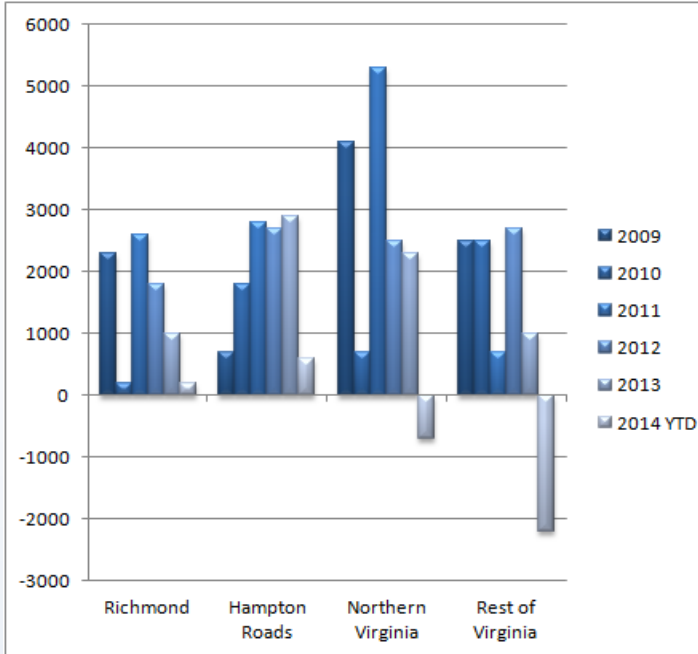


Figure 1: Annual Change in HC&SA Employment (Not Seasonally Adjusted, Change from Dec to Dec).

According to preliminary data released on March 17, 2014 by the U.S. Department of Labor, Bureau of Labor Statistics, Virginia's HC&SA sector lost 2,100 jobs in January. However, this loss was counterbalanced by an upward revision of 2,500 jobs to December's preliminary estimate for HC&SA employment.

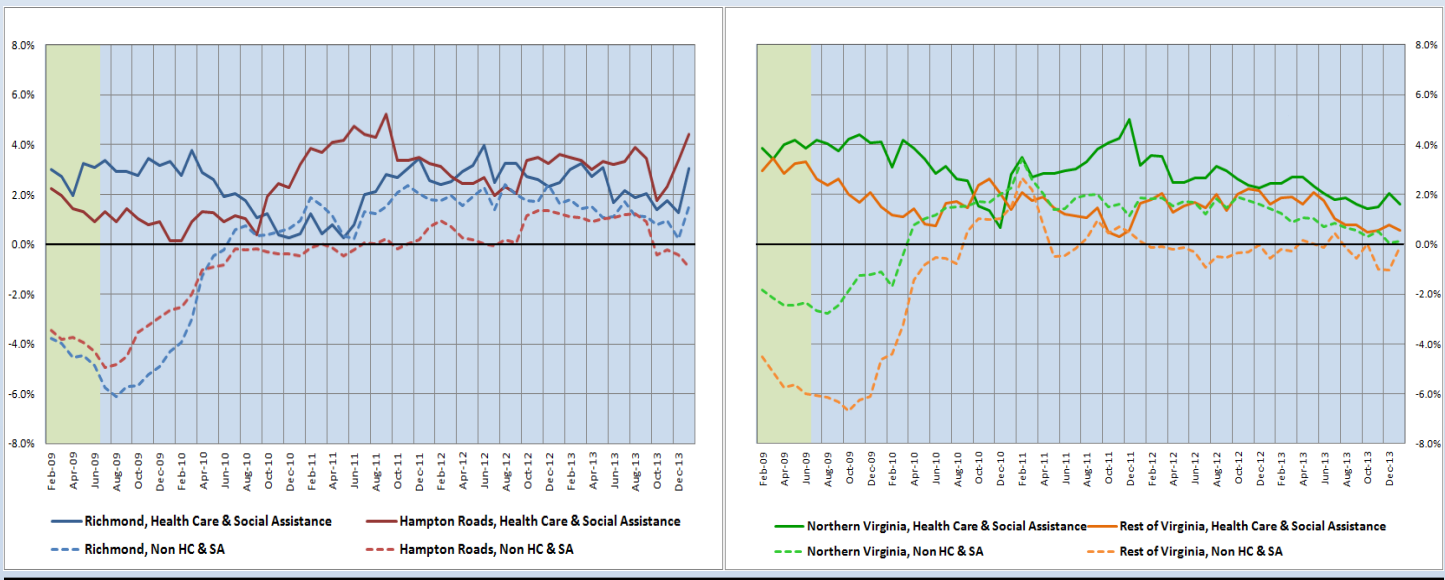
Despite experiencing the largest monthly loss of HC&SA jobs in one year, two of Virginia's four regions managed to increase HC&SA employment in January. Hampton Roads was the largest gainer, with HC&SA employment increasing by 600 jobs, while Richmond managed to increase its HC&SA payroll by 200 jobs. Most of January's job losses were concentrated in the Rest of Virginia, which lost 2,200 jobs during the month.

For all of 2013, Virginia's HC&SA sector increased employment by 7,200 jobs, which represents a decline of 26% relative to the job gains of the previous year. Hampton Roads was the most significant contributor to this growth, with 2,900 jobs added in 2013.

Year-Over-Year Regional Employment Growth

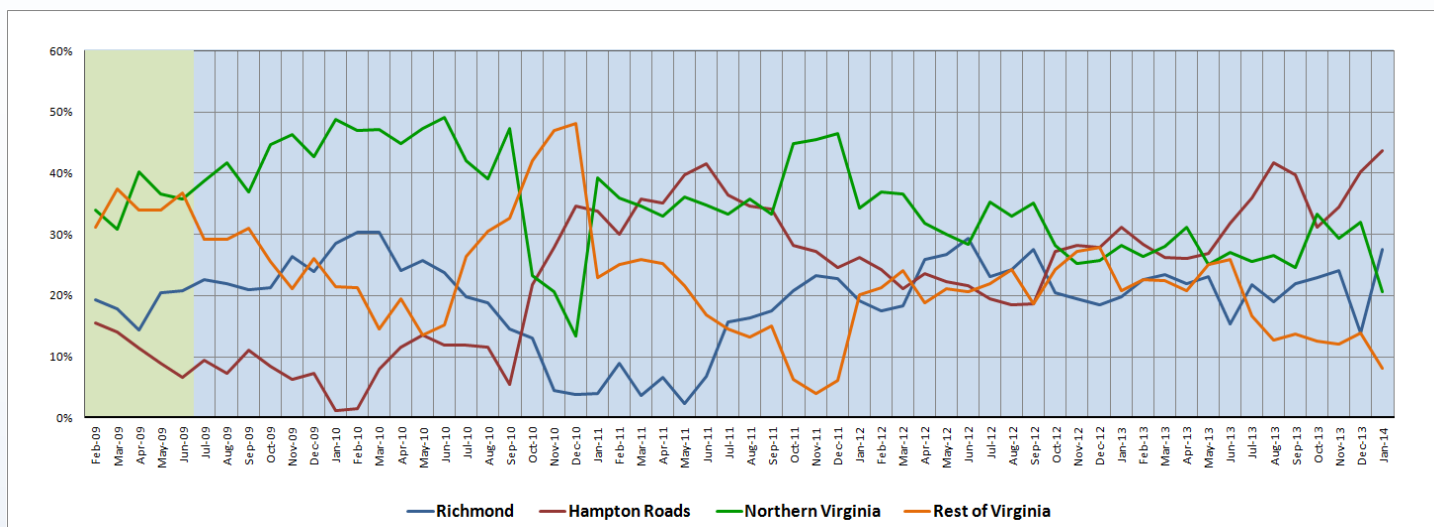
With respect to year-over-year HC&SA employment growth, Hampton Roads has been the fastest growing region in Virginia for more than a year. This trend continued in January as Hampton Roads saw a noticeable uptick in its year-over-year HC&SA employment growth rate to 4.4%, its highest level in more than two years. Richmond also experienced a large increase in its year-over-year HC&SA employment growth, which more than doubled to 3.1% during the month. In all four regions of Virginia, the year-over-year growth in HC&SA employment is higher than in the non-HC&SA sectors. This difference is most pronounced in Hampton Roads, whose non-HC&SA sectors are currently growing at a -0.9% rate.

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.



The annual BLS adjustments had a noticeable impact on the 12-month regional employment growth shares in Virginia's HC&SA sector, but the effect was most pronounced with respect to Northern Virginia. Previously, Northern Virginia's 12-month HC&SA employment growth share had been negative for four consecutive months, but this apparent regional weakness vanished with the latest revisions. For instance, preliminary estimates for December indicated that Northern Virginia's 12-month HC&SA employment growth share was -17.2%, but this figure increased to 32% after final revisions were made. Meanwhile, even after the BLS revisions, Hampton Roads continues to retain the largest 12-month regional growth share at 43.7%, reaching its highest level in more than a decade.

Subsector Employment Growth

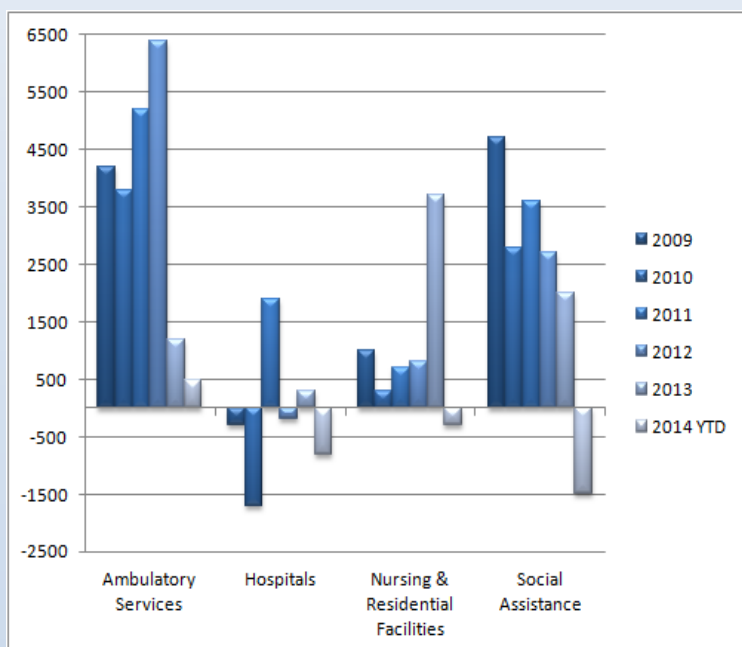


Figure 4: Annual & YTD Change in HC&SA Subsector Employment (Not Seasonally Adjusted, Dec. to Dec.)

In January, Ambulatory Health Care Services added 500 jobs to the state's economy. However, the other three HC&SA subsectors all experienced declines in employment during the month. These losses were most pronounced in Social Assistance, where job losses total 1,500. Meanwhile, Hospitals lost 800 jobs in January, and Nursing & Residential Care Facilities saw employment fall by 300 jobs during the month.

For all of 2013, every HC&SA subsector made positive contributions to annual employment totals despite the relatively weak year for the HC&SA sector and Virginia's economy as a whole. These gains were most pronounced in the Nursing & Residential Care Facilities subsector, which far eclipsed its totals from previous years by adding 3,700 jobs in 2013. The Hospitals subsector was the laggard for 2013, with just 300 total jobs created. However, Ambulatory Health Care Services saw the most dramatic year-over-year decline. In 2013, this subsector added 1,200 jobs, which represents a 81% decrease from the previous year.

Distribution of Growth by Subsector

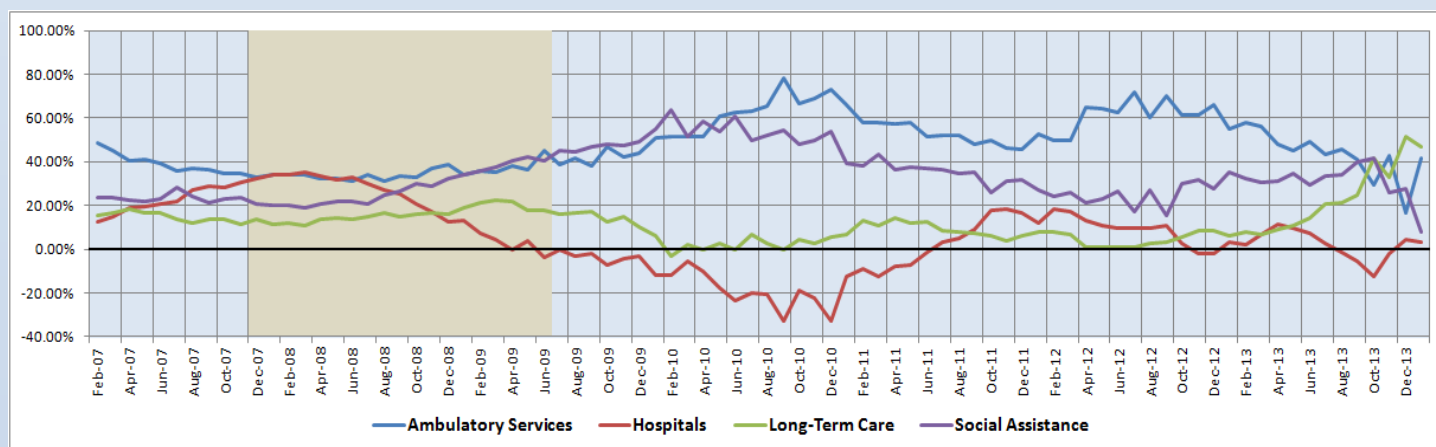
| Not Seasonally Adjusted | Employment, in Thousands | | | | Growth Rate, Annualized | | |
|--|--------------------------|-----------|-----------|-----------|-------------------------|---------|---------|
| | Jan. 2013 | Oct. 2013 | Dec. 2013 | Jan. 2014 | 12 Month | 3 Month | 1 Month |
| Virginia | | | | | | | |
| Health Care & Social Assistance | 403.4 | 409.9 | 414.2 | 412.1 | 2.2% | 2.2% | -5.9% |
| <i>Ambulatory Health Care Services</i> | 156.4 | 158.8 | 159.5 | 160.0 | 2.3% | 3.1% | 3.8% |
| <i>Hospitals</i> | 108.6 | 108.9 | 109.7 | 108.9 | 0.3% | 0.0% | -8.4% |
| <i>Nursing & Residential Care Facilities</i> | 69.9 | 72.1 | 74.3 | 74.0 | 5.9% | 11.0% | -4.7% |
| <i>Social Assistance</i> | 68.5 | 70.1 | 70.7 | 69.2 | 1.0% | -5.0% | -22.7% |
| Virginia Beach, Norfolk, Newport News | | | | | | | |
| Health Care & Social Assistance | 85.7 | 87.1 | 88.9 | 89.5 | 4.4% | 11.5% | 8.4% |
| <i>Hospitals</i> | 22.1 | 23.0 | 23.2 | 23.3 | 5.4% | 5.3% | 5.3% |
| Northern Virginia | | | | | | | |
| Health Care & Social Assistance | 113.0 | 114.3 | 115.5 | 114.8 | 1.6% | 1.8% | -7.0% |
| <i>Ambulatory Health Care Services</i> | 51.2 | 52.6 | 53.3 | 53.5 | 4.5% | 7.0% | 4.6% |
| <i>Hospitals</i> | 25.1 | 24.4 | 24.1 | 24.0 | -4.4% | -6.4% | -4.9% |

Preliminary estimates are italicized

Over the past 12 months, employment in Nursing & Residential Care Facilities has grown by nearly 6.0%, far exceeding the statewide average for the HC&SA sector. Its 3-month annualized employment growth rate is an even more impressive 11.0%. Meanwhile, the Hospitals subsector has experienced little employment growth over the past 12 months, with only 300 new jobs created since last January. However, there are significant regional differences with respect to employment growth in the Hospitals subsector. For instance, Hampton Roads has seen employment in its Hospitals subsector increase by 1,200 jobs, while Northern Virginia has seen Hospital employment decrease by nearly the same amount.

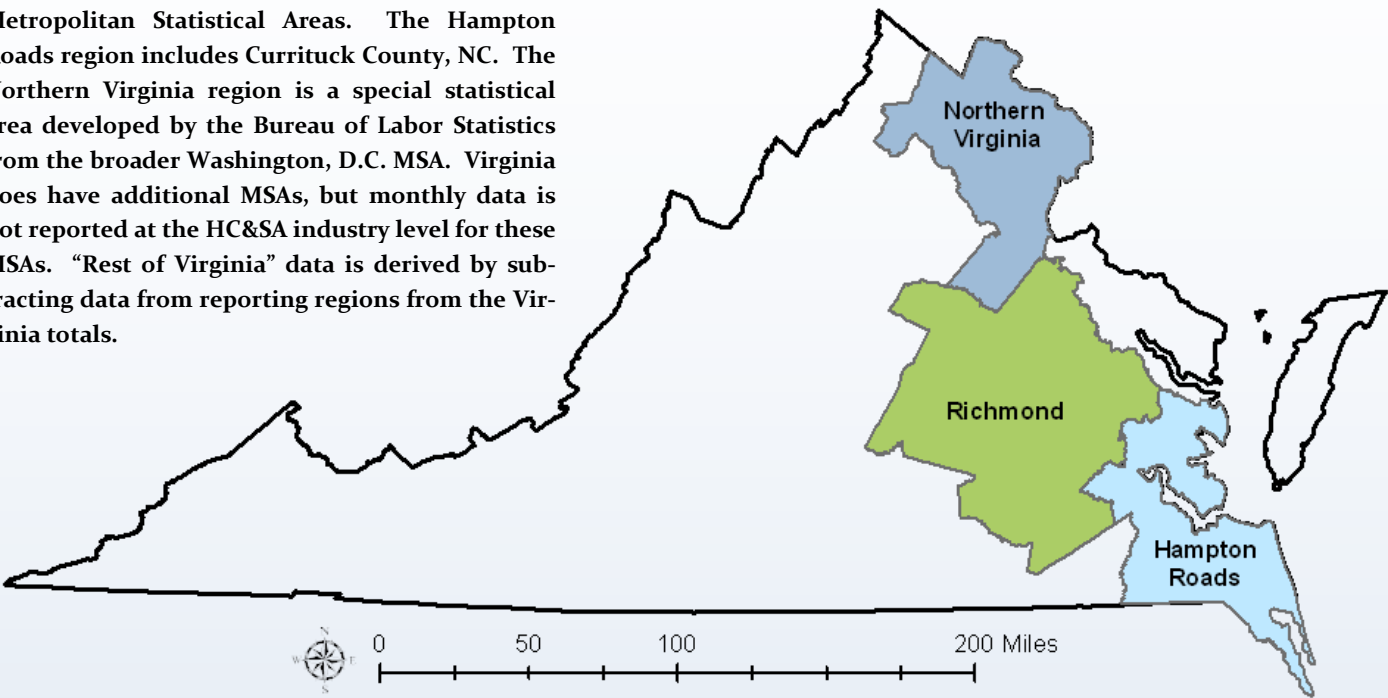
Share of 12-Month Growth by Subsector

Nearly 90% of Virginia's HC&SA employment growth over the past 12 months has been driven by just two subsectors: Nursing & Residential Care Facilities and Ambulatory Health Care Services. Employment growth has been particularly strong in the Nursing & Residential Care Facilities subsector. Last January, the subsector's previous 12-month HC&SA employment growth share was just 6.3%, but this figure has increased to 47.1% today. Alternatively, the Social Assistance subsector has seen its 12-month employment growth share decline considerably over the same time period, falling from 35.4% last January to just 8.1% today.

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).