



Virginia Healthcare Workforce Briefs

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

Series 2, Issue 28

May 2014

Inside this Brief:

Regional Employment Growth	2
Regional HC&SA Share	3
Subsector Employment Growth	3
Subsector HC&SA Share	4
Region Map	5
About the Data	6

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 lost 1,000 jobs in April. Meanwhile, March's preliminary estimate for HC&SA employment was revised downward by 700 jobs. Even with this revision, however, Virginia's HC&SA sector added 2,400 jobs in March.
- ◆ Richmond was the only region in Virginia that added HC&SA jobs in April. In fact, despite the overall job losses in Virginia's HC&SA sector, Richmond had its best month in nearly three years. Meanwhile, the Rest of Virginia lost 900 HC&SA jobs, Hampton Roads lost 800 HC&SA jobs, and Northern Virginia lost 600 HC&SA jobs.
- ◆ With 700 jobs added, Social Assistance was the only HC&SA subsector to increase employment in April. Nursing & Residential Care Facilities experienced the worst employment declines, losing 800 HC&SA jobs in April, while Hospitals lost 600 jobs and Ambulatory Health Care Services lost 300 jobs.

Data in Brief

Not Seasonally Adjusted*	Employment, in Thousands				Growth Rate, Annualized		
	Apr. 2013	Jan. 2014	Mar. 2014	Apr. 2014	12 Month	3 Month	1 Month
Virginia							
Total Nonfarm	3,768.6	3,715.0	3,741.5	3,768.0	0.0%	5.8%	8.8%
Health Care & Social Assistance	407.1	412.4	413.8	412.8	1.4%	0.4%	-2.9%
Virginia Beach, Norfolk, Newport News							
Total Nonfarm	752.1	736.8	744.8	749.7	-0.3%	7.2%	8.2%
Health Care & Social Assistance	86.2	89.3	89.8	89.0	3.2%	-1.3%	-10.2%
Northern Virginia							
Total Nonfarm	1,366.3	1,356.8	1,358.9	1,367.7	0.1%	3.3%	8.1%
Health Care & Social Assistance	114.0	114.8	114.3	113.7	-0.3%	-3.8%	-6.1%
Richmond							
Total Nonfarm	633.0	632.7	638.7	643.5	1.7%	7.0%	9.4%
Health Care & Social Assistance	79.5	81.6	82.6	83.9	5.5%	11.8%	20.6%
Rest of Virginia							
Total Nonfarm	1,017.2	988.7	999.1	1,007.1	-1.0%	7.7%	10.0%
Health Care & Social Assistance	127.4	126.7	127.1	126.2	-0.9%	-1.6%	-8.2%

Preliminary estimates are italicized

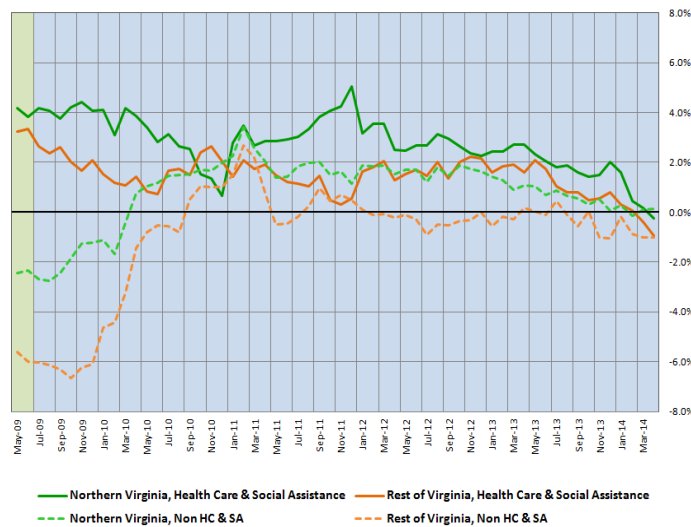
*Seasonally adjusted data is adjusted by the Bureau of Labor Statistics to account for weather and other seasonal changes. Since the US Bureau of Labor Statistics does not provide seasonally adjusted data at this level, this series uses **non**-seasonally adjusted data exclusively. Seasonal variation 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.

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

For the first time in a decade, the year-over-year employment growth rate in Northern Virginia's HC&SA sector went negative, falling to -0.3% in April. Regardless, Northern Virginia is still not the slowest-growing region in Virginia with respect to year-over-year HC&SA employment growth; the Rest of Virginia's HC&SA employment growth rate, which dipped into negative territory in March, fell even further in April to -0.9%. In short, employment growth in both Northern Virginia and the Rest of Virginia has completely dried up over the past several months. At the same time, however, Richmond's HC&SA employment growth rate has skyrocketed to 5.5%, its highest value since November 2008.

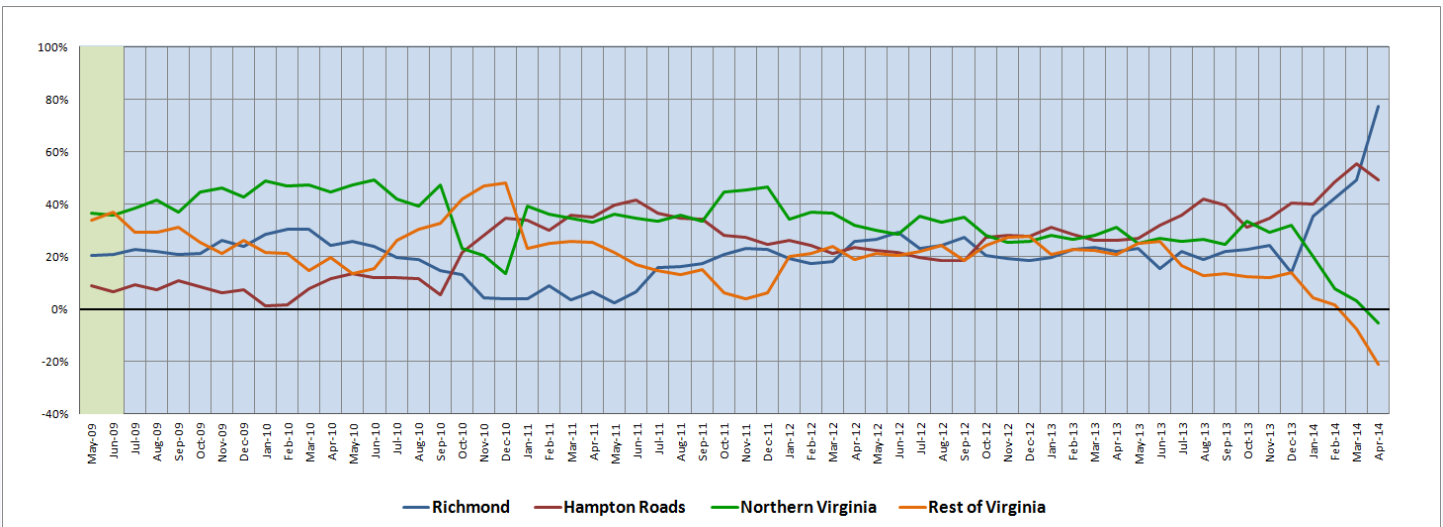
— Richmond, Health Care & Social Assistance — Hampton Roads, Health Care & Social Assistance
 - - - Richmond, Non HC & SA - - - Hampton Roads, Non HC & SA

Virginia's HC&SA sector has been hurt by job losses in Northern Virginia and the Rest of Virginia. These losses are especially significant in the Rest of Virginia, where HC&SA employment has fallen by 3,000 jobs so far in 2014. Given the job losses elsewhere, the resiliency of Richmond's HC&SA sector has been impressive. Not only did Richmond's HC&SA sector add 1,300 jobs in April, the region has already exceeded its full-year results of each of the past five years.



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.



Given the strong employment growth in Richmond's HC&SA sector, the region's 12-month HC&SA employment growth share jumped from 49.3% in March to 77.2% in April. With this dramatic increase, Richmond's HC&SA sector is now responsible for more statewide HC&SA employment growth over the past 12 months than any region at any point since at least 2003. In fact, Richmond shattered the previous high, which had been achieved by Richmond itself back in December 2003, when it reached a 12-month HC&SA employment growth share of 60.0%. Meanwhile, Hampton Roads' HC&SA employment growth share, although down from March, is still strong at 49.1%. Northern Virginia and the Rest of Virginia, on the other hand, continued their precipitous downward slides, with both regions currently sporting negative growth shares.

Subsector Employment Growth

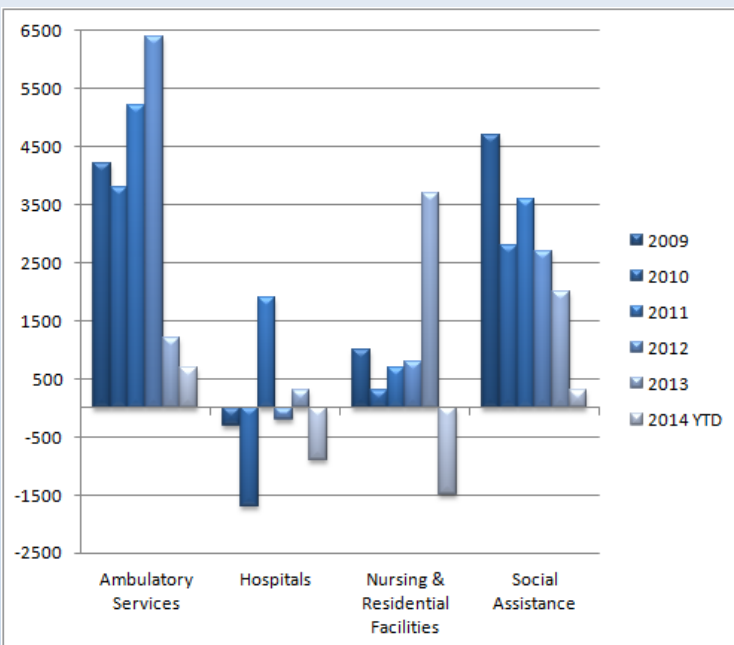


Figure 4: Annual & YTD Change in HC&SA Subsector Employment (Not Seasonally Adjusted, Dec. to Dec.)

Whereas all four of Virginia's HC&SA subsectors experienced employment gains in March, only Social Assistance managed to add to those job gains in April. In a month where the overall HC&SA sector lost 1,000 jobs, the Social Assistance subsector gained 700 jobs. Alternatively, Nursing & Residential Care Facilities, April's worst performer, lost 800 jobs during the month. Meanwhile, Hospitals shed 600 HC&SA jobs in April, while employment fell by 300 jobs in Ambulatory Health Care Services.

As the only HC&SA subsector with monthly job gains in April, Social Assistance saw its year-to-date job gains turn positive for the first time in 2014 this month, although these gains amount to a relatively modest increase in employment of 300 jobs. Ambulatory Health Care Services continues to produce the most year-to-date jobs in the HC&SA sector, but these gains have been wiped out by losses in Hospitals, which has lost 900 year-to-date jobs, and Nursing & Residential Care Facilities, where employment has fallen by 1,500 jobs so far in 2014.

Distribution of Growth by Subsector

Not Seasonally Adjusted	Employment, in Thousands				Growth Rate, Annualized		
	Apr. 2013	Jan. 2014	Mar. 2014	Apr. 2014	12 Month	3 Month	1 Month
Virginia							
Health Care & Social Assistance	407.1	412.4	413.8	412.8	1.4%	0.4%	-2.9%
<i>Ambulatory Health Care Services</i>	158.1	159.9	160.5	160.2	1.3%	0.8%	-2.2%
<i>Hospitals</i>	109.5	108.6	109.4	108.8	-0.6%	0.7%	-6.4%
<i>Nursing & Residential Care Facilities</i>	70.3	73.9	73.6	72.8	3.6%	-5.8%	-12.3%
<i>Social Assistance</i>	69.2	70.0	70.3	71.0	2.6%	5.8%	12.6%
Virginia Beach, Norfolk, Newport News							
Health Care & Social Assistance	86.2	89.3	89.8	89.0	3.2%	-1.3%	-10.2%
<i>Hospitals</i>	22.6	23.2	22.9	22.8	0.9%	-6.7%	-5.1%
Northern Virginia							
Health Care & Social Assistance	114.0	114.8	114.3	113.7	-0.3%	-3.8%	-6.1%
<i>Ambulatory Health Care Services</i>	52.1	53.4	53.0	52.9	1.5%	-3.7%	-2.2%
<i>Hospitals</i>	25.3	24.0	24.4	24.0	-5.1%	0.0%	-18.0%

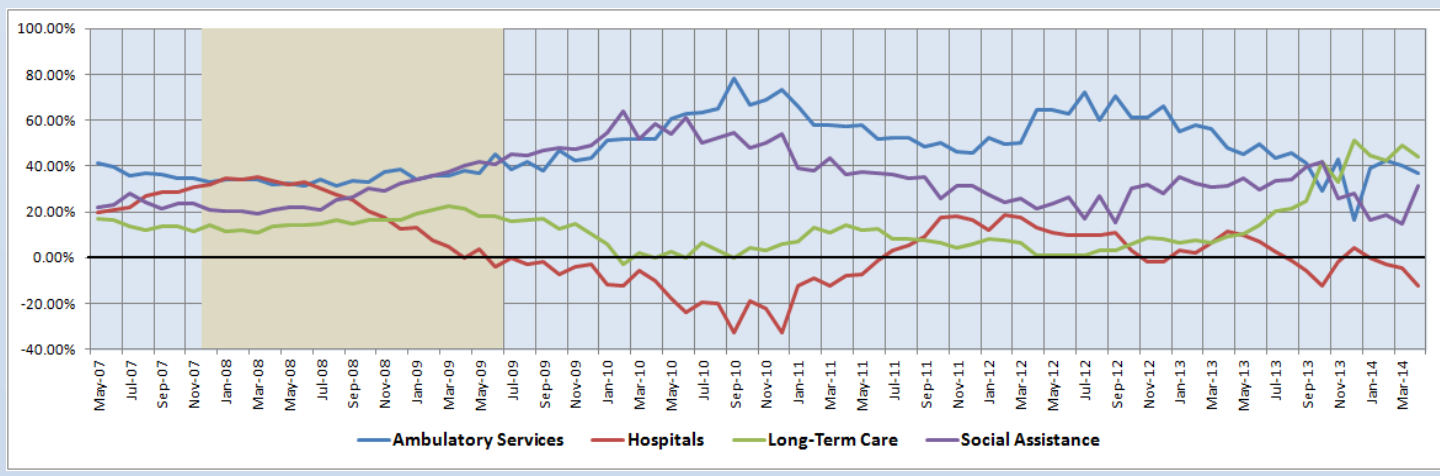
Preliminary estimates are italicized

Nursing & Residential Care Facilities continue to sport the fastest 12-month employment growth rate at 3.6%, although this is down from the 4.7% 12-month growth rate observed in March. Social Assistance is the only other subsector that currently has a 12-month employment growth rate that exceeds the sector-wide average of 1.4%. However, whereas short-term employment growth in Nursing & Residential Care Facilities is weaker, the Social Assistance subsector has benefited from very strong short-term employment growth. For instance, Nursing & Residential Care Facilities has the lowest 3-month annualized growth rate at -5.8%, while Social Assistance has the highest three-month annualized growth rate at 5.8%.

Share of 12-Month Growth by Subsector

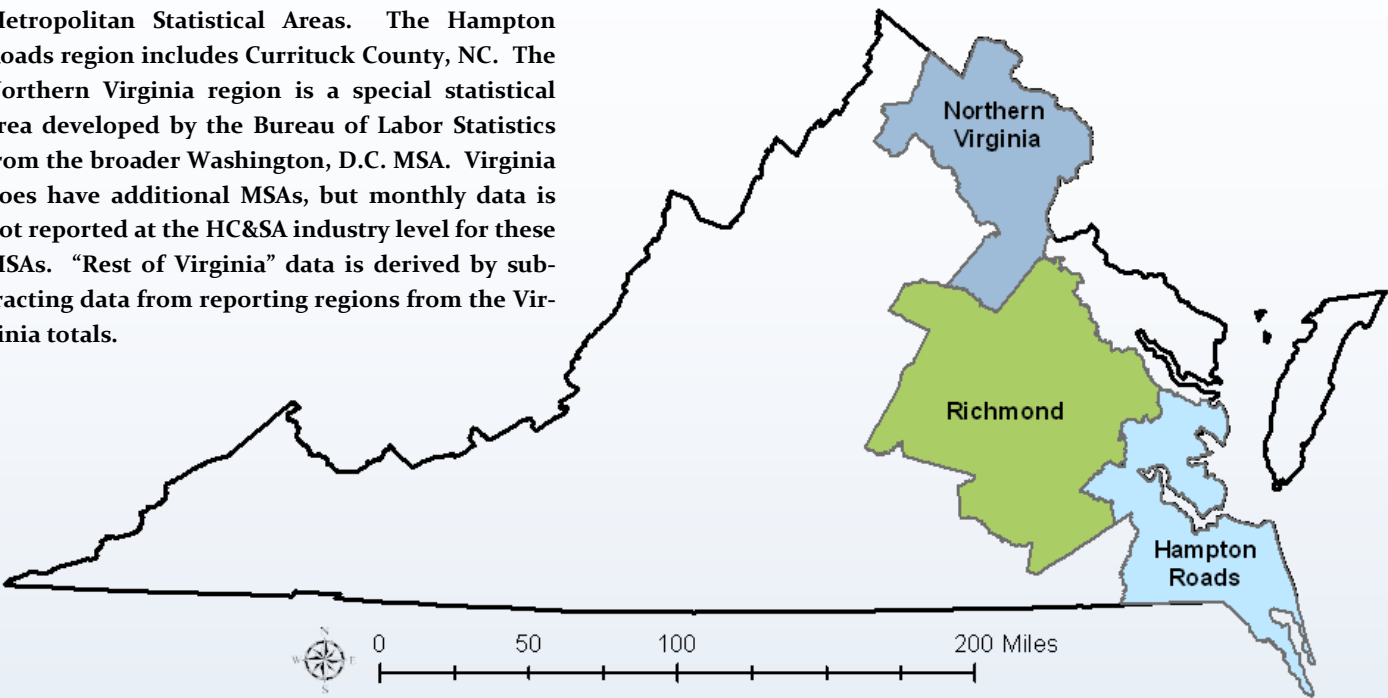
Thanks in part to April's employment gains, Social Assistance was the only HC&SA subsector to increase its 12-month employment growth share in April. In fact, its growth share more than doubled from 14.9% in March to 31.6% this month. Despite this dramatic increase, however, it still only has the third-largest share of 12-month employment growth among the four HC&SA subsectors in Virginia. The two HC&SA subsectors with higher growth shares, Nursing & Residential Care Facilities and Ambulatory Health Care Services, are currently responsible for, respectively, 43.9% and 36.8% of all employment growth over the previous 12 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).