



Virginia Healthcare Workforce Briefs

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

Series 2, Issue 16

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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

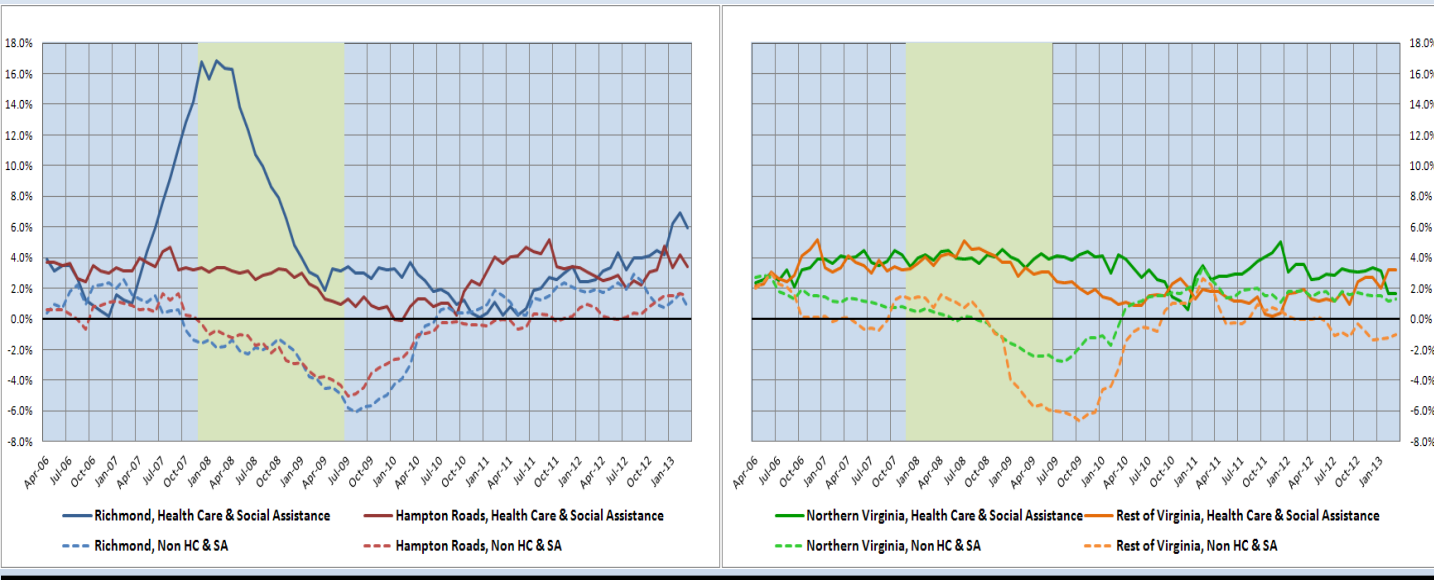
- ◆ Data in this series is not seasonally adjusted and exhibits short-term volatility from fluctuations in holidays, weekends, weather and other seasonal factors. Estimates for the most recent month are preliminary.
- ◆ According to preliminary estimates, Virginia's HC&SA sector added 200 jobs in March on a non-seasonally adjusted basis, which represents a one-month annualized growth rate of 0.6%.
- ◆ February's preliminary estimate for HC&SA employment was revised downward by 500 jobs. With this revision, employment in Virginia's HC&SA sector added 2,100 jobs in the previous month.
- ◆ Regional employment growth was mixed in March. While Northern Virginia and the Rest of Virginia both added 500 HC&SA jobs during the month, Richmond and Hampton Roads lagged behind by losing a combined 800 HC&SA jobs.
- ◆ Employment growth was also mixed when broken down by HC&SA subsector. The Hospitals and Social Assistance subsectors added 1,400 jobs in March, but these gains were mitigated by the loss of 1,200 jobs in Ambulatory Health Care Services and Nursing & Residential Care Facilities.

Data in Brief

Not Seasonally Adjusted*	Employment, in Thousands				Growth Rate, Annualized		
	Mar. 2012	Dec. 2012	Feb. 2013	Mar. 2013	12 Month	3 Month	1 Month
Virginia							
Total Nonfarm	3,697.7	3,762.6	3,707.8	3,731.7	0.9%	-3.2%	8.0%
Health Care & Social Assistance	388.1	403.0	400.9	401.1	3.3%	-1.9%	0.6%
Virginia Beach, Norfolk, Newport News							
Total Nonfarm	735.2	754.5	743.0	747.7	1.7%	-3.6%	7.9%
Health Care & Social Assistance	81.8	85.6	84.9	84.6	3.4%	-4.6%	-4.2%
Northern Virginia							
Total Nonfarm	1,340.5	1,371.5	1,348.4	1,358.4	1.3%	-3.8%	9.3%
Health Care & Social Assistance	108.7	112.0	110.0	110.5	1.7%	-5.3%	5.6%
Richmond							
Total Nonfarm	616.1	627.4	624.2	624.8	1.4%	-1.6%	1.2%
Health Care & Social Assistance	75.5	79.7	80.5	80.0	6.0%	1.5%	-7.2%
Rest of Virginia							
Total Nonfarm	1,005.9	1,009.2	992.2	1,000.8	-0.5%	-3.3%	10.9%
Health Care & Social Assistance	122.1	125.7	125.5	126.0	3.2%	1.0%	4.9%

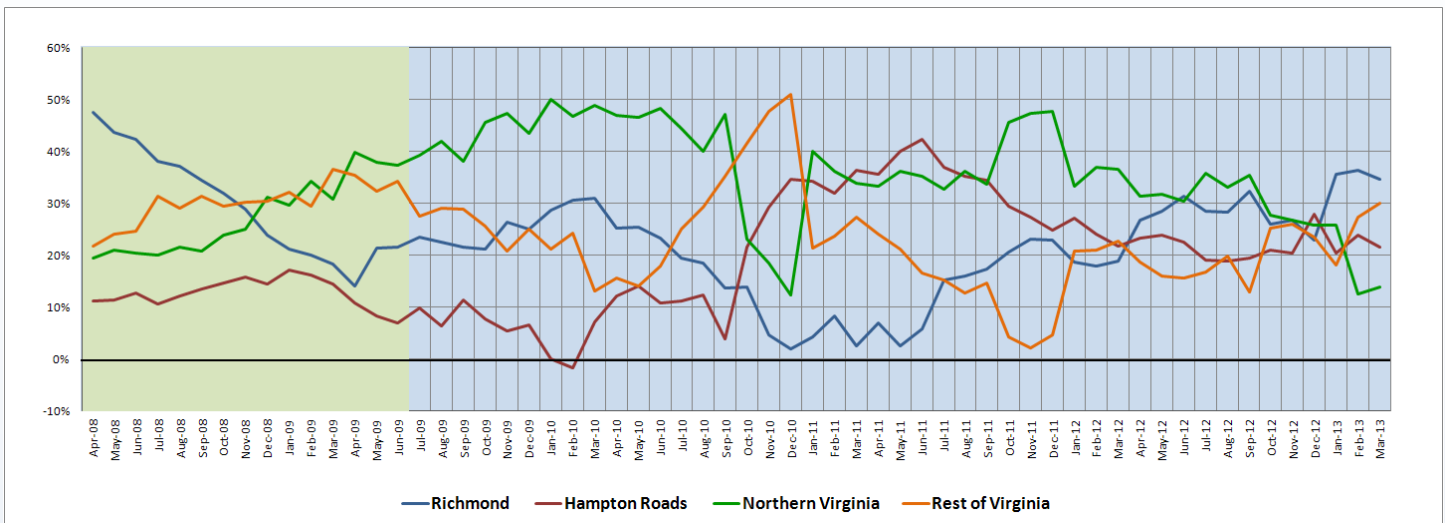
Preliminary estimates are italicized

*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 Share of 12-month Growth

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

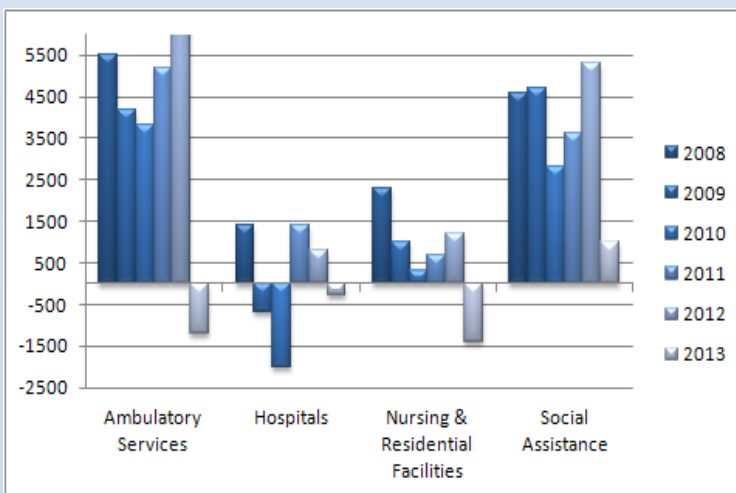


Richmond and the Rest of Virginia are currently the most significant drivers of employment growth in the HC&SA sector. Combined, these two regions account for nearly two-thirds of total employment gains in the previous 12 months. The growth in share from the Rest of Virginia has been especially pronounced in the past several months. In January, the Rest of Virginia only had an 18% share of HC&SA employment growth, but this has grown to a 30% share in just two months. During the same time period, Northern Virginia has seen its employment share fall by nearly half from 26% to 14%. Meanwhile, Richmond and Hampton Roads have seen their growth shares stabilize in recent months. For the third consecutive month, Richmond has remained the strongest region in the state by accounting for more than one-third of all growth.

Subsector Employment Growth

HC&SA employment growth across subsectors was decidedly mixed in March. The Hospitals and Social Assistance subsectors experienced strong growth during the month, adding 800 and 600 jobs, respectively. However, the Ambulatory Health Care Services and Nursing & Residential Care Facilities subsectors wiped out most of those gains, losing 700 and 500 jobs, respectively. The net result was a combined net increase of just 200 HC&SA jobs in March.

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



During the first quarter of 2013, three of Virginia's four subsectors lost jobs. Job losses were particularly pronounced in the Nursing & Residential Care Facilities subsector, which currently sports a three-month annualized growth rate of -7.7%. Furthermore, the subsector has experienced no employment growth in the past year, making it slowest growing subsector during that time period. Only the Social Assistance subsector managed to buck the trend, adding 1,000 jobs so far during the year. Unlike the other subsectors, the Social Assistance subsector has enjoyed strong growth in both short-term and long-term employment. With 600 jobs added in March, the subsector sports a one-month annualized growth of more than 10%, while its year-over-year growth rate is an impressive 9.5%.

Distribution of Growth by Subsector

Not Seasonally Adjusted	Employment, in Thousands				Growth Rate, Annualized		
	Mar. 2012	Dec. 2012	Feb. 2013	Mar. 2013	12 Month	3 Month	1 Month
Virginia							
Health Care & Social Assistance	388.1	403.0	400.9	401.0	3.3%	-1.9%	0.6%
<i>Ambulatory Health Care Services</i>	151.8	158.6	158.1	157.4	3.7%	-3.0%	-5.2%
<i>Hospitals</i>	100.7	102.1	101.0	101.8	1.1%	-1.2%	9.9%
<i>Nursing & Residential Care Facilities</i>	69.6	71.0	70.1	69.6	0.0%	-7.7%	-8.2%
<i>Social Assistance</i>	66.0	71.3	71.7	72.3	9.5%	5.7%	10.5%
Virginia Beach, Norfolk, Newport News							
Health Care & Social Assistance	81.8	85.6	84.9	84.6	3.4%	-4.6%	-4.2%
<i>Hospitals</i>	20.2	21.0	20.7	20.8	3.0%	-3.8%	6.0%
Northern Virginia							
Health Care & Social Assistance	108.7	112.0	110.0	110.5	1.7%	-5.3%	5.6%
<i>Ambulatory Health Care Services</i>	49.3	51.6	50.7	49.9	1.2%	-12.5%	-17.4%
<i>Hospitals</i>	23.3	22.8	22.8	23.4	0.4%	10.9%	36.6%

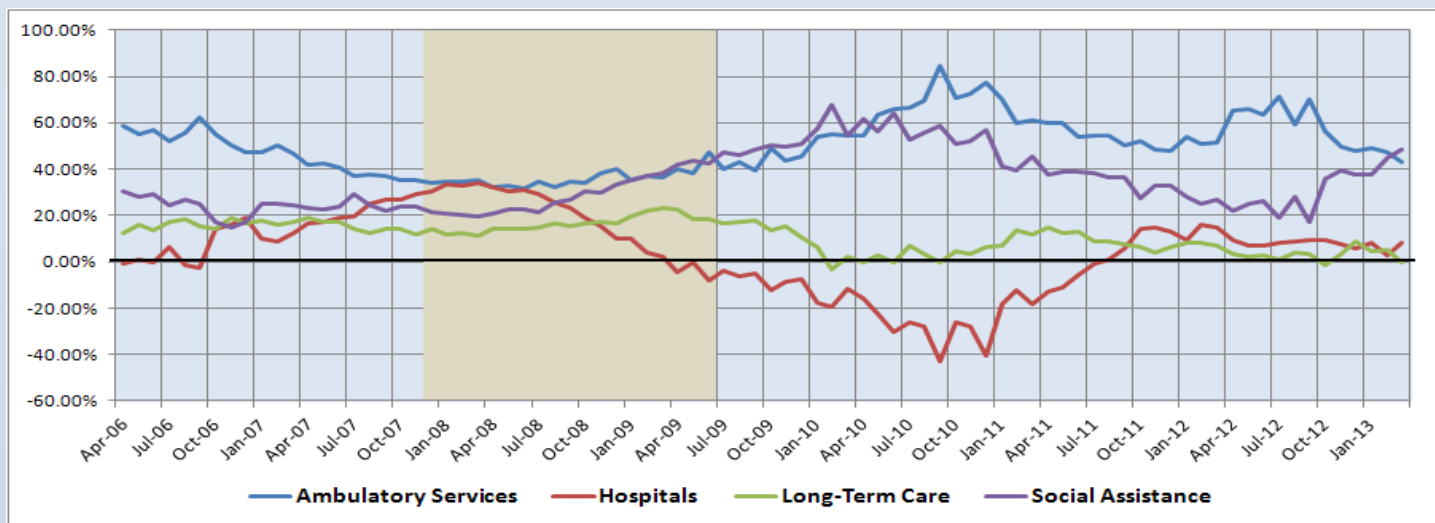
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Employment growth in the Hospitals subsector was driven almost entirely by the strong gains in Hampton Roads and Northern Virginia in March. The growth was especially significant in Northern Virginia, which was responsible for fully three-quarters of the employment growth in the Hospitals subsector during the month. This addition of 600 Hospital jobs in Northern Virginia translates to a 36.6% annualized growth rate. Alternatively, Northern Virginia was solely responsible for the losses in the Ambulatory Health Care Services subsector; while the subsector lost only 700 jobs statewide, 800 jobs were lost in Northern Virginia alone. This translates to a -17.4% annualized growth rate.

Share of 12-Month Growth by Subsector

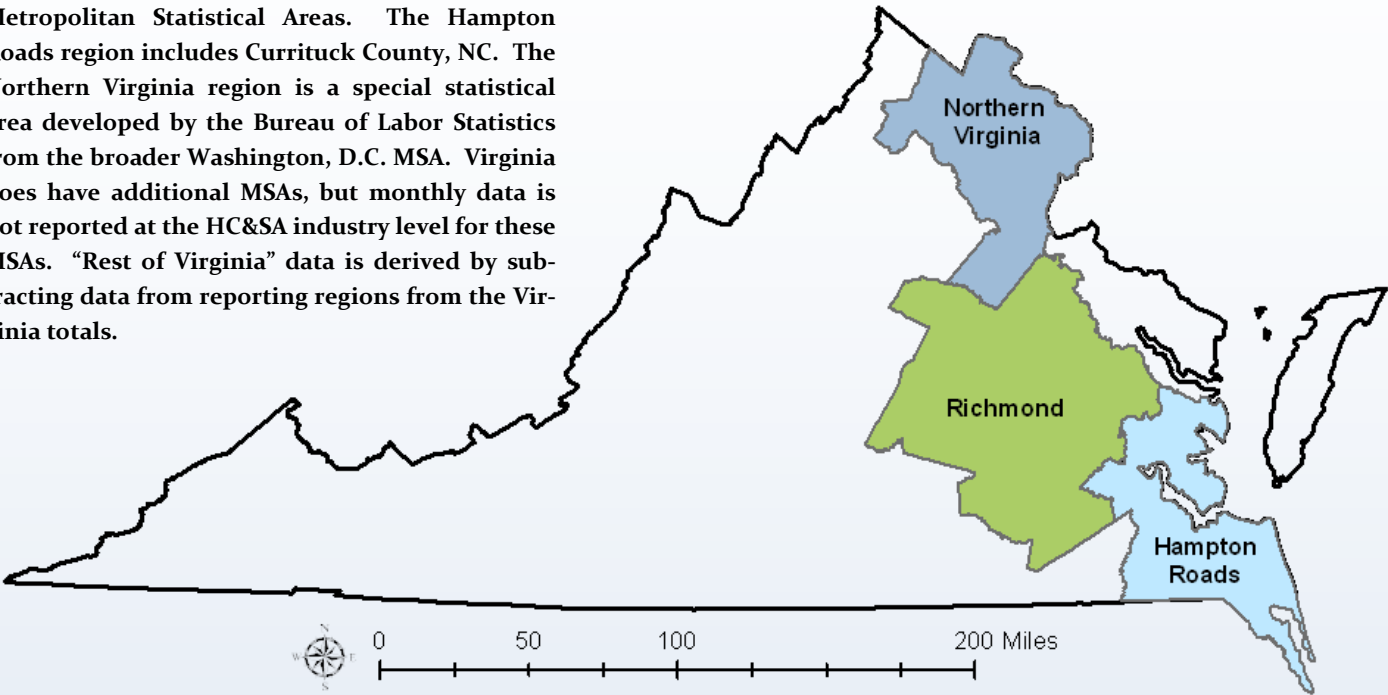
Thanks to the continued strength in the Social Assistance subsector in recent months, it has overtaken the Ambulatory Services subsector as the single largest contributor to 12-month employment growth. In March, the share of employment growth that is attributable to the Social Assistance subsector rose to 48.5%, while the share attributable to the Ambulatory Services subsector fell once again to just 43.1%. This represents the first time since April 2010 that Ambulatory Services has not been the largest contributor to 12-month HC&SA employment growth.

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		Currituck, NC	Virginia Beach
Warren		Henrico			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).