



Virginia Healthcare Workforce Briefs

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

Series 2, Issue 24

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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 2,000 jobs in December. With December's results included, Virginia's HC&SA sector has added jobs in six of the past seven months.
- ◆ November's preliminary result for HC&SA employment was revised downward by 700 jobs. Even with this revision, however, Virginia's HC&SA sector added 2,200 jobs in November.
- ◆ Hampton Roads and the Rest of Virginia were the largest contributors to HC&SA employment growth in December, with each region adding 800 jobs. Only Richmond failed to add jobs in the HC&SA sector last month.
- ◆ The Hospitals subsector was the main driver of HC&SA employment growth in December, adding 900 new jobs to the state's economy. Meanwhile, Social Assistance and Nursing & Residential Care Facilities combined to add 1,100 HC&SA jobs.

Data in Brief

Not Seasonally Adjusted*	Employment, in Thousands				Growth Rate, Annualized		
	Dec. 2012	Sept. 2013	Nov. 2013	Dec. 2013	12 Month	3 Month	1 Month
Virginia							
Total Nonfarm	3,762.6	3,779.4	3,800.1	3,793.8	0.8%	1.5%	-2.0%
Health Care & Social Assistance	403.0	407.8	409.7	411.7	2.2%	3.9%	6.0%
Virginia Beach, Norfolk, Newport News							
Total Nonfarm	754.5	765.6	762.6	763.7	1.2%	-1.0%	1.7%
Health Care & Social Assistance	85.6	87.9	88.4	89.2	4.2%	6.0%	11.4%
Northern Virginia							
Total Nonfarm	1,371.5	1,369.6	1,383.6	1,382.1	0.8%	3.7%	-1.3%
Health Care & Social Assistance	112.0	109.3	109.8	110.5	-1.3%	4.5%	7.9%
Richmond							
Total Nonfarm	627.4	633.7	639.8	637.0	1.5%	2.1%	-5.1%
Health Care & Social Assistance	79.7	82.8	83.0	82.7	3.8%	-0.5%	-4.3%
Rest of Virginia							
Total Nonfarm	1,009.2	1,010.5	1,014.1	1,011.0	0.2%	0.2%	-3.6%
Health Care & Social Assistance	125.7	127.8	128.5	129.3	2.9%	4.8%	7.7%

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

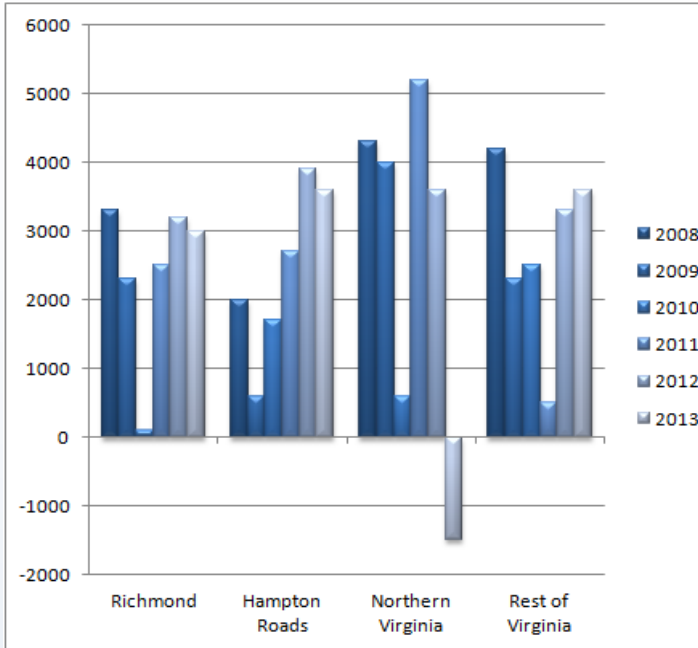


Figure 1: Annual Change in HC&SA Employment (Not Seasonally Adjusted, Change from Dec to Dec).

According to preliminary estimates, Virginia's HC&SA sector added 2,000 jobs in December. Meanwhile, November's preliminary estimate for HC&SA employment was revised downward by 700 jobs. With this revision, HC&SA employment still increased by 2,200 jobs in November.

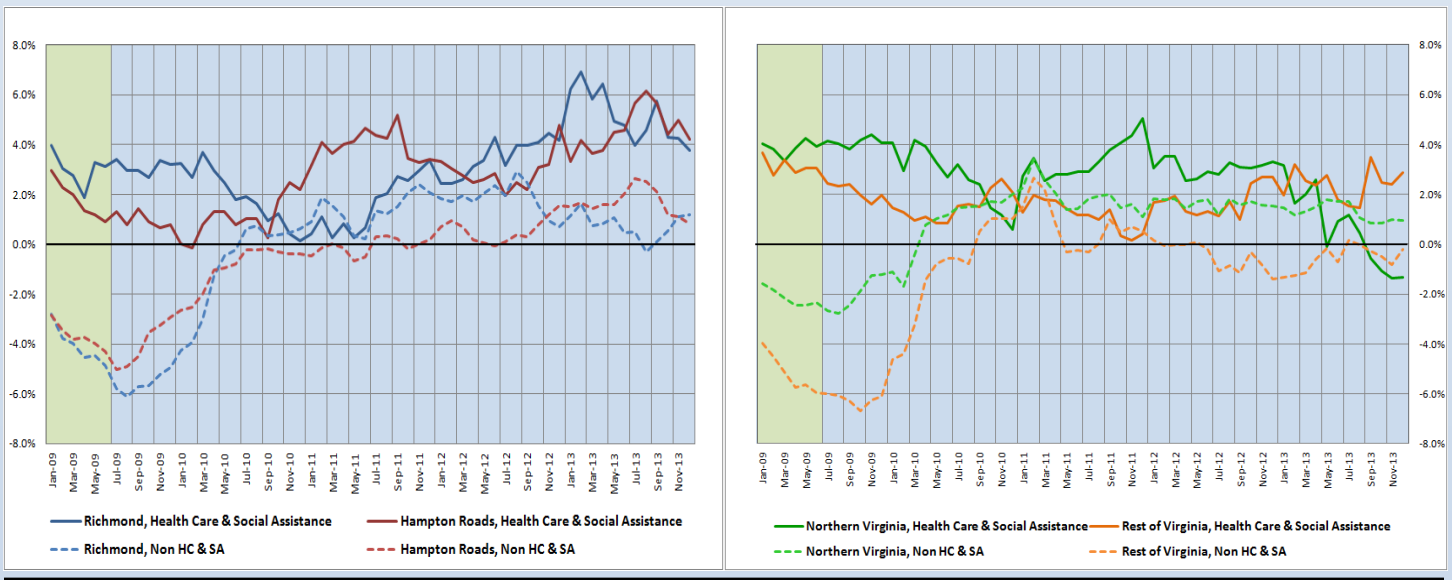
In 2013, Virginia's HC&SA sector added 8,700 jobs to the state's economy. When compared to prior years, 2013 represents a bit of a slow down in the strength of employment growth in the HC&SA sector. In 2012, for instance, the HC&SA sector added 14,000 jobs, while employment increased by 10,900 jobs in 2011.

Regional HC&SA employment growth was strong across most of Virginia in 2013. For instance, Hampton Roads, Richmond and the Rest of Virginia all managed to add at least 3,000 HC&SA jobs in 2013. However, Northern Virginia actually experienced a drop in HC&SA employment of 1,500 jobs during the year. This represents the first time in more than a decade that an entire region of Virginia has seen HC&SA employment fall over the course of a full year.

Year-Over-Year Regional Employment Growth

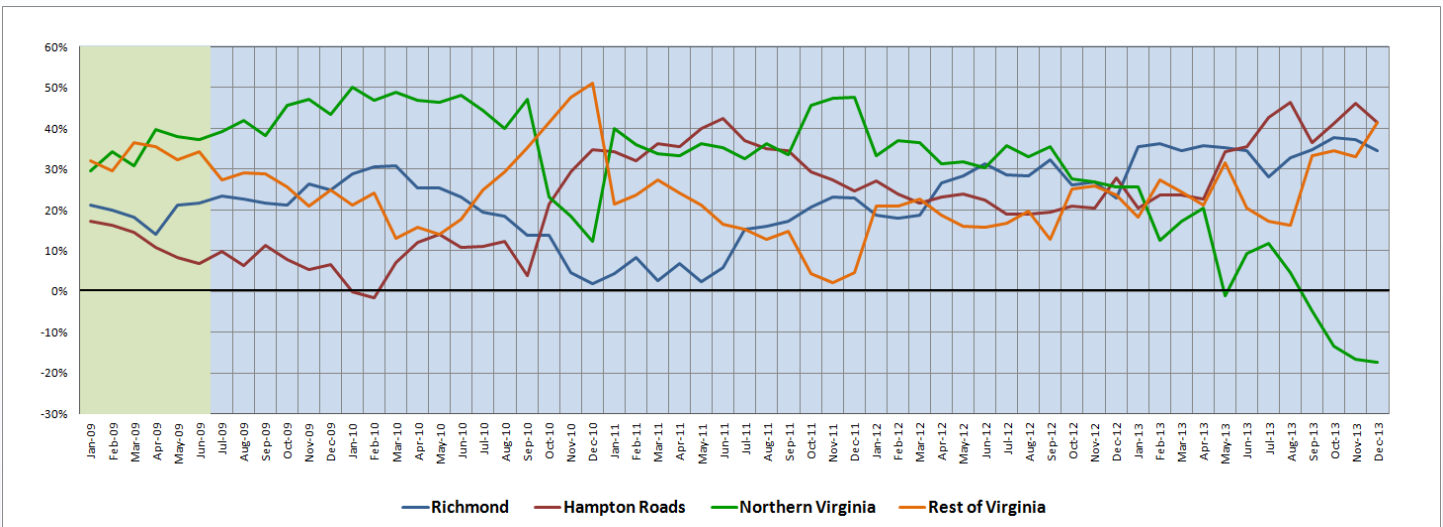
Although Hampton Roads and Richmond continue to sport strong year-over-year HC&SA employment growth rates, this growth has been decelerating throughout the second half of the year. In December, Hampton Roads' year-over-year HC&SA employment growth rate fell from 4.99% to 4.21%, while Richmond's year-over-year HC&SA employment growth rate fell from 4.27% to 3.76%. The year-over-year HC&SA employment growth rate for Hampton Roads has now fallen to its lowest level since April 2013, while Richmond's year-over-year rate has now reached lows not seen since July 2012. Meanwhile, Northern Virginia's year-over-year growth rate has been negative for four consecutive months.

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.



In December, the Rest of Virginia was the only region in the state to increase its regional share of 12-month employment growth in the HC&SA sector. The Rest of Virginia saw its share increase from 32.97% to 41.38%, reaching its highest level for the region since December 2010. In addition, the Rest of Virginia is now tied with Hampton Roads for controlling the largest regional share of the previous 12-month growth in HC&SA employment. Meanwhile, the regional 12-month HC&SA employment growth share that is attributable to Northern Virginia continued its precipitous decline in December, falling yet again from -16.48% to -17.24%. None of Virginia's four regions have seen its 12-month HC&SA employment growth share fall this low in more than a decade.

Subsector Employment Growth

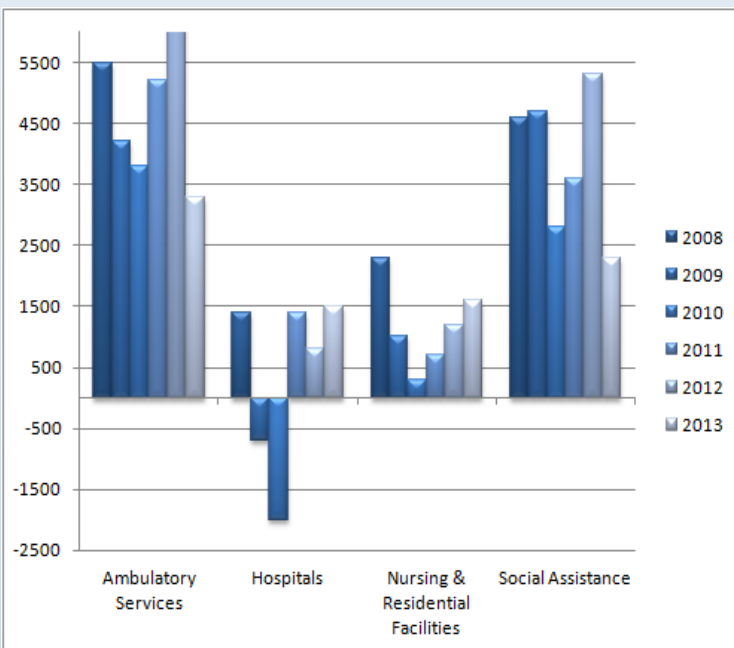


Figure 4: Annual & YTD Change in HC&SA Subsector Employment (Not Seasonally Adjusted, Dec. to Dec.)

In 2013, the Ambulatory Services subsector was the most significant driver of employment growth in Virginia's HC&SA sector, accounting for 3,300 of the 8,700 HC&SA jobs that were created in the state. Although Ambulatory Services produced fewer jobs in 2013 than in each of the past five years, this subsector has still been responsible for the more employment gains than any other subsector for four consecutive years.

Like Ambulatory Services, the Social Assistance subsector produced fewer HC&SA jobs in 2013 than at any time between 2008 and 2012. Regardless, the Social Assistance subsector still managed to produce 2,300 HC&SA jobs during the year.

Meanwhile, relative to past years, Hospitals and Nursing & Residential Care Facilities both had a strong 2013 in terms of HC&SA employment growth. The Hospitals subsector had an especially good year, contributing more to HC&SA employment gains than at any time in the past five years.

Distribution of Growth by Subsector

Not Seasonally Adjusted	Employment, in Thousands				Growth Rate, Annualized		
	Dec. 2012	Sept. 2013	Nov. 2013	Dec. 2013	12 Month	3 Month	1 Month
Virginia							
Health Care & Social Assistance	403.0	407.8	409.7	411.7	2.2%	3.9%	6.0%
<i>Ambulatory Health Care Services</i>	158.6	161.4	161.9	161.9	2.1%	1.2%	0.0%
<i>Hospitals</i>	102.1	102.7	102.7	103.6	1.5%	3.6%	11.0%
<i>Nursing & Residential Care Facilities</i>	71.0	71.2	72.2	72.6	2.3%	8.1%	6.9%
<i>Social Assistance</i>	71.3	72.5	72.9	73.6	3.2%	6.2%	12.2%
Virginia Beach, Norfolk, Newport News							
Health Care & Social Assistance	85.6	87.9	88.4	89.2	4.2%	6.0%	11.4%
<i>Hospitals</i>	21.0	21.5	21.6	21.7	3.3%	3.8%	5.7%
Northern Virginia							
Health Care & Social Assistance	112.0	109.3	109.8	110.5	-1.3%	4.5%	7.9%
<i>Ambulatory Health Care Services</i>	51.6	50.1	50.4	50.8	-1.6%	5.7%	10.0%
<i>Hospitals</i>	22.8	22.4	22.2	22.1	-3.1%	-5.3%	-5.3%

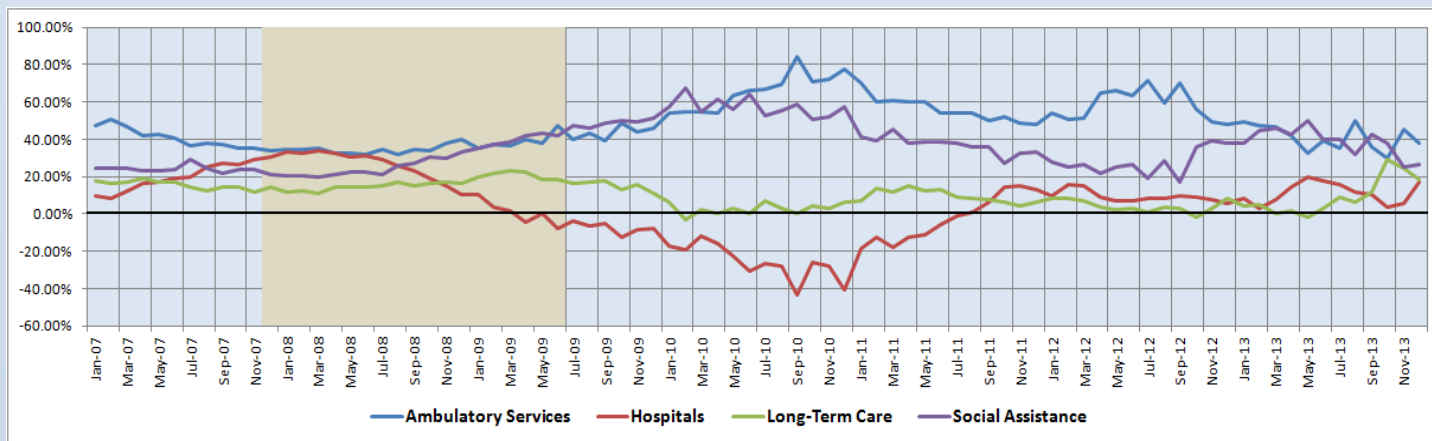
Preliminary estimates are italicized

With an increase of 2,000 jobs in December, Virginia's HC&SA sector produced a strong one-month annualized growth rate of 6.0%. This strength was driven by employment growth in the Social Assistance and Hospitals subsectors, both of which had one-month annualized growth rates in the double digits. Regionally, Hampton Roads and Northern Virginia were both significant contributors to Virginia's HC&SA employment growth in December. This growth was particularly strong in Northern Virginia's Ambulatory Health Care Services subsector, which grew at a one-month annualized growth rate of 10.0%.

Share of 12-Month Growth by Subsector

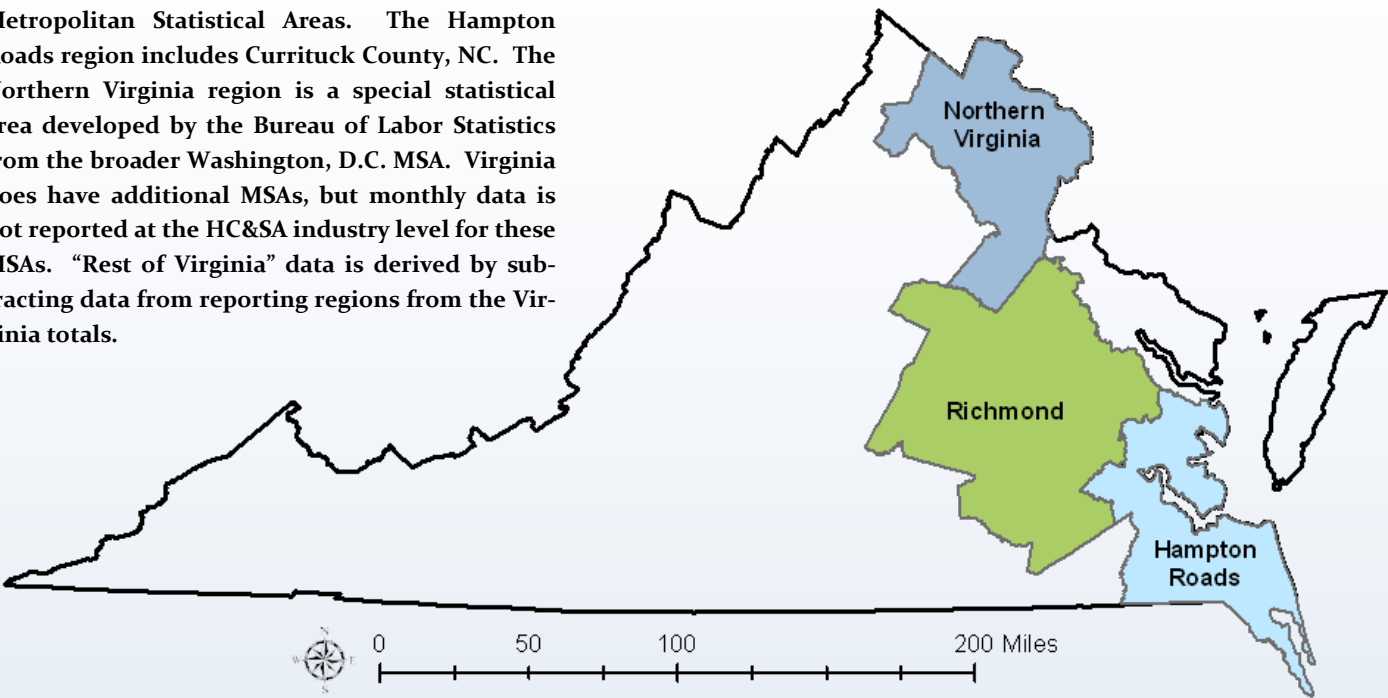
After reaching an eight-month low of 3.33% in October, the Hospitals subsector has seen its 12-month HC&SA employment growth share increase to 17.24% in December. Although Hospitals still have the lowest growth share of all four HC&SA subsectors, it has rapidly closed the gap in the past two months. Ambulatory Health Care Services still has the largest 12-month employment growth share at 37.93%, but this is down from 45.05% in November. Meanwhile, after reaching a year-long low of 25.27% in November, the Social Assistance subsector saw its 12-month employment growth share increase slightly in December to 26.44%, but it still remains well below the levels seen earlier in the year.

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).