



Virginia Healthcare Workforce Briefs

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

Series 2, Issue 17

May 2013

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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 2,000 jobs in April on a non-seasonally adjusted basis. This represents a one-month annualized growth rate of 6.2%, which is nearly double the 12-month growth rate of 3.4%.
- ◆ March's preliminary estimate for HC&SA employment was revised downward by 300 jobs. This turned what was originally estimated to be a net gain of 200 HC&SA jobs into a loss of 100 jobs in March.
- ◆ Northern Virginia added 1,400 HC&SA jobs during the month, thereby accounting for 70% of all gains in the sector. Meanwhile, Richmond added 600 HC&SA jobs, while Hampton Roads contributed 100 additional jobs. Only the Rest of Virginia failed to participate in this growth; instead, the region lost 100 HC&SA jobs in April.
- ◆ Ambulatory Health Care Services was responsible for fully 75% of all employment growth in the HC&SA sector in April, although Hospitals also saw strong growth of 900 jobs added. However, the Social Assistance subsector lost 400 jobs.

Data in Brief

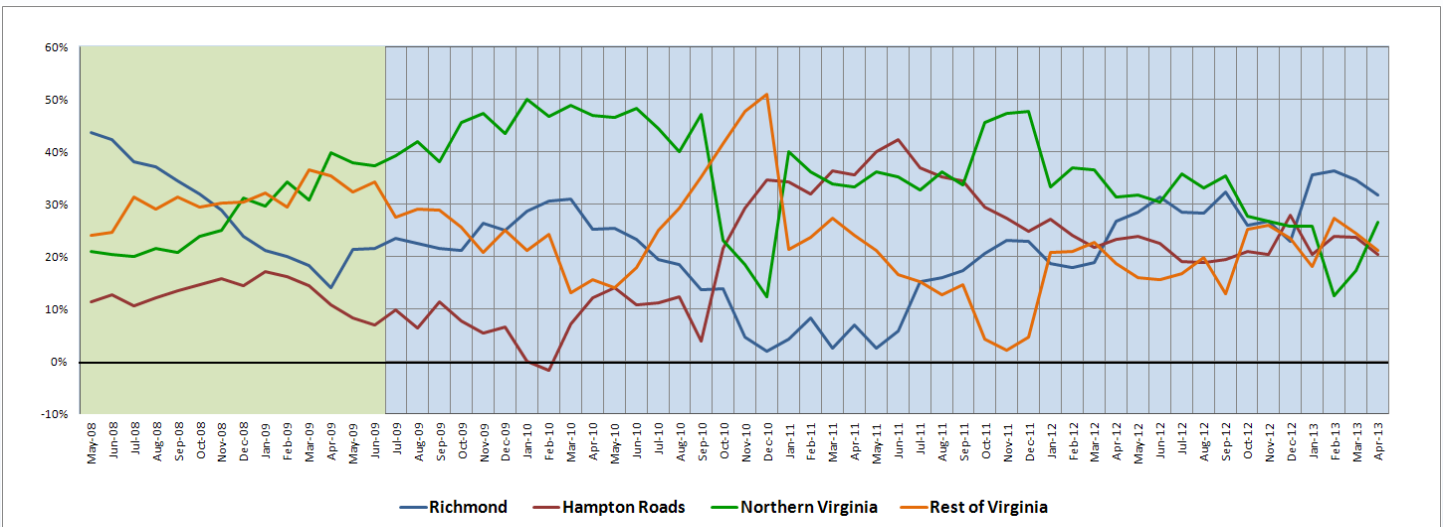
Not Seasonally Adjusted*	Employment, in Thousands				Growth Rate, Annualized		
	Apr. 2012	Jan. 2013	Mar. 2013	Apr. 2013	12 Month	3 Month	1 Month
Virginia							
Total Nonfarm	3,722.7	3,688.7	3,729.8	3,762.8	1.1%	8.3%	11.1%
Health Care & Social Assistance	389.6	398.8	400.8	402.8	3.4%	4.1%	6.2%
Virginia Beach, Norfolk, Newport News							
Total Nonfarm	741.5	737.9	747.5	755.3	1.9%	9.8%	13.3%
Health Care & Social Assistance	82.2	83.9	84.8	84.9	3.3%	4.9%	1.4%
Northern Virginia							
Total Nonfarm	1,346.6	1,350.4	1,358.9	1,369.0	1.7%	5.6%	9.3%
Health Care & Social Assistance	108.8	111.3	110.9	112.3	3.2%	3.6%	16.2%
Richmond							
Total Nonfarm	622.2	619.5	624.5	630.7	1.4%	7.4%	12.6%
Health Care & Social Assistance	76.3	79.9	79.9	80.5	5.5%	3.0%	9.4%
Rest of Virginia							
Total Nonfarm	1,012.4	980.9	998.9	1,007.8	-0.5%	11.4%	11.2%
Health Care & Social Assistance	122.3	123.7	125.2	125.1	2.3%	4.6%	-1.0%

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.

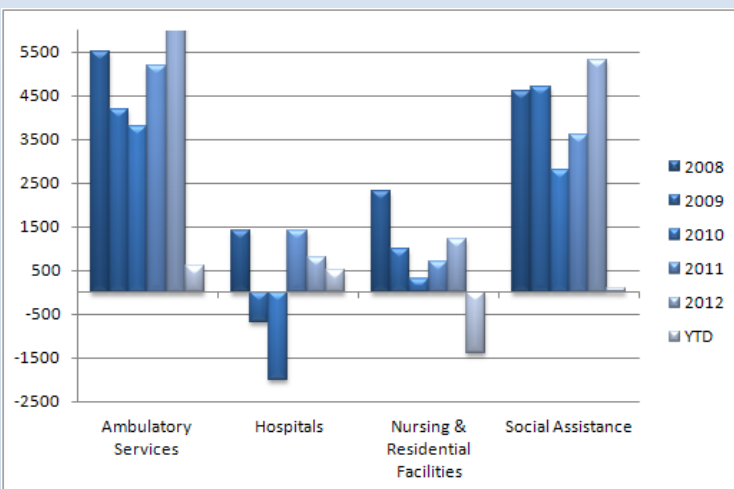


In addition to its year-over-year HC&SA employment growth rate, Northern Virginia's share of 12-month employment growth has increased dramatically since February. In February, Northern Virginia's share reached a two-year low of 12.6% of total employment growth over the previous 12 months, but this share has more than doubled to 26.5% in April. With this sudden increases, Northern Virginia now sports the second-largest share of 12-month employment growth among all regions in Virginia. This share increase has come at the expense of every other region in the state, each of which saw their 12-month employment share fall in April by approximately 3%. In addition, the two regions with the largest employment share in February, Richmond and the Rest of Virginia, have seen their shares fall by approximately 6% since then.

Subsector Employment Growth

Although Virginia's HC&SA sector produced a healthy gain of 2,000 jobs in April, all of those gains were concentrated in just two subsectors: Ambulatory Health Care Services and Hospitals. Ambulatory Health Care Services was a significant contributor to April's employment growth by adding 1,500 jobs, while Hospitals also had a strong month by adding an additional 900 jobs. However, the other two subsectors, Nursing & Residential Care Facilities and Social Assistance, saw employment growth stagnate. This was especially true of the Social Assistance subsector, which actually lost 400 jobs in what was a strong month for the overall HC&SA sector.

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



Regardless, April's positive employment gains helped to improve the year-to-date results of the various HC&SA subsectors. In Q1 2013, three of Virginia's four HC&SA subsectors lost jobs; only the Social Assistance subsector saw positive employment gains. Thanks to the strong April employment gains in Ambulatory Health Care Services and Hospitals, however, three HC&SA subsectors are now experiencing positive year-to-date employment growth. Only Nursing & Residential Care Facilities, which saw no change in its April employment numbers, bucks this trends; so far in 2013, this subsector has lost 1,400 jobs, more than all the gains in the other subsectors combined.

Distribution of Growth by Subsector

Not Seasonally Adjusted	Employment, in Thousands				Growth Rate, Annualized		
	Apr. 2012	Jan. 2013	Mar. 2013	Apr. 2013	12 Month	3 Month	1 Month
Virginia							
Health Care & Social Assistance	389.6	398.8	400.8	402.8	3.4%	4.1%	6.2%
<i>Ambulatory Health Care Services</i>	153.6	157.6	157.7	159.2	3.6%	4.1%	12.0%
<i>Hospitals</i>	100.1	101.2	101.7	102.6	2.5%	5.6%	11.2%
<i>Nursing & Residential Care Facilities</i>	69.6	69.9	69.6	69.6	0.0%	-1.7%	0.0%
<i>Social Assistance</i>	66.3	70.1	71.8	71.4	7.7%	7.6%	-6.5%
Virginia Beach, Norfolk, Newport News							
Health Care & Social Assistance	82.2	83.9	84.8	84.9	3.3%	4.9%	1.4%
<i>Hospitals</i>	20.2	20.6	20.7	21.1	4.5%	10.1%	25.8%
Northern Virginia							
Health Care & Social Assistance	108.8	111.3	110.9	112.3	3.2%	3.6%	16.2%
<i>Ambulatory Health Care Services</i>	49.7	51.5	50.2	51.2	3.0%	-2.3%	26.7%
<i>Hospitals</i>	22.8	22.7	23.3	23.7	3.9%	18.8%	22.7%

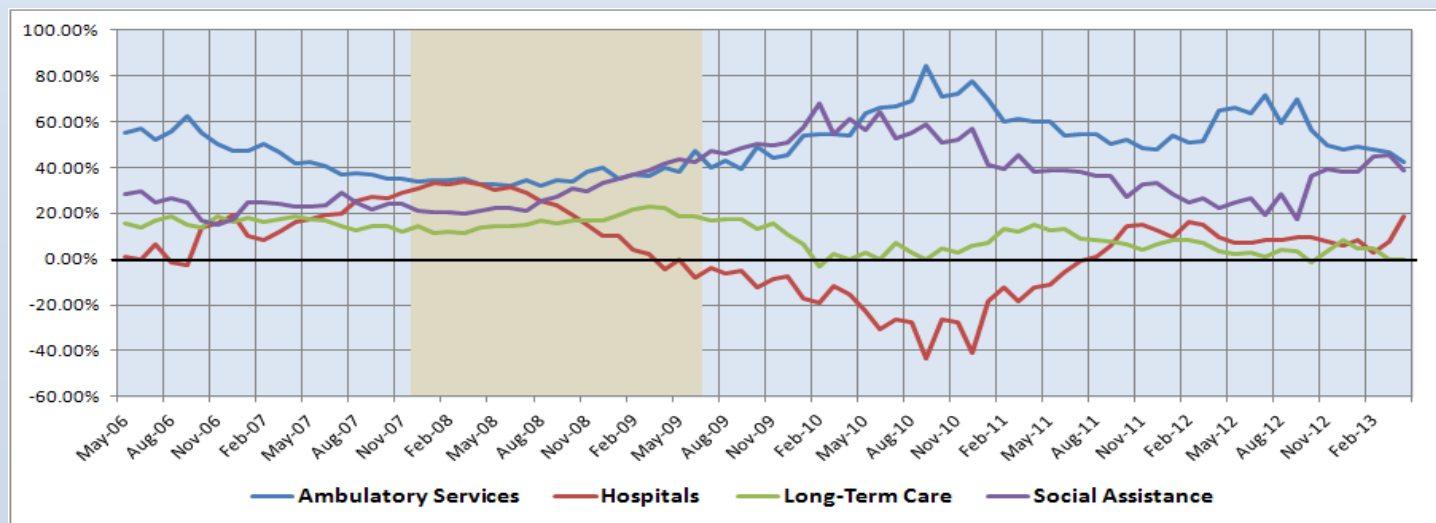
Preliminary estimates are italicized

Both the Ambulatory Health Care Services and Hospitals subsectors enjoyed one-month annualized employment growth rates of more than 10% in April, and these numbers were even more impressive within the two regions, Hampton Roads and Northern Virginia, which breakdown their employment numbers by subsector. The Hospitals subsector grew by more than 20% in both Hampton Roads and Northern Virginia, while the Ambulatory Health Care Services subsector grew by more than 25% in Northern Virginia. Meanwhile, the Social Assistance subsector, which was the weakest performer in April, continues to be the fastest-growing subsector over the past 12 months, with a year-over-year growth rate of 7.7%

Share of 12-Month Growth by Subsector

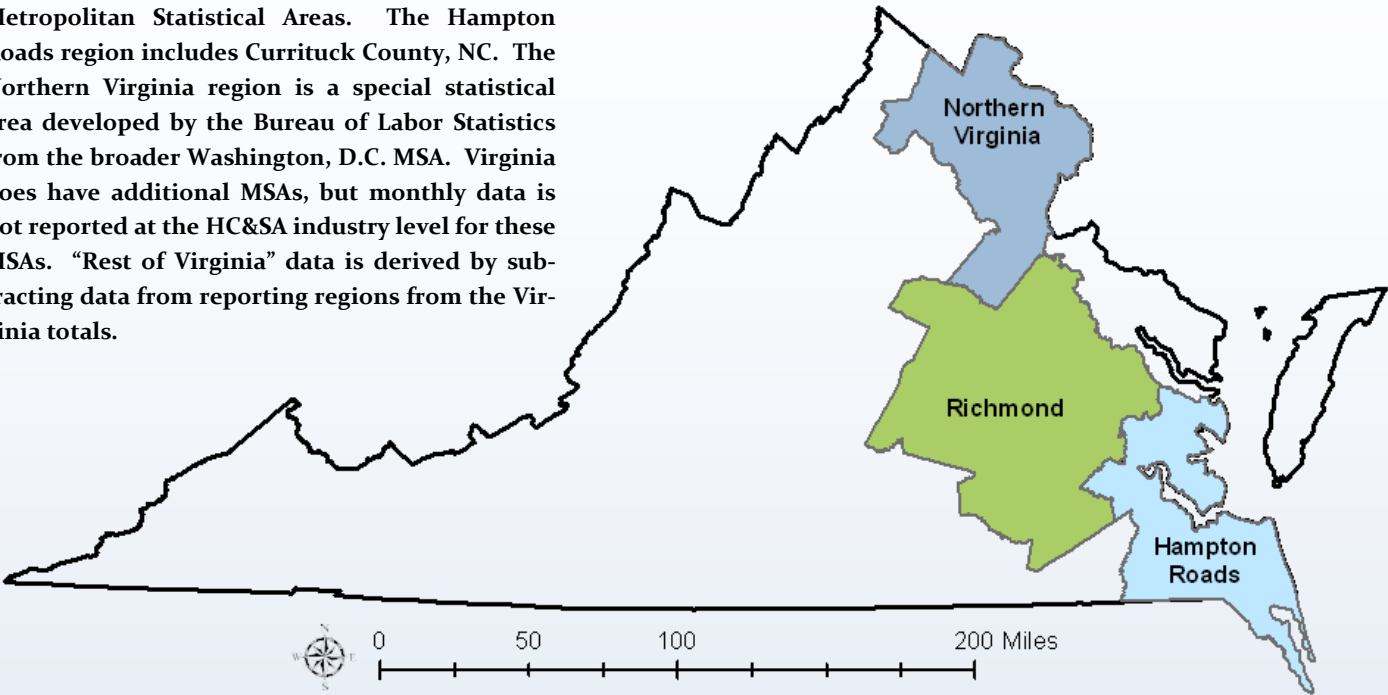
In March, most of the 12-month growth in HC&SA employment was concentrated in the Ambulatory Services and Social Assistance subsectors. Although this remains the case in April — combined, these two subsectors are responsible for 80% of growth — the Hospitals subsector saw a dramatic rise in its respective share from 7.9% to 19.0%. This represents the highest share attributable to the Hospitals subsector since October 2008. Meanwhile, the share of 12-month growth attributable to the Long-Term Care subsector remained at 0% for the second consecutive month.

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).