



Virginia Healthcare Workforce Briefs

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

Series 2, Issue 31

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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.
- ◆ Northern Virginia was the only region of the state where HC&SA jobs were created in July. However, the 400 jobs that were added in Northern Virginia were negated by the loss of 500 HC&SA jobs in the Rest of Virginia and the loss of 200 HC&SA jobs in Richmond. Hampton Roads experienced no change in HC&SA employment in July.
- ◆ After adding 1,900 jobs in June, Ambulatory Health Care Services had another strong month in July with 1,800 jobs created. However, Social Assistance erased most of those gains after losing 1,500 jobs during the month. Meanwhile, Hospitals and Nursing & Residential Care Facilities experience a combined loss of 600 jobs.
- ◆ Richmond remains solely responsible for all year-to-date HC&SA job growth, adding 3,500 jobs to Virginia's economy so far in 2014. Meanwhile, Ambulatory Health Care Services is now the only HC&SA subsector to experience job growth this year. Over the past seven months, this HC&SA subsector has created 4,000 new jobs.

Data in Brief

Not Seasonally Adjusted*	Employment, in Thousands				Growth Rate, Annualized		
	July 2013	Apr. 2014	June 2014	July 2014	12 Month	3 Month	1 Month
Virginia							
Total Nonfarm	3,765.3	3,770.4	3,809.1	3,794.2	0.8%	2.5%	-4.6%
Health Care & Social Assistance	408.5	413.0	414.9	414.6	1.5%	1.6%	-0.9%
Virginia Beach, Norfolk, Newport News							
Total Nonfarm	760.4	749.2	762.9	764.3	0.5%	8.3%	2.2%
Health Care & Social Assistance	87.0	89.1	88.9	88.9	2.2%	-0.9%	0.0%
Northern Virginia							
Total Nonfarm	1,370.1	1,369.0	1,389.4	1,384.0	1.0%	4.5%	-4.6%
Health Care & Social Assistance	113.8	113.7	113.7	114.1	0.3%	1.4%	4.3%
Richmond							
Total Nonfarm	634.0	643.1	650.7	647.2	2.1%	2.6%	-6.3%
Health Care & Social Assistance	80.4	83.7	84.3	84.1	4.6%	1.9%	-2.8%
Rest of Virginia							
Total Nonfarm	1,000.8	1,009.1	1,006.1	998.7	-0.2%	-4.1%	-8.5%
Health Care & Social Assistance	127.3	126.5	128.0	127.5	0.2%	3.2%	-4.6%

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

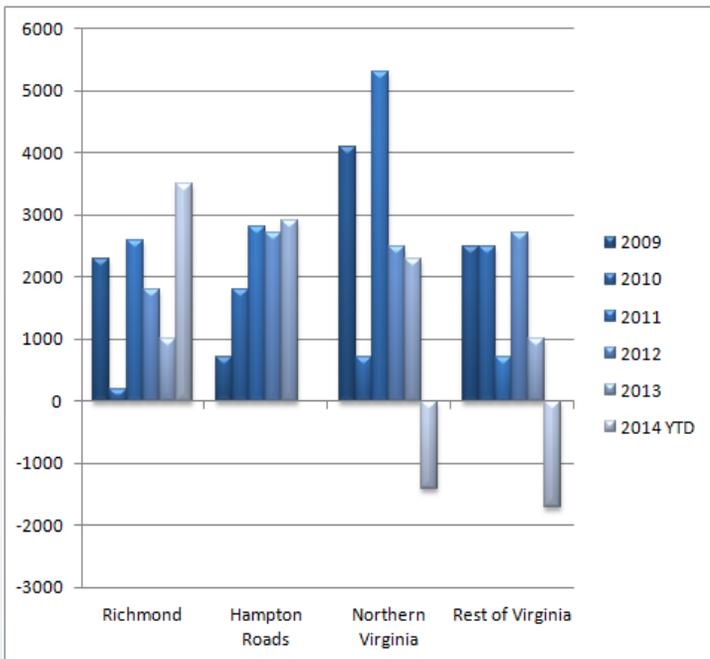


Figure 1: Annual Change in HC&SA Employment (Not Seasonally Adjusted, Change from Dec to Dec).

According to preliminary data released on August 18, 2014 by the U.S. Department of Labor, Bureau of Labor Statistics, Virginia's HC&SA sector lost 300 jobs in July. Meanwhile, June's preliminary estimate for HC&SA employment was revised upward by 400 jobs. After this revision, 900 jobs were created in Virginia's HC&SA sector in June.

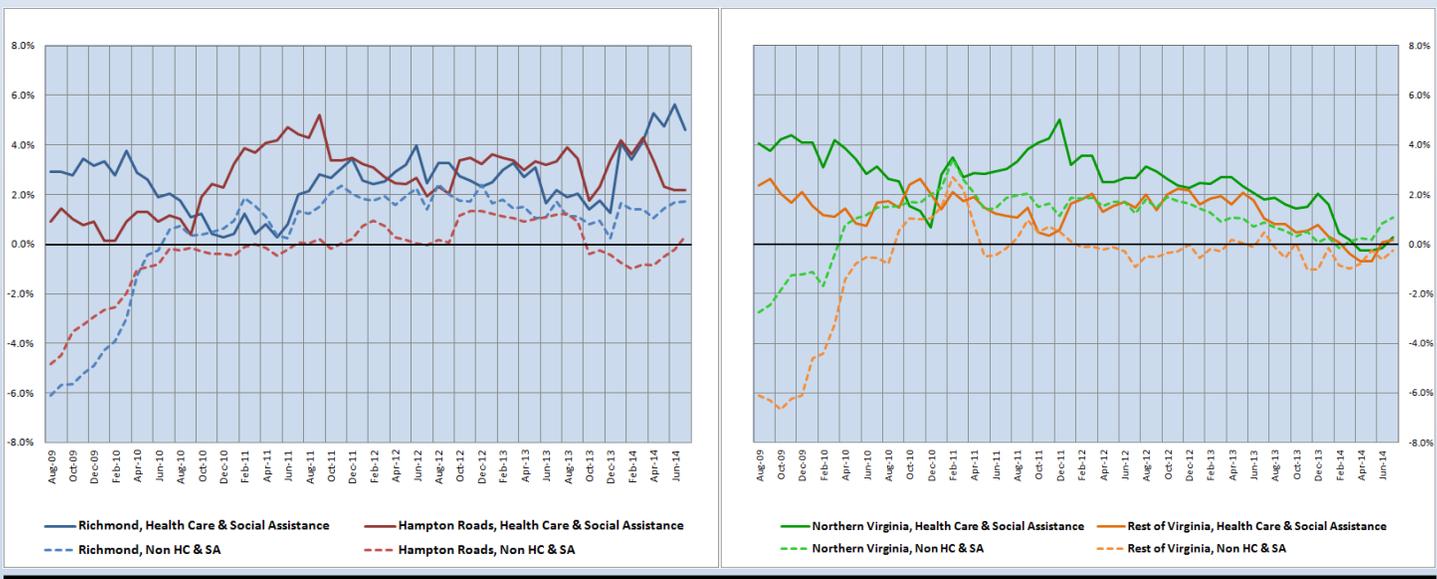
With 400 jobs added in July, Northern Virginia was the only region in Virginia where HC&SA employment increased during the month. Despite this monthly increase, however, Northern Virginia has still lost 1,400 HC&SA jobs so far this year. Only the Rest of Virginia has lost more year-to-date HC&SA jobs.

Meanwhile, Richmond lost 200 HC&SA jobs in July. This represents the first monthly employment loss in Richmond's HC&SA sector in 2014. Regardless, Richmond has still produced 3,500 HC&SA jobs this year and remains the only region in the state with year-to-date HC&SA job gains. The next strongest region is Hampton Roads, which has seen no net change in HC&SA job creation so far this year.

Year-Over-Year Regional Employment Growth

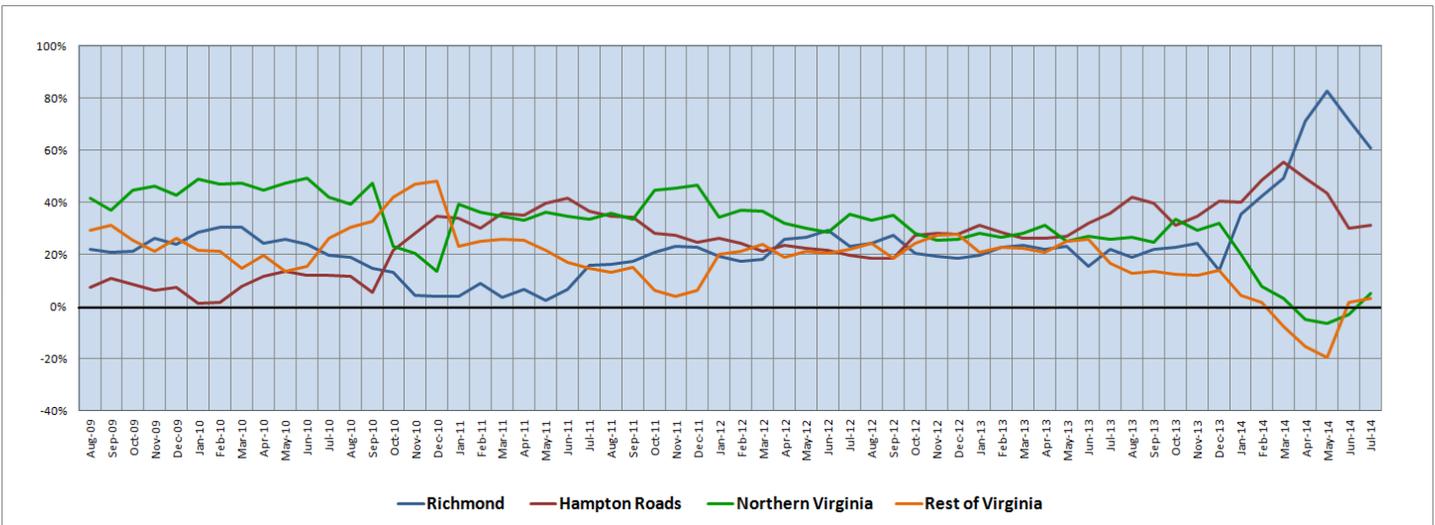
Thanks to the addition of 400 HC&SA jobs, Northern Virginia's year-over-year HC&SA employment growth rate turned positive for the first time in four months, increasing from -0.2% in June to 0.3% in July. Regardless, Northern Virginia remains the only region in Virginia where its year-over-year non-HC&SA employment growth rate exceeds the corresponding growth rate in the HC&SA sector. Meanwhile, the year-over-year employment growth rate in the Rest of Virginia, which rebounded into positive territory in June, furthered its gains in July, although growth still remains rather anemic at 0.2%. Richmond continues to sports the fastest year-over-year HC&SA employment growth rate at 4.6%.

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.



For the first time since February, all four regions of Virginia have positive 12-month HC&SA regional growth shares. In addition, only Richmond experienced a decline in its regional growth share, but the region is still responsible for 60.7% of all HC&SA employment growth over the previous 12-months. While Richmond remains the main driver for HC&SA employment growth, both Northern Virginia and the Rest of Virginia have seen significant rebounds in their respective 12-month employment growth shares in recent months. Since May, Northern Virginia has seen its employment growth share increase from -6.5% to 4.9%, while the Rest of Virginia has seen its growth share increase from -19.6% to 3.3%. Meanwhile, Hampton Roads is currently responsible for approximately one-third of all HC&SA job growth over the past 12 months.

Subsector Employment Growth

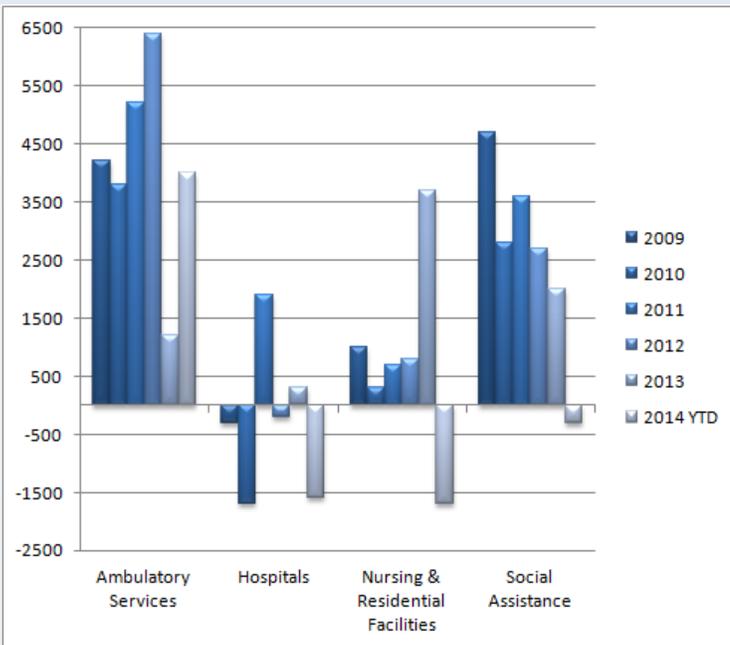


Figure 4: Annual & YTD Change in HC&SA Subsector Employment (Not Seasonally Adjusted, Dec. to Dec.)

Ambulatory Health Care Services followed up its strongest month of employment gains in more than a decade in June by nearly duplicating the feat in July with the addition 1,800 jobs to the state’s economy. The 3,700 jobs that have been added in this subsector over the past two months represents over 90% of its year-to-date job growth.

While Ambulatory Health Care Services has seen a surge in employment in 2014, the other HC&SA subsectors in Virginia have struggled to add jobs. The Social Assistance subsector has had a particularly difficult time over the past two months. Between January and May, Social Assistance created 2,200 jobs, but all of these jobs have been lost over the past two months. The losses were especially deep in July as employment in the sector fell by 1,500.

Hospitals and Nursing & Residential Care Facilities also lost 400 and 200 jobs, respectively, in July. Their year-to-date employment results have been no better: These two HC&SA subsectors have combined to lose 3,300 jobs so far in 2014.

Distribution of Growth by Subsector

Not Seasonally Adjusted	Employment, in Thousands				Growth Rate, Annualized		
	July 2013	Apr. 2014	June 2014	July 2014	12 Month	3 Month	1 Month
Virginia							
Health Care & Social Assistance	408.5	413.0	414.9	414.6	1.5%	1.6%	-0.9%
<i>Ambulatory Health Care Services</i>	159.3	160.3	161.7	163.5	2.6%	8.2%	14.2%
<i>Hospitals</i>	109.3	108.7	108.5	108.1	-1.1%	-2.2%	-4.3%
<i>Nursing & Residential Care Facilities</i>	71.4	73.0	72.8	72.6	1.7%	-2.2%	-3.2%
<i>Social Assistance</i>	68.5	71.0	71.9	70.4	2.8%	-3.3%	-22.4%
Virginia Beach, Norfolk, Newport News							
Health Care & Social Assistance	87.0	89.1	88.9	88.9	2.2%	-0.9%	0.0%
<i>Hospitals</i>	22.9	22.8	22.6	22.5	-1.7%	-5.2%	-5.2%
Northern Virginia							
Health Care & Social Assistance	113.8	113.7	113.7	114.1	0.3%	1.4%	4.3%
<i>Ambulatory Health Care Services</i>	52.3	52.8	52.7	53.3	1.9%	3.8%	14.6%
<i>Hospitals</i>	24.8	24.1	23.7	23.4	-5.6%	-11.1%	-14.2%

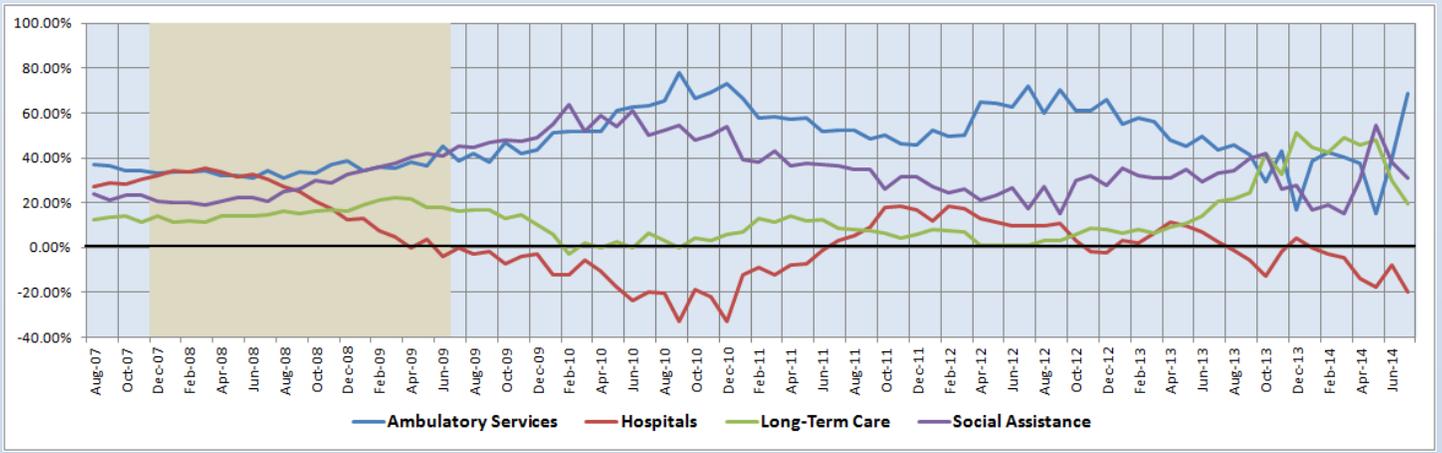
Preliminary estimates are italicized

With the dramatic growth of employment in the Ambulatory Health Care Services subsector over the past two months, its year-over-year employment growth rate has consequently accelerated. In May, the year-over-year employment growth rate of the Ambulatory Health Care Services subsector reached a decade-long low of 0.4%, but it has rebounded to 2.6% in July. However, the Social Assistance subsector still sports a faster 12-month employment growth rate of 2.8%, although this is down from 3.5% in June. At the same time, the year-over-year employment growth rate of the Hospitals subsector has now dropped to -1.1%, its lowest value in three-and-a-half years.

Share of 12-Month Growth by Subsector

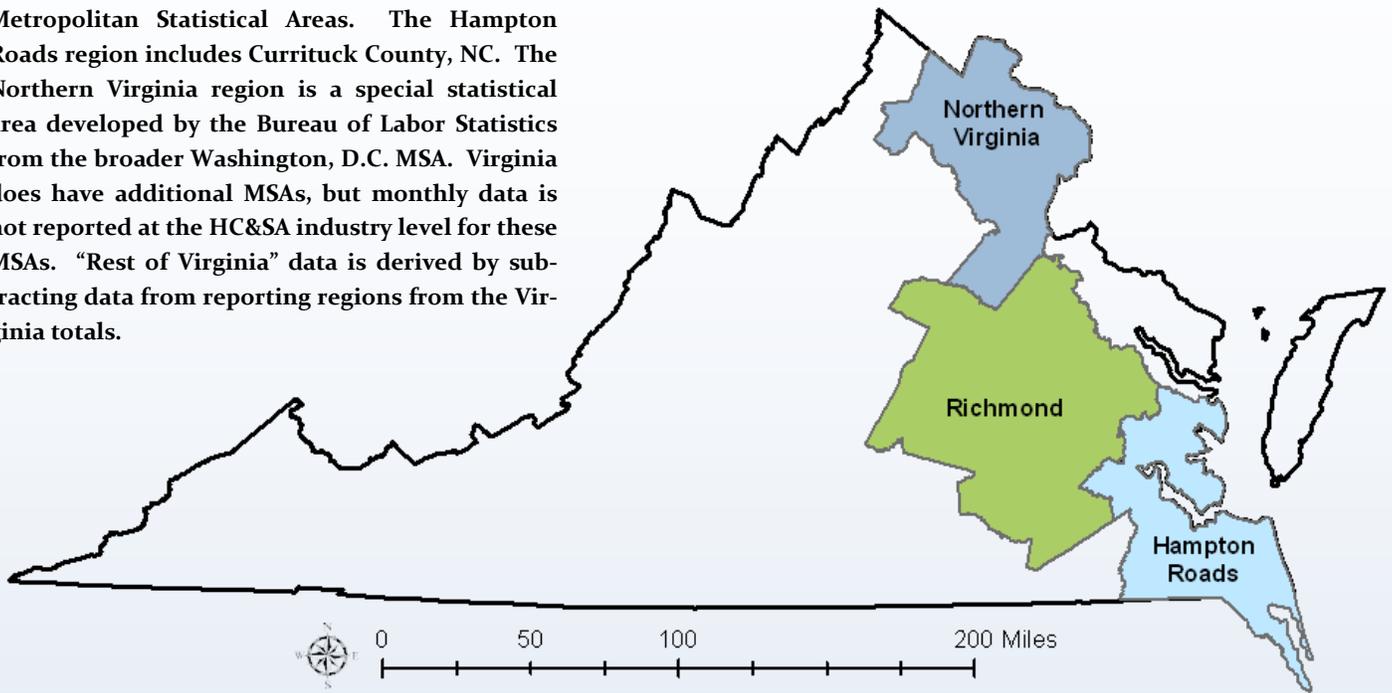
Since May, the Ambulatory Health Care Services subsector has seen its 12-month HC&SA employment growth share more than quadrupled to 68.9%. This growth has come at the expense of Virginia’s three other HC&SA subsectors. For instance, the Hospitals subsector experienced a decline in its 12-month employment growth share from -17.4% in May to -19.7% in July, its lowest value since December 2010. The Social Assistance subsector had its 12-month employment growth share decline from 54.4% in May to 31.2% in July, while the Nursing & Residential Care Facilities subsector saw its corresponding growth share fall from 47.8% to a one-year low of 19.7%.

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	
<i>Northern VA, (Non-standard CES Area 94783)</i>		<i>Richmond, VA (MSA 40060)</i>		<i>Virginia Beach-Norfolk-Newport News, VA-NC (MSA 47260)</i>	
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		<i>Currituck, NC</i>	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).

The Department of Health Professions Healthcare Workforce Data Center works to improve the data collection and measurement of Virginia's healthcare workforce through regular assessment of workforce supply and demand issues among the 80 professions and 350,000 practitioners licensed in Virginia by DHP.

The HWDC collects data on Virginia's licensed health professionals through surveys completed during the online license renewal and application process. Survey results and data may be accessed on our website: www.dhp.virginia.gov/hwdc/.

The HWDC also provides a series of Virginia Healthcare Workforce Briefs based data collected by the US Department of Labor's Bureau of Labor Statistics and the US Department of Commerce' Bureau of Economic Analysis.

Virginia Healthcare Workforce Briefs:

Series 1: State & National Employment (Monthly)

Series 2: Virginia Regional Employment (Monthly)

Series 3: Income & Compensation (Quarterly)