



Virginia Healthcare Workforce Briefs

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

Series 2, Issue 34

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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.
- ◆ After four consecutive months of employment declines, Northern Virginia's Health Care & Social Assistance (HC&SA) sector experienced its strongest one-month employment gain in more than a decade with the creation of 3,000 jobs. This represents a one-month annualized employment growth rate of 37.4%.
- ◆ Richmond's HC&SA sector enjoyed another strong month of employment gains in October, creating 700 jobs during the month. Hampton Roads also experienced growth in its HC&SA sector in October, although the gains amounted to a relatively modest 200 jobs.
- ◆ Ambulatory Health Care Services recouped all of its employment losses from September with a gain of 2,700 jobs in October. Social Assistance also experienced a strong month with the creation of 1,000 jobs. Meanwhile, Hospitals added 300 jobs during the month, while Nursing & Residential Care Facilities lost 200 jobs.

Data in Brief

Not Seasonally Adjusted*	Employment, in Thousands				Growth Rate, Annualized		
	Oct. 2013	July 2014	Sept. 2014	Oct. 2014	12 Month	3 Month	1 Month
Virginia							
Total Nonfarm	3,784.1	3,794.4	3,781.8	3,799.6	0.4%	0.5%	5.8%
Health Care & Social Assistance	409.9	414.5	414.8	418.6	2.1%	4.0%	11.6%
Virginia Beach, Norfolk, Newport News							
Total Nonfarm	750.7	763.8	759.1	756.4	0.8%	-3.8%	-4.2%
Health Care & Social Assistance	87.1	88.4	88.3	88.5	1.6%	0.5%	2.8%
Northern Virginia							
Total Nonfarm	1,374.7	1,383.5	1,372.3	1,378.6	0.3%	-1.4%	5.7%
Health Care & Social Assistance	114.3	113.2	111.9	114.9	0.5%	6.1%	37.4%
Richmond							
Total Nonfarm	637.2	646.8	644.5	648.1	1.7%	0.8%	6.9%
Health Care & Social Assistance	80.3	84.1	86.3	87.0	8.3%	14.5%	10.2%
Rest of Virginia							
Total Nonfarm	1,021.5	1,000.3	1,005.9	1,016.5	-0.5%	6.6%	13.4%
Health Care & Social Assistance	128.2	128.8	128.3	128.2	0.0%	-1.9%	-0.9%

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 HC&SA Employment Growth, Level

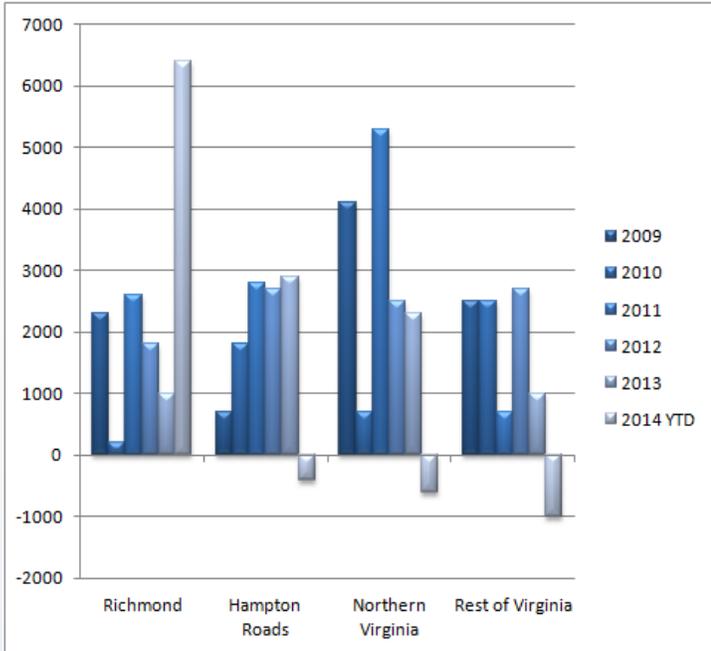


Figure 1: Annual Change in HC&SA Employment (Not Seasonally Adjusted, Change from Dec to Dec).

According to preliminary data released on November 21, 2014 by the U.S. Department of Labor, Bureau of Labor Statistics, Virginia’s HC&SA sector created 3,800 jobs in October. Meanwhile, September’s preliminary estimate for HC&SA employment in Virginia was revised downward by 600 jobs. After this revision, Virginia’s HC&SA sector lost 1,100 jobs in September.

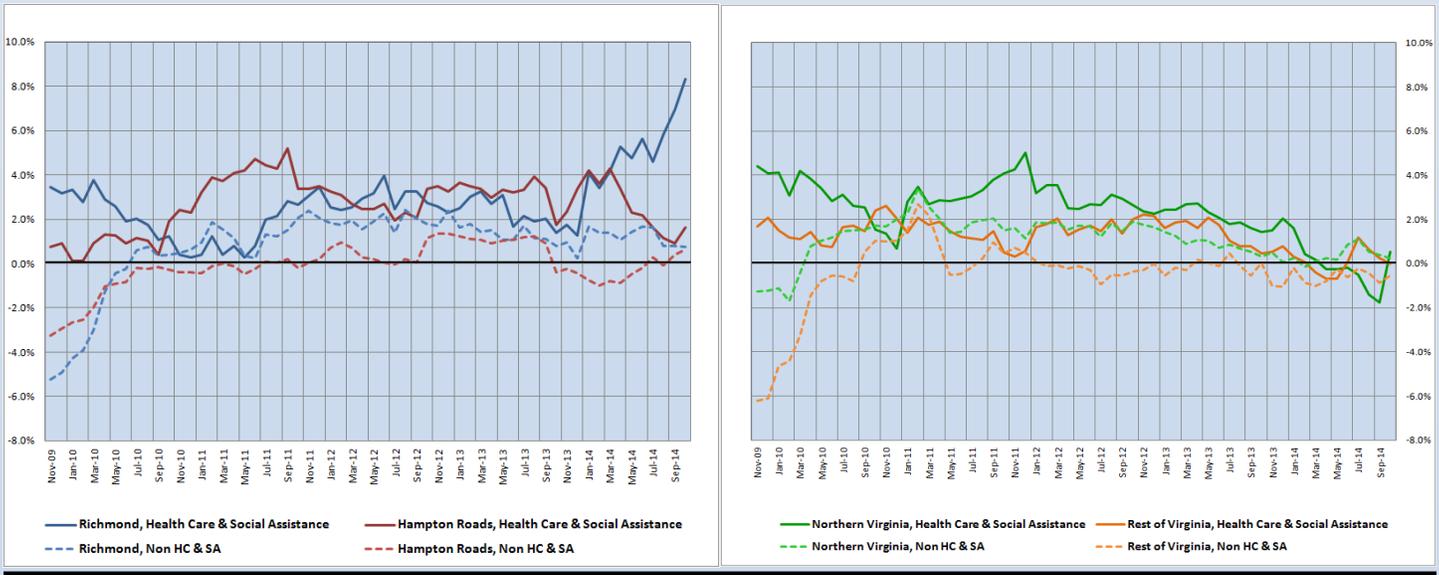
October’s surprising revelation was the sudden strength of Northern Virginia’s HC&SA sector, which had been languishing through most of 2014. In fact, Northern Virginia’s HC&SA sector had lost jobs in seven of the first nine months of 2014, but most of these losses were wiped away by the creation of 3,000 jobs in October. Regardless, Northern Virginia’s HC&SA sector is still in the red for the moment with respect to year-to-date employment growth.

Richmond’s HC&SA sector also had a strong month with the addition of 700 jobs, pushing it year-to-date gains to 6,400. Hampton Roads added 200 HC&SA jobs in October, while the Rest of Virginia lost 100 HC&SA jobs during the month.

Year-Over-Year Regional Employment Growth

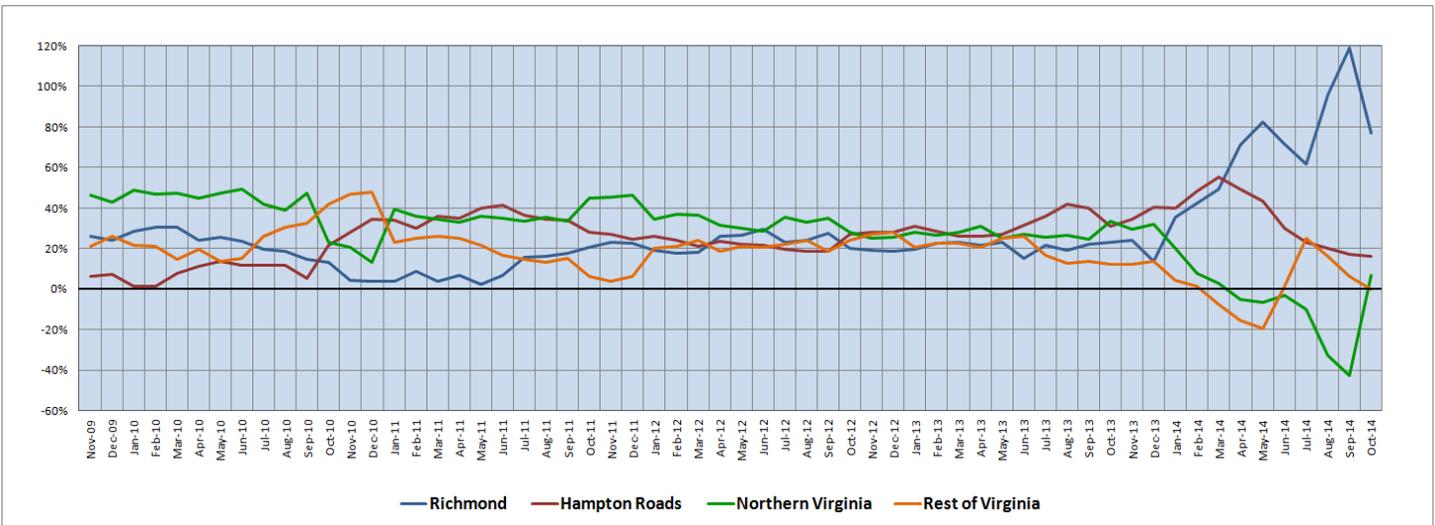
Richmond’s year-over-year HC&SA employment growth rate continued its upward momentum during the month with an increase from 6.9% in September to 8.3% in October. This represents the highest year-over-year growth rate for Richmond’s HC&SA sector since September 2008. No other region in the state comes even close to matching the incredible growth of Richmond’s HC&SA sector. Hampton Roads’ year-over-year HC&SA employment growth rate did reach a three-month high of 1.6% in October, but it is still down by 62% from the beginning of the year. Meanwhile, in a promising development, Northern Virginia’s growth rate reached 0.5% in October, its first sign of positive growth since March.

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.



Although down from its unsustainable high of 119% in September, Richmond’s 12-month regional HC&SA employment growth share still stands at an impressive 77% in October. In addition, Richmond still remains the only region in the state that has seen its 12-month employment growth share increase since the beginning of the year. Regardless, Northern Virginia’s 12-month regional growth share made a dramatic reversal during the month after adding 3,000 jobs to the regional economy in October. After falling to -42.6% in September, Northern Virginia’s 12-month growth share climbed all the way to 6.9% in October, its highest value since February. Despite falling for the seventh consecutive month, Hampton Roads still has the second-largest growth share at 16.1%, while the Rest of Virginia has seen no growth at all in the past year.

Subsector Employment Growth

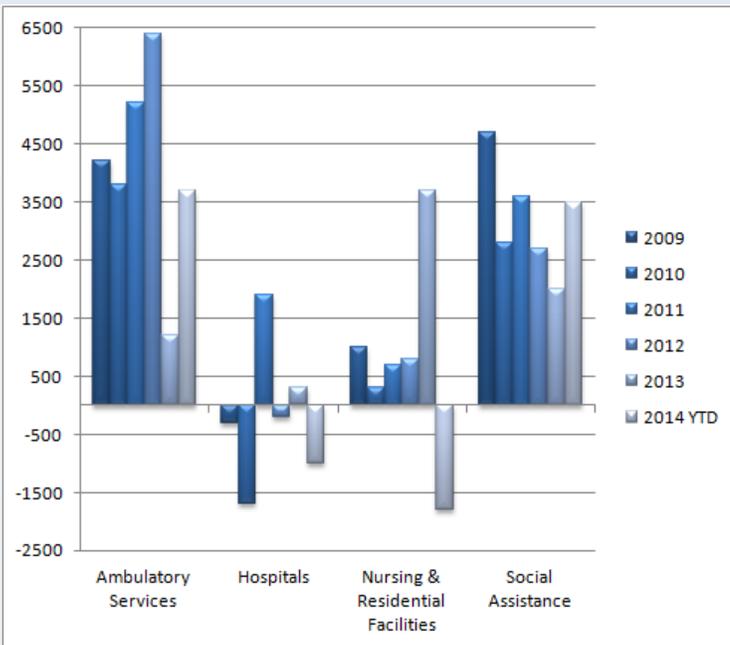


Figure 4: Annual & YTD Change in HC&SA Subsector Employment (Not Seasonally Adjusted, Dec. to Dec.)

After losing 2,700 jobs in September, Ambulatory Health Care Services regain all of those jobs right back in October. The 2,700 jobs created in October represent the largest single month of employment gains for the Ambulatory Health Care Services subsector in more than a decade. Meanwhile, the Social Assistance subsector enjoyed yet another month of strong employment gains in October with the addition of 1,000 jobs. In just the past three months, the Social Assistance subsector has added nearly 5,000 jobs to the state’s economy. Hospitals also contributed positively to the state’s employment growth in October with the addition of 300 jobs, while Nursing & Residential Care Facilities lost 200 jobs during the month.

Ambulatory Health Care Services and Social Assistance have both experienced strong year-to-date employment growth. Ambulatory Health Care Services has added 3,700 job so far in 2014, while Social Assistance is close behind with 3,500 jobs added. However, Hospitals and Nursing & Residential Care Facilities have lost a combined 2,800 jobs.

Distribution of Growth by Subsector

Not Seasonally Adjusted	Employment, in Thousands				Growth Rate, Annualized		
	Oct. 2013	July 2014	Sept. 2014	Oct. 2014	12 Month	3 Month	1 Month
Virginia							
Health Care & Social Assistance	409.9	414.5	414.8	418.6	2.1%	4.0%	11.6%
<i>Ambulatory Health Care Services</i>	158.8	162.9	160.5	163.2	2.8%	0.7%	22.2%
<i>Hospitals</i>	108.9	109.3	108.4	108.7	-0.2%	-2.2%	3.4%
<i>Nursing & Residential Care Facilities</i>	72.1	73.0	72.7	72.5	0.6%	-2.7%	-3.3%
<i>Social Assistance</i>	70.1	69.3	73.2	74.2	5.8%	31.4%	17.7%
Virginia Beach, Norfolk, Newport News							
Health Care & Social Assistance	87.1	88.4	88.3	88.5	1.6%	0.5%	2.8%
<i>Hospitals</i>	23.0	22.6	22.5	22.5	-2.2%	-1.8%	0.0%
Northern Virginia							
Health Care & Social Assistance	114.3	113.2	111.9	114.9	0.5%	6.1%	37.4%
<i>Ambulatory Health Care Services</i>	52.6	53.2	52.0	53.7	2.1%	3.8%	47.1%
<i>Hospitals</i>	24.4	23.6	23.4	23.7	-2.9%	1.7%	16.5%

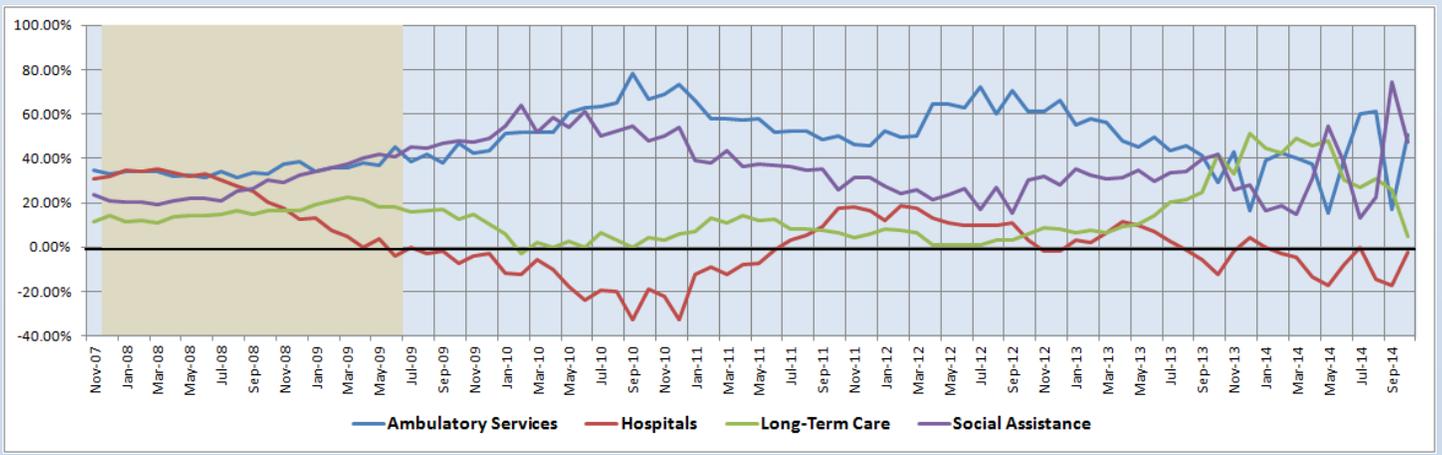
Preliminary estimates are italicized

In October, Virginia's Ambulatory Health Care Services subsector grew at a 22.2% annualized rate. Much of this growth can be attributed to Northern Virginia's Ambulatory Health Care Services subsector, which added 1,700 jobs during the month. This accounts for 57% of all employment growth in Northern Virginia's HC&SA sector and 63% of all employment growth in the state's overall Ambulatory Health Care Services subsector. Social Assistance also had a very strong month in October with a one-month annualized employment growth rate of 17.7%, and its three-month annualized employment growth rate is even more impressive at 31.4%.

Share of 12-Month Growth by Subsector

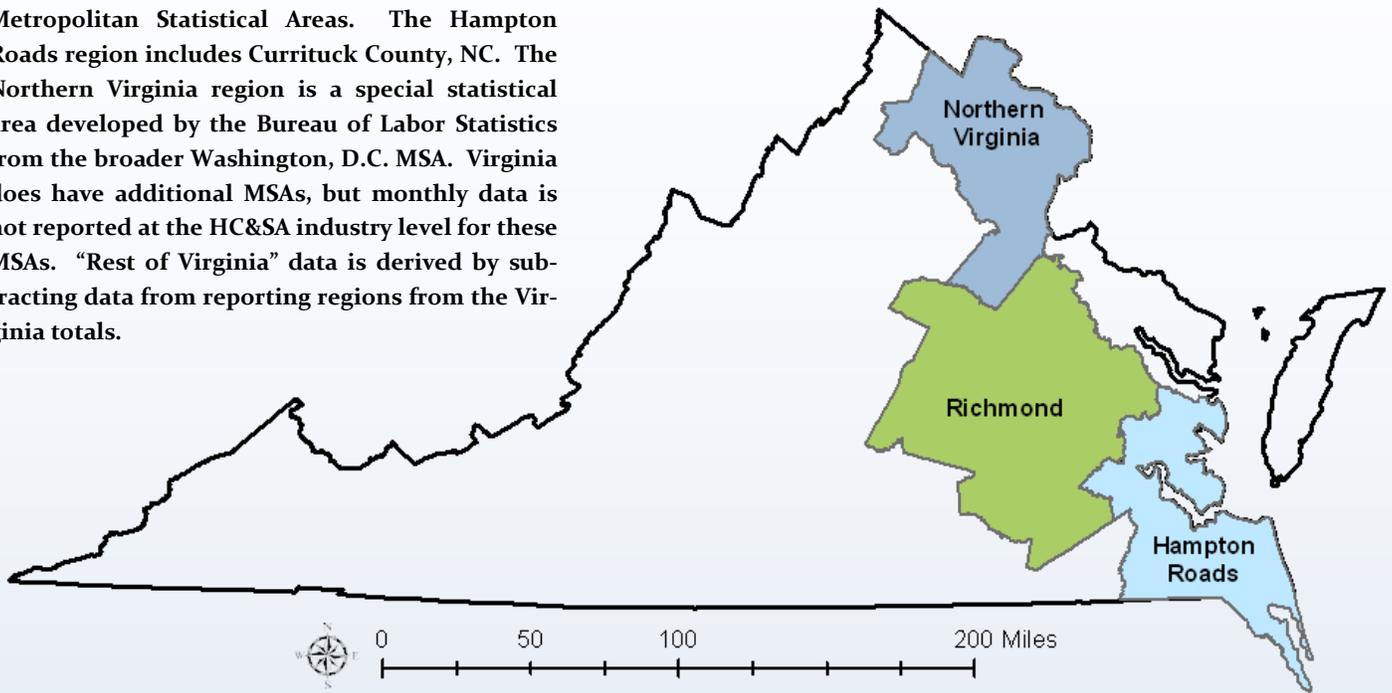
Just one month after its 12-month employment growth share sharply declined from 61.2% to 17.0%, Ambulatory Health Care Services saw its growth share rebound strongly to 50.6% in October. With this increase, Ambulatory Health Care Services once again has the largest 12-month employment growth share of any HC&SA subsector in Virginia. In September, that designation belonged to the Social Assistance subsector, but its 12-month employment growth share fell to 47.1% during the month. Nursing & Residential Care Facilities also saw its growth share decline in October to 4.6%, its lowest value in more than two years, while the growth share of Hospitals remained in negative territory at -2.3% during the 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	
<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		<i>Currituck, NC</i>	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).

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)