



Virginia Healthcare Workforce Briefs

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

Series 2, Issue 33

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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.
- ◆ The employment growth in Richmond's Health Care & Social Assistance (HC&SA) sector showed no signs of abating in September after creating of 1,200 new jobs during the month. No other region in the state benefited from positive HC&SA employment growth in September.
- ◆ The Social Assistance subsector enjoyed its strongest month of employment gains in more than a decade with the creation of 2,600 new jobs during September. However, these gains were erased by the corresponding loss of 2,600 HC&SA jobs in Ambulatory Health Care Services.
- ◆ Over the previous 12 months, the Social Assistance subsector has been responsible for more than 70% of all HC&SA employment growth. Meanwhile, due to the significant HC&SA job losses in Northern Virginia over the past year, Richmond currently enjoys a 12-month employment growth share that exceeds 100%.

Data in Brief

Not Seasonally Adjusted*	Employment, in Thousands				Growth Rate, Annualized		
	Sept. 2013	June 2014	Aug. 2014	Sept. 2014	12 Month	3 Month	1 Month
Virginia							
Total Nonfarm	3,772.8	3,809.1	3,779.6	3,781.1	0.2%	-2.9%	0.5%
Health Care & Social Assistance	410.1	414.9	415.9	415.4	1.3%	0.5%	-1.4%
Virginia Beach, Norfolk, Newport News							
Total Nonfarm	755.6	762.9	762.7	759.5	0.5%	-1.8%	-4.9%
Health Care & Social Assistance	87.5	88.9	88.7	88.2	0.8%	-3.1%	-6.6%
Northern Virginia							
Total Nonfarm	1,369.4	1,389.4	1,375.8	1,374.3	0.4%	-4.3%	-1.3%
Health Care & Social Assistance	113.9	113.7	112.8	111.8	-1.8%	-6.5%	-10.1%
Richmond							
Total Nonfarm	634.5	650.7	642.6	642.8	1.3%	-4.8%	0.4%
Health Care & Social Assistance	80.7	84.3	85.4	86.6	7.3%	11.4%	18.2%
Rest of Virginia							
Total Nonfarm	1,013.3	1,006.1	998.5	1,004.5	-0.9%	-0.6%	7.5%
Health Care & Social Assistance	128.0	128.0	129.0	128.8	0.6%	2.5%	-1.8%

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

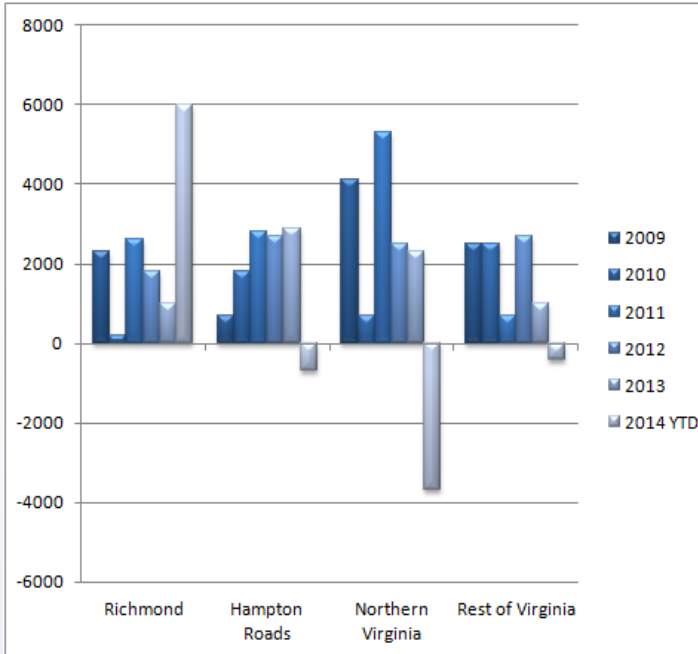


Figure 1: Annual Change in HC&SA Employment (Not Seasonally Adjusted, Change from Dec to Dec).

According to preliminary data released on October 21, 2014 by the U.S. Department of Labor, Bureau of Labor Statistics, Virginia's HC&SA sector lost 500 jobs in September. In addition, August's preliminary estimate for HC&SA employment was revised downward by 400. However, even after this revision, Virginia's HC&SA sector still added 400 jobs in August.

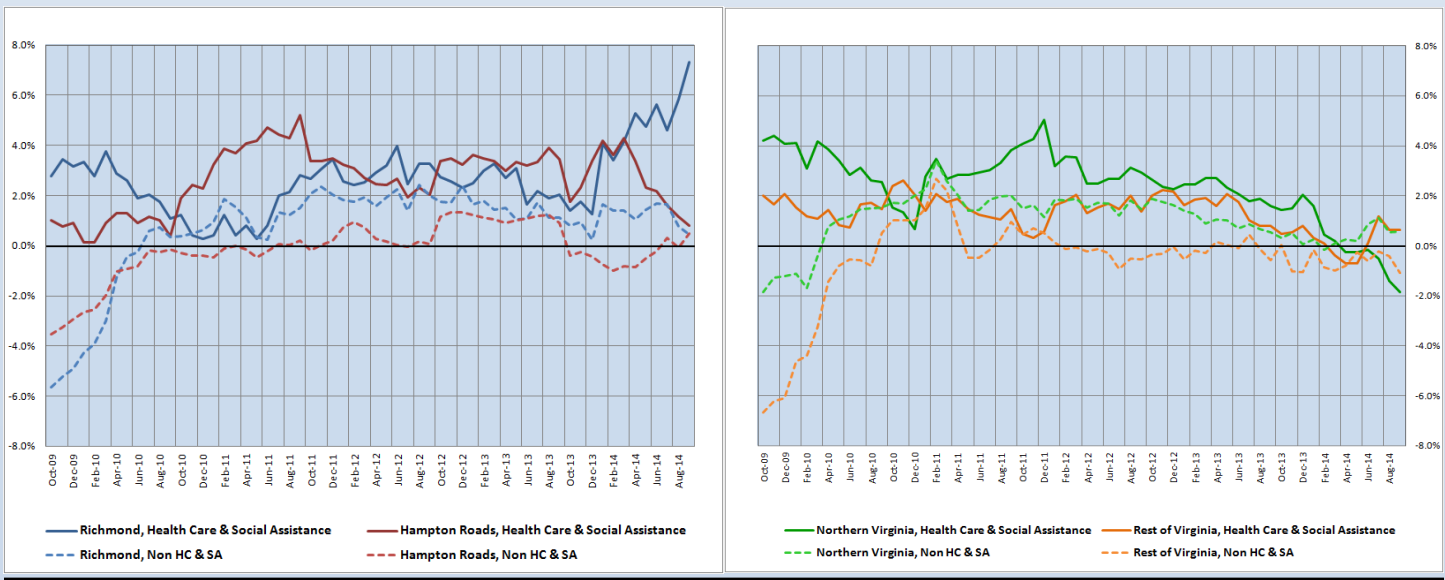
Richmond's HC&SA sector continued to experience tremendous employment growth in September with the addition of 1,200 new jobs. In addition, even though Richmond's preliminary HC&SA employment estimate for August underwent a significant downward revision of 1,700 jobs, the region still managed to create 1,300 HC&SA jobs during the month, its largest monthly gain in more than three years.

While Richmond's HC&SA sector continues to flourish, the other regions of the state have struggled to create HC&SA jobs. Northern Virginia lost 1,000 HC&SA jobs in September, Hampton Roads lost 500 HC&SA jobs, and the Rest of Virginia lost 200 HC&SA jobs during the month. Richmond remains the only region with positive year-to-date job growth.

Year-Over-Year Regional Employment Growth

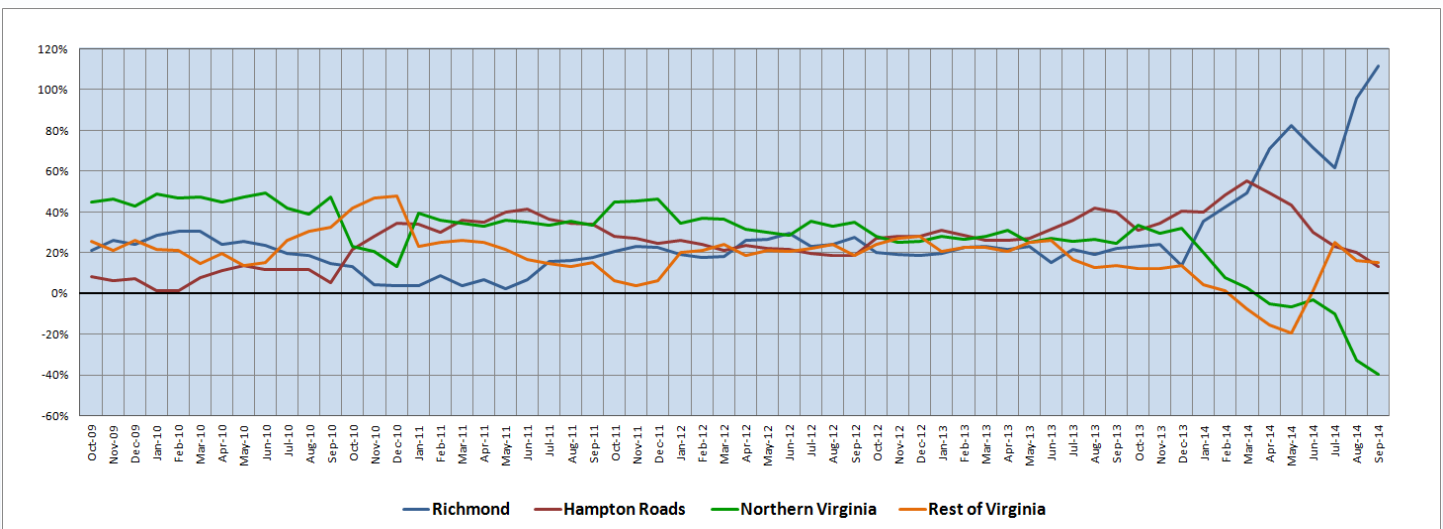
In recent months, Richmond's HC&SA employment growth rate has increasingly diverged from the other regions in Virginia. Richmond's year-over-year HC&SA employment growth rate spiked in September from 5.82% to 7.31%. Meanwhile, Hampton Roads' year-over-year HC&SA employment growth rate fell from 1.14% to 0.80% during the month. Although this still makes Hampton Roads the second-fastest growing region of the state in terms of HC&SA employment growth, its current value represents the slowest year-over-year growth for the region in four years. At the same time, Northern Virginia's year-over-year HC&SA employment growth rate dipped further into negative territory at -1.84% during the month.

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.



Over the past 12 months, Richmond's HC&SA sector has been responsible for 111.32% of all employment growth in Virginia. This is attributable to two main factors: Richmond's incredible employment growth in its HC&SA sector over the past year coupled with the declining fortunes of Northern Virginia's HC&SA sector. While Richmond has created 5,900 HC&SA jobs over the past year, Northern Virginia has shed 2,100 HC&SA jobs. In fact, Northern Virginia's 12-month HC&SA employment growth share has been declining steadily throughout most of 2014, reaching a new low of -39.62% in September. Hampton Roads has experienced a similar, albeit less dramatic, decline during the same time period. Since March, Hampton Roads' 12-month HC&SA employment growth share has fallen by 76% to a year-to-date low 13.21% in September.

Subsector Employment Growth

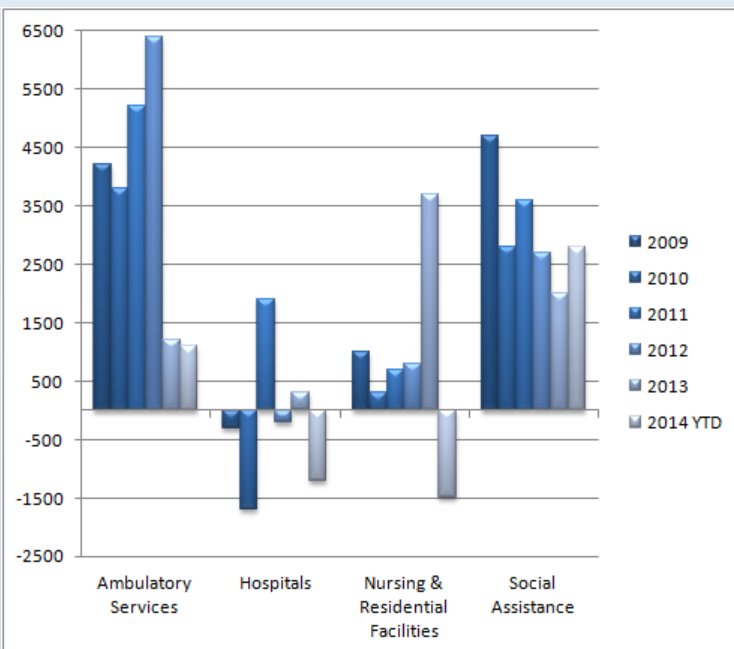


Figure 4: Annual & YTD Change in HC&SA Subsector Employment (Not Seasonally Adjusted, Dec. to Dec.)

After a very strong month in August with an increase of 1,600 new jobs, the Social Assistance subsector did even better in September after creating an additional 2,600 jobs, which represents its best one-month performance in more than a decade. Thanks to September's employment growth, the Social Assistance subsector has now produced 2,800 jobs year-to-date, the most of any HC&SA subsector in Virginia.

Ambulatory Health Care Services had been the strongest HC&SA subsector in terms of year-to-date job growth, but the loss of 2,600 jobs in September erased most of its gains for the year. Regardless, this subsector has still produced 1,100 jobs so far this year.

Meanwhile, Nursing & Residential Care Facilities lost 400 HC&SA jobs in September, and Hospitals experienced its second consecutive month of employment losses, although this month's decline was a relatively modest 100 jobs. Both of these HC&SA subsectors have lost in excess of 1,000 jobs through the first nine months of 2014.

Distribution of Growth by Subsector

Not Seasonally Adjusted	Employment, in Thousands				Growth Rate, Annualized		
	Sept. 2013	June 2014	Aug. 2014	Sept. 2014	12 Month	3 Month	1 Month
Virginia							
Health Care & Social Assistance	410.1	414.9	415.9	415.4	1.3%	0.5%	-1.4%
<i>Ambulatory Health Care Services</i>	159.7	161.7	163.2	160.6	0.6%	-2.7%	-17.5%
<i>Hospitals</i>	109.2	108.5	108.6	108.5	-0.6%	0.0%	-1.1%
<i>Nursing & Residential Care Facilities</i>	71.5	72.8	73.2	72.8	1.8%	0.0%	-6.4%
<i>Social Assistance</i>	69.7	71.9	70.9	73.5	5.5%	9.2%	54.1%
Virginia Beach, Norfolk, Newport News							
Health Care & Social Assistance	87.5	88.9	88.7	88.2	0.8%	-3.1%	-6.6%
<i>Hospitals</i>	23.0	22.6	22.6	22.5	-2.2%	-1.8%	-5.2%
Northern Virginia							
Health Care & Social Assistance	113.9	113.7	112.8	111.8	-1.8%	-6.5%	-10.1%
<i>Ambulatory Health Care Services</i>	52.5	52.7	53.3	51.9	-1.1%	-5.9%	-27.3%
<i>Hospitals</i>	24.5	23.7	23.5	23.6	-3.7%	-1.7%	5.2%

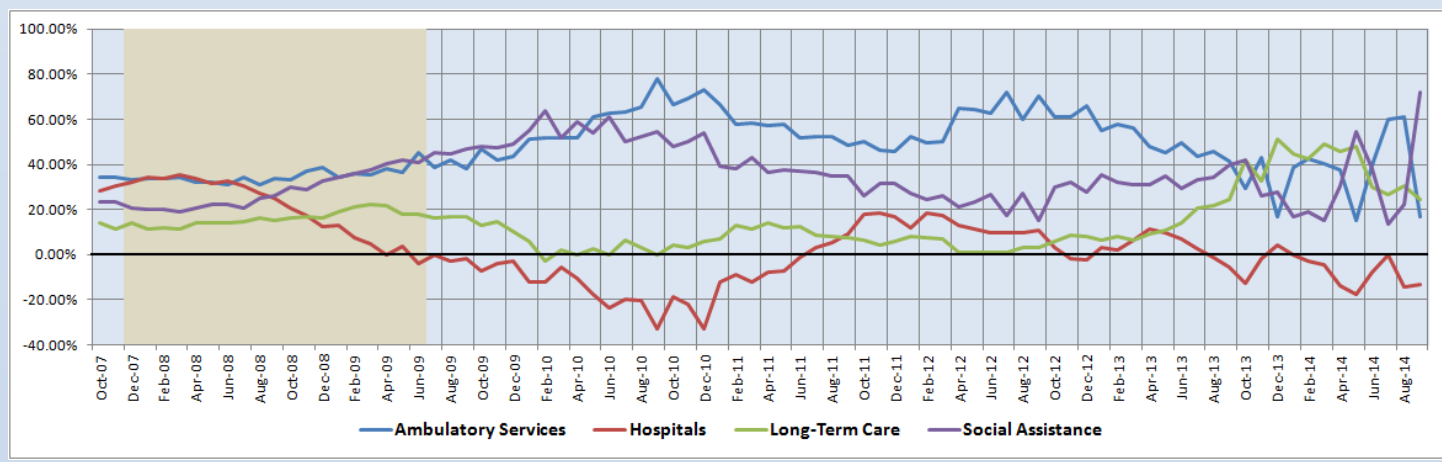
Preliminary estimates are italicized

The Social Assistance subsector is currently growing at a 12-month annualized growth rate of 5.5%, and this growth has only accelerated in more recent months. Its three-month annualized growth rate is at 9.2%, while its one-month annualized growth in September was an astronomical 54.1%. Meanwhile, the growth rates for the other three HC&SA subsectors has been more subdued. None of these other HC&SA subsectors currently sport positive one-month or three-month annualized growth rates. However, Nursing & Residential Care Facilities does have a somewhat more favorable 12-month annualized employment growth rate of 1.8%, which exceeds the statewide average of 1.3% for Virginia's HC&SA sector.

Share of 12-Month Growth by Subsector

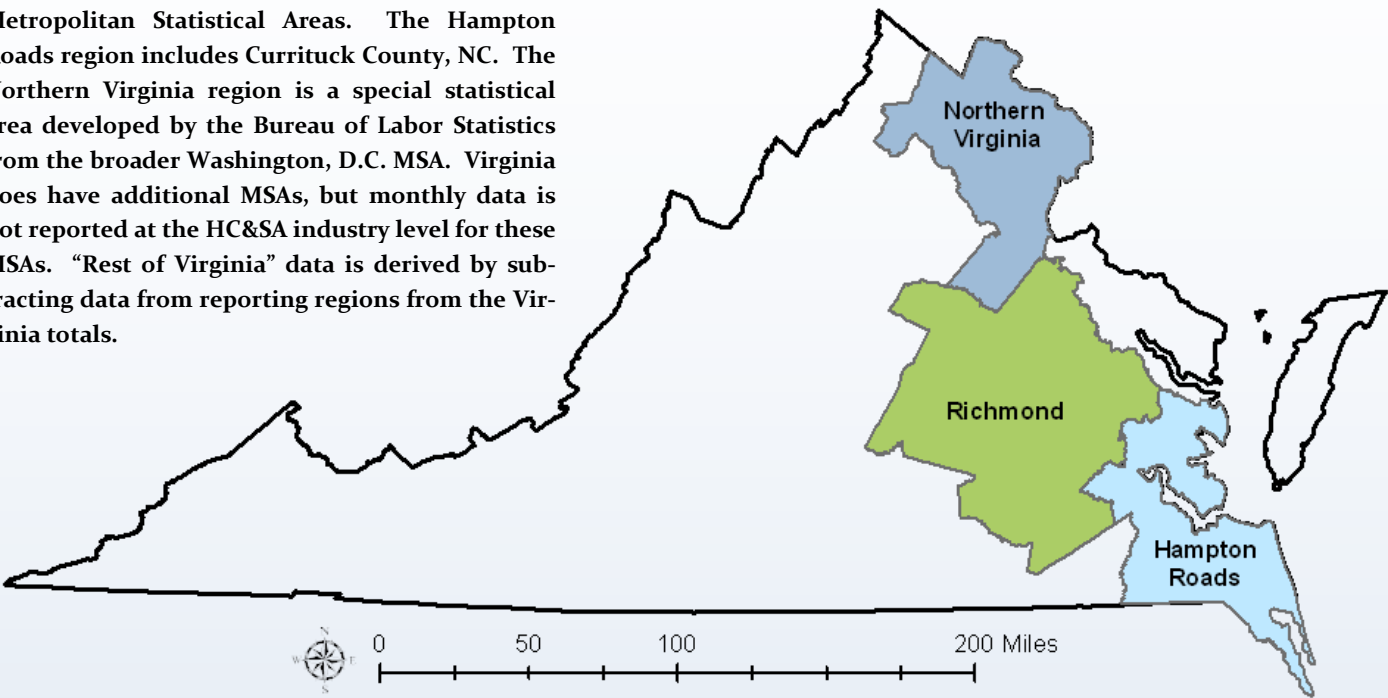
Given the large employment swings in both the Ambulatory Health Care Services and Social Assistance subsectors in September, their respective 12-month employment growth shares experienced wild swings during the month. After losing 2,600 jobs in September, Ambulatory Health Care Services saw its 12-month employment growth share fall from 61.22% to 16.98%. At the same time, Social Assistance saw its 12-month employment growth share rise from 22.45% to 71.70% after adding 2,600 jobs during the month. Meanwhile, Nursing & Residential Care Facilities experienced a small decline in its 12-month growth share to 24.53%, and Hospitals maintained a negative growth share 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			

Healthcare Workforce Data Center

Perimeter Center
9960 Mayland Drive, Suite 300
Henrico, VA 23233-1463

Phone: (804) 367-2115
Fax: (804) 527-4434
E-mail: hwdc@dhp.virginia.gov

www.dhp.virginia.gov/hwdc/

*Virginia Healthcare Workforce Briefs are produced by
Justin Crow, MPA
HWDC Research Analyst
&
Christopher Coyle
HWDC Research Assistant*

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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).