



Virginia Healthcare Workforce Briefs

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

Series 2, Issue 73

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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 are not seasonally adjusted. Self-employed persons, including health professionals in private practice, are not included.

Highlights

- ◆ Data in this series are not seasonally adjusted and exhibit short-term volatility from fluctuations in holidays, weekends, weather and other seasonal factors. Estimates for the most recent month are preliminary.
- ◆ Virginia's Health Care & Social Assistance (HC&SA) sector created 1,100 jobs in March, which represents a one-month annualized employment growth rate of 3.1%. However, Virginia's HC&SA sector still lost 1,600 jobs during the first quarter of 2018, which translates into a -1.5% annualized growth rate.
- ◆ Richmond's HC&SA sector created 500 jobs in March. Thanks to this gain, Richmond is the only region in the state that increased HC&SA employment in Q1 2018. Meanwhile, the Rest of Virginia also created 500 HC&SA jobs in March. Northern Virginia's HC&SA sector created 300 jobs, while Hampton Roads lost 200 HC&SA jobs.
- ◆ Ambulatory Health Care Services enjoyed a strong month of HC&SA employment growth with the creation of 1,900 jobs in March. Virginia's Hospitals also increased employment with a gain of 400 jobs. However, Nursing & Residential Care Facilities lost 800 jobs, and employment in Social Assistance fell by 400.

Data in Brief

Not Seasonally Adjusted*	Employment, in Thousands				Growth Rate, Annualized		
	Mar. 2017	Dec. 2017	Feb. 2018	Mar. 2018	12 Month	3 Month	1 Month
Virginia							
Total Nonfarm	3,917.6	3,976.6	3,941.5	3,959.7	1.1%	-1.7%	5.7%
Health Care & Social Assistance	432.4	435.1	432.4	433.5	0.3%	-1.5%	3.1%
Hampton Roads							
Total Nonfarm	772.9	779.5	769.4	773.5	0.1%	-3.0%	6.6%
Health Care & Social Assistance	92.5	91.8	90.8	90.6	-2.1%	-5.1%	-2.6%
Northern Virginia							
Total Nonfarm	1,441.8	1,480.9	1,468.3	1,468.2	1.8%	-3.4%	-0.1%
Health Care & Social Assistance	127.6	131.2	130.8	131.1	2.7%	-0.3%	2.8%
Richmond							
Total Nonfarm	666.2	675.2	667.8	670.3	0.6%	-2.9%	4.6%
Health Care & Social Assistance	84.0	82.2	82.1	82.6	-1.7%	2.0%	7.6%
Rest of Virginia							
Total Nonfarm	1,036.7	1,041.0	1,036.0	1,047.7	1.1%	2.6%	14.4%
Health Care & Social Assistance	128.3	129.9	128.7	129.2	0.7%	-2.1%	4.8%

Preliminary estimates are italicized

*Seasonally adjusted data are 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 have been seasonally adjusted.

Regional HC&SA Employment Growth, Level

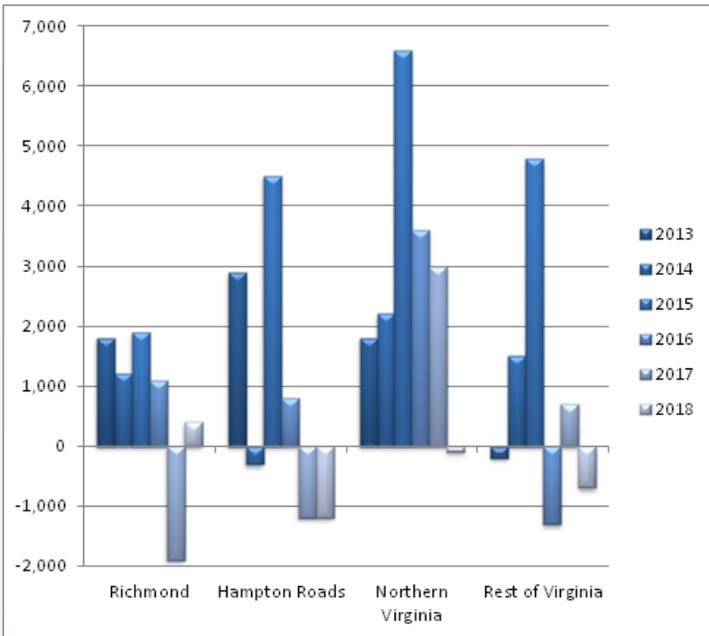


Figure 1: Annual & YTD Change in HC&SA Regional Employment (Not Seasonally Adjusted, Full-Year Change for 2013-2017, Jan.-Mar. for 2018).

According to data released on Friday, April 20, 2018, by the U.S. Department of Labor, Bureau of Labor Statistics, Virginia’s Health Care & Social Assistance (HC&SA) sector created 1,100 jobs in March, which represents a one-month annualized employment growth rate of 3.1%. Despite March’s strong employment growth, employment in Virginia’s HC&SA sector fell by 1,600 during the first quarter of 2018. This loss translates into a three-month annualized growth rate of -1.5%.

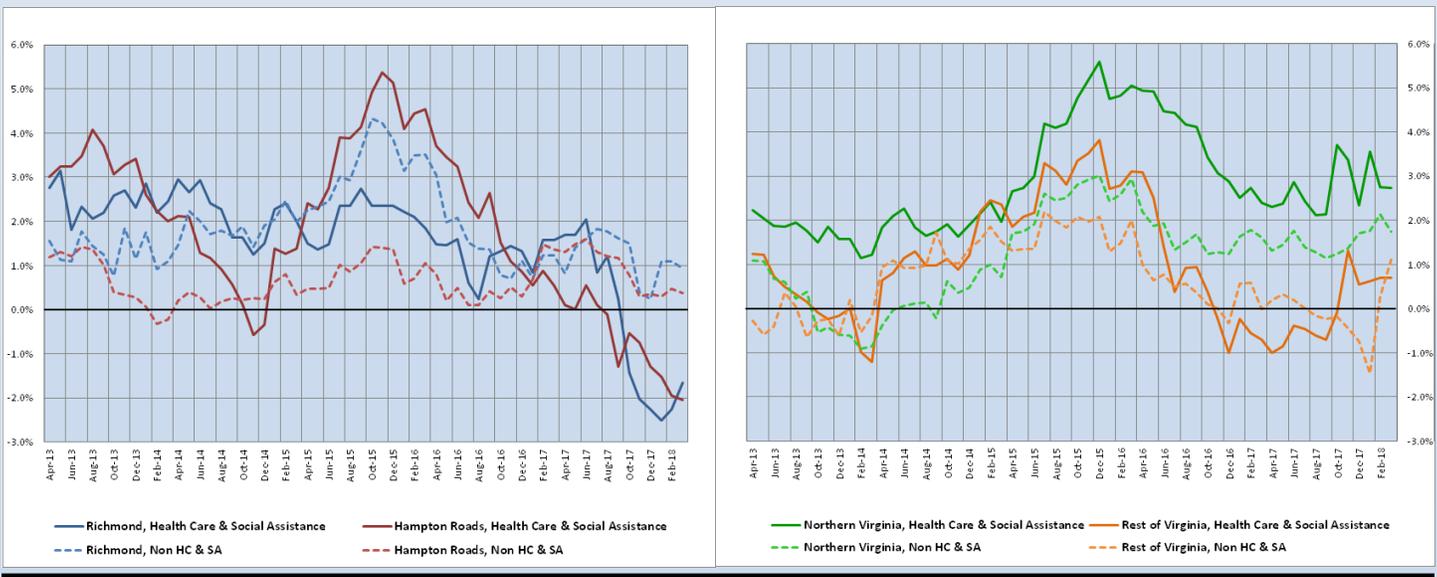
Richmond’s HC&SA sector enjoyed the strongest employment growth in March after adding 500 new jobs in the region. This gain translates into a 7.6% annualized growth rate. In addition, Richmond is the only region in the state that experienced a net positive change in HC&SA employment during Q1 2018.

The Rest of Virginia also added 500 HC&SA jobs in March, which represents a 4.8% annualized growth rate. Northern Virginia created 300 HC&SA jobs, while Hampton Roads saw HC&SA employment fall by 200 during the month.

Year-Over-Year Regional Employment Growth

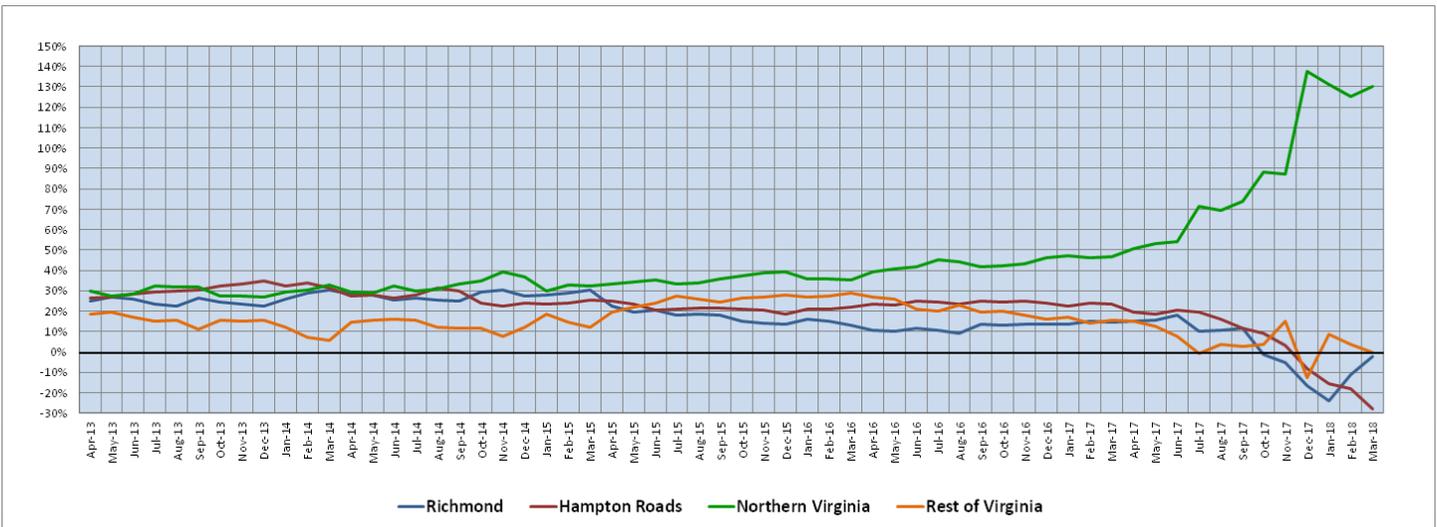
Although Richmond is currently the strongest driver of HC&SA employment growth in the state, its year-over-year HC&SA employment growth rate remains negative. In March, its growth rate increased from -2.26% to -1.67%. With this result, Richmond’s year-over-year HC&SA employment growth rate has now been negative for six consecutive months. Meanwhile, the year-over-year HC&SA employment growth rate in Hampton Roads fell for the fifth consecutive month. This region saw its growth rate decline from -1.94% to -2.05% in March. The year-over-year HC&SA employment growth rate in the Rest of Virginia remained at 0.70%, while Northern Virginia’s HC&SA sector saw its growth rate fall slightly to 2.74%.

Figure 2: Year-Over-Year Employment Growth (Not Seasonally Adjusted).



Regional Share of 24-month Growth

Figure 3: Regional Share of Previous 24-Month Employment Growth in Virginia’s HC&SA Sector, Not Seasonally Adjusted.



Richmond’s 24-month HC&SA employment growth share reached its highest value in five months. Regardless, its growth share remained negative after increasing from -10.91% to -2.00% in March. On the other hand, the 24-month HC&SA employment growth share in Hampton Roads continued to decline in March from -18.18% to -28.00%. With this result, the 24-month HC&SA employment growth share in Hampton Roads has now fallen for nine consecutive months. As for the Rest of Virginia, its 24-month HC&SA employment growth share fell from 3.64% to 0.00%. Northern Virginia is now the only region in the state where HC&SA employment has grown over the past two years. In March, its 24-month HC&SA employment growth share increased from 125.45% to 130.00%.

Subsector Employment Growth

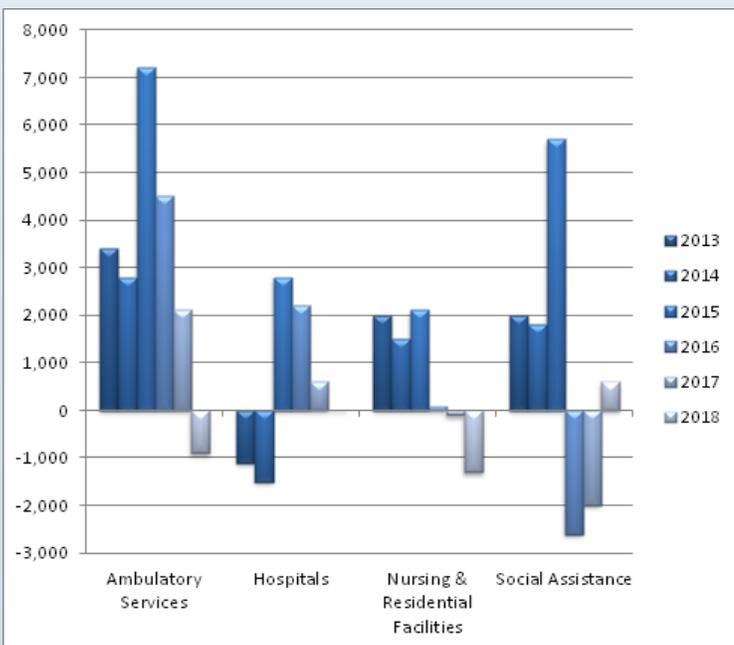


Figure 4: Annual & YTD Change in HC&SA Subsector Employment (Not Seasonally Adjusted, Full-Year Change for 2013-2017, Jan.-Mar. for 2018).

Ambulatory Health Care Services enjoyed a very strong month of positive employment growth in March after creating 1,900 new HC&SA jobs across the state. This monthly employment gain broke a three-month streak of negative job growth. Regardless, Ambulatory Health Care Services experienced a decline in employment growth in Q1 2018 after losing 900 jobs over the first three months of the year.

In Q1 2018, Social Assistance was the only HC&SA subsector in the state that created jobs. Despite losing 400 jobs in March, this subsector still increased HC&SA employment by 600 in Q1 2018. Nursing & Residential Care Facilities also experienced a decline in HC&SA employment in March after losing 800 jobs during the month. This subsector has lost jobs in each of the first three months of 2018. In total, employment has declined by 1,300 in this subsector in Q1 2018.

As for Virginia’s Hospitals, this subsector created 400 new HC&SA jobs in March.

Distribution of Growth by Subsector

Not Seasonally Adjusted	Employment, in Thousands				Growth Rate, Annualized		
	Mar. 2017	Dec. 2017	Feb. 2018	Mar. 2018	12 Month	3 Month	1 Month
Virginia							
Health Care & Social Assistance	432.4	435.1	432.4	433.5	0.3%	-1.5%	3.1%
<i>Ambulatory Health Care Services</i>	174.9	178.3	175.5	177.4	1.4%	-2.0%	13.8%
<i>Hospitals</i>	106.8	107.0	106.6	107.0	0.2%	0.0%	4.6%
<i>Nursing & Residential Care Facilities</i>	76.2	76.2	75.7	74.9	-1.7%	-6.7%	-12.0%
<i>Social Assistance</i>	74.5	73.6	74.6	74.2	-0.4%	3.3%	-6.2%
Hampton Roads							
Health Care & Social Assistance	92.5	91.8	90.8	90.6	-2.1%	-5.1%	-2.6%
<i>Hospitals</i>	22.5	22.4	22.4	22.5	0.0%	1.8%	5.5%
Northern Virginia							
Health Care & Social Assistance	127.6	131.2	130.8	131.1	2.7%	-0.3%	2.8%
<i>Ambulatory Health Care Services</i>	60.6	63.8	63.3	63.8	5.3%	0.0%	9.9%
<i>Hospitals</i>	25.1	25.8	25.7	25.9	3.2%	1.6%	9.7%

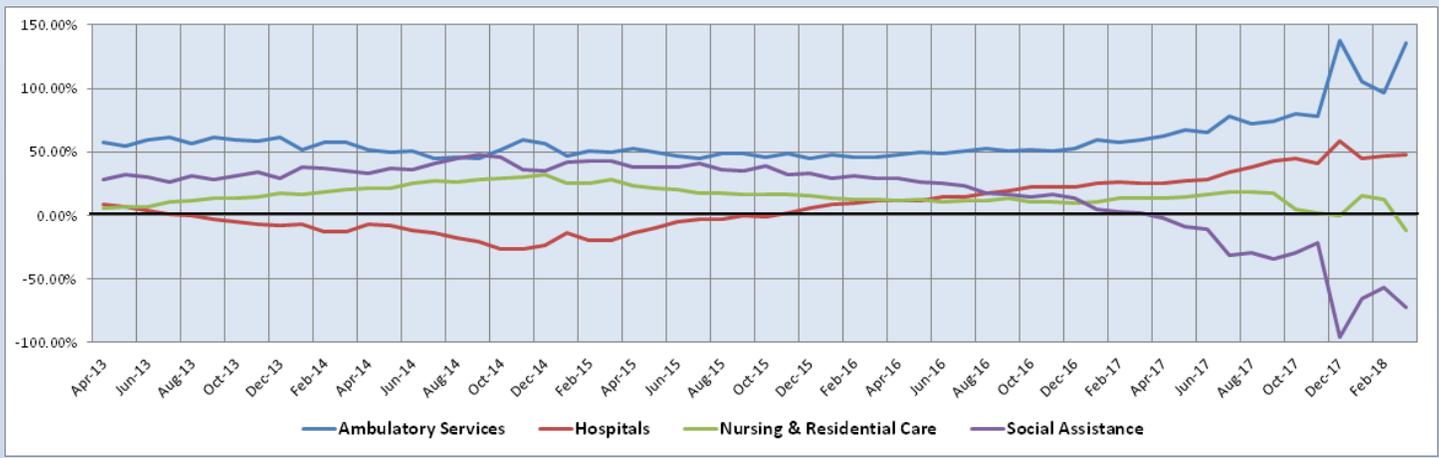
Preliminary estimates are italicized

Employment in Virginia’s Ambulatory Health Care Services subsector grew at a 13.8% annualized rate in March. This growth rate is more than four times the statewide HC&SA average during the month. In addition, this subsector currently sports the highest 12-month employment growth rate in the state at 1.4%. Virginia’s Hospitals also enjoyed strong employment growth in March with a 4.6% annualized growth rate. Virginia’s Hospitals are also the only other HC&SA subsector that currently has a positive 12-month HC&SA employment growth rate. Meanwhile, Social Assistance was the only HC&SA subsector to increase employment in Q1 2018. Its three-month annualized employment growth rate is currently 3.3%.

Share of 24-Month Growth by Subsector

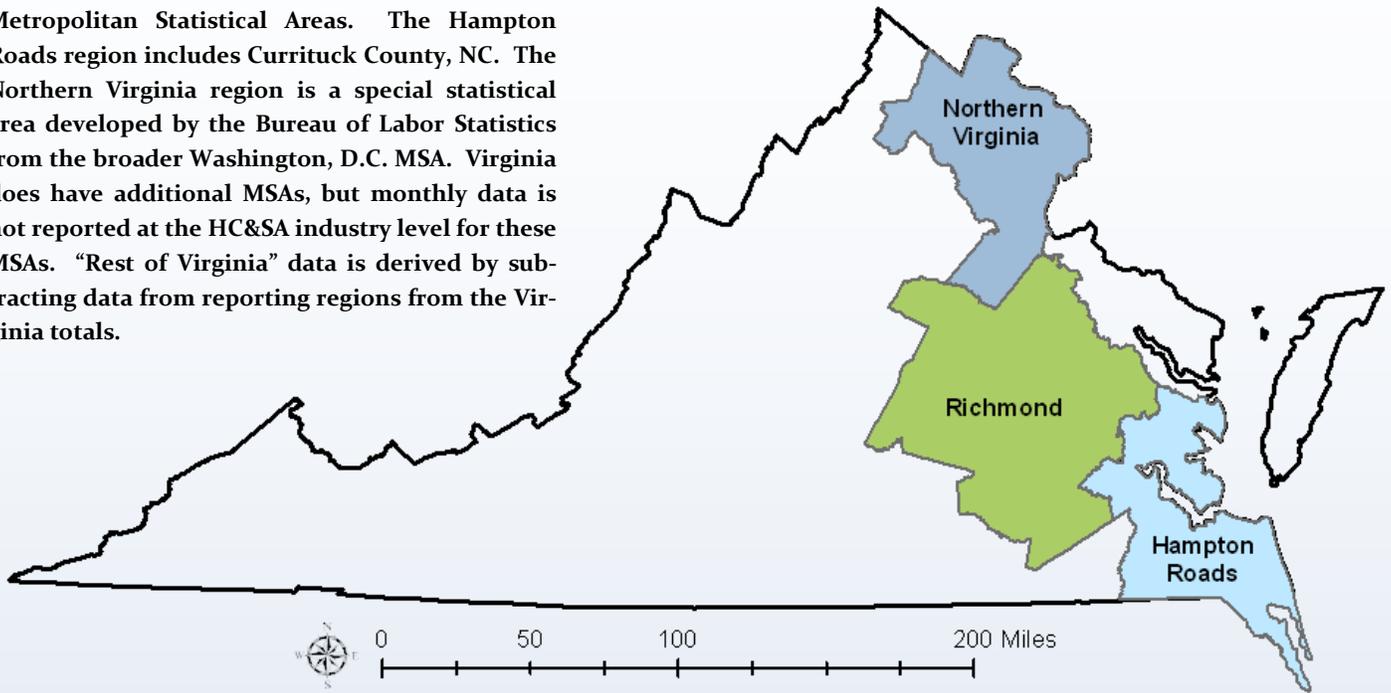
Given its strong job gains in March, the 24-month HC&SA employment growth share of Ambulatory Health Care Services increased dramatically from 96.36% to 136.00%. At its current level, the 24-month HC&SA employment growth share of Ambulatory Health Care Services nearly returned to its recent high of 137.50% in December of 2017. As for Virginia’s Hospitals, its 24-month HC&SA employment growth share edged upward during the month from 47.27% to 48.00%. Meanwhile, Virginia’s two other HC&SA subsectors currently have negative growth shares. Nursing & Residential Care Facilities saw its growth share fall from 12.73% to -12.00%, while Social Assistance experienced its own decline from -56.36% to -72.00%.

Figure 5: Share of Previous 24-Month Growth in Virginia’s HC&SA Subsectors (Not Seasonally Adjusted).



Region Map

HWDC *Briefing Series* 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 are from the US Department of Labor Bureau of Labor Statistics' Current Employment Statistics program. The CES program surveys about 143,000 businesses and government agencies monthly. Unless otherwise noted, this series uses data that are 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).
- ◆ 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)