



Virginia Healthcare Workforce Briefs

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

Series 2, Issue 35

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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.
- ◆ Once again, regional Health Care & Social Assistance (HC&SA) employment was driven by growth in Northern Virginia during the month of November. After losing 3,600 jobs through the first nine months of 2014, Northern Virginia's HC&SA sector has created 4,300 jobs in the past two months, including 1,600 jobs in November.
- ◆ Hampton Roads also increased HC&SA employment in November, although the gains were limited to just 200 new jobs. Richmond lost 700 HC&SA jobs during the month, which represents its first monthly employment decline since July. Meanwhile, the Rest of Virginia lost HC&SA jobs for the third consecutive month in November.
- ◆ Ambulatory Health Care Services was the main driver of Virginia's HC&SA subsector employment growth in November with the creation of 600 jobs. Hospitals and Nursing & Residential Care Facilities also contributed positively to HC&SA employment gains in November; these two subsectors combined to add another 600 HC&SA jobs.

Data in Brief

Not Seasonally Adjusted*	Employment, in Thousands				Growth Rate, Annualized		
	Nov. 2013	Aug. 2014	Oct. 2014	Nov. 2014	12 Month	3 Month	1 Month
Virginia							
Total Nonfarm	3,797.0	3,779.6	3,796.9	3,810.3	0.4%	3.3%	4.3%
Health Care & Social Assistance	412.2	415.9	417.9	418.7	1.6%	2.7%	2.3%
Virginia Beach, Norfolk, Newport News							
Total Nonfarm	754.2	762.7	756.6	761.8	1.0%	-0.5%	8.6%
Health Care & Social Assistance	88.0	88.7	88.2	88.4	0.5%	-1.3%	2.8%
Northern Virginia							
Total Nonfarm	1,384.4	1,375.8	1,377.3	1,390.9	0.5%	4.5%	12.5%
Health Care & Social Assistance	114.5	112.8	114.6	116.2	1.5%	12.6%	18.1%
Richmond							
Total Nonfarm	641.3	642.6	649.1	653.8	1.9%	7.2%	9.0%
Health Care & Social Assistance	80.9	85.4	86.9	86.2	6.6%	3.8%	-9.2%
Rest of Virginia							
Total Nonfarm	1,017.1	998.5	1,013.9	1,003.8	-1.3%	2.1%	-11.3%
Health Care & Social Assistance	128.8	129.0	128.2	127.9	-0.7%	-3.4%	-2.8%

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

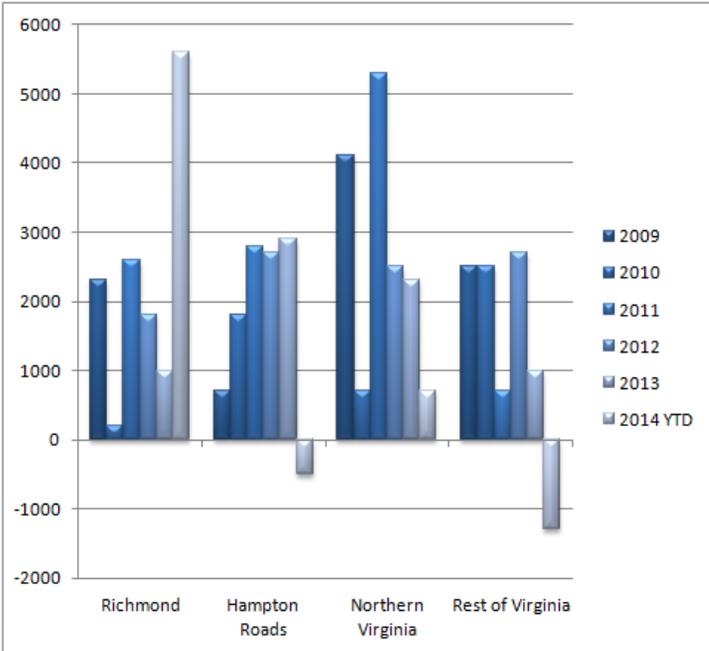


Figure 1: Annual Change in HC&SA Employment (Not Seasonally Adjusted, Change from Dec to Dec).

According to preliminary data released on December 19, 2014 by the U.S. Department of Labor, Bureau of Labor Statistics, Virginia’s HC&SA sector added 800 jobs in November. Meanwhile, although the preliminary HC&SA employment estimate for October was revised downward by 700 jobs, the sector still created 3,100 jobs during the month, which represents its strongest monthly gain in four years.

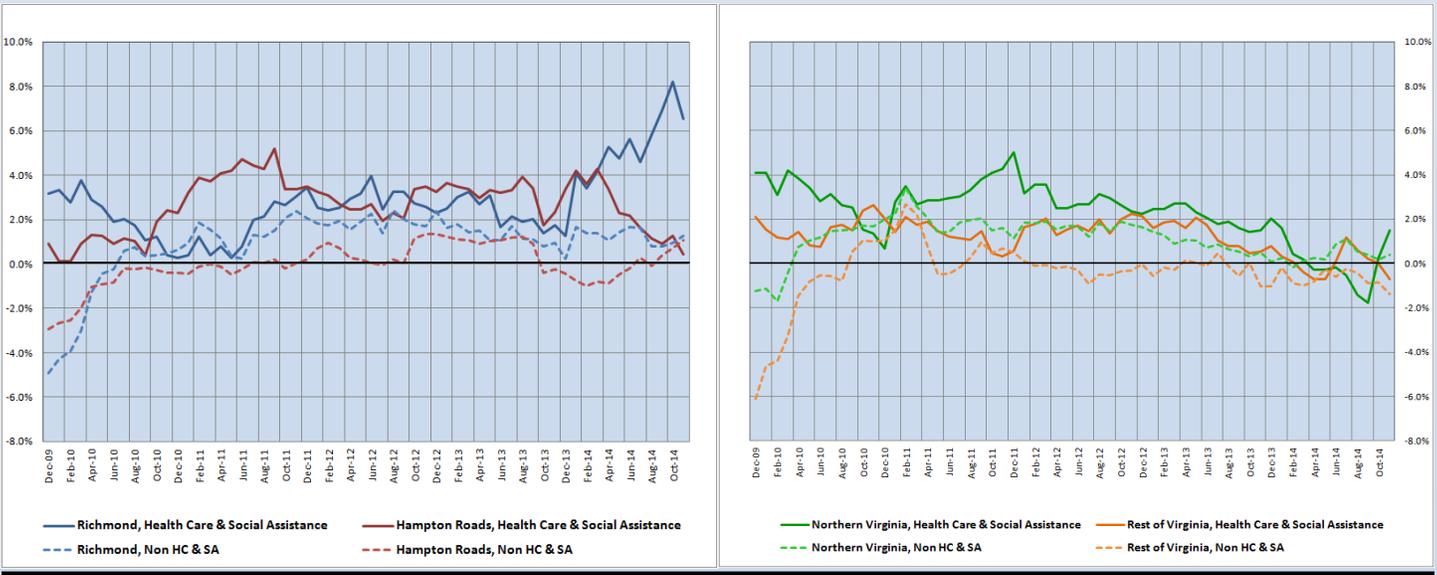
In what can only be described as a remarkable turnaround, Northern Virginia’s HC&SA sector has come to life in the past two months. Employment in Northern Virginia’s HC&SA sector had fallen in seven of the first nine months of 2014, at which time its year-to-date employment losses totaled 3,600. However, in just the past two months, Northern Virginia’s HC&SA sector has created 4,300 jobs, completely erasing all the losses from earlier in the year.

Hampton Roads also added HC&SA jobs in November, although the gain was a relatively modest 200 jobs. Meanwhile, Richmond lost 700 HC&SA jobs in November, and the Rest of the Virginia lost 300 HC&SA jobs during the month.

Year-Over-Year Regional Employment Growth

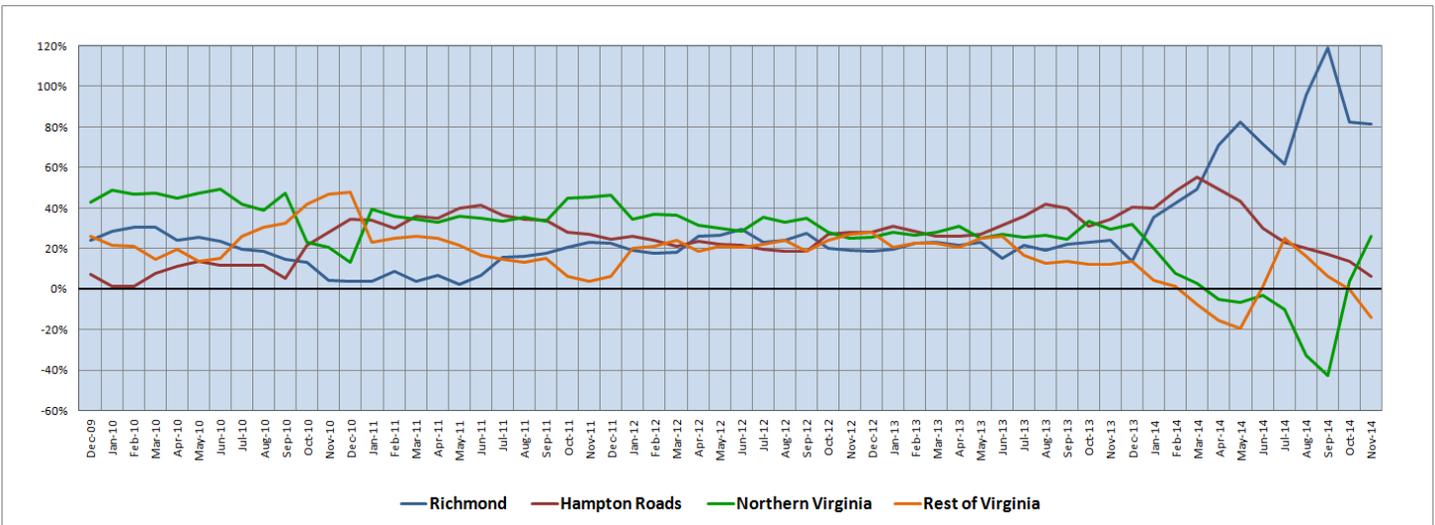
In September, Northern Virginia’s year-over-year HC&SA employment growth rate fell to -1.76% , its lowest value in more than a decade. Since then, however, Northern Virginia’s year-over-year HC&SA employment growth rate has jumped up to 1.48% , and it is now the second fastest-growing region in the state. That title had belonged to Hampton Roads, but its year-over-year HC&SA employment growth rate fell to 0.45% in November, reaching lows not seen since 2010. Despite November’s job losses, Richmond remains by far the fastest-growing region of the state with year-over-year HC&SA employment growth of 6.55% . The Rest of Virginia, on the other hand, has seen HC&SA employment decline over the past year.

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.



Thanks to Northern Virginia’s employment resurgence during the past two months, its 12-month HC&SA employment growth share has risen dramatically to 26.15% in November, its highest value in 2014. Every other region in Virginia lost growth share to Northern Virginia during the month. The decline was most dramatic in the Rest of Virginia: its 12-month HC&SA employment growth share, which had fallen to 0.00% in October, fell yet again in November to -13.85%. Meanwhile, Hampton Roads lost more than half its 12-month HC&SA employment growth share, which declined from 13.75% in October to 6.15% in November. Richmond experienced a modest decline in its growth share in November, but the region can still boast of contributing more than 80% of all HC&SA employment growth in the state over the past 12 months.

Subsector Employment Growth

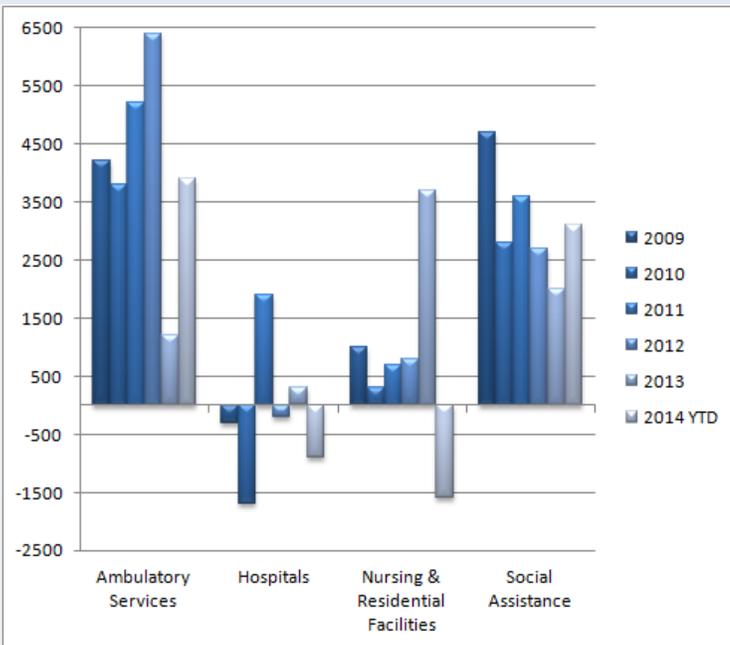


Figure 4: Annual & YTD Change in HC&SA Subsector Employment (Not Seasonally Adjusted, Dec. to Dec.)

Three of Virginia’s four HC&SA subsectors added jobs in November. For the second consecutive month, Ambulatory Health Care Services was the strongest contributor to HC&SA job gains, although the 600 jobs created in November is only a fraction of the 2,300 jobs added during the previous month. Meanwhile, Hospitals created 400 jobs in November, which represents its strongest monthly performance since July, and the Nursing & Residential Care Facilities subsector contributed 200 new jobs to the state’s economy. Only Social Assistance failed to partake in November’s job gains as the subsector lost 400 jobs in November.

Given the small changes in November’s employment levels, the year-to-date gains of Virginia’s HC&SA subsectors did not change much, and Ambulatory Health Care Services and Social Assistance remain the two HC&SA subsectors with positive job growth in 2014. So far this year, Ambulatory Health Care Services has added 3,900 jobs, while Social Assistance has created 3,100 new jobs.

Distribution of Growth by Subsector

Not Seasonally Adjusted	Employment, in Thousands				Growth Rate, Annualized		
	Nov. 2013	Aug. 2014	Oct. 2014	Nov. 2014	12 Month	3 Month	1 Month
Virginia							
Health Care & Social Assistance	412.2	415.9	417.9	418.7	1.6%	2.7%	2.3%
<i>Ambulatory Health Care Services</i>	160.3	163.2	162.8	163.4	1.9%	0.5%	4.5%
<i>Hospitals</i>	109.1	108.6	108.4	108.8	-0.3%	0.7%	4.5%
<i>Nursing & Residential Care Facilities</i>	72.4	73.2	72.5	72.7	0.4%	-2.7%	3.4%
<i>Social Assistance</i>	70.4	70.9	74.2	73.8	4.8%	17.4%	-6.3%
Virginia Beach, Norfolk, Newport News							
Health Care & Social Assistance	88.0	88.7	88.2	88.4	0.5%	-1.3%	2.8%
<i>Hospitals</i>	23.1	22.6	22.3	22.2	-3.9%	-6.9%	-5.3%
Northern Virginia							
Health Care & Social Assistance	114.5	112.8	114.6	116.2	1.5%	12.6%	18.1%
<i>Ambulatory Health Care Services</i>	52.9	53.3	53.7	54.4	2.8%	8.5%	16.8%
<i>Hospitals</i>	24.2	23.5	23.6	23.8	-1.7%	5.2%	10.7%

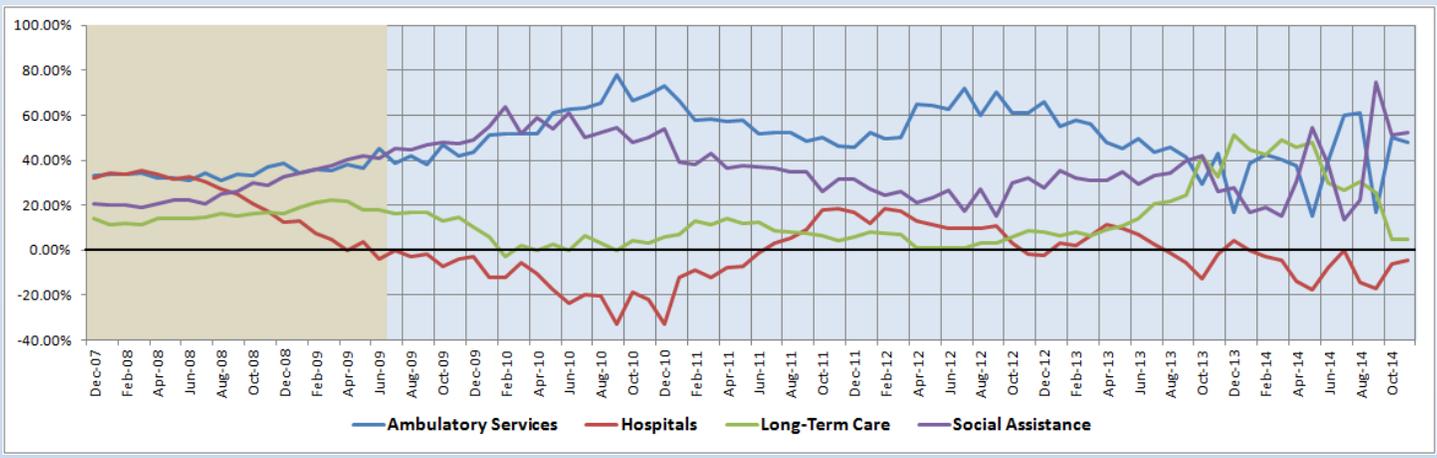
Preliminary estimates are italicized

With a 12-month annualized employment growth rate of 4.8%, Social Assistance remains the fastest-growth HC&SA subsector in Virginia. In addition, even though Social Assistance lost 400 jobs in November, its three-month annualized employment growth rate remains an impressive 17.4%. Relative to the Social Assistance subsector, long-term employment growth in Virginia’s three other HC&SA subsectors appears rather weak, with only Ambulatory Health Care Services currently sporting a 12-month annualized employment growth rate above the overall average for the HC&SA sector. However, all three of these HC&SA subsectors did enjoy strong one-month annualized employment growth rates in November.

Share of 12-Month Growth by Subsector

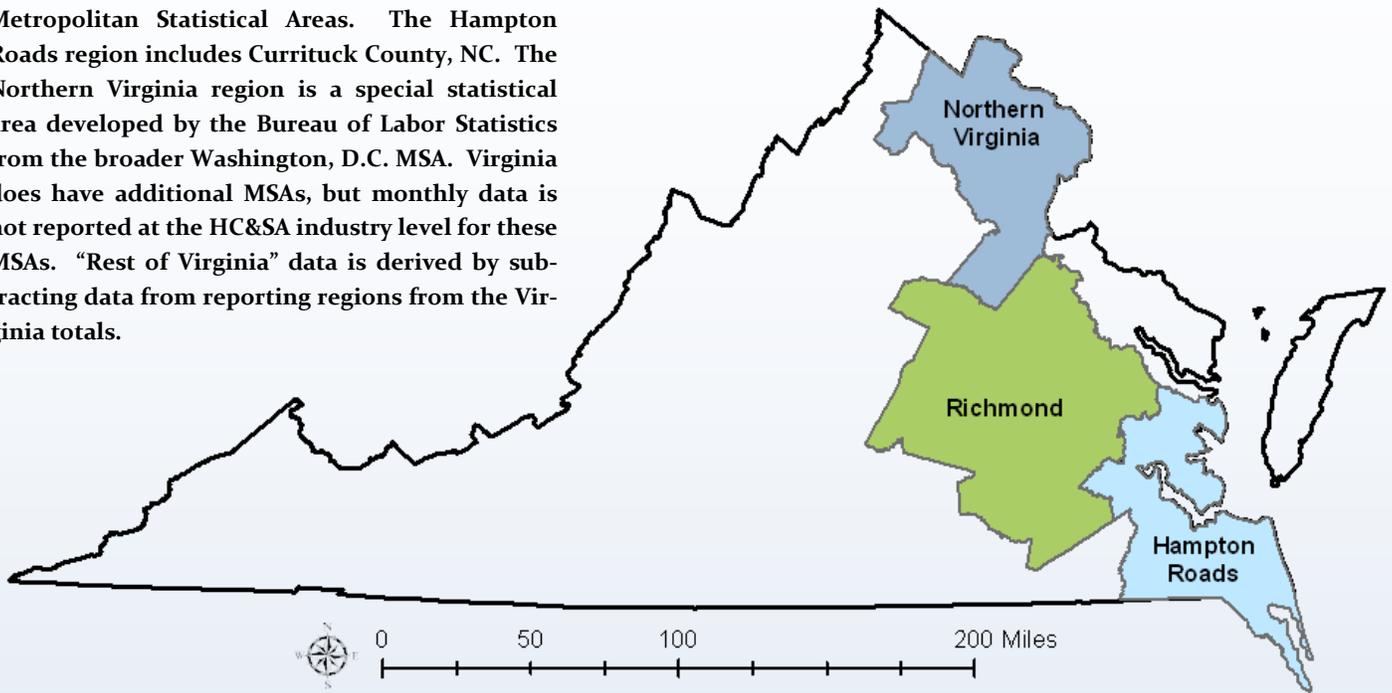
Over the past 12 months, HC&SA employment growth in Virginia’s HC&SA sector has been driven by gains in the Social Assistance and Ambulatory Health Care Services subsectors. Social Assistance currently has a 12-month employment growth share of 52.31%, while Ambulatory Health Care Services is close behind at 47.69%. Nursing & Residential Care Facilities remains a positive contributor to HC&SA employment growth, but its growth share has decline precipitously throughout 2014, falling from a high of 49.25% in March to just 4.62% in November. Meanwhile, the growth share of the Hospitals subsector remained negative in November, although it did improve slightly to -4.62% 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)