VIRGINIA
Department of Health Professions

HEALTHCARE WORKFORCE DATA CENTER

Virginia Healthcare Workforce Briefs

Indicators from the Bureau of Labor Statistics' Current Employment Statistics Survey

Series 2: Regional & Sectoral Employment

Series 2, Issue 30 July 2014

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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.
- Most of the job growth in Virginia's HC&SA sector took place outside of its three metropolitan statistical areas (MSAs). The Rest of Virginia added 900 HC&SA jobs in June, while Hampton Roads increased HC&SA employment by 100. Northern Virginia was the only region to lose HC&SA jobs in June, with employment falling by 500.
- Nearly all HC&SA job growth occurred in the Ambulatory Health Care Services subsector, where 1,400 jobs were created. However, these gains were mitigated by the loss of 900 HC&SA jobs in the Social Assistance subsector. Meanwhile, Nursing & Residential Care Facilities added 100 HC&SA jobs, and Hospitals lost 100 jobs.
- Through the first half of 2014, Richmond has created 3,400 HC&SA jobs. No other region in the state has contributed positively to HC&SA employment growth. With respect to HC&SA subsectors, all year-to-date employment gains have occurred in Ambulatory Health Care Services and Social Assistance.

Data in Brief

Not Seasonally Adjusted*	Employment, in Thousands				Growth Rate, Annualized		
	June 2013	Mar. 2014	May 2014	June 2014	12 Month	3 Month	1 Month
Virginia							
Total Nonfarm	3,789.6	3,741.5	3,785.3	*3,803.8*	0.4%	6.8%	6.0%
Health Care & Social Assistance	408.6	413.8	414.0	*414.5*	1.4%	0.7%	1.5%
Virginia Beach, Norfolk, Newport News							
Total Nonfarm	762.4	744.8	754.6	*764.6*	0.3%	11.1%	17.1%
Health Care & Social Assistance	87.0	89.8	88.8	*88.9*	2.2%	-3.9%	1.4%
Northern Virginia							
Total Nonfarm	1,378.9	1,358.9	1,373.5	*1,388.9*	0.7%	9.1%	14.3%
Health Care & Social Assistance	113.9	114.3	113.9	*113.4*	-0.4%	-3.1%	-5.1%
Richmond							
Total Nonfarm	636.9	638.7	645.4	*650.1*	2.1%	7.3%	9.1%
Health Care & Social Assistance	79.8	82.6	84.0	*84.0*	5.3%	7.0%	0.0%
Rest of Virginia							
Total Nonfarm	1,011.4	999.1	1,011.8	*1,000.2*	-1.1%	0.4%	-12.9%
Health Care & Social Assistance	127.9	127.1	127.3	*128.2*	0.2%	3.5%	8.8%

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

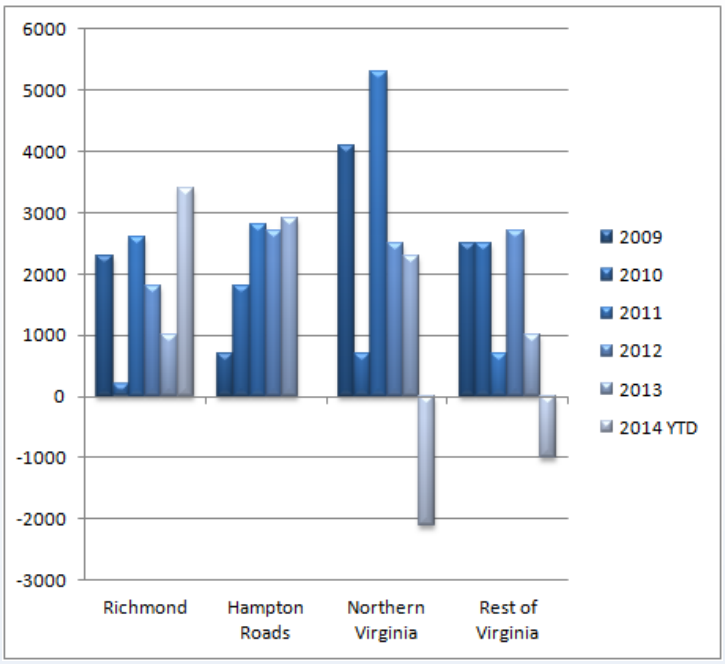


Figure 1: Annual Change in HC&SA Employment (Not Seasonally Adjusted, Change from Dec to Dec).

According to preliminary data released on July 18, 2014 by the U.S. Department of Labor, Bureau of Labor Statistics, Virginia's HC&SA sector added 500 jobs in June. Meanwhile, May's preliminary estimate for HC&SA employment was revised upward by 200 jobs. With this revision, Virginia's HC&SA sector added 300 jobs in May.

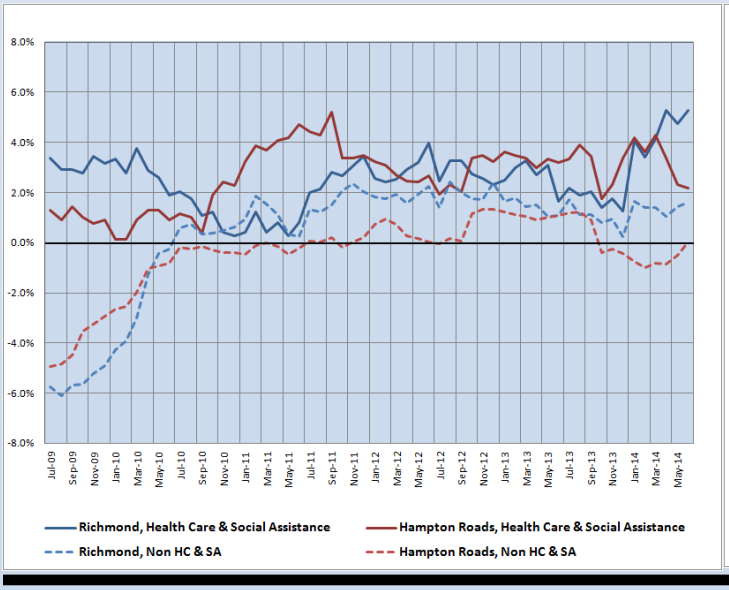
Despite the addition of 900 HC&SA jobs in the Rest of Virginia during the month of June, the region has still seen HC&SA employment decline by 1,000 during the first half of the year. Northern Virginia, which lost yet another 500 HC&SA jobs in June, has experienced an even more dramatic decline. So far in 2014, the region has lost 2,100 HC&SA jobs.

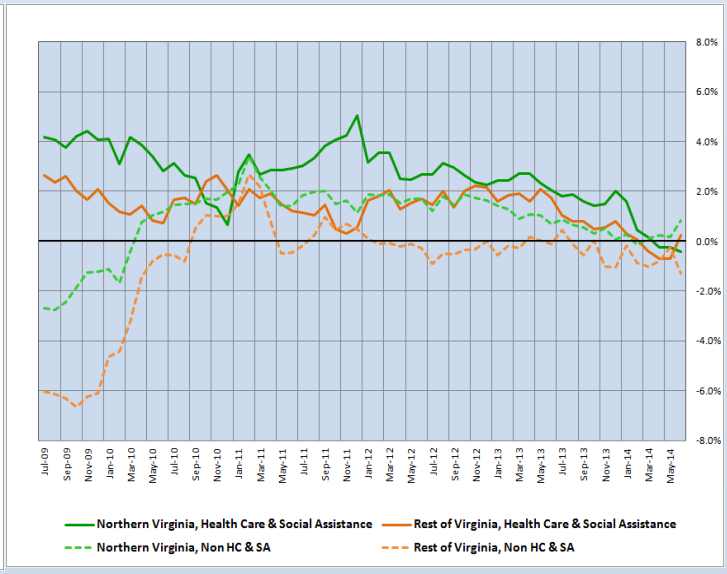
Only Richmond has been a net contributor to Virginia's HC&SA sector in 2014. In fact, Richmond has yet to experience a monthly decline in HC&SA employment, although the region failed to produce any new HC&SA jobs in June. Meanwhile, after adding 100 HC&SA jobs during the month, Hampton Roads has now broken even for the year, with no net change in year-to-date HC&SA employment.

Year-Over-Year Regional Employment Growth

Despite it lack of HC&SA job growth during the month, Richmond saw its year-over-year HC&SA employment growth rate increase from 4.7% in May to 5.3% in June, far eclipsing the other regions of the state. The next fastest-growing region of the state is Hampton Roads, which currently has a year-over-year HC&SA employment growth rate of 2.2%, although this growth rate has declined by nearly half since March. Meanwhile, Northern Virginia's year-over-year HC&SA employment growth rate declined further into negative territory, falling from -0.3% to -0.4%. However, the Rest of Virginia produced a positive HC&SA employment growth rate for the first time since February, increasing to 0.2% during the month.

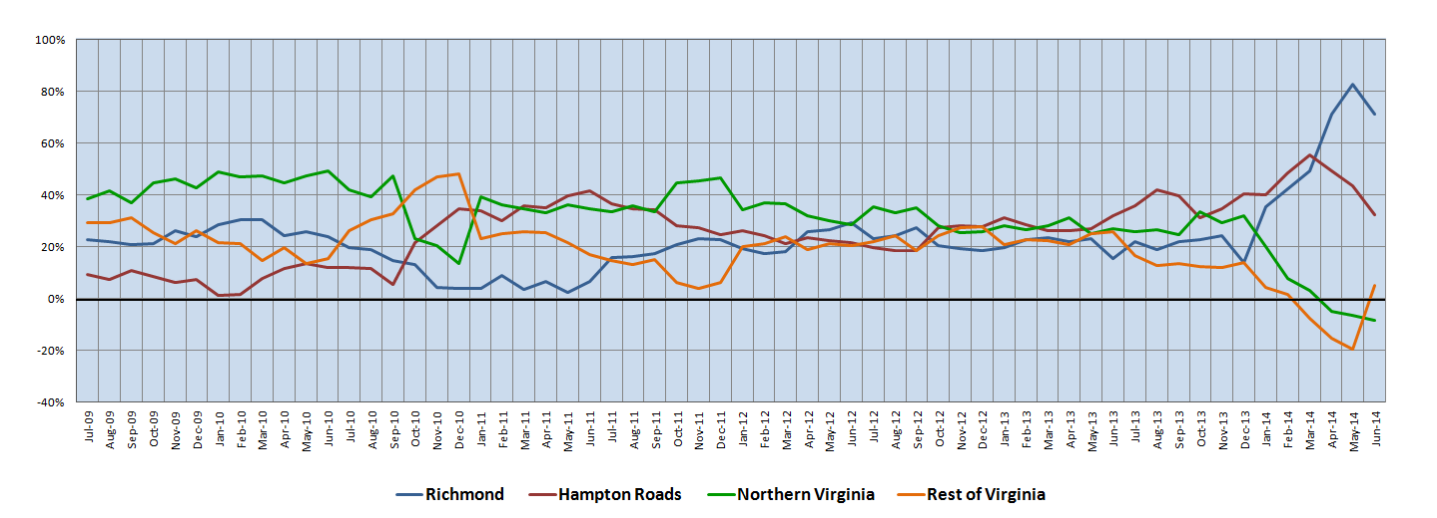
Figure 2: Year-Over-Year Employment Growth (Not Seasonally Adjusted).





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.



Thanks to its addition of 900 HC&SA jobs, the Rest of Virginia was the only region in the state to increase its 12-month HC&SA regional growth share in June. In fact, the Rest of Virginia's 12-month HC&SA regional growth share reached a six-month high of 5.1% during the month. In addition, June's results represent the first time in one year that the Rest of Virginia did not have the lowest regional growth share in the state. Instead, Northern Virginia, which has now sported a negative 12-month regional growth share for three consecutive months, now has the lowest share among Virginia's four regions. In June, Northern Virginia's 12-month HC&SA regional growth share fell from –6.5% to –8.5%, reaching its lowest value in more than a decade.

Subsector Employment Growth

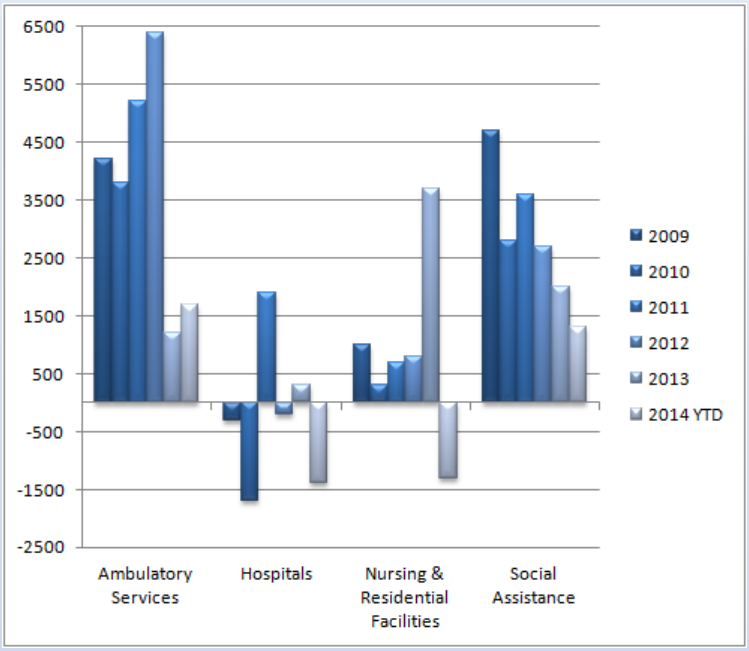


Figure 4: Annual & YTD Change in HC&SA Subsector Employment (Not Seasonally Adjusted, Dec. to Dec.)

HC&SA employment growth was driven by the Ambulatory Health Care Services subsector, which added 1,400 jobs in June. This represents the best month for the HC&SA subsector since last November, when 1,500 jobs were created in a single month. The only other HC&SA subsector that added jobs during the month was Nursing & Residential Care Facilities, which experienced a modest employment increase of 100 jobs. Meanwhile, 900 jobs were lost in the Social Assistance subsector, and the Hospitals subsector lost 100 jobs.

Through the first half of 2014, HC&SA employment growth has been driven by Ambulatory Health Care Services and Social Assistance. Ambulatory Health Care Services has added 1,700 jobs so far this year, already exceeding the 1,300 jobs the subsector created in all of 2013. Meanwhile, the Social Assistance subsector has added 1,300 jobs this year. However, most of these gains have been erased by the combined loss of 2,700 HC&SA jobs in Hospitals and Nursing & Residential Care Facilities.

Distribution of Growth by Subsector

Not Seasonally Adjusted	Employment, in Thousands				Growth Rate, Annualized		
	June 2013	Mar. 2014	May 2014	June 2014	12 Month	3 Month	1 Month
Virginia							
Health Care & Social Assistance	408.6	413.8	414.0	*414.5*	1.4%	0.7%	1.5%
Ambulatory Health Care Services	159.2	160.5	159.8	*161.2*	1.3%	1.8%	11.0%
Hospitals	109.0	109.4	108.4	*108.3*	-0.6%	-4.0%	-1.1%
Nursing & Residential Care Facilities	70.9	73.6	72.9	*73.0*	3.0%	-3.2%	1.7%
Social Assistance	69.5	70.3	72.9	*72.0*	3.6%	10.0%	-13.8%
Virginia Beach, Norfolk, Newport News							
Health Care & Social Assistance	87.0	89.8	88.8	*88.9*	2.2%	-3.9%	1.4%
Hospitals	22.8	22.9	22.7	*22.6*	-0.9%	-5.1%	-5.2%
Northern Virginia							
Health Care & Social Assistance	113.9	114.3	113.9	*113.4*	0.7%	9.1%	14.3%
Ambulatory Health Care Services	52.4	53.0	52.4	*52.3*	-0.2%	-5.2%	-2.3%
Hospitals	24.6	24.4	24.0	*23.6*	-4.1%	-12.5%	-18.3%

Preliminary estimates are italicized

Although Social Assistance lost 900 jobs in June, it is still the fastest growing HC&SA subsector in the state with respect to both its 3-month and 12-month annualized growth rates. With a 12-month employment growth rate of 3.6%, the Social Assistance subsector is growing at its fastest year-over-year rate since last September. Nursing & Residential Care Facilities has also been sporting a strong 12-month growth rate of 3.0%, but this growth rate has declined by nearly half since the beginning of the year. Meanwhile, the year-over-year growth rate in the Ambulatory Health Care Services subsector rebounded strongly from 0.5% in May to 1.4% in June, but its growth rate is still down from the beginning of the year.

Employment by Subsector

Strong growth in other subsectors has reduced the Hospital subsector's significance as an employer in the HC&SA industry over the last decade. A decade ago, Hospitals accounted for about 32% of HC&SA jobs. With this year's job losses, that share has dropped to 26%. This is a marked shift in makeup of the health care and social assistance sector, with both jobs and employment share accruing in the Ambulatory Services and Social Assistance subsectors. The Social Assistance subsector has seen the most rapid growth. Since 2002 it has added 33,500 jobs, almost doubling its number of employees. The Ambulatory Services subsector has grown more slowly, but as the largest subsector its growth has had a larger impact, adding just shy of 85,000 jobs since 2002. By contrast, Hospitals & Nursing & Residential Care Facilities combined have added only 28,500 jobs since 2002. Hospitals have added only 12,600 jobs—the least of any subsector—despite almost matching ambulatory services in scale in 2002.

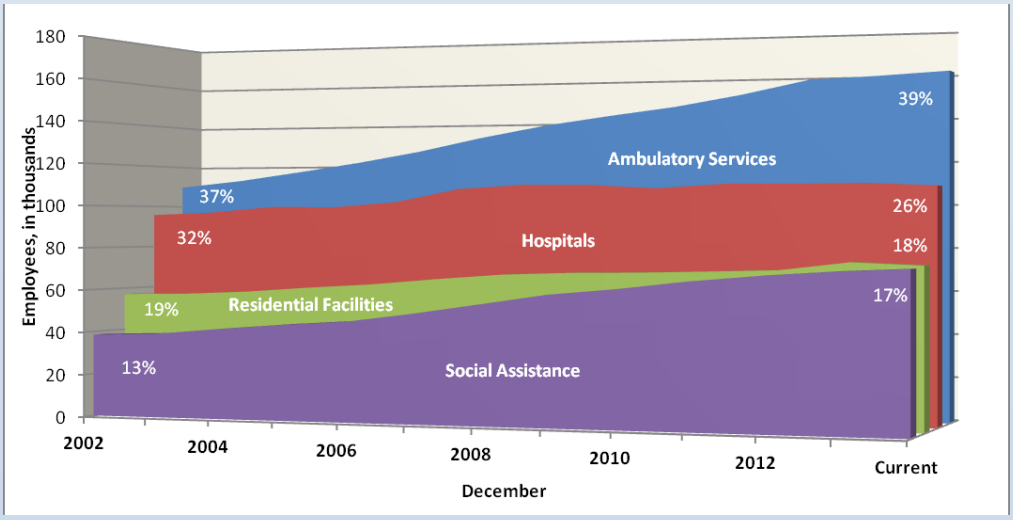
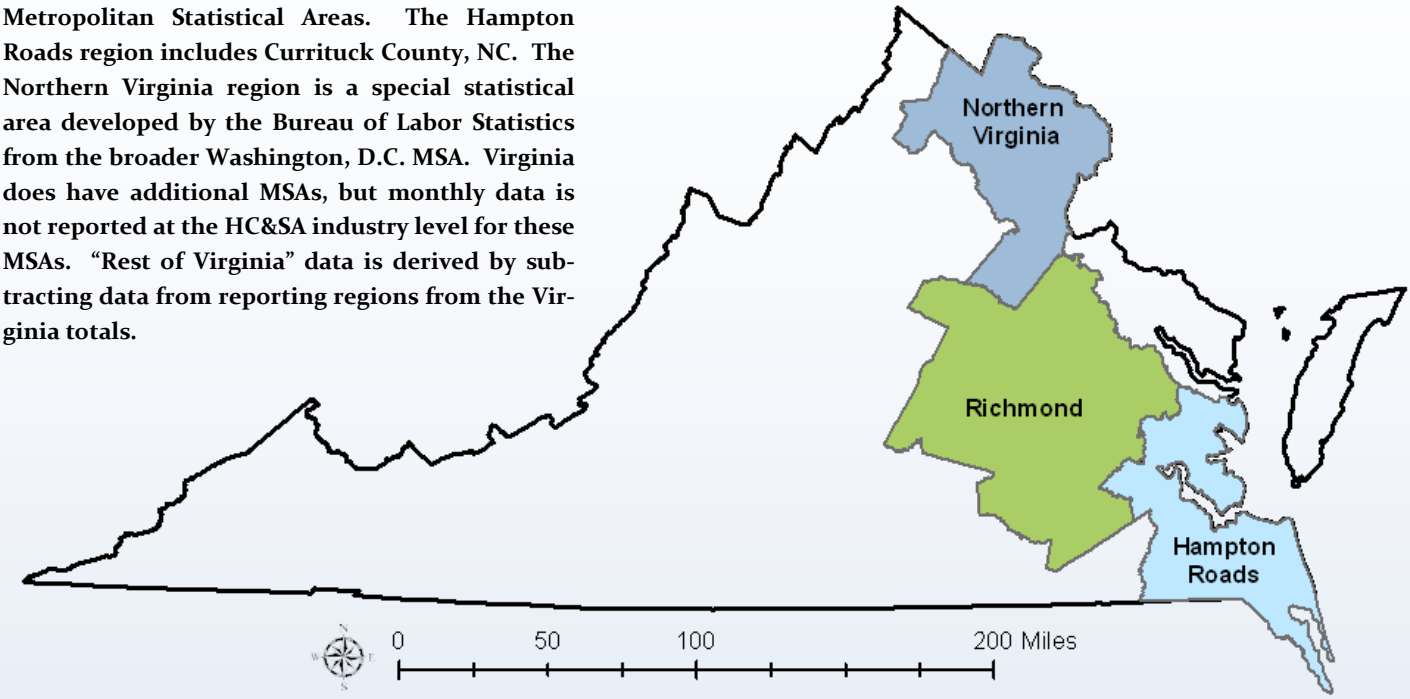


Figure 5: Employment in Virginia's HC&SA Subsectors (Not Seasonally Adjusted).

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

Northern VA, (Non-standard CES Area 94783)

Counties:	Cities
Arlington	Alexandria
Clarke	Fairfax
Fairfax	Falls Church
Fauquier	Fredericksburg
Loudoun	Manassas
Prince William	Manassas Park
Spotsylvania	
Stafford	
Warren	

Richmond

Richmond, VA (MSA 40060)

Counties:	Cities
Amelia	Colonial Heights
Caroline	Hopewell
Charles City	Petersburg
Chesterfield	Richmond
Cumberland	
Dinwiddie	
Goochland	
Hanover	
Henrico	
King & Queen	
King William	
Louisa	
New Kent	
Powhatan	
Prince George	
Sussex	

Hampton Roads

Virginia Beach-Norfolk-Newport News, VA-NC (MSA 47260)

Counties:	Cities
Gloucester	Chesapeake
Isle of Wight	Hampton
James City	Newport News
Mathews	Norfolk
Surry	Poquoson
York	Portsmouth
	Suffolk
Currituck, NC	Virginia Beach
	Williamsburg

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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)

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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).