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 26 March 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.
- According to preliminary estimates, Virginia's Health Care & Social Assistance (HC&SA) sector lost 1,900 jobs in February. January's preliminary estimate for HC&SA employment was revised upward by 300 jobs, but the sector has still lost 3,700 jobs through the first two months of 2014.
- All three of Virginia's major metropolitan areas lost HC&SA jobs in February. Job losses were most severe in Northern Virginia, where HC&SA employment fell by 1,700 jobs. In addition, Hampton Roads lost 500 HC&SA jobs, while Richmond managed to lose only 100 HC&SA jobs during the month.
- Every HC&SA subsector lost jobs in February. Nursing & Residential Care Facilities suffered the worst decline, with employment falling by 800 jobs. Meanwhile, Ambulatory Health Care Services and Hospitals each lost 400 jobs. The Social Assistance subsector had the best relative performance, but it still lost 300 jobs in February.

Data in Brief

Not Seasonally Adjusted*	Employment, in Thousands				Growth Rate, Annualized		
	Feb. 2013	Nov. 2013	Jan. 2014	Feb. 2014	12 Month	3 Month	1 Month
Virginia							
Total Nonfarm	3,719.4	3,797.0	3,715.0	*3,714.9*	-0.1%	-8.4%	0.0%
Health Care & Social Assistance	405.0	412.2	412.4	*410.5*	1.4%	-1.6%	-5.4%
Virginia Beach, Norfolk, Newport News							
Total Nonfarm	740.5	754.2	736.8	*738.2*	-0.3%	-8.2%	2.3%
Health Care & Social Assistance	85.9	88.0	89.3	*88.8*	3.4%	3.7%	-6.5%
Northern Virginia							
Total Nonfarm	1,353.1	1,384.4	1,356.8	*1,349.7*	-0.3%	-9.7%	-6.1%
Health Care & Social Assistance	113.3	114.5	114.8	*113.1*	-0.2%	-4.8%	-16.4%
Richmond							
Total Nonfarm	623.4	641.3	632.7	*632.7*	1.5%	-5.3%	0.0%
Health Care & Social Assistance	78.9	80.9	81.6	*81.5*	3.3%	3.0%	-1.5%
Rest of Virginia							
Total Nonfarm	1,002.4	1,017.1	988.7	*994.3*	-0.8%	-8.7%	7.0%
Health Care & Social Assistance	126.9	128.8	126.7	*127.1*	0.2%	-5.2%	3.9%

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

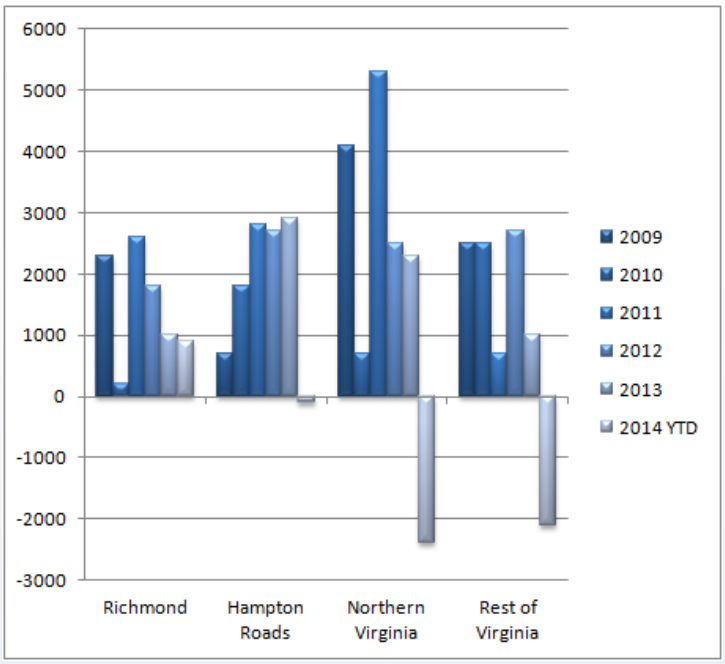


Figure 1: Annual Change in HC&SA Employment (Not Seasonally Adjusted, Change from Dec to Dec).

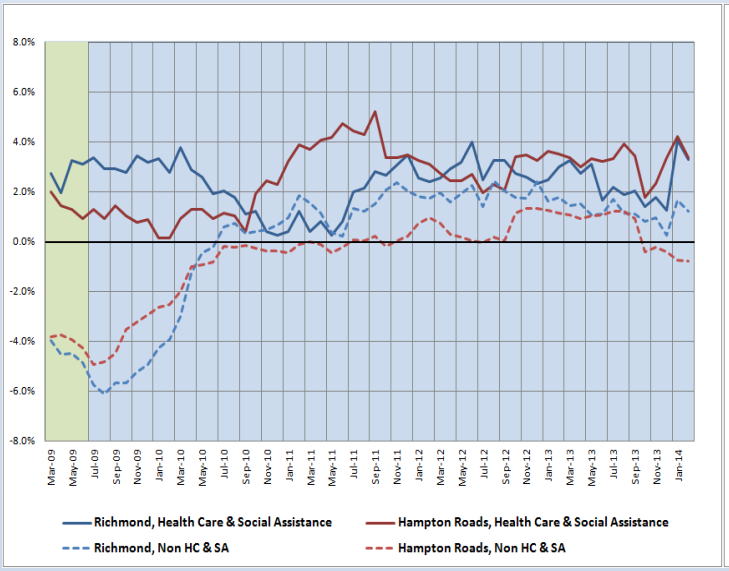
According to preliminary data released on March 28, 2014 by the U.S. Department of Labor, Bureau of Labor Statistics, Virginia's HC&SA sector lost 1,900 jobs in February. Meanwhile, January's preliminary estimate for HC&SA employment was revised upward by 300 jobs. Even with the upward revision, however, the sector still lost 1,800 jobs in January. These results represent the worst two-month start to a new year since 2010, when 6,200 HC&SA jobs were lost during the first two months of the year.

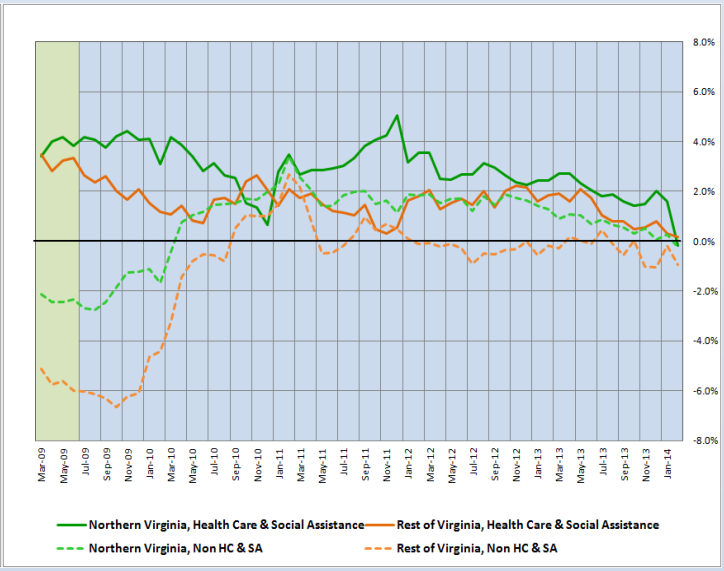
So far in 2014, Richmond is the only region in Virginia that has experienced HC&SA employment gains, although Hampton Roads is close to positive territory with a loss of just 100 HC&SA jobs. However, Northern Virginia and the Rest of Virginia have both wiped out more than all of their full-year employment gains from 2013 in just the first two months of this year. Northern Virginia has seen HC&SA employment drop by 2,400 jobs, while the Rest of Virginia has lost 2,100 HC&SA jobs through February. Combined, these two regions added 3,300 HC&SA jobs in 2013.

Year-Over-Year Regional Employment Growth

Although Hampton Roads saw its year-over-year HC&SA employment growth rate drop from 4.2% to 3.4% in February, the region retained its status as the fastest-growing region in Virginia with respect to health care employment. However, Richmond is not far behind Hampton Roads with a year-over year HC&SA employment growth rate of 3.3%. The other two regions in the state, Northern Virginia and the Rest of Virginia, have seen year-over-year HC&SA employment growth stagnate in recent months. Northern Virginia's year-over-year HC&SA employment growth rate went negative for the first time since April 2004, while the Rest of Virginia saw its year-over-year growth rate remain barely positive at just 0.2%

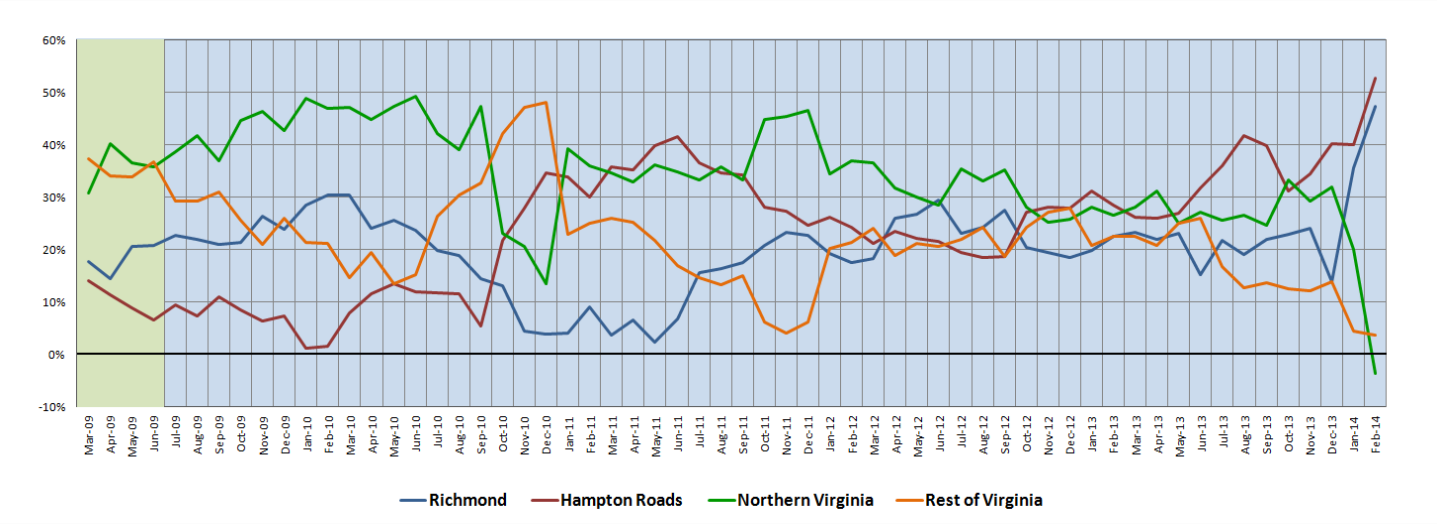
Figure 2: Year-Over-Year Employment Growth (Not Seasonally Adjusted).





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.



Essentially all HC&SA employment growth over the past 12 months has come from either Hampton Roads or Richmond. Currently, Hampton Roads' 12-month regional HC&SA employment growth share is 52.7%, while Richmond's respective share is 47.3%. Meanwhile, the share of HC&SA employment growth over the previous 12-months that is attributable to the Rest of Virginia is just 3.6%, which is completely negated by the –3.6% share for Northern Virginia. Although every region in Virginia saw its year-over-year HC&SA employment growth rate fall in February, Hampton Roads and Richmond managed to increase their 12-month HC&SA employment growth share during the month. However, despite adding 400 HC&SA jobs in February, the Rest of Virginia still saw its respective growth share decline from 4.4% in January.

Subsector Employment Growth

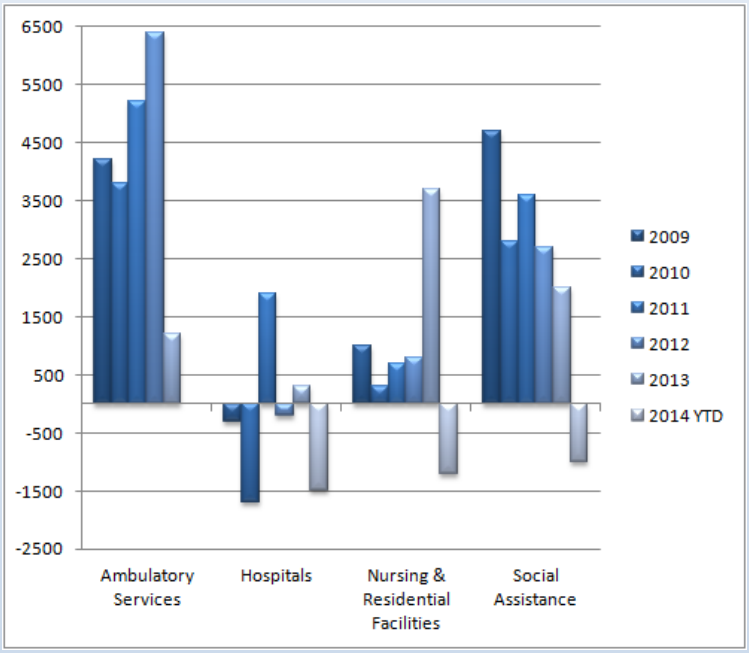


Figure 4: Annual & YTD Change in HC&SA Subsector Employment (Not Seasonally Adjusted, Dec. to Dec.)

Every HC&SA subsector lost jobs in February. By level change, the negative effects were strongest in Nursing & Residential Care Facilities, where employment decreased by 800 jobs. Although this represents a one-month annualized growth rate of –12.2%, Nursing & Residential Care Facilities is still the fastest-growing subsector in terms of HC&SA employment over the previous 12 months. Meanwhile, the Hospitals and Ambulatory Health Care Services subsectors each lost 400 jobs, while Social Assistance saw employment fall by 300 jobs.

Through the first two months of 2014, no subsector has gained jobs in Virginia's HC&SA sector. Ambulatory Health Care Services, which has produced the most HC&SA employment gains in three of the past four years, has broken even so far this year. However, each of the three other HC&SA subsectors have lost at least 1,000 jobs through February. These losses have been most pronounced in the Hospitals subsector, where employment has fallen by 1,500 jobs in the past two months.

Distribution of Growth by Subsector

Not Seasonally Adjusted	Employment, in Thousands				Growth Rate, Annualized		
	Feb. 2013	Nov. 2013	Jan. 2013	Feb. 2014	12 Month	3 Month	1 Month
Virginia							
Health Care & Social Assistance	405.0	412.2	412.4	*410.5*	1.4%	-1.6%	-5.4%
Ambulatory Health Care Services	157.2	160.3	159.9	*159.5*	1.5%	-2.0%	-3.0%
Hospitals	109.0	109.1	108.6	*108.2*	-0.7%	-3.3%	-4.3%
Nursing & Residential Care Facilities	70.2	72.4	73.9	*73.1*	4.1%	3.9%	-12.2%
Social Assistance	68.6	70.4	70.0	*69.7*	1.6%	-3.9%	-5.0%
Virginia Beach, Norfolk, Newport News							
Health Care & Social Assistance	85.9	88.0	89.3	*88.8*	3.4%	3.7%	-6.5%
Hospitals	22.3	23.1	23.2	*23.0*	3.1%	-1.7%	-9.9%
Northern Virginia							
Health Care & Social Assistance	113.3	114.5	114.8	*113.1*	-0.2%	-4.8%	-16.4%
Ambulatory Health Care Services	51.5	52.9	53.4	*52.6*	2.1%	-2.2%	-16.6%
Hospitals	25.2	24.2	24.0	*23.9*	-5.2%	-4.9%	-4.9%

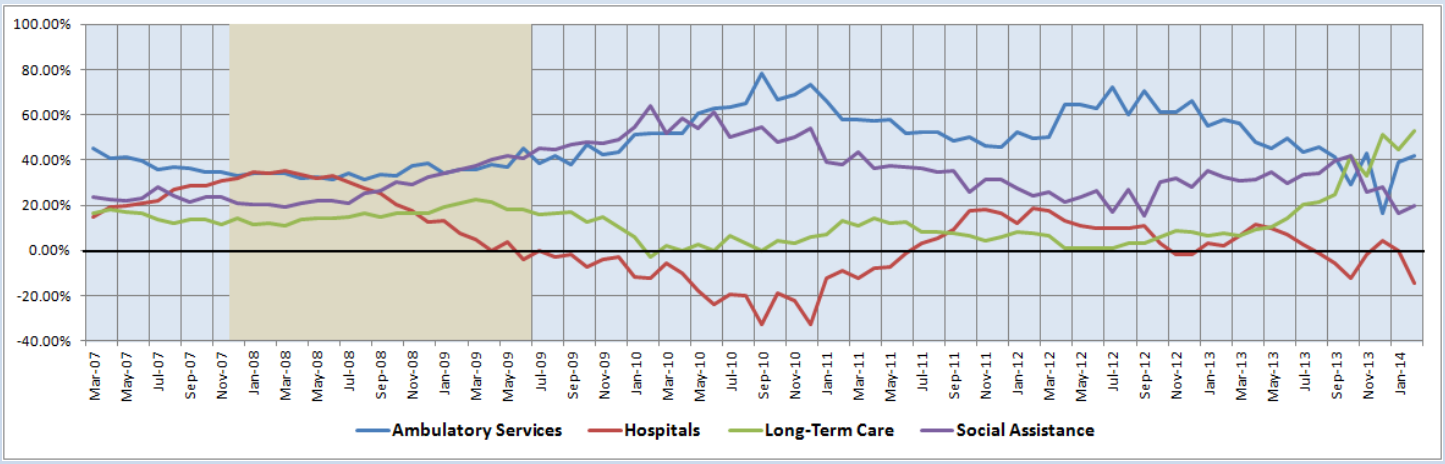
Preliminary estimates are italicized

Although employment growth in the HC&SA sector has been lackluster over the past several months, the employment picture looks somewhat more promising when viewed over a longer time frame. Nursing & Residential Care Facilities currently has a 12-month growth rate of 4.1%, while Social Assistance and Ambulatory Health Care Services are both growing at an approximately 1.5% annual rate. All of these growth rates are above the 1.4% 12-month growth rate for the overall HC&SA sector. However, employment in the Hospitals subsector continues to decline, with a 12-month employment growth rate of –0.7%.

Share of 12-Month Growth by Subsector

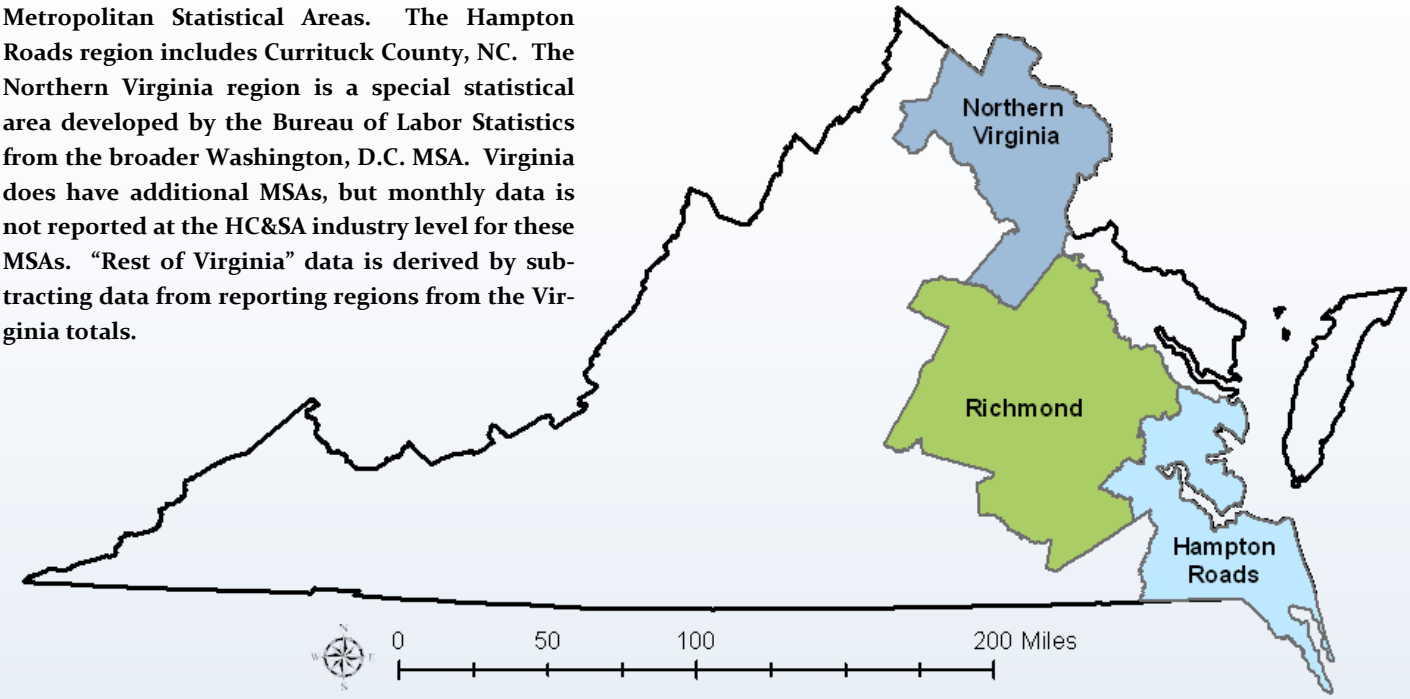
Three of the four HC&SA subsectors managed to increase their 12-month employment growth share in February. Nursing & Residential Care Facilities increased its 12-month employment growth share from 44.4% to 52.7%, reaching its highest share in more than a decade. Meanwhile, Ambulatory Health Care Services increased its share from 38.9% to 41.8%, while Social Assistance's share increased from 16.7% to 20.0%. These increases came at the expense of the Hospitals subsector, which saw its 12-month HC&SA employment growth share fall from 0.0% to –14.6% during the month. This represents the lowest 12-month HC&SA employment growth share for the subsector in more than three years.

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

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)

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).