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 32 September 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.
- Richmond's Health Care & Social Assistance (HC&SA) sector had its strongest month of employment gains in more than a decade, adding 3,000 jobs to the state's economy. This represents a one-month annualized growth rate of more than 50%. Meanwhile, the other three regions of Virginia all lost HC&SA jobs in August.
- Three of Virginia's four HC&SA subsectors added jobs in August. Ambulatory Health Care Services was the best performer with an increase of 1,200 jobs, while Nursing & Residential Care Facilities and Social Assistance each gained 400 new jobs during the month. Only the Hospitals subsector failed to add HC&SA jobs in August.
- With 6,500 year-to-date jobs added, Richmond's HC&SA sector has now created more jobs in the first eight months of 2014 than in the past four years combined. Meanwhile, year-to-date HC&SA subsector growth remains concentrated in Ambulatory Health Care Services, which has added 4,600 jobs so far this year.

Data in Brief

Not Seasonally Adjusted*	Employment, in Thousands				Growth Rate, Annualized		
	Aug. 2013	May 2014	July 2014	Aug. 2014	12 Month	3 Month	1 Month
Virginia							
Total Nonfarm	3,768	3,785.3	3,794.4	*3,783.6*	0.4%	-0.2%	-3.4%
Health Care & Social Assistance	411.0	414.0	414.5	*416.3*	1.3%	2.2%	5.3%
Virginia Beach, Norfolk, Newport News							
Total Nonfarm	762.3	754.6	763.8	*762.0*	0.0%	4.0%	-2.8%
Health Care & Social Assistance	87.7	88.8	88.4	*88.3*	0.7%	-2.2%	-1.3%
Northern Virginia							
Total Nonfarm	1,370.7	1,373.5	1,383.5	*1,376.6*	0.4%	0.9%	-5.8%
Health Care & Social Assistance	114.4	113.9	113.2	*112.9*	-1.3%	-3.5%	-3.1%
Richmond							
Total Nonfarm	633.6	645.4	646.8	*645.1*	1.8%	-0.2%	-3.1%
Health Care & Social Assistance	80.7	84.0	84.1	*87.1*	7.9%	15.6%	52.3%
Rest of Virginia							
Total Nonfarm	1,001.4	1,011.8	1,000.3	*999.9*	-0.1%	-4.6%	-0.5%
Health Care & Social Assistance	128.2	127.3	128.8	*128.0*	-0.2%	2.2%	-7.2%

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

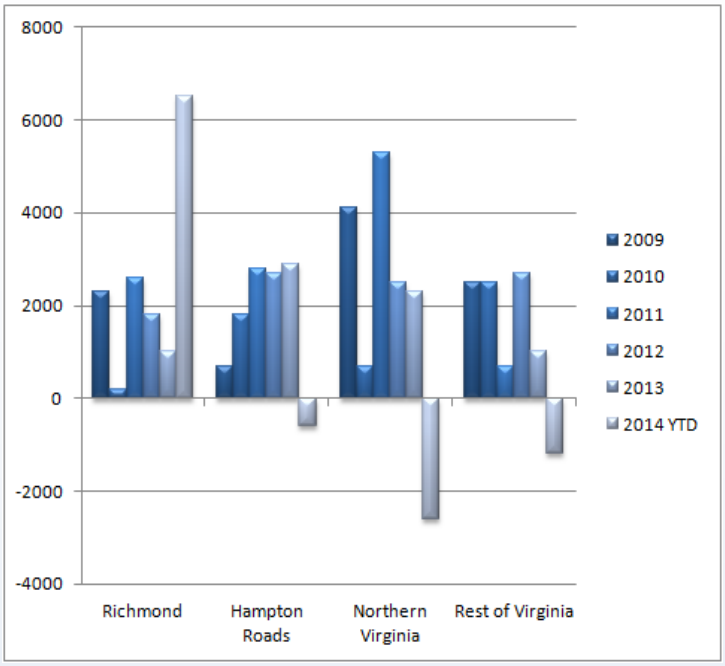


Figure 1: Annual Change in HC&SA Employment (Not Seasonally Adjusted, Change from Dec to Dec).

According to preliminary data released on September 19, 2014 by the U.S. Department of Labor, Bureau of Labor Statistics, Virginia's HC&SA sector created 1,800 jobs in August. Meanwhile, July's preliminary estimate for HC&SA employment was revised downward by 100 jobs. After this revision, Virginia's HC&SA sector lost 400 jobs in July.

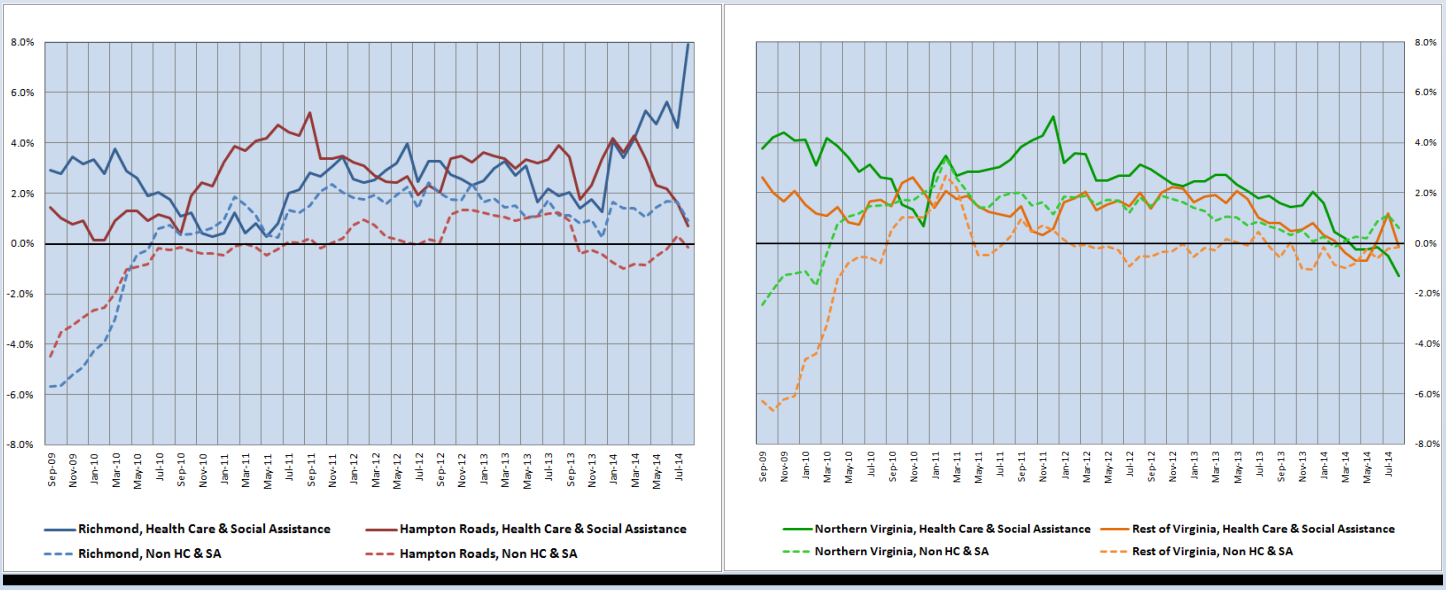
Richmond continued its tremendous year-to-date employment growth in the HC&SA sector with the addition of 3,000 new jobs in August, which represents the best monthly performance of any region in the state in more than a decade. Meanwhile, the other three regions in the state all lost HC&SA jobs in August. The Rest of Virginia was the weakest performer with the loss of 800 HC&SA jobs, while Northern Virginia and Hampton Roads combined to lose 400 HC&SA jobs during the month.

The year-to-date totals display a similar trend. Richmond has created 6,500 HC&SA jobs so far this year, while the other three regions of the state have still failed to produce any new jobs in the HC&SA sector in 2014.

Year-Over-Year Regional Employment Growth

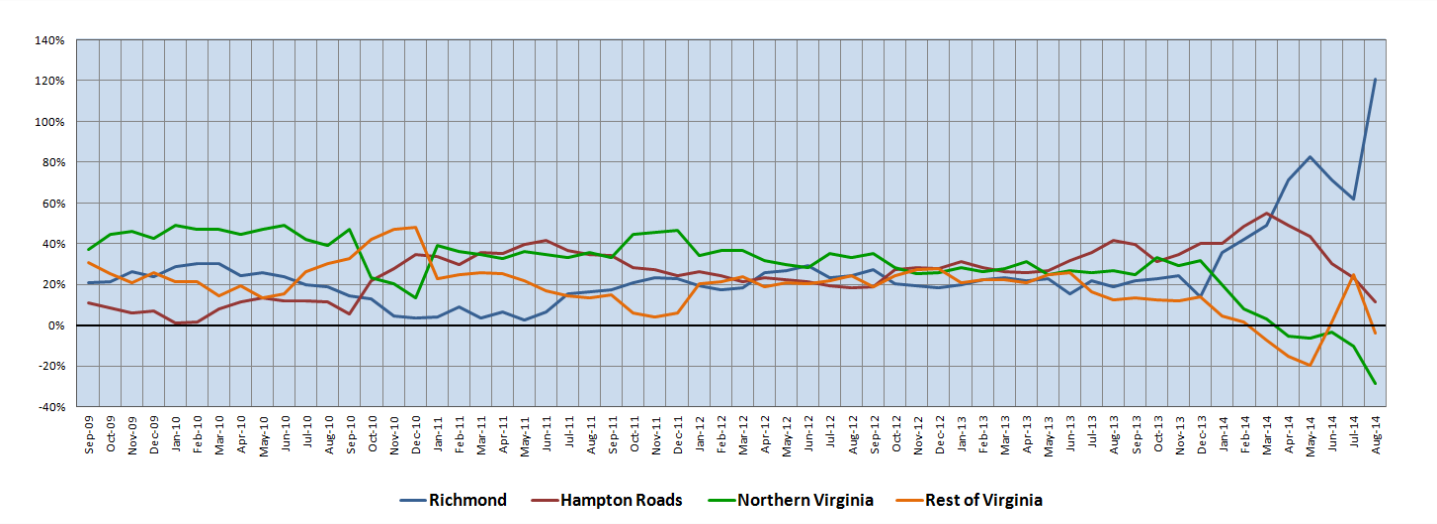
Given its impressive job growth in August, Richmond's HC&SA sector saw a spike in its year-over-year employment growth rate from 4.6% to 7.9% during the month. This represents the highest value for Richmond's year-over-year employment growth rate in its HC&SA sector since September 2008. Meanwhile, the other three regions of the state are showing little to no year-over-year HC&SA job growth. Hampton Roads experienced a drop in its year-over-year HC&SA employment growth rate from 1.6% to 0.7% during the month, while both Northern Virginia and the Rest of Virginia currently sport negative year-over-year HC&SA employment growth rates.

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.



After nearly doubling during the month, Richmond's 12-month HC&SA regional growth share now exceeds 100%. The only other region in Virginia that currently enjoys a positive 12-month HC&SA regional growth share is Hampton Roads, although its growth share fell from 23.3% in July to just 11.3% in August. Northern Virginia has experienced a precipitous drop in its 12-month HC&SA regional growth share throughout 2014. At the beginning of the year, Northern Virginia' regional growth share was 20%, but it has now fallen all the way to –28.3%, which represents the fifth consecutive month in which its growth share has been in negative territory. Meanwhile, the Rest of Virginia saw its 12-month HC&SA regional growth share dip back into negative territory in August after reaching a year-to-date high of 25% in July.

Subsector Employment Growth

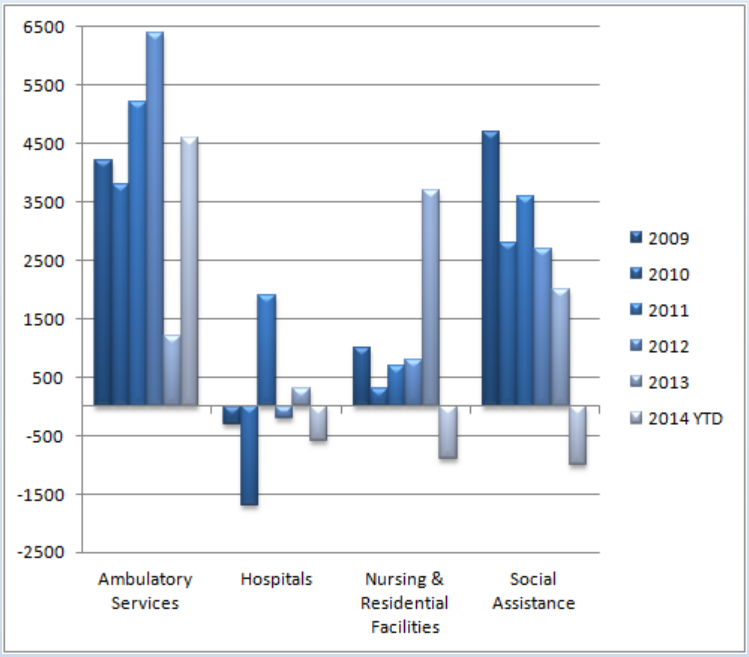


Figure 4: Annual & YTD Change in HC&SA Subsector Employment (Not Seasonally Adjusted, Dec. to Dec.)

For the third consecutive month, the Ambulatory Health Care Services subsector created more than 1,000 new jobs. In August, Ambulatory Health Care Services saw HC&SA employment increase by 1,200, and this subsector has created 4,300 jobs in just the past three months. Ambulatory Health Care Services remains the only HC&SA subsector that has positive year-to-date employment growth.

The Nursing & Residential Care Facilities and Social Assistance subsectors each added 400 new jobs in August. However, through the first eight months of 2014, both of these HC&SA subsectors have still not created any new jobs. Year-to-date, Social Assistance has lost 1,000 jobs, while Nursing & Residential Care Facilities has seen employment decline by 900.

Hospitals were the only HC&SA subsector that failed to produce any jobs in August, although the decline was a relatively modest 200 jobs. Year-to-date, the Hospitals subsector has lost 600 jobs, which still makes it the second-best relative performer so far this year.

Distribution of Growth by Subsector

Not Seasonally Adjusted	Employment, in Thousands				Growth Rate, Annualized		
	Aug. 2013	May 2014	July 2014	Aug. 2014	12 Month	3 Month	1 Month
Virginia							
Health Care & Social Assistance	411.0	414.0	414.5	*416.3*	1.3%	2.2%	5.3%
Ambulatory Health Care Services	160.2	159.8	162.9	*164.1*	2.4%	11.2%	9.2%
Hospitals	109.3	108.4	109.3	*109.1*	-0.2%	2.6%	-2.2%
Nursing & Residential Care Facilities	71.7	72.9	73.0	*73.4*	2.4%	2.8%	6.8%
Social Assistance	69.8	72.9	69.3	*69.7*	-0.1%	-16.4%	7.2%
Virginia Beach, Norfolk, Newport News							
Health Care & Social Assistance	87.7	88.8	88.4	*88.3*	0.7%	-2.2%	-1.3%
Hospitals	23.1	22.7	22.6	*22.5*	-2.6%	-3.5%	-5.2%
Northern Virginia							
Health Care & Social Assistance	114.4	113.9	113.2	*112.9*	-1.3%	-3.5%	-3.1%
Ambulatory Health Care Services	52.7	52.4	53.2	*53.5*	1.5%	8.7%	7.0%
Hospitals	24.6	24.0	23.6	*23.5*	-4.5%	-8.1%	-5.0%

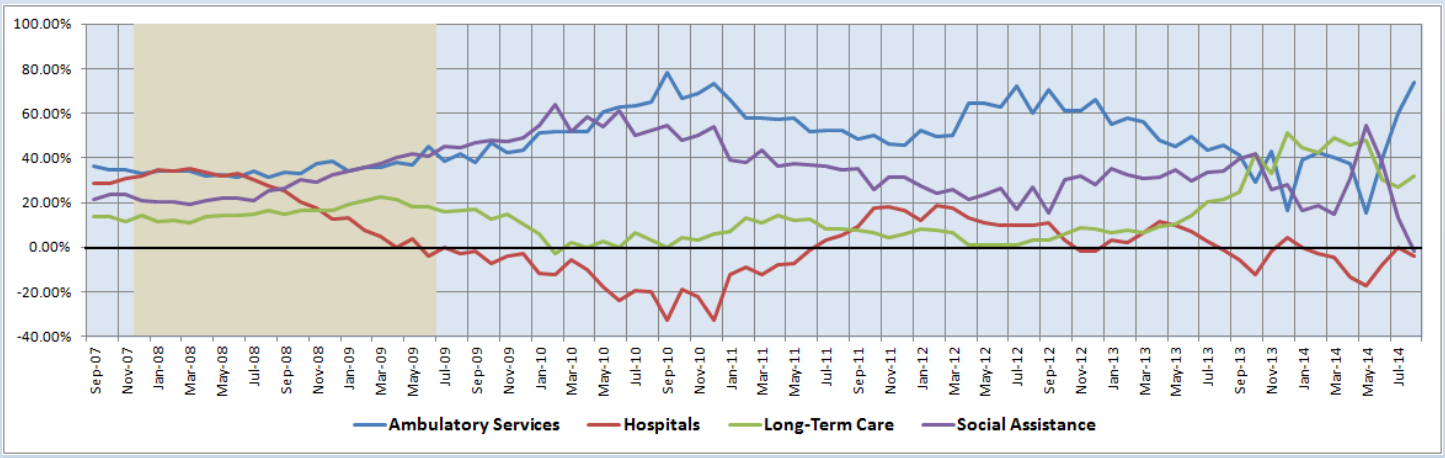
Preliminary estimates are italicized

Both Ambulatory Health Care Services and Nursing & Residential Care Facilities currently have 12-month annualized employment growth rates of 2.4%, and their more recent performance is even more impressive. Over the past three months, Ambulatory Health Care Services has grown at a 11.2% annualized rate, while Nursing & Residential Care Facilities enjoyed a one-month annualized growth rate of 6.8% in August. On the other hand, the Hospitals and Social Assistance subsectors have experienced no employment growth over the past year. However, the Hospitals subsector does currently sport a three -month annualized growth rate of 2.6%, while Social Assistance grew at an annualized rate of 7.2% in August.

Share of 12-Month Growth by Subsector

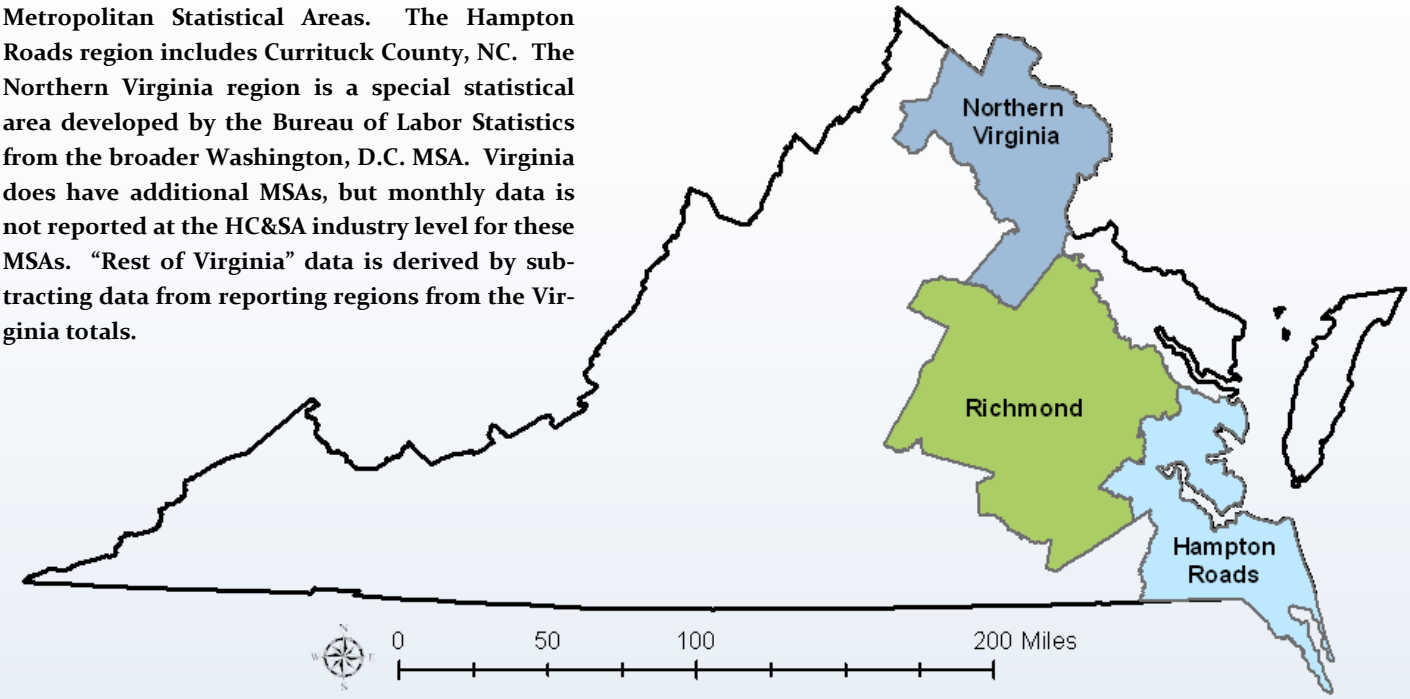
Over the past four months, Ambulatory Health Care Services has seen a dramatic increase in its 12-month HC&SA subsector employment growth share. Back in May, its growth share reached a multi-year low of 15.2%, but this value increased to 73.6% in August. Much of this share growth has come at the expense of the Social Assistance subsector, which has seen its 12-month employment growth share decline over the past four months from 54.4% in May to –1.9% in August. Meanwhile, Nursing & Residential Care Facilities increased its 12-month HC&SA subsector employment growth share in August to 32.1%, but Hospitals saw its growth share fall back into negative territory at –3.8% 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

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).