



Virginia Healthcare Workforce Briefs

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

Series 2, Issue 37

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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. In addition, employment estimates going back to April 2013 have been revised using new 2014 benchmarks.
- ◆ Virginia's Health Care & Social Assistance (HC&SA) sector began 2015 on a sour note as employment fell by 1,200 in January. Although Richmond did lose 400 HC&SA jobs in January, most of the job losses occurred in Northern Virginia, where HC&SA employment fell by 1,400 during the month.
- ◆ Despite January's employment losses, there were some small HC&SA job gains in Hampton Roads and the Rest of Virginia. The Rest of Virginia was the biggest gainer in the month with 400 new HC&SA jobs, while Hampton Roads contributed 200 jobs.
- ◆ Hospitals and Ambulatory Health Care Services both suffered significant employment losses in January. Combined, these two HC&SA subsectors lost 3,100 jobs during the month. However, Social Assistance bucked the general trend by adding 1,400 jobs in January, while Nursing & Residential Care Facilities created 500 HC&SA jobs.

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.

Data in Brief

Not Seasonally Adjusted*	Employment, in Thousands				Growth Rate, Annualized		
	Jan. 2014	Oct. 2014	Dec. 2014	Jan. 2015	12 Month	3 Month	1 Month
Virginia							
Total Nonfarm	3,706	3,797.4	3,817.2	3,739.3	0.9%	-6.0%	-21.9%
Health Care & Social Assistance	404.1	410.0	412.6	411.4	1.8%	1.4%	-3.4%
Virginia Beach, Norfolk, Newport News							
Total Nonfarm	737.9	753.2	758.4	744.1	0.8%	-4.7%	-20.4%
Health Care & Social Assistance	86.9	86.6	86.5	86.7	-0.2%	0.5%	2.8%
Northern Virginia							
Total Nonfarm	1,359.8	1,383.4	1,395.3	1,370.9	0.8%	-3.6%	-19.1%
Health Care & Social Assistance	115.5	118.8	120.1	118.7	2.8%	0.7%	-13.1%
Richmond							
Total Nonfarm	619.0	635.4	643.1	627.7	1.4%	-4.8%	-25.2%
Health Care & Social Assistance	79.1	81.1	80.3	79.9	1.0%	-5.8%	-5.8%
Rest of Virginia							
Total Nonfarm	989.9	1,025.4	1,020.4	996.6	0.7%	-10.8%	-24.7%
Health Care & Social Assistance	112.6	123.8	125.7	126.1	2.9%	7.6%	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

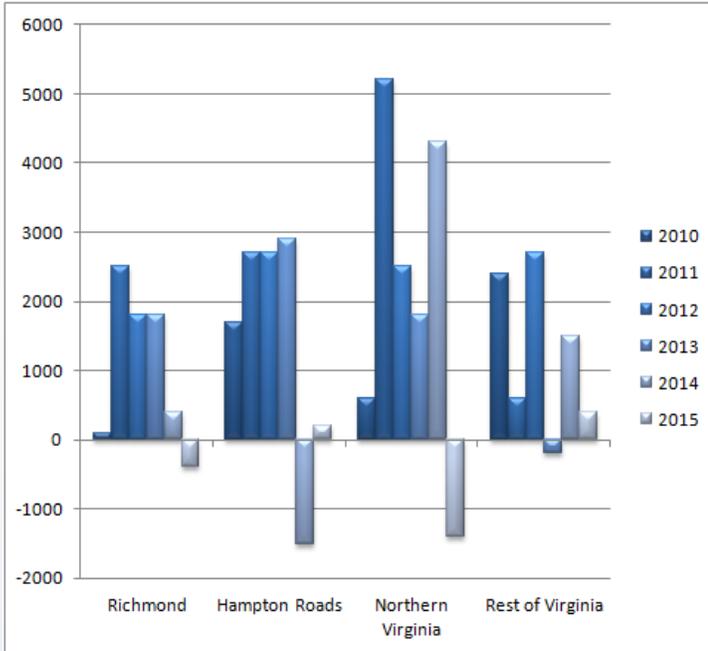


Figure 1: Annual Change in HC&SA Employment (Not Seasonally Adjusted, Change from Dec to Dec).

According to preliminary data released on March 17, 2015 by the U.S. Department of Labor, Bureau of Labor Statistics, Virginia’s HC&SA sector lost 1,200 jobs in January. Northern Virginia’s HC&SA sector was the hardest hit during the month as the region lost 1,400 HC&SA jobs in January, while Richmond saw its employment in the sector fall by a relatively modest 400 jobs.

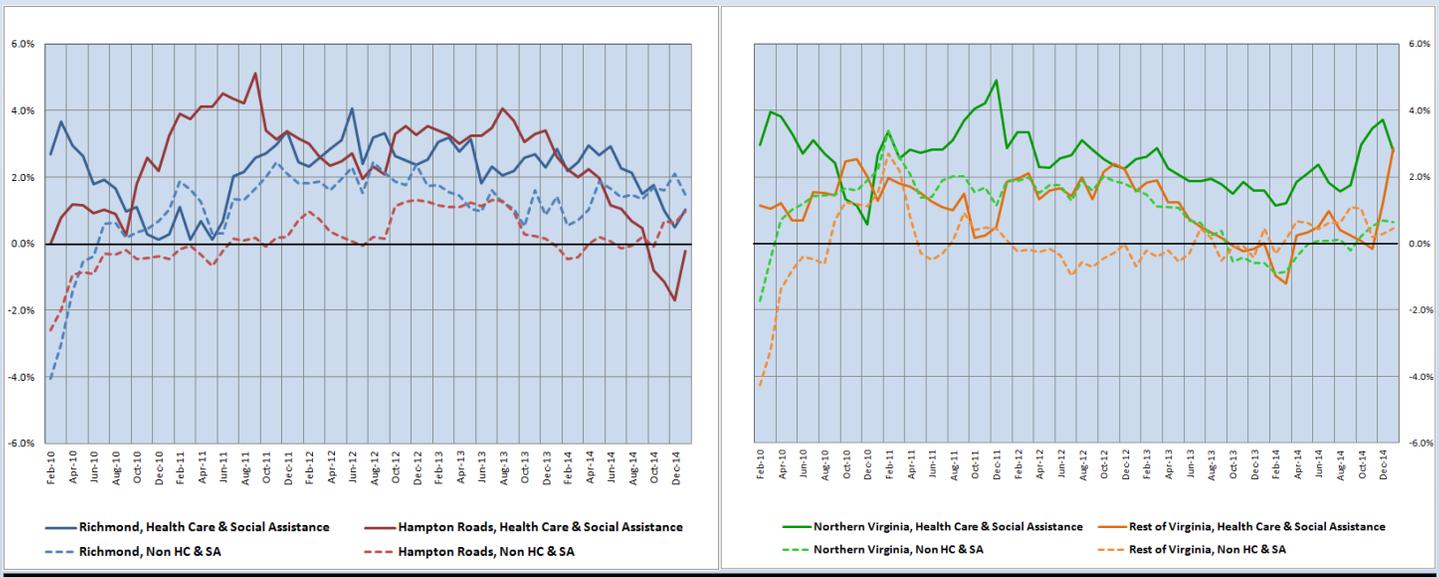
Despite the overall job losses, there were some small employment gains in Hampton Roads and the Rest of Virginia in January. The Rest of Virginia was the biggest gainer with an increase of 400 HC&SA jobs, while Hampton Roads created 200 new HC&SA jobs during the month.

The annual benchmark revisions made by the Bureau of Labor Statistics had a significant impact on Richmond’s HC&SA employment estimates for 2014. It had previously been estimated that Virginia’s HC&SA sector created 5,600 jobs in 2014, but this total fell to just 400 after the revisions. Alternatively, Northern Virginia and the Rest of Virginia saw large upward revisions of their full-year 2014 totals.

Year-Over-Year Regional Employment Growth

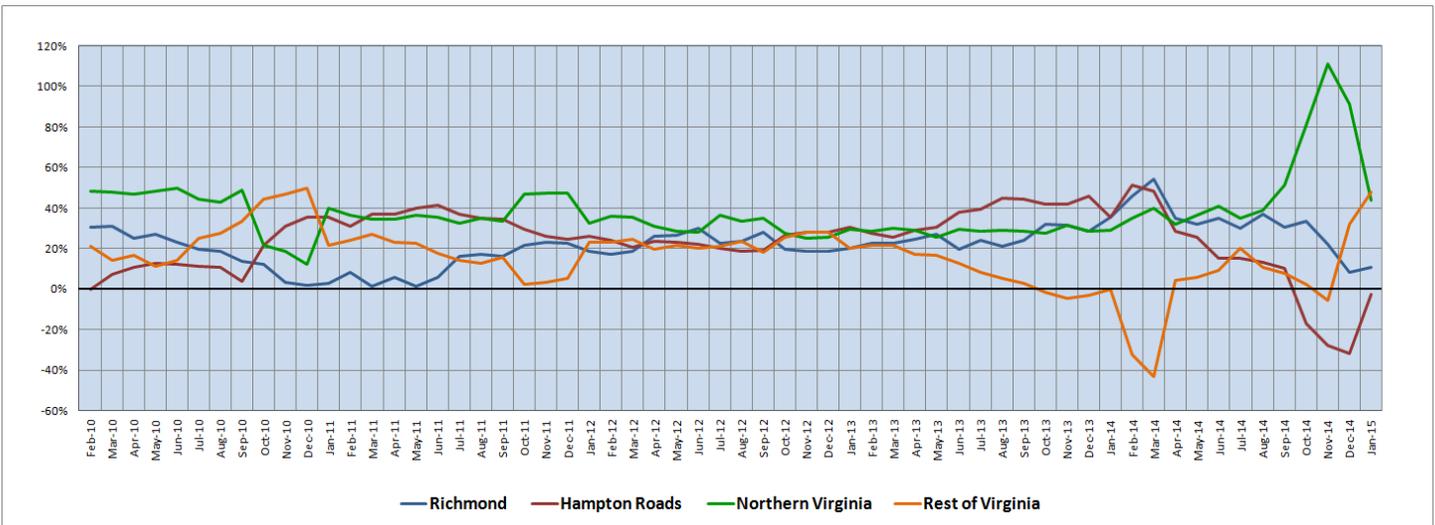
Despite the small employment gain in Hampton Roads’ HC&SA sector in January, its year-over-year HC&SA employment growth rate remained in negative territory for the fourth consecutive month. Regardless, it still experienced a significant rebound from its decade-long low of -1.70% in December to just -0.23% in January. Meanwhile, the Rest of Virginia, the only other region in the state to have increased HC&SA employment in January, saw its year-over-year employment growth rate more than double to 2.85%, its highest value in more than five years. Richmond also saw its year-over-year HC&SA employment growth rate double during the month, albeit from the lower base of 0.50% in December to 1.01% in January.

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.



Over the past 12 months, most HC&SA employment growth in Virginia has taken place in Northern Virginia and the Rest of Virginia. However, these two regions have seen their respective 12-month HC&SA employment growth shares trend in different directions in recent months. In November, Northern Virginia’s 12-month HC&SA regional growth share was over 100%, but its share has fallen to 43.84% in January. Meanwhile, the HC&SA growth share of the Rest of Virginia was negative two months ago, but this value reached a four-year high of 47.95% in January. Richmond’s 12-month HC&SA employment growth share increased slightly in January to 10.96%, while the increase in Hampton Roads’ growth share was not quite enough to get it out of negative territory.

Subsector Employment Growth

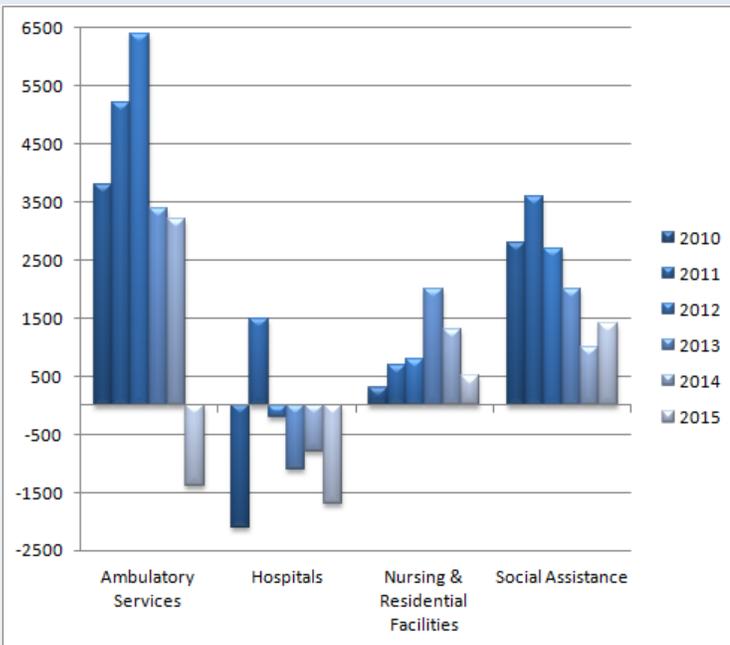


Figure 4: Annual & YTD Change in HC&SA Subsector Employment (Not Seasonally Adjusted, Dec. to Dec.)

Virginia’s Hospitals have lost jobs in each of the past three years, and the new year has started out no better after the subsector lost 1,700 HC&SA jobs in January, wiping out all of its gains from the fourth quarter of 2014 in the process. Ambulatory Health Care Services also experienced a significant employment decline, although its loss of 1,400 jobs during the month failed to wipe out even half of the 3,100 jobs the subsector created in the fourth quarter of last year.

Virginia’s other two HC&SA subsectors managed to perform much better in January. The Social Assistance subsector began 2015 on a high note by creating 1,400 jobs in January, which represents its best one-month performance since May 2009. Meanwhile, Nursing & Residential Care Facilities added to its strong gains in December by creating an additional 500 jobs this month. The monthly gain in Nursing & Residential Care Facilities is particularly propitious given that this subsector has not created jobs in any January in more than a decade.

Distribution of Growth by Subsector

Not Seasonally Adjusted	Employment, in Thousands				Growth Rate, Annualized		
	Jan. 2014	Oct. 2014	Dec. 2014	Jan. 2015	12 Month	3 Month	1 Month
Virginia							
Health Care & Social Assistance	404.1	410.0	412.6	<i>411.4</i>	1.8%	1.4%	-3.4%
<i>Ambulatory Health Care Services</i>	159.2	163.5	164.9	<i>163.5</i>	2.7%	0.0%	-9.7%
<i>Hospitals</i>	101.9	101.4	102.1	<i>100.4</i>	-1.5%	-3.9%	-18.2%
<i>Nursing & Residential Care Facilities</i>	71.9	73.0	73.9	<i>74.4</i>	3.5%	7.9%	8.4%
<i>Social Assistance</i>	71.1	72.1	71.7	<i>73.1</i>	2.8%	5.7%	26.1%
Virginia Beach, Norfolk, Newport News							
Health Care & Social Assistance	86.9	86.6	86.5	<i>86.7</i>	-0.2%	0.5%	2.8%
<i>Hospitals</i>	22.0	21.4	21.5	<i>21.2</i>	-3.6%	-3.7%	-15.5%
Northern Virginia							
Health Care & Social Assistance	115.5	118.5	120.1	<i>118.7</i>	2.8%	0.7%	-13.1%
<i>Ambulatory Health Care Services</i>	53.3	54.7	55.7	<i>54.8</i>	2.8%	0.7%	-17.8%
<i>Hospitals</i>	23.3	23.5	23.8	<i>23.7</i>	1.7%	3.4%	-4.9%

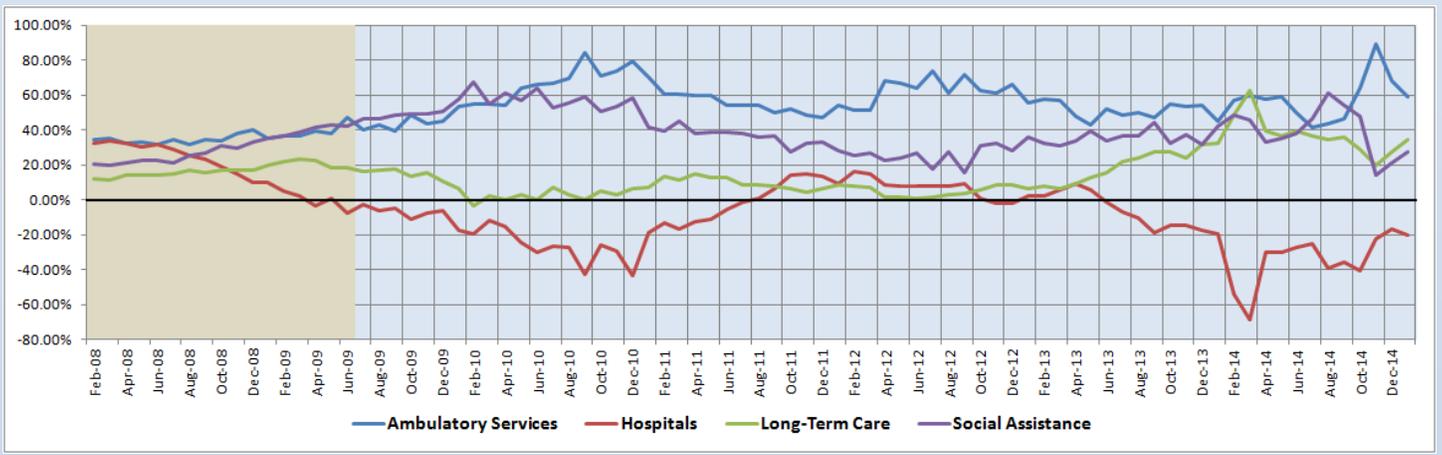
Preliminary estimates are italicized

Both Nursing & Residential Care Facilities and Social Assistance have been enjoying accelerating employment growth in recent months. Both subsectors currently have 3-month HC&SA employment growth rates that are more than double their corresponding 12-month growth rate, a feat that is particularly impressive given that both of those 12-month growth rates are above average relative to the state’s overall HC&SA sector, which is currently growing at a 1.8% annual rate. Ambulatory Health Care Services also has an above-average 12-month employment growth rate at 2.7%, although this subsector’s more recent performance has been more desultory.

Share of 12-Month Growth by Subsector

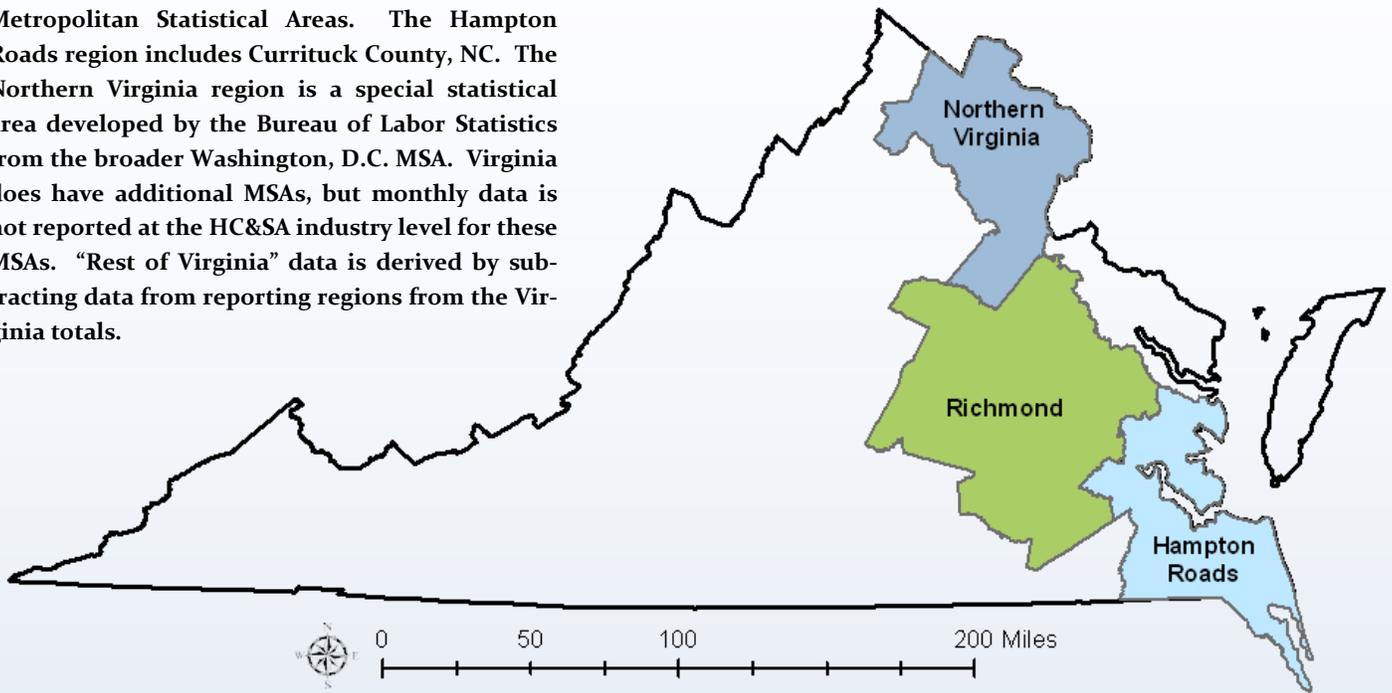
Over the past two months, Ambulatory Health Care Services has seen its 12-month HC&SA employment growth share decline from 88.89% to 58.90%. Most of this growth share has been taken by Nursing & Residential Care Facilities and Social Assistance, which have seen their respective 12-month HC&SA employment growth shares increase to 34.25% and 27.40%. Meanwhile, the Hospitals subsector experienced a small drop in its 12-month HC&SA employment growth share from -17.02% in December to -20.55% in January. Including January’s result, Virginia’s Hospitals subsector has now had a negative 12-month employment growth share for 20 consecutive months.

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)