



Virginia Healthcare Workforce Briefs

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

Series 2, Issue 36

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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.
- ◆ Virginia's Health Care & Social Assistance (HC&SA) sector ended the year on a high note with the additions of 1,500 new jobs to the state's economy. Nearly all of this growth came from outside Virginia's three major regions as the Rest of Virginia created 1,400 jobs during the month, which represents a 13.9% annualized growth rate.
- ◆ With 400 jobs added in December, Northern Virginia was the only other region in the state to experience an increase in HC&SA employment during the month. Hampton Roads saw no net change in its HC&SA employment in December, while Richmond was the laggard of the group with a loss of 300 HC&SA jobs during the month.
- ◆ HC&SA subsector employment growth was strongest in Nursing & Residential Care Facilities, where 900 jobs were created in December. Ambulatory Health Care Services also enjoyed a strong month with the addition of 500 new jobs to the state's economy, while Hospitals managed to eke out a small gain of 200 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		
	Dec. 2013	Sept. 2014	Nov. 2014	Dec. 2014	12 Month	3 Month	1 Month
Virginia							
Total Nonfarm	3,785.3	3,781.8	3,816.7	3,814.0	0.8%	3.4%	-0.8%
Health Care & Social Assistance	414.2	414.8	418.8	420.3	1.5%	5.4%	4.4%
Virginia Beach, Norfolk, Newport News							
Total Nonfarm	753.7	759.1	762.2	762.0	1.1%	1.5%	-0.3%
Health Care & Social Assistance	88.9	88.3	88.5	88.5	-0.4%	0.9%	0.0%
Northern Virginia							
Total Nonfarm	1,377.6	1,372.3	1,388.7	1,389.7	0.9%	5.2%	0.9%
Health Care & Social Assistance	115.5	111.9	115.7	116.1	0.5%	15.9%	4.2%
Richmond							
Total Nonfarm	638.7	644.5	654.1	653.9	2.4%	6.0%	-0.4%
Health Care & Social Assistance	80.6	86.3	86.5	86.2	6.9%	-0.5%	-4.1%
Rest of Virginia							
Total Nonfarm	1,015.3	1,005.9	1,011.7	1,008.4	-0.7%	1.0%	-3.8%
Health Care & Social Assistance	129.2	128.3	128.1	129.5	0.2%	3.8%	13.9%

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

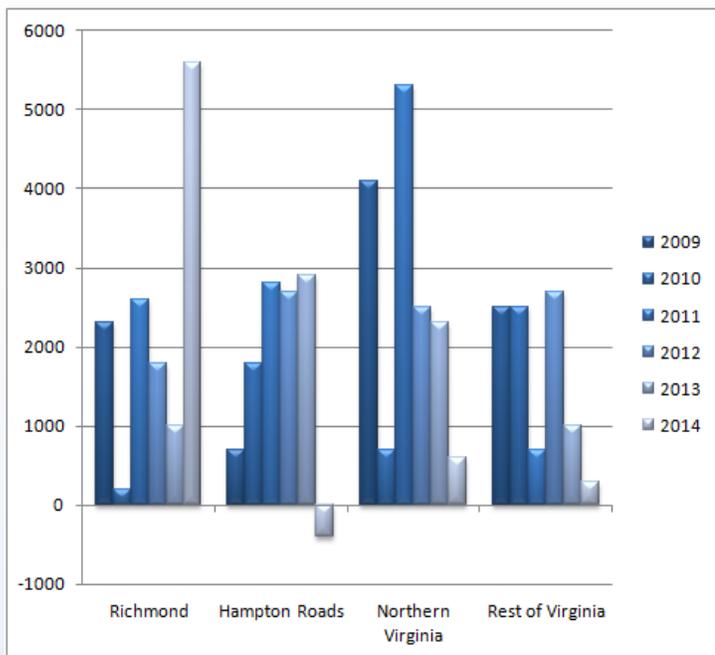


Figure 1: Annual Change in HC&SA Employment (Not Seasonally Adjusted, Change from Dec to Dec).

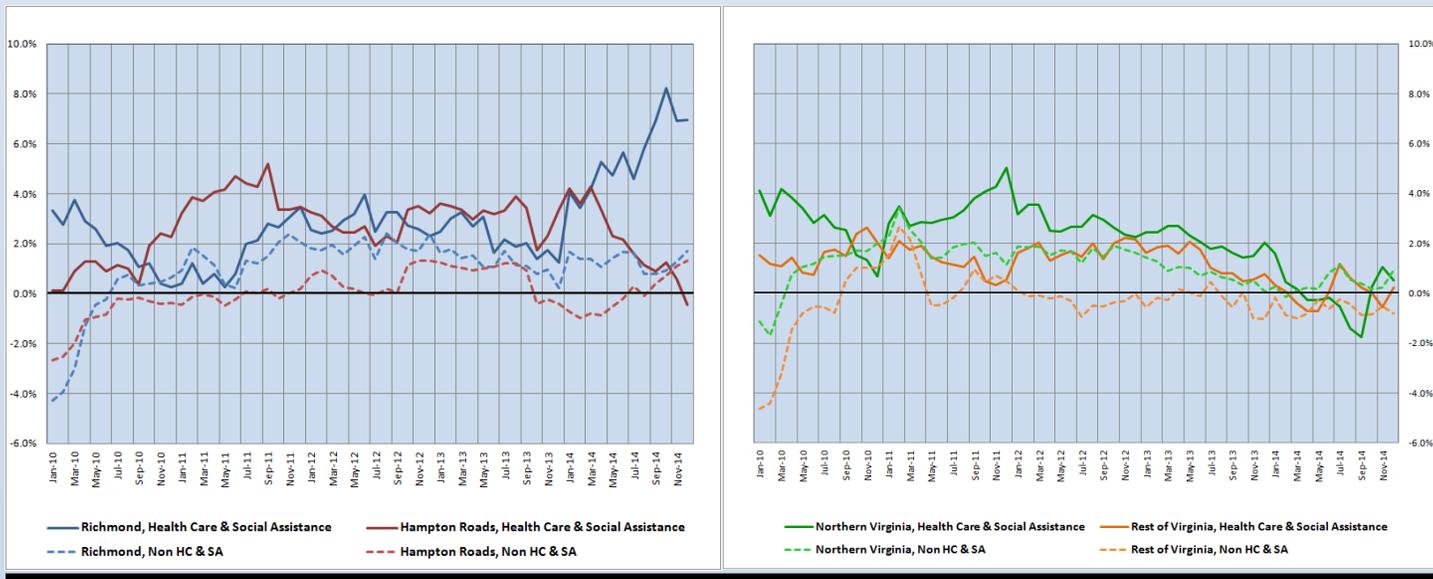
According to preliminary data released on January 27, 2014 by the U.S. Department of Labor, Bureau of Labor Statistics, Virginia's HC&SA sector ended the year on a high note with the creation of 1,500 new jobs in December. Nearly all of this growth came from the Rest of Virginia, which added 1,400 HC&SA jobs to the state's economy; the only other region in the state to create HC&SA jobs during the month was Northern Virginia, which added 400 jobs. However, some of these gains were erased by the loss of 300 HC&SA jobs in Richmond, while Hampton Roads saw no change in HC&SA employment in December.

Although Richmond experienced a net loss of 100 HC&SA jobs in Q4, the region still created 5,600 jobs in the sector in 2014, which represents 92% of statewide HC&SA employment growth. Meanwhile, Northern Virginia's HC&SA sector experienced a resurgence in Q4 with the addition of 4,200 jobs. Thanks to this growth, the region added 600 HC&SA jobs during the year. The Rest of Virginia also made a small positive contribution of 300 new HC&SA jobs in 2014.

Year-Over-Year Regional Employment Growth

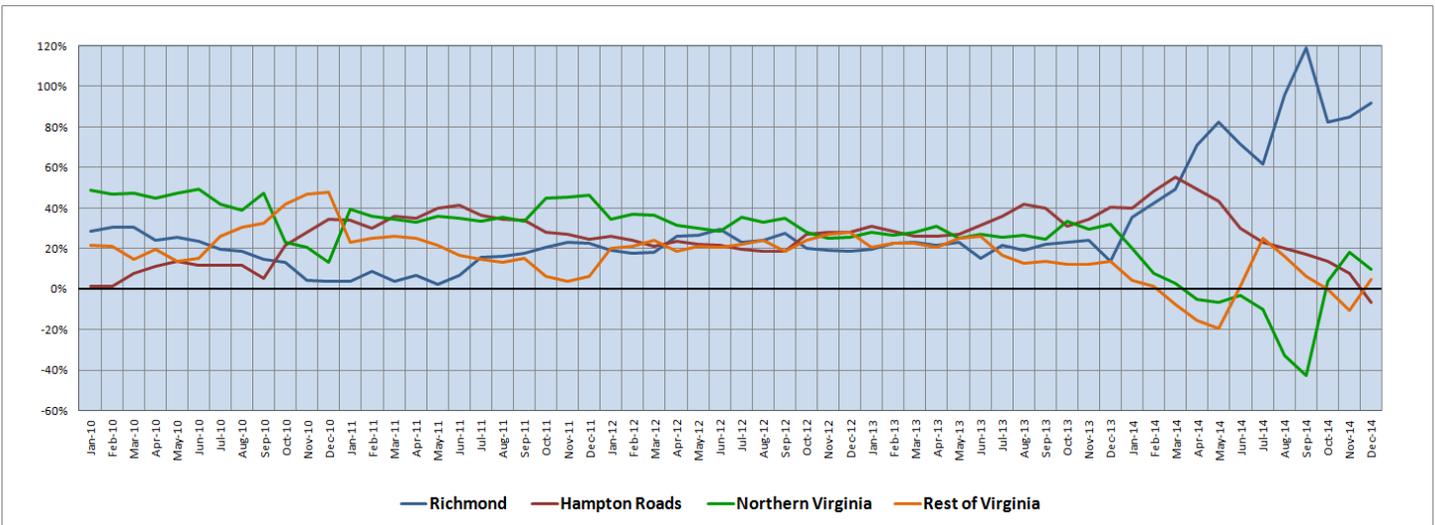
In December, Richmond's year-over-year HC&SA employment growth rate saw a slight uptick to 6.95% from 6.92% in November. Although this is down from its six-year high of 8.22% in October, it still significantly exceeds the corresponding growth rates for Virginia's other metropolitan regions. Northern Virginia remained the second-fastest growth region in the state in terms of year-over-year HC&SA employment growth, although its growth rate dropped by half during the month from 1.05% to 0.52%. Meanwhile, the Rest of Virginia saw its year-over-year HC&SA growth rate jump back up to 0.23% after dipping into negative territory in November. Hampton Roads, on the other hand, saw its growth rate fall to -0.45%

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.



For the first time in more than a decade, Hampton Roads’ 12-month HC&SA regional employment growth share turned negative in December. For the month, its growth share fell from 7.58% to -6.56%. At the same time, however, the Rest of Virginia’s 12-month HC&SA regional employment growth share rebounded from a six-month low of -10.61% in November to 4.92% in December. Northern Virginia has also been responsible for relatively little HC&SA employment growth over the past 12 months as its current growth share is just 9.84%. Meanwhile, as has been the case for each of the past nine months, Richmond continues to be responsible for the majority of 12-month HC&SA regional employment growth. In December, Richmond’s growth rate increased from 84.85% to 91.80%, which represents its second-highest value this year.

Subsector Employment Growth

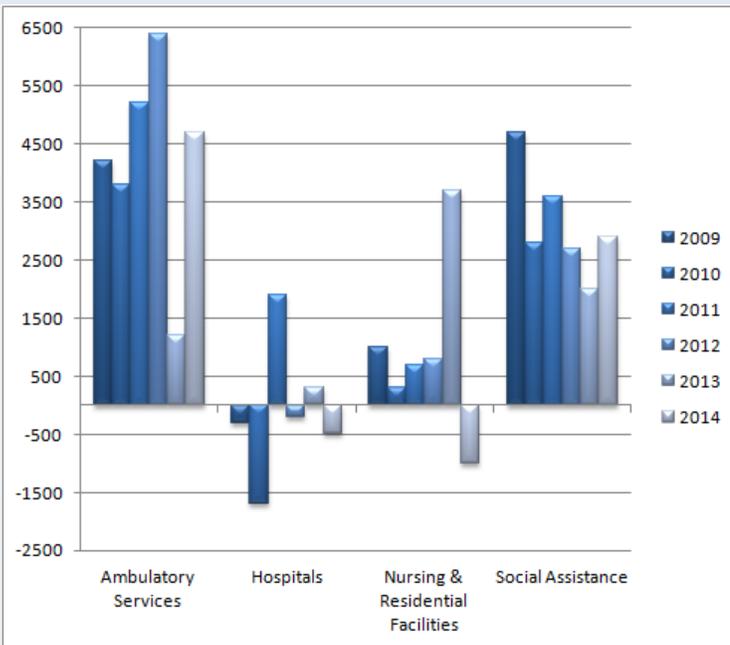


Figure 4: Annual & YTD Change in HC&SA Subsector Employment (Not Seasonally Adjusted, Dec. to Dec.)

Nursing & Residential Care Facilities finished 2014 strong with the creation of 900 HC&SA jobs in December. Although this gain helped to reverse the loss of 800 jobs over the previous three months, this HC&SA subsector still saw employment fall by 1,000 over the course of the year, making it the worst performer among all of Virginia’s HC&SA subsectors. The Hospitals subsector also experienced a decrease in employment in 2014 despite a gain of 200 new jobs in December, although this full-year loss was a somewhat more modest decline of 500 jobs. Including this year’s result, the Hospitals subsector has lost jobs in three of the past six years.

Once again, HC&SA employment growth was concentrated in Ambulatory Health Care Services and Social Assistance. Ambulatory Health Care Services created 500 HC&SA jobs in December and 4,700 total jobs in 2014. Meanwhile, despite a modest loss of 100 jobs in December, the Social Assistance subsector still managed to boost employment by 2,900 during the year.

Distribution of Growth by Subsector

Not Seasonally Adjusted	Employment, in Thousands				Growth Rate, Annualized		
	Dec. 2013	Sept. 2014	Nov. 2014	Dec. 2014	12 Month	3 Month	1 Month
Virginia							
Health Care & Social Assistance	414.2	414.8	418.8	420.3	1.5%	5.4%	4.4%
<i>Ambulatory Health Care Services</i>	159.5	160.5	163.7	164.2	2.9%	9.5%	3.7%
<i>Hospitals</i>	109.7	108.4	109.0	109.2	-0.5%	3.0%	2.2%
<i>Nursing & Residential Care Facilities</i>	74.3	72.7	72.4	73.3	-1.3%	3.3%	16.0%
<i>Social Assistance</i>	70.7	73.2	73.7	73.6	4.1%	2.2%	-1.6%
Virginia Beach, Norfolk, Newport News							
Health Care & Social Assistance	88.9	88.3	88.5	88.5	-0.4%	0.9%	0.0%
<i>Hospitals</i>	23.2	22.5	22.3	22.3	-3.9%	-3.5%	0.0%
Northern Virginia							
Health Care & Social Assistance	115.5	111.9	115.7	116.1	0.5%	15.9%	4.2%
<i>Ambulatory Health Care Services</i>	53.3	52.0	54.4	54.4	2.1%	19.8%	0.0%
<i>Hospitals</i>	24.1	23.4	23.8	23.9	-0.8%	8.8%	5.2%

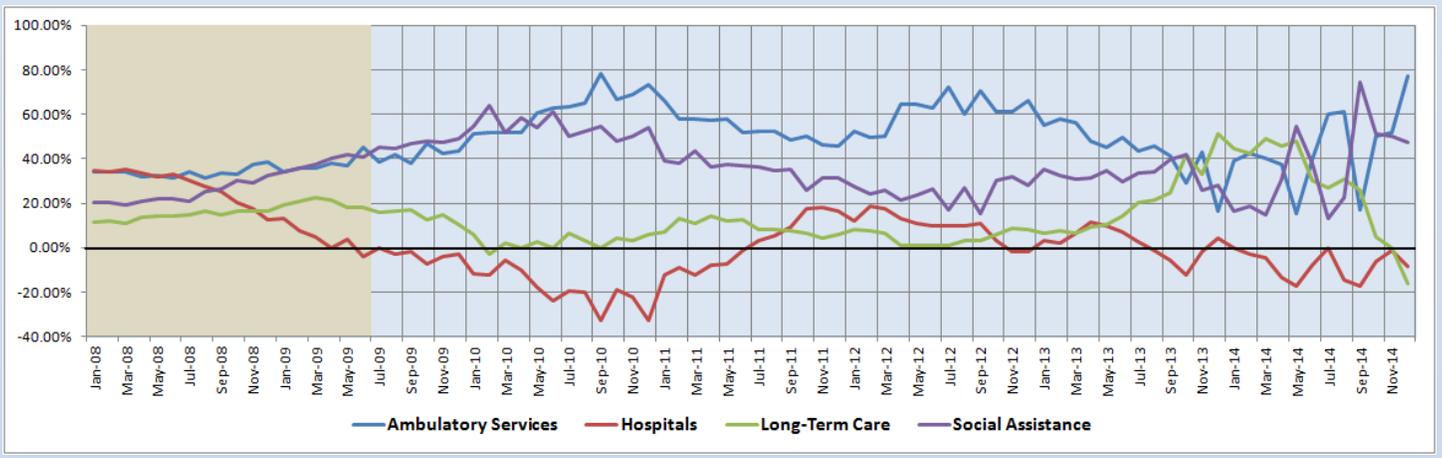
Preliminary estimates are italicized

Although the Social Assistance sector is currently producing robust 12-month employment growth of 4.1%, its short-term performance has been somewhat less impressive with three-month annualized employment growth of just 2.2%. Alternatively, every other HC&SA subsector in Virginia is experience faster employment growth in the short run. Ambulatory Health Care Services has a 12-month employment growth rate that is nearly double the statewide average at 2.9%, but its 3-month annualized growth rate is a far more impressive 9.5%. Meanwhile, both Nursing & Residential Care Facilities and Hospitals currently have negative 12-month growth rates, but their 3-month growth rates are 3.3% and 3.0%, respectively.

Share of 12-Month Growth by Subsector

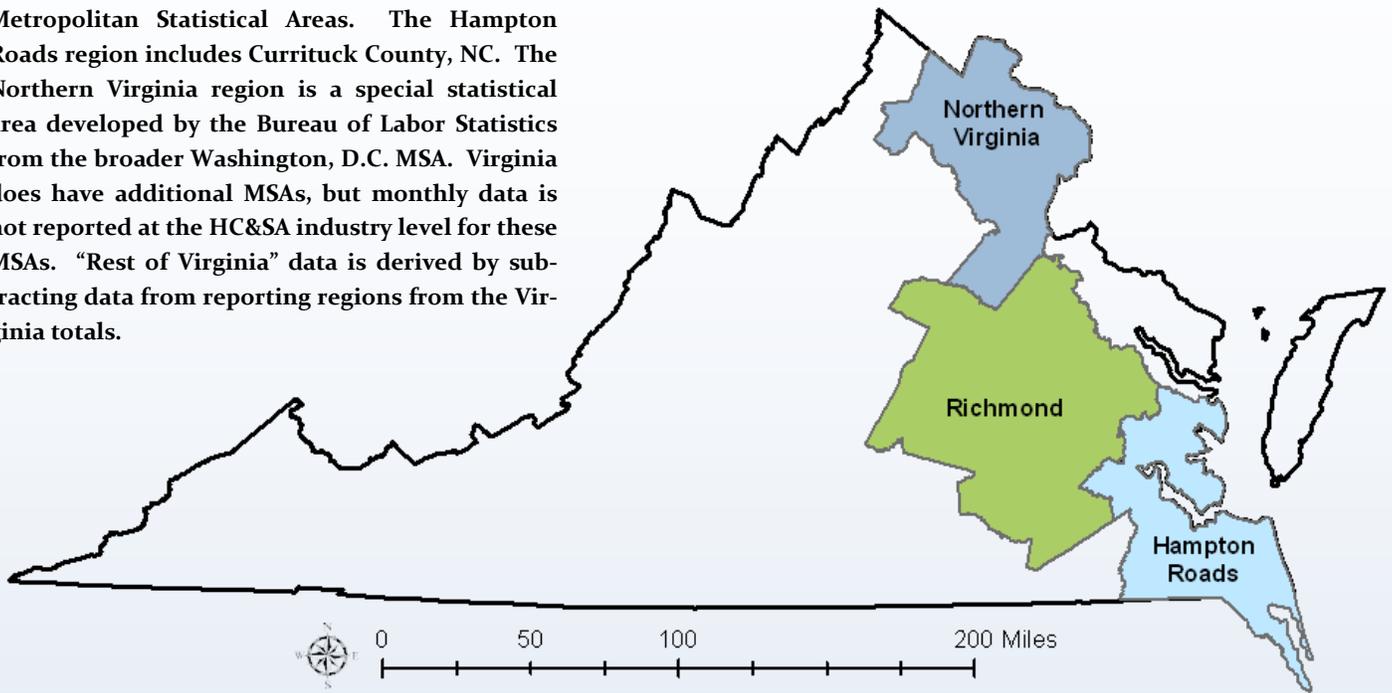
Ambulatory Health Care Services experienced a large spike in its 12-month employment growth share from 51.2% in November to 77.05% in December, which represents its highest monthly growth share since September 2010. Meanwhile, for the third consecutive month, Social Assistance saw a drop in its 12-month employment growth share, although this subsector has still been responsible for 47.54% of all HC&SA employment growth in the state over the previous 12 months. Nursing & Residential Care Facilities experienced the largest decline in December as its 12-month growth share fell to -16.39%, its lowest value in more than a decade. The employment growth share of Hospitals also fell during the month to -8.20%.

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)