



Virginia Healthcare Workforce Briefs

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

Series 2, Issue 38

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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 experienced a modest loss of 100 jobs during the month of February. These employment losses came from two regions: Hampton Roads and the Rest of Virginia. Both of these regions lost 1,000 jobs during the month
- ◆ Northern Virginia was a bright spot for Virginia's HC&SA sector in February. Despite significant job losses in Hampton Roads and the Rest of the State, Northern Virginia managed to create 1,500 new HC&SA jobs during the month. Richmond also contributed positively to HC&SA jobs growth in February with the addition of 400 jobs.
- ◆ Despite the overall employment decline, Nursing & Residential Care Facilities was the only HC&SA subsector to lose jobs in February. However, the loss of 1,200 jobs in this subsector completely wiped out the gain of 1,000 jobs in Social Assistance and 100 jobs in Hospitals.

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		
	Feb. 2014	Nov. 2014	Jan. 2015	Feb. 2015	12 Month	3 Month	1 Month
Virginia							
Total Nonfarm	3,706.0	3,822.9	3,739.3	3,748.3	1.1%	-7.6%	2.9%
Health Care & Social Assistance	403.3	411.3	411.9	411.8	2.1%	0.5%	-0.3%
Virginia Beach, Norfolk, Newport News							
Total Nonfarm	737.5	759.4	743.9	742.8	0.7%	-8.5%	-1.8%
Health Care & Social Assistance	86.8	86.9	86.8	85.8	-1.2%	-5.0%	-13.0%
Northern Virginia							
Total Nonfarm	1,357.2	1,397.1	1,371.7	1,374.3	1.3%	-6.4%	2.3%
Health Care & Social Assistance	115.4	119.7	119.6	121.1	4.9%	4.8%	16.1%
Richmond							
Total Nonfarm	616.7	643.5	627.6	628.1	1.8%	-9.2%	1.0%
Health Care & Social Assistance	79.1	80.8	79.7	80.1	1.3%	-3.4%	6.2%
Rest of Virginia							
Total Nonfarm	994.6	1,022.9	996.1	1,003.1	0.9%	-7.5%	8.8%
Health Care & Social Assistance	112.0	123.9	125.8	124.8	2.3%	2.9%	-9.1%

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

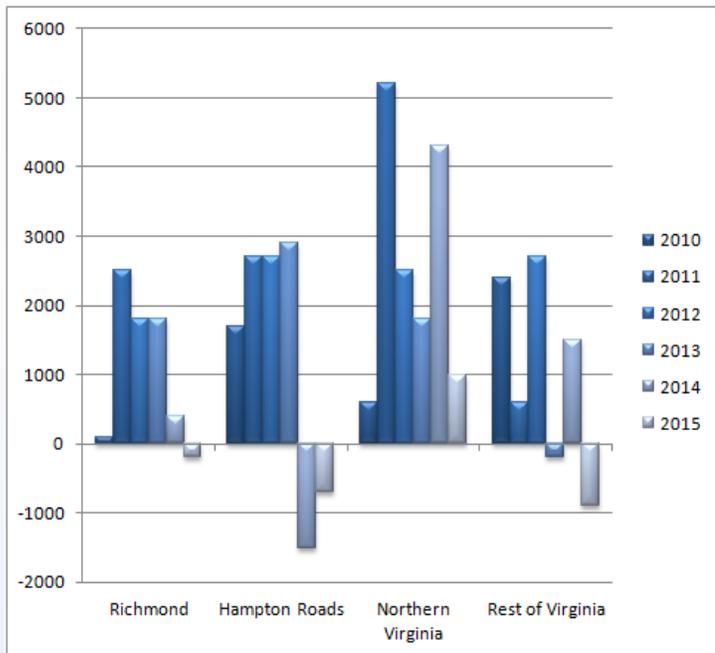


Figure 1: Annual Change in HC&SA Employment (Not Seasonally Adjusted, Change from Dec to Dec).

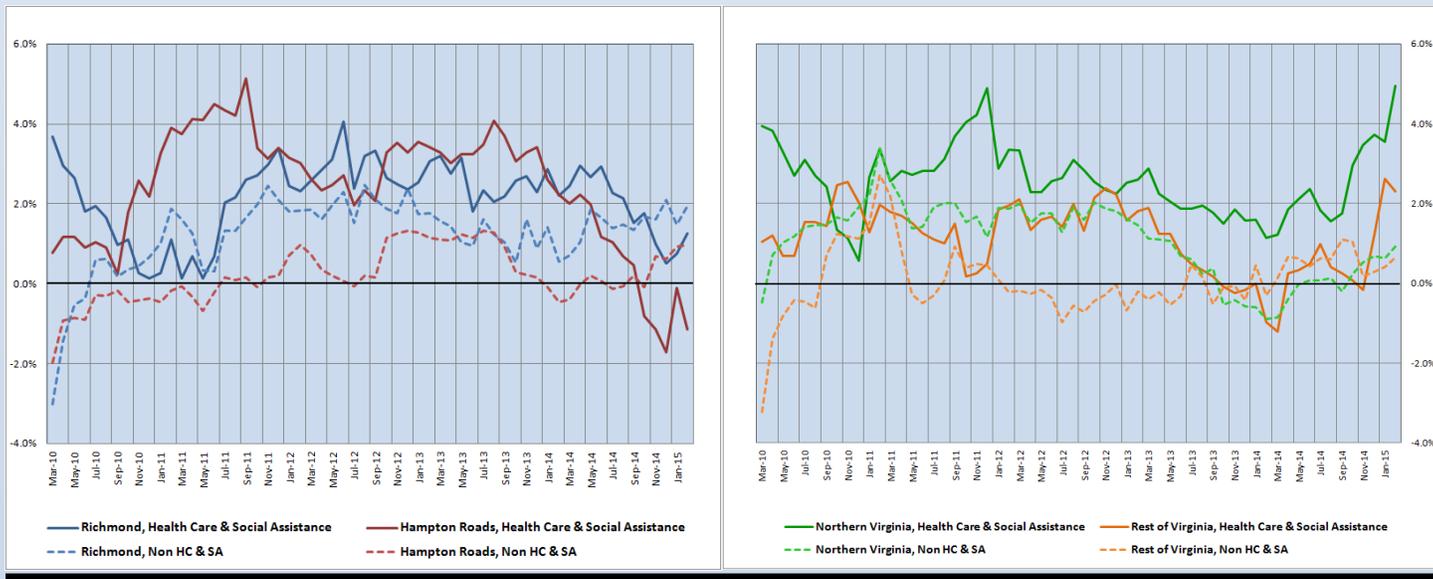
According to preliminary data released on Friday, March 27, 2015 by the U.S. Department of Labor, Bureau of Labor Statistics, Virginia’s HC&SA sector failed to rebound from January’s loss of 700 jobs as employment fell by an additional 100 jobs in February. Hampton Roads and the Rest of Virginia each lost 1,000 HC&SA jobs during the month. Meanwhile, Northern Virginia’s HC&SA sector recouped all of its job losses from the previous month by creating 1,500 new HC&SA jobs in February. Richmond’s HC&SA sector also managed to limit the statewide losses in February with the creation of 400 jobs during the month.

During the first two months of 2015, the performance of Virginia’s HC&SA sector has been less than impressive. Northern Virginia, which created by far the most HC&SA jobs in 2014, is currently the only region in the state that has made a positive contribution to HC&SA employment in the new year. While Northern Virginia has created 1,000 new HC&SA jobs so far this year, the other three regions in the state have combined to lose 1,800 HC&SA jobs year-to-date.

Year-Over-Year Regional Employment Growth

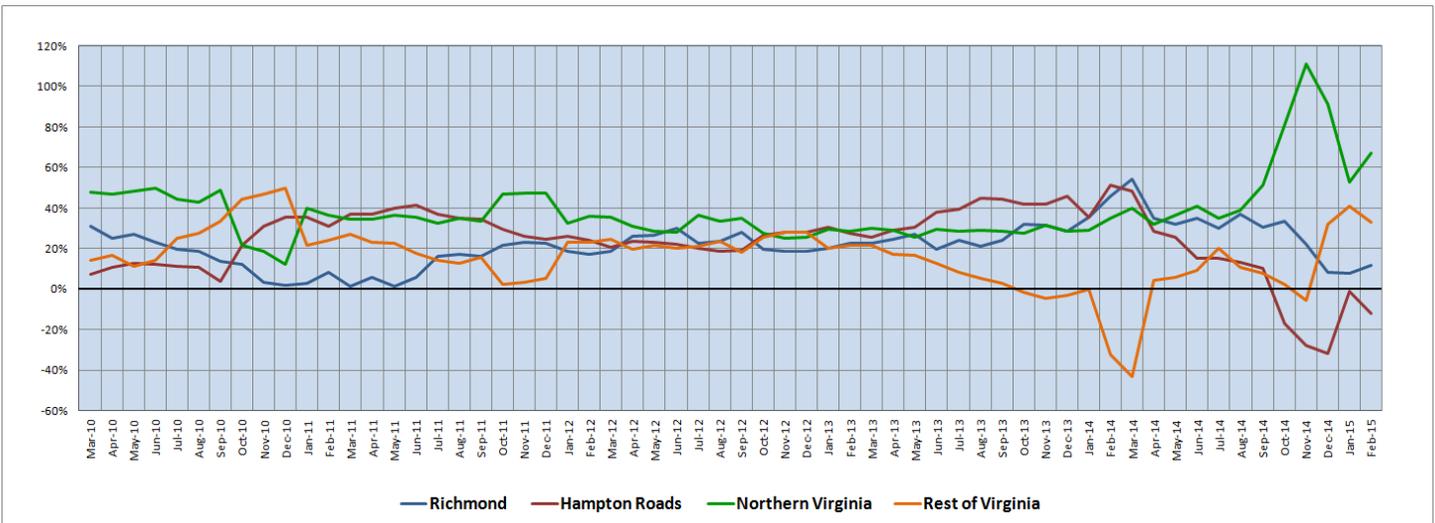
With its strong performance in February, Northern Virginia saw its year-over-year HC&SA employment growth rate increase from 3.55% to 4.94%, reaching its highest level since 2005. Northern Virginia’s HC&SA sector has shown remarkable improvement over the past year as its year-over-year HC&SA employment growth rate has more than quadrupled during that time period. HC&SA employment in the Rest of Virginia has also shown tremendous improvement over the past year. One year ago, its year-over-year HC&SA employment growth rate was in negative territory, but that region’s HC&SA sector is now growing at a 2.30% annual rate.

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, Northern Virginia’s HC&SA sector has been responsible for 67.06% of all statewide HC&SA employment growth. Thanks to the strong HC&SA employment gains in the region in February, this 12-month growth share is up considerably from January’s level of 52.56%. Northern Virginia’s has been the state’s single largest contributor to HC&SA employment growth for each of the past 10 months. Furthermore, its 12-month growth share has not dipped below 50% since last August. Richmond also saw its 12-month HC&SA employment growth share increase during the month from 7.69% to 11.7%. However, Richmond’s growth share is still considerable below the Rest of Virginia’s growth share, which dropped in February from 41.03% to 32.94%.

Subsector Employment Growth

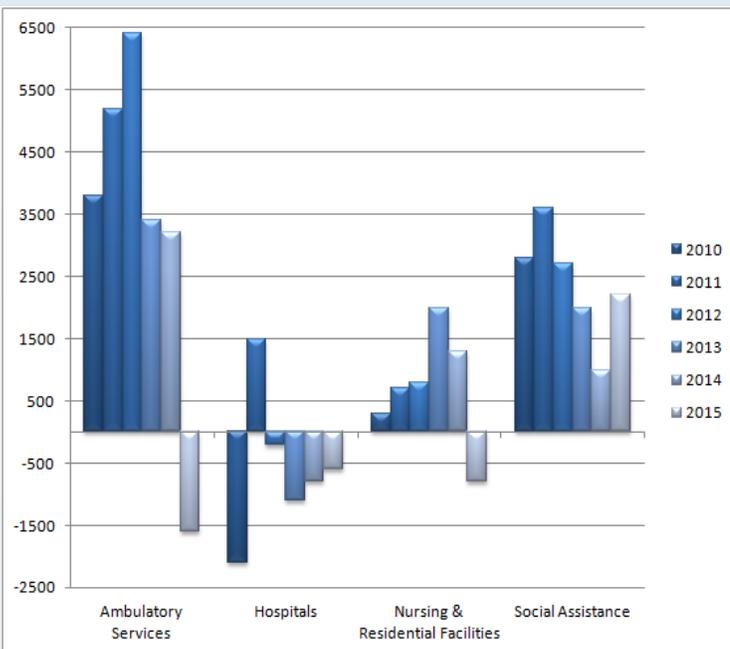


Figure 4: Annual & YTD Change in HC&SA Subsector Employment (Not Seasonally Adjusted, Dec. to Dec.)

Nursing & Residential Care Facilities had a difficult month in February as the HC&SA subsector shed 1,200 jobs. This represents the worst monthly loss for Virginia’s Nursing & Residential Care Facilities in more than a decade. However, most of these losses were made up in the Social Assistance subsector, which added 1,000 jobs to the state’s economy in February. The Hospitals subsector also saw employment expand in February, although the gains amounted to a modest 100 jobs. Meanwhile, Ambulatory Health Care Services experienced no change in employment during the month.

The Social Assistance subsector has had a tremendous start to the new year with 2,200 jobs created so far. However, the other three HC&SA subsectors in the state have not fared nearly as well. Ambulatory Health Care Services has been the worst performer with the loss of 1,600 jobs so far in 2015, thanks entirely to its poor performance in January, while Nursing & Residential Care Facilities and Hospitals have combined to lose 1,400 HC&SA jobs this year.

Distribution of Growth by Subsector

Not Seasonally Adjusted	Employment, in Thousands				Growth Rate, Annualized		
	Feb. 2014	Nov. 2014	Jan. 2015	Feb. 2015	12 Month	3 Month	1 Month
Virginia							
Health Care & Social Assistance	403.3	411.3	411.9	<i>411.8</i>	2.1%	0.5%	-0.3%
<i>Ambulatory Health Care Services</i>	159.3	164.6	163.3	<i>163.3</i>	2.5%	-3.1%	0.0%
<i>Hospitals</i>	101.6	102.0	101.4	<i>101.5</i>	-0.1%	-1.9%	1.2%
<i>Nursing & Residential Care Facilities</i>	72.0	72.8	74.3	<i>73.1</i>	1.5%	1.7%	-17.7%
<i>Social Assistance</i>	70.4	71.9	72.9	<i>73.9</i>	5.0%	11.6%	17.8%
Virginia Beach, Norfolk, Newport News							
Health Care & Social Assistance	86.8	86.9	86.8	<i>85.8</i>	-1.2%	-5.0%	-13.0%
<i>Hospitals</i>	21.9	21.4	21.4	<i>21.2</i>	-3.2%	-3.7%	-10.7%
Northern Virginia							
Health Care & Social Assistance	115.4	119.7	119.6	<i>121.1</i>	4.9%	4.8%	16.1%
<i>Ambulatory Health Care Services</i>	53.4	55.5	54.9	<i>55.7</i>	4.3%	1.4%	19.0%
<i>Hospitals</i>	23.3	23.8	23.8	<i>24.0</i>	3.0%	3.4%	10.6%

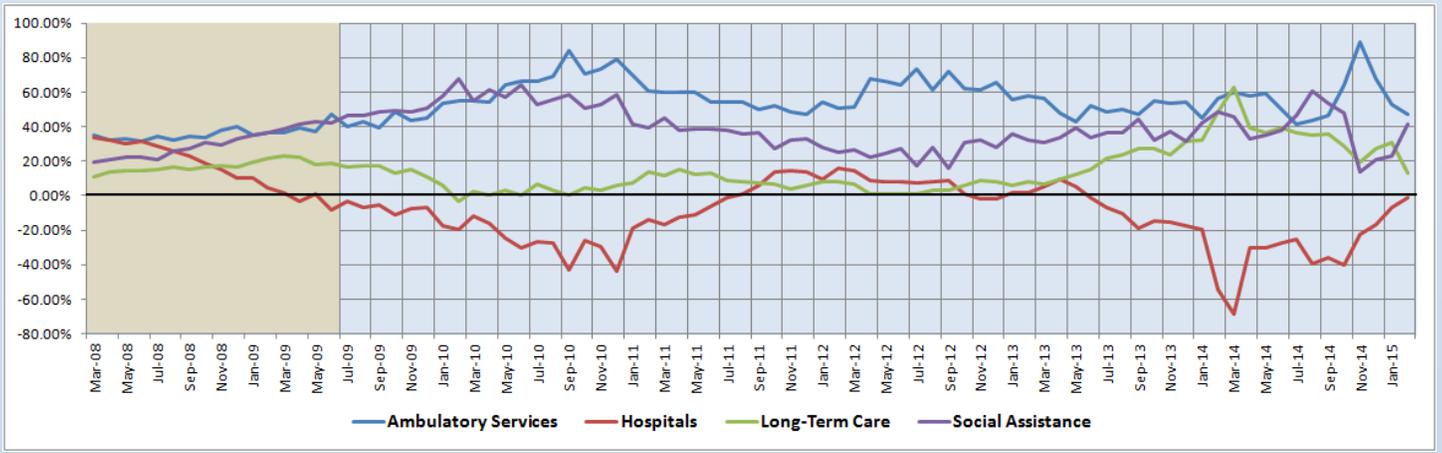
Preliminary estimates are italicized

The Social Assistance subsector is currently enjoying both solid short-term and solid long-term employment growth. Its current 12-month annualized employment growth rate is 5.0%, double the corresponding rate for Virginia’s overall HC&SA sector, while its three-month annualized employment growth rate is an even more impressive 11.6%. Ambulatory Health Care Services is the only other HC&SA subsector that currently enjoys above-average 12-month employment growth, although its three-month annualized employment growth rate is a far less impressive -3.1%. Meanwhile, despite its losses in February, Nursing & Residential Care Facilities is still experience a modest amount of long-term employment growth.

Share of 12-Month Growth by Subsector

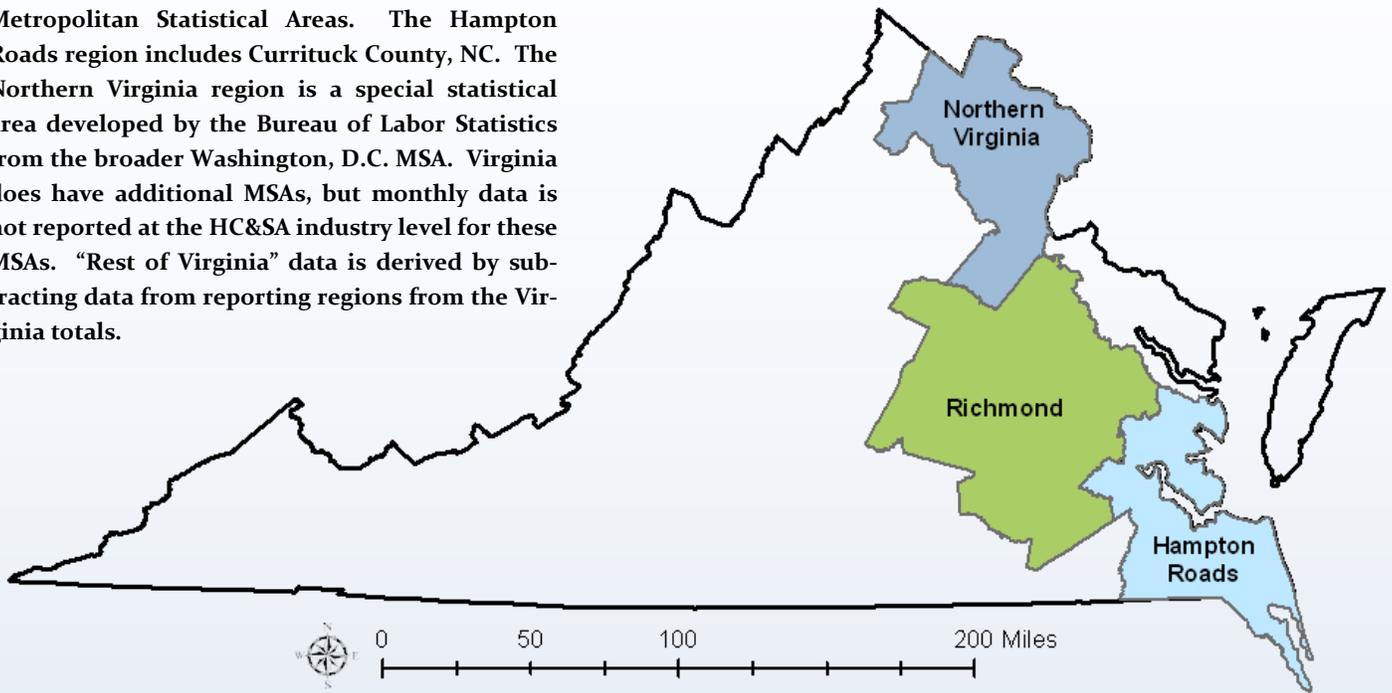
Although Ambulatory Health Care Services is still the subsector that has been most responsible for Virginia’s HC&SA employment growth over the past year, its 12-month growth share fell for the third consecutive month in February to 47.06%. During the same time period, Virginia’s Social Assistance subsector has seen a surge in its 12-month HC&SA employment growth share. After reaching a decade-long low of 13.89% last November, the 12-month employment growth share of Virginia’s Social Assistance subsector has increased all the way up to 41.18%. As for the Hospitals subsector, it continues to sport a negative growth share at -1.18%, but this value does represents a 21-month high.

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)