



Virginia Healthcare Workforce Briefs

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

Series 2, Issue 45

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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.
- ◆ Virginia's Health Care & Social Assistance (HC&SA) sector experienced its worst monthly employment loss in nearly two years after losing 2,300 jobs in September. Despite this decline, however, employment in Virginia's HC&SA sector has still grown by 1.4% over the past year.
- ◆ Northern Virginia was responsible for nearly half of the state's HC&SA employment losses in September with a decline of 1,200 jobs. Meanwhile, the Rest of Virginia lost 900 HC&SA jobs, and Richmond's HC&SA sector saw employment decline by 400. Only Hampton Roads bucked this trend with the creation of 200 new HC&SA jobs.
- ◆ Despite September's significant losses, Virginia's Hospitals actually gained 1,000 jobs. However, this gain was wiped out by the losses in the other three subsectors. Ambulatory Health Care Services lost 1,800 jobs, Nursing & Residential Care Facilities lost 800 jobs, and Social Assistance saw employment fall by 700.

Data in Brief

Not Seasonally Adjusted*	Employment, in Thousands				Growth Rate, Annualized		
	Sept. 2014	June 2015	Aug. 2015	Sept. 2015	12 Month	3 Month	1 Month
Virginia							
Total Nonfarm	3,785.8	3,854.7	3,811.2	3,818.7	0.9%	-3.7%	2.4%
Health Care & Social Assistance	408.2	415.1	416.2	413.9	1.4%	-1.2%	-6.4%
Virginia Beach, Norfolk, Newport News							
Total Nonfarm	756.2	770.4	766.4	762.2	0.8%	-4.2%	-6.4%
Health Care & Social Assistance	87.2	86.4	86.4	86.6	-0.7%	0.9%	2.8%
Northern Virginia							
Total Nonfarm	1,379.4	1,428.1	1,411.8	1,406.8	2.0%	-5.8%	-4.2%
Health Care & Social Assistance	116.8	122.4	124.1	122.9	5.2%	1.6%	-11.0%
Richmond							
Total Nonfarm	631.1	639.5	630.7	630.6	-0.1%	-5.5%	-0.2%
Health Care & Social Assistance	80.5	80.3	81.0	80.6	0.1%	1.5%	-5.8%
Rest of Virginia							
Total Nonfarm	1,019.1	1,016.7	1,002.3	1,019.1	0.0%	0.9%	22.1%
Health Care & Social Assistance	123.7	126.0	124.7	123.8	0.1%	-6.8%	-8.3%

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

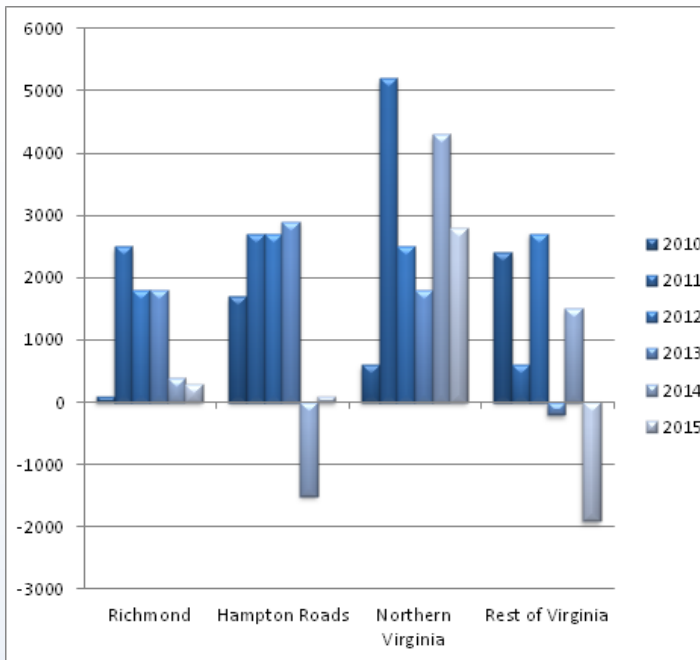


Figure 1: Annual Change in HC&SA Employment (Not Seasonally Adjusted, Change from Dec to Dec).

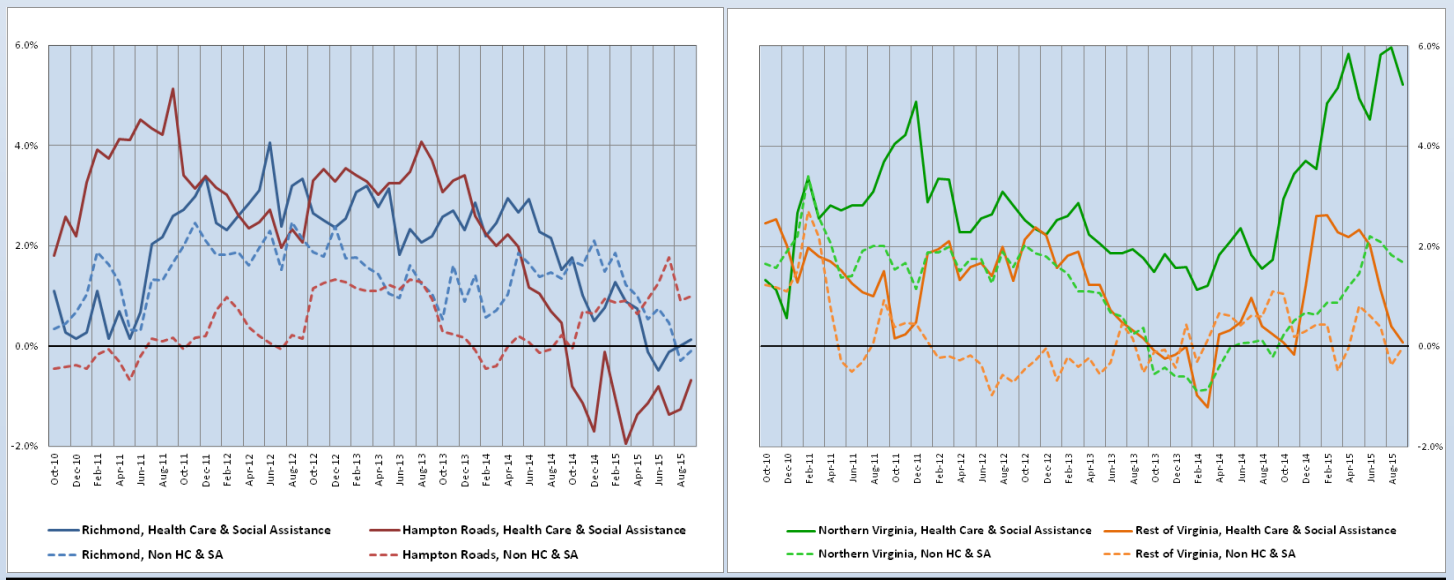
According to preliminary data released on Tuesday, October 20, 2015 by the U.S. Department of Labor, Bureau of Labor Statistics, Virginia's Health Care & Social Assistance (HC&SA) sector experienced its worst monthly employment decline since January 2014 after losing 2,300 jobs in September. This represents a one-month annualized employment growth rate of -6.4%

Despite this month's job losses, Hampton Roads actually saw HC&SA employment increase by 200 in September. Thanks to this gain, Hampton Roads has now become a positive contributor to the state's year-to-date HC&SA employment gains, although this gain amounts to just 100 new jobs created so far this year. Northern Virginia's HC&SA sector, which has created 2,800 jobs so far this year, is still responsible for the lion's share of all year-to-date HC&SA employment growth. However, this region lost 1,200 HC&SA jobs in September, the most of any region in the state. Meanwhile, the Rest of Virginia lost 900 HC&SA jobs during the month, and Richmond's HC&SA sector lost 400 jobs.

Year-Over-Year Regional Employment Growth

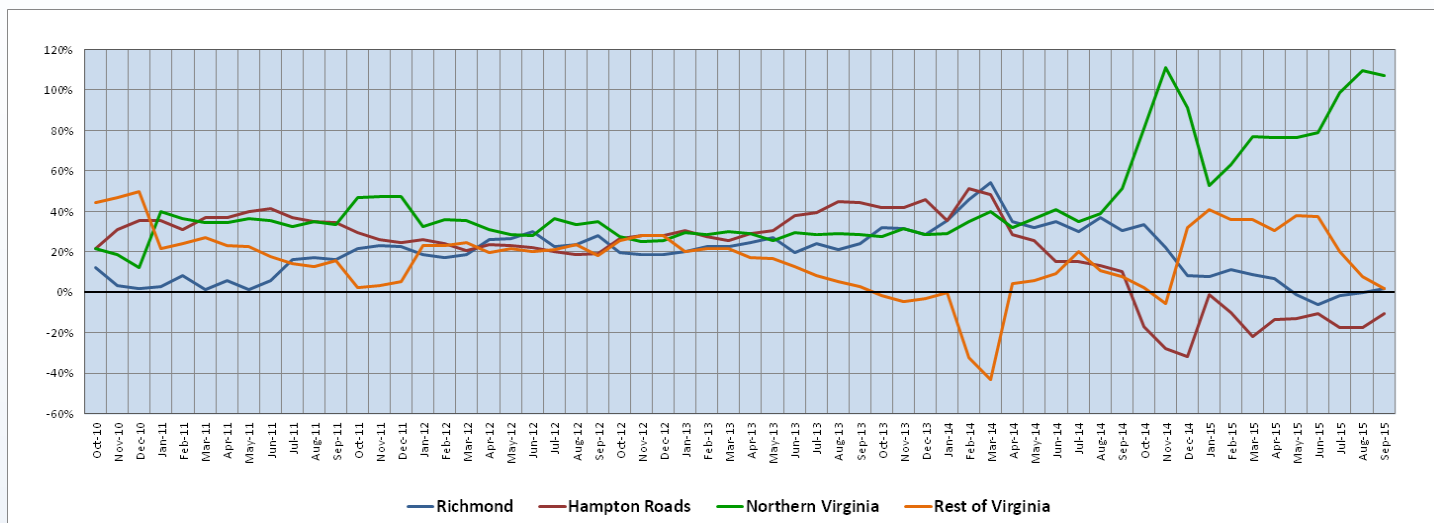
Despite losing 400 HC&SA jobs in September, Richmond's year-over-year HC&SA employment growth rate crossed into positive territory for the first time since April. In fact, at its current level of 0.12%, Richmond currently sports the second-fastest growth rate among Virginia's four regions. The Rest of Virginia saw its year-over-year HC&SA employment growth rate decline to a ten-month low of 0.08%, while the corresponding growth rate for Hampton Roads has now remained negative for one full year. Only Northern Virginia currently has a non-trivial year-over-year HC&SA employment growth rate, which now rests at 5.22%. This represents the third straight month in which its growth rate has exceeded 5%.

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 second consecutive month, Northern Virginia has been responsible for more than 100% of all HC&SA employment growth over the previous 12 months, although this share did decline slightly in September to 107.0%. Much of its growth share has come at the expense of Hampton Roads, which currently has a 12-month HC&SA employment growth share of -10.5%. The other two regions in the state, Richmond and the Rest of Virginia, both currently have identical 12-month HC&SA employment growth shares at 1.8%. However, these two regions have been trending in drastically different directions. While the growth share of Richmond's HC&SA sector reached its highest value since April, the Rest of Virginia is now sporting its lowest HC&SA growth share since November 2014.

Subsector Employment Growth

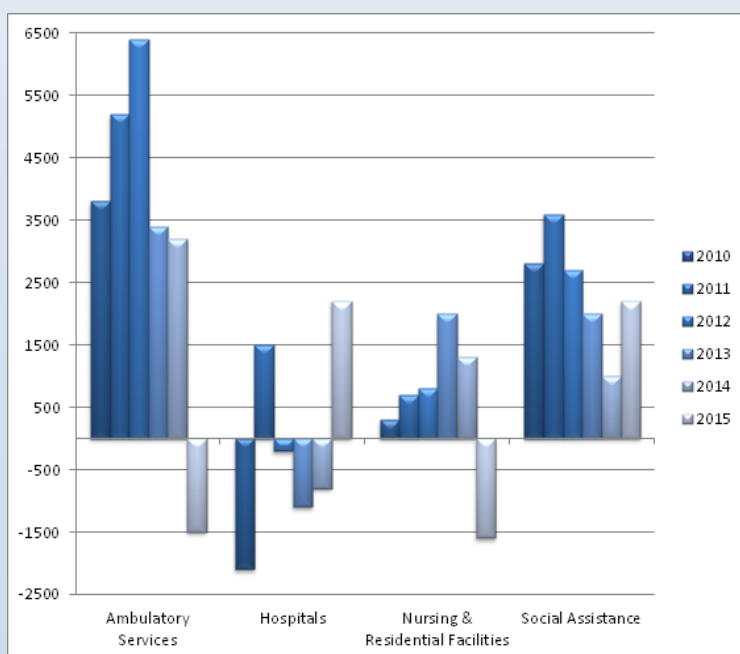


Figure 4: Annual & YTD Change in HC&SA Subsector Employment (Not Seasonally Adjusted, Dec. to Dec.)

In a month in which Virginia's HC&SA sector lost 2,300 jobs, the state's Hospitals subsector actually added to its year-to-date gains with an employment increase of 1,000 in September, which represents a one-month annualized growth rate of 12.3%. So far this year, Virginia's Hospitals have created 2,200 new jobs, which ties the Social Assistance subsector as the largest contributor to the state's HC&SA workforce. The Social Assistance subsector, on the other hand, lost 700 jobs during the month.

However, Virginia's two other HC&SA subsectors, Ambulatory Health Care Services and Nursing & Residential Care Facilities, experienced even worse jobs losses in September. One month after losing 1,400 HC&SA jobs, Ambulatory Health Care Services followed it up with an even bigger employment decline of 1,800 in September. Meanwhile, Nursing & Residential Care Facilities experienced its worst monthly employment decline since February after losing 800 jobs during the month. Combined, these two HC&SA subsectors have lost 3,100 jobs so far in 2015.

Distribution of Growth by Subsector

Not Seasonally Adjusted	Employment, in Thousands				Growth Rate, Annualized		
	Sept. 2015	June 2015	Aug. 2015	Sept. 2015	12 Month	3 Month	1 Month
Virginia							
Health Care & Social Assistance	408.2	415.1	416.2	413.9	1.4%	-1.2%	-6.4%
<i>Ambulatory Health Care Services</i>	161.8	165.5	165.2	163.4	1.0%	-5.0%	-12.3%
<i>Hospitals</i>	101.4	102.8	103.3	104.3	2.9%	6.0%	12.3%
<i>Nursing & Residential Care Facilities</i>	73.0	73.0	73.1	72.3	-1.0%	-3.8%	-12.4%
<i>Social Assistance</i>	72.0	73.8	74.6	73.9	2.6%	0.5%	-10.7%
Virginia Beach, Norfolk, Newport News							
Health Care & Social Assistance	87.2	86.4	86.4	86.6	-0.7%	0.9%	2.8%
<i>Hospitals</i>	21.6	21.5	21.6	21.7	0.5%	3.8%	5.7%
Northern Virginia							
Health Care & Social Assistance	116.8	122.4	124.1	122.9	5.2%	1.6%	-11.0%
<i>Ambulatory Health Care Services</i>	54.1	56.2	57.2	56.5	4.4%	2.2%	-13.7%
<i>Hospitals</i>	23.3	24.1	24.4	24.4	4.7%	5.1%	0.0%

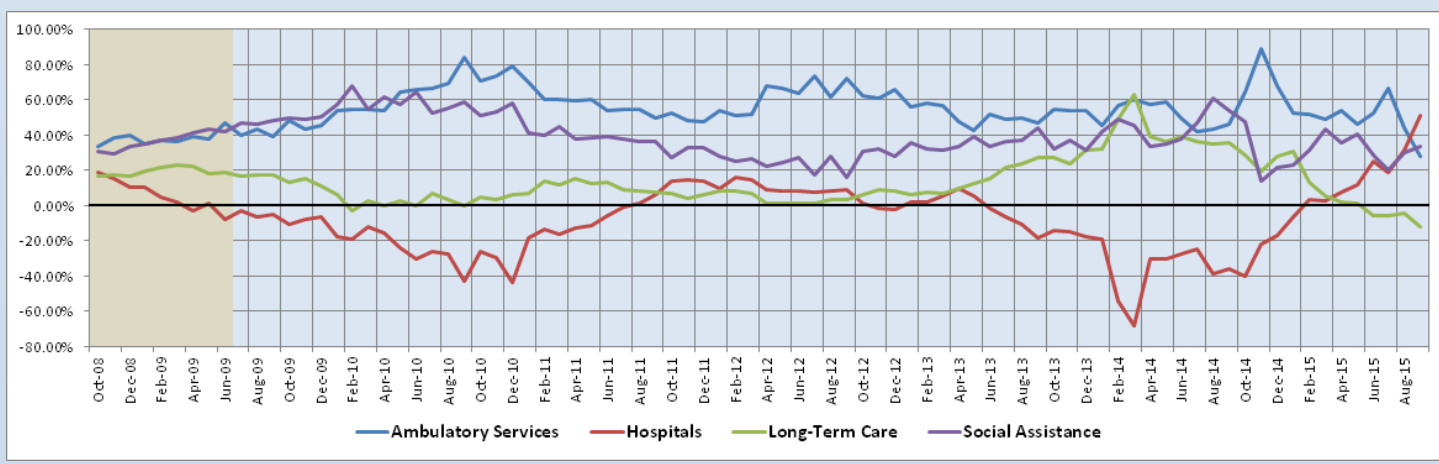
Preliminary estimates are italicized

Virginia's Hospitals currently have a 12-month employment growth rate of 2.9%, which is more than double the corresponding growth rate for the state's HC&SA sector as a whole. The Social Assistance subsector is also sporting an above-average 12-month employment growth rate of 2.6%. These are also the only two HC&SA subsectors in the state that currently have positive three-month annualized employment growth rates as well. The short-term employment growth of Virginia's Hospitals have been particularly impressive as of late, especially considering the lack of short-term growth in Virginia's overall HC&SA sector.

Share of 12-Month Growth by Subsector

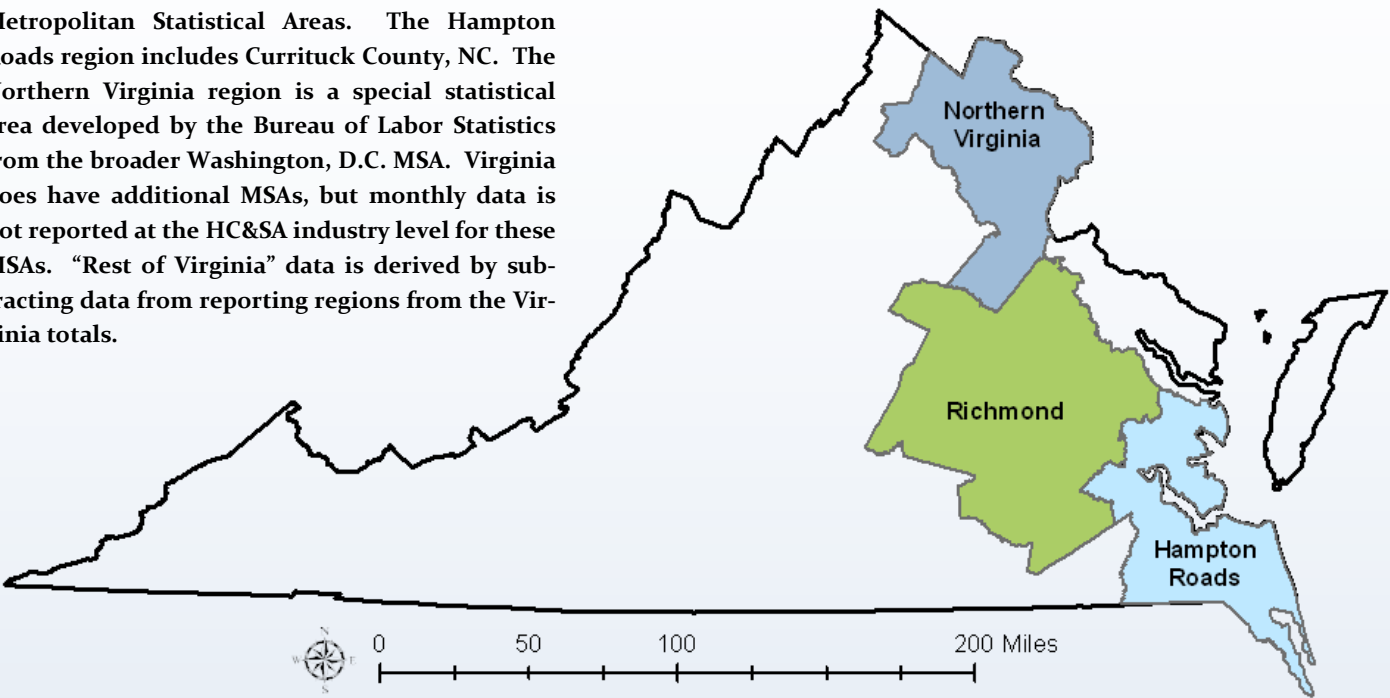
At the beginning of 2015, Virginia's Hospitals had a negative 12-month employment growth share, but after September's gain of 1,000 jobs, this subsector is now responsible for just over half of all HC&SA employment growth in the state over the past 12 months, reaching a threshold that it had not exceeded in more than a decade. Much of this growth has come from the Nursing & Residential Care Facilities subsector, whose 12-month employment growth share fell to a decade-long low of -12.3%. Ambulatory Health Care Services has seen a significant drop in its 12-month employment growth share as well, which has also reached a decade-long low in September after falling to 28.1% 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		Richmond		Hampton Roads	
Northern VA, (Non-standard CES Area 94783)		Richmond, VA (MSA 40060)		Virginia Beach-Norfolk-Newport News, VA-NC (MSA 47260)	
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			Virginia Beach
Warren		Henrico			Williamsburg
		King & Queen		Currituck, NC	
		King William			
		Louisa			
		New Kent			
		Powhatan			
		Prince George			
		Sussex			

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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 143,000 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).