



Virginia Healthcare Workforce Briefs

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

Series 2, Issue 51

April 2016

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Data in this report are not seasonally adjusted. 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 created 600 jobs in March which represents a one-month annualized employment growth rate of 1.7%. During the first quarter of 2016, Virginia's HC&A sector added 400 new jobs to the state's economy.
- ◆ The Rest of Virginia created 900 HC&SA jobs in March, while Northern Virginia was not far behind with an HC&SA employment gain of 800 jobs during the month. However these gains were attenuated by losses elsewhere in the state. Richmond's HC&SA sector lost 700 jobs, while Hampton Roads saw HC&SA employment fall by 400.
- ◆ Nearly all of March's HC&SA employment growth came from the Ambulatory Health Care Services subsector, which added 1,300 jobs in March. Nursing & Residential Care Facilities also created jobs during the month, although its gain amounted to just 100 new HC&SA jobs.

Data in Brief

Not Seasonally Adjusted*	Employment, in Thousands				Growth Rate, Annualized		
	Mar. 2015	Dec. 2015	Feb. 2016	Mar. 2016	12 Month	3 Month	1 Month
Virginia							
Total Nonfarm	3,780.0	3,926.6	3,861.4	3,888.5	2.9%	-3.8%	8.8%
Health Care & Social Assistance	413.1	428.2	428.0	428.6	3.8%	0.4%	1.7%
Hampton Roads							
Total Nonfarm	752.3	772.0	753.0	763.1	1.4%	-4.5%	17.3%
Health Care & Social Assistance	88.0	93.0	92.6	92.2	4.8%	-3.4%	-5.1%
Northern Virginia							
Total Nonfarm	1,375.0	1,421.7	1,406.7	1,417.4	3.1%	-1.2%	9.5%
Health Care & Social Assistance	118.6	121.5	121.9	122.7	3.5%	4.0%	8.2%
Richmond							
Total Nonfarm	636.7	670.5	662.5	665.1	4.5%	-3.2%	4.8%
Health Care & Social Assistance	81.2	83.2	83.6	82.9	2.1%	-1.4%	-9.6%
Rest of Virginia							
Total Nonfarm	1,016.0	1,062.4	1,039.2	1,042.9	2.6%	-7.1%	4.4%
Health Care & Social Assistance	125.3	130.5	129.9	130.8	4.4%	0.9%	8.6%

Preliminary estimates are italicized

*Seasonally adjusted data are 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 have been seasonally adjusted.

Regional HC&SA Employment Growth, Level

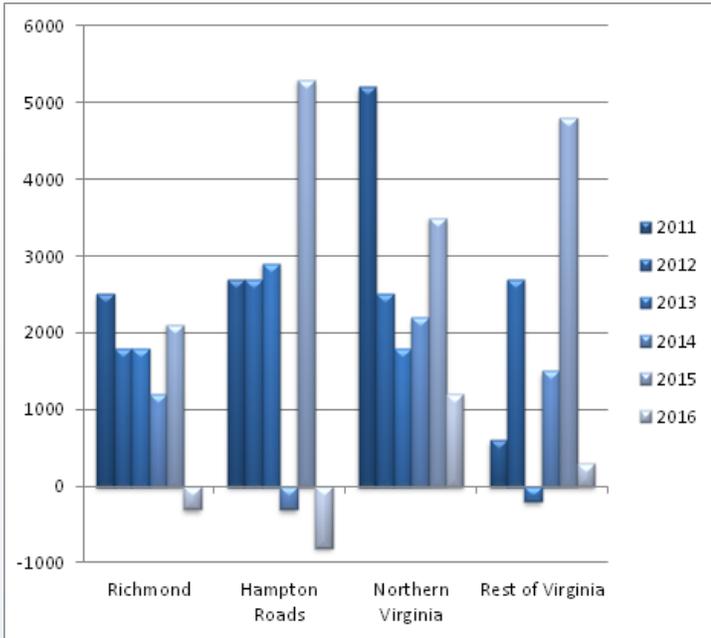


Figure 1: Annual Change in HC&SA Employment (Not Seasonally Adjusted, Full-Year Change for 2010-2014, Jan. to Nov. for 2015).

According to preliminary data released on Friday, April 15, 2016 by the U.S. Department of Labor, Bureau of Labor Statistics, Virginia’s Health Care & Social Assistance (HC&SA) sector created 600 jobs in March; this is in addition to the 1,500 jobs created in February. Thanks to these employment gains over the past two months, the state’s HC&SA sector has been able to completely erase all of its employment losses from January.

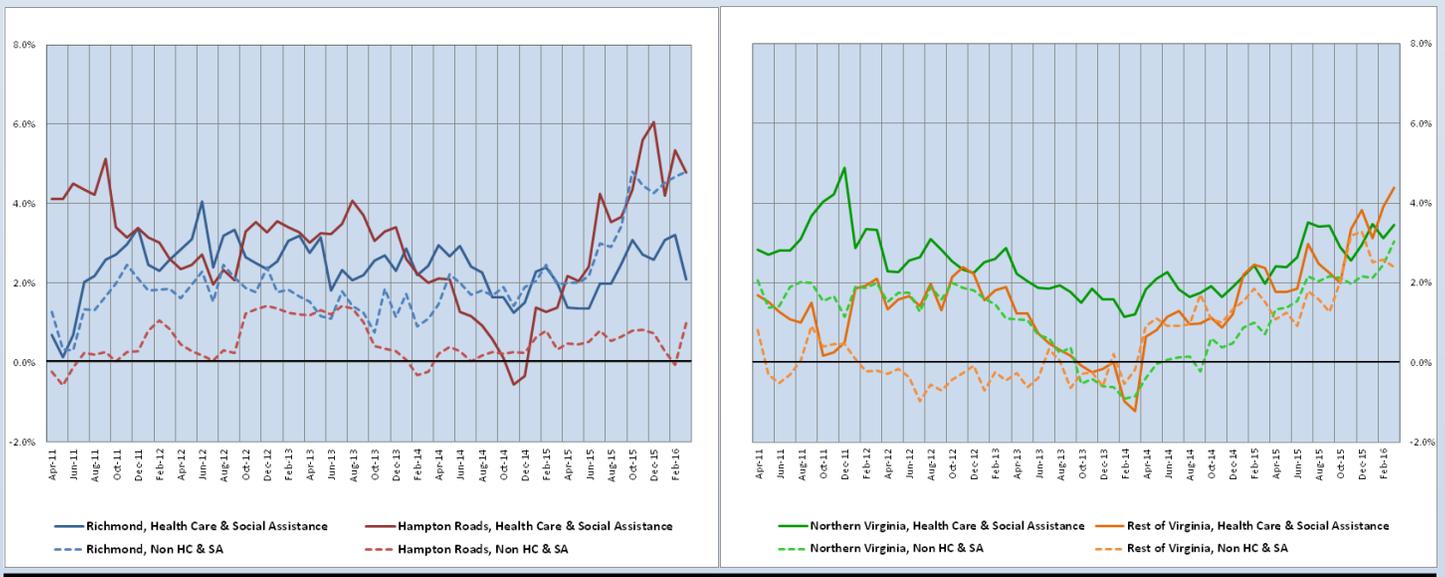
The Rest of Virginia increased HC&SA employment the most in March with the creation of 900 jobs, while Northern Virginia’s HC&SA sector was close behind with the addition of 800 new jobs. On the other hand, Richmond saw HC&SA employment fall by 700 in March, and Hampton Roads lost 400 jobs in the HC&SA sector during the month.

During the first quarter of 2016, Virginia’s HC&SA sector created 400 jobs. Northern Virginia is the most significant contributor to this growth, adding 1,200 HC&SA jobs over the past three months. The Rest of Virginia is the only other region to have added HC&SA jobs in the quarter.

Year-Over-Year Regional Employment Growth

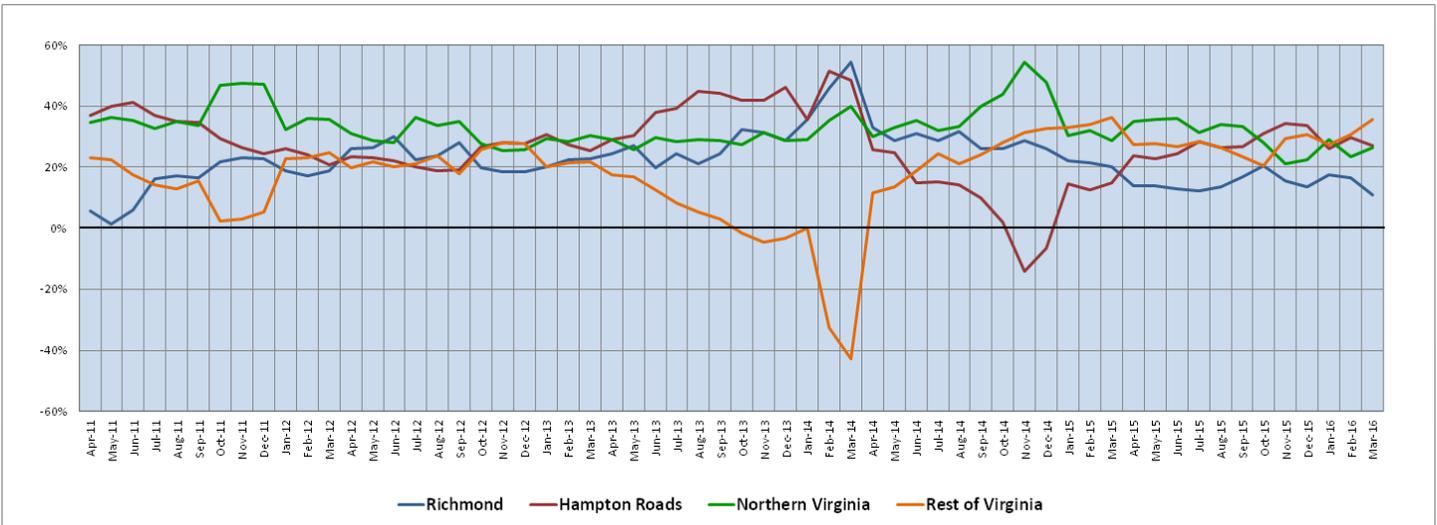
Hampton Roads currently has the fastest year-over-year HC&SA employment growth rate at 4.77%, although this growth rate is down from 5.35% in February. In fact, Hampton Roads now has the fastest year-over-year HC&SA employment growth rate for nine consecutive months. However, the Rest of Virginia is not far behind as its year-over-year HC&SA employment growth rate increased from 3.92% to 4.39% in March. Northern Virginia also saw an increase in its year-over-year HC&SA employment growth rate during the month from 3.13% to 3.46%, nearly reaching a five-year high. Meanwhile, Richmond’s HC&SA sector saw its year-over-year employment growth rate fall from 3.21% to a seven-month low of 2.09%.

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.



At the moment, the Rest of Virginia is the highest contributor to the state’s HC&SA employment growth over the past 12 months. In March, the Rest of Virginia’s 12-month HC&SA employment growth share increased from 30.82% to 35.48%, which represents a one-year high. Hampton Roads remains the second most important contributor to the state’s HC&SA employment growth with a 12-month growth share of 27.10%, while Northern Virginia’s 12-month HC&SA employment growth share is not far behind at 26.45%. Meanwhile, Richmond’s HC&SA sector continues to lag behind the other regions in the state. Richmond’s 12-month HC&SA employment growth share fell from 16.35% to 10.97% in March. This represents the lowest 12-month growth share for Richmond’s HC&SA sector since June 2011.

Subsector Employment Growth

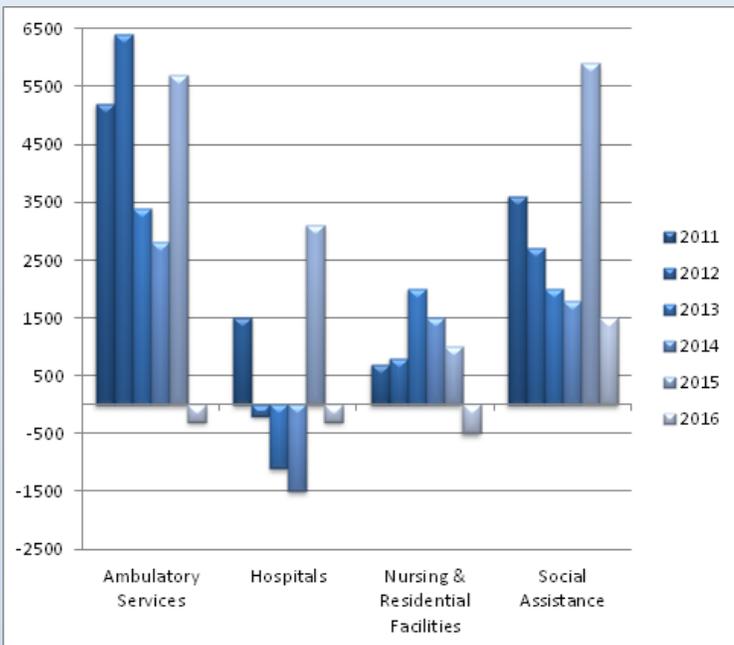


Figure 4: Annual & YTD Change in HC&SA Subsector Employment (Not Seasonally Adjusted, Full-Year Change for 2010-2015).

Ambulatory Health Care Services was by far the most significant contributor to the state’s HC&SA employment growth in March. This subsector created 1,300 jobs during the month. Nursing & Residential Care Facilities was the only other HC&SA subsector that created jobs in March, although it only produced 100 new jobs during the month. Meanwhile, the Social Assistance subsector gave back most of its employment gains in February after shedding 600 HC&SA jobs in March. As for Virginia’s Hospitals, this subsector saw employment fall by 200 during the month.

During the first quarter of 2016, Social Assistance was the only HC&SA subsector in the state that created jobs. However, its impressive contribution of 1,500 new jobs more than offset the losses elsewhere in the HC&SA sector. Nursing & Residential Care Facilities lost 500 jobs in Q1 2016, the largest loss of any HC&SA subsector in the state. Meanwhile, both Ambulatory Health Care Services and Hospitals saw their HC&SA employment fall by 300 jobs during the quarter.

Distribution of Growth by Subsector

Not Seasonally Adjusted	Employment, in Thousands				Growth Rate, Annualized		
	Mar. 2015	Dec. 2015	Feb. 2016	Mar. 2016	12 Month	3 Month	1 Month
Virginia							
Health Care & Social Assistance	413.1	428.2	428.0	428.6	3.8%	0.4%	1.7%
<i>Ambulatory Health Care Services</i>	163.5	170.2	168.6	169.9	3.9%	-0.7%	9.7%
<i>Hospitals</i>	101.9	104.5	104.4	104.2	2.3%	-1.1%	-2.3%
<i>Nursing & Residential Care Facilities</i>	73.5	75.1	74.5	74.6	1.5%	-2.6%	1.6%
<i>Social Assistance</i>	74.2	78.4	80.5	79.9	7.7%	7.9%	-8.6%
Hampton Roads							
Health Care & Social Assistance	88.0	93.0	92.6	92.2	4.8%	-3.4%	-5.1%
<i>Hospitals</i>	21.5	22.5	22.4	22.3	3.7%	-3.5%	-5.2%
Northern Virginia							
Health Care & Social Assistance	118.6	121.5	121.9	122.7	3.5%	4.0%	8.2%
<i>Ambulatory Health Care Services</i>	54.9	56.7	56.3	57.3	4.4%	4.3%	23.5%
<i>Hospitals</i>	23.5	23.5	23.8	23.8	1.3%	5.2%	0.0%

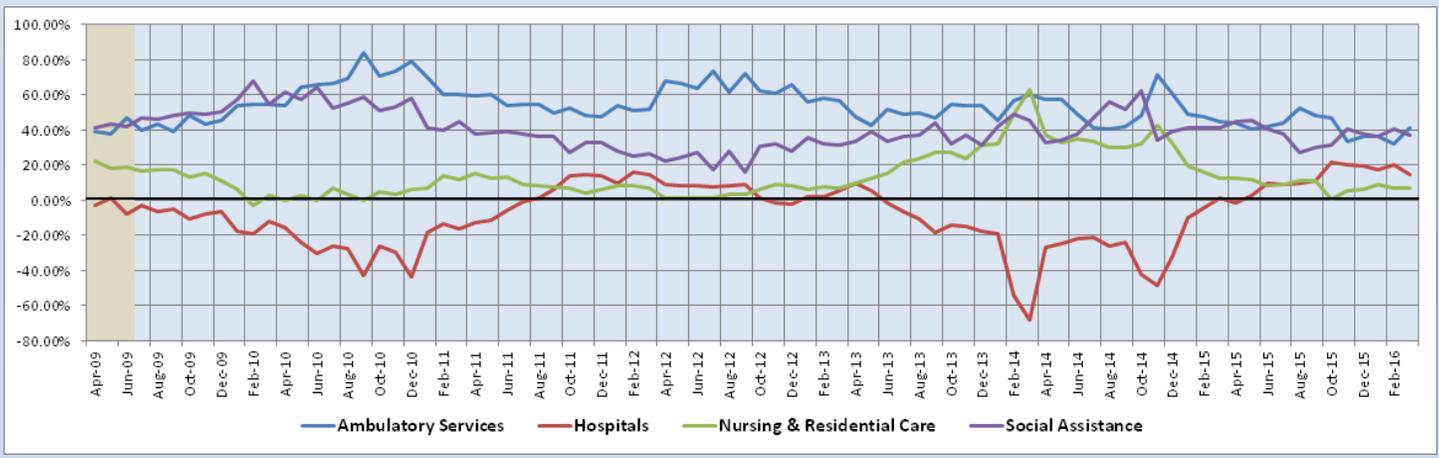
Preliminary estimates are italicized

With its 1,300 new jobs added in March, Ambulatory Health Care Services enjoyed an impressive one-month annualized employment growth rate of 9.7%. Thanks to this growth, its 12-month employment growth rate increased to 3.9%, which is just above the 3.8% average growth rate for the overall HC&SA sector in Virginia. Social Assistance continues to enjoy the fastest 12-month employment growth rate in the state at 7.7%, although its long-term growth was hurt somewhat by its weak performance in March. The Hospitals subsector has struggled to produce any job growth in the past three months, but its long-term performance is more positive with a 12-month employment growth rate of 2.3%.

Share of 12-Month Growth by Subsector

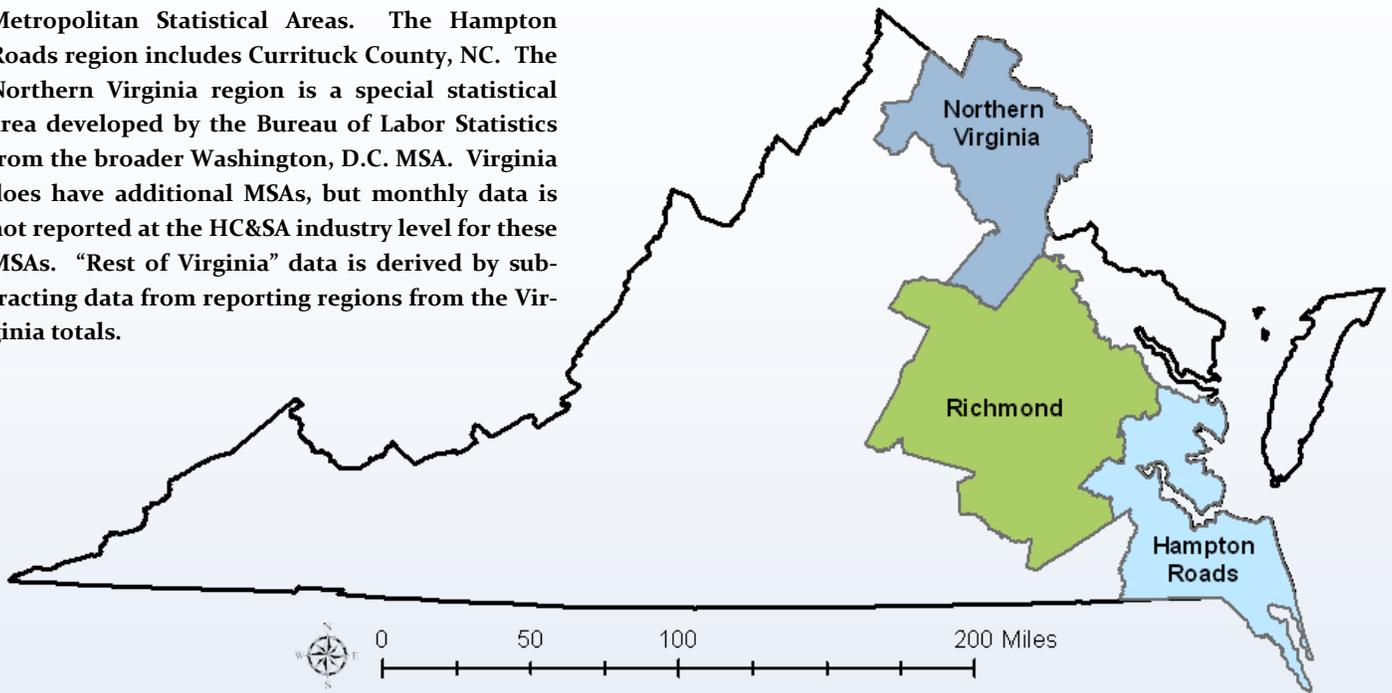
After its strong job growth in March, Ambulatory Health Care Services now has the highest 12-month HC&SA employment growth share of any subsector in the state. During the month, its growth share increased from 32.08% to a five-month high of 41.29%. On the other hand, Virginia's Social Assistance subsector saw its 12-month HC&SA employment growth share decline from 40.88% to 36.77% during the month. Together, these two HC&SA subsector have been responsible for more than three-quarters of all HC&SA employment growth over the past year. The 12-month growth share of Virginia's Hospitals fell to 14.84%, while the corresponding growth share of Nursing & Residential Care Facilities increased to 7.10%.

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			Virginia Beach
Warren		Henrico		<i>Currituck, NC</i>	Williamsburg
		King & Queen			
		King William			
		Louisa			
		New Kent			
		Powhatan			
		Prince George			
		Sussex			

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About the Data

Data in this report are 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 are 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).
- ◆ 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)