



Virginia Healthcare Workforce Briefs

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

Series 2, Issue 57

December 2016

Inside this Brief:

Regional Employment Growth	2
Regional HC&SA Share	3
Subsector Employment Growth	3
Subsector HC&SA Share	4
Region Map	5
About the Data	6

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 are not seasonally adjusted and exhibit short-term volatility from fluctuations in holidays, weekends, weather and other seasonal factors. Estimates for the most recent month are preliminary.
- ◆ For the third time in the past four months, Virginia's Health Care & Social Assistance (HC&SA) sector lost jobs. In November, employment in Virginia's HC&SA sector fell by 1,100, which represents a one-month annualized growth rate of -3.0%. So far in 2016, Virginia's HC&SA sector has created 4,700 new jobs across the state.
- ◆ Richmond was the only region in the state to experience positive HC&SA employment growth in November. In fact, Richmond's HC&SA sector has now created jobs in each of the past four months. However, the creation of 700 HC&SA jobs in Richmond could not overcome the losses in Northern Virginia and Hampton Roads.
- ◆ Both Virginia's Social Assistance and Hospital subsectors increased HC&SA employment in November. Employment in the Social Assistance subsector increased by 300 jobs, while Virginia's Hospitals created 200 new jobs. However, Ambulatory Health Care Services and Nursing & Residential Care Services lost a total of 1,600 jobs.

Data in Brief

Not Seasonally Adjusted*	Employment, in Thousands				Growth Rate, Annualized		
	Nov. 2015	Aug. 2016	Oct. 2016	Nov. 2016	12 Month	3 Month	1 Month
Virginia							
Total Nonfarm	3,927.6	3,927.4	3,966.1	3,965.5	1.0%	3.9%	-0.2%
Health Care & Social Assistance	425.5	433.5	434.0	432.9	1.7%	-0.6%	-3.0%
Hampton Roads							
Total Nonfarm	772.0	775.5	773.5	770.4	-0.2%	-2.6%	-4.7%
Health Care & Social Assistance	92.3	93.0	93.5	93.1	0.9%	0.4%	-5.0%
Northern Virginia							
Total Nonfarm	1,421.2	1,438.1	1,448.1	1,452.4	2.2%	4.0%	3.6%
Health Care & Social Assistance	120.6	122.6	122.8	121.4	0.7%	-3.9%	-12.9%
Richmond							
Total Nonfarm	671.3	673.2	678.2	677.1	0.9%	2.3%	-1.9%
Health Care & Social Assistance	83.2	84.8	85.3	86.0	3.4%	5.8%	10.3%
Rest of Virginia							
Total Nonfarm	1,063.1	1,040.6	1,066.3	1,065.6	0.2%	10.0%	-0.8%
Health Care & Social Assistance	129.4	133.1	132.4	132.4	2.3%	-2.1%	0.0%

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

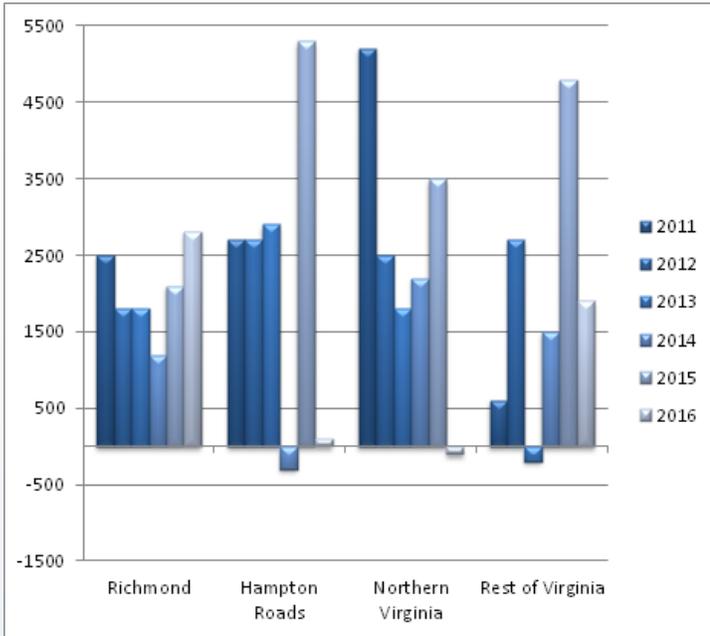


Figure 1: Annual Change in HC&SA Employment (Not Seasonally Adjusted, Full-Year Change for 2011-2015, Jan. to Aug. for 2016).

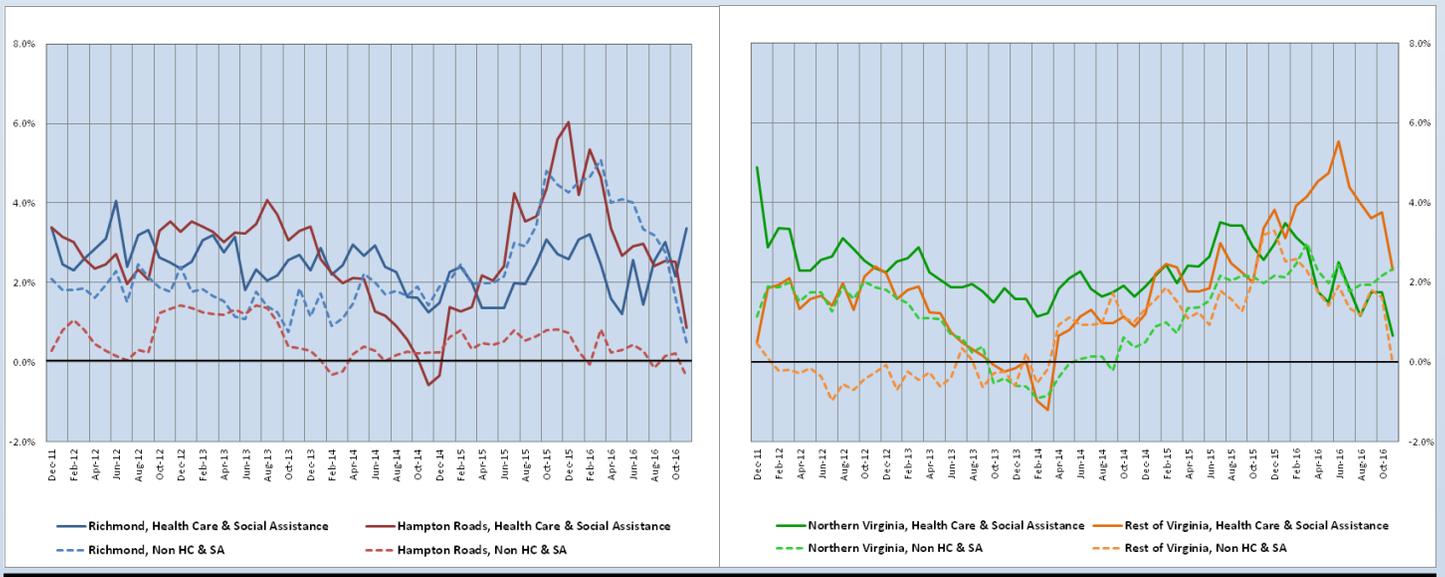
According to preliminary data released on Friday, December 16, 2016 by the U.S. Department of Labor, Bureau of Labor Statistics, Virginia’s Health Care & Social Assistance (HC&SA) sector lost 1,100 jobs in November, which represents a one-month annualized growth rate of -3.0%. Virginia’s HC&SA sector has now seen an employment decline in three of the past four months.

Despite November’s HC&SA employment losses, Richmond’s HC&SA sector was able to overcome this weakness by created 700 new jobs during the month. With this gain, employment in Richmond’s HC&SA sector has now grown in each of the past four months. During this time period, Richmond’s HC&SA sector has created 2,300 new jobs. However, the employment strength in Richmond was overshadowed by the loss of 1,400 jobs in Northern Virginia’s HC&SA sector in November as well as the loss of 400 HC&SA jobs in Hampton Roads during the month. As for the Rest of Virginia, its HC&SA sector experienced no change in employment in November.

Year-Over-Year Regional Employment Growth

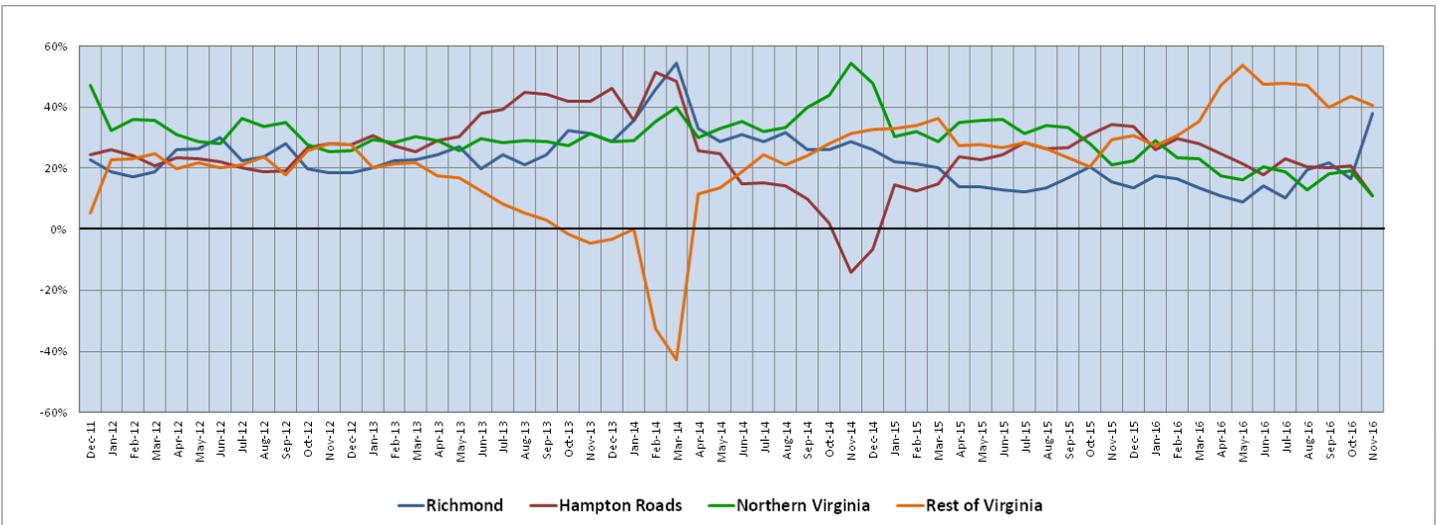
Thanks to Richmond’s strong HC&SA jobs gains in November, its year-over-year HC&SA employment growth rate increased from 2.16% to 3.37%, reaching its highest value since June 2012. However, while Richmond’s HC&SA sector has been showing recent signs of strength, year-over-year HC&SA employment growth elsewhere in the state has weakened considerably over the past several months. In November, the year-over-year employment growth rate in both Northern Virginia and Hampton Roads fell below 1%. Year-over-year HC&SA employment growth has been more resilient in the Rest of Virginia, but its current growth rate of 2.32% is less than half of what it was only five months ago.

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.



Since the beginning of the year, Richmond has seen its 12-month HC&SA employment growth share more than double from 17.61% to 37.84%. This represents the highest value for Richmond’s 12-month HC&SA employment growth share since March 2014. However, the Rest of Virginia continues to be the single largest contributor to HC&SA employment growth in the state. The Rest of Virginia’s current 12-month HC&SA employment growth share stands at 40.54%, which is down slightly from 43.64% growth share in October. Meanwhile, both Hampton Roads and Northern Virginia experienced significant declines in their respective growth shares in November. Hampton Roads saw its 12-month HC&SA employment share fall from 20.91% to 10.81%, while Northern Virginia saw its growth share fall from 19.09% to 10.81% as well.

Subsector Employment Growth

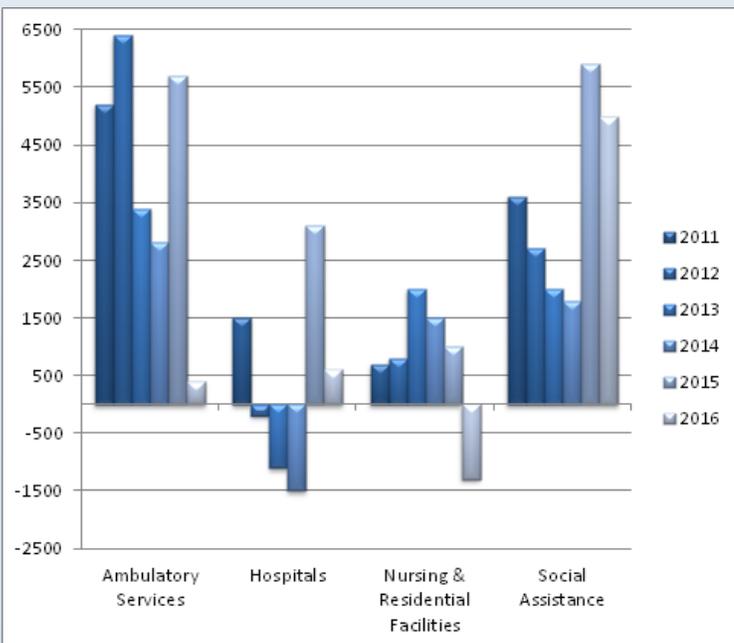


Figure 4: Annual & YTD Change in HC&SA Subsector Employment (Not Seasonally Adjusted, Full-Year Change for 2011-2015, Jan. to Aug. for 2016).

Despite the overall weakness in Virginia’s HC&SA sector in November, two of its subsectors managed to produce small employment gains during the month. Virginia’s Social Assistance subsector created 300 jobs in November, while employment in the state’s Hospitals subsector increased by 200. However, these gains did not overcome the losses in the state’s two other HC&SA subsectors. Ambulatory Health Care Services shed 900 jobs during the month, while employment declined by 700 in the state’s Nursing & Residential Care Facilities.

Nearly all of the state’s HC&SA employment in 2016 has come from its Social Assistance subsector. So far this year, this subsector has created 5,000 new jobs. At the same time, Virginia’s Hospitals have created 600 jobs in 2016, while the Ambulatory Health Care Services subsector has grown employment by just 400 new jobs. By way of comparison, this two subsectors created 3,100 and 5,700 new jobs in 2015, respectively. Meanwhile, the Nursing & Residential Care Facilities subsector has lost 1,300 jobs in 2016.

Distribution of Growth by Subsector

Not Seasonally Adjusted	Employment, in Thousands				Growth Rate, Annualized		
	Nov. 2015	Aug. 2016	Oct. 2016	Nov. 2016	12 Month	3 Month	1 Month
Virginia							
Health Care & Social Assistance	425.5	433.5	434.0	432.9	1.7%	-0.6%	-3.0%
<i>Ambulatory Health Care Services</i>	168.7	171.2	171.5	170.6	1.1%	-1.4%	-6.1%
<i>Hospitals</i>	104.0	104.3	104.9	105.1	1.1%	3.1%	2.3%
<i>Nursing & Residential Care Facilities</i>	74.4	74.5	74.5	73.8	-0.8%	-3.7%	-10.7%
<i>Social Assistance</i>	78.4	83.5	83.1	83.4	6.4%	-0.5%	4.4%
Hampton Roads							
Health Care & Social Assistance	92.3	93.0	93.5	93.1	0.9%	0.4%	-5.0%
<i>Hospitals</i>	22.4	22.6	22.7	22.7	1.3%	1.8%	0.0%
Northern Virginia							
Health Care & Social Assistance	120.6	122.6	122.8	121.4	0.7%	-3.9%	-12.9%
<i>Ambulatory Health Care Services</i>	56.2	57.2	57.8	57.7	2.7%	3.5%	-2.1%
<i>Hospitals</i>	23.5	24.7	25.0	25.1	6.8%	6.6%	4.9%

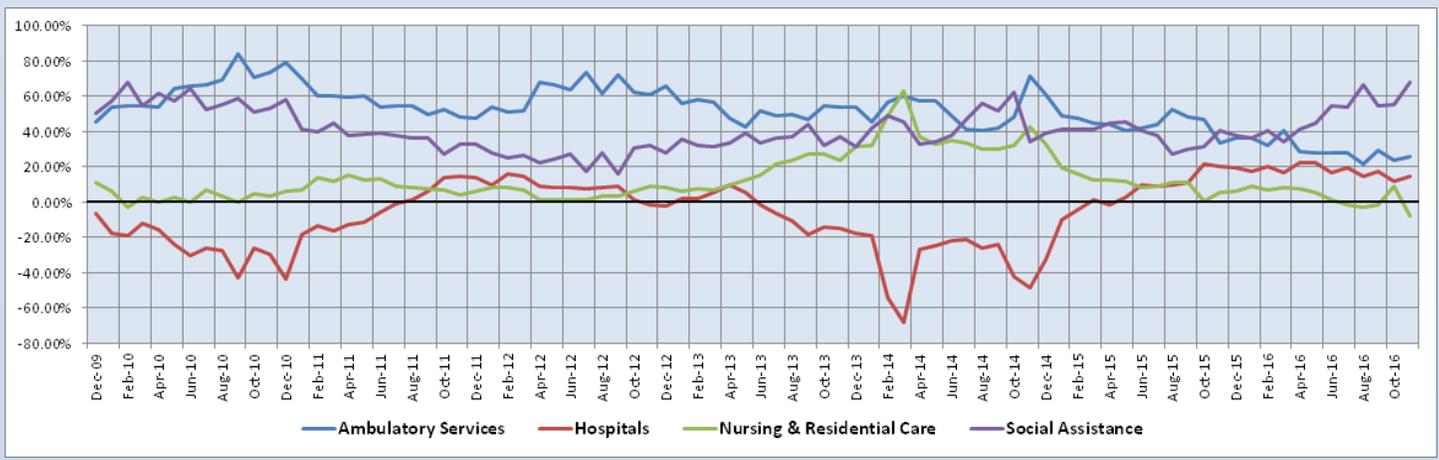
Preliminary estimates are italicized

In November, employment in Virginia’s Social Assistance subsector grew at a 4.4% annualized rate. Its 12-month employment growth rate is even more impressive at 6.4%. In fact, the Social Assistance subsector is currently the only HC&SA subsector that has grown faster than the overall statewide HC&SA employment growth rate over the past 12 months. However, both Ambulatory Health Care Services and Hospitals have still enjoyed modest 12-month employment growth. Over the past 12 months, employment in these two HC&SA subsector has grown by 1.1%. On the other hand, both short and long-term employment growth in Virginia’s Nursing & Residential Care Facilities has been nonexistent.

Share of 12-Month Growth by Subsector

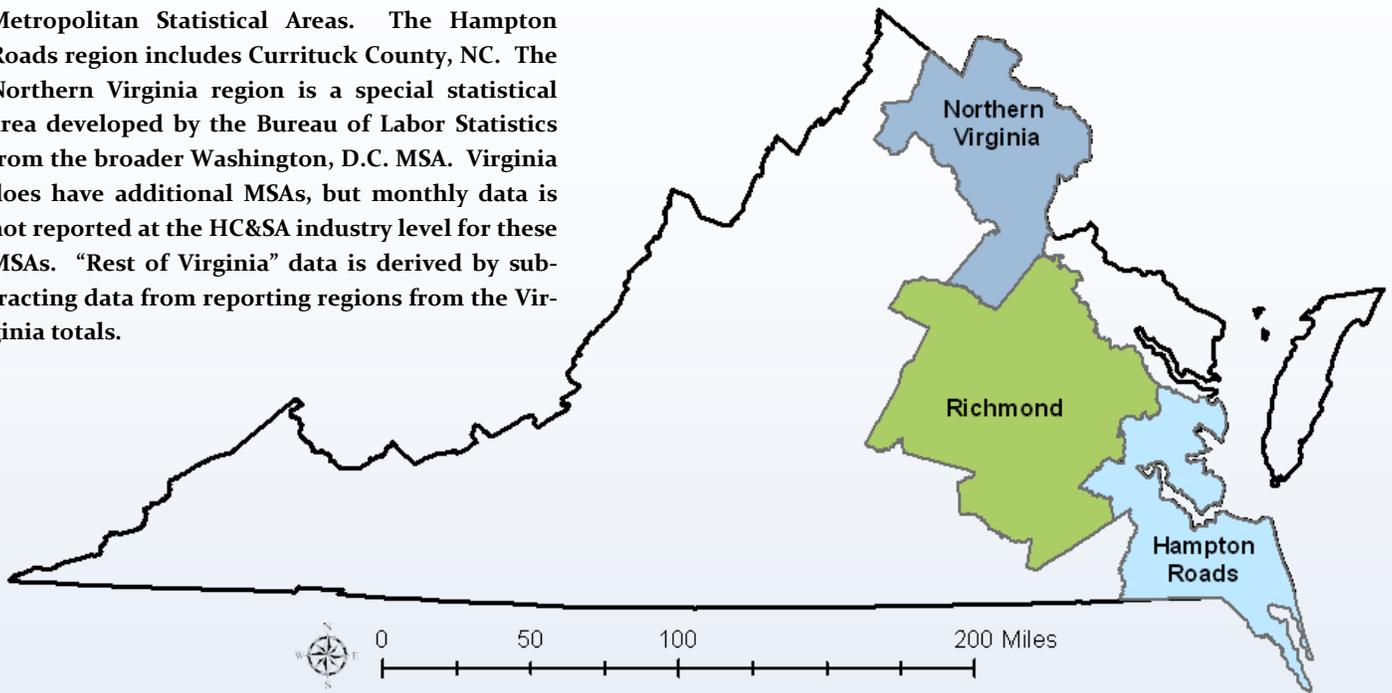
Throughout 2016, the 12-month employment growth share of Virginia’s Social Assistance subsector has been trending upward, and this tendency continued unabated in November. Over the past 12 months, Virginia’s Social Assistance subsector has been responsible for two-thirds of all employment growth in the state’s HC&SA sector. In fact, its employment growth share reached its highest value in more than six years in November. Meanwhile, Ambulatory Health Care Services has been responsible for slightly more than one-quarter of all employment growth over the past year. Virginia’s Hospitals subsector currently has a 14.86% growth share, while Nursing & Residential Care Facilities saw its growth share fall to -8.11%

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			

Healthcare Workforce
Data Center

Perimeter Center
9960 Mayland Drive, Suite 300
Henrico, VA 23233-1463

Phone: (804) 367-2115
Fax: (804) 527-4434
E-mail: hwdc@dhp.virginia.gov

www.dhp.virginia.gov/hwdc/

HWDC Staff:

Elizabeth Carter, Ph.D. <i>Executive Director</i>	Yetty Shobo, Ph.D. <i>Deputy Director</i>
Laura Jackson <i>Operations Manager</i>	Christopher Coyle <i>Research Assistant</i>

Follow us on. . .

Tumblr: <http://vahwdc.tumblr.com/>

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)