



Virginia Healthcare Workforce Briefs

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

Series 2, Issue 65

August 2017

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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 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.
- ◆ Virginia's Health Care & Social Assistance (HC&SA) sector lost 400 jobs in July, which represents a one-month annualized employment growth rate of -1.1%.
- ◆ Nearly all of Virginia's HC&SA job losses in July came from Hampton Roads, where HC&SA employment fell by 2,000 during the month. The remaining job losses came from Richmond's HC&SA sector, which shed 200 jobs in July. Meanwhile, the Rest of Virginia created 1,500 new HC&SA jobs, and employment in Northern Virginia's HC&SA sector increased by 300.
- ◆ In July, Virginia's Hospitals were the only HC&SA subsector in the state to increase employment. This subsector created 800 new jobs during the month. Meanwhile, employment in Virginia's Social Assistance subsector fell by 1,000 in July, and Ambulatory Health Care Services shed 200 jobs during the month. As for Nursing & Residential Care Services, this subsector experienced no change in employment in July.

Data in Brief

Not Seasonally Adjusted*	Employment, in Thousands				Growth Rate, Annualized		
	July 2016	Apr. 2017	June 2017	July 2017	12 Month	3 Month	1 Month
Virginia							
Total Nonfarm	3,918.4	3,954.7	4,009.4	3,988.3	1.8%	3.4%	-6.1%
Health Care & Social Assistance	436.4	440.1	443.9	443.5	1.6%	3.1%	-1.1%
Hampton Roads							
Total Nonfarm	778.1	768.6	782.6	775.3	-0.4%	3.5%	-10.6%
Health Care & Social Assistance	93.5	93.0	93.6	91.6	-2.0%	-5.9%	-22.8%
Northern Virginia							
Total Nonfarm	1,444.2	1,458.8	1,479.9	1,472.4	2.0%	3.8%	-5.9%
Health Care & Social Assistance	127.7	130.5	132.5	132.8	4.0%	7.2%	2.8%
Richmond							
Total Nonfarm	663.8	671.0	683.1	680.9	2.6%	1.3%	-3.8%
Health Care & Social Assistance	84.8	86.4	86.4	86.2	1.7%	-0.9%	-2.7%
Rest of Virginia							
Total Nonfarm	1,032.3	1,056.3	1,063.8	1,059.7	2.7%	1.3%	-4.5%
Health Care & Social Assistance	130.4	130.2	131.4	132.9	1.9%	8.6%	14.6%

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

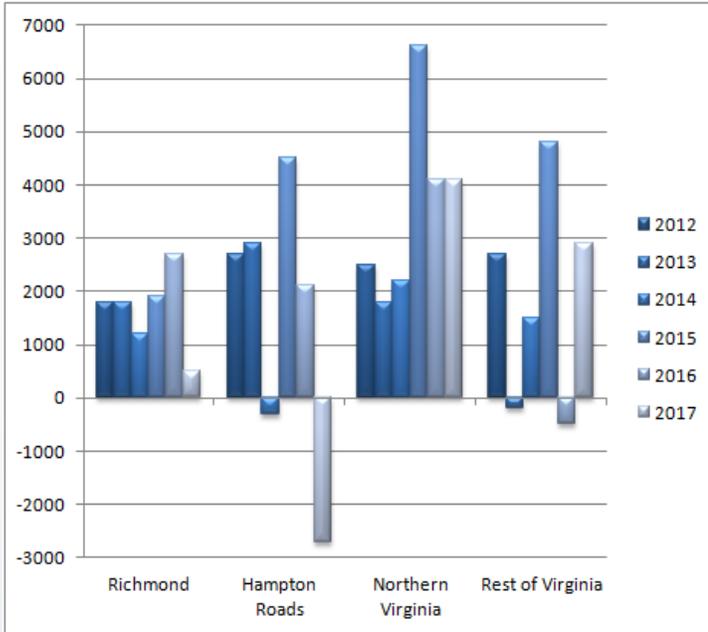


Figure 1: Annual Change in HC&SA Employment (Not Seasonally Adjusted, Full-Year Change for 2012-2016, Jan.-July for 2017).

According to preliminary data released on Friday, August 18, 2017 by the U.S. Department of Labor, Bureau of Labor Statistics, Virginia’s Health Care & Social Assistance (HC&SA) sector lost 400 jobs in June, which represents a one-month annualized employment growth rate of -1.1% .

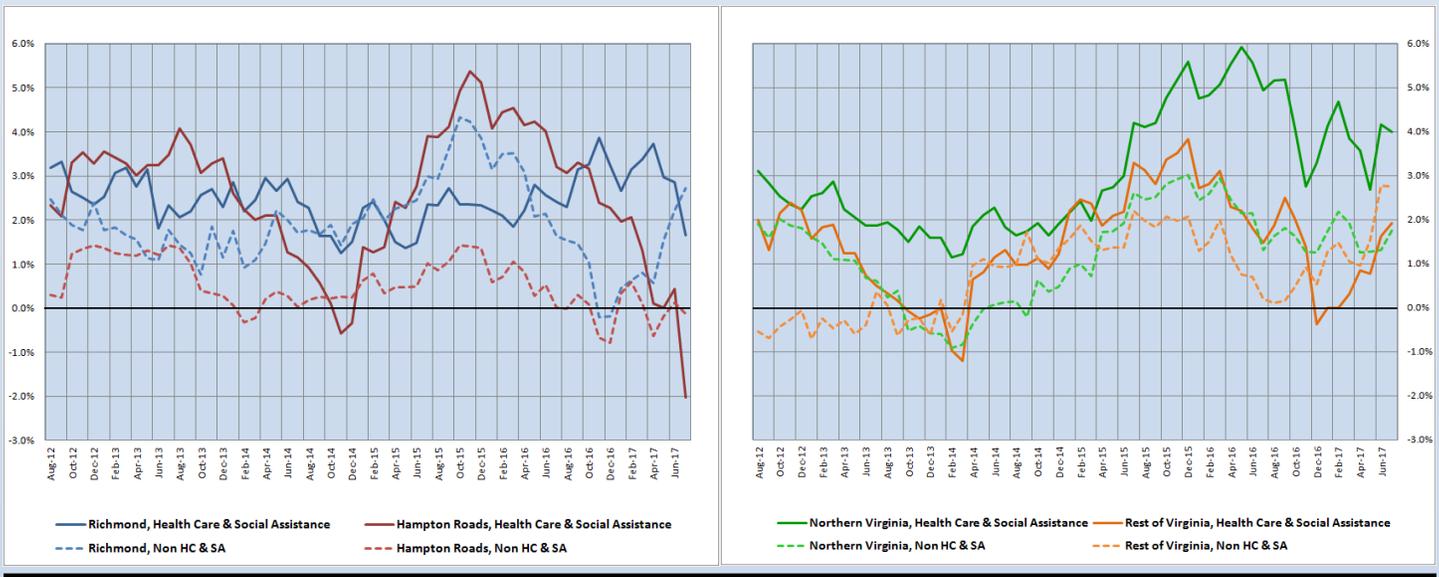
Although statewide HC&SA employment growth has been rather strong so far in 2017, that has not been the case with respect to the HC&SA sector in Hampton Roads. This weakness continued in July after Hampton Roads shed another 2,000 HC&SA jobs, which represents its worst one-month employment decline in more than a decade. With this decline, HC&SA employment in Hampton Roads has now decreased by 2,700 so far this year.

Richmond’s HC&SA sector also lost jobs in July, although its losses were rather modest relative to those of Hampton Roads. In total, this region lost 200 HC&SA jobs in July. The Rest of Virginia enjoyed its fifth consecutive month of positive HC&SA employment growth with the creation of 1,500 new jobs, while Northern Virginia added 300 HC&SA jobs.

Year-Over-Year Regional Employment Growth

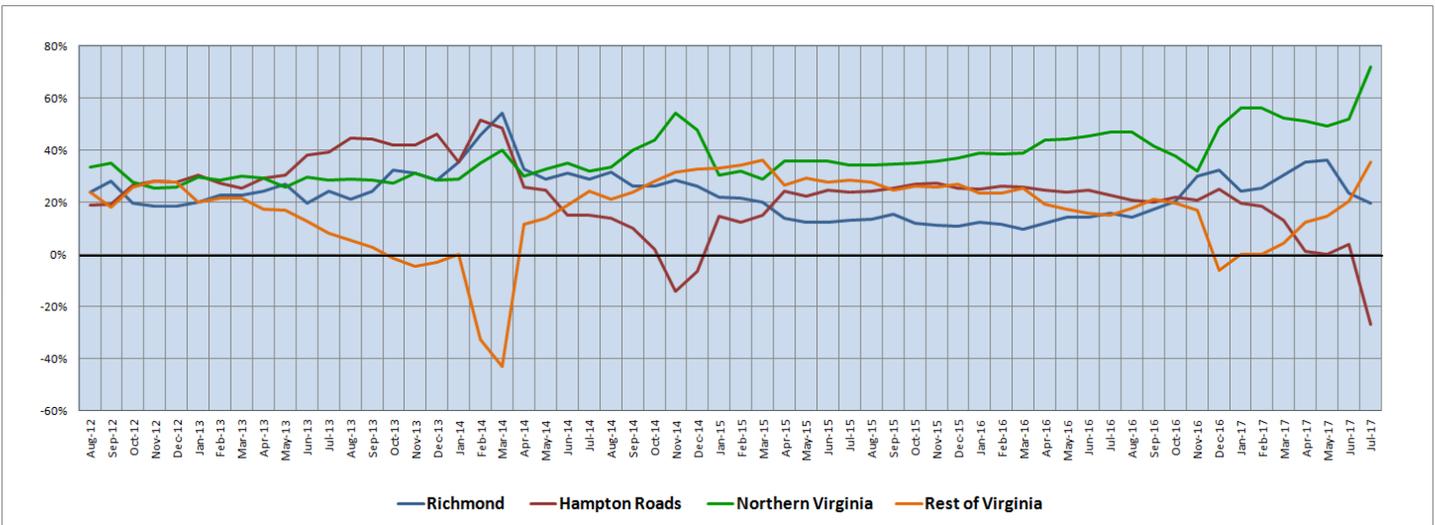
Long-term HC&SA employment growth in Hampton Roads has also exhibited considerable weakness. In July, its year-over-year HC&SA employment growth rate declined from 0.43% to -2.03% . This represents the first time since 2014 in which the year-over-year HC&SA employment growth rate in Hampton Roads has been negative. Richmond’s HC&SA sector also experienced a significant decline in its year-over-year employment growth rate in July from 2.86% to 1.65% . As for Northern Virginia, its year-over-year HC&SA employment growth rate fell modestly during the month from 4.17% to 3.99% . Only the Rest of Virginia resisted this downward trend as its year-over-year HC&SA growth rate rose from 1.62% to 1.92% .

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.



By June 2017, Northern Virginia’s HC&SA sector had been responsible for just over half of all statewide HC&SA employment growth over the previous 12 months. In July, its 12-month HC&SA employment growth share jumped up to 71.83%. Much of this increase in its HC&SA employment growth share came at the expense of Hampton Roads, which saw its 12-month HC&SA employment growth share fall in July from 3.92% to -26.76%. Richmond also experienced a small decline in its 12-month HC&SA employment growth share from 23.53% to a ten-month low of 19.72%. On the other hand, the Rest of Virginia saw its 12-month HC&SA employment growth share increase from 20.59% to 35.21% during the month. This represents the highest 12-month employment growth share in the Rest of Virginia’s HC&SA sector in more than two years.

Subsector Employment Growth

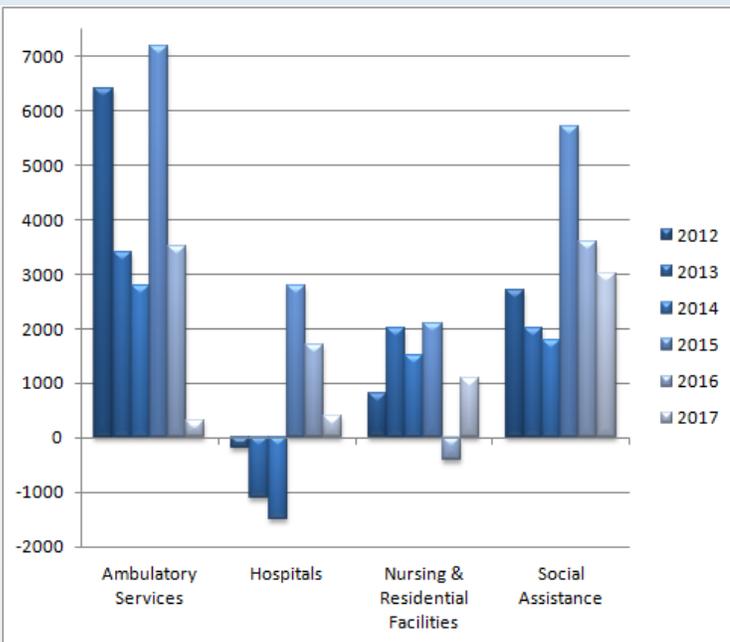


Figure 4: Annual & YTD Change in HC&SA Subsector Employment (Not Seasonally Adjusted, Full-Year Change for 2012-2016, Jan.-July for 2017).

After creating 3,500 new HC&SA jobs in May and June, Virginia’s Social Assistance subsector slowed down in July as employment in this subsector fell by 1,000 during the month. Despite this decline, Virginia’s Social Assistance subsector has still added 3,000 HC&SA jobs to the state’s economy so far this year, a total that exceeds the year-to-date job gains in the other three HC&SA subsectors combined.

However, most of these job losses were recovered by Virginia’s Hospitals, which created 800 jobs in July. In fact, this represents the largest one-month employment gain in Virginia’s Hospitals since December 2015. Regardless, this HC&SA subsector has only created 400 new jobs so far this year. Only Ambulatory Health Care Services has made a smaller contribution to year-to-date HC&SA employment gains. After losing 200 jobs in July, this subsector has now added a total of 300 HC&SA jobs in 2017. As for Nursing & Residential Care Facilities, this subsector saw no change in employment in July. It has created 1,100 jobs so far in 2017.

Distribution of Growth by Subsector

Not Seasonally Adjusted	Employment, in Thousands				Growth Rate, Annualized		
	July 2016	Apr. 2017	June 2017	July 2017	12 Month	3 Month	1 Month
Virginia							
Health Care & Social Assistance	436.4	440.1	443.9	443.5	1.6%	3.1%	-1.1%
<i>Ambulatory Health Care Services</i>	173.8	175.7	175.7	175.5	1.0%	-0.5%	-1.4%
<i>Hospitals</i>	105.1	105.3	105.5	106.3	1.1%	3.9%	9.5%
<i>Nursing & Residential Care Facilities</i>	76.4	76.8	76.9	76.9	0.7%	0.5%	0.0%
<i>Social Assistance</i>	81.1	82.3	85.8	84.8	4.6%	12.7%	-13.1%
Hampton Roads							
Health Care & Social Assistance	93.5	93.0	93.6	91.6	-2.0%	-5.9%	-22.8%
<i>Hospitals</i>	22.4	22.5	22.5	22.6	0.9%	1.8%	5.5%
Northern Virginia							
Health Care & Social Assistance	127.7	130.5	132.5	132.8	4.0%	7.2%	2.8%
<i>Ambulatory Health Care Services</i>	59.9	61.7	62.9	63.4	5.8%	11.5%	10.0%
<i>Hospitals</i>	24.6	24.7	24.8	24.4	-0.8%	-4.8%	-17.7%

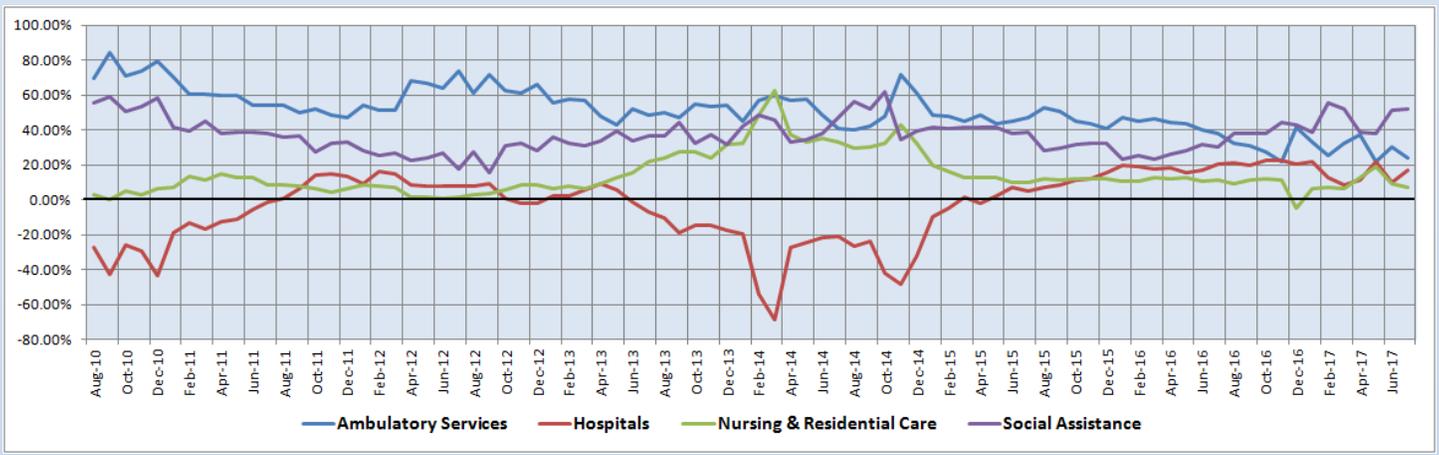
Preliminary estimates are italicized

Although employment in Virginia’s Hospitals has only grown by 1.1% over the past year, its short-term employment growth has been considerably more impressive. The 800 HC&SA jobs that this subsector created in July translates into a one-month annualized employment growth rate of 9.5%. In addition, its current three-month annualized employment growth rate stands at 3.9%, which is above the statewide HC&SA average of 3.1%. Only Virginia’s Social Assistance sector has sported a more impressive three-month annualized growth rate. Even after losing 1,000 jobs in July, employment in this subsector has still grown at a 12.7% annualized rate over the past three months.

Share of 12-Month Growth by Subsector

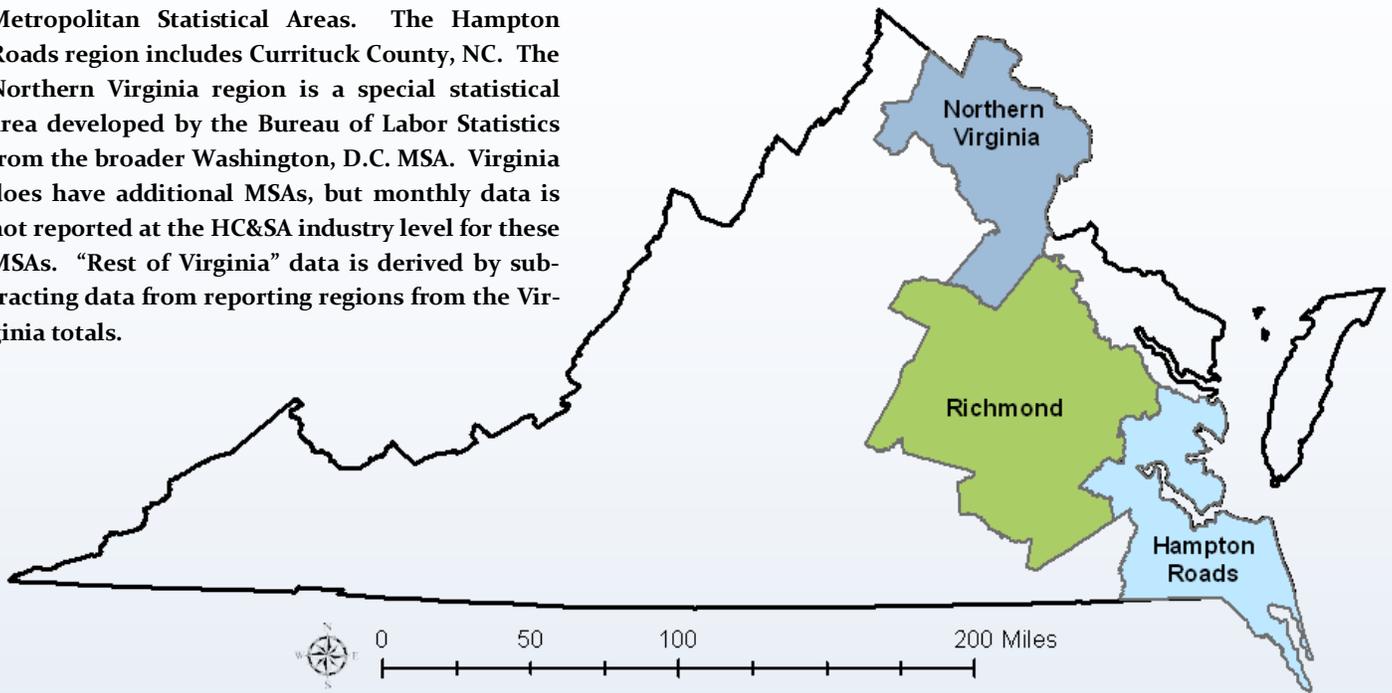
Despite July’s employment losses, Virginia’s Social Assistance subsector actually experienced a small uptick in its 12-month HC&SA employment growth share during the month from 50.98% to 52.11%. As for Virginia’s Hospitals, its strong employment gains in June helped to increase its 12-month HC&SA employment growth share from 9.80% to 16.90%. However, Virginia’s other two HC&SA subsectors saw their 12-month HC&SA employment growth shares decline in July. Ambulatory Health Care Services experienced the largest decline as its 12-month HC&SA employment growth share fell from 30.39% to 23.94%, while Nursing & Residential Care Facilities saw a more modest decline in its growth share from 8.82% to 7.04%.

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			Williamsburg
		King & Queen		<i>Currituck, NC</i>	
		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)