



Virginia Healthcare Workforce Briefs

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

Series 2, Issue 64

July 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 created 2,200 new jobs in May, which represents a one-month annualized employment growth rate of 6.1%.
- ◆ All of Virginia's HC&SA employment growth in June took place in just two regions of the state: The Rest of Virginia and Northern Virginia. The Rest of Virginia created 1,600 HC&SA jobs in June, while employment in Northern Virginia's HC&SA sector increased by 1,500. However, these gains were mitigated by the loss of 600 HC&SA jobs in Richmond and by the loss of 300 HC&SA jobs in Hampton Roads.
- ◆ Likewise, HC&SA employment growth in the state was concentrated in just two subsectors: Ambulatory Health Care Services and Social Assistance. Ambulatory Health Care Services created 1,500 jobs in June, while the Social Assistance subsector created 1,400 jobs of its own. Virginia's Hospitals saw no change in employment in June, but the state's Nursing & Residential Care Facilities subsector lost 700 jobs.

Data in Brief

| Not Seasonally Adjusted* | Employment, in Thousands | | | | Growth Rate, Annualized | | |
|---------------------------------|--------------------------|-----------|----------|-----------|-------------------------|---------|---------|
| | June 2016 | Mar. 2017 | May 2017 | June 2017 | 12 Month | 3 Month | 1 Month |
| Virginia | | | | | | | |
| Total Nonfarm | 3,942.9 | 3,925.5 | 3,970.1 | 4,003.3 | 1.5% | 8.2% | 10.5% |
| Health Care & Social Assistance | 433.7 | 437.7 | 441.6 | 443.8 | 2.3% | 5.7% | 6.1% |
| Hampton Roads | | | | | | | |
| Total Nonfarm | 781.3 | 765.2 | 772.4 | 780.4 | -0.1% | 8.2% | 13.2% |
| Health Care & Social Assistance | 93.2 | 93.2 | 93.4 | 93.1 | -0.1% | -0.4% | -3.8% |
| Northern Virginia | | | | | | | |
| Total Nonfarm | 1,457.3 | 1,447.5 | 1,465.9 | 1,476.4 | 1.3% | 8.2% | 8.9% |
| Health Care & Social Assistance | 127.2 | 129.4 | 130.6 | 132.1 | 3.9% | 8.6% | 14.7% |
| Richmond | | | | | | | |
| Total Nonfarm | 667.7 | 665.2 | 675.9 | 682.3 | 2.2% | 10.7% | 12.0% |
| Health Care & Social Assistance | 84.0 | 85.5 | 86.7 | 86.1 | 2.5% | 2.8% | -8.0% |
| Rest of Virginia | | | | | | | |
| Total Nonfarm | 1,036.6 | 1,047.6 | 1,055.9 | 1,064.2 | 2.7% | 6.5% | 9.9% |
| Health Care & Social Assistance | 129.3 | 129.6 | 130.9 | 132.5 | 2.5% | 9.3% | 15.7% |

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

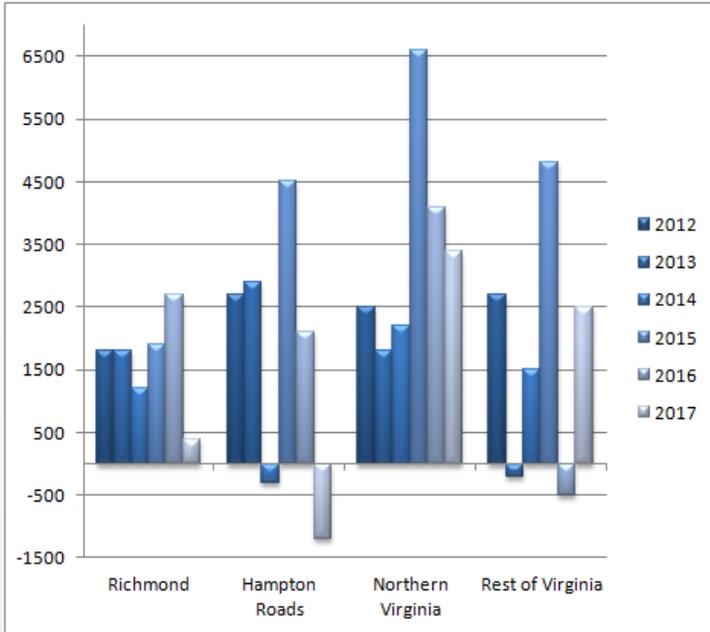


Figure 1: Annual Change in HC&SA Employment (Not Seasonally Adjusted, Full-Year Change for 2012-2016, Jan.-June for 2017).

According to preliminary data released on Friday, July 21, 2017 by the U.S. Department of Labor, Bureau of Labor Statistics, Virginia’s Health Care & Social Assistance (HC&SA) sector created 2,200 jobs in June, which represents a one-month annualized employment growth rate of 6.1%

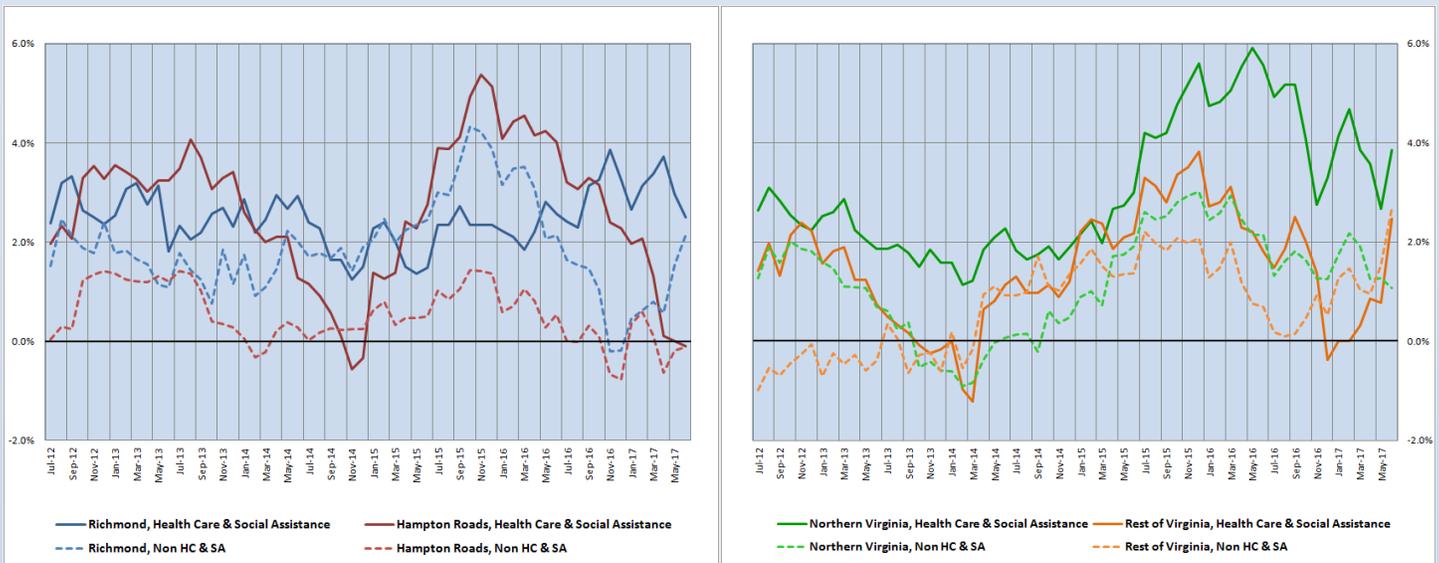
Once again, the Rest of Virginia made the largest contribution to the state’s HC&SA employment during the month with the creation of 1,600 new jobs. With this gain, HC&SA employment in the Rest of Virginia has now increased in each of the past four months. So far this year, the Rest of Virginia has created 2,500 HC&SA jobs. Only Northern Virginia has created more HC&SA jobs in 2017. After increasing employment by 1,500 in June, Northern Virginia has now created 3,400 new jobs in its HC&SA sector so far this year.

Meanwhile, the other two regions in the state saw HC&SA employment decline during the month. Richmond’s HC&SA sector broke a four-month streak of positive employment growth after losing 600 jobs in June, while Hampton Roads saw employment in its HC&SA sector decline by 300.

Year-Over-Year Regional Employment Growth

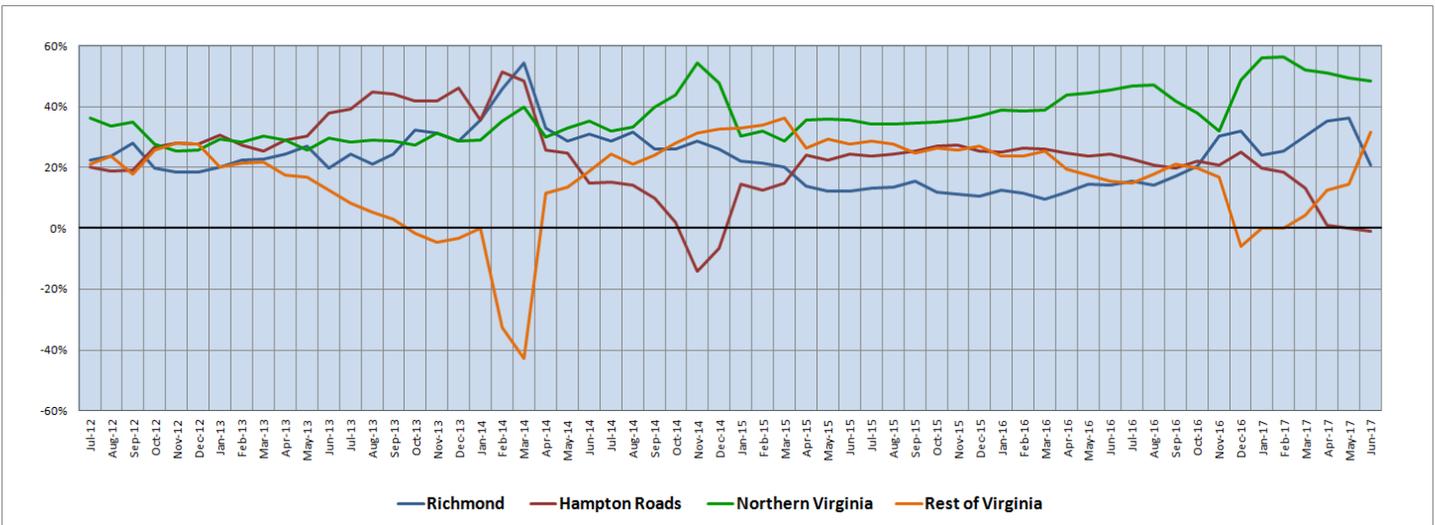
Thanks to its strong month of employment growth, Northern Virginia’s year-over-year HC&SA employment growth rate increased from 2.67% to 3.85%. At its current level, Northern Virginia has once again the fastest year-over-year HC&SA employment growth rate in the state. The Rest of the Virginia experienced an even more dramatic increase in its year-over-year HC&SA employment growth rate during the month after more than tripling from 0.77% to 2.47%, thereby reaching its highest value in nine months. Meanwhile, Richmond saw its year-over-year HC&SA employment growth rate fall from 2.97% to 2.50%, and Hampton Roads saw its own growth rate fall from 0.00% to -0.11%.

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.



Although Northern Virginia actually experienced a slight decline in its 12-month HC&SA employment growth share in June from 49.28% to 48.51%, it still remains the main driver of HC&SA employment growth in the state. The Rest of Virginia was the only region in the state that saw an increase in its 12-month HC&SA employment growth rate during the month. In fact, its growth share more than doubled in June from 14.49% to 31.68%. The Rest of Virginia’s 12-month HC&SA employment growth share has now reached its highest level since March 2015. As for Richmond, its 12-month HC&SA employment growth share fell from 36.23% to a nine-month low of 20.79%. Finally, Hampton Roads saw its 12-month HC&SA employment growth share decline for the sixth consecutive month in June from 0.00% to -0.99%.

Subsector Employment Growth

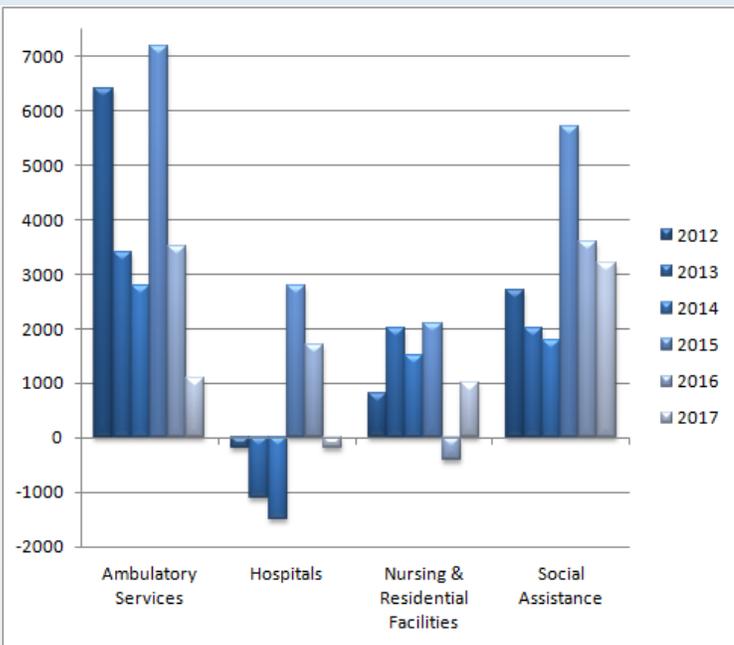


Figure 4: Annual & YTD Change in HC&SA Subsector Employment (Not Seasonally Adjusted, Full-Year Change for 2012-2016, Jan.-June for 2017).

In June, Ambulatory Health Care Services created more jobs than any other HC&SA subsector in the state. After creating 1,500 new jobs in June, Virginia’s Ambulatory Health Care Services subsector has now increased employment in three of the past four months. In addition, this subsector has increased HC&SA employment by 1,100 so far this year. Only Social Assistance has created more jobs in 2017.

Virginia’s Social Assistance subsector also enjoyed a strong month of employment growth in June with the creation of 1,400 new jobs. In fact, employment in Social Assistance has already increased by 3,100 during the first half of 2017. In just six months, Virginia’s Social Assistance has already nearly exceeded its full-year employment gain from 2016.

As for Virginia’s Hospitals, this HC&SA subsector saw no change in employment in June. Nursing & Residential Care Facilities was the only HC&SA subsector in the state that lost jobs in June. Employment in this subsector fell by 700 during the month.

Distribution of Growth by Subsector

| Not Seasonally Adjusted | Employment, in Thousands | | | | Growth Rate, Annualized | | |
|--|--------------------------|-----------|----------|-----------|-------------------------|---------|---------|
| | June 2016 | Mar. 2017 | May 2017 | June 2017 | 12 Month | 3 Month | 1 Month |
| Virginia | | | | | | | |
| Health Care & Social Assistance | 433.7 | 437.7 | 441.6 | 443.8 | 2.3% | 5.7% | 6.1% |
| <i>Ambulatory Health Care Services</i> | 172.6 | 173.6 | 174.8 | 176.3 | 2.1% | 6.4% | 10.8% |
| <i>Hospitals</i> | 104.5 | 105.4 | 105.7 | 105.7 | 1.1% | 1.1% | 0.0% |
| <i>Nursing & Residential Care Facilities</i> | 76.0 | 76.1 | 77.5 | 76.8 | 1.1% | 3.7% | -10.3% |
| <i>Social Assistance</i> | 80.6 | 82.6 | 83.6 | 85.0 | 5.5% | 12.1% | 22.1% |
| Hampton Roads | | | | | | | |
| Health Care & Social Assistance | 93.2 | 93.2 | 93.4 | 93.1 | -0.1% | -0.4% | -3.8% |
| <i>Hospitals</i> | 22.3 | 22.5 | 22.5 | 22.4 | 0.4% | -1.8% | -5.2% |
| Northern Virginia | | | | | | | |
| Health Care & Social Assistance | 127.2 | 129.4 | 130.6 | 132.1 | 3.9% | 8.6% | 14.7% |
| <i>Ambulatory Health Care Services</i> | 59.5 | 61.0 | 61.7 | 63.0 | 5.9% | 13.8% | 28.4% |
| <i>Hospitals</i> | 24.4 | 24.8 | 24.8 | 24.8 | 1.6% | 0.0% | 0.0% |

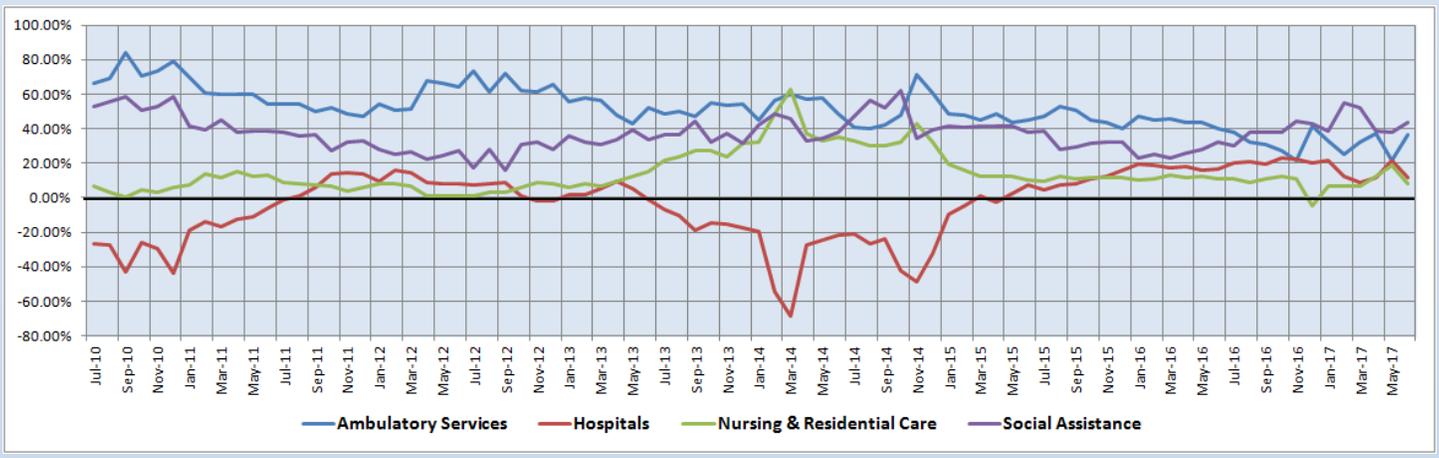
Preliminary estimates are italicized

The impressive employment growth in Virginia’s Social Assistance subsector continued unabated in June. Employment in Social Assistance grew at a 22.1% annualized rate in June, while its current three-month annualized employment growth rate is nearly as impressive at 12.1%. In addition, employment in this subsector has grown by 5.5% over the past year, which is more than double the statewide 12-month average for the HC&SA sector. Ambulatory Health Care Services also experienced strong growth in June with a one-month annualized employment growth rate of 10.8%. Its three-month annualized employment growth rate of 6.4% is also above the comparable statewide HC&SA average of 5.7%.

Share of 12-Month Growth by Subsector

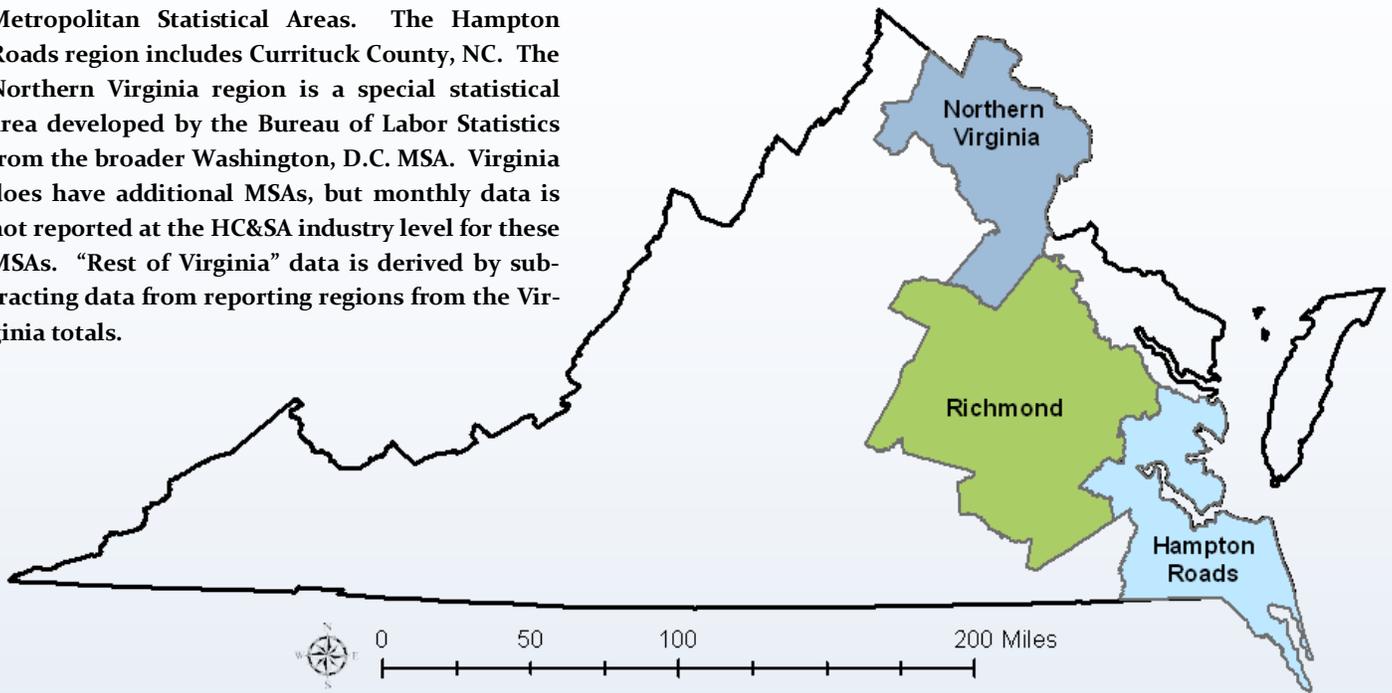
After falling for three consecutive months, the 12-month HC&SA employment growth share of Virginia’s Social Assistance subsector rebounded in June from 37.68% to 43.56%. At its current level, Social Assistance continues to remain the largest contributor to 12-month HC&SA employment growth in the state. Ambulatory Health Care Services saw an even larger increase in its 12-month HC&SA employment growth share during the month from 21.74% to 36.63%. As for Virginia’s Hospitals, this subsector experienced a decline in its 12-month HC&SA employment growth share from 21.74% to 11.88%, while Nursing & Residential Care Facilities saw its 12-month HC&SA employment growth share fall from 18.84% to 7.92%.

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)