



New River Mount Rogers

WDA II Quarterly Workforce Report (2016 Q3)



Prepared by The Virginia Tech Office of Economic Development
October 2016



Quarterly Workforce Report 2016 Q3

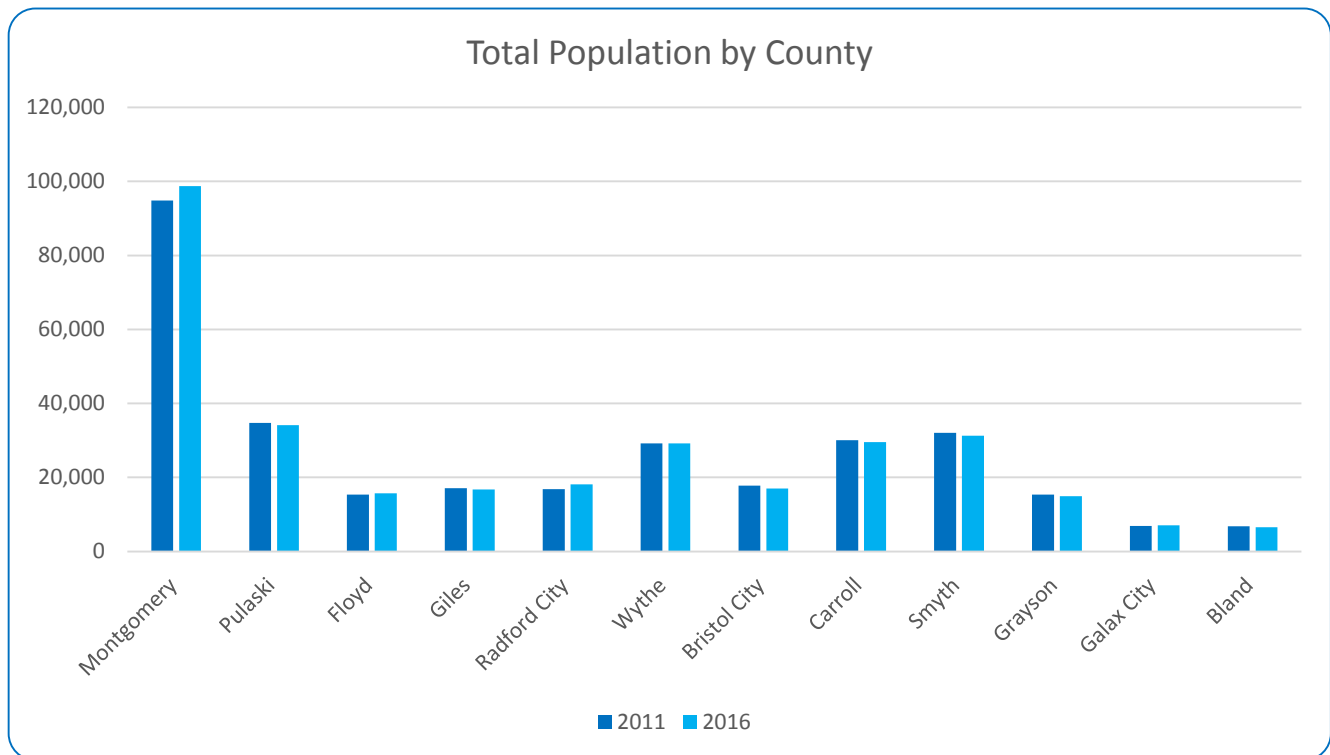
Healthcare

Welcome to the 2016 third quarter workforce report produced by the Virginia Tech Office of Economic Development on behalf of the New River Mount Rogers Workforce Development Board (WDB). This region comprises the New River Valley and Mount Rogers Planning Districts, including the counties of Bland, Carroll, Floyd, Giles, Grayson, Montgomery, Pulaski, Smyth, Washington, Wythe and the independent cities of Bristol, Galax and Radford. These quarterly reports analyze and present regional labor supply and demand data to inform the public of the evolving workforce landscape. Note the data presented in this report is the most up-to-date data available in July 2016.

Each Quarterly Workforce Report focuses on one particular theme, so that over the course of each year, multiple top sectors are covered in depth. In 2016, the theme for the Q1 report was Manufacturing, and the theme for the Q2 report was Tourism. This report for Q3 focuses on Healthcare.

This report provides data relevant to workforce and healthcare in the New River Mount Rogers region. The first half of the report includes data relating to population, employment, top industries, and commuting patterns. The second half of the report provides data on healthcare-related occupations and brief case studies of healthcare-related training programs and success stories in the area.

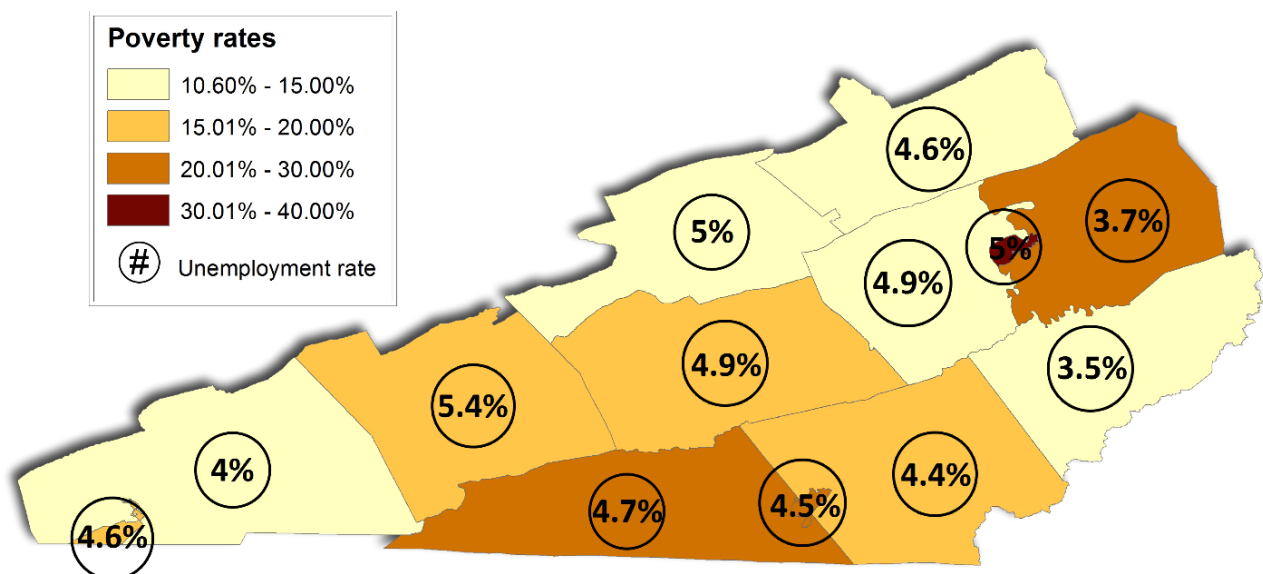
Total 2016 population in the New River Mount Rogers (NRMR) Workforce Area is approximately 373,701.



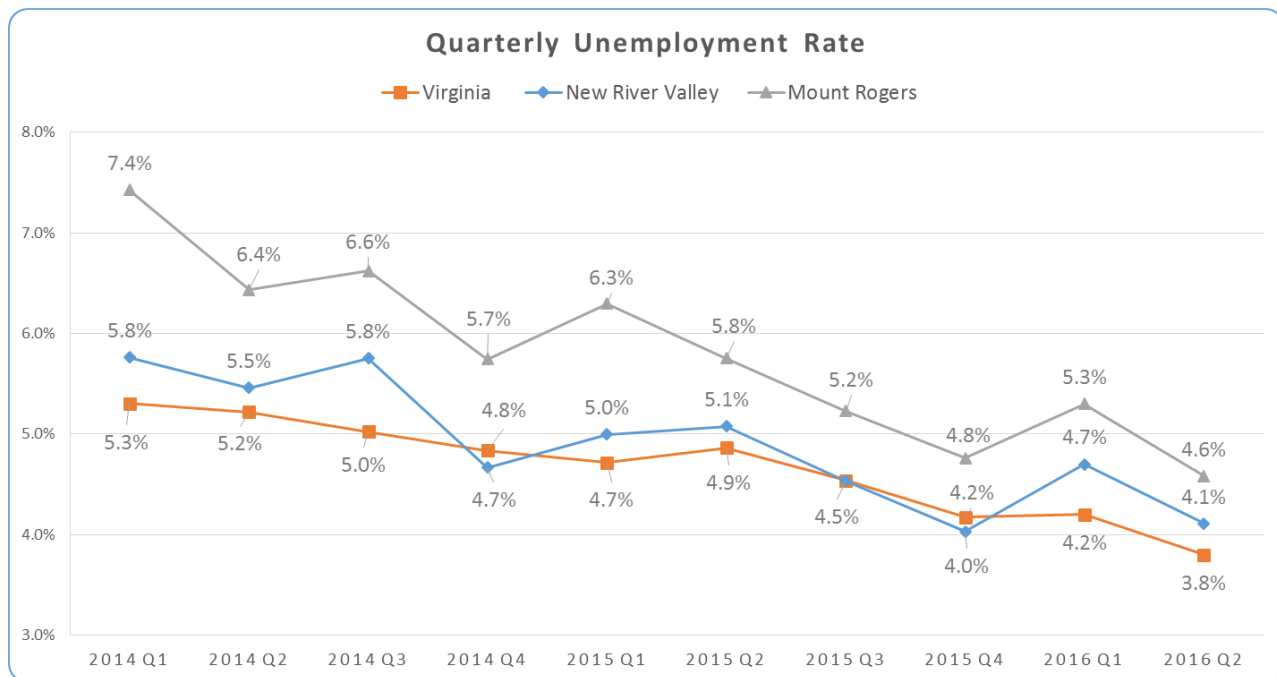
Source: Emsi Analyst. 2016.2. Class of Worker.QCEW

Population remained fairly stable over the past five years, although some jurisdictions such as Montgomery County and Radford City experienced notable population increases. 2014 five-year averages show these two jurisdictions, along with Grayson County and the City of Galax, to have the highest percent of population living below the poverty line. The unemployment rate in most jurisdictions (except Montgomery and Floyd Counties) was higher than the State average of 3.8%, but more comparable to U.S. unemployment, 4.9%.

Unemployment Rate (2016Q2) and Poverty Rate by County (2010-2014)



Source: U.S. Census American Community Survey, 2014 Five-Years Estimate, and Bureau of Labor Statistics; Bureau of Labor Statistics, Local Area Unemployment Statistics, April-June 2016 averages.



Source: U.S. Bureau of Labor Statistics, Local Area Unemployment Statistics

Since 2014, the unemployment rate has declined significantly in the region. Underemployment is another important indicator to consider. Underemployed individuals include “discouraged workers,” who have given up on seeking employment, workers who are part-time for economic reasons but not by choice, those who hold multiple jobs, those who are underutilized, and those who earn wages lower than the livable wage rate. As the table below shows, the Mount Rogers region has a higher underemployment rate than the New River Valley region. An estimate 10,718 individuals are underemployed in the Mount Rogers area, while 7,106 individuals are estimated to be underemployed in the New River Valley.

Quarterly Underemployment Rate (2016 Q2)

	Labor Force	Employed	Underemployment	Underemployment Rate
Pulaski	15,841	15,019	1,279	8.1%
Floyd	8,016	7,709	647	
Giles	7,745	7,359	625	
Montgomery	48,200	46,054	3,890	
Radford	8,235	7,724	665	
Galax	2,910	2,766	356	12.2%
Bland	2,770	2,614	339	
Wythe	13,761	13,054	1,685	
Smyth	13,674	12,880	1,674	
Grayson	6,988	6,647	856	
Carroll	13,200	12,587	1,616	
Bristol	7,429	7,034	910	
Washington	26,808	25,562	3,282	

Source: Virginia Economic Development Partnership, <http://www.virginiaallies.org/>.

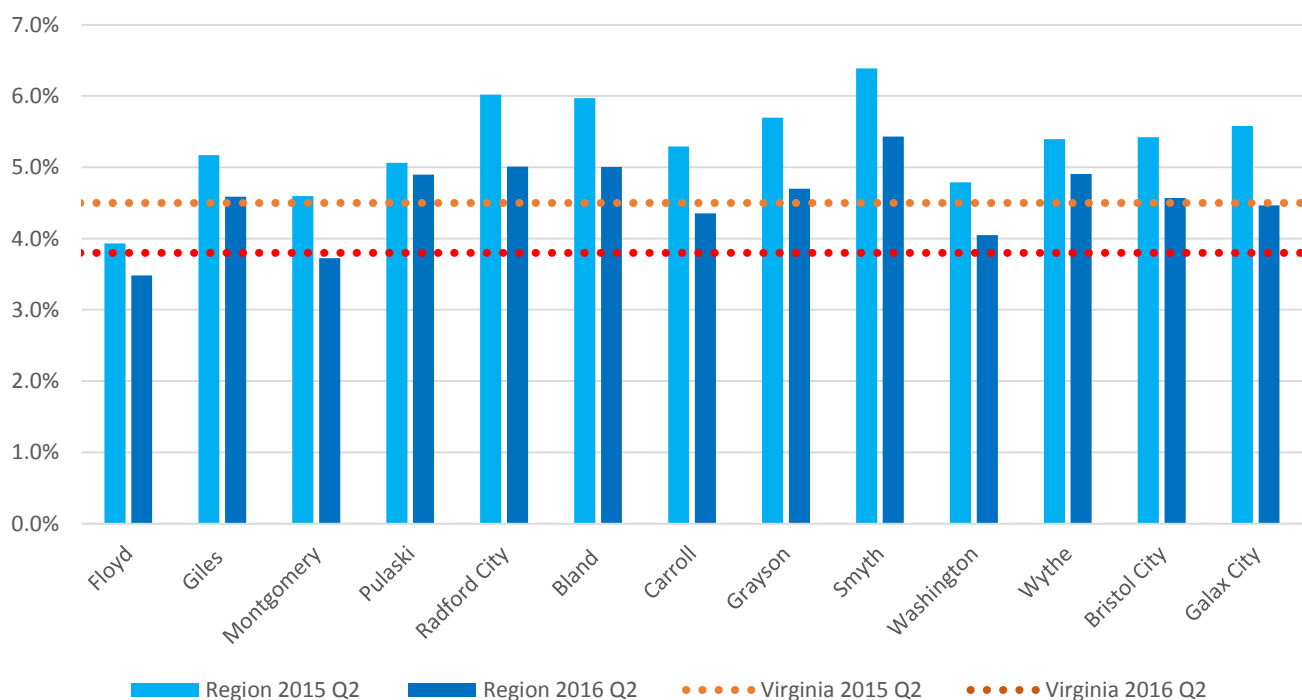
Top 10 Industries with Employment Loss

Industry (6-digit NAICS)	2011 Jobs	2016 Jobs	Change in Jobs	% Change	2016 Earnings Per Worker
Telephone Answering Services	1,296	807	-489	-38%	\$36,810
General Medical and Surgical Hospitals	3,945	3,481	-464	-12%	\$54,161
Air-Conditioning and Warm Air Heating Equipment and Commercial and Industrial Refrigeration Equipment Manufacturing	999	578	-421	-42%	\$60,274
All Other Miscellaneous Chemical Product and Preparation Manufacturing	422	97	-325	-77%	\$103,534
Relay and Industrial Control Manufacturing	373	70	-302	-81%	\$134,622
Residential Remodelers	548	258	-291	-53%	\$37,058
Discount Department Stores	1,111	834	-277	-25%	\$19,533
Telemarketing Bureaus and Other Contact Centers	1,123	848	-275	-25%	\$23,166
Highway, Street, and Bridge Construction	744	501	-243	-33%	\$53,069
Colleges, Universities, and Professional Schools (State Government)	12,120	11,894	-226	-2%	\$59,370

Source: U.S. Bureau of Labor Statistics, Local Area Unemployment Statistics

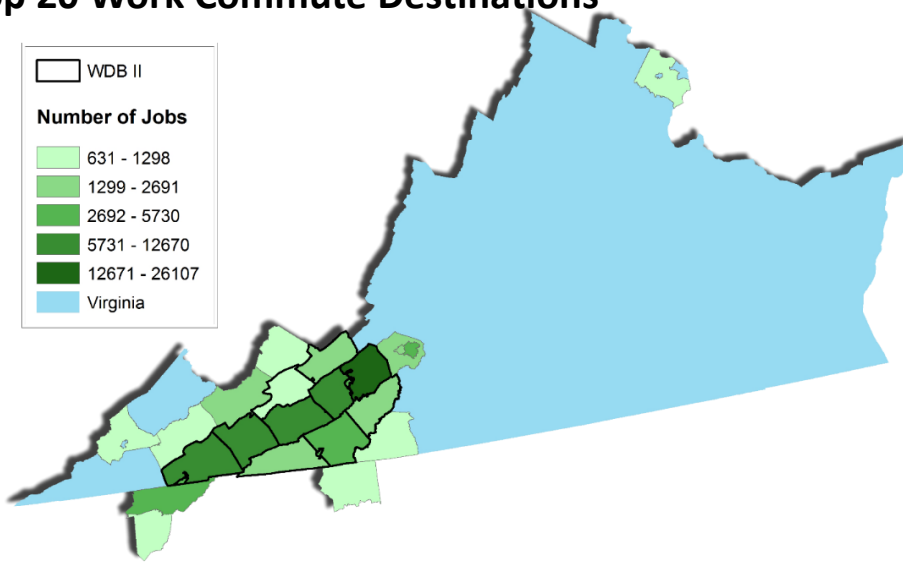
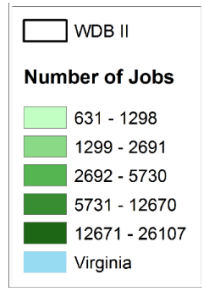
Telephone answering services and hospitals were among the two industries with the greatest decline in job numbers from 2011-2016. Three manufacturing related industries were also among the top five industries exhibiting negative job changes. Meanwhile companies in truck manufacturing, supermarkets, office of physicians, full service restaurants and residential property management increased hiring. In the past year, unemployment rates have decreased due to small hiring across many industries including elderly services, temporary help services and local government.

Quarterly Unemployment Rates by County



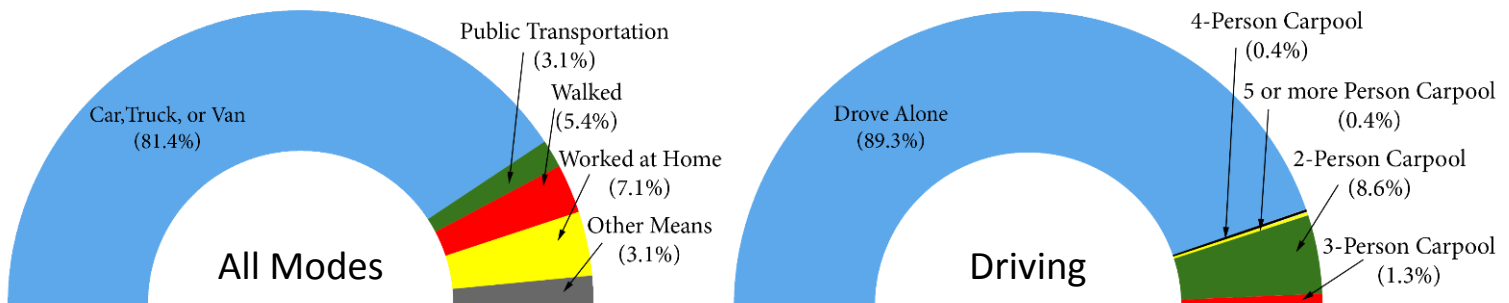
Source: U.S. Bureau of Labor Statistics, Local Area Unemployment Statistics

Top 20 Work Commute Destinations



This map illustrates the top work commute destinations the region's residents. While most work inside the region, others work in adjacent counties. Sullivan County, TN and Roanoke City are among the top commute destinations outside the area. Others may technically work in Fairfax County, but most likely work remotely.

Modes of Transportation



Average Monthly Commute Cost Estimate and Vehicle Miles Travelled

		Average Commute Cost = Average Commute time × Average Speed × Average Mileage × Fuel Cost	
Low Speed 35 MpH	Low Mileage	\$78.64	\$57.96
	High Mileage	551 Miles	551 Miles
High Speed 55 MpH	Low Mileage	\$123.58	\$91.09
	High Mileage	866 Miles	866 Miles

Most workers commute by car. Of those, nearly 90% drive alone, with 10% utilizing some type of carpool.

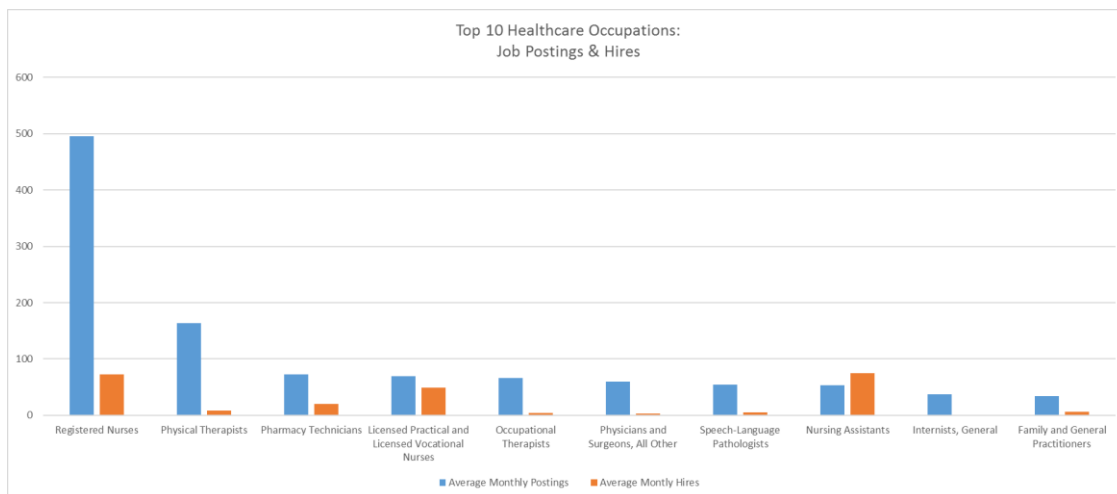
The table to the left approximates monthly spending by commuter. For workers making two trips per day for 20 work days per month, the work-related monthly fuel costs may be as much as \$123.58 depending on distance and average speed.

Top 10 Healthcare Occupations by Employment

	Registered Nurses (2,084 Employees, \$26.59/hr)
	Nursing Assistants (1,495 Employees, \$11.79/hr)
	Licensed Practical and Licensed Vocational Nurses (994 Employees, \$16.93/hr)
	Emergency Medical Technicians and Paramedics (256 Employees, \$13.34/hr)
	Psychiatric Technicians (362 Employees, \$12.07/hr)
	Pharmacy Technicians (415 Employees, \$12.51/hr)
	Dental Assistant (225 Employees, \$16.69/hr)
	Pharmacists (235 Employees, \$58.29/hr)
	Medical Assistants (225 Employees, \$13.49/hr)
	Home Health Aides (300 Employees, \$11.63/hr)



Source: Emsi Analyst. 2016.3. Class of Worker QCEW



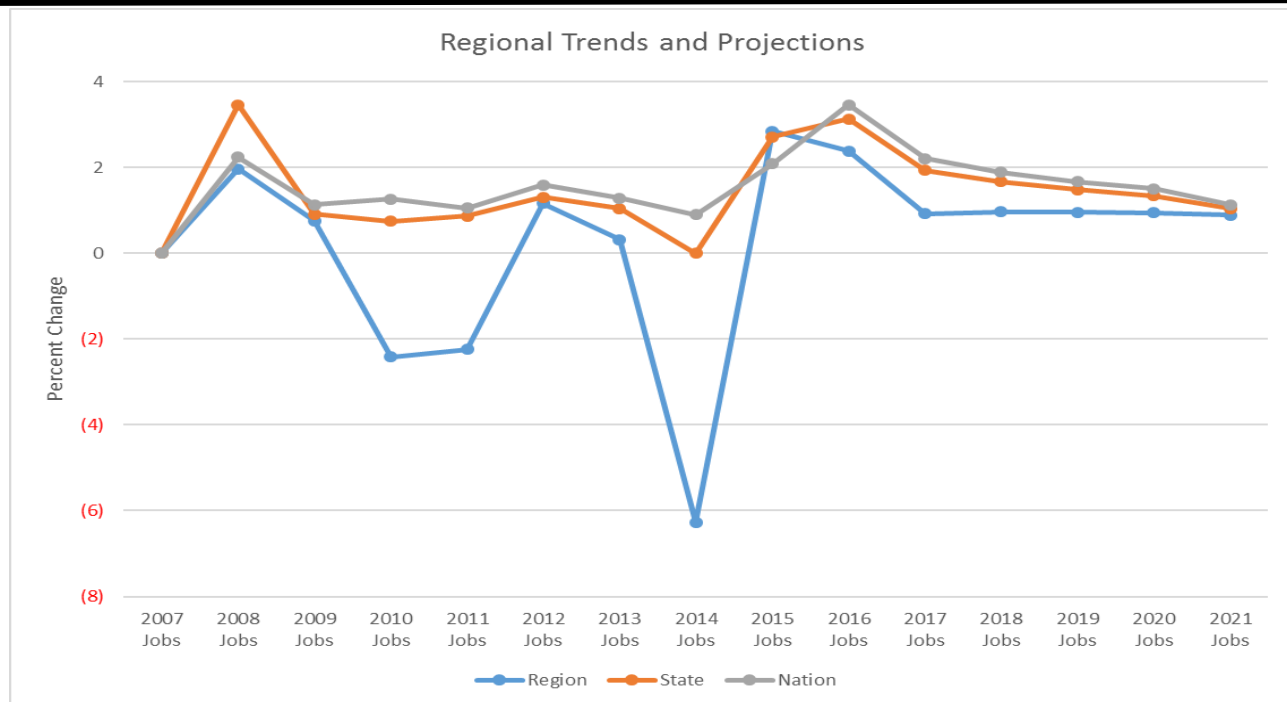
Source: Emsi Analyst. 2016.3. Class of Worker.QCEW

As the above graph represents, Registered Nurses, with 2,084 current jobs, play a major role in supporting the region's healthcare industry. As such, they are in high demand with over 475 or so monthly hires on average.

Estimated Number of Healthcare Establishments by County

	Social Assistance	Nursing and Residential Care Facilities	Hospitals	Office of Physicians	Office of Dentists	Office of Other Health Practitioners	Outpatient Care Centers	Medical & Diagnostic Laboratories	Home Health Care Services
Montgomery	195	8	6	55	26	27	14	13	10
Pulaski	106	4	1	16	7	8	4	2	6
Floyd	77	4	0	5	1	6	0	0	0
Giles	80	2	1	3	3	4	2	1	0
Radford City	18	1	0	4	4	2	4	1	2
Bland	30	1	0	2	2	1	0	0	0
Carroll	166	4	0	9	5	5	3	2	4
Smyth	301	2	1	9	10	4	2	0	0
Washington	267	14	3	46	14	21	3	8	8
Grayson	153	2	0	2	1	3	1	1	1
Wythe	136	4	1	19	6	7	2	1	4
Bristol City	84	5	2	5	5	12	1	2	2
Galax City	62	5	1	16	6	3	4	1	2

Source: Emsi Analyst. 2016.2. Class of Worker.QCEW



Source: Emsi Analyst. 2016.3. Class of Worker.QCEW

As seen above, area demand for Registered Nurses has fluctuated but is projected to increase over the next five years. The vast majority of Registered Nurses in the region work in hospitals and 92.4% are female. The New River Community College and Wytheville Community College offer Associates of Applied Science in Nursing to prepare students to become registered nurses (R.N.). They also offer Practical Nursing programs, preparing students in careers as practical nurses (P.N.).

Industries with the Highest Concentration of Employment in this Occupation

Industry	Employment (Local)	Percent of industry employment (Local)	Regional Hourly Mean Wage	National Hourly Mean wage
General Medical and Surgical Hospitals	1,125	52.7%	\$26.24	\$35.09
Specialty (except Psychiatric and Substance Abuse) Hospitals	28	1.3%		\$36.69
Psychiatric and Substance Abuse Hospitals	<10	0.3%		\$32.49
Outpatient Care Centers	58	2.7%		\$35.39
Home Health Care Services	92	4.3%		\$32.94

Source: EMSI Analyst. 2016.3. Class of Worker. QCEW, and U.S. Bureau of Labor Statistics

92.4%
of workers in
this field are
female

9,399
Unique Job
postings from
April to June
2016

**Bachelor's
Degree
Preferred**

\$65,950
Median
Salary

7.4%
Only 7.4% of
workers currently
in this field are
minorities

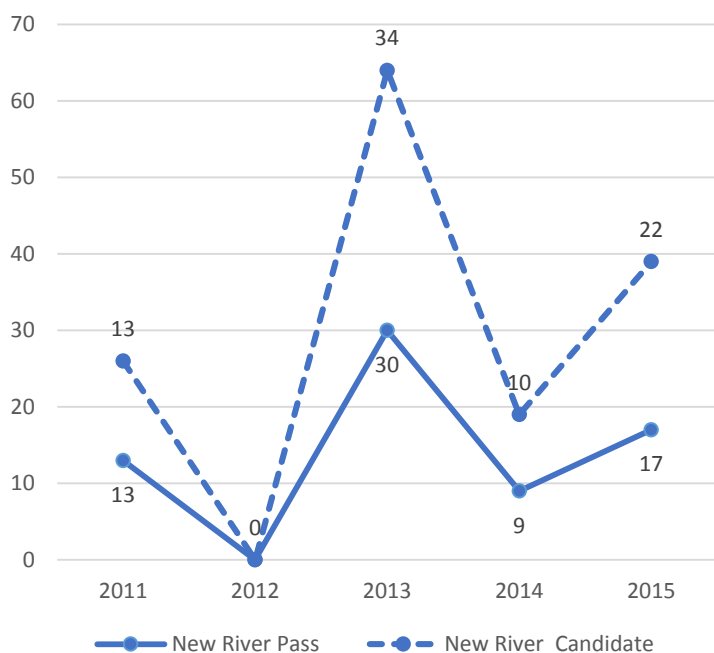
Healthcare Related Associate's Degree or Certificate Program Completions School Year 2014-2015

Programs	New River Community College	Wytheville Community College
Allied Health Diagnostic, Intervention, and Treatment Professions, Other	9	62
Health Information/Medical Records Technology/Technician	15	15
Licensed Practical/Vocational Nurse Training	10	19
Clinical/Medical Laboratory Technician	0	6
Dental Assisting/Assistant	-	9
Health & Medical Administrative Services, Other	18	20
Mental and Social Health Services and Allied Professions, Other	6	163
Radiologic Technology/Science-Radiographer	-	1

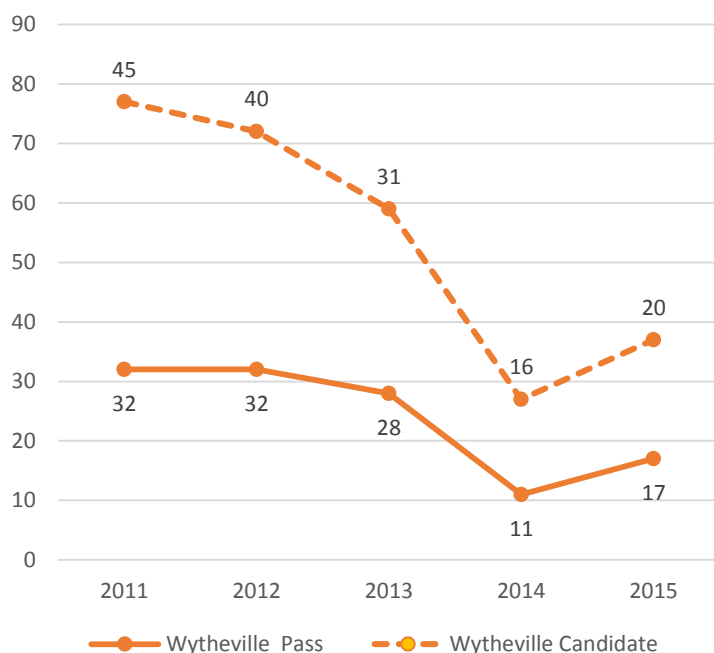
Source: National Center for Education Statistics

Nursing candidates from New River Community College, and Wytheville Community College have maintained a pass rate higher than 68% in Practical Nursing exams since 2011.

Practical Nursing Exam Candidates and Passes, 2011-2015



Practical Nursing Exam Candidates and Passes, 2011-2015



Source: Virginia Board of Nursing



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