



Virginia Healthcare Workforce Briefs

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

Series 2, Issue 101

August 2020

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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.
- ◆ Every region in the state enjoyed positive HC&SA employment growth in July. The Rest of Virginia was responsible for more than half of this month's statewide HC&SA employment gain thanks to the creation of 2,900 new jobs in July. Hampton Roads and Richmond also experienced strong HC&SA employment growth with the creation of 1,000 and 900 jobs, respectively. The employment growth in Northern Virginia's HC&SA sector was more modest as this region added 100 jobs during the month.
- ◆ As in June, the entirety of July's HC&SA employment growth in Virginia came from Ambulatory Health Care Services and Social Assistance. With the creation of 3,800 new jobs in July, Ambulatory Health Care Services have increased employment for three consecutive months. As for Social Assistance, this HC&SA subsector added 3,200 new jobs during the month. However, Hospitals lost 1,900 jobs in July, while Nursing & Residential Care Facilities saw employment fall by 200 during the month.

Data in Brief

Not Seasonally Adjusted*	Employment, in Thousands				Growth Rate, Annualized		
	July 2019	Apr. 2020	June 2020	July 2020	12 Month	3 Month	1 Month
Virginia							
Total Nonfarm	4,066.6	3,669.9	3,792.7	3,782.9	-7.0%	12.9%	-3.1%
Health Care & Social Assistance	460.2	409.6	420.1	425.0	-7.6%	15.9%	14.9%
Hampton Roads							
Total Nonfarm	800.2	711.2	746.8	754.1	-5.8%	26.4%	12.4%
Health Care & Social Assistance	95.5	89.7	88.9	89.9	-5.9%	0.9%	14.4%
Northern Virginia							
Total Nonfarm	1,523.2	1,381.6	1,426.2	1,401.0	-8.0%	5.7%	-19.3%
Health Care & Social Assistance	137.3	116.2	119.7	119.8	-12.7%	13.0%	1.0%
Richmond							
Total Nonfarm	686.7	620.1	638.2	640.7	-6.7%	14.0%	4.8%
Health Care & Social Assistance	87.0	77.6	81.4	82.3	-5.4%	26.5%	14.1%
Rest of Virginia							
Total Nonfarm	1,056.5	957.0	981.5	987.1	-6.6%	13.2%	7.1%
Health Care & Social Assistance	140.4	126.1	130.1	133.0	-5.3%	23.8%	30.3%

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 U.S. 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

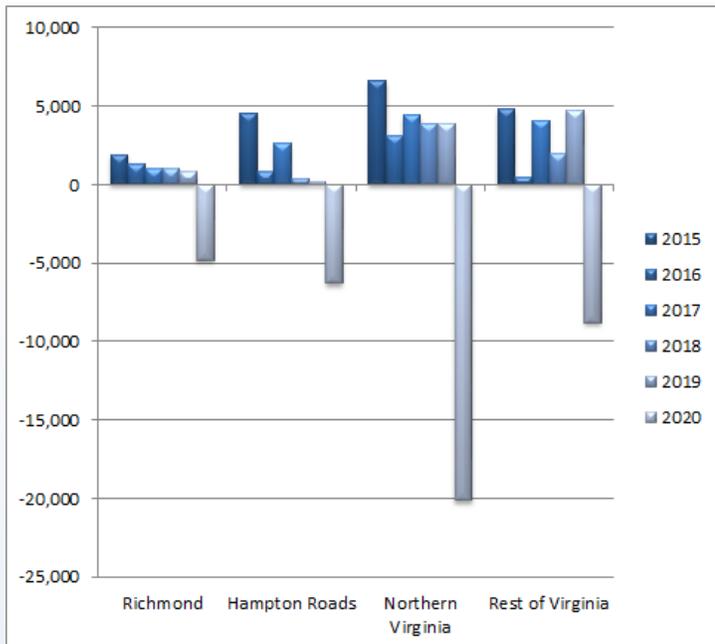


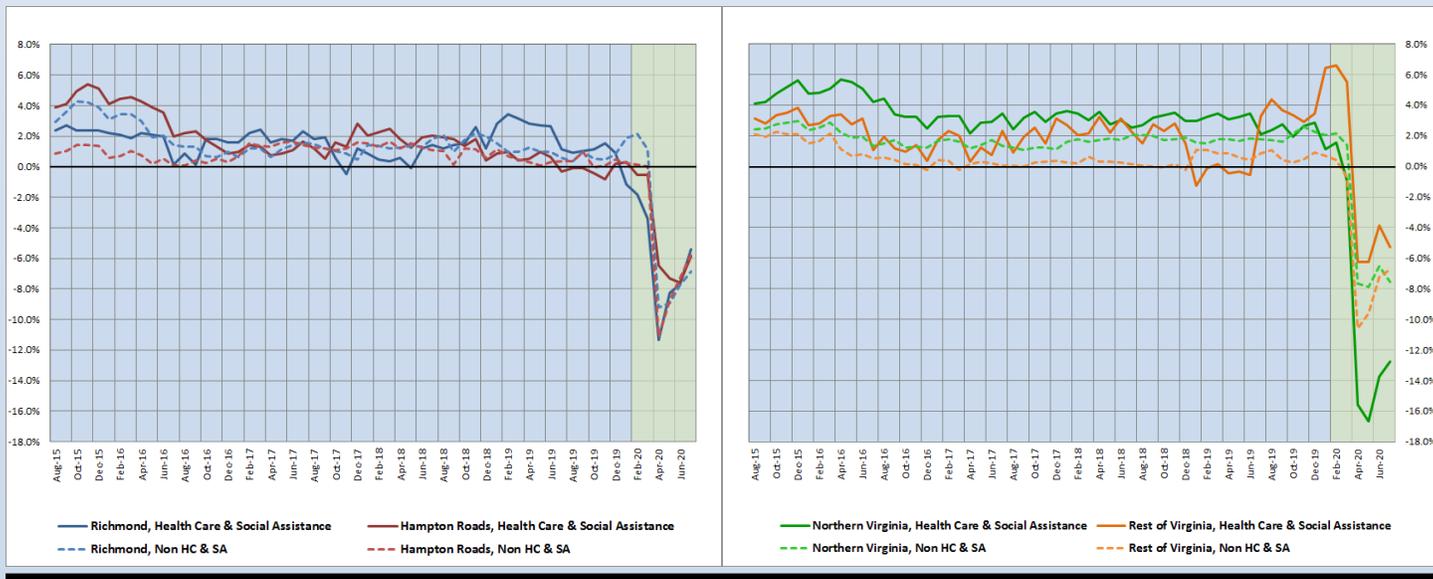
Figure 1: Annual & YTD Change in HC&SA Regional Employment (Not Seasonally Adjusted, Full-Year Change for 2015-2019, Year-to-Date Change for 2020).

According to the preliminary data released on Friday, August 21, 2020, by the U.S. Department of Labor, Bureau of Labor Statistics, Virginia’s Health Care & Social Assistance (HC&SA) sector enjoyed strong job growth in July thanks to broad-based employment gains from across the entire state during the month. The Rest of Virginia was a major driver of this month’s HC&SA job growth. With 2,900 jobs created in July, this region was solely responsible for more than half of all statewide HC&SA employment growth in Virginia during the month. In addition, this gain represents a strong one-month annualized employment growth rate of 30.3%. Hampton Roads experienced its first month of positive HC&SA employment growth in 2020 thanks to a gain of 1,000 jobs in July. At the same time, Richmond’s HC&SA sector enjoyed its third consecutive month of positive employment growth after adding 900 jobs in July. During these past three months of positive employment growth, Richmond has created 4,700 HC&SA jobs, which translates into a 26.5% annualized growth rate. As for Northern Virginia, its HC&SA sector experienced a modest increase of 100 jobs in July.

Year-Over-Year Regional Employment Growth

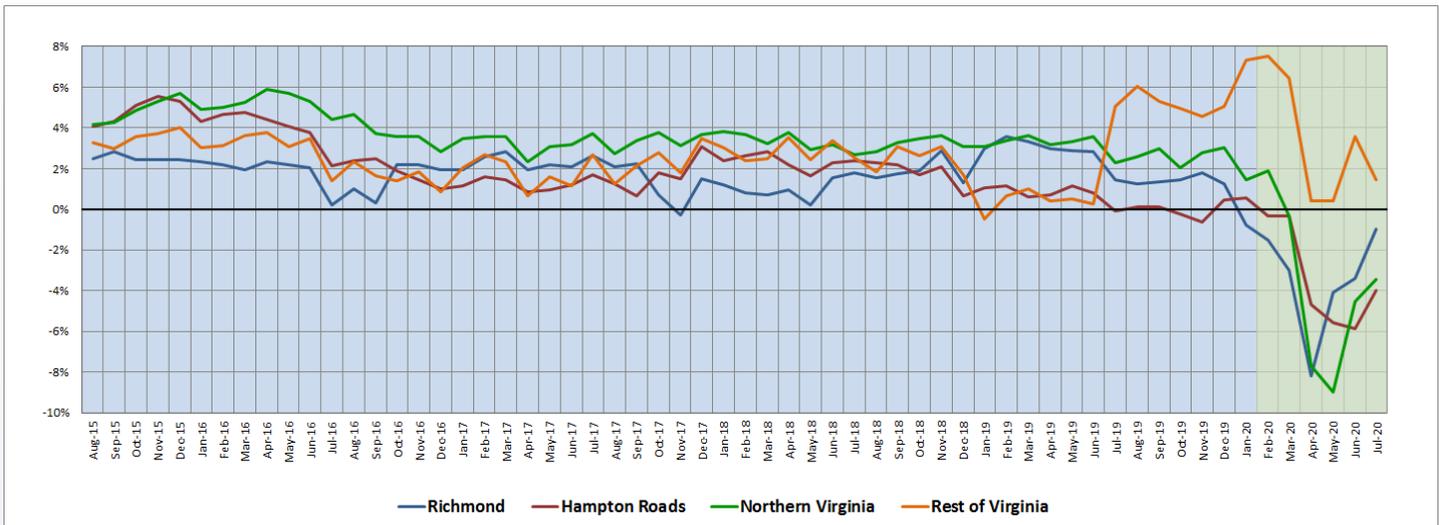
Despite the strong job gain in the Rest of Virginia’s HC&SA sector in July, its year-over-year employment growth rate still fell from -3.84% to -5.27% during the month. Regardless, the Rest of Virginia still has the highest year-over-year HC&SA employment growth rate in the state, which attests to the dramatic job dislocations across the state as a result of the coronavirus pandemic. Richmond saw its year-over-year HC&SA employment growth rate rise from -7.71% to -5.40%, while Hampton Roads experienced an increase in its growth rate from -7.59% to -5.86%. Northern Virginia’s comparable growth rate remains far below that of Virginia’s other three regions, but it did increase slightly in July from -13.76% to -12.75%.

Figure 2: Year-Over-Year Employment Growth (Not Seasonally Adjusted).



12-Month Average Employment Growth by Region

Figure 3: 12-Month Moving Average, HC&SA Regional Employment Growth Rate (Not Seasonally Adjusted).



The Rest of Virginia saw its 12-month employment growth rate moving average cut by more than half in July from 3.57% to 1.43%. Regardless, the Rest of Virginia remains the only region in the state that has a positive 12-month moving average, a distinction that it has held since the beginning of the coronavirus pandemic back in March. Meanwhile, Richmond experienced a significant increase in its 12-month employment growth rate moving average from -3.42% to -0.98%, thereby reaching its highest value since January. Virginia’s two other regions experienced more modest increases in their respective moving averages. Northern Virginia’s HC&SA sector saw its 12-month employment growth rate moving average increase from -4.54% to -3.44%, while the comparable moving average for Hampton Roads increased from -5.87% to -3.97%.

Subsector Employment Growth

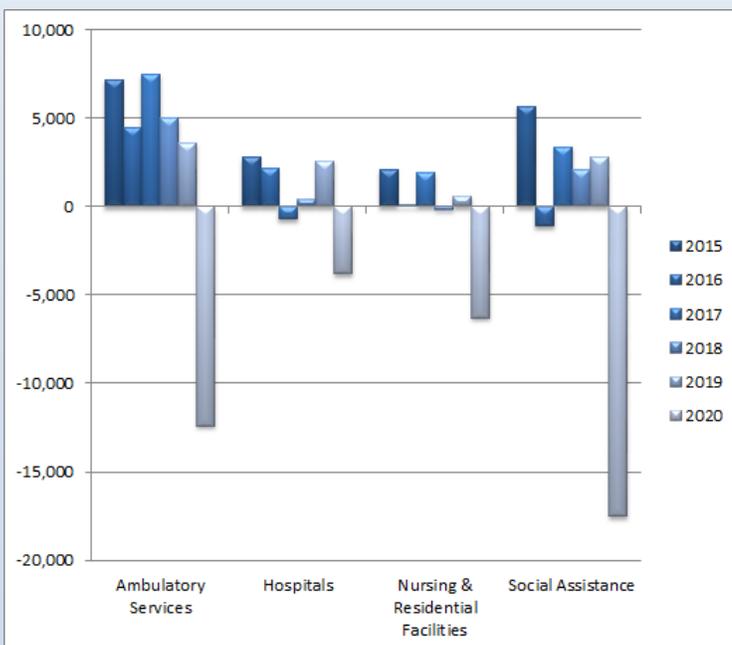


Figure 4: Annual & YTD Change in HC&SA Subsector Employment (Not Seasonally Adjusted, Full-Year Change for 2015-2019, Year-to-Date Change for 2020).

Since the beginning of the economic recovery three months ago, every region in Virginia has made a positive contribution to statewide HC&SA employment growth. However, the same is not the case with respect to the state’s HC&SA subsectors. In fact, the entirety of the state’s HC&SA employment gains have come from just two of Virginia’s four HC&SA subsectors. Ambulatory Health Care Services has been the main driver of this growth. Ambulatory Health Care Services are the only HC&SA subsector that has increased employment in each of the past three months, including a gain of 3,800 in July. In total, Ambulatory Health Care Services have created 15,400 jobs since May. Social Assistance began its own job recovery one month later than Ambulatory Health Care Services. Regardless, this HC&SA subsector has still created 5,000 over the past three months, including 3,200 jobs in July. However, Virginia’s two other HC&SA subsectors have experienced additional job losses during the state’s reopening. This continued in July as Hospitals lost 1,900 jobs, and Nursing & Residential Care Facilities lost 200 jobs.

Distribution of Growth by Subsector

Not Seasonally Adjusted	Employment, in Thousands				Growth Rate, Annualized		
	July 2019	Apr. 2020	June 2020	July 2020	12 Month	3 Month	1 Month
Virginia							
Health Care & Social Assistance	460.2	409.6	420.1	425.0	-7.6%	15.9%	14.9%
<i>Ambulatory Health Care Services</i>	189.8	164.5	176.1	179.9	-5.2%	43.0%	29.2%
<i>Hospitals</i>	107.2	107.1	106.8	104.9	-2.1%	-8.0%	-19.4%
<i>Nursing & Residential Care Facilities</i>	77.6	75.1	72.5	72.3	-6.8%	-14.1%	-3.3%
<i>Social Assistance</i>	85.6	62.9	64.7	67.9	-20.7%	35.8%	78.5%
Hampton Roads							
Health Care & Social Assistance	95.5	89.7	88.9	89.9	-5.9%	0.9%	14.4%
<i>Hospitals</i>	22.2	22.2	22.0	21.6	-2.7%	-10.4%	-19.8%
Northern Virginia							
Health Care & Social Assistance	137.3	116.2	119.7	119.8	-12.7%	13.0%	1.0%
<i>Ambulatory Health Care Services</i>	67.5	53.5	57.9	58.9	-12.7%	46.9%	22.8%
<i>Hospitals</i>	26.1	25.5	25.5	25.2	-3.4%	-4.6%	-13.2%

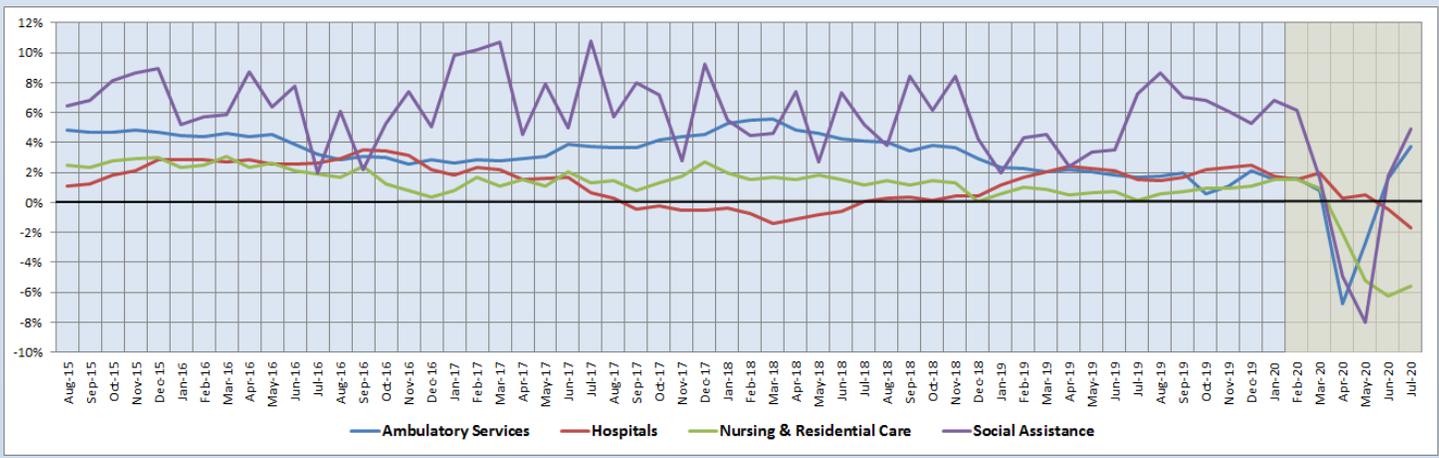
Preliminary estimates are italicized

The strong job recovery in Ambulatory Health Care Services and Social Assistance can also be observed through their high employment growth rates over the past several months. In July, employment in Social Assistance grew at a 78.5% annualized rate, while Ambulatory Health Care Services created jobs at a 29.2% annualized rate. Their three-month annualized employment growth rates are just as impressive. Ambulatory Health Care Services has increased employment at a 43.0% annualized rate over the past three months, while employment in Social Assistance has grown at a 35.8% annualized rate over the same time period. On the other hand, no HC&SA subsector has increased employment over the past 12 months.

12-Month Average Employment Growth by Subsector

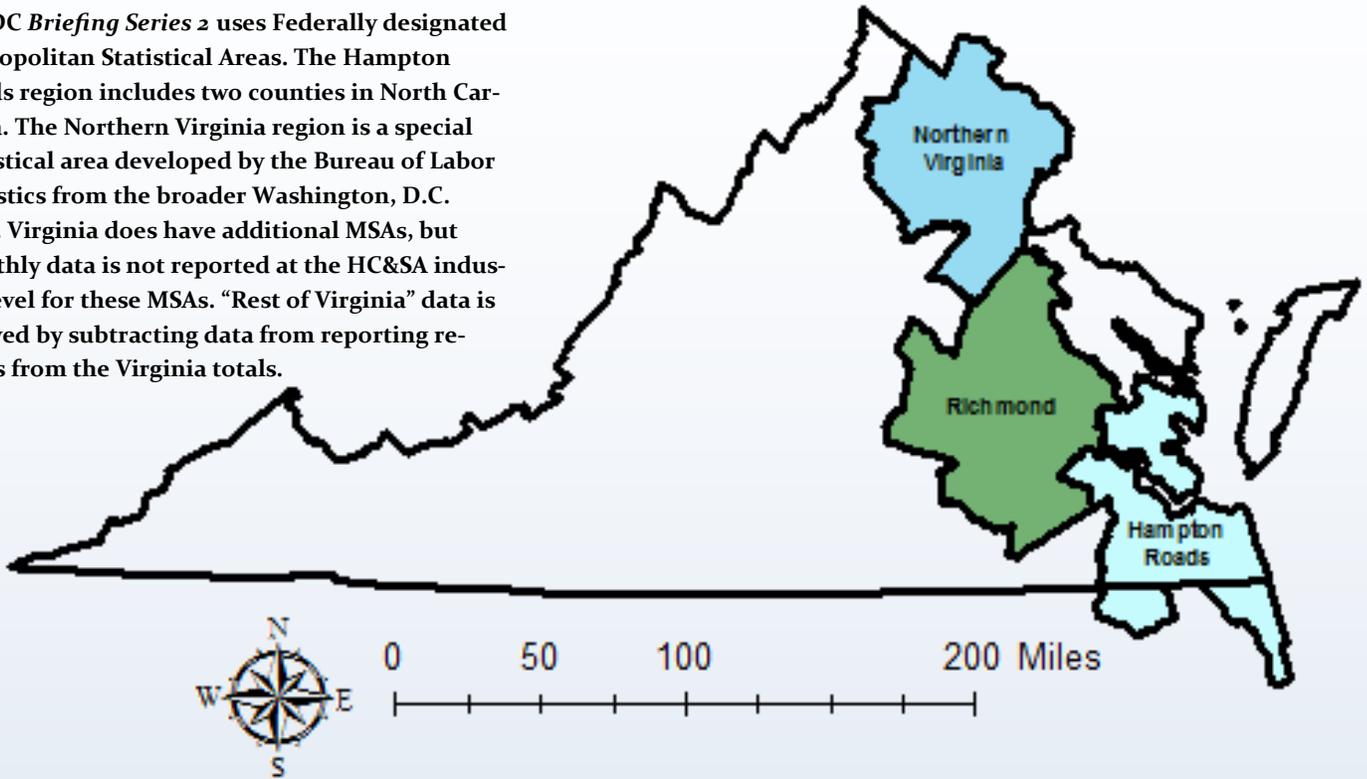
Thanks to the strong job gains in Social Assistance and Ambulatory Health Care Services since May, these two HC&SA subsector have seen their respective 12-month employment growth rate moving averages return to essentially the same levels that were observed before the commencement of the statewide lockdown. In July, the 12-month employment growth rate moving average for Social Assistance increased from 1.75% to 4.90%, while the comparable moving average for Ambulatory Health Care Services rose from 1.57% to 3.74%. Meanwhile, Nursing & Residential Care Facilities saw their 12-month moving average increase from -6.25% to -5.56%, but the comparable moving average for Hospitals fell from -0.42% to -1.67%.

Figure 5: 12-Month Moving Average, HC&SA Subsector Employment Growth Rate (Not Seasonally Adjusted).



Region Map

HWDC *Briefing Series 2* uses Federally designated Metropolitan Statistical Areas. The Hampton Roads region includes two counties in North Carolina. 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
Culpeper	Falls Church	Charles City	Petersburg	James City	Newport News
Fairfax	Fredericksburg	Chesterfield	Richmond	Mathews	Norfolk
Fauquier	Manassas	Dinwiddie		Surry	Poquoson
Loudoun	Manassas Park	Goochland		York	Portsmouth
Prince William		Hanover			Suffolk
Rappahannock		Henrico		<i>Currituck, NC</i>	Virginia Beach
Spotsylvania		King William		<i>Gates, NC</i>	Williamsburg
Stafford		New Kent			
Warren		Powhatan			
		Prince George			
		Sussex			

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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/PublicResources/HealthcareWorkforceDataCenter/.

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)

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About the Data

Data in this report are from the U.S. 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).