



Virginia Healthcare Workforce Briefs

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

Series 2, Issue 104

November 2020

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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 first time in 2020, every region in Virginia made a positive contribution to Health Care & Social Assistance (HC&SA) employment growth in the state. Northern Virginia's HC&SA sector made the largest contribution with the creation of 2,100 new jobs in October, while the Rest of Virginia added 1,900 HC&SA jobs during the month. At the same time, Hampton Roads and Richmond increased HC&SA employment by 1,700 and 500, respectively, in October.
- ◆ Every HC&SA subsector in the state also enjoyed positive employment growth during the month. Ambulatory Health Care Services made by far the largest impact to state-wide HC&SA employment growth thanks to the creation of 4,000 new jobs, but Social Assistance also enjoyed a very strong month with the addition of 1,400 jobs. Meanwhile, Nursing & Residential Care Facilities added 500 new jobs in October, and Hospitals increased employment by 300 during the month.

Data in this report are not seasonally adjusted. Self-employed persons, including health professionals in private practice, are not included.

Data in Brief

Not Seasonally Adjusted*	Employment, in Thousands				Growth Rate, Annualized		
	Oct. 2019	July 2020	Sept. 2020	Oct. 2020	12 Month	3 Month	1 Month
Virginia							
Total Nonfarm	4,082.0	3,788.8	3,864.2	3,908.0	-4.3%	13.2%	14.5%
Health Care & Social Assistance	462.8	425.2	427.7	433.9	-6.2%	8.4%	18.9%
Hampton Roads							
Total Nonfarm	795.3	754.5	758.4	771.5	-3.0%	9.3%	22.8%
Health Care & Social Assistance	95.7	89.8	90.2	91.9	-4.0%	9.7%	25.1%
Northern Virginia							
Total Nonfarm	1,528.8	1,413.1	1,449.5	1,462.9	-4.3%	14.9%	11.7%
Health Care & Social Assistance	138.4	119.7	122.5	124.6	-10.0%	17.4%	22.6%
Richmond							
Total Nonfarm	689.8	642.3	653.5	658.9	-4.5%	10.7%	10.4%
Health Care & Social Assistance	87.2	82.5	80.6	81.1	-7.0%	-6.6%	7.7%
Rest of Virginia							
Total Nonfarm	1,068.1	978.9	1,002.8	1,014.7	-5.0%	15.5%	15.2%
Health Care & Social Assistance	141.5	133.2	134.4	136.3	-3.7%	9.6%	18.3%

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

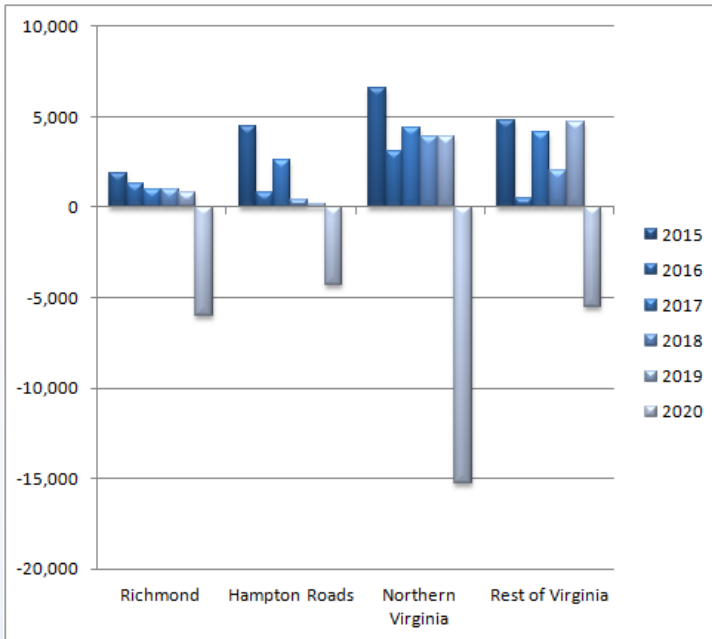


Figure 1: Annual & YTD Change in HC&SA Regional Employment (Not Seasonally Adjusted, Full-Year Change for 2015-2019, Year-to-Date Change for 2015-2019, Year-to-Date Change for 2020).

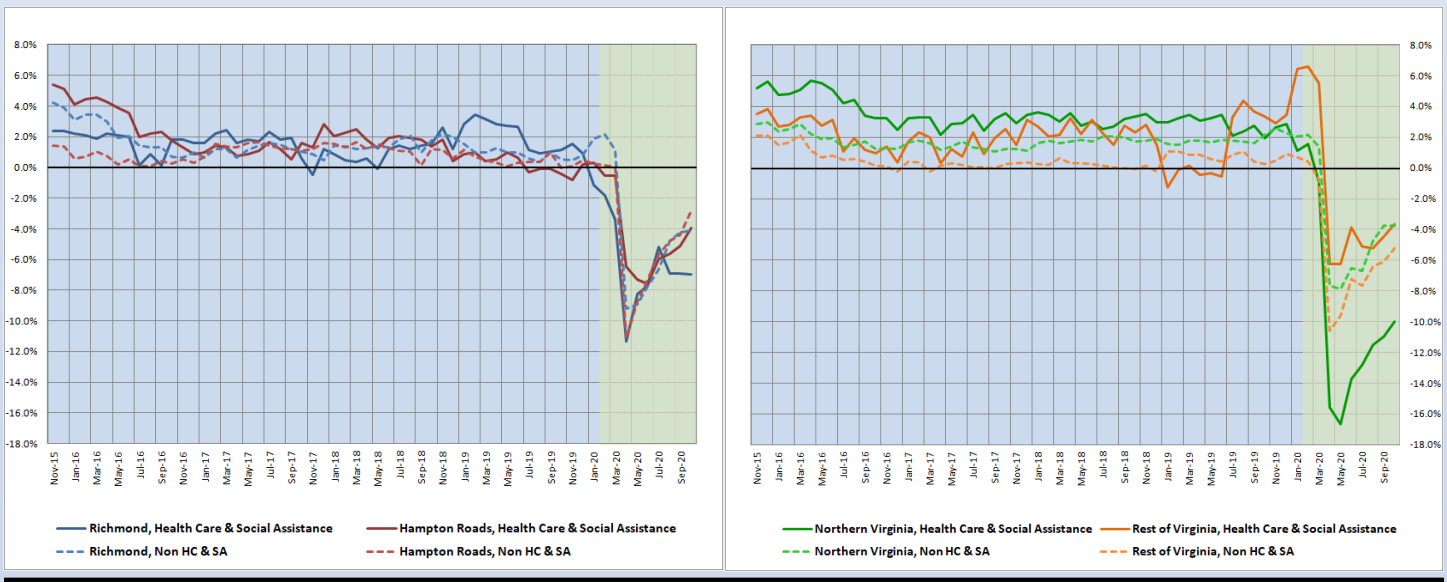
According to the preliminary data released on Friday, November 20, 2020, by the U.S. Department of Labor, Bureau of Labor Statistics, Health Care & Social Assistance (HC&SA) employment growth was widely distributed across the entire state during the month. In fact, October was the first month in 2020 in which every region in the state made a positive contribution to statewide HC&SA employment growth. Northern Virginia’s HC&SA sector made the single largest contribution, creating 2,100 new jobs during the month. This gain represents a one-month annualized employment growth rate of 22.6%.

Hampton Roads enjoyed even faster HC&SA employment growth during the month. With 1,700 new HC&SA jobs created in October, Hampton Roads increased employment at a 25.1% annualized rate during the month. The Rest of Virginia also made a significant contribution to statewide HC&SA employment growth in October with the addition of 1,900 new HC&SA jobs, while Richmond’s HC&SA sector added 500 jobs during the month.

Year-Over-Year Regional Employment Growth

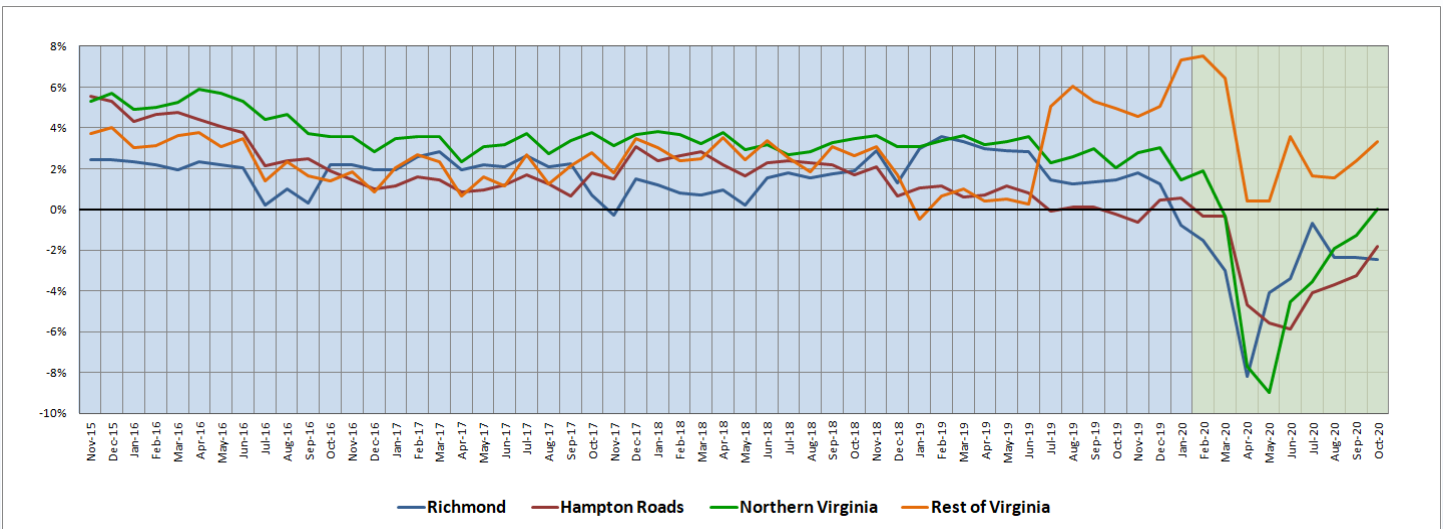
Although every region in the state increased HC&SA employment in October, all of these regions still have a long way to go to recover the job losses caused by the onset of the coronavirus pandemic earlier this year. The Rest of Virginia still has the fastest year-over-year HC&SA employment growth rate in the state, but it still remains firmly negative at -3.67%. Hampton Roads is experiencing a similar improvement, but it continues to trail behind the Rest of Virginia’s HC&SA sector with a year-over-year growth rate of -3.97%. Meanwhile, Northern Virginia saw its year-over-year HC&SA employment growth rate increase to -9.97%, while the comparable growth rate for Richmond actually fell slightly to -7.00%.

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 dramatic long-term decline in HC&SA employment in Virginia is due almost entirely to the unprecedented job losses that occurred in April as a result of the coronavirus pandemic. When April’s losses are smoothed out with the subsequent employment growth during the recovery, a more optimistic picture emerges. The Rest of Virginia continues to enjoy the highest 12-month employment growth rate moving average, which increased from 2.37% to 3.31% in October. At the same time, Northern Virginia’s own moving average turned positive for the first time since February after increasing from -1.25% to 0.03% during the month. Meanwhile, Hampton Roads experienced a large increase in its 12-month employment growth rate moving average from -3.24% to -1.80%, but Richmond saw its moving average fall slightly from -2.38% to -2.45%.

Subsector Employment Growth

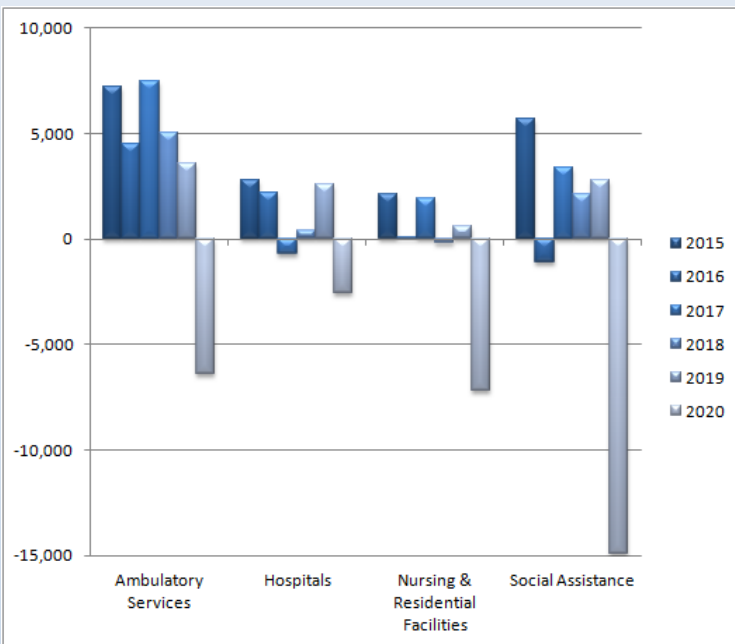


Figure 4: Annual & YTD Change in HC&SA Subsector Employment (Not Seasonally Adjusted, Full-Year Change for 2015-2019, Year-to-Date Change for 2020).

As with Virginia’s four major regions, all four of Virginia’s HC&SA subsectors enjoyed positive employment growth in October. This growth was most pronounced in Ambulatory Health Care Services. After creating 2,200 jobs in September, this HC&SA subsector experienced even stronger growth in October thanks to the creation of an additional 4,000 jobs during the month. Ambulatory Health Care Services has enjoyed by far the strongest employment recovery over the past six months. Since May, this subsector has created 21,400 jobs. With these gains, Ambulatory Health Care Services has recovered 90% of its total employment losses from April.

Social Assistance also experienced strong employment growth in October with the creation of 1,400 new jobs during the month. Regardless, Social Assistance has still suffered considerably larger job losses than Virginia’s three other HC&SA subsectors so far this year. Meanwhile, Nursing & Residential Care Facilities created 500 jobs in October, and Hospital added 300 jobs during the month.

Distribution of Growth by Subsector

Not Seasonally Adjusted	Employment, in Thousands				Growth Rate, Annualized		
	Oct. 2019	July 2020	Sept. 2020	Oct. 2020	12 Month	3 Month	1 Month
Virginia							
Health Care & Social Assistance	462.8	425.2	427.7	433.9	-6.2%	8.4%	18.9%
<i>Ambulatory Health Care Services</i>	189.4	180.3	181.9	185.9	-1.8%	13.0%	29.8%
<i>Hospitals</i>	108.2	104.9	105.8	106.1	-1.9%	4.7%	3.5%
<i>Nursing & Residential Care Facilities</i>	78.2	72.3	70.9	71.4	-8.7%	-4.9%	8.8%
<i>Social Assistance</i>	87.0	67.7	69.1	70.5	-19.0%	17.6%	27.2%
Hampton Roads							
Health Care & Social Assistance	95.7	89.8	90.2	91.9	-4.0%	9.7%	25.1%
<i>Hospitals</i>	22.4	21.6	22.0	22.0	-1.8%	7.6%	0.0%
Northern Virginia							
Health Care & Social Assistance	138.4	119.7	122.5	124.6	-10.0%	17.4%	22.6%
<i>Ambulatory Health Care Services</i>	67.2	58.8	60.8	62.7	-6.7%	29.3%	44.7%
<i>Hospitals</i>	26.6	25.2	25.6	25.8	-3.0%	9.9%	9.8%

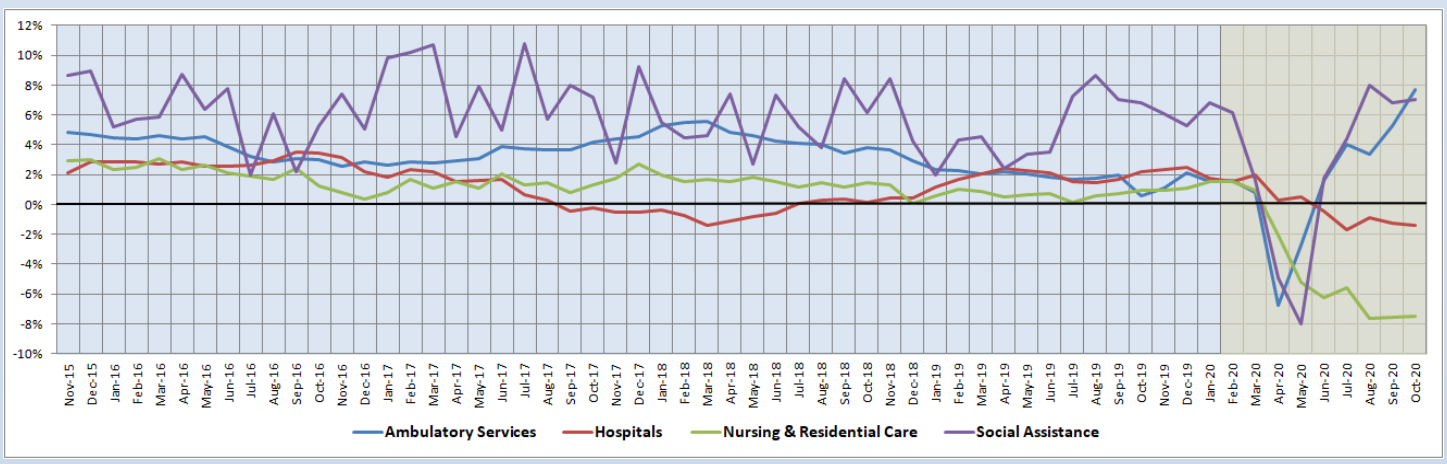
Preliminary estimates are italicized

Both Ambulatory Health Care Services and Social Assistance have experienced very strong employment growth in recent months. Ambulatory Health Care Services increased employment at a 29.8% annualized rate in October, while employment in Social Assistance grew at a 27.2% annualized rate during the month. Their three-month annualized employment growth rates are also well above the statewide HC&SA average. Over the past three months, Social Assistance has grown employment at a 17.6% annualized rate. At the same time, Hospitals have increased employment at a 13.0% annualized rate. Regardless, no HC&SA subsector in Virginia has increased employment over the past 12 months.

12-Month Average Employment Growth by Subsector

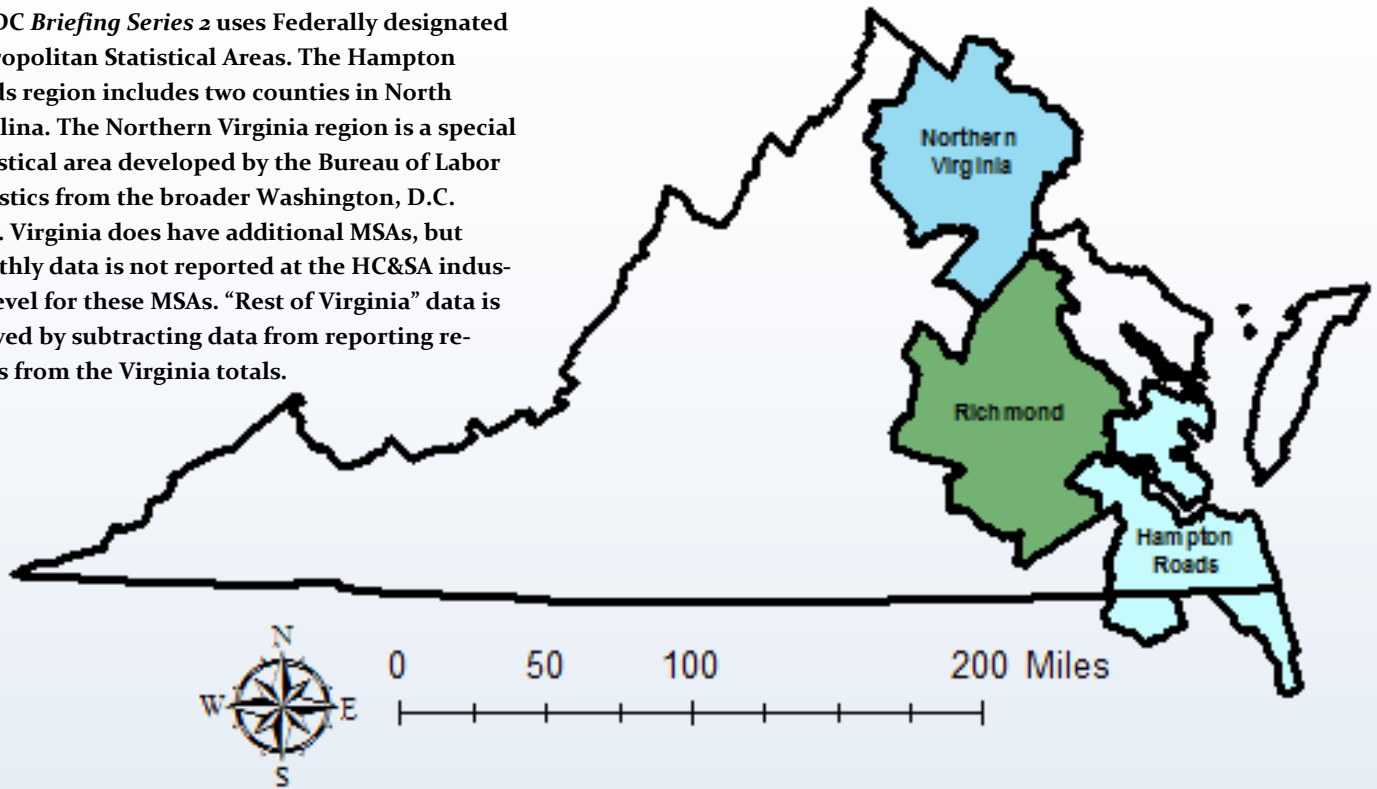
Given their impressive job gains in October, Ambulatory Health Care Services and Social Services saw their respective 12-month employment growth rate moving average diverge even more sharply from those of Virginia’s two other HC&SA subsectors. Ambulatory Health Care Services experienced a significant increase in its 12-month employment growth rate moving average from 5.30% to 7.68%, while that of Social Services rose more modestly from 6.85% to 7.04%. Nursing & Residential Care Facilities also saw a modest increase in its 12-month employment growth rate moving average from -7.58% to -7.51% in October, but the comparable moving average for Hospitals fell from -1.25% to -1.43% during the month.

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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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).

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)