



Virginia Healthcare Workforce Briefs

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

Series 2, Issue 102

September 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.
- ◆ While Northern Virginia was the only region in the state that failed to increase HC&SA employment in July, it was also the only region that created HC&SA jobs in August. Northern Virginia's HC&SA sector created 900 jobs in August, a gain that translates into a 9.4% annualized growth rate. On the other hand, Richmond's HC&SA sector lost 800 jobs, while HC&SA employment in the Rest of Virginia fell by 700. Hampton Roads experienced no HC&SA employment change in August.
- ◆ Social Assistance experienced its third consecutive month of positive employment growth in August thanks to the creation of 1,300 new jobs during the month. This gain represents a one-month annualized employment growth rate of 25.6%. At the same time, Hospitals added 400 new jobs in August, which translates into a 4.7% annualized growth rate. However, Ambulatory Health Care Services and Nursing & Residential Care Facilities lost 1,500 jobs and 800 jobs, respectively, in August.

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		
	Aug. 2019	May 2020	July 2020	Aug. 2020	12 Month	3 Month	1 Month
Virginia							
Total Nonfarm	4,064.6	3,701.2	3,788.8	3,845.9	-5.4%	16.6%	19.7%
Health Care & Social Assistance	460.5	410.5	425.2	424.6	-7.8%	14.5%	-1.7%
Hampton Roads							
Total Nonfarm	800.4	728.8	754.5	760.1	-5.0%	18.3%	9.3%
Health Care & Social Assistance	95.9	89.0	89.8	89.8	-6.4%	3.6%	0.0%
Northern Virginia							
Total Nonfarm	1,519.5	1,387.1	1,413.1	1,436.2	-5.5%	14.9%	21.5%
Health Care & Social Assistance	137.2	115.2	119.7	120.6	-12.1%	20.1%	9.4%
Richmond							
Total Nonfarm	686.3	625.1	642.3	649.8	-5.3%	16.8%	14.9%
Health Care & Social Assistance	87.0	80.1	82.5	81.7	-6.1%	8.2%	-11.0%
Rest of Virginia							
Total Nonfarm	1,058.4	960.2	978.9	999.8	-5.5%	17.5%	28.9%
Health Care & Social Assistance	140.4	126.2	133.2	132.5	-5.6%	21.5%	-6.1%

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

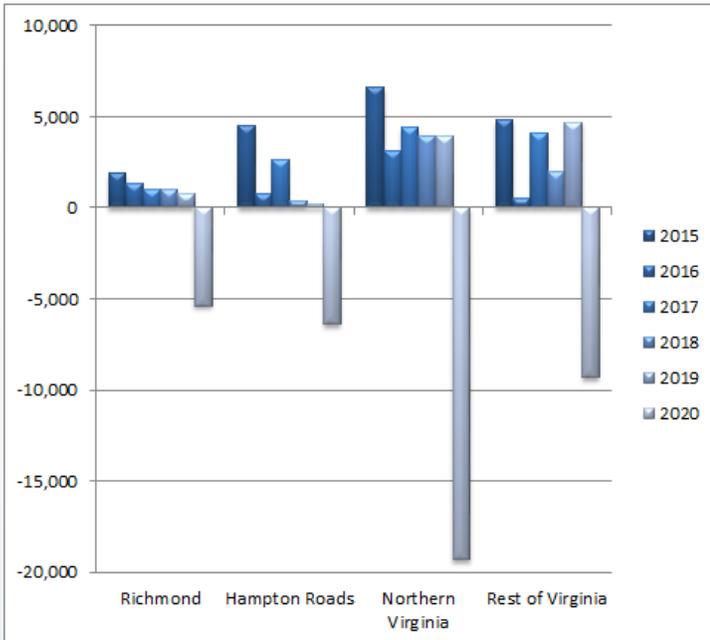


Figure 1: Annual & YTD Change in HC&SA Regional Employment (Not Seasonally Adjusted, Full-Year Change for 2015-2019, Year-to-Date Change for 2020).

According to the preliminary data released on Friday, September 18, 2020, by the U.S. Department of Labor, Bureau of Labor Statistics, Northern Virginia was the only region in the state that increased HC&SA employment in August. This region created 900 new jobs in August, a gain that represents a one-month annualized employment growth rate of 9.4%. Even though Northern Virginia’s HC&SA sector failed to increase employment in July, this region has still created 5,400 jobs over the past three months, which translates into a 20.1% annualized growth rate. Only the Rest of Virginia has increased HC&SA employment at a faster rate since June.

Regardless, the Rest of Virginia, which had increased HC&SA employment in each of the previous three months, lost 700 HC&SA jobs in August. Likewise, Richmond’s HC&SA sector experienced a decline in employment for the first time since April after losing 800 jobs during the month. As for Hampton Roads, its HC&SA sector did not experience any employment change in August.

Year-Over-Year Regional Employment Growth

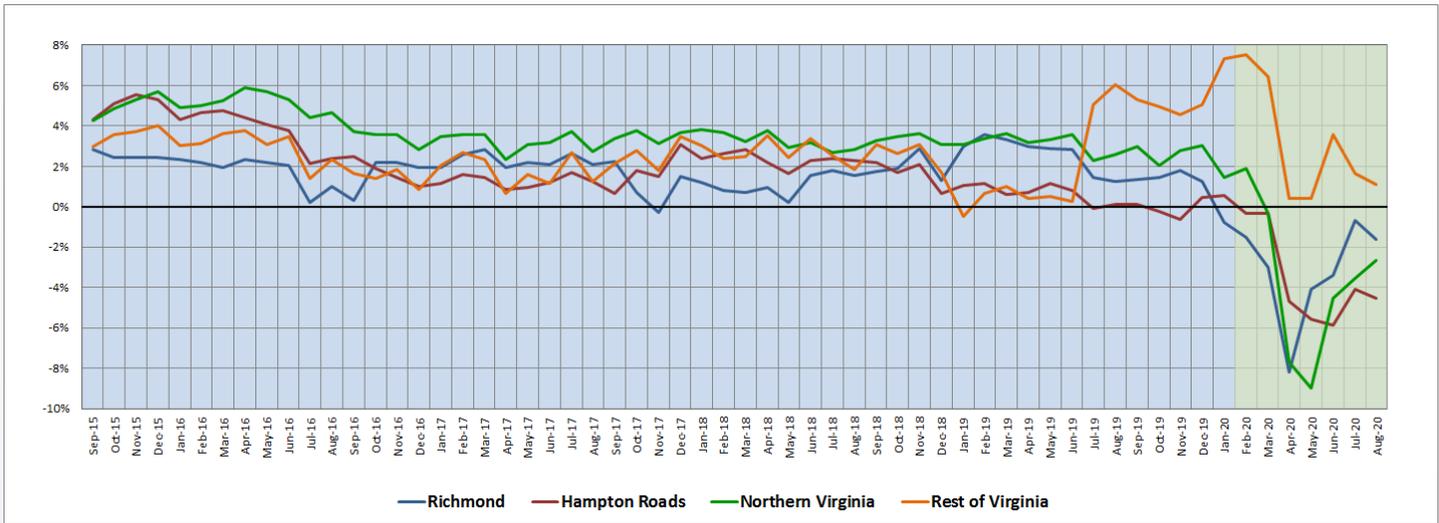
In August, there were no dramatic changes in the year-over-year HC&SA employment growth rates of Virginia’s four regions. Northern Virginia was the only region that experienced an increase in its year-over-year HC&SA employment growth rate, which rose slightly from -12.82% to -12.10% in August. Regardless, long-term HC&SA employment growth in Northern Virginia remains far below that of the state’s three other regions. Richmond saw its year-over-year HC&SA employment growth rate fall from -5.17% to -6.09%, while the comparable growth rate for Hampton Roads fell from -5.97% to -6.36%. Meanwhile, the Rest of Virginia experienced a decline in its own growth rate from -5.13% to -5.63%.

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).



Although the Rest of Virginia saw its 12-month HC&SA employment growth rate moving average fall from 1.63% to 1.12% in August, it still remains far higher than the comparable moving averages elsewhere in the state. Richmond and Hampton Roads also experienced declines in their respective moving averages during the month. After reaching its highest level so far this year in July at -0.70%, Richmond’s 12-month HC&SA employment growth rate moving average fell back to -1.62% in August. As for Hampton Roads, its 12-month HC&SA employment growth rate moving average dipped slightly in August from -4.10% to -4.53%. Only Northern Virginia experienced an increase in its 12-month HC&SA employment growth rate moving average, which rose from -3.52% to -2.66% during the month.

Subsector Employment Growth

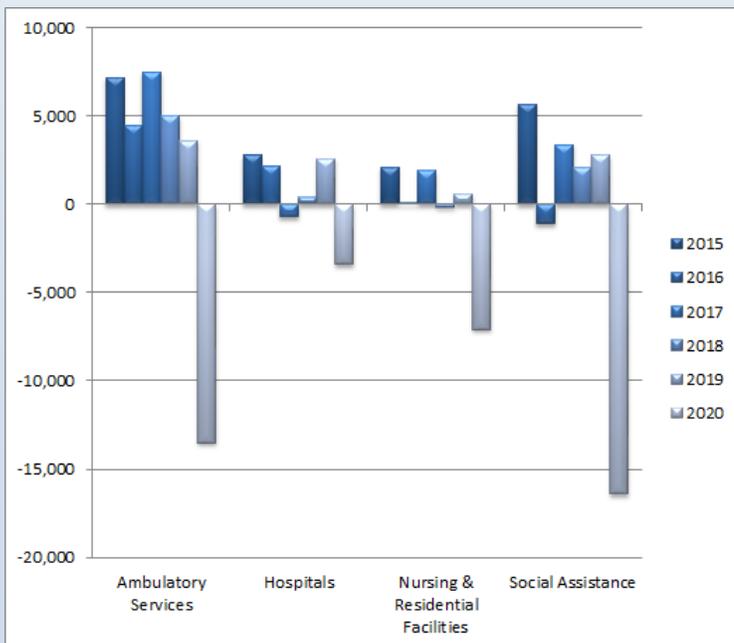


Figure 4: Annual & YTD Change in HC&SA Subsector Employment (Not Seasonally Adjusted, Full-Year Change for 2015-2019, Year-to-Date Change for 2020).

Among Virginia’s four HC&SA subsectors, only Social Assistance has enjoyed positive employment growth in each of the past three months. In August, this HC&SA subsector created 1,300 new jobs. With this gain, Social Assistance has increased employment by 9,000 since June. Regardless, Social Assistance has still not recovered all of its employment losses from earlier this year. Between March and May, Social Assistance lost 26,000 jobs. Due to these employment losses, Social Assistance has lost more jobs than any other HC&SA subsector in the state so far this year.

Hospitals also enjoyed positive employment growth in August with the creation of 400 new jobs. Meanwhile, the strong employment recovery in Ambulatory Health Care Services experienced a temporary setback as this subsector lost 1,500 jobs in August. As for Nursing & Residential Care Facilities, this HC&SA subsector has not experienced a job recovery. With 800 jobs lost in August, Nursing & Residential Care Facilities has now seen employment fall in each of the past six months.

Distribution of Growth by Subsector

Not Seasonally Adjusted	Employment, in Thousands				Growth Rate, Annualized		
	Aug. 2019	May 2020	July 2020	Aug. 2020	12 Month	3 Month	1 Month
Virginia							
Health Care & Social Assistance	460.5	410.5	425.2	424.6	-7.8%	14.5%	-1.7%
<i>Ambulatory Health Care Services</i>	190.4	170.3	180.3	178.8	-6.1%	21.5%	-9.5%
<i>Hospitals</i>	107.3	107.3	104.9	105.3	-1.9%	-7.2%	4.7%
<i>Nursing & Residential Care Facilities</i>	78.2	72.9	72.3	71.5	-8.6%	-7.5%	-12.5%
<i>Social Assistance</i>	84.6	60.0	67.7	69.0	-18.4%	74.9%	25.6%
Hampton Roads							
Health Care & Social Assistance	95.9	89.0	89.8	89.8	-6.4%	3.6%	0.0%
<i>Hospitals</i>	22.3	22.2	21.6	21.7	-2.7%	-8.7%	5.7%
Northern Virginia							
Health Care & Social Assistance	137.2	115.2	119.7	120.6	-12.1%	20.1%	9.4%
<i>Ambulatory Health Care Services</i>	67.6	55.1	58.8	59.3	-12.3%	34.2%	10.7%
<i>Hospitals</i>	26.3	25.6	25.2	25.5	-3.0%	-1.6%	15.3%

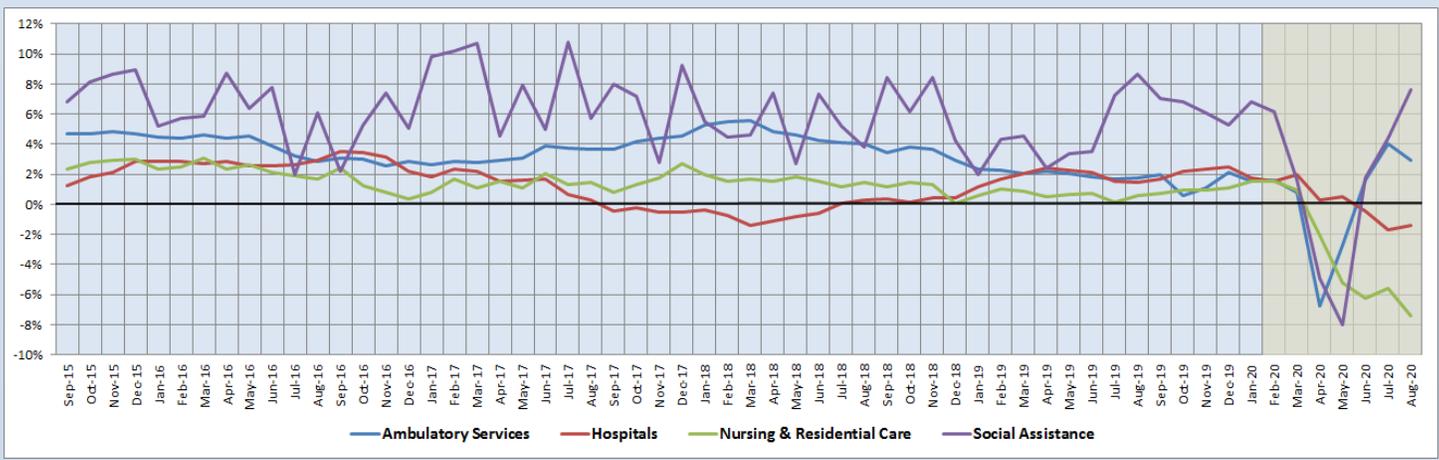
Preliminary estimates are italicized

Although the statewide lockdown measures have led to negative long-term employment growth in all four of Virginia’s HC&SA subsectors, these effects have been most intensely felt in Social Assistance. Employment in this HC&SA subsector has fallen by 18.4% over the past year. However, Social Assistance has also been the HC&SA subsector that has enjoyed the strongest post-lockdown job recovery. Over the past three months, employment in Social Assistance has grown at a remarkable 74.9% annualized rate. Ambulatory Health Care Services have been the only other HC&SA subsector that has increased employment since June. This subsector’s current three-month annualized employment growth rate is 21.5%.

12-Month Average Employment Growth by Subsector

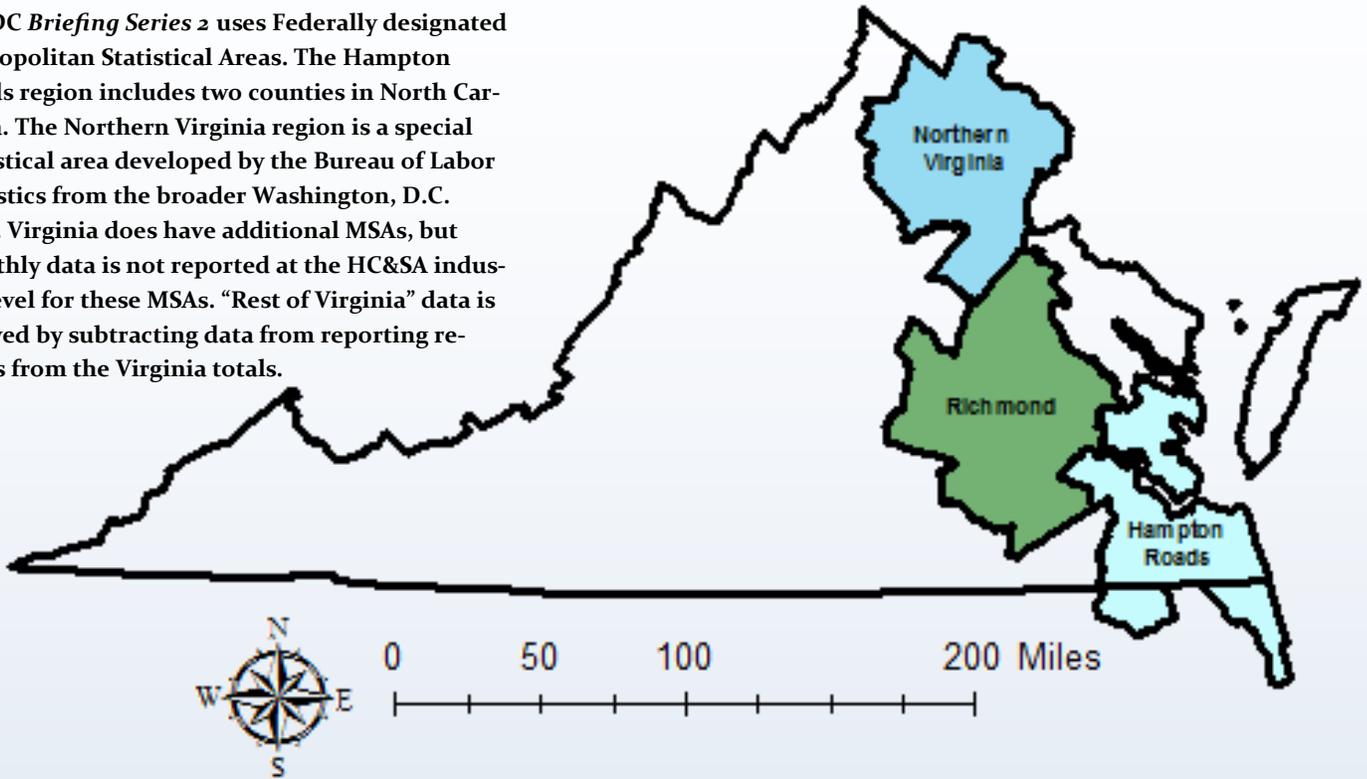
In May, Social Assistance saw its 12-month employment growth rate moving average fall to -8.01%. At the time, no other HC&SA subsector in the state had a lower moving average. However, this moving average has grown significantly since then. In August, it increased from 4.38% to a one-year high of 7.62%. Ambulatory Health Care Services remain the only other HC&SA subsector with a positive 12-month employment growth rate moving average, although it did fall in August from 4.03% to 2.91%. Nursing & Residential Care Facilities saw their 12-month employment growth rate moving average fall from -5.56% to -7.41%, while the comparable average for Hospitals increased from -1.67% to -1.38%.

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).