



# 2020: YEAR IN REVIEW

**NOVA**  
Northern Virginia  
Community College



# NORTHERN VIRGINIA'S ECONOMY IN 2020



**As one of the largest higher education and workforce training providers in the region, Northern Virginia Community College (NOVA) closely tracks local economic trends to ensure that its programs and services are data-driven and responsive to shifts in both employer demand and student needs. The start of the new year offers the opportunity to reflect on the trajectory of these trends over the course of the past 12 months and anticipate what they may mean for the months to come.**

**Of course, it would be an understatement to say that the arrival of the global COVID-19 pandemic in early 2020 resulted in significant global economic disruption, and any reflection on the year must inevitably address its effects. In addition to providing an overview of key economic and workforce indicators, this report examines how the pandemic has affected the NOVA region<sup>1</sup> throughout the past year. It concludes by highlighting the efforts of local stakeholders, including NOVA, to maintain a strong regional workforce.**

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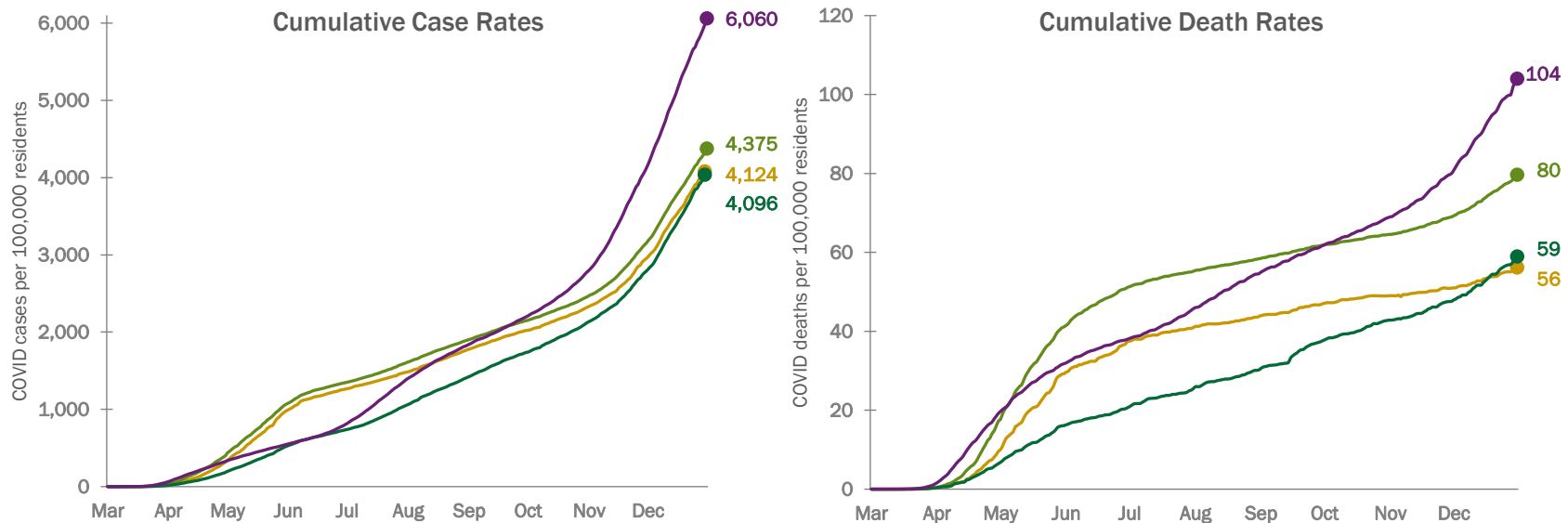
<sup>1</sup> Defined as the nine Northern Virginia jurisdictions served by NOVA: Alexandria City, Arlington County, Fairfax City, Fairfax County, Falls Church City, Loudoun County, Manassas City, Manassas Park City, and Prince William County.



## COVID-19 in the NOVA Region

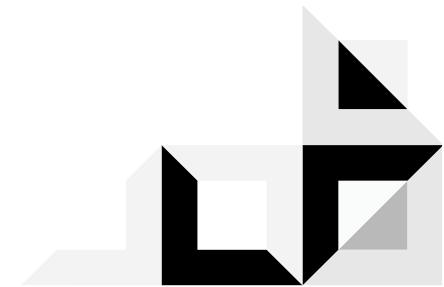
Before examining COVID-19's economic effects, it is important to recognize that our region has so far been more fortunate than many others in terms of the pandemic's severity. The cumulative number of cases in the NOVA region and Washington D.C. metropolitan statistical area (D.C. MSA) initially spiked faster than the rest of Virginia or the country relative to total population. This rate of growth remained relatively steady throughout the summer and early fall while cumulative cases increased more rapidly nationwide. The rate of deaths due to the virus (relative to population) has remained lower in the NOVA region than across the country and the entire D.C. MSA, and was surpassed by the statewide rate in late December after slowing down somewhat during the summer and fall.

*Cumulative COVID case and death rates initially accelerated quickly across the **NOVA region** and **D.C. MSA**, with growth leveling off over the summer while rates across the **United States** surged upwards; rates across **Virginia** have steadily increased and began to approach/pass those in just the NOVA region during December.*



Sources: Virginia Department of Health, *VDH-COVID-19-PublicUseDataset-Cases*, January 25, 2021, <https://www.vdh.virginia.gov/coronavirus/>. || The New York Times, *Coronavirus (Covid-19) Data in the United States*, January 25, 2021, distributed by the Opportunity Insights Economic Tracker, <https://github.com/OpportunityInsights/EconomicTracker>.

*NOTE:* Data represents cumulative daily COVID cases (both confirmed and suspected) and deaths, expressed as rates per 100,000 residents (total population per the Census Bureau's 2019 population estimates).



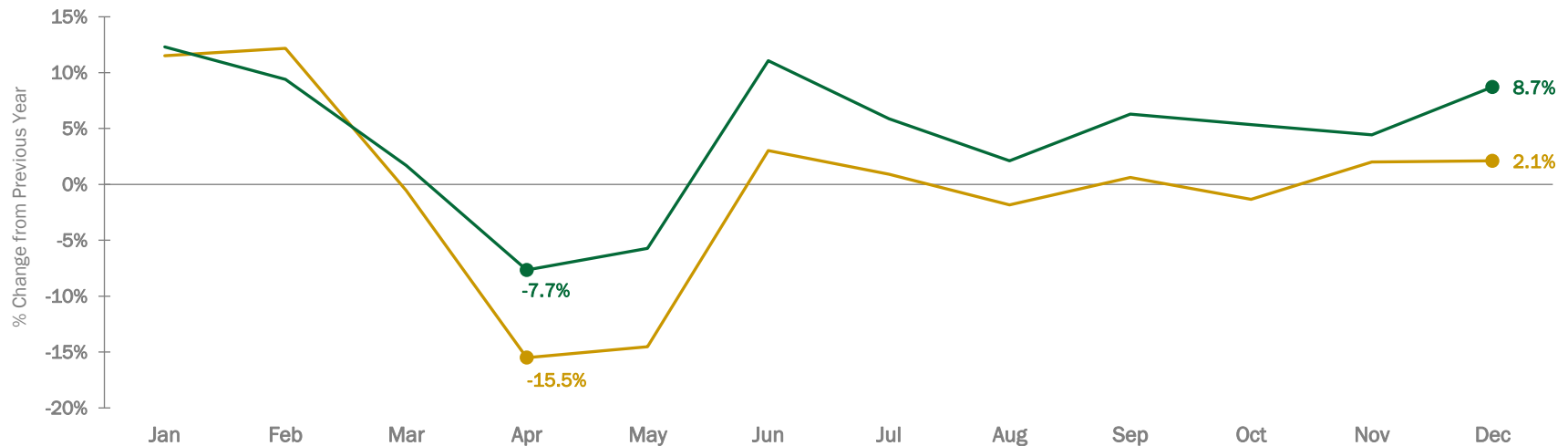
## Economic Activity and Consumer Spending

Despite comparatively moderate COVID-19 rates, especially in the second half of the year, the NOVA region has experienced many of the same economic declines as other parts of the United States, especially other urban areas. The full extent of these local impacts are still being revealed as most federal and state data programs catch up to the rapid changes brought on by the pandemic.<sup>2</sup> However, a few initial indicators of overall economic activity in the region for 2020 are available, particularly surrounding consumer spending.

For example, as of the end of December the total amount of credit and debit card purchases in the NOVA region remained down by around 6-14% from January 2020, depending on locality, compared to around 4% for Virginia and 2% for the entire country over the same period.<sup>3</sup> Local revenues from Virginia's local option sales tax—a one percent general retail sales tax levied by independent cities and counties—also declined significantly for the NOVA region in March, April, and May compared to 2019. Revenues rebounded somewhat in the second half of the year, and then remained relatively flat compared to the previous year.

While local tax revenues declined less significantly across the entire state, the more severe effects of COVID were not felt by other (particularly more rural) jurisdictions until later in the year. Indeed, despite initially jumping back to a pre-pandemic rate of year-over-year growth in June, statewide revenues leveled off at around half of that—roughly 5-6% on average (with a larger uptick in December).

**April revenue from the local option sales tax was down twice as much from 2019 in the NOVA region as it was across Virginia.**



Source: University of Virginia, *Local Option Sales Tax Data*, February 2021, distributed by the Weldon Cooper Center for Public Service, <https://ceps.coopercenter.org/economic-data>.

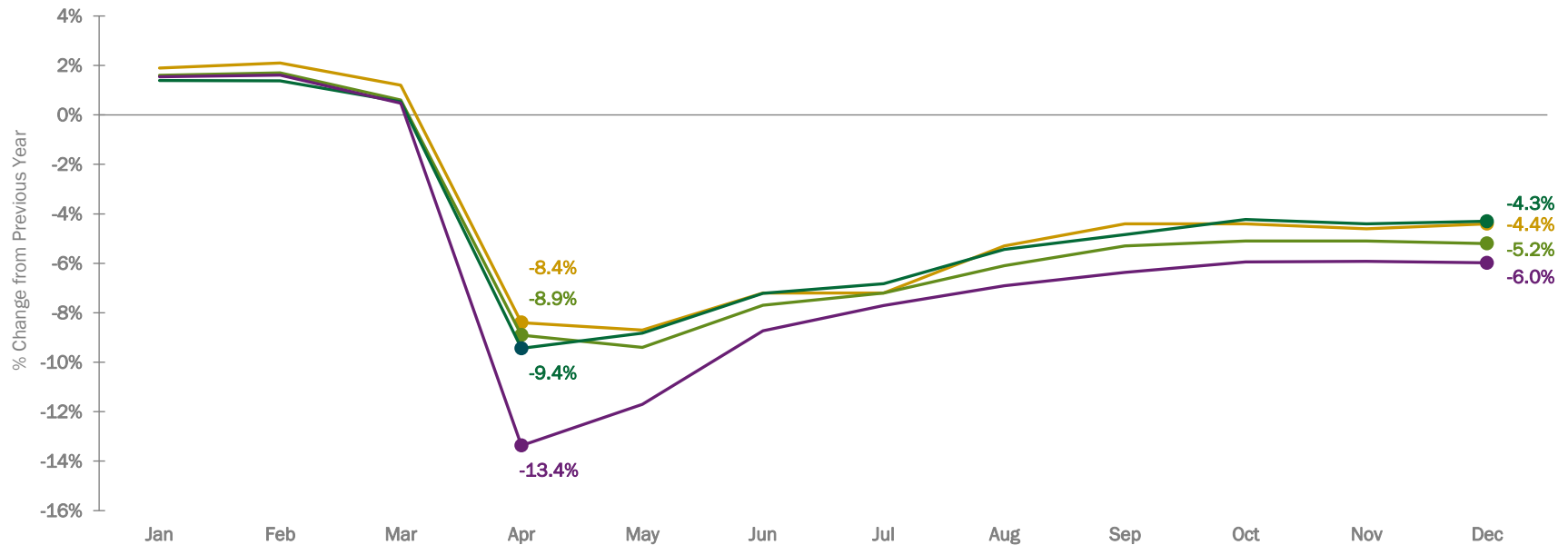
<sup>2</sup> For example, while national and state estimates of gross domestic product (GDP) are released quarterly (most recently, for Quarter 4 of 2020), estimates at the county and metropolitan level are released annually; 2020 estimates will not be released until December 2021.

<sup>3</sup> Based on spending data provided by Affinity Solutions and aggregated by the Opportunity Insights Economic Tracker (<https://tracktherecovery.org/>). Data is seasonally adjusted and indexed to the 1/3/2020-1/31/2020 period.

## Employment

Job losses following the pandemic’s outbreak were historic—between March and April 2020, nearly 132,000 jobs (not including those in farming) were lost in Northern Virginia, while 300,000 were lost across the entire D.C MSA. Relatively to total employment however, over-the-year declines in the region and across all of Virginia were initially much less severe than across the entire United States.

*In April 2020, total nonfarm employment was down less significantly compared to the previous year in **Northern Virginia** than across the **United States, Virginia**, and the **D.C. MSA**.*



Sources: U.S. Bureau of Labor Statistics (BLS), *Current Employment Survey (National)*, January 8, 2021, <https://www.bls.gov/ces>. || U.S. BLS, *State and Metro Area Employment, Hours, & Earnings*, February 3, 2021, <https://www.bls.gov/sae/>.

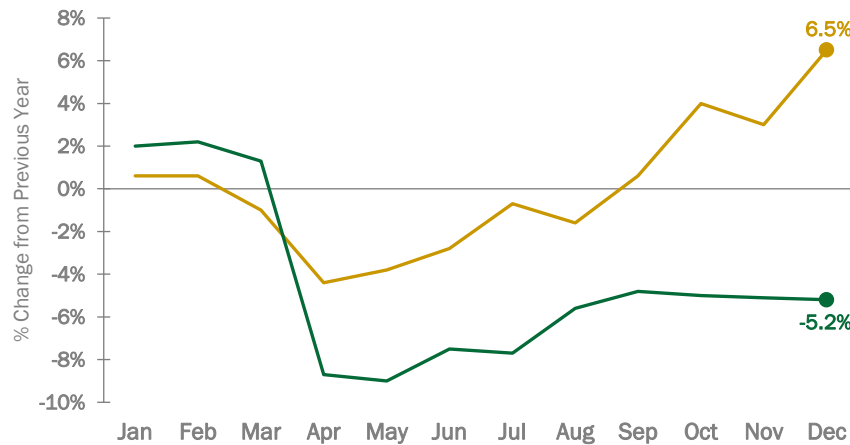
NOTE: Due to data restrictions, “Northern Virginia” includes the nine jurisdictions previously defined as part of the “NOVA region” in addition to Clarke, Culpeper, Fauquier, Rappahannock, Spotsylvania, Stafford, and Warren counties, as well as Fredericksburg City, Virginia. Over-the-year percentage changes based on non-seasonally adjusted, total nonfarm employment. Data for December is preliminary.

Unsurprisingly, goods producing industries fared better in Northern Virginia in 2020 than those involved in providing services. Over-the-year employment declines among goods producing establishments were less severe than those among service-providing establishments, which are more likely to be reliant on in-person contact and, therefore, more adversely affected by social distancing restrictions. That said, goods producing industries represent less than 10% of employment in the region, so losses in service-providing industries largely outweighed their gains.

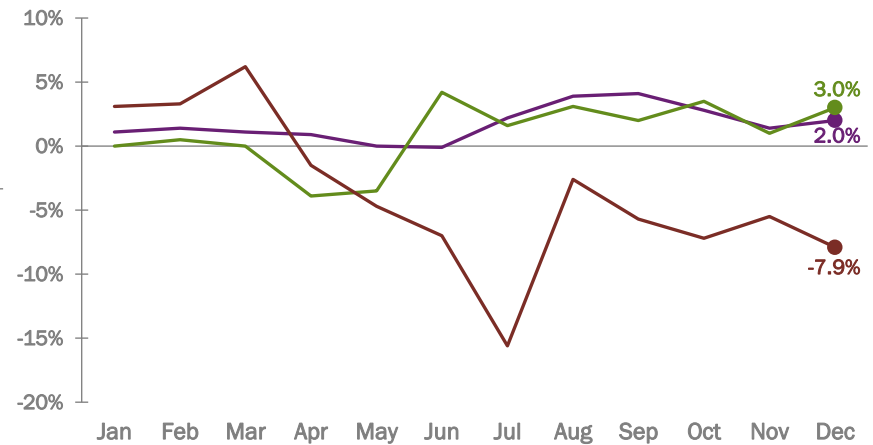


Despite overall concerns that budget shortfalls will lead to ongoing employment losses in the public sector, both federal and state employment in Northern Virginia maintained relatively steady (although minimal) growth over the course of the year. However, state government employment across all of Virginia declined substantially (-8% as of December, compared to +3% in Northern Virginia). Local government employment declined significantly compared to the previous year in Northern Virginia as well as across the entire state.

**Service-Providing** industries in Northern Virginia experienced a larger and more protracted decline in employment than **Goods Producing** industries.



**Local Government** employment declined significantly and has remained depressed, while **State** and **Federal** employment in Northern Virginia were slightly above 2019 levels by December.



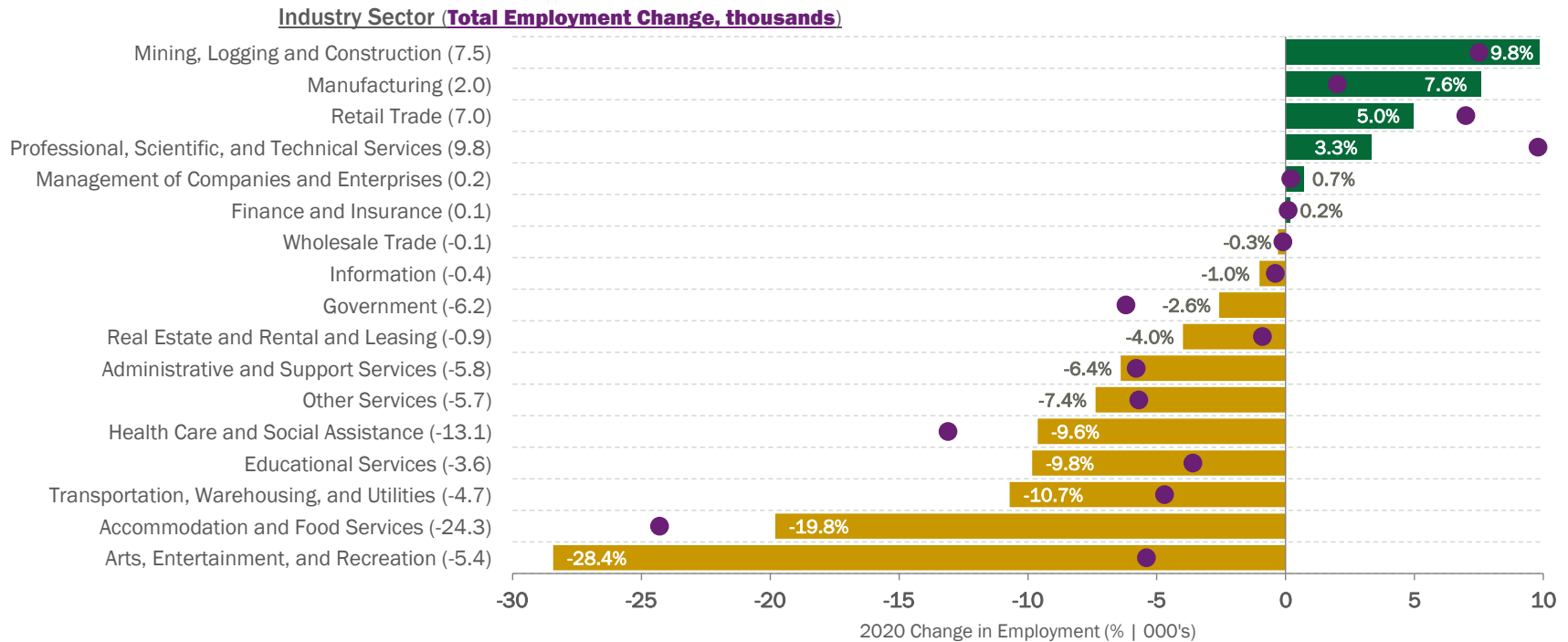
Source: U.S. BLS, *State and Metro Area Employment, Hours, & Earnings*, February 3, 2021, <https://www.bls.gov/sae/>.

NOTE: Due to data restrictions, “Northern Virginia” includes the nine jurisdictions previously defined as part of the “NOVA region” in addition to Clarke, Culpeper, Fauquier, Rappahannock, Spotsylvania, Stafford, and Warren counties, as well as Fredericksburg City, Virginia. Over-the-year percentage changes based on non-seasonally adjusted employment. Data for December is preliminary.

Among the service-providing industries most severely impacted by employment declines over the entire year were those in the “accommodation and food services” as well as the “arts and entertainment” sectors, although the former experienced the largest total decline in the region, losing 24,300 jobs. Goods producing industries in mining, construction, and manufacturing saw the largest proportional gains in employment over the year. Employment in professional and technical services, which remains the largest sector as a share of the regional workforce, saw the largest total gains, adding another 9,800 jobs over the course of the year. Despite the impacts of COVID on consumer spending, the retail trade sector also grew (adding roughly 7,000 jobs), which may be a function of increased employment at essential retail establishments such as grocery stores (NAICS 4451), or those involved in online retail such as Amazon distribution centers (categorized under “electronic shopping,” NAICS 4541).



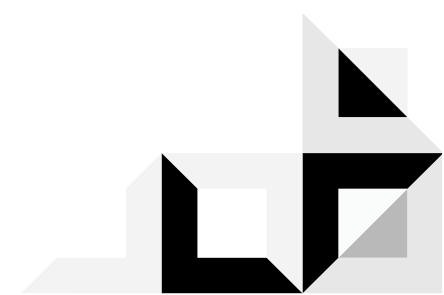
Service-providing sectors related to hospitality and entertainment experienced the largest **percentage employment losses** in Northern Virginia over 2020, while goods producing sectors such as construction and manufacturing experienced the largest **percentage employment gains**; accommodation and food services experienced largest **total employment change** (a decline) while professional and technical services saw the largest employment gain.



Source: U.S. BLS, *State and Metro Area Employment, Hours, & Earnings*, February 3, 2021, <https://www.bls.gov/sae/>.

NOTE: Due to data restrictions, "Northern Virginia" includes the nine jurisdictions previously defined as part of the "NOVA region" in addition to Clarke, Culpeper, Fauquier, Rappahannock, Spotsylvania, Stafford, and Warren counties, as well as Fredericksburg City, Virginia. Change based on non-seasonally adjusted nonfarm employment. Data for December is preliminary.

Taken as a whole, these trends reinforce the extent to which the NOVA region's economy and labor force continue to rely more heavily on professional services, business services, and government activities than consumer-facing services. This industry make-up has insulated the NOVA region from some of the more severe labor market impacts experienced by other tourism- or retail-dependent regional economies. Having maintained a larger share of its employment base, the region may be better positioned than many other areas to weather the COVID-19 recession.

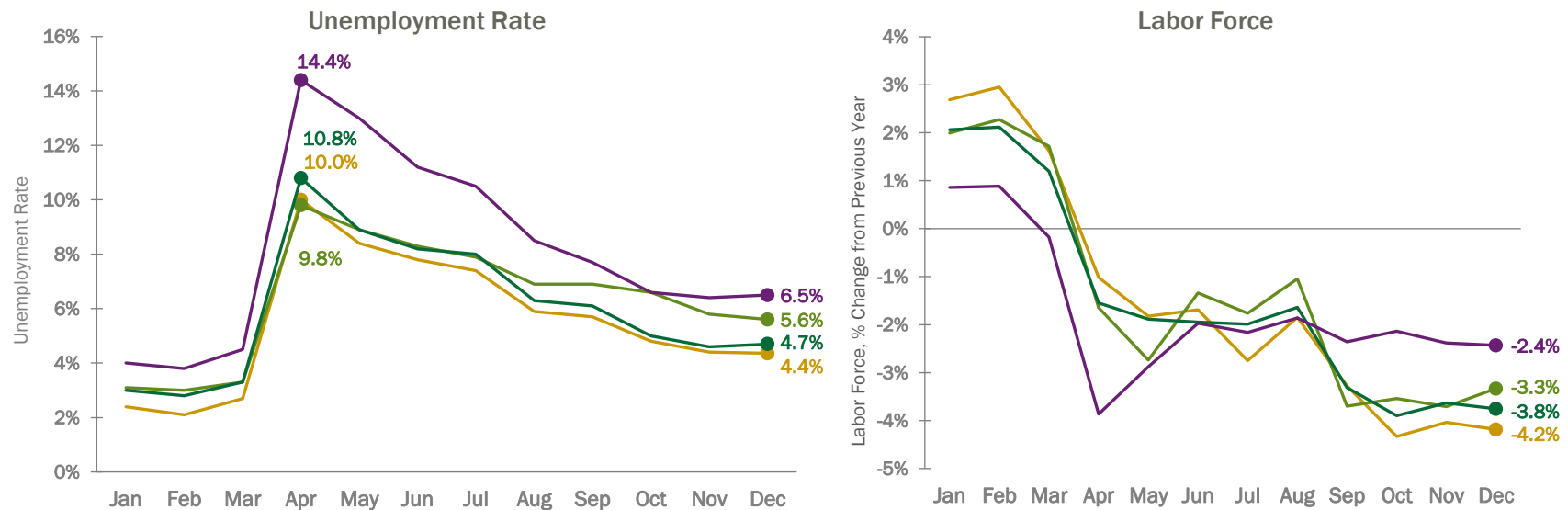


## Unemployment

This is also evident when looking at unemployment trends over the past year. The NOVA region has historically experienced lower overall unemployment rates than the rest of Virginia, D.C. MSA, and United States—despite COVID-19’s impact and regional unemployment reaching a peak of 139,000 in April, this trend continued into 2020. As others have noted, however, the official unemployment rate—which measures individuals who are without a job but actively looking for work as a share of the labor force (i.e. all individuals over 16 that are either employed or unemployed)—may understate the total extent of job losses, especially in the current recession.<sup>4</sup>

For example, the region’s labor force experienced larger over-the-year declines in the later months of 2020 than the rest of the United States. This indicates that a greater share of individuals who have lost jobs in the region have likely exited the labor force entirely—that is, they are neither employed nor actively looking for employment (if unemployed). These disconnected workers often face greater challenges in returning to employment. As a result, a larger share of labor force exits may lead, in part, to a longer recovery.

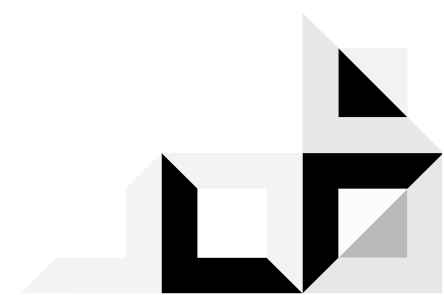
*Unemployment in the **NOVA region** was consistently on par with or below rates across **Virginia**, the **D.C. MSA**, and the **United States** throughout 2020. Over-the-year change in the total labor force, while initially less depressed in the NOVA region, fell below these other areas towards the end of the year.*



Source: U.S. BLS, *Local Area Unemployment Statistics*, February 3, 2021, <https://www.bls.gov/lau>.

NOTE: Data for December is preliminary. Not seasonally adjusted.

<sup>4</sup> Rachel Siegel, “Fed chair: Unemployment rate was closer to 10 percent, not 6.3 percent, in January,” *The Washington Post*, February 10, 2021, <https://www.washingtonpost.com/business/2021/02/10/powell-unemployment-january/>

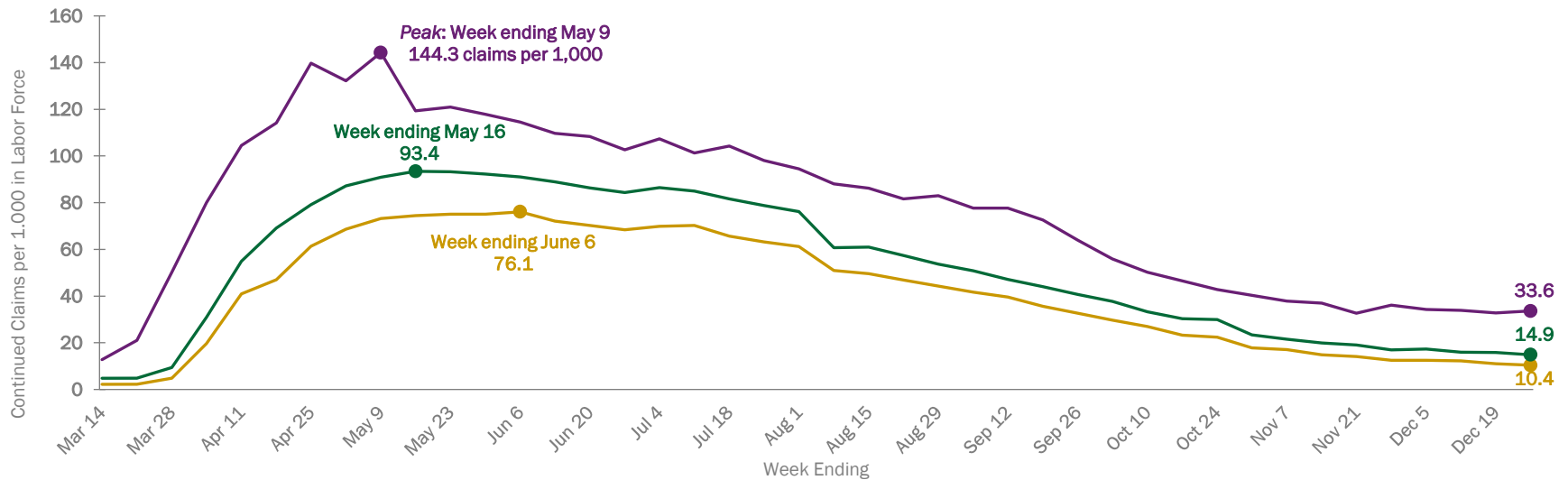




Before examining trends in claims for unemployment insurance, it is worth clarifying the difference between *continued* and *initial* claims. Continued claims are those submitted by workers who filed for unemployment coverage in the preceding weeks, while initial claims are those submitted by workers filing for the first time. As a result, continued claims represent persistent usage of benefits, while initial claims represent the total influx of individuals seeking benefits. These are both distinct from the overall unemployment rate, which is defined and measured separately. For example, some individuals can still claim unemployment insurance if they remain employed but have experienced reduced hours. Also, not all claims that are submitted may ultimately be eligible for benefits.

With this in mind, a little over 305,000 initial unemployment claims were filed in the NOVA region from the week ending March 14, 2020 through the week ending January 2, 2021. While the NOVA region represents about a third of the state’s labor force, it made up under a quarter (22.8%) of the state’s total initial claims over the same period. Similarly, the rate of weekly continued unemployment claims per 1,000 people in the labor force for the NOVA region remained well below the national and Virginia rates throughout the year. These claims also peaked later in the Spring after remaining flat through the middle-to-end of May. These trends indicate that the need for unemployment insurance was less acute in the NOVA region than in others. However, as with the unemployment rate, these numbers may fail to fully capture individuals who have exited the labor force, or those job losses that are otherwise ineligible for insurance benefits.

**The rate of weekly continued unemployment claims in the NOVA region remained below those of Virginia and the United States throughout 2020 and decreased at a steady rate through the end of December.**



Sources: Virginia Employment Commission, *Virginia’s Unemployment Insurance Weekly Claims for Week Ending January 2<sup>nd</sup>*, January 7, 2021, <https://www.vec.virginia.gov/node/12578>. | | United States Department of Labor, *ETA 539: Weekly Claims and Extended Benefits Trigger Data*, January 7, 2021, distributed by Employment & Training Administration, <https://oui.doleta.gov/unemploy/DataDownloads.asp>.

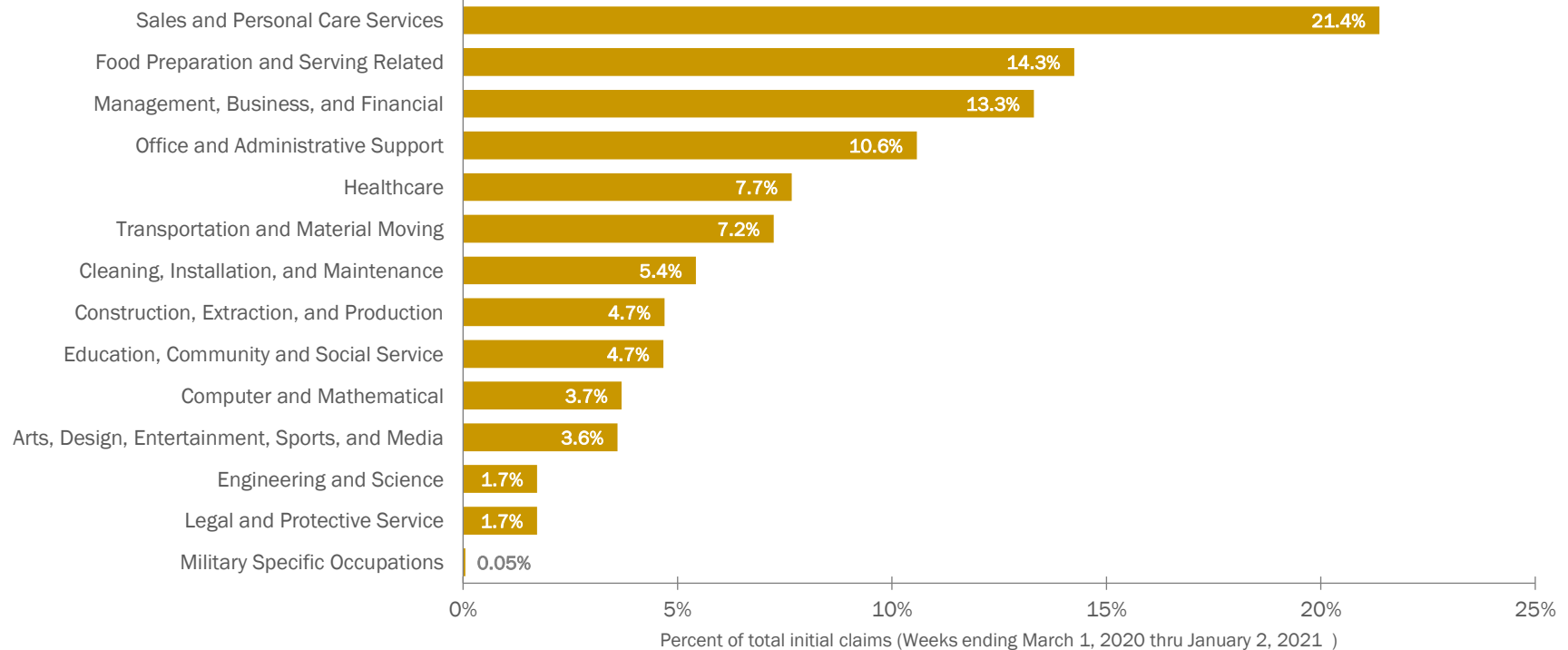
NOTE: Based on non-seasonally adjusted data. Does not include claims from federal pandemic unemployment insurance programs. Virginia data does not include interstate claims.



Of those claimants who reported an occupation, workers in frontline service occupations such as those involved in food preparation and serving or personal care (i.e. hospitality workers, hairdressers, cosmetologists, personal trainers, etc.) made up the largest share of initial claims, representing just under 123,000. As would also be expected, a much smaller share of claims were submitted by workers in individual professional/“white-collar” occupational areas such as engineering, science, computers/information technology, or law, all of which tend to be more able to transition to remote work and are therefore less impacted by stay-at-home orders. Among these occupation areas, the largest share of claims was submitted by those in management, business, and financial occupations, totaling 46,000 claims.

It is important to remember that some claimants may not report their occupation. Also, not all of those submitting initial claims will submit subsequent continued claims, for which occupation information is not currently provided by the state.

**Frontline service occupations made up the largest share (over one-third) of initial unemployment claims in the NOVA region following the start of the pandemic.**



Source: Virginia Employment Commission, *Virginia’s Unemployment Insurance Weekly Claims for Week Ending January 2<sup>nd</sup>*, January 7, 2021, <https://www.vec.virginia.gov/node/12578>.

NOTE: Based on cumulative initial claims from the week ending 3/14/2020 through the week ending 1/2/2021. Classification by occupation based on claimants’ self-reports—not all initial claims are represented based due to missing or misreported occupation data. Includes both intrastate and interstate claims.

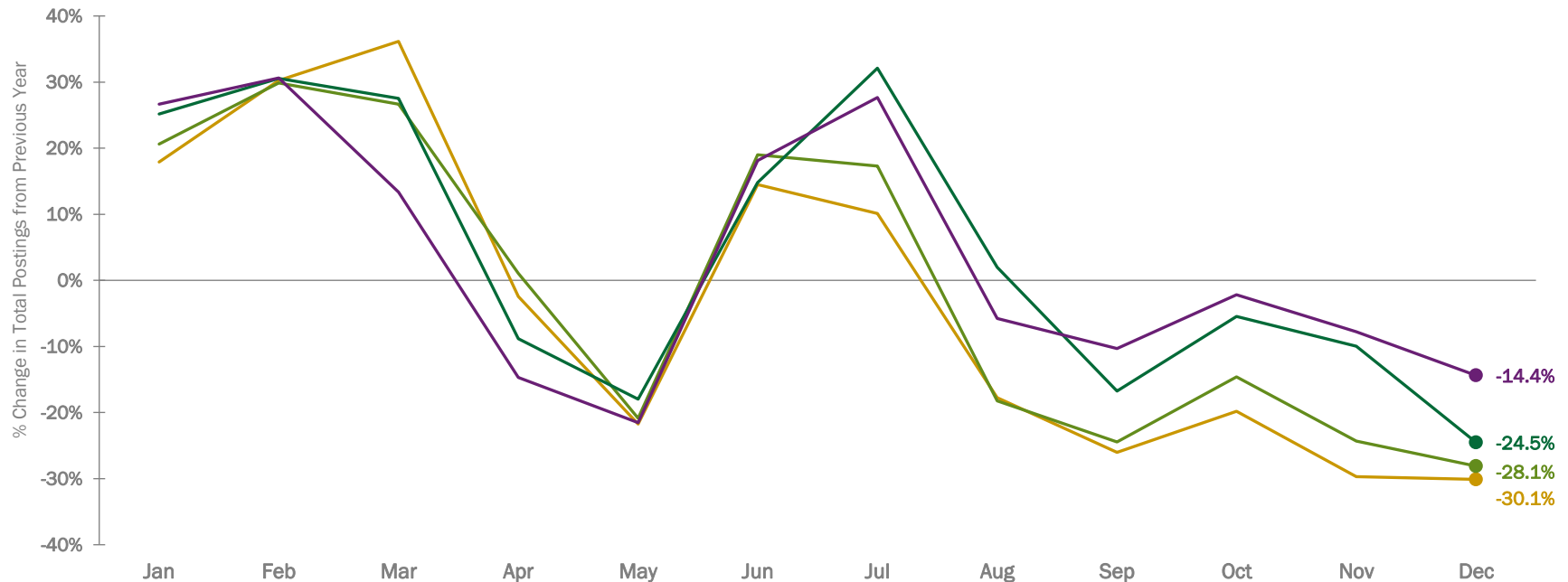


## Job Postings

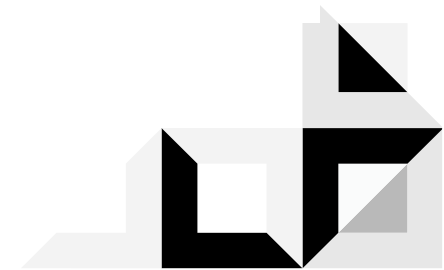
Job postings across both Virginia and the entire United States saw slightly faster over-the-year declines at the outset of the pandemic than those across either the entire D.C. MSA or just the NOVA region. But by May, postings were down by about 20% from the same month in 2019 for all four areas. Postings in the NOVA region remained lower than in these other areas throughout the rest of 2020 and in December the NOVA region's over-the-year decline in postings was roughly twice as large as the decline at the national level.

This may be, in part, a function of the region having lost a smaller share of its jobs relative to other regions in the first place. Following the initial relaxation of statewide stay-at-home orders and re-opening of select businesses at the end of May and into June, any hiring activity would have increased to a larger extent in areas with larger job losses, particularly as more severely impacted industries such as hospitality, personal care services, and retail sought to re-staff some positions in order to meet a slight uptick in consumer spending.

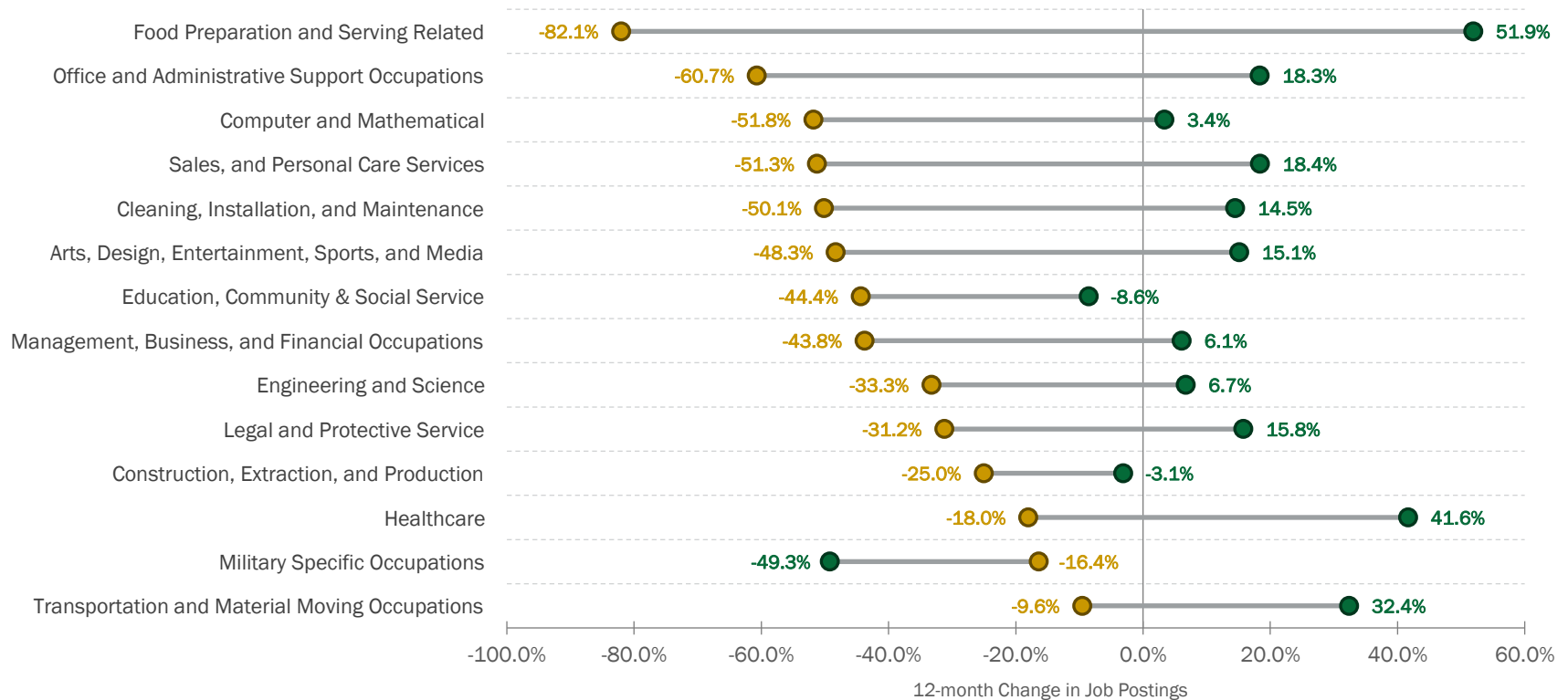
*Over-the-year monthly job posting trends were relatively similar between the **NOVA region, Virginia, D.C MSA** and **United States** over the course of 2020, although the NOVA region experienced a somewhat larger over-the-year decline in the latter months.*



Source: Burning Glass Technologies, Labor Insight, *Monthly Job Postings Trends Report*, January 19, 2021, <https://www.burning-glass.com/products/labor-insight>.

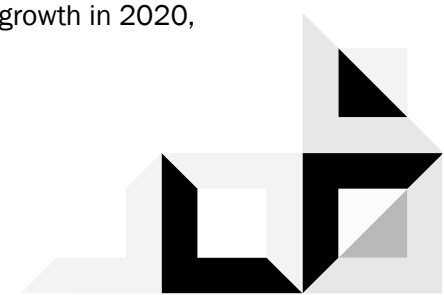


Food preparation and serving occupations in the NOVA region saw the largest decline in job postings over 2020, as well the largest difference from 2019 growth (represented as the bar between the two points).



Source: Burning Glass Technologies, Labor Insight, *Monthly Job Postings Trends Report*, January 19, 2021, <https://www.burning-glass.com/products/labor-insight>.

Food preparation and serving occupations experienced the largest decline in job postings over the course of 2020 in the NOVA region, despite having the largest total growth in 2019 (with the gold point representing the former, and the green point representing the latter on the chart above). Although occupations related to sales and personal care services made up the largest share of post-pandemic unemployment claims in the region, the decline in job postings for these occupations was more moderate. Unexpectedly, computer and mathematical occupations saw a proportionally similar decline. This suggests that while fewer jobs in this area were lost, therefore requiring less re-hiring, hiring for new workers also declined. Hiring in personal care services also fluctuated more widely month-to-month as related businesses went through multiple rounds of restrictions and re-openings. No occupation group experienced job posting growth in 2020, despite growth among the majority in 2019.



*Top ranked occupations by total job postings in the NOVA region remain relatively unchanged in 2020 from 2019; a few prominent professional/government services employers jumped to higher rankings; and software development skills became more prominent.*

2020 Rank	2019 Chg.	Occupation	2020 Postings	2019 Chg.	Employers	2020 Postings	2019 Chg.	Specialized Skills	2020 Postings
1	-	Software Developers, Applications	37,081	-	General Dynamics	8,203	↑ (2)	Scheduling	58,968
2	-	Managers, All Other	16,535	↑ (3)	Leidos	6,979	(1) ↓	Microsoft Excel	57,835
3	-	Computer Systems Engineers/Architects	15,818	↑ (5)	CACI	6,584	-	Project Management	46,187
4	-	Information Security Analysts	13,216	(2) ↓	Booz Allen Hamilton Inc.	5,686	-	Budgeting	41,186
5	↑ (8)	Management Analysts	11,574	↑ (10)	Inova Health System	5,214	↑ (6)	Software Development	35,897
6	(5) ↓	Retail Salespersons	9,548	↑ (12)	Amazon	4,714	(5) ↓	Sales	35,023
7	(6) ↓	Sales Representatives, Wholesale and Manufacturing	8,956	-	SAIC	4,281	↑ (8)	Java	32,660
8	(7) ↓	Registered Nurses	8,544	-	Deloitte	3,948	(7) ↓	Microsoft PowerPoint	31,765
9	-	Network and Computer Systems Administrators	7,989	-	Northrop Grumman	3,884	↑ (11)	Python	30,790
10	-	Computer Systems Analysts	6,879	↑ (11)	Perspecta	3,094	(9) ↓	SQL	30,560

Source: Burning Glass Technologies, Labor Insight, *Specialized Skills Job Postings Report*, January 19, 2021, <https://www.burning-glass.com/products/labor-insight>.

As might be expected, when ranking individual occupations by the total number of postings for each in the NOVA region during 2020 jobs related to retail and sales fell in the rankings from 2019, while nearly all others (largely in information technology) remained in the same position. Similarly, top employers in the region that moved up in the rankings from 2019 were primarily those involved in technology or government services. Amazon jumped six places, likely owing to their strong business position throughout the pandemic, as well as their continued expansion through HQ2 (projected to employ 1,600 at this point) and their Amazon Web Services headquarters near Dulles International Airport.<sup>5</sup>

Inova Health also rose five places, despite registered nurses falling a place in terms of top-ranked occupations. Instead, Inova and other health systems may have been posting more frequently for other healthcare support occupations, or through entities outside of the region

<sup>5</sup> Jonathan Capriel, "Amazon now a top 10 employer in three N. Va. counties—for three different reasons," *Washington Business Journal*, December 8, 2020, <https://www.bizjournals.com/washington/news/2020/12/08/amazon-growing-jobs-across-northern-virginia.html>.

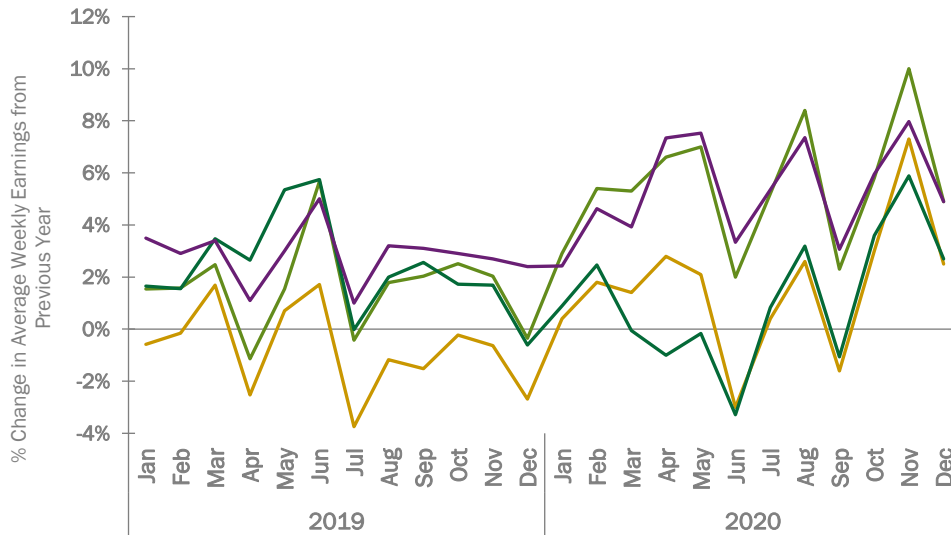


such as travel nursing agencies, which have been relied on heavily in response to COVID-19.<sup>6</sup> Finally, software development skills and languages were the primary technical skills that gained in ranking over 2019, while more basic software skills (i.e. PowerPoint and Excel) fell, as did sales skills generally. “Scheduling” became the most requested skill in regional job postings for 2020, which may be a result of the greater work flexibility and coordination required due to increased turnover, uncertainty, and remote work.

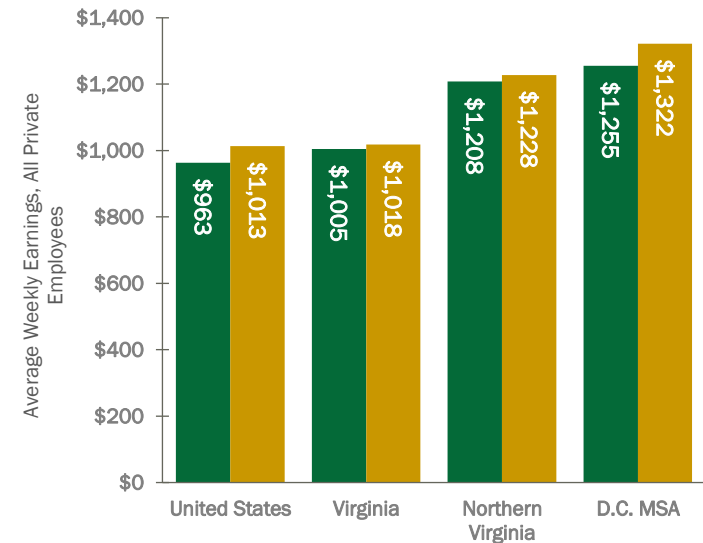
## Earnings

Over-the-year earnings growth remained lower in Virginia, and Northern Virginia specifically, compared to the entire D.C. MSA or the rest of the country during 2020. Yet, despite dips in June and September (and aside from Virginia) earnings growth was generally higher in 2020 than across much of 2019. This growth in earnings is likely due to larger employment declines in low-earning sectors and occupations such as food service and hospitality, which skews the average towards the higher earning jobs that remained.

*Over-the-year growth in average weekly earnings for all private employees in Northern Virginia and Virginia was lower than in the D.C. MSA and across the entire United States over the course of 2020.*



*Average weekly earnings in the NOVA region are only slightly below those of the D.C. MSA, although growth between 2019 and 2020 was not as substantial*



Source: U.S. Bureau of Labor Statistics (BLS), *Current Employment Survey (National)*, January 8, 2021, <https://www.bls.gov/ces/>. || U.S. BLS, *State and Metro Area Employment, Hours, & Earnings*, February 3, 2021, <https://www.bls.gov/sae/>.

NOTE: Due to data restrictions, “Northern Virginia” includes the nine jurisdictions previously defined as part of the “NOVA region” in addition to Clarke, Culpeper, Fauquier, Rappahannock, Spotsylvania, Stafford, and Warren counties, as well as Fredericksburg City, Virginia. Over-the-year change based on earnings in nominal dollars for all private sector employees.

<sup>6</sup> Erika Beras, “As the pandemic continues, demand for travel nurses is up. Pay keeps rising, too,” *Marketplace*, January 4, 2021, <https://www.marketplace.org/2021/01/04/as-the-pandemic-continues-demand-for-travel-nurses-is-up-pay-keeps-rising-too/>.

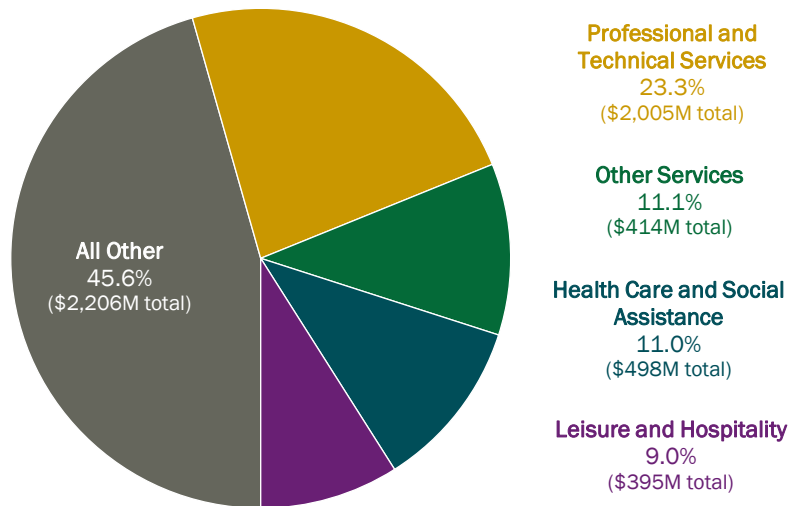


## Small Businesses and the COVID Response

A key factor in how 2020's economic turmoil will impact the economy long-term will be the extent and effectiveness of fiscal stimulus enacted by federal, state, and local governments in response to COVID-19. Financial assistance is particularly important for small businesses, which have been hit hardest by quarantine and social distancing measures. By the end of 2020, small business revenue in the NOVA region was down anywhere between 20-40% depending on locality, and between a quarter and a third of small businesses were closed (although not necessarily permanently), compared to the start of the year.<sup>7</sup>

The Paycheck Protection Program (PPP), which funded forgivable loans to small businesses and non-profits to cover payroll and some overhead costs, has been a cornerstone of the federal fiscal response. In the first two rounds of PPP funding, over 40,000 loans were approved for small businesses in the NOVA region, totaling over \$5.5 billion. The average loan amount for businesses in the region was around \$135,000, which was higher than the average amount nationwide (approx. \$101,000). Businesses in the professional services sector received the largest share of the loans, both in number and amount, while those hit hardest by employment losses in leisure and hospitality received around 9%, totaling \$395 million.

*Service-providing industry sectors received the largest shares of PPP loans in the NOVA region in 2020*



Source: Small Business Administration, Paycheck Protection Program Data, December 1, 2020, <https://www.sba.gov/funding-programs/loans/coronavirus-relief-options/paycheck-protection-program/ppp-data>.

*Economic development agencies in the NOVA region provided at least \$73 million in additional business assistance funds in 2020*

Jurisdiction	Program	Amount	Businesses Assisted
Alexandria City	Back to Business Grant	\$5.9 million	554
	Winterization funds	\$500,000	94
Arlington County	Giving Resiliency Assets Near Term (GRANT)	\$2.8 million	393
Fairfax County	Rise Grants	\$52.5 million	4,800
Loudoun County	Business Interruption Fund	\$6.4 million	1,398
Manassas City	Small business grants	\$350,000	140
Prince William County	Small Business Relief Program	\$ 5 million	500

Source: NOVA analysis of media articles and public websites

<sup>7</sup> Based on small business data provided by Womply and aggregated by the Opportunity Insights Economic Tracker (<https://tracktherecovery.org/>). Data is seasonally adjusted and indexed to the 1/4/2020-1/31/2020 period.



In addition to \$100 million in grants awarded to 2,500 businesses through the state’s Rebuild VA initiative, local jurisdictions also funded an array of other business assistance initiatives in 2020. On top of distributing funding provided through the CARES Act, these programs drew on local funds to provide millions of additional dollars to thousands of businesses in the region.

## Looking Forward

All told, the NOVA region—and the Washington D.C. MSA more broadly—fared better over the course of 2020 than many other metropolitan areas across the country, particularly in terms of labor market outcomes. Overall employment losses caused by the pandemic were more moderate due both to COVID-19’s lower cumulative impact and the region’s highly professionalized and technology/government-oriented workforce. As a result, the region is relatively well-positioned for economic and labor market improvements in 2021, a fact that is reflected in recent measures of business and household sentiment.

Moving from the end of 2020 into the beginning of 2021, overall small business sentiment in the D.C. MSA has been on par with national levels and consistently more optimistic than other large metropolitan areas such as New York City (NYC), Los Angeles (LA), Dallas, or Chicago.<sup>8</sup> Similarly, as of the start of January, the D.C. MSA ranked last out of the top 15 most populated metropolitan areas for the percentage of households anticipating a loss of employment income in the next month (21.4% compared to 44.4% in LA or 32.8% in NYC).<sup>9</sup>

Of course, key to any economic growth or recovery in 2021 and beyond will be the ongoing deployment and success of a COVID-19 vaccine. In this regard, the region is also better positioned: while the D.C. MSA ranked seventh out of the top 15 metropolitan areas in terms of the percentage of adults reporting having already been vaccinated (as of early January), it ranked fourth for the percentage of adults reporting they “definitely will” receive a vaccine when available (64.8% versus 56.3% in LA, 55.1% in NYC, and 50.9% nationally).

It is also important to keep in mind that this analysis primarily looks at the region overall, and that economic outcomes, particularly following the pandemic, vary significantly based on race/ethnicity and income. Demographic data for the indicators provided above are typically more delayed or unavailable at the local level. However, we do know that at the national level, low income Americans as well as Black and Hispanic Americans (regardless of occupation or income) have experienced more adverse economic impacts due to the pandemic than white and middle- or upper-income Americans.<sup>10</sup> We must not lose sight of these individuals and work to facilitate their reemployment and access to high-quality jobs as the region recovers.

Continuing to provide access to affordable and easily accessible education and training is one important way of doing so. Of the respondents to a national survey who indicated a plan to enroll in additional education or training over the next year to make up for a lost job or diminished hours/wages due to COVID, around half planned to enroll in individual courses or a certificate/licensing program,

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<sup>8</sup> United States (U.S.) Census Bureau. *Small Business Pulse Survey*, January 14, 2021, <https://www.census.gov/data/experimental-data-products/small-business-pulse-survey.html>

<sup>9</sup> U.S. Census Bureau, *Household Pulse Survey*, January 26, 2021, <https://www.census.gov/programs-surveys/household-pulse-survey.html>.

<sup>10</sup> Kate Bahn and Carmen Sanchez Cumming, “The coronavirus recession continues to threaten low-wage U.S. workers due to stalled jobs recovery,” *Washington Center for Equitable Growth*, December 4, 2020, <https://equitablegrowth.org/the-coronavirus-recession-continues-to-threaten-low-wage-u-s-workers-due-to-stalled-jobs-recovery/>.





compared with just a quarter planning to enroll in either bachelor's or graduate degree programs. However, survey respondents also saw the cost of tuition, books, and other expenses as the most significant potential impediment to obtaining this education, with 45% responding that these costs would make their pursuit of further education "extremely" or "very" challenging.<sup>11</sup>

Recognizing this barrier to education, and as the region's primary provider of affordable, career-oriented training and education, NOVA funded and partnered in many programs aimed at providing financial assistance to those in need throughout 2020. These include:

- **\$9.4 million** in Emergency Financial Aid Grants distributed to students adversely impacted by COVID-19 to pay for housing, grocery, technology, childcare, or healthcare expenses;
- **\$5.8 million** from the state's Re-employing Virginians' (REV) initiative, which provides tuition vouchers to individuals registering in a qualifying workforce or non-credit training program (\$3,000 for full-time, \$1,500 for part-time);
- **\$1.9 million** funded through the Cities of Manassas and Manassas Park, Prince William County, and Virginia Career Works to provide residents with no-cost training in areas such as information technology, healthcare, and English-language skills (ESL);
- **\$1,000 grants** through the VA Ready initiative to students that successfully obtain a credential in information technology, healthcare, or certain trades programs; and,
- **Tuition-free** dual-enrollment courses for 2,966 high school students as part of the JumpStart program.

Whatever 2021 holds, these kinds of continued investments in workers and families, particularly targeted at those areas and industries most heavily impacted by job losses due to the pandemic, will be essential for the NOVA region to maintain a healthy and vital economic recovery.

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Visit our website to find more data on labor market trends and occupations in the Northern Virginia region:

[www.nvcc.edu/lmi](http://www.nvcc.edu/lmi)

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<sup>11</sup> Strada Center of Education Consumer Insights, *Confidence in Education's Promise: Perspectives on Access and Barriers to Good Jobs*, November 12, 2020, <https://cci.stradaeducation.org/pv-release-november-12-2020/>

