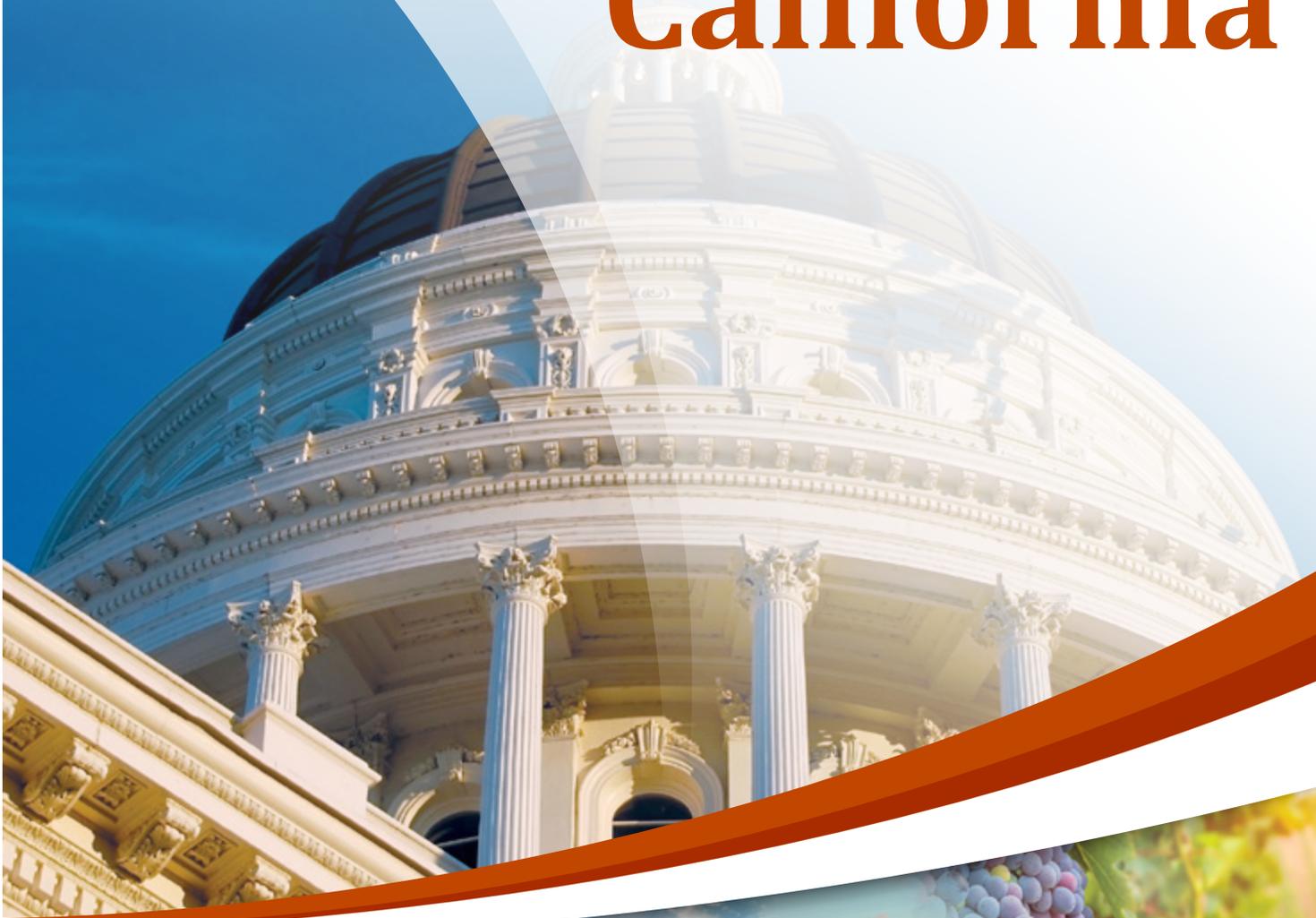


# *A Labor Day Briefing for* **California**



September 2021



**State of California  
Labor and Workforce Development Agency  
Employment Development Department  
Labor Market Information Division**

This briefing highlights California's labor markets as the nation commemorates Labor Day on September 6, 2021.

The report presents significant labor market trends and current statistics relating to the California economy.

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## Acknowledgements

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## Executive Summary

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### **The COVID-19 pandemic disrupted California's labor market and it is now recovering.**

- California's unemployment rate shot up from its near-record low of 4.3 percent in February 2020 to 16.0 percent in April 2020, shattering the previous record high of 12.6 percent at the height of the Great Recession in 2010.
- Strong economic stimulus and other social safety nets<sup>1</sup> cushioned workers and businesses during the pandemic and correlated with a rapid economic turnaround.
- California gained an average of 105,500 nonfarm jobs per month from April 2020 through July 2021—a level of job growth not seen previously in the official data series that began in 1990.
- California added 114,400 nonfarm jobs in July 2021, boosting total nonfarm employment in the state to 16,529,000 jobs. This was the state's 13<sup>th</sup> job increase in the 15 months following the April 2020 low.

### **Unemployment in California has fallen steeply over the course of the recovery and continues to trend downward, while jobs have seen robust growth.**

- California's seasonally adjusted unemployment rate was 7.6 percent in July 2021—down 8.4 percentage points than peak unemployment of 16.0 percent in April 2020.
- Unemployment fell in 14 out of the 15 months following the April 2020 peak. California has experienced robust job growth over the course of its ongoing recovery.
- As of July 2021, California had recovered 58.3 percent of the 2,714,800 nonfarm jobs it lost in the months of March and April 2020 combined.
- The state's leisure and hospitality sector added 558,500 jobs from April to July 2021, making it one of the faster growing sectors in California's economy right now.
- The EDD projects a statewide total employment increase of nearly 1.9 million jobs between the second quarter of 2020 and the second quarter of 2022. With the five fastest growing industry sectors projected to grow between 11.1 and 34.3 percent. Sixty-three percent of the nonfarm job growth is projected to occur in leisure and hospitality; trade, transportation, and utilities; and professional and business services.
- The occupations with the most projected job openings include registered nurses; heavy and tractor-trailer truck drivers; retail salespersons; waiters and waitresses; farmworkers and laborers, crop, nursery, and greenhouse; medical assistants; dental assistants; laborers and freight, stock, and material movers, hand; and accountants and auditors. Please see Figure 9 for the complete list of occupations with the most projected job openings by education level.

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<sup>1</sup> The pandemic response included enhanced unemployment insurance benefits, new pandemic unemployment assistance for self-employed workers, student loan forbearance, loans to small businesses and nonprofits, rental eviction protections, mortgage relief, utility assistance, child tax credits, and an expansion of the Supplemental Nutrition Assistance Program.

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# California's Labor Market Is Rebounding From the Pandemic-Induced Recession

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As the nation commemorates Labor Day in 2021, California's labor market is rebounding from the pandemic-induced recession of February through April 2020 and is on the road to full recovery. Unemployment has fallen substantially throughout the state and the economy is adding jobs at a robust pace. Even as labor market conditions improve, the aftereffects of the recession still linger, and the COVID-19 pandemic continues to pose an ever-present threat to the public's health and safety.

## THE PANDEMIC'S EFFECT ON CALIFORNIA'S LABOR MARKET

**The COVID-19 pandemic disrupted California's labor market and it is now recovering.**

- In February 2020, California's labor market was operating at full employment, and the state's longest employment expansion in seven decades of record-keeping turned 120 months (10 years) old. California's unemployment rate stood at 4.3 percent in February 2020, having inched up from its record low of 4.1 percent in April through November 2019. The state's job gains from February 2010 through February 2020 totaled 3,473,700 nonfarm jobs.
- The COVID-19 pandemic forced California, the nation, and much of the world, to adopt public health mitigation measures that shut down all but essential services and activities. These actions brought California's 10-year employment expansion to a halt. Over just a two-month period, from February 2020 through April 2020, the economy lost 2.7 million jobs. California's unemployment rate shot up from its near-record low of 4.3 percent in February 2020 to 16.0 percent in April 2020, shattering the previous record-high of 12.6 percent that occurred at the height of the Great Recession in January-March 2010.
- In response, state and federal governments launched unprecedented investments in social safety nets and strong economic stimulus totaling several trillions of dollars. This assistance included, but was not limited to: enhanced unemployment benefits, new pandemic unemployment assistance for self-employed workers, child tax credits, the Paycheck Protection Program, student loan forbearance, mortgage relief, protection against evictions for renters, utility protections, and an expansion of the Supplemental Nutrition Assistance Program.
- April 2020 was the low point of the pandemic-induced recession, and the labor market has been recovering and expanding ever since.<sup>2</sup> California began a county-by-county program of tightening or easing public health restrictions based on data-driven criteria linked to the prevalence of the COVID-19 virus itself. The state lifted all remaining public health restrictions and fully reopened its economy on June 15, 2021.

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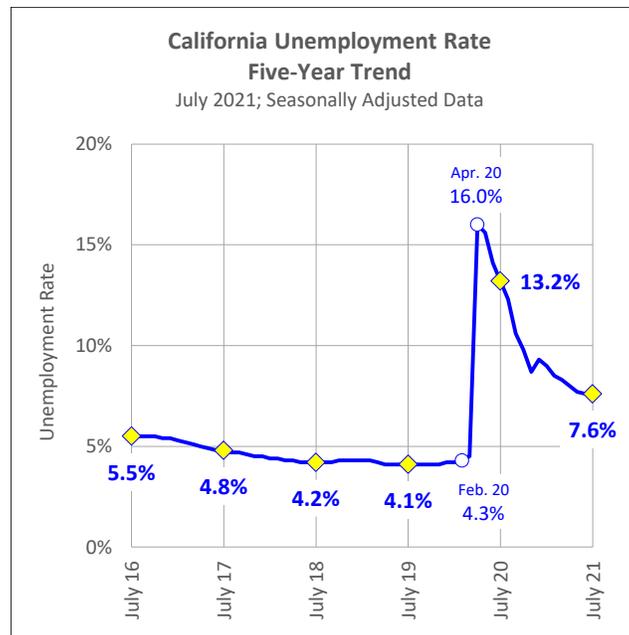
<sup>2</sup> U.S. business cycles—economic recessions and expansions—are officially arbitrated and dated at the federal level, but not at the state level. The EDD dates California's business cycles according to peaks and troughs in total nonfarm employment, or jobs. The jobs data show that a clear employment peak occurred in February 2020 and a clear trough occurred in April 2020. As such, February 2020 marks the beginning of the recession and April 2020 marks its end and the beginning of the ongoing expansion.

## UNEMPLOYMENT

### Unemployment in California has fallen steeply over the course of the recovery

- California's unemployment rate has trended rapidly downward over the course of the recovery-to-date. California's seasonally adjusted unemployment rate was 7.6 percent in July 2021. This was 8.4 percentage points lower than its pandemic peak of 16.0 percent in April 2020.

**Figure 1: Unemployment Fell in 14 Out of the 15 Months Since April 2020 Peak**



**Source:** Employment Development Department

- Unemployment fell in 14 out of the 15 months following its peak in April 2020<sup>3</sup>, decreasing by a total of 1,532,000 persons over the entire period. Despite this improvement, there were 589,000 more unemployed Californians in July 2021 than there were before the pandemic in February 2020, when 845,000 persons were unemployed.

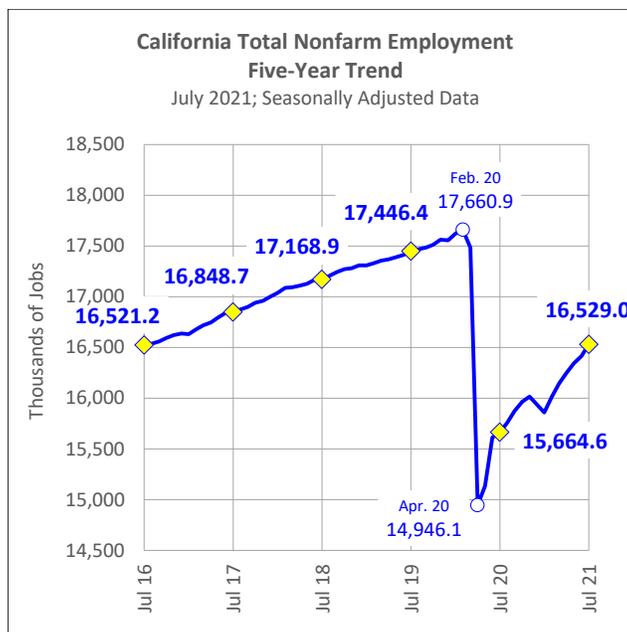
<sup>3</sup> The lone exception was a 128,000-person increase in December 2020 when stricter public health restrictions against the pandemic were temporarily in effect.

## TOTAL NONFARM EMPLOYMENT (SEASONALLY ADJUSTED JOBS)

California has experienced robust job growth over the course of its ongoing recovery.

- California added 114,400 nonfarm jobs in July 2021, boosting total nonfarm employment in the state to 16,529,000 jobs. This was the state's 13<sup>th</sup> job increase in the 15 months following the April 2020 low.<sup>4</sup>

**Figure 2: Nearly Sixty Percent of Lost Nonfarm Jobs Now Recovered**



**Source:** Employment Development Department

- California added 1,582,900 nonfarm jobs from April 2020 through July 2021, which was an increase of 10.6 percent. As of July 2021, California had recovered 58.3 percent of the 2,714,800 nonfarm jobs it lost in the months of March and April 2020 combined.
- California's jobs data underscore how strong the state's rebound from the pandemic-induced recession has been to date, as evidenced by the following comparisons:
  - Until the pandemic, the 98,500-job gain in April 2016 was the largest single month of growth since 1990. The 114,400-job gain in July 2021 was the state's fourth gain of over 100,000 jobs in six months and its seventh over the course of the 15-month recovery.
  - California gained an average of 105,500 nonfarm jobs per month from April 2020 through July 2021. This average monthly gain over the entire 15-month recovery exceeded the state's largest monthly job gain in the official data series that dates to the beginning of 1990.

<sup>4</sup> The two exceptions were losses of 75,400 and 80,000 nonfarm jobs in December 2020 and January 2021 respectively, when stricter public health restrictions against the pandemic were in effect.

- California's 10.6 percent job increase from April 2020 through July 2021 equates to an annualized job growth rate of 8.5 percent per year. This was more than double the state's largest year-over job gain on record prior to the pandemic (a 4.0 percent increase in November 1998) and three-and-a-half times greater than the 2.4 percent per year average pace of job growth during the February 2010-February 2020 expansion.

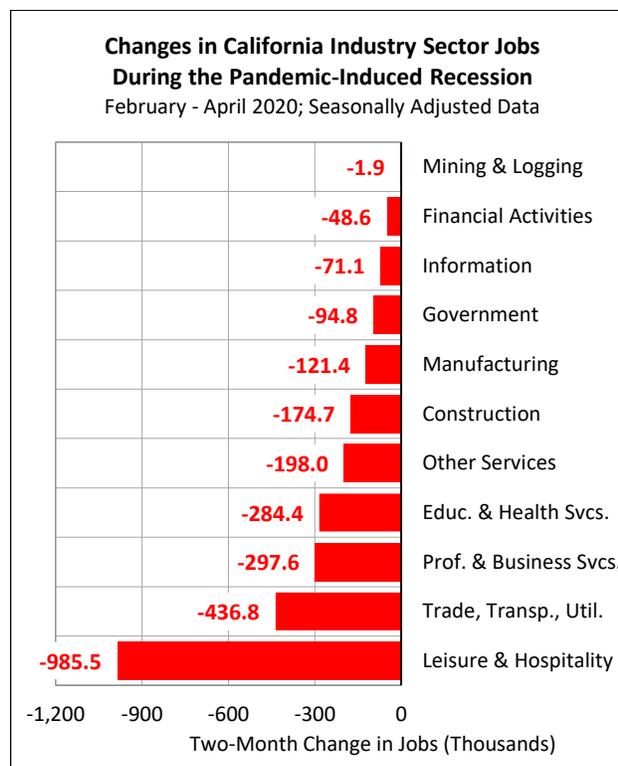
## INDUSTRY SECTOR TRENDS (SEASONALLY ADJUSTED DATA)

California's job gains during the recovery have been broad-based across most industry sectors, but they have yet to fully recover from the recession.

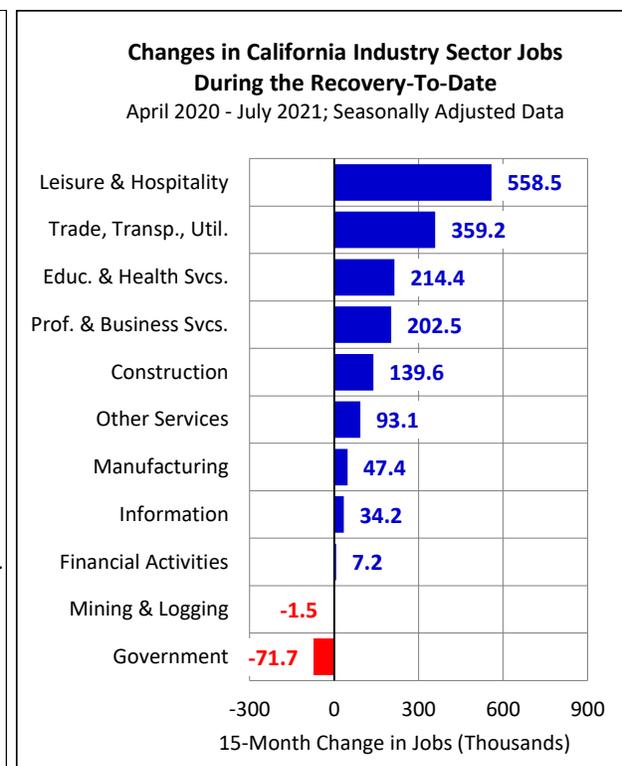
### PANDEMIC JOB LOSSES

- California's job losses during the pandemic-induced recession were distributed across all industry sectors, but concentrated in those sectors in which people congregate or interact in close proximity to others. The state's travel and tourism industry was particularly hard-hit by the pandemic.

**Figure 3: Hardest Hit Sectors**



**Figure 4: Strongest Recoveries**



**Source:** Employment Development Department

- The leisure and hospitality sector, which includes accommodation, arts and entertainment, and food service establishments, alone lost 985,500 jobs, or nearly half (47.9 percent) of all jobs in the sector, from February 2020 through April 2020. The other services sector lost 198,000 jobs, or one-third (33.4 percent) of all jobs in the sector. These losses were concentrated in personal care services establishments such as barber and beauty shops.

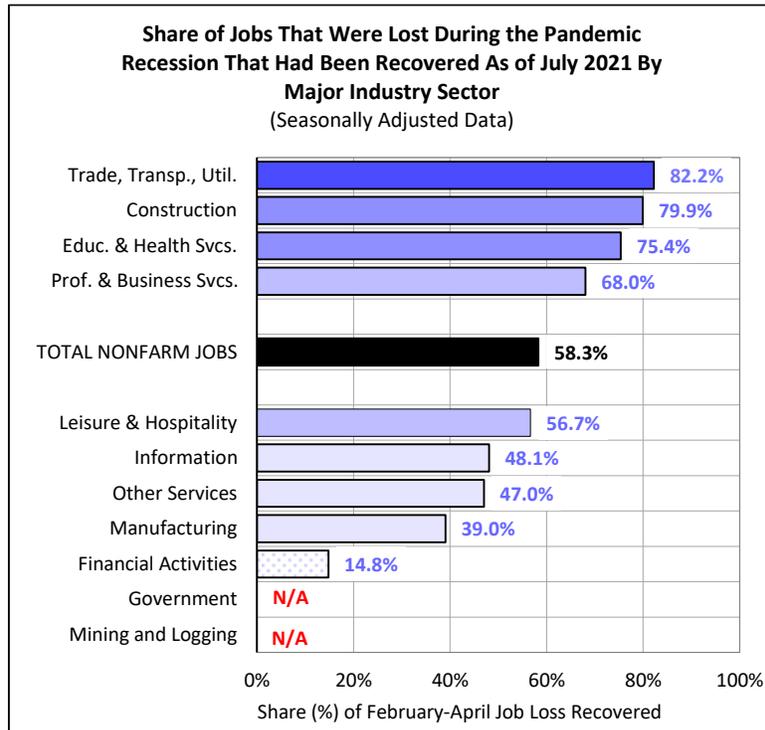
Construction (174,700 jobs; 19.1 percent) also experienced a larger percentage job loss than the 15.4 percent loss in the economy as a whole. Three additional California industry sectors experienced a job loss of more than 10.0 percent during the recession: trade, transportation, and utilities (436,800 jobs; 14.2 percent); information (71,100 jobs; 12.2 percent); and professional and business services (297,600 jobs; 10.7 percent).

- California's five remaining industry sectors also suffered job losses during the recession, but lost less than 10.0 percent of their jobs: educational and health services (284,400 jobs; 9.9 percent); manufacturing (121,400 jobs; 9.1 percent); mining and logging (1,900 jobs; 8.5 percent); financial activities (48,600; 5.7 percent); and government (94,800; 3.6 percent).

## **THE RECOVERY**

- The state's leisure and hospitality sector experienced the largest job gain during the April 2020-July 2021 recovery, adding 558,500 jobs. This was a 52.1 percent increase from its April 2020 low. Two-thirds of this net gain occurred over the six-month period ending in July 2021, signaling that job growth in the sector has accelerated in recent months.
- The other services sector, also disproportionately hard-hit by the pandemic, added 93,100 jobs during the recovery. Its 23.6 percent job increase from April 2020 through July 2021 was more than double the overall economy's 10.6 percent increase over the same period.
- Two additional California industry sectors grew at a faster rate than the overall economy: construction (139,600 jobs; 18.9 percent) and trade, transportation, and utilities (359,200 jobs; 13.7 percent).
- The educational and health services (214,400 jobs; 8.3 percent) and professional and business services (202,500 jobs; 8.2 percent) sectors each added over 200,000 jobs from April 2020 through July 2021, but grew at a slower rate than the overall economy. Manufacturing (47,400 jobs; 3.9 percent), information (34,200; 6.7 percent), and financial activities (7,200; 0.9 percent) also added jobs over the course of the recovery, but at a slower rate than the overall economy.
- Government (71,700 jobs; 2.8 percent) and mining and logging sector (1,500 jobs; 7.4 percent) lost jobs from April 2020 through July 2021, even as other sectors recovered. The losses in mining and logging, which includes establishments involved in oil extraction and production, in large part reflected turbulence in global oil markets since the beginning of the pandemic. Government's job losses in part reflected the effects of school and university campus closures during the pandemic.
- The trade, transportation, and utilities sector had recovered more than four-fifths (82.2 percent) of its job losses as of July 2021. Its transportation, warehousing, and utilities subsector had more than recovered its recessionary job losses, reflecting strength in California's international trade and logistics industry and a steep rise in online consumer spending during the pandemic.

**Figure 5: Multiple Sectors Recovering Job Losses**



**Source:** Employment Development Department

- Construction (79.9 percent) and educational and health services (75.4 percent) had recovered at least three-quarters of their job losses, and professional and business services (68.0 percent) had recovered more than two-thirds. Leisure and hospitality (56.7 percent) was the only other sector to have recovered more than half of its jobs losses.

## REGIONAL TRENDS (NOT SEASONALLY ADJUSTED DATA)

### Labor market conditions are improving in all California regions.

- The Employment Development Department (EDD) subdivides California into 15 regions for the purposes of regional economic analysis, which are delineated in the regional unemployment rate map below (Figure 6). These regional definitions are the same as those used by the state workforce development system in strategic planning.<sup>5</sup>
- California's regions vary greatly in size. Los Angeles Basin, with nearly 4.2 million jobs in July 2021, was the state's largest region, followed by Bay-Peninsula with nearly 2.2 million. Six additional regions had more than one million jobs, and one had more than 500,000. At the opposite end of the size spectrum, four regions had between 200,000 and 300,000 jobs, and two (Middle Sierra and North Coast County) had less than 50,000 jobs.

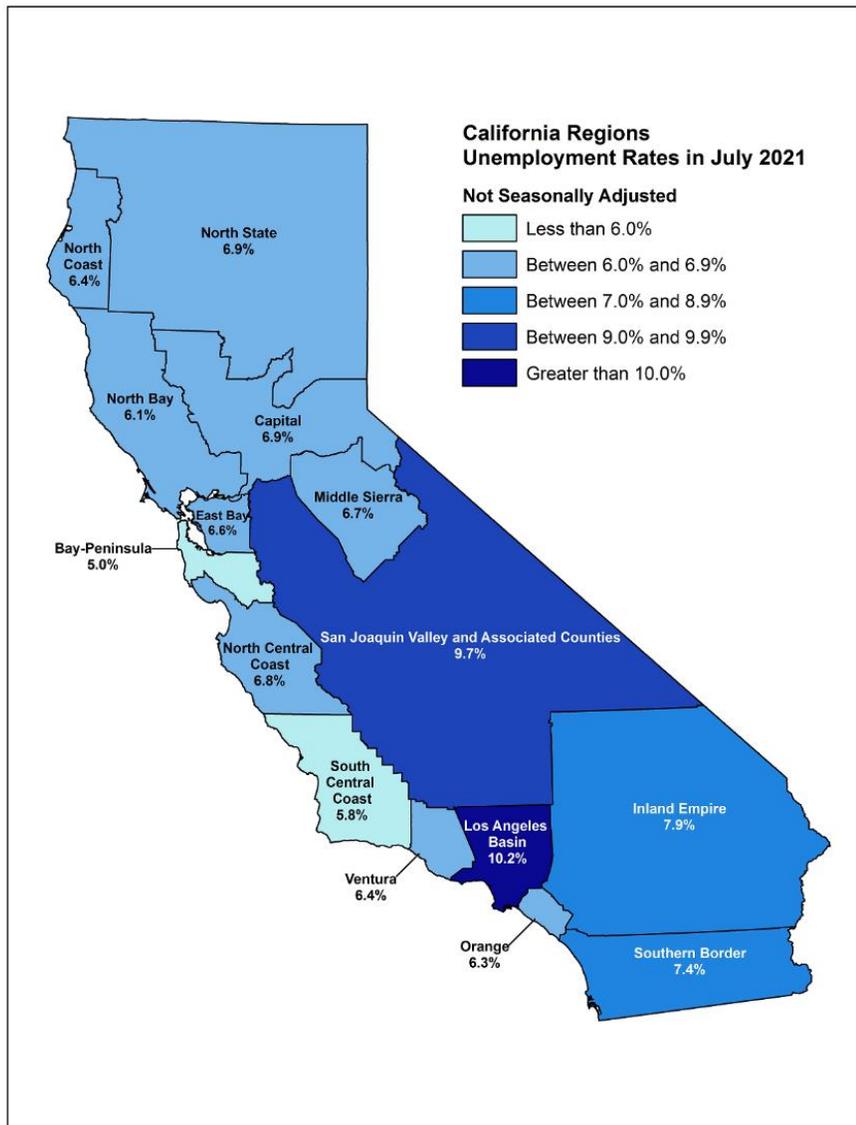
<sup>5</sup> Although San Benito County is part of North Central Coast Region, it is included in Bay-Peninsula Region for the purposes of this report because its monthly jobs are estimated as part of Bay-Peninsula's San Jose-Sunnyvale-Santa Clara Metropolitan Statistical Area.

- Any analysis of regional unemployment and employment trends is complicated by the fact that the regional data are not seasonally adjusted. The only method to filter out regular and recurring seasonal patterns of employment and unemployment from not seasonally adjusted data is to compare like months of the calendar year. As such, this analysis of regional trends relies on year-over comparisons for the month of July. Comparisons between different months of the calendar require seasonally adjusted data.

### **Unemployment is falling across regions.**

- In July 2020, when the recovery was still in its infancy, a total of 13 regions had unemployment of more than 10.0 percent. Los Angeles Basin (18.2 percent) had the highest rate among regions, followed by San Joaquin Valley (13.8 percent) and Southern Border (13.0 percent). South Central Coast (9.7 percent) and Bay-Peninsula (9.8 percent) were the only regions that had unemployment rates less than 10.0 percent.
- In contrast, unemployment has fallen in every region of the state over the last year. Los Angeles Basin (8.0 percentage points) had the largest year-over unemployment rate decrease in July 2021, followed by Orange (6.0 percentage points). A total of five regions experienced year-over rate decreases of 5.0 percentage points or more and seven additional regions had decreases of more than 4.0 percentage points. North State (3.4 percentage points) had the smallest year-over rate decrease among regions.

**Figure 6: Regional Unemployment Rates**



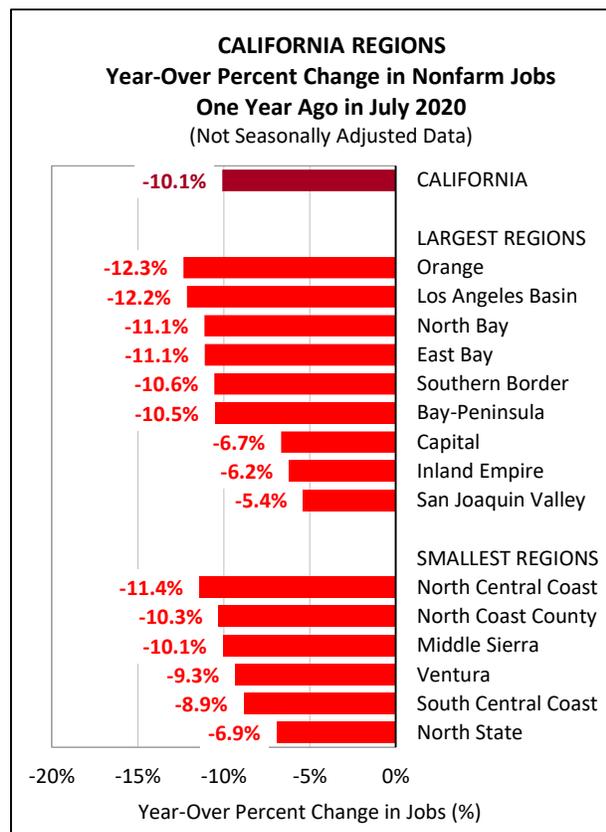
Source: Employment Development Department

**Every region of California had strong year-over job gains in July 2021.**

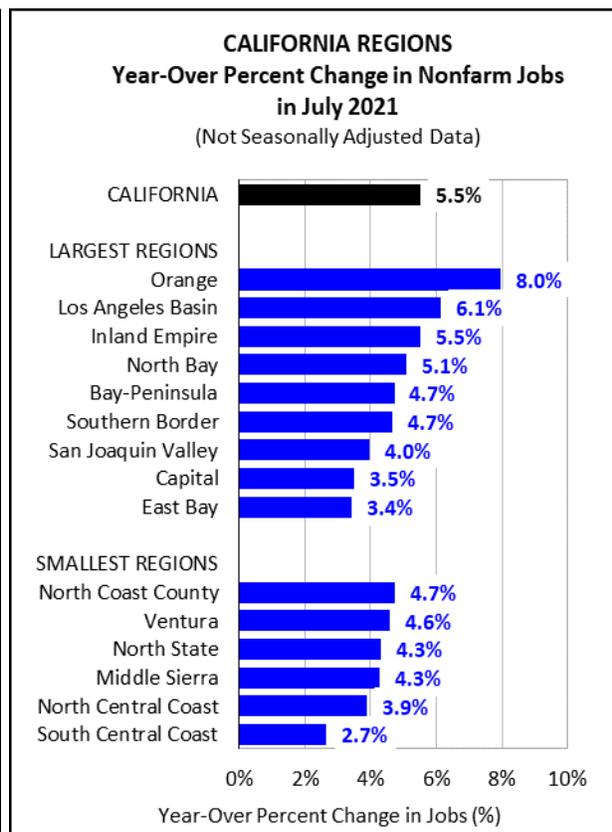
- In July 2020, all 15 California regions had substantial year-over job losses as a result of the pandemic. The magnitude of year-over job losses tended to align with a region’s size. Los Angeles Basin (547,100) had the largest year-over job loss among regions, followed by Bay-Peninsula (245,500) and Orange (205,800). Two additional regions had year-over losses of more than 125,000 jobs: Southern Border (163,400) and East Bay (131,100). Each of the state’s four remaining largest regions had year-over losses of over 65,000 jobs. Year-over losses in the state’s six smallest regions ranged from a high of 29,000 jobs in Ventura to a low of 4,700 jobs in Middle Sierra.

- Nine California regions had year-over job losses of more than 10.0 percent in July 2020, the largest of which were in Orange (12.3 percent) and Los Angeles Basin (12.2 percent). San Joaquin Valley (5.4 percent) had the smallest year-over job loss in percent among regions.
- The regional jobs situation has improved dramatically over the last year. In July 2021, every one of California's 15 regions showed a year-over job gain. Los Angeles Basin (242,800) had the largest year-over gain among regions, followed by Orange (116,400) and Bay-Peninsula (98,600). Three additional regions had year-over gains of more than 50,000 jobs, and three had gains of more than 25,000 jobs. Year-over gains in the state's smallest regions ranged from a high of 12,900 in Ventura to a low of 1,800 jobs in Middle Sierra.

**Figure 7: Job Losses During Pandemic**



**Figure 8: Job Growth During Recovery**



**Source:** Employment Development Department

- In percentage terms, year-over job growth ranged from highs of 8.0 percent and 6.1 percent in Orange and Los Angeles Basin, respectively, to a low of 2.7 percent in South Central Coast in July 2021. All told, four California regions grew at a year-over pace of more than 5.0 percent. Seven additional regions grew at a year-over pace of 4.0 percent or more.

## CONCLUSION

As severe as this pandemic-induced recession was, it was short-lived. The labor market bottomed out in April 2020 and began to expand and recover thereafter as public health restrictions were eased. California's recovery, which turned 15 months old in July 2021, has

featured rapidly falling unemployment and robust job growth. All of California's regions and most of its industry sectors were recovering as of July 2021, but the recovery process was still ongoing.

California's labor market and economy have displayed remarkable resiliency over the course of the pandemic-to-date. In particular, the labor market has demonstrated a clear capacity to bounce back from pandemic-induced recession, and do so quickly. The California Department of Finance's May 2021 Budget Revision economic forecast and UCLA Anderson Forecast's June 2021 economic forecast both anticipated that, barring unforeseen shocks to the economy or developments with the COVID-19 pandemic, the robust jobs recovery will continue through 2021 and into 2022, with job growth rates returning to more normal historical levels. These forecasts assumed that the COVID-19 pandemic will have a diminished impact on the labor market, in large part because an ever-increasing share of the eligible population becoming fully vaccinated will limit its spread.

## California Short-Term Industry and Occupational Employment Projections

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The base period of 2020 second quarter reflects the large employment drops of the pandemic-induced recession. As a result, growth rates may appear to be unusually large in recovering industries. Assumptions about the economic impact of COVID-19 are built into the projections process.

The EDD produces employment projections that provide an estimate of the changes in industry and occupational employment over time that result from past industry trends, technological change, and other factors. Statewide short-term (two-year) projections are revised annually. The following is a recap of the most recently published short-term employment projections.

### Industry Employment Projections 2020 2nd Quarter - 2022 2nd Quarter

The EDD projects a statewide total employment increase of 1,879,000 jobs by the second quarter of 2022. The top five fastest growing industry sectors are projected to grow between 11.1 and 34.3 percent. Sixty-three percent of the total projected nonfarm job growth is in three industry sectors: leisure and hospitality; trade, transportation, and utilities; and professional and business services.

- The largest number of new jobs is expected in the leisure and hospitality industry sector, resulting in a gain of 416,900 jobs and a growth rate of 34.3 percent. Within this industry sector, the food services and drinking places subsector is projected to post the largest gains with 315,200 jobs.
- The trade, transportation, and utilities industry sector is projected to gain 376,100 jobs with a growth rate of 14.0 percent. Recording the biggest gains will be the clothing and clothing accessories stores subsector which is projected to add 67,100 jobs.
- The professional and business services industry sector is expected to add 277,400 jobs with a growth rate of 11.1 percent. Forty-nine percent of the industry's job growth is projected to be in the professional, scientific, and technical services subsector, a gain of 135,500 jobs.

## Occupational Employment Projections 2020 2nd Quarter - 2022 2nd Quarter

California's total employment is projected to increase by 11.2 percent (1,879,000 jobs) between the second quarter of 2020 and the second quarter of 2022, reaching nearly 18.6 million jobs. The occupational groups with the most growth forecasted are food preparation and serving related (320,900); sales and related (220,000); and office and administrative support (182,800).

In addition to job growth, workers will be needed to replace those who have exited the labor force or who have transferred to a different occupation. California is expected to generate a combined total of nearly six million job openings, with exits and transfers comprising 68 percent of this total.

The top 10 occupations with the most job openings are expected to generate nearly 1.5 million total job openings, accounting for 26 percent of all openings in California. Nine of the top 10 occupations have more openings due to transfers than exits. Transfers are the projected number of workers leaving an occupation and transferring to a different occupation. Exits are the projected number of workers leaving an occupation and exiting the labor force entirely.

The top 10 fastest growing occupations are expected to add jobs at a rate of 35.6 percent or higher, compared to the expected overall 11.2 percent growth rate for California. Personal care and service occupations make up 3 of the top 10 occupations on the list.

The [2020-2022 California industry and occupational employment projections](#) are available online.

## California Jobs in Demand

The following table lists examples of occupations utilized by various industries where job demand is expected to grow. Occupations were selected based on jobs with the most projected job openings (California short-term occupational projections 2020-2022), annual earnings, and online job advertisements. Occupations are separated into three categories based on educational level; some require a high school diploma or less, while others require two to four years of college or higher. The online job advertisements were extracted from Burning Glass Technologies Labor Insight™ data series, which compiles, analyzes, and categorizes job advertisements from numerous online job boards, including [CalJOBS<sup>SM</sup>](#), California's labor exchange system.

**Figure 9: Top 5 Projected Job Openings by Education Level**

Occupation	Projected 2020-2022 Job Openings <sup>1</sup>	2021 Median Annual Wage <sup>2</sup>	Job Ads in Last 60 Days ending August 17, 2021 <sup>3</sup>
<b>REQUIRES A BACHELOR'S DEGREE OR HIGHER</b>			
General and Operations Managers	67,360	\$119,561	8,014
Registered Nurses	48,820	\$120,813	20,121
Accountants and Auditors	46,420	\$79,926	4,109
Management Analysts	36,080	\$88,502	3,468
Market Research Analysts and Marketing Specialists	35,160	\$74,445	4,449
<b>REQUIRES SOME COLLEGE, POSTSECONDARY NON-DEGREE AWARD, OR ASSOCIATE'S DEGREE</b>			
Bookkeeping, Accounting, and Auditing Clerks	60,600	\$50,073	4,426
Heavy and Tractor-Trailer Truck Drivers	50,410	\$51,022	8,439
Medical Assistants	32,150	\$40,938	3,980
Dental Assistants	29,340	\$44,543	3,334
Hairdressers, Hairstylists, and Cosmetologists	28,520	\$31,180	970
<b>REQUIRES A HIGH SCHOOL DIPLOMA OR EQUIVALENT OR LESS</b>			
Retail Salespersons	194,060	\$32,874	18,015
Cashiers	187,060	\$31,332	4,234
Laborers and Freight, Stock, and Material Movers, Hand	167,580	\$33,102	9,600
Waiters and Waitresses	144,260	\$30,600	6,428
Farmworkers and Laborers, Crop, Nursery, and Greenhouse	110,540	\$29,379	148

<sup>1</sup> For the 2020-2022 period, California's two-year occupational projections are based on employment from the second quarter of 2020 and project to the second quarter of 2022. These numbers reflect the sum of new jobs and replacements, when employees permanently leave their occupations or the labor force all together. Many jobs are a result of replacements, not growth within an occupation.

<sup>2</sup> EDD/LMID Occupational Employment and Wage Statistics; 2021 Wages reflect California median annual wage. Median is the point at which half of workers earn more and half earn less. The wages are from the 2021 first quarter and do not include self-employed or unpaid family workers.

<sup>3</sup> Job Ads June 19, 2021 - August 17, 2021 are pulled from Burning Glass Technologies Labor Insight™ data series. Burning Glass Technologies Labor Insight™ data series compiles, analyzes, and categorizes job advertisements from numerous online job boards.

## Toolbox for Job Seekers

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For a collection of resources to assist job seekers with job search, career exploration, and training needs, visit the [Toolbox for Job Seekers](#).

## Glossary

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For definitions of terms used in this Briefing, as well as other terms commonly used in connection with employment and labor market information, visit the [Glossary of Terms](#).

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