CALIFORNIA JOBS MARKET BRIEFING 2022

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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 5, 2022.

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

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Unemployment in California has fallen to historically low levels.

- In July 2022, California's unemployment rate fell to 3.9 percent—the lowest unemployment rate since the data series began in 1976.
- The July 2022 unemployment rate was 0.2 percentage points lower than before the pandemic in February 2020.
- California's unemployment rate has fallen steadily over the course of the ongoing recovery.

California is on the brink of fully recovering the jobs it lost during the pandemicinduced recession.

- California has enjoyed steady and rapid job growth over the course of its ongoing recovery. The state added 84,800 nonfarm jobs over the month in July 2022, boosting total nonfarm employment in California to over 17.6 million jobs.
- From April 2020 through July 2021, California added 1,945,100 nonfarm jobs, adding an average of 129,700 jobs per month and growing at an annualized pace of 10.4 percent over the 15-month period.
- California has recovered over 97 percent of the pandemic-related job losses.

California's job gains over the course of the recovery have been broad-based across industry sectors. Five industry sectors fully recovered their pandemic job losses.

- California's job gains over the course of the April 2020-July 2022 recovery were welldistributed across industry sectors.
- The hard-hit leisure and hospitality sector gained more jobs than any other sector, adding 835,000 jobs.
- Occupations that are expected to continue strong growth include software development, general and operations management, nursing, elementary school teaching, accounting, heavy truck and tractor-trailer driving, and medical, nursing and teaching assistants.

Table of Contents

California's Labor Market Has Rebounded from the Pandemic-Induced Recession and Continues to Exhibit Strength	1
	1
Unemployment in California has fallen to historically low levels.	
Figure 1: California's Unemployment Rate Has Fallen to a Record Low	1
TOTAL NONFARM EMPLOYMENT (SEASONALLY ADJUSTED JOBS)	2
California is on the brink of fully recovering the jobs it lost during the pandemic-induced recession	
Figure 2: California Has Recovered 97.3 Percent of Its Pandemic-Induced Job Losses	
INDUSTRY SECTOR TRENDS (SEASONALLY ADJUSTED DATA)	3
California's job gains over the course of the recovery have been broad-based across industry	
sectors. Five industry sectors fully recovered their pandemic job losses.	
Figure 3: Industry Sectors in Recession	
Figure 4: Industry Sectors in Recovery	
Figure 5: Five California Industry Sectors Have Fully Recovered Their Job Losses	
REGIONAL TRENDS (NOT SEASONALLY ADJUSTED DATA)	
Every California region has contributed to the state's economic recovery.	
Unemployment rates have fallen to record low levels in every California region Figure 6: Regional Unemployment Rates in July 2022	
Every region of California has experienced job growth over the last year	
Figure 7: Regional Job Growth in July 2021	
Figure 8: Regional Job Growth in July 2022	
OUTLOOK	
California Short-Term Industry and Occupational Employment Projections	.12
Industry Employment Projections 2021 2nd Quarter - 2023 2nd Quarter	. 12
Occupational Employment Projections 2021 2nd Quarter - 2023 2nd Quarter	
California Jobs in Demand	.14
Figure 9: Top 5 Projected Job Openings by Education Level	. 14
Toolbox for Job Seekers	.15
Glossary	.15

California's Labor Market Has Rebounded from the Pandemic-Induced Recession and Continues to Exhibit Strength

As the nation commemorates Labor Day in 2022, California's labor market has overcome the most disruptive effects of the COVID-19 pandemic and is on the brink of fully recovering the jobs it lost during the pandemic-induced recession. Unemployment has fallen to historic lows throughout the state and employment continues to grow at a rapid pace. Yet, even as available data show that California's labor market is strong, aggressive measures by the U.S. Federal Reserve to contain stubbornly high inflation raise the risks that there may be bumpier days to come.

UNEMPLOYMENT

Unemployment in California has fallen to historically low levels.

- California's seasonally adjusted unemployment rate increased from 4.1 percent in February 2020 to a record high of 16.1 percent in May 2020 in the aftermath of the COVID-19 pandemic. This was an unprecedented increase in both magnitude and short duration.
- California's unemployment rate has fallen steadily over the course of the ongoing recovery. In July 2022, California's unemployment rate fell 0.3 percentage point over the month to 3.9 percent. Not only was the July rate 0.2 percentage point lower than it was before the pandemic in February 2020, but it established a new record low in the official data series that extends back to the beginning of 1976.



Figure 1: California's Unemployment Rate Has Fallen to a Record Low



- Correspondingly, the number of unemployed Californians shot up from 803,000 persons in February 2020 to a record high of 3,002,000 persons in May 2020 during the pandemic-induced recession, which was a nearly four-fold increase.
- The number of unemployed Californians has fallen steadily over the course of the ongoing recovery. In July 2022, civilian unemployment fell by 47,000 persons over the month to 759,000. This was the state's 13th consecutive month of unemployment decreases. In July 2022, there were 2,243,000 fewer unemployed Californians than there were at the recessionary peak in May 2020 and 44,000 fewer than there were prior to the pandemic in February 2020. In fact, the number of unemployed persons in the state had fallen to its lowest level since October 1989, for a 33-year low, despite the labor force being 4.7 million persons larger.

TOTAL NONFARM EMPLOYMENT (SEASONALLY ADJUSTED JOBS)

California is on the brink of fully recovering the jobs it lost during the pandemic-induced recession.

 California lost 2,758,900 nonfarm jobs during the pandemic-induced recession from February 2020 through April 2020, including nearly 2.6 million jobs in the month of April 2020 alone. This was an unprecedented 15.6 percent job loss over just a two-month period. Job losses were deep and widespread across all sectors of the economy and regions of the state.



Figure 2: California Has Recovered 97.3 Percent of Its Pandemic-Induced Job Losses

Source: Employment Development Department

 California has enjoyed steady and rapid job growth over the course of its ongoing recovery. The state added 84,800 nonfarm jobs over the month in July 2022, boosting total nonfarm employment in California to over 17.6 million jobs. This was the state's 10th consecutive month of job increases and its 17th in the last 18 months. The state added 2,685,100 nonfarm jobs from the recession low point in April 2020 through July 2022, which was an 18.0 percent increase. As of July 2022, California had recovered 97.3 of its pandemic-induced job losses, leaving total nonfarm employment just 73,800 jobs shy of its pre-pandemic level in February 2020.¹

- California's rate of job growth moderated over the last year following a surge in hiring that accompanied the easing and eventual removal of pandemic-related, public health restrictions on economic activity², but continued at a historically robust pace. From April 2020 through July 2021, California added 1,945,100 nonfarm jobs, adding an average of 129,700 jobs per month and growing at an annualized pace of 10.4 percent over the 15-month period. In contrast, the state added 740,000 jobs over the 12-month period ending in July 2022, adding an average of 61,700 nonfarm jobs per month and growing at a 4.4 percent pace. Even the state's more moderate pace of year-over job growth in July 2022 exceeded that of any month prior to the pandemic.
- The slowing pace of job growth in California is consistent with that of an economy returning to normal following the severe disruptions caused by the COVID-19 pandemic. As such, it would not be surprising for job growth in the state to moderate further in the months to come. However, a slowing pace of job growth is not an indicator of an economic recession, which is characterized by rising unemployment and job losses that deepen and spread throughout the economy over time. As of July 2022, California's unemployment and jobs data exhibited none of these recession symptoms.

INDUSTRY SECTOR TRENDS (SEASONALLY ADJUSTED DATA)

California's job gains over the course of the recovery have been broad-based across industry sectors. Five industry sectors fully recovered their pandemic job losses.

- California's job losses during the pandemic-induced recession were widespread and deep across industry sectors. Every one of California's 11 major industry sectors lost jobs from February 2020 through April 2020. Leisure and hospitality had the largest job losses of any sector. Its 990,200-job loss, from February 2020 through April 2020, accounted for one out every three (35.9 percent) of the state's total job losses. Three additional sectors—trade, transportation, and utilities (439,300); professional and business services (308,000), and educational and health services (297,900)—had losses of around 300,000 jobs or more, and three more—other services (199,000), construction (167,400), and manufacturing (123,500)—lost more than 100,000 jobs.
- In percentage terms, leisure and hospitality lost nearly half (48.1 percent) of its jobs during the recession and other services lost one-third (33.5 percent) of its jobs. Five additional sectors suffered job losses of more than 10 percent: construction (18.4 percent); trade, transportation, and utilities (14.3 percent); information (14.0 percent); professional and business services (11.1 percent); and educational and health services (10.4 percent). The manufacturing and mining and logging sectors each had a 9.3

¹ California would have already achieved full recovery of the jobs it lost during the recession were it not for losses totaling 180,100 jobs in the months of December 2020 and January 2021, when the state temporarily imposed stricter public health measures to mitigate a surge in the number of COVID-19 cases fueled by the Delta variant.

² California lifted all remaining pandemic public health restrictions on June 15, 2021. The immediate effects of this action would have been picked up in July 2021 estimates.

percent job loss. Financial activities (6.2 percent) and government (3.7 percent) had the smallest percentage job losses.³



Figure 3: Industry Sectors in Recession



³ The government loss is deceiving because its losses continued through June 2020. All told, government lost 204,200 jobs from February 2020 through June 2020, which was a 7.8 percent decrease.



Figure 4: Industry Sectors in Recovery

Source: Employment Development Department

- California's job gains over the course of the April 2020-July 2022 recovery were well-distributed across industry sectors. Only mining and logging, the state's smallest sector, registered a job loss over the period. The hard-hit leisure and hospitality sector gained more jobs than any other sector, adding 835,000 jobs. Three additional sectors have added more than 350,000 jobs: trade, transportation, and utilities (532,100); professional and business services (381,300); and educational and health services (351,600). Four more added around 100,000 jobs or more: construction (180,600); other services (158,100); manufacturing (105,600); and information (99,200).
- Leisure and hospitality (78.0 percent) has grown at the fastest pace of any sector over the course of the April 2020-July 2022 recovery-to-date, followed by other services (40.1 percent). Three additional industry sectors have had larger percentage job increases than the overall economy's 18.0 percent increase: construction (24.3 percent); trade, transportation, and utilities (20.3 percent); and information (19.5 percent). Two more—professional and business services (15.5 percent) and educational and health services (13.6 percent)—have grown by more than 13.0 percent. In contrast, manufacturing (8.8 percent), financial activities (4.4 percent), and government (0.3 percent) have had considerably smaller percentage gains and mining and logging has had a 5.9 percent job loss.
- As of July 2022, five California industry sectors—professional and business services; trade, transportation, and utilities; information; educational and health services; and construction—had fully recovered the jobs they lost during the pandemic-induced recession. Three additional sectors were well down the road to full recovery, having

recovered four-fifths or more of their job losses: manufacturing (85.5 percent); leisure and hospitality (84.3 percent); and other services (79.4 percent). In contrast, the recovery in financial activities (67.0 percent) and government (8.0 percent) lagged those in other sectors and mining and logging had yet to show signs of recovery.⁴



Figure 5: Five California Industry Sectors Have Fully Recovered Their Job Losses

Source: Employment Development Department

- California's year-over job gains in July 2022 were also well distributed across the economy, with all industry sectors adding jobs. However, the pace of job growth was slower than it was during the first 15 months of the recovery in nine industry sectors. Leisure and hospitality; other services, and to a lesser extent, construction and trade, transportation, and utilities, exhibited the most pronounced slowdown in their pace of job growth in the government and mining and logging sectors strengthened.
- Leisure and hospitality (172,600) had the largest year-over job gain of any sector in July 2022, followed by professional and business services (138,700) and trade, transportation, and utilities (117,200). Educational and health services (96,600) and government (59,500) each added more than 50,000 jobs. Four additional sectors added more than 30,000 jobs: construction (45,100); manufacturing (36,600); other services

⁴ Government was actually farther along in its recovery than the April 2020 recession dating shows, having recovered 115,400, or 56.5 percent, of the 204,200 jobs it lost from February 2020 through June 2020.

(36,400); and information (30,500). Financial activities and mining and logging added 6,300 and 500 jobs, respectively.

- In percentage terms, leisure and hospitality (10.0 percent) had the largest year-over gain of any sector in July 2022, followed by other services (7.1 percent). Three additional sectors grew at a more than 5.0 percent: information (5.3 percent); professional and business services (5.1 percent); and construction (5.1 percent). The pace of job growth in each of these five industry sectors was stronger than that of the overall economy, which grew at a 4.4 percent rate over the year. However, trade, transportation, and utilities (3.9 percent); educational and health services (3.4 percent); manufacturing (2.9 percent); and mining and logging (2.7 percent) all had healthy year-over gains of more than 2.5 percent. Government and financial activities had year-over gains of 2.4 percent and 0.8 percent, respectively.
- Finally, California's strong 84,800-job gain in July 2022 was also well-distributed across industry sectors, with 10 adding jobs and only one losing them. The largest gains were in professional and business services (20,500) and educational and health services (20,500), followed by leisure and hospitality (14,900) and construction (11,400). Four additional sectors added more than 4,000 jobs: other services (4,900); government (4,500); information (4,400); and trade, transportation, and utilities (4,100). Manufacturing (1,400) and mining and logging (100) also had month-over job gains. Financial activities (1,900) was the only sector that lost jobs in July 2022.

REGIONAL TRENDS (NOT SEASONALLY ADJUSTED DATA)

Every California region has contributed to the state's economic recovery.

- 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.⁵
- California's regions vary greatly in size. Los Angeles Basin, with 4.5 million jobs in July 2022, was the state's largest region, followed by Bay-Peninsula with over 2.3 million jobs. Six additional regions had more than one million jobs, and one had more than 500,000. As a group, the state's nine largest regions accounted for 91.2 percent of the state's more than 17.5 million jobs in July 2022 (not seasonally adjusted). At the opposite end of the size spectrum, four regions had between 235,000 and 315,000 jobs, and two (Middle Sierra and North Coast County) had less than 50,000 jobs.
- 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 focuses on comparisons for the month of July. Tracking the

⁵ 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.

recovery from the pandemic-induced recession at the regional level would require seasonally adjusted data.

Unemployment rates have fallen to record low levels in every California region.

- In July 2020, when the recovery was still in its infancy, every region of the state was experiencing high unemployment. All 15 California regions had unemployment rates of 10.0 percent or more, ranging from a low of 10.0 percent in South Central Coast to a high of 18.4 percent in Los Angeles Basin.
- In July 2022 each of California's 15 regions had a record low unemployment rate for the month of July 2022, with a record-tying low rate in Los Angeles Basin, in a data series extending back to the beginning of 1990.⁶ Regional unemployment rates ranged from a low of 2.1 percent in Bay-Peninsula to a high of 5.9 percent in San Joaquin Valley in July 2022. Three regions—Bay-Peninsula (2.1 percent); South Central Coast (2.7 percent); and Orange (2.8 percent)—had unemployment rates below 3.0 percent. Nine additional regions had unemployment rates below 4.0 percent. Only three regions had unemployment rates of 4.0 percent or more: North Central Coast (4.0 percent); Los Angeles Basin (5.0 percent); and San Joaquin Valley (5.9 percent).

⁶ Los Angeles Basin's 5.0 percent unemployment rate in July 2022 tied July 2019 as the lowest July unemployment rate on record.



Figure 6: Regional Unemployment Rates in July 2022



Every region of California has experienced job growth over the last year.

 In July 2021, when the recovery was 15 months old, each of California's 15 regions exhibited positive year-over job growth. Year-over job gains ranged from a low of 2,000 in North Coast County to a high of 353,000 in Los Angeles Basin. Four additional regions—Inland Empire, Orange, Bay-Peninsula, and Southern Border—added more than 100,000 jobs and three more—San Joaquin Valley, East Bay, and Capital—added more than 70,000.

- In percentage terms, year-over job increases in the state's largest regions ranged from a low of 5.8 percent in Bay-Peninsula to a high of 8.9 percent in both Los Angeles Basin and Inland Empire in July 2021. Year-over percent job increases in the state's smallest regions ranged from a low of 4.5 percent in North State and North Coast County to a high of 7.9 percent in North Central Coast.
- In July 2022, each of California's 15 regions also had positive year-over job growth, but the pace of growth had slowed in comparison to July 2021 in every region except Bay-Peninsula. Year-over job gains ranged from a low of 700 jobs in Middle Sierra to a high of 174,000 jobs in Los Angeles Basin. Bay-Peninsula (133,100) was the only other region that had a year-over gain of more than 100,000 jobs. Only two additional regions—Inland Empire and Orange—added more than 70,000 jobs.



Figure 7: Regional Job Growth in July 2021

Source: Employment Development Department





Source: Employment Development Department

- In July 2022, year-over percent job increases in the state's largest regions ranged from a low of 2.9 percent in North Bay to a high of 6.0 percent in Bay-Peninsula. The rate of year-over job growth equaled or exceeded the overall economy's 4.3 percent rate in four regions: Southern Border; Orange; Inland Empire; and Bay-Peninsula. Year-over job increases in the state's smallest regions ranged from a low of 1.6 percent in Middle Sierra to a high of 3.7 percent in North Coast County.
- Bay-Peninsula was the only California region that had a stronger rate of year-over job growth in July 2022 than in July 2021, although the improvement was not large. Every other region had slower year-over job growth in July 2022 than in July 2021. Nevertheless, year-over job growth continued at a strong pace across most regions of the state in July 2022.
- Thirteen of California's 15 regions had larger year-over percentage job gains in July 2022 than they had prior to the pandemic in February 2020, and one, South Central Coast, had an equal gain. Middle Sierra was the only region that had a weaker year-over growth. The rate of year-over job growth in July 2022 in both Bay-Peninsula and Los Angeles Basin was stronger than that of any month prior to the pandemic in a data series extending back to the beginning of 1990. The pace of year-over job growth in four additional regions—Orange, San Joaquin Valley, Southern Border, and Ventura—was stronger than that of any month during the February 2010-February 2020 expansion.

The pace of year-over job growth in Capital, East Bay, North Bay, North Central Coast, and North State rivaled that of some of the strongest months of this expansion.

OUTLOOK

As California continues to recover from the pandemic-induced recession, labor market conditions in the state are strong. Unemployment has fallen to historically low levels throughout the state and California continued to add jobs at a respectable pace across most industry sectors and economic regions. The dramatic pace of job growth slowed over the last year as the state's labor market returns to normal.

However, persistently high inflation, an unstable geopolitical environment, and the ever-present possibility of a resurgent pandemic loom among the downside risks to the aforementioned outlook. The U.S. Federal Reserve has adopted aggressive monetary policies to rein in stubbornly high inflation, most notably by increasing interest rates. These rate hikes are designed to dampen demand for goods and services and cool labor markets by increasing the costs of borrowing for businesses and consumers, thus easing upward price and wage pressures within the economy.

The Federal Reserve is undertaking a delicate balancing act as it tries to engineer a soft landing for the U.S. economy. History suggests that if it pushes too hard and overshoots the mark, there is a very real possibility that the economy will fall into a recession. If it doesn't push hard enough, high inflation will likely persist. Although California's labor market continues to grow this Labor Day, there is an elevated risk that a recession may occur sometime in the next 12 to 18 months.

California Short-Term Industry and Occupational Employment Projections

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 2021 2nd Quarter - 2023 2nd Quarter

The EDD projects a statewide total employment increase of 1,292,200 jobs (7.2 percent) between the second quarter of 2021 and the second quarter of 2023, reaching nearly 19.3 million jobs. Four industry sectors are projected to grow faster than California's total employment change of 7.2 percent. These four industry sectors are projected to grow between 7.7 and 25.1 percent. Approximately 61.5 percent of the total projected nonfarm job growth is in three industry sectors: leisure and hospitality; professional and business services; and educational services (private), health care, and social assistance.

• The largest number of new jobs is expected in the leisure and hospitality industry sector, resulting in a gain of 390,400 jobs and a growth rate of 25.1 percent. Within this industry sector, the food services and drinking places subsector is projected to post the largest gains with 276,000 jobs.

• The professional and business services sector is projected to gain 204,100 jobs with a growth rate of 7.7 percent. Recording the biggest gains will be the professional, scientific, and technical services subsector which is projected to add 121,200 jobs.

The educational services (private), health care, and social assistance sector is expected to add 156,300 jobs with a growth rate of 5.6 percent. Forty-nine percent of the industry's job growth is projected to be in the social assistance subsector, a gain of 76,900 jobs.

Occupational Employment Projections 2021 2nd Quarter - 2023 2nd Quarter

Occupational employment growth is expected to be robust in industries that are projected to have high growth between the second quarter of 2021 and the second quarter of 2023. The occupational groups with the most growth forecasted are food preparation and serving related (282,800); transportation and material moving (107,300); and education, training, and library (99,200). The top three occupational groups account for over a third of all projected job growth.

The top 10 fastest growing occupations are expected to add jobs at a rate of 27.3 percent or higher, compared to the expected overall 7.2 percent growth rate for California. Personal care and service occupations make up 6 of the top 10 occupations on the list.

In addition to new jobs, job openings will also be created due to workers separating from their job. Worker separations include those exiting the labor force or transferring to a different occupation. California is expected to generate a combined total of nearly 5.4 million job openings over the projections period, with exits and transfers comprising 76 percent of this total. The top 10 occupations with the most job openings are expected to generate nearly 1.4 million total job openings. Nine of the top 10 occupations have more openings due to transfers than exits.

The 2021-2023 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 2021-2023), annual earnings, and online job advertisements. Occupations are separated into three categories based on education 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 CalJOBSSM, California's labor exchange system.

Occupation	Projected 2021- 2023 Job Openings ⁷	2022 Median Annual Wages ⁸	Job Ads in Last 60 Days ending August 7, 2022 ⁹			
REQUIRES A BACHELOR'S DEGREE OR HIGHER						
Software Developers and Software Quality Assurance Analysts and Testers	72,040	[10]	29,250 ¹¹			
General and Operations Managers	60,430	\$111,064	11,118			
Registered Nurses	43,870	\$129,851	34,947			
Elementary School Teachers, Except Special Education	38,950	\$82,900	1,095			
Accountants and Auditors	37,080	\$82,940	7,081			
REQUIRES SOME COLLEGE, POSTSECONDARY NON-DEGREE AWARD, OR ASSOCIATE'S DEGREE						
Heavy and Tractor-Trailer Truck Drivers	49,570	\$51,496	14,334			
Bookkeeping, Accounting, and Auditing Clerks	47,550	\$49,900	5,027			
Teaching Assistants, Except Postsecondary	45,170	\$38,642	1,869 ¹²			
Medical Assistants	31,050	\$41,342	4,755			
Nursing Assistants	26,620	\$39,924	5,268			

Figure 9: Top 5 Projected Job Openings by Education Level

⁷ For the 2021-2023 period, California's two-year occupational projections are based on employment from the second quarter of 2021 and project to the second quarter of 2023. 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.

⁸ EDD/LMID Occupational Employment and Wage Statistics; 2022 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 2022 first quarter and do not include self-employed or unpaid family workers.

⁹ Job Ads June 9, 2022 – August 7, 2022 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.

¹⁰ An estimate of wage could not be provided.

¹¹ Job Ads for Software Developers and Software Quality Assurance Analysts and Testers are the sum of Software Developers, Applications and Software Developers, Systems Software.

¹² Job Ads for Teaching Assistants, Except Postsecondary are taken from Teacher Assistants.

Occupation	Projected 2021- 2023 Job Openings ⁷	2022 Median Annual Wages ⁸	Job Ads in Last 60 Days ending August 7, 2022 ⁹		
REQUIRES A HIGH SCHOOL DIPLOMA OR EQUIVALENT OR LESS					
Fast Food and Counter Workers	243,860	\$32,461	12,081 ¹³		
Home Health and Personal Care Aides	219,670	\$31,641	9,057		
Cashiers	155,810	\$31,200 ¹⁴	5,550		
Laborers and Freight, Stock, and Material Movers, Hand	139,050	\$38,493	9,495		
Waiters and Waitresses	138,980	\$32,270	7,190		

Toolbox for Job Seekers

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

Glossary

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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¹³ Job Ads for Fast Food and Counter Workers are the sum of Combined Food Preparation and Serving Workers, including Fast Food and Counter Attendants, Cafeteria, Food Concession, and Coffee Shop.

¹⁴ Median Annual Wages have been rounded up to \$31,200 to reflect state minimum wage laws as of January 1, 2022.