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CEO
LAEDC
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California Blueprint for a Safer Economy

The Four-Tier Reopening Plan...

Tier 1: WIDESPREAD
Many non-essential indoor business operations are closed

Tier 2: SUBSTANTIAL
Some non-essential indoor business operations are closed

Tier 3: MODERATE
Some indoor business operations are open with modifications

Tier 4: MINIMAL
Most indoor business operations are open with modifications

Source: California ALL
California Blueprint for a Safer Economy

Current Tier Assignments as of February 16, 2021

**STATEWIDE METRICS**

- **24.2** New COVID-19 positive cases per day per 100K
- **6.5%** Positivity rate (7-day average)
- **17.2%** ICU availability

**REGIONAL ICU CAPACITY**

**COUNTY RISK LEVELS**

- **Widespread**: 52 Counties, Population 40,047,224
- **Substantial**: 3 Counties, Population 64,350
- **Moderate**: 3 Counties, Population 17,586

Last Updated 2/16/2021

Source: California ALL
LA County now has 1,179,063 total confirmed cases (2/19)
33% of Cases in CA
40% of COVID-19 Deaths in CA
New Daily Cases of COVID-19 in LA County (2/18)

<table>
<thead>
<tr>
<th>Date</th>
<th>Current Hospitalizations</th>
<th>Target</th>
<th>Actual</th>
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</thead>
<tbody>
<tr>
<td>2/18</td>
<td>3-Day Average: 2,751</td>
<td>No increase over past 14 days</td>
<td>Down -47%</td>
</tr>
<tr>
<td>Testing 7-Day Daily Average - Target: 15,000</td>
<td>Actual: 56,630-day average (2/13)</td>
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<tr>
<td>Testing Positivity Rate: 5.20% 7-day average (2/19)</td>
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</tr>
<tr>
<td>Daily Deaths 7-Day Average – Target: No increase over past 14 days</td>
<td>Actual: Down -38%</td>
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</tr>
</tbody>
</table>
Vaccine Distribution in LA County (as of 2/14/21)

**DOSES ADMINISTERED**

**Administered**
- 91.6%
- As of 2/18/2021
- **1,676,900**
- Second Doses: 471,162

**Available**
- 8.4%

**ACTIVE VACCINATING**

**PHASE 1A**
- Healthcare Workers
- Staff & Residents at Skilled Nursing Facilities
- Staff & Residents at Long-Term Care Facilities

**PHASE 1B**
- Tier 1
  - LA County Residents 65 and Older

**ESTIMATED TIMELINE FOR REST OF**

**PHASE 1B**

**March**
- Tier 1
  - Education and Childcare
  - Emergency Services
  - Food and Agriculture

The state has announced that it is changing its vaccine rollout strategy in California after completion of Phase 1B, Tier 1 (Education and Childcare, Emergency Services, Food and Agriculture). The state plans to transition to age-based eligibility, allowing California to scale up and down quickly, while ensuring vaccine goes to disproportionately impacted communities.

Source: LA County Public Health
Vaccinations by Cities/Communities

PERCENTAGE VACCINATED 18 AND OLDER (as of 2/14/21)

- White: 33.5%
- Latinx: 23.1%
- Asian: 19.1%
- Other: 13.0%
- Black: 5.2%
- Other: 6.2%

Vaccine Distribution by Race/Ethnicity

- White: 33.5%
- Latinx: 23.1%
- Asian: 19.1%
- Other: 13.0%
- Black: 5.2%
- Other: 6.2%
CA Stay at home order issued March 19th

- Claims processed through the pandemic reached 20.3 million
- Extra federal stimulus payment of $300 started December 27th
- Total unemployment benefits paid to workers through the pandemic reach $122 billion

Source: CA EDD
Local Employment Data Covering January and February Released in March

Covered on our next Economic Briefing on March 29th
Pathways for Economic Resiliency: Los Angeles County 2021-2026

Released February 9, 2021
Hardest Hit Industries in Los Angeles County

**HOSPITALITY**


**125,900 JOBS LOST YEAR OVER YEAR**

Jobs Added May-October 2020: **94,200** (45.5% Recovered from March/April Job Losses)

Impacted Occupations: **Waiters and Waitresses** (25,090 Jobs Lost); **Cooks, Restaurant** (13,100 Jobs Lost)

**ARTS, ENTERTAINMENT & RECREATION**


**37,300 JOBS LOST YEAR OVER YEAR**

Jobs Added May-October 2020: **15,700** (38.1% Recovered from March/April Job Losses)

Impacted Occupations: **Amusement & Rec Attendants** (3,670 Jobs Lost); **Ushers & Lobby Attendants** (2,400 Jobs Lost)

**MOTION PICTURE & SOUND RECORDING**


**36,500 JOBS LOST YEAR OVER YEAR**

Jobs Added May-October 2020: **8,700** (15.2% Recovered from March/April Job Losses)

Impacted Occupations: **Producers & Directors** (6,600 Jobs Lost); **Actors** (4,660 Jobs Lost)
Hardest Hit Industries in Los Angeles County

NON-ESSENTIAL RETAIL

EMPLOYMENT SEP. 2019: 106,000  EMPLOYMENT SEP. 2020: 82,600 ↓ 22%

23,400 JOBS LOST YEAR OVER YEAR

Jobs Added May-October 2020: 31,500 (58.4% Recovered from March/April Job Losses)
Impacted Occupations: Retail Salespersons (10,570 Jobs Lost); Cashiers (5,160 Jobs Lost)

PERSONAL CARE & LAUNDRY SERVICES

EMPLOYMENT SEP. 2019: 58,300  EMPLOYMENT SEP. 2020: 37,900 ↓ 35%

20,400 JOBS LOST YEAR OVER YEAR

Jobs Added May-October 2020: 12,400 (44.0% Recovered from March/April Job Losses)
Impacted Occupations: Hairdressers & Hairstylists (2,560 Jobs Lost); Manicurists & Pedicurists (1,970 Jobs Lost)
<table>
<thead>
<tr>
<th>Industry</th>
<th>Jobs Recovered</th>
<th>Jobs Lost</th>
</tr>
</thead>
<tbody>
<tr>
<td>Services to Buildings &amp; Dwellings</td>
<td>41.8%</td>
<td>58.2%</td>
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<tr>
<td>Repair &amp; Maintenance</td>
<td>15.5%</td>
<td>84.5%</td>
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<tr>
<td>Child Day Care Services</td>
<td>65.9%</td>
<td>34.1%</td>
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<tr>
<td>Department Stores</td>
<td>28.4%</td>
<td>71.6%</td>
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<tr>
<td>Motor Vehicle &amp; Parts Dealer</td>
<td>49.5%</td>
<td>50.5%</td>
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<tr>
<td>Real Estate &amp; Rental &amp; Leasing</td>
<td>25.5%</td>
<td>74.5%</td>
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<tr>
<td>Apparel Manufacturing</td>
<td>36.8%</td>
<td>63.2%</td>
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<tr>
<td>General Merchandise Stores</td>
<td>46.8%</td>
<td>53.2%</td>
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<tr>
<td>Offices of Dentists</td>
<td>47.7%</td>
<td>52.3%</td>
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<tr>
<td>Transportation &amp; Warehousing</td>
<td>25.6%</td>
<td>74.4%</td>
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<tr>
<td>Construction</td>
<td>75.1%</td>
<td>24.9%</td>
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<tr>
<td>Accommodation</td>
<td>2.3%</td>
<td>97.7%</td>
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<tr>
<td>Wholesale Trade</td>
<td>53.8%</td>
<td>46.2%</td>
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<tr>
<td>Amusement, Gambling &amp; Recreation</td>
<td>1.3%</td>
<td>98.7%</td>
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<tr>
<td>Employment Services</td>
<td>63.8%</td>
<td>36.2%</td>
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<tr>
<td>Personal &amp; Laundry Services</td>
<td>29.4%</td>
<td>70.6%</td>
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<td>Professional, Scientific &amp; Technical Services</td>
<td>14.2%</td>
<td>85.8%</td>
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<td>Clothing &amp; Clothing Accessories Stores</td>
<td>63.2%</td>
<td>36.8%</td>
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<tr>
<td>Arts, Entertainment &amp; Recreation</td>
<td>10.7%</td>
<td>89.3%</td>
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<tr>
<td>Other Services</td>
<td>12.1%</td>
<td>87.9%</td>
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<td>Individual &amp; Family Services</td>
<td>11.6%</td>
<td>88.4%</td>
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<tr>
<td>Administrative &amp; Support Services</td>
<td>49.8%</td>
<td>50.2%</td>
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<tr>
<td>Manufacturing</td>
<td>49.6%</td>
<td>50.4%</td>
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<tr>
<td>Social Assistance</td>
<td>26.7%</td>
<td>73.3%</td>
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<tr>
<td>Motion Picture &amp; Sound Recording</td>
<td>4.4%</td>
<td>95.6%</td>
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<tr>
<td>Information</td>
<td>3.6%</td>
<td>96.4%</td>
</tr>
<tr>
<td>Retail Trade</td>
<td>63.4%</td>
<td>36.6%</td>
</tr>
<tr>
<td>Food Services &amp; Drinking Places</td>
<td>43.9%</td>
<td>56.1%</td>
</tr>
</tbody>
</table>
Job Losses by Occupation Group in LA County

February 2020 to October 2020

Job Losses by Detailed Occupation Groupings in LA County
Feb 2020 - Oct 2020

- Restaurants: 25,090
  - Waiters & Waitresses: 13,100
  - Fast Food & Counter Workers: 4,930
- Retail Trade: 10,110
  - Retail Salespersons: 4,680
  - Cashiers: 2,300
- Film and Television: 6,600
  - Producers & Directors: 4,660
- Labor-Intensive: 6,330
  - Laborers & Freight/Stock/Material Movers, Hand: 3,990
- Recreation: 3,670
  - Amusement and Recreation Attendants: 2,400
  - Gambling Dealers: 930

Cooks, Restaurant
Retail Salespersons
Sales Representatives of Services
Actors
Janitors & Cleaners, Except Maids & Housekeeping Cleaners
Ushers, Lobby Attendants & Ticket Takers
Industries with Growth Potential in LA County

**HEALTH CARE**

Employment Sep. 2019: **440,110**  
Employment Sep. 2020: **444,400** ↑ 1%  
*4,300 Jobs Gained Year Over Year*

Jobs Added May-October 2020: **33,000** (Over 100% Recovered from March/April Job Losses)  
Impacted Occupations: Registered Nurses (790 Jobs Added); Medical Assistants (730 Jobs Added)

**INFRASTRUCTURE:**  
**CONSTRUCTION**

Employment Sep. 2019: **147,900**  
Employment Sep. 2020: **151,100** ↓ 2%  
*3,200 Jobs Lost Year Over Year*

Jobs Added May-October 2020: **20,400** (94% Recovered from March/April Job Losses)  
Impacted Occupations: Carpenters (210 Jobs Added); Construction Laborers (190 Jobs Added)

**TRADE AND LOGISTICS:**  
**TRANSPORTATION AND WAREHOUSING**

Employment Sep. 2019: **203,600**  
Employment Sep. 2020: **191,300** ↓ 6%  
*12,300 Jobs Lost Year Over Year*

Jobs Added May-October 2020: **8,300** (40.9% Recovered from March/April Job Losses)  
Impacted Occupations: Laborers & Freight/Stock/Material Movers (120 Jobs Lost); Heavy & Tractor-Trailer Truck Drivers (110 Jobs Lost)
Key Middle-Skill Occupations in Health Care Services And Average Wage in LA County 2020 to 2024

- **Medical Assistants** ($18.41): 26,710 jobs, 2,280 job change
- **Medical Secretaries and Administrative Assistants** ($20.78): 26,350 jobs, 2,250 job change
- **Receptionists and Information Clerks** ($16.67): 860 jobs, 10,100 job change
- **Registered Nurses** ($51.05): 82,940 jobs, 7,080 job change
Key Middle-Skill Occupations in Transportation & Warehousing

Key Middle-Skill Occupations in Transportation, Warehousing And Average Wage in LA County 2020 to 2024

- **Laborers and Freight, Stock, and Material Movers, Hand ($15.75)**: 35,360 (9,110) jobs
- **Heavy and Tractor-Trailer Truck Drivers ($23.02)**: 30,820 (7,940) jobs
- **Light Truck Drivers ($20.09)**: 14,200 (3,660) jobs
- **Stockers and Order Fillers ($15.43)**: 13,430 (3,460) jobs
- **Postal Service Mail Carriers ($24.68)**: 11,250 (2,890) jobs

2020 Jobs vs. Job Change 2020-24
Recommendations

To support the inclusive recovery of the Los Angeles economy...
LAEDC 2021
Economic Forecast
A tale of two recoveries
Released February 17, 2021
• Early 2020 proved to be the height of nearly ten years of strong economic growth for LA County; rapidly reversed beginning in March

• The severity of the economic crisis varies greatly across different cohorts, industries and sizes of business

• LA County alone lost 716,000 jobs during March and April, and the seasonally adjusted unemployment rate peaked at 21.1 percent in May 2020.

• The next two years will be characterized by economic recovery, the speed of which remains tied to the public health crisis.

• Under current conditions, it is estimated that the majority of industries will return to pre-pandemic employment levels by 2024.

• Mass inoculation against the COVID-19 virus is a clear and viable solution to the current public health crisis. Solving the subsequent economic crisis will prove much more difficult.

• COVID-19 has only increased the severity of pre-existing challenges and inequalities in Los Angeles County, and if left unchecked, it may continue to do so for years to come.
Economic Growth in California: Expected to return this year...

Real GDP Growth Forecast

California: 3.4% (2019), 2.0% (2020), 1.3% (2021), 3.3% (2022f), -0.6% (2022f)

Los Angeles County: 2.8% (2021f), 4.2% (2022f), -3.0% (2021f)

Sources: IHS, Forecast by LAEDC
The Labor Market Will Take More Time to Recover...

Unemployment Rate

<table>
<thead>
<tr>
<th></th>
<th>2019</th>
<th>2020</th>
<th>2021f</th>
<th>2022f</th>
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</thead>
<tbody>
<tr>
<td>California</td>
<td>4.1%</td>
<td>4.4%</td>
<td>9.3%</td>
<td>8.1%</td>
</tr>
<tr>
<td>LA County</td>
<td>10.4%</td>
<td>9.4%</td>
<td>7.8%</td>
<td>4.4%</td>
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</table>

Real Personal Income Growth

<table>
<thead>
<tr>
<th></th>
<th>2019</th>
<th>2020</th>
<th>2021f</th>
<th>2022f</th>
</tr>
</thead>
<tbody>
<tr>
<td>California</td>
<td>3.0%</td>
<td>3.9%</td>
<td>2.4%</td>
<td>2.8%</td>
</tr>
<tr>
<td>LA County</td>
<td>6.2%</td>
<td>-4.8%</td>
<td>1.1%</td>
<td>-1.7%</td>
</tr>
</tbody>
</table>

Sources: BLS, BEA, Forecast by LAEDC
Nonfarm Employment
**Monthly changes throughout the pandemic**

### California

<table>
<thead>
<tr>
<th>Month</th>
<th>Jobs Lost</th>
<th>Jobs Added</th>
<th>Total Lost</th>
</tr>
</thead>
<tbody>
<tr>
<td>Feb-20</td>
<td>-194,200</td>
<td>162,500</td>
<td>-356,700</td>
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<tr>
<td>Mar-20</td>
<td>-2,348,400</td>
<td>559,200</td>
<td>-1,789,200</td>
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<tr>
<td>Apr-20</td>
<td>-74,500</td>
<td>161,800</td>
<td>-1,593,700</td>
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<tr>
<td>May-20</td>
<td>-64,400</td>
<td>165,200</td>
<td>-1,748,600</td>
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<tr>
<td>Jun-20</td>
<td></td>
<td>262,700</td>
<td>262,700</td>
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<tr>
<td>Jul-20</td>
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<td>126,000</td>
<td>126,000</td>
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<td>Aug-20</td>
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<td>Dec-20</td>
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Recovery:
- **Nonfarm jobs lost in March & April:** 2,542,600 lost
- **Nonfarm jobs added May to December:** 1,298,500 added
- **Just 51.1% of jobs lost in March and April have returned**

### Los Angeles County

<table>
<thead>
<tr>
<th>Month</th>
<th>Jobs Lost</th>
<th>Jobs Added</th>
<th>Total Lost</th>
</tr>
</thead>
<tbody>
<tr>
<td>Feb-20</td>
<td>-16,400</td>
<td>4,700</td>
<td>-11,700</td>
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<tr>
<td>Mar-20</td>
<td>-63,000</td>
<td>40,300</td>
<td>-22,700</td>
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<td>Apr-20</td>
<td>-653,100</td>
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<tr>
<td>Dec-20</td>
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Recovery:
- **Nonfarm jobs lost in March & April:** 716,100 lost
- **Nonfarm jobs added May to December:** 318,600 added
- **Only 44.5% of jobs lost in March and April have returned**

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*LAEDC*
California Employment Forecast:

2 Year Employment Forecast

- Trade, Transportation, and Utilities
- Professional and Business Services
- Leisure and Hospitality
- Education and Health Services
- Other Services
- Government
- Information
- Financial Activities
- Construction, Natural Resources, and...
- Manufacturing

Sources: IHS, Forecast by LAEDC

Los Angeles
Other Southern CA
Rest of CA
A Tale of Two Recoveries: The Disparate Impacts of COVID-19

- Cases
  - Hispanic
- Unemployment
  - High School Education
  - Generation Z (ages 16 to 23 years)
  - Identify as Black/Asian
- Low-Income Households
- Unemployment Benefits
- Remote Work
- The Digital Divide
- Small and Micro-Businesses
- Women
- Industry
  - Hospitality
  - Arts, Entertainment and Leisure
  - Nonessential Retail
  - Personal Care Services
UPCOMING REPORT RELEASE

Register at the CCW website: https://competitiveworkforce.la/port-report-webinar/

Wednesday, February 24, 2021
2:00pm–3:00pm
QUESTIONS
Thank you!

• Next LAEDC Economic Briefing: March 29, 2021

• Visit the LAEDC COVID-19 Response page for additional resources at https://laedc.org/coronavirus/.

• Do you have questions you would like answered on these webinars? Please send to shane.cullen@laedc.org.