



2020 LABOR MARKET SCAN

Prepared for Stanislaus Mother
Lode Adult Education Consortium

December 2020

In the following report, Hanover Research presents the results of a scan of trends in the Mother Lode region-Calaveras and Tuolumne counties. The report focuses on programming appropriate for those at or below the associate's level and included a discussion of demographics, labor market demand indicators, and the impacts of COVID-19 on the local economy.



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EXECUTIVE SUMMARY

RECOMMENDATIONS

Based on an analysis of demographic and workforce indicators in Calaveras and Tuolumne Counties, Hanover recommends:

Expand programs in the skilled trades.

Demand for HVAC technicians and landscaping services professionals is expected to remain robust in the next five years.

Prioritize health care and allied health credentials at the associate's level and below for expansion, followed by human services and veterinary technology.

Demand for skilled health care professionals at the associate's level and below is solid in the two-county service region, and the health care sector is expected to recover quickly from the economic consequences of the pandemic. Five-year projections indicate growing demand for services for the elderly and persons with disabilities. The area also faces potential shortages of veterinary technologists and technicians. Regional job postings show continued strong demand for basic business skills including Microsoft Office suite and customer service.

Market programs toward workers with some college, but no degree.

Calaveras and Tuolumne counties have, in comparison to California and the nation, a high rate of residents (31.8 percent) that have attended some college but not graduated with a postsecondary degree. This share of the population may be interested in earning outstanding college credits to obtain an associate's degree in a high-demand occupation and/or industry. Moreover, the reviewed region has a smaller traditional student pool than California as only 23.6 percent of residents are under the age of 24 years old (in contrast to 33.1 percent in California).

KEY FINDINGS

Health Care Fields



The most promising program fields for new and expanded certificate programs and associates' degrees in the service region are health and allied health credentials and education and social services. Nursing, medical and health services managers, social and human services assistants (especially in elderly care), patient representatives, surgical technologists, and pharmacy technicians are in demand in the two-county service region and are expected to remain so throughout the 2020's. In the wake of the COVID-19 recession, the health care and social assistance sector is expected to have the fastest recovery of any industry.

Skills Analysis



Specific skills and certifications in highest demand within with the service region include the following:

- Basic Life Support
- CPR
- Registered Nurse
- Advanced Cardiac Life Support Certification
- Medical Assistant Certification
- Certified Nursing Assistant
- Certified Radiologic Technologist
- Certified Biomedical Equipment Technician
- First Aid Certification
- Emergency Number Professional

Non-Health Care Fields



While job postings in business and administrative support roles lag health care, there is demand for graduates of certificate and associate's programs in accounting and mathematics-related fields. Microsoft Office Suite, and particularly Excel, is a highly-sought skillset among regional employers. Soft skills such as communication, collaboration, and customer service are in high demand, as well. Nursing is the most widely-requested field of study at the associate's and certificate levels within the region, but the second, third, and fifth-most prevalent fields are accounting, mathematics, and finance.

INTRODUCTION

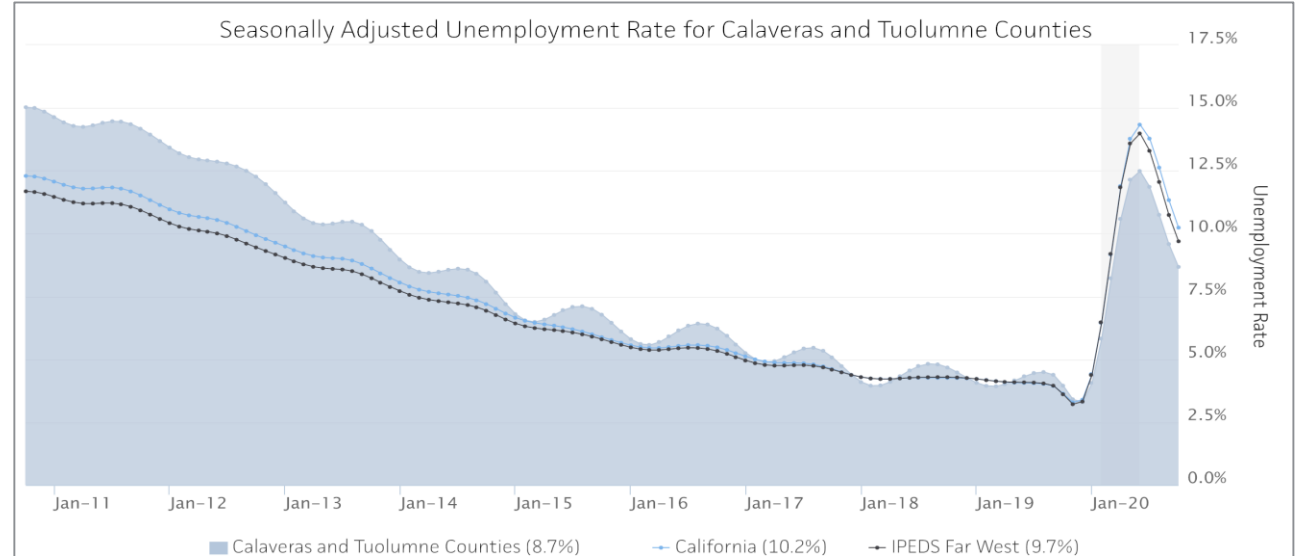
INTRODUCTION

The Stanislaus Mother Lode Adult Education Consortium is seeking information about labor market demand in Calaveras and Tuolumne Counties.

In the wake of the 2020 pandemic, unemployment in the region has spiked to 8.7 percent as of October 2020, compared to a state average of 10.2 percent, regional average of 9.7 percent, and a national average of 7.5 percent.

10 YEAR UNEMPLOYMENT RATES

Unemployment rates for the Calaveras and Tuolumne Counties (shaded), California (blue line), and IPEDS Far West region (black line), 2011-2020.



Source: JobsEQ, based on Bureau of Labor Statistics data. Data as of Oct 2020. The shaded areas of the graph represent national recessions.

REPORT CONTENTS AND STRUCTURE

Service Region Demographic and Economic Trends

- This section provides a demographic overview of the service area compared to California and the United States.

Service Region Labor Market Projections and Trends

- This analysis provides a detailed look at occupational and industry employment trends and projections for the region.

COVID-19 Impacts

- Provides additional information on the economic (and likely student demand) impacts of the COVID-19 pandemic, with a focus on industry employment trends and regional vulnerability.

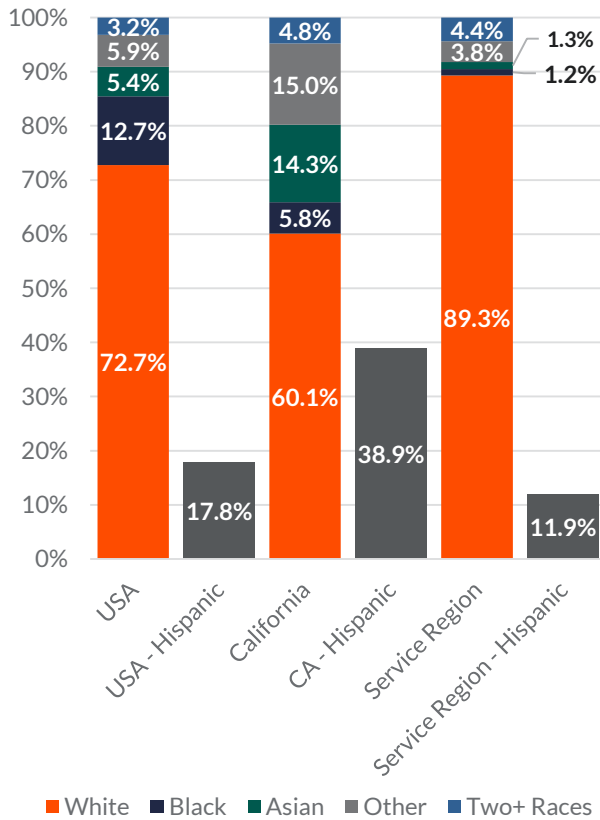
SERVICE REGION DEMOGRAPHIC PROJECTIONS AND TRENDS

- Race/Ethnicity and Income
- Educational Attainment by Geography

RACE/ETHNICITY AND INCOME

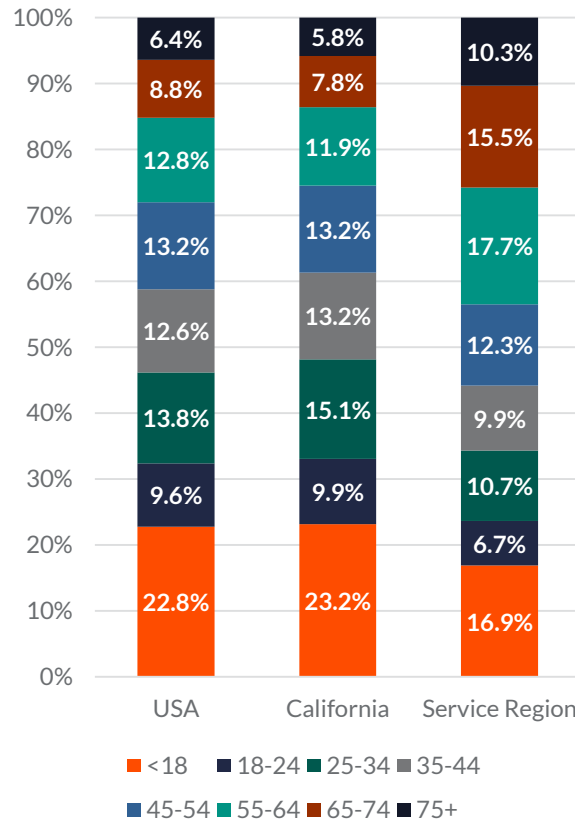
- The population of the service region is slightly older and more likely to be white than the state or national averages. Recruiting traditional undergraduates will be more difficult within the region than nationwide, given the lower proportion of residents under the age of 18. The service region has a markedly lower labor force participation rate among residents over the age of 16 than the state and national averages. While the region has a slightly lower poverty rate than California and the nation (compare 12.5 percent to 14.3 percent and 14.1 percent, respectively), the median household income is lower (\$57,218 in the region in contrast to 71,228 in California). The share of Hispanic residents (any race) in the region is considerably lower (11.9 percent) than the California average at 38.9 percent and the national average at 17.8 percent.

RACIAL DEMOGRAPHICS



Source: [JobsEQ](#)

AGE DEMOGRAPHICS



ECONOMIC INDICATORS

Region	Median Household Income
Service Region	\$57,218
California	\$71,228
USA	\$60,293

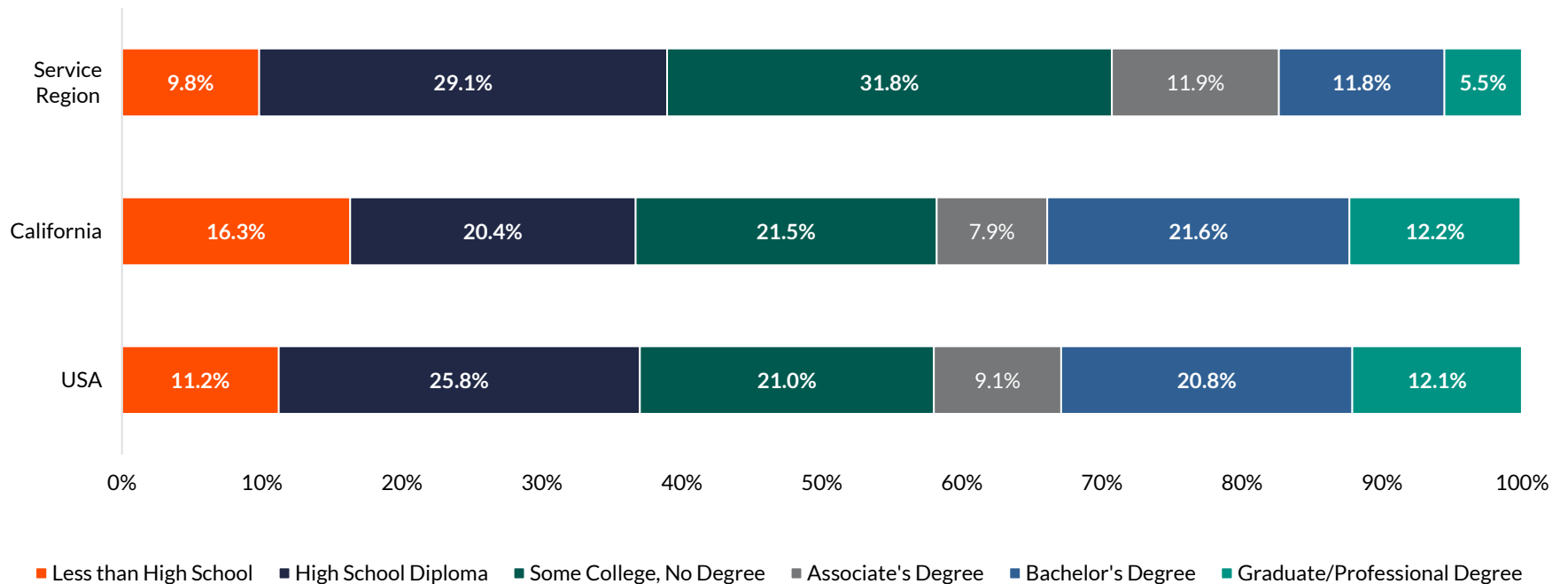
Region	Labor Force Participation, Age 16+
Service Region	48.1%
California	63.4%
USA	63.2%

Region	Poverty Rate
Service Region	12.5%
California	14.3%
USA	14.1%

EDUCATIONAL ATTAINMENT BY GEOGRAPHY

- Residents of the service area have higher rates of residents who have earned a high school diploma, “some college” attainment, and an associate’s degree than the California or national averages. The comparatively large share of “some college, no degree” attainment (31.8 percent) indicates potential demand for degree completion programs that would allow individuals to earn an associate’s degree. In contrast, the rates of residents who have earned a bachelor’s or postgraduate degree is considerably lower in the service region than in California or the nation. Of all residents in Calaveras and Tuolumne Counties between the ages of 25 and 64, 11.8 percent have earned a bachelor’s degree (compare to 21.6 percent in California) and 5.5 percent have earned a postgraduate degree (compare to 12.2 percent in California).

EDUCATIONAL ATTAINMENT



Source: [JobsEQ](#)

SERVICE REGION LABOR MARKET PROJECTIONS AND TRENDS

- Industry Report
- Occupational Projections
- Recent Job Posting Trends
- Skills and Certifications Analysis

SERVICE REGION INDUSTRY EMPLOYMENT TRENDS

- Health care and social assistance dominates by employment volume and is expected to see moderate employment growth. Other important industries with modest annualized employment growth predicted through 2025 include accommodation and food services, construction, and professional, scientific, and technical services.

TOP BROAD INDUSTRIES BY EMPLOYMENT VOLUME (Q2 2020)

Industries (two-digit NAICS codes) by total employment in the service area. Current employment and total five-year projected employment demand due to exits, transfers, and growth are shown via blue and red bar graphs. Location Quotient (LQ) values, 5-year historical, and 5-year projected annualized growth are heat-mapped red-to-green, with darker shades of green indicating stronger values. An LQ of 1.0 indicates parity with the national average share of the industry in question, while higher values indicate greater importance to the region.

Industry	Current			5-Year History		5-Year Forecast				
	Empl	Avg Ann Wages	LQ	Empl Change	Ann % Growth	Total Demand	Exits	Transfers	Empl Growth	Ann % Growth
Health Care and Social Assistance	4,966	\$50,767	1.14	329	1.4%	2,619	1,173	1,213	232	0.9%
Public Administration	3,760	\$58,986	2.61	320	1.8%	1,597	720	979	-101	-0.5%
Retail Trade	3,701	\$31,974	1.21	-57	-0.3%	2,292	1,072	1,354	-134	-0.7%
Accommodation and Food Services	2,806	\$23,259	1.12	-239	-1.6%	2,330	1,011	1,273	46	0.3%
Construction	2,520	\$55,335	1.45	528	4.8%	1,298	447	799	52	0.4%
Arts, Entertainment, and Recreation	1,958	\$32,363	3.52	80	0.8%	1,228	598	739	-109	-1.1%
Educational Services	1,807	\$45,536	0.74	-167	-1.8%	814	399	431	-17	-0.2%
Manufacturing	1,345	\$48,392	0.55	51	0.8%	639	254	434	-49	-0.7%
Administrative and Support and Waste Management and Remediation Services	1,250	\$39,290	0.66	379	7.5%	724	305	416	3	0.0%
Other Services (except Public Administration)	1,214	\$27,332	0.92	-226	-3.4%	663	312	373	-22	-0.4%
Professional, Scientific, and Technical Services	1,037	\$56,823	0.50	24	0.5%	459	165	280	14	0.3%
Agriculture, Forestry, Fishing and Hunting	856	\$38,910	2.12	139	3.6%	439	195	263	-19	-0.5%
Transportation and Warehousing	562	\$52,646	0.40	11	0.4%	277	125	169	-18	-0.6%
Real Estate and Rental and Leasing	481	\$41,570	0.92	30	1.3%	241	110	132	-1	-0.1%
Finance and Insurance	436	\$48,089	0.36	-17	-0.8%	195	76	125	-6	-0.3%
Utilities	381	\$114,365	2.44	-12	-0.6%	147	61	107	-20	-1.1%
Wholesale Trade	362	\$66,182	0.32	31	1.8%	172	70	116	-14	-0.8%
Information	285	\$50,798	0.48	-122	-6.9%	104	47	84	-27	-2.0%
Mining, Quarrying, and Oil and Gas Extraction	84	\$76,802	0.68	13	3.4%	41	14	29	-2	-0.4%
Management of Companies and Enterprises	79	\$74,995	0.17	4	1.0%	35	13	22	-1	-0.2%
Total - All Industries	29,892	\$44,121	1.00	1,006	0.7%	16,043	6,933	9,288	-177	-0.1%

Source: [JobsEQ](#), data reflect Q2 2020



SERVICE REGION TOP DETAILED INDUSTRIES

TOP INDUSTRIES BY PROJECTED DEMAND

Detailed industries (six-digit NAICS codes) by projected total employment demand from 2020 to 2025. Demand stems from industry growth (adding new workers), transfers (movement between industries), and exits (retirements).



Source: [JobsEQ](#)



INDUSTRY EMPLOYMENT ANALYSIS

Employment demand is expected to be highest in the human services industries. Employment in services for the elderly and persons with disabilities is expected to witness an annualized growth of 3.0 percent to 2025, resulting in a total demand of 759 positions. The field offers, however, the lowest compensation of any top-25 industry at just \$14,617 per year. Relatedly, health care care positions in general medical and surgical hospitals are projected to generate a total demand of 568 positions, though their annualized growth rate lies at -0.4 percent over the next five years.

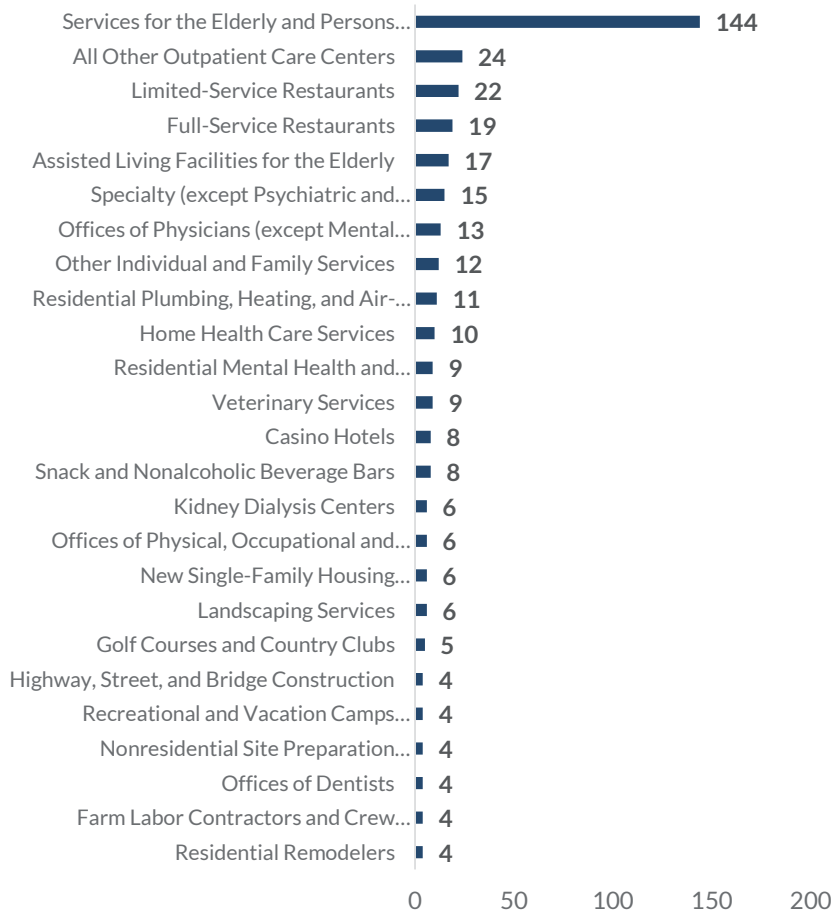
Employment in K-12 education will likely see declining demand. While elementary and secondary schools have the highest volume of current employment (nearly 1,600 positions), the employment over the next five years is expected to decline at an annualized rate of -0.1 percent. The current average annual wage lies at \$47,241.

Programs targeting workers in technical occupations may be a viable strategy for the consortium. Industries, such as landscaping, residential plumbing, heating, and air conditioning have a relatively low employment volume but indicate steady growth rates and average annual wages in the lower to mid-40s. Employment for residential plumbing, heating, and air-conditioning contractors is projected to grow at an annualized rate of 0.8 percent, whereas employment in landscaping services will grow annually at a rate of 0.4 percent. MJC's offerings in [Environmental Horticulture Science](#) and [HVAC/R Technician](#) may be particularly attractive to residents seeking training for career opportunities in the local workforce.

SERVICE REGION HIGH-GROWTH DETAILED INDUSTRIES

TOP INDUSTRIES BY PROJECTED GROWTH

Detailed industries (six-digit NAICS codes) by projected total employment demand growth from 2020 to 2025. Demand shown here stems only from industry growth, rather than the need to replace workers who transfer to other industries or exit the workforce.



Source: [JobsEQ](#)

INDUSTRY EMPLOYMENT ANALYSIS

When industries are ranked solely by projected five-year employment demand growth the largest industry by position volume is services for the elderly and persons with disabilities. Other human services and health care-related fields also rank in the top 25. These include assisted living facilities for the elderly (ranked at fifth position), specialty hospitals (sixth), offices of physicians (seventh), and home health care services (tenth).

Other health fields and veterinary medicine are also growth areas within the college's service region. Demand for workers in veterinary services and especially residential mental health and substance abuse facilities will grow over the next five years. Based on current projections, the employment in veterinary services will grow at an annualized rate of 1.1 percent, generating a total demand of 97 positions. The employment in residential mental health and substance abuse facilities is expected to grow annually at a rate of 2.2 percent, generating a total demand of 55 positions.

The transportation and construction sector is a further driver of moderate growth. Employment in new single-family house construction, landscaping services, highway, street and bridge construction, and residential remodelers is expected to grow annually at rates between 0.3 percent and 0.7 percent, generating a total demand of 500 positions through 2025.



SERVICE REGION OCCUPATIONAL PROJECTIONS

- Among occupations requiring postsecondary education at the associate's level or below, the fields most in danger of an undersupply of workers in the service region are medical assistants, LPNs, firefighters, respiratory therapists, and nursing assistants. There is likely also a shortage of heating, air conditioning, and refrigeration mechanics and installers, as well as veterinary technologists and technicians.

TOP REGIONAL OCCUPATIONS

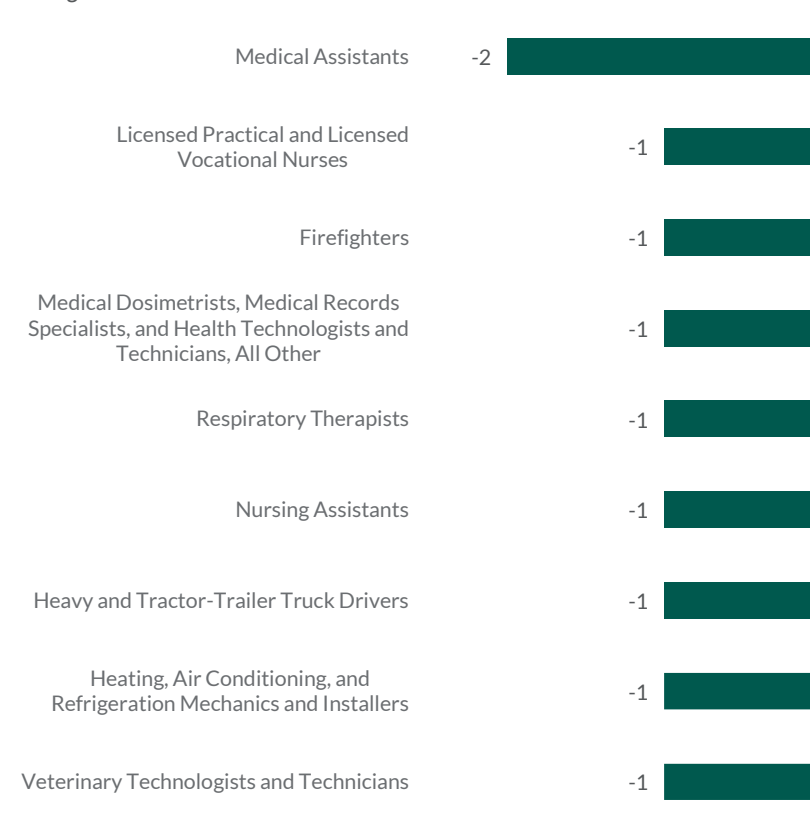
Occupations requiring an associate's degree or certificate. Darker shades of green indicate stronger values. For the growth and unemployment analyses, weaker values are shaded in red.

Occupation	Total Empl.	Avg. Annual Wages	Forecast Annual Growth	Q2 2020 Unempl. Rate	Typical Entry-Level Education
Nursing Assistants	266	\$35,900	0.0%	5.5%	Non-degree award
Heavy and Tractor-Trailer Truck Drivers	209	\$45,400	-0.1%	6.3%	Non-degree award
Automotive Service Technicians and Mechanics	156	\$45,500	-0.8%	5.5%	Non-degree award
Licensed Practical and Licensed Vocational Nurses	150	\$60,800	-0.1%	3.0%	Some college, no degree
Medical Assistants	147	\$40,900	1.4%	3.1%	Some college, no degree
Firefighters	122	\$48,100	-0.1%	1.5%	Some college, no degree
Hairdressers, Hairstylists, and Cosmetologists	112	\$31,400	0.1%	8.3%	Non-degree award
Dental Assistants	87	\$47,400	0.5%	3.5%	Some college, no degree
Heating, Air Conditioning, and Refrigeration Mechanics and Installers	87	\$52,200	0.5%	4.3%	Non-degree award
Preschool Teachers, Except Special Education*	74	\$28,600	0.1%	7.6%	Some college, no degree
Medical Dosimetrists, Medical Records Specialists, and Health Technologists and Technicians, All Other*	71	\$53,000	0.5%	3.2%	Some college, no degree
Emergency Medical Technicians	43	\$40,400	-0.1%	1.9%	Some college, no degree
Respiratory Therapists	43	\$82,400	1.3%	1.5%	Associate's degree
Dental Hygienists	42	\$99,900	0.4%	1.1%	Associate's degree
Veterinary Technologists and Technicians	40	\$38,700	1.3%	5.4%	Associate's degree

*A higher percentage of workers hold a bachelor's degree in this occupation but it also falls into top 15 occupations for those with some college, no degree. Source: [JobsEQ](#)

ANNUAL SHORTAGE

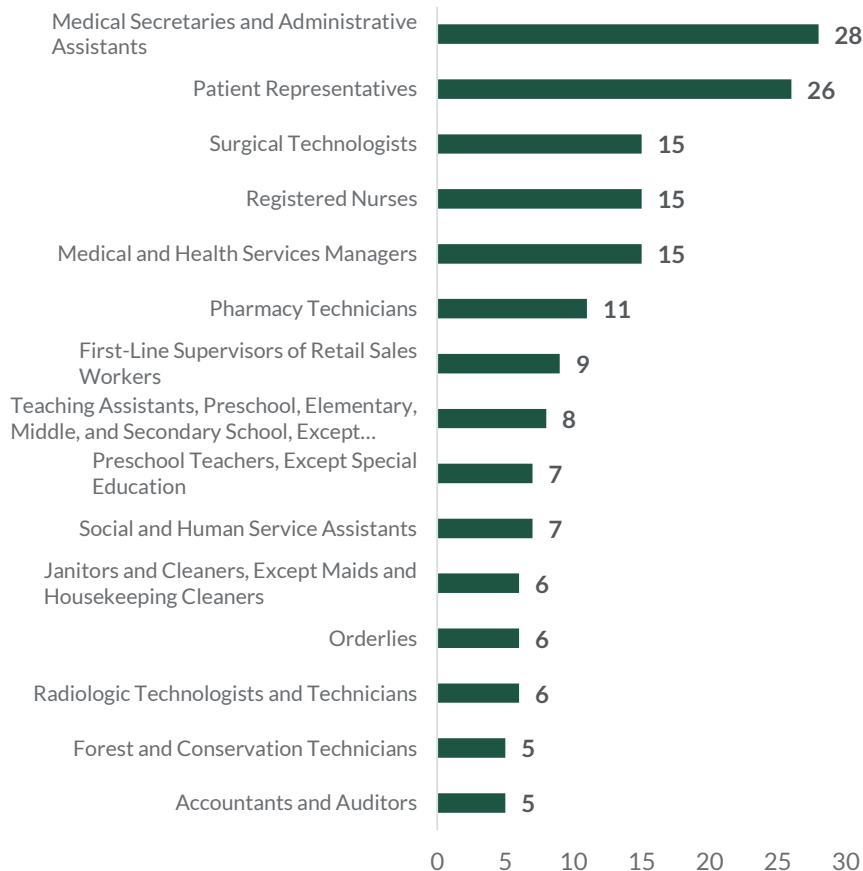
Occupations requiring an associate's degree or certificate with the largest annual projected annual shortages (green, negative numbers) of workers in the service region through 2030.



SERVICE REGION JOB POSTINGS ANALYSIS

TOP OCCUPATIONS BY AD VOLUME

Based on an analysis of job postings within the two-county service area that require an associate's degree, certificate, or license. The search includes all postings from the past 12 months as of December 2020.



Source: [JobsEQ](#)

JOB POSTINGS ANALYSIS

The most promising occupations at the certificate, license, and associate's levels are within the health care sector. Openings for health care professionals are especially numerous, with lower-level medical and health services management roles, medical secretaries, patient representatives, registered nurses, surgical technologist roles, and pharmacy technicians among the top six positions by volume. The total number of relevant job postings in the past year is 110, though a substantial share of postings do not specify educational requirements.

The number of postings indicate demand for teaching and social and human services assistants, as well as preschool teachers. Over the past twelve months (as of December 2020), a total of 22 job listings were posted for teaching assistants (preschool, elementary, middle, and secondary school, except special education) and social and human service assistants. Moreover, educational institutions (e.g., Safari Learning Academy) posted seven listings for preschool teachers.

There is moderate labor demand for forest and conservation technicians, as well as accountants and auditors. Over the past year, five listings were posted for forest and conservations technicians and five vacancies were published for accountants and auditors.

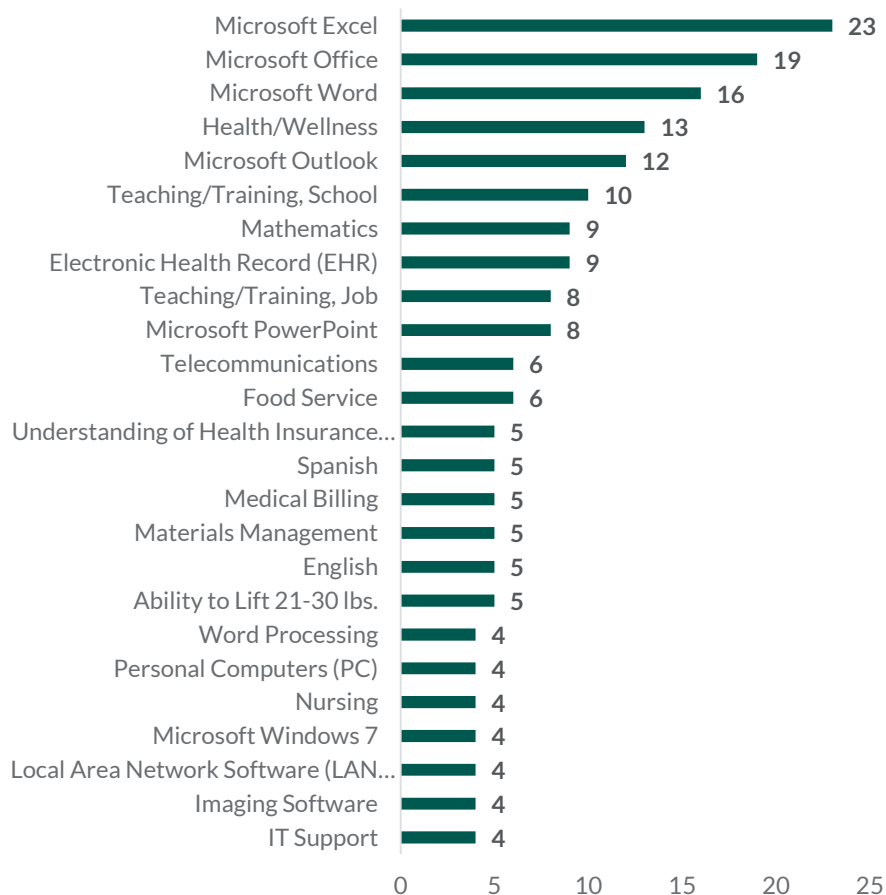
METHODOLOGY NOTE

JobsEQ's [Real Time Intelligence](#) tool consolidates job postings from over 15,000 sources and analyzes them using a proprietary machine learning algorithm that matches postings to job locations and assigns them to BLS occupational categories by comparing posting texts with O*Net occupational descriptions.

SERVICE REGION JOB POSTINGS ANALYSIS, CONTINUED

TOP HARD SKILLS BY AD VOLUME

Based on an analysis of job postings within the two-county service area that require a certificate, license, or associate's degree. The search includes all postings from the past 12 months as of December 2020.



Source: [JobsEQ](#)

HARD AND SOFT SKILLS ANALYSIS

Microsoft Office Suite skills dominate the hard skills request rankings, followed by health care and wellness, teaching/training, and mathematics. Relevant for health care-related occupations are skills, such as electronic health record, understanding of the health insurance portability and accountability Act (HIPAA), and medical billing.

The skills matrix among regional job postings confirms findings from the preceding analyses, which have also shown the prevalence of health and wellness and education-related positions below the associate's level. While health care, education, and social services are important potential growth areas, many of the technology-focused Microsoft Office hard skills requested by recent job postings are broadly applicable to many fields and tasks.

Among soft skills (not shown in the graph), the most sought-after attributes include clerical skills, accountability/responsibility, and written and verbal communication, followed by customer service and supervision/management:

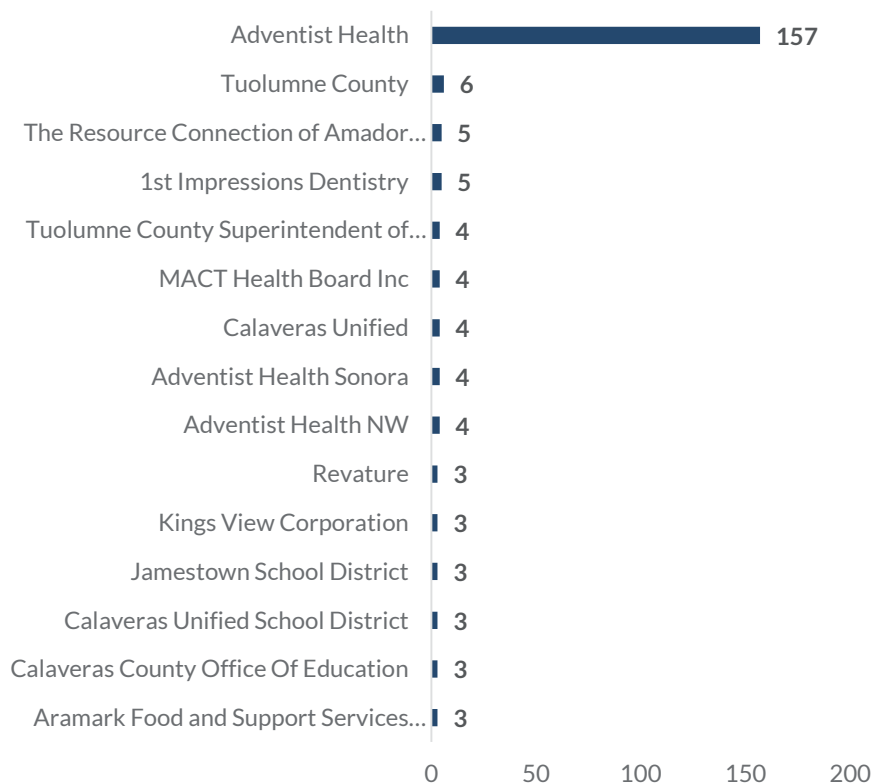
- Clerical (68 ads)
- Accountable/Responsible/Reliable/Dependable Trustworthy (61 ads)
- Communication (Verbal and written skills) (57 ads)
- Customer Service (34 ads)
- Supervision/Management (31 ads)
- Cooperative/Team Player (27 ads)

SERVICE REGION JOB POSTINGS ANALYSIS, CONTINUED

- The region's most important employers by ad volume are health care providers, while the most commonly-requested job postings are in health care and retail support. This data sample includes a total of 302 postings from 83 employers.

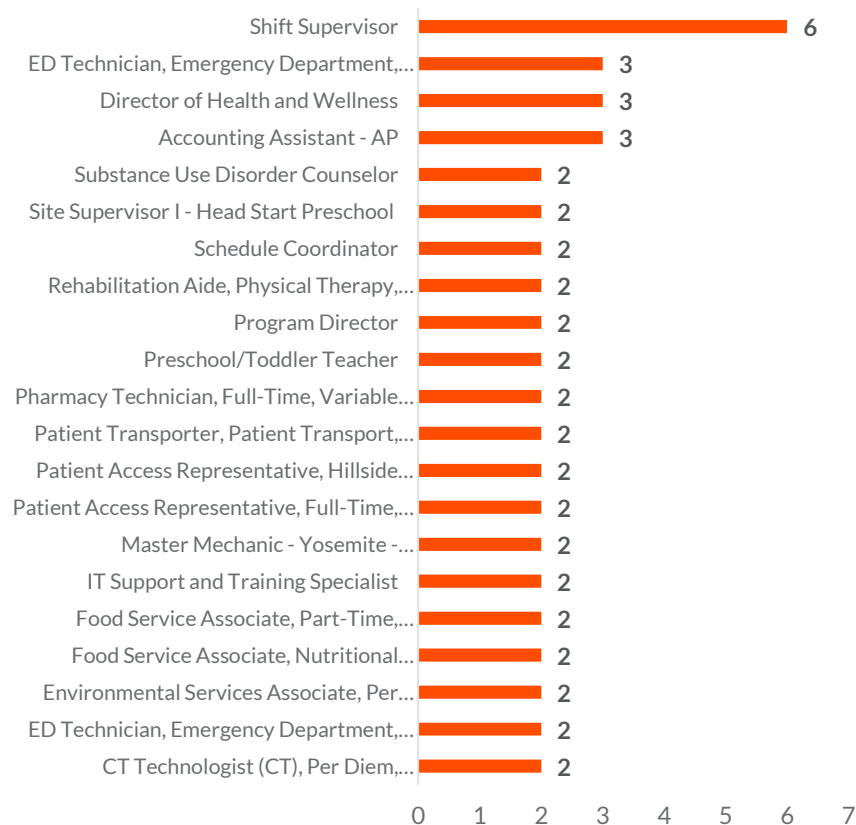
TOP EMPLOYERS BY AD VOLUME

Based on an analysis of job postings within the two-county service area that require a certificate, license, or associate's degree. The search includes all postings from the past 12 months as of December 2020.



TOP JOB TITLES BY AD VOLUME

Based on an analysis of job postings within the two-county service area that require a certificate, license, or associate's degree. The search includes all postings from the past 12 months as of December 2020. Graph includes all position titles with at least two ads.



Source: [JobsEQ](#)

SERVICE REGION JOB POSTINGS ANALYSIS, CONTINUED

CERTIFICATIONS BY VOLUME

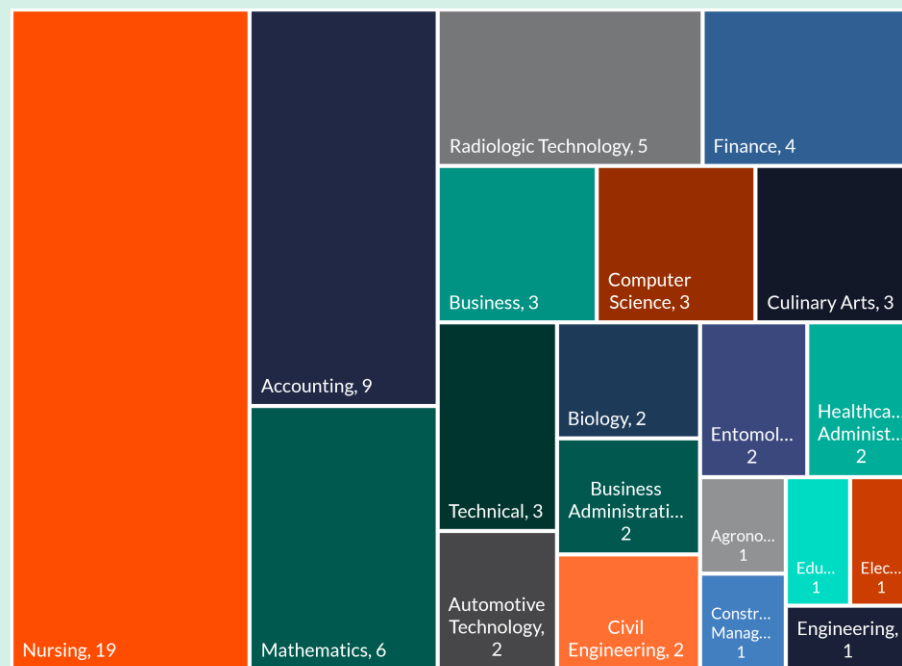
Based on an analysis of job postings within the two-county service area that require an associate's degree, certificate, or license. The search includes all postings from the past 12 months as of December 2020.



CERTIFICATIONS AND EDUCATIONAL PROGRAM ANALYSIS

For workers with some postsecondary education up to an associate's degree, the professional certifications most commonly sought by employers are concentrated in health care fields. Credentials in ServSafe Food Protection are also among the top-20 most-requested certifications.

Nursing, accounting, mathematics, and radiologic technology-focused degrees are the fields of study most commonly sought among ads seeking workers at the associate's level and below. Finance, business, and computer science degrees are also widely requested.



Source: [JobsEQ](#)



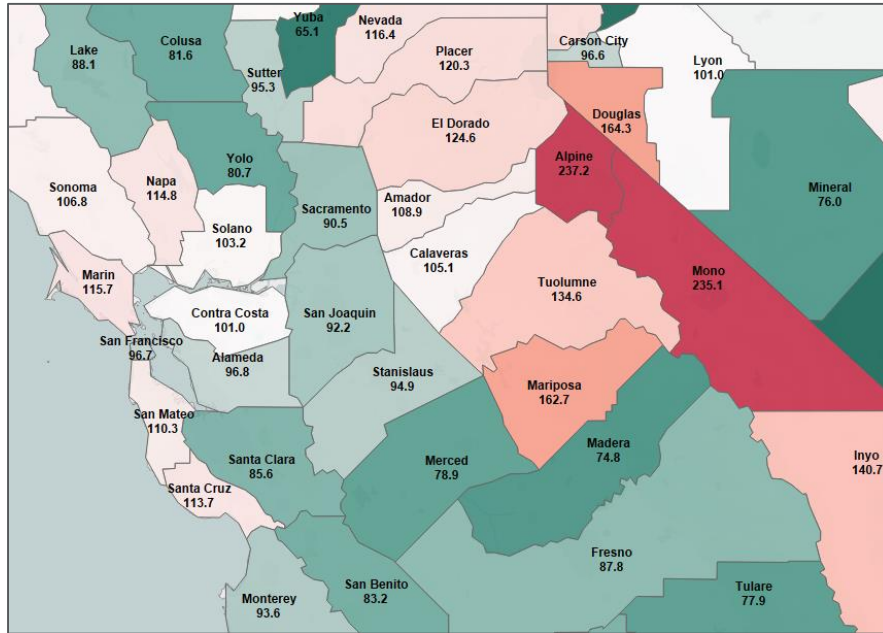
COVID-19 IMPACTS

- Service Region Projected Impacts
- Economic Vulnerability of Industries
- Workforce Impacts

SERVICE REGION ECONOMIC IMPACT PROJECTIONS

REGIONAL COVID VULNERABILITY INDEX

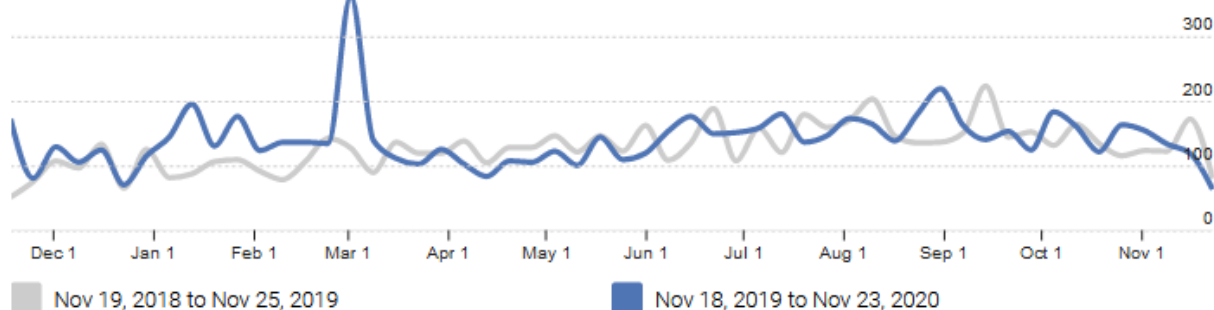
Higher scores (denoted by darker shades of red) indicate greater economic vulnerability to COVID-19. The national average score is 100. A value of 200 indicates an impact twice as severe as the average. An impact of 50 indicates is only half as severe.



VULNERABILITY INDEX ANALYSIS

- Economic predictions by Chmura Economics & Analytics suggest that the immediate service region, composed of Calaveras and Tuolumne Counties, will see average-to-moderate economic impacts compared to the nation at large.** Above-average impacts are predicted for Tuolumne County (134.6), with near-average impacts for Calaveras County (105.1).
- The Chmura impact model is based on the mix of industries employing workers in each county.** Harder-hit counties are more likely to have economies that depend more heavily on accommodation and food services, arts, entertainment, and recreation, services, transportation and warehousing, retail and wholesale trade, and information services than the national average.
- The number of associate's, certificate, and license-level positions advertised online for the service area matched the 2019 trend until early March.** Since then, the number of postings collapsed and has yet to recover. The decline in job postings at these education levels occurring since mid-August of 2020 is especially steep.

NEW JOB POSTINGS BY DATE - CALAVERAS AND TUOLUMNE COUNTIES, 2019 (GRAY) VS. 2020 (BLUE)



Source: [Chmura Economics & Analytics](#); Data are based on April 15, 2020 data and forecasts using BLS industry employment data.

INDUSTRY ECONOMIC IMPACT PROJECTIONS

EMPLOYMENT IMPACTS BY INDUSTRY

Projected impacts on industry employment compared to Q4 2019 baseline data.

NAICs Broad Industry	Projected COVID-19 Workforce Losses
Accommodation and Food Services	> 60%
Arts, Entertainment, and Recreation	> 60%
Other Services (except Public Administration)	10-25%
Transportation and Warehousing	10-25%
Retail Trade	10-25%
Wholesale Trade	10-25%
Information	10-25%
Manufacturing	5-10%
Construction	5-10%
Mining, Quarrying, and Oil and Gas Extraction	5-10%
Real Estate and Rental and Leasing	< 5%
Health Care and Social Assistance	< 5%
Finance and Insurance	< 5%
Educational Services	< 5%
Administrative and Support and Waste Management and Remediation Services	< 5%
Agriculture, Forestry, Fishing and Hunting	< 5%
Public Administration	< 5%
Professional, Scientific, and Technical Services	< 5%
Management of Companies and Enterprises	< 5%
Utilities	< 5%
Active Military	< 5%

Source: [Chmura Economics & Analytics](#); Predictions are based on April 15, 2020 data and forecasts using BLS industry employment data.

INDUSTRY IMPACT ANALYSIS

Based on its [analysis](#) of primary research, expert testimony, industry news, preliminary unemployment reports, and job postings data, Chmura Economics & Analytics expects employment losses to be particularly severe in accommodation and food services, as well as arts, entertainment, and recreation. Their model predicts unemployment rates exceeding 60 percent of the pre-COVID workforce in those industries.

The finance, real estate, education, health care, public administration, and professional and managerial services industries are projected to be best positioned to weather the COVID-19 economic fallout. Chmura expects that they will not lose more than five percent of their total Q4 2019 workforces as a result of the pandemic.

A similar analysis by McKinsey & Company [estimates](#) that “up to 57 million US jobs are now vulnerable, including more white-collar jobs.” Their findings concur with the Chmura analysis in naming accommodation and food services as the most at-risk industries. Community services and health professional roles are the least vulnerable positions according to their research.

METHODOLOGY NOTE

Like the Chmura Vulnerability Index, the McKinsey estimates were most recently updated in April 2020. Note that while the Chmura industry employment estimates focus on predicted job losses, the generally higher McKinsey estimates look at the share of workers in each industry that are vulnerable to job losses.

INDUSTRY ECONOMIC IMPACT PROJECTIONS, CONTINUED

EMPLOYMENT IMPACTS BY INDUSTRY

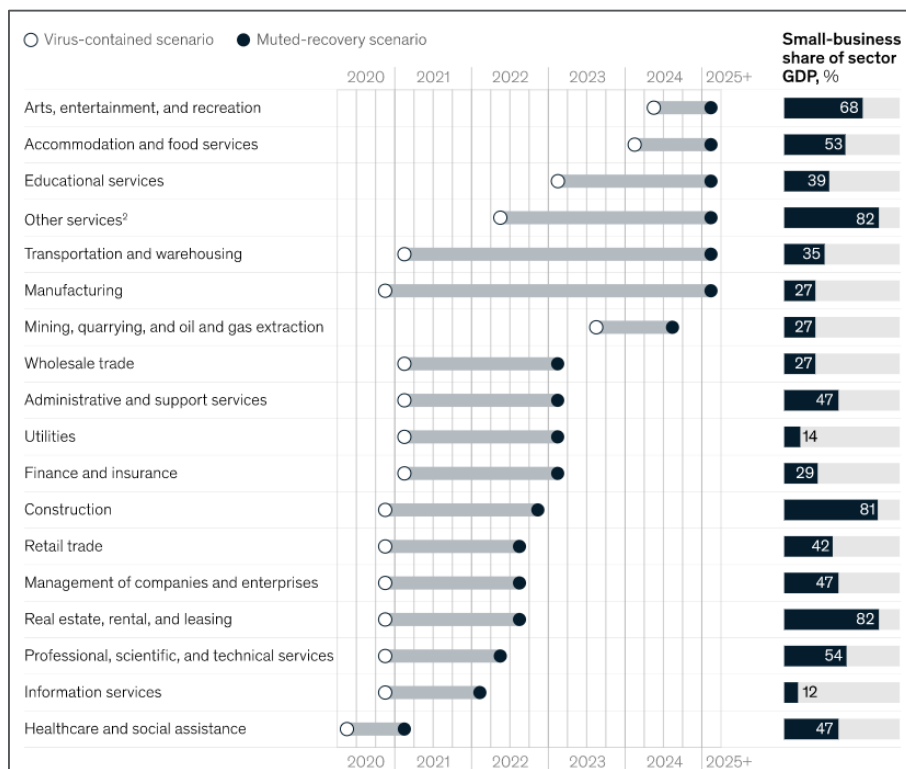
Projected impacts on industry employment compared to Q4 2019 baseline data.

Industry	Share of Jobs at Risk	Number of Positions
Public Administration	4%	22,343,687
Health Care and Social Assistance	19%	20,528,600
Retail Trade	51%	15,374,245
Accommodation and Food Services	92%	14,096,184
Manufacturing	42%	12,260,240
Professional, Scientific, and Technical Services	29%	9,397,413
Administrative and Support and Waste Management and Remediation Services	43%	9,192,528
Construction	49%	7,640,313
Finance and Insurance	27%	6,010,077
Wholesale Trade	39%	5,770,175
Transportation and Warehousing	38%	5,531,248
Educational Services	33%	3,560,157
Information	30%	2,752,212
Arts, Entertainment, and Recreation	89%	2,429,910
Management of Companies and Enterprises	31%	2,349,620
Real Estate and Rental and Leasing	50%	2,263,892
Personal and Laundry Services	74%	2,004,254
Religious and Civic	41%	1,951,569
Repair and Maintenance	36%	1,753,207
Mining, Quarrying, and Oil and Gas Extraction	59%	666,169
Utilities	39%	566,204
Agriculture, Forestry, Fishing and Hunting	38%	49,086

Source: [McKinsey & Company](#), April 2020.

ESTIMATED RECOVERY TIME BY INDUSTRY

McKinsey & Company have estimated the time it will take for major industry clusters to recover to their pre-COVID levels of GDP contribution. These time horizons are shown below and include both an optimistic (“virus contained”) and pessimistic (“muted recovery”) scenario. As indicated, projections are worst for the arts, entertainment, and recreation and accommodation and food services industries:



Source: Figure reproduces content from [McKinsey & Company](#), July 2020.



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