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STATE OF THE WORKFORCE

2021 Labor Market Snapshot of New York

Prepared by the New York State Association of Training and Employment Professionals
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Registered 501c3 non-profit

NYATEP

Voice - Knowledge - Progress
For Workforce Development

Launched in the late 1970s, NYATEP was founded by a small group of professionals dedicated to collaborating to increase the effectiveness of federally funded workforce programs. In the last 40 years, the organization has grown to be New York's statewide workforce development association. NYATEP is a membership based, 501c3 non-profit, intermediary that provides leadership, vision, and advocacy for a thriving workforce development network across New York State. Our members help more than a million New Yorkers achieve good or better jobs through job training, education, economic and workforce development.

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A special thank you to our data partners and sources



QUESTIONS RAISED BY THIS BRIEF:

How can the City and State proactively align policies to ensure an equitable post-pandemic economic recovery for New Yorkers?

Where do the City and State need to connect economic development priorities and investments to support New York's industries decimated due to the COVID 19 pandemic?

What City and State policies can be enacted to expand and align quality job training opportunities for New Yorkers?

How can the City and State proactively align economic and workforce agendas to recruit good jobs for New Yorkers?

How is the City and State tracking and measuring resources and programs related to credential transparency to better understand what is readily available to New Yorkers and what is necessary to invest in?

Executive Summary

About the report

The State of the Workforce Brief is an annual snapshot, of publicly available data, to inform communities about the dynamics of their regional economy and the workforce impact. For the fourth year, the New York Association of Training & Employment Professionals used readily available data to understand who is working and who isn't, what sectors and occupations are growing across the State, and the number of potential workers produced by New York's education and training systems.

KEY FINDINGS FOR NEW YORK STATE

COVID dramatically altered the labor market and New York City bore the brunt of the impact

- In just one week at the height of the pandemic, New York State experienced an unprecedented 16% unemployment rate, with some communities hitting above 20%, and nearly 400,000 New Yorkers applying for unemployment insurance.
- New York City lost 933,000 jobs in just two months, representing one in every five jobs. Recovery continues to be extremely sluggish as only 48% of lost jobs were regained by September 2021.
- Large sectors including Leisure and Hospitality, Accommodations and Food Services and Retail were hit hard and still slow to recover. Overall, there are 2.8 million less jobs in New York than pre-pandemic.
- In September 2021 there were 543,000 job openings in New York State, however New Yorkers are dropping out of the labor market. As of August 2021, it was 2.9% - a jump from 2.3% in 2019, the highest it has been since prior to 2002; as concerns remain about COVID; childcare and working conditions are at the forefront.
- Women, young adults and Black and Hispanics/Latinx workers continue to face higher unemployment rates than the overall State averages.

New Yorkers were buoyed by federal assistance and the Excluded Worker Fund

- Over 4.7M New Yorkers received State unemployment benefits totaling more than \$97B. Additionally, Federal funding provided a financial buffer for 1.2M New Yorkers through Pandemic Unemployment Insurance, 600K through Pandemic Unemployment Compensation and 537K through Pandemic Emergency Employment Compensation.
- The newly launched Excluded Worker Fund has provided compensation to thousands of workers who were left out of expanded benefits, with more than \$768M paid out in New York City alone.

Government investments have led to growth in new industries including clean energy and cannabis

- While New York saw a 9.6% decline in clean energy sector jobs during the pandemic, it was less than the nationwide loss of 14% and the industry has already rebounded with 5K jobs since August 2020.
- Recent legislation to legalize adult use cannabis is projected to generate upwards of \$1.3B and provide 40,000 jobs in cultivation, manufacturing, and retail/dispensaries.

To truly recover, more New Yorkers need skills in demand

- Of the ten largest occupations statewide, accounting for 6.5M jobs, only one occupation requires a high school diploma/equivalency or less, and even at a median pay grade, only four occupations exceed New York's 2021-2022 Income Guideline poverty level of \$49,025.
- Approximately 38.2% (5.22M) of New Yorkers 25 years or older have a high school diploma/equivalency or less and 796K never even entered the 9th grade.
- Of the 24% of New Yorkers who have some college or an Associate's Degree, 2.1M New Yorkers, have some college credits but no degree.

New York's Economic Landscape

7.5M

total jobs in New York;
2.8 million less than
reported in 2019

933K

jobs New York City lost in
two months during the
pandemic

2.9%

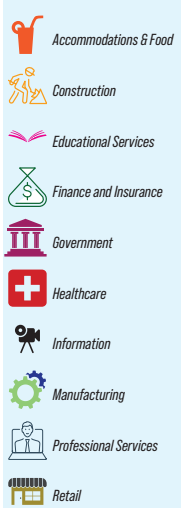
New Yorkers quitting jobs
or choosing to drop out
of the workforce

In October 2021, the national total nonfarm payroll employment rose by 531,000, and the unemployment rate edged down to 4.6%¹. As reported in September 2021, there are a total of 7.5M jobs in New York, of which 5.4M jobs are within the top sectors: Professional Services, Educational Services, Transportation, Healthcare, Accommodations and Food, Production Occupations / Manufacturing and Retail². This is 2.8M less jobs reported in 2019.

In NYC, after devastating job losses at the beginning of the recent recession—933,000 jobs in just two months, representing one of every five jobs across the five boroughs—the latest data shows the recovery continues to be extremely sluggish as only 48% of lost jobs were regained by September 2021. Leisure and hospitality have regained only 146,000 jobs and

TOP 5 SECTORS BY REGION⁵

Capital Region					
Central NY					
Finger Lakes					
Hudson Valley					
Long Island					
Mohawk Valley					
New York City					
North Country					
Southern Tier					
Western NY					
Statewide					



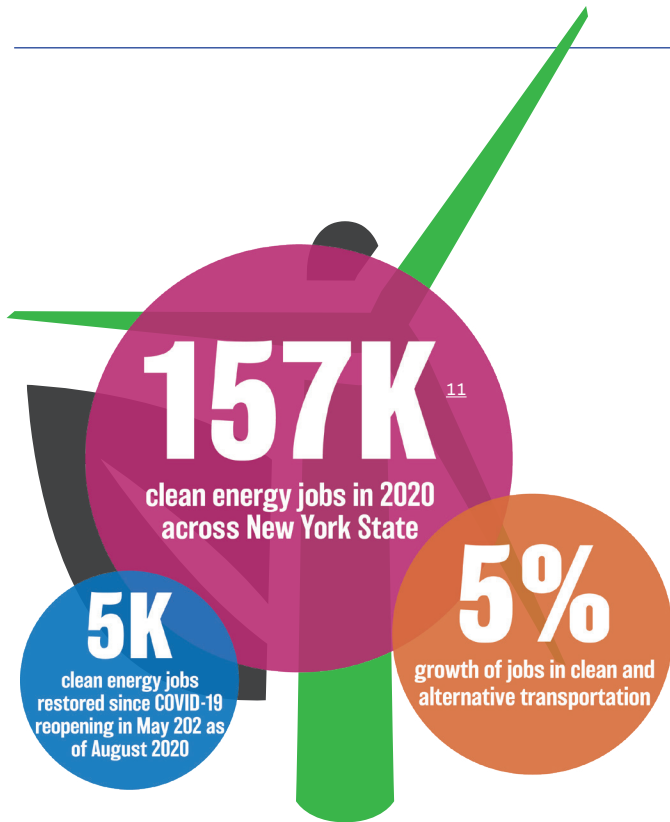
CHANGE IN JOBS BY SECTOR⁴

Leisure & Hospitality	+117,000
Professional & Business Services	+52,400
Educational & Health Services*	+43,500
Trade, Transportation & Utilities	+33,400
Information	+20,100
Manufacturing	+13,900
Other Services	+9,700
National Resources & Mining	+400
Construction	-9,600
Financial Activities	-14,600
Government*	-41,300

*Educational and health services is in the private sector. Government includes public education and public health services.

remain 163,700 jobs below the pre-recession peak. Education and Healthcare have slowly recovered two-thirds of the lost jobs, faring better than other sectors³.

As e-commerce continues to grow, the need for warehouse space and workers to manage the logistics is expected to remain high. According to JLL Research's U.S. Industrial Tenant Demand Study, demand for industrial space in the U.S. was up by 22% in 2021. It rose most sharply in the logistics and parcel delivery industry, followed by e-commerce, traditional retailers and food and beverage⁶. The American Trucking Associations estimates that in 2021 the truck driver shortage will hit a historic high of just over 80,000 drivers and at current trends, the shortage could surpass 160,000 in 2030⁷.



Another trend that has reshaped the labor market, coined “the great resignation”, are the significant number of job vacancies and the number of people who are quitting or choosing to drop out of the workforce. As of August 2021, it was 2.9% - a jump from 2.3% in 2019, the highest it has been since prior to 2002. Worker expectations have shifted, including requiring increased flexibility, better pay and benefits, and improved working conditions⁸. Desire to be able to work from home is highest at the top of the corporate ladder, while 47% of non-management workers prefer to work in-person. And, 2 in 3 non-management workers still say they are more likely to work for a company that offers some work from home flexibility⁹.

Of the ten largest occupations statewide, accounting for 6.5M jobs, only Home Health and Personal Care Aides require a high school diploma or less, and even at a median pay grade, only Education, Training, and Library Occupations;

Business and Financial Operations; Healthcare Practitioners and Technical Occupations, and Management Occupations exceed New York’s 2021-2022 Income Guideline poverty level of \$49,025¹⁰. Several sectors were hard hit by COVID-19 including Health Care, Retail and Education, and as indicted in the change in jobs by sector chart, several are slower to recover post pandemic such as jobs in Financial Activities and Government.

10 LARGEST OCCUPATIONS STATEWIDE¹²

	# of Jobs	Entry Pay	Median Pay	Experienced Pay
Office and Administrative Support Occupations	1.2M	\$32K	\$45K	\$59K
Sales and Related Occupations	769K	\$28K	\$39K	\$83K
Education, Training, and Library Occupations	736K	\$34K	\$67K	\$100K
Business and Financial Operations Occupations	607K	\$54K	\$85K	\$123K
Healthcare Support Occupations	600K	\$29K	\$33K	\$39K
Healthcare Practitioners and Technical Occupations	529K	\$49K	\$84K	\$122K
Transportation and Material Moving Occupations	529K	\$28K	\$38K	\$55K
Nursing, Psychiatric, and Home Health Aides *	525K	N/A	N/A	N/A
Management Occupations	524K	\$80K	\$147K	\$207K
Home Health & Personal Care Aides**	430K	\$28K	\$32K	\$36K

*Wage estimates that do not meet publication standards are labeled n/a.

**requires a high school diploma or less

2021-2022 Federal Income Guidelines identify New York's poverty level for a family of four at \$49,025¹³

Who is Working in New York

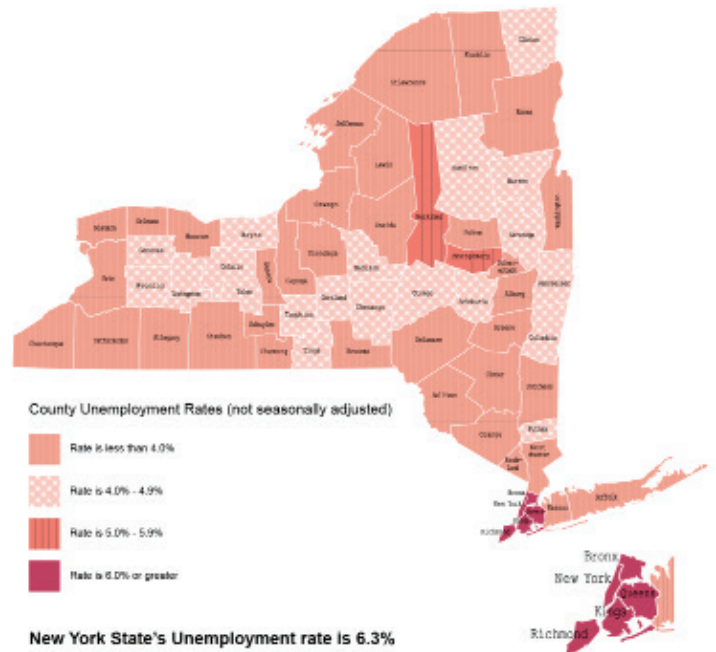
At the height of COVID, New York's unemployment rate was over 16%, and several counties hit over 20% nearing Depression-level rates. Just shy of 400,000 people made an initial employment claim during the week April 11, 2020, overloading the unemployment system. Governor Hochul shared in September 2021 that New York State, to date, has paid out more than \$97 billion in unemployment benefits during this pandemic to more than 4.7M New Yorkers¹³.

In September 2021, the statewide unemployment rate decreased from 7.4% to 7.1%. The number of unemployed New Yorkers decreased over the month by 27,200, from 690,700 in August to 663,500 in September 2021¹⁴. New York City's unemployment rate decreased over the month from 10.2% to 9.8%¹⁵.

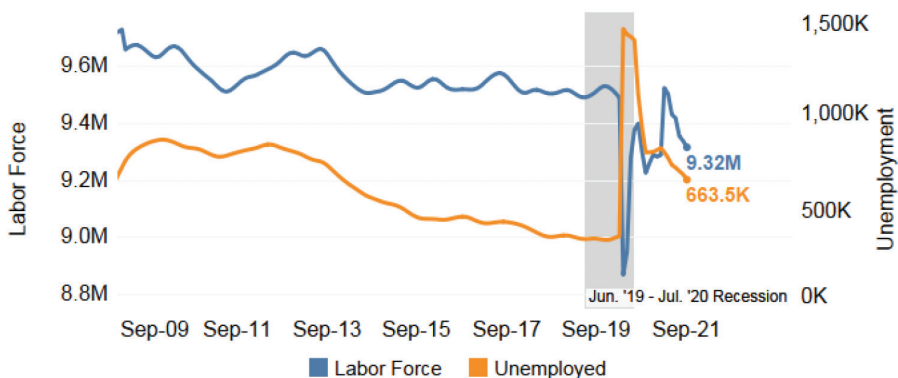
Many New Yorkers were extended a lifeline through several federal programs, including the Pandemic Unemployment Assistance (PUA), Pandemic Unemployment Compensation (PUC), and Pandemic Emergency Unemployment Compensation (PEUC). 2.4M New Yorkers claimed benefits during the week ending October 3, 2021, more than 10% of the nationwide total; 1.2M received PUA, more than 600,000 in PUC, and 537,000 received PEUC¹⁶.

Some have argued, while discounted by many economists, that the PUA and PEUC payments have had a negative impact. Despite an increase in working New Yorkers, not everyone who could be working is. The overall Labor Force Participation Rate in September 2021 was 61.69%, the lowest it has been (with the exception of June 2020) since before 2000. The previous rate from September 2019 was 63.13% (a 1.14% variance)¹⁷. While there has been a lot of focus on getting the economy back to normal, the data and trends before the COVID-19 pandemic demonstrate that normal has not worked for everyone. The economic loss of racial and gender disparities to our labor market is estimated to be \$2.6T dollars¹⁸.

UNEMPLOYMENT RATES BY COUNTY, NEW YORK STATE SEPT 2021¹⁹

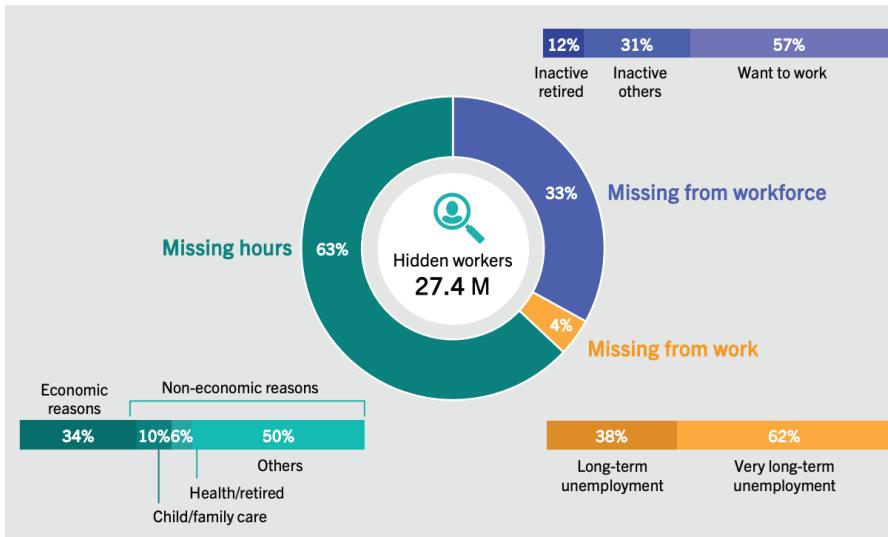


TOTAL NEW YORK LABOR FORCE & NUMBER OF UNEMPLOYED, JANUARY 2010 - SEPTEMBER 2021²⁰



Another indicator that this labor market is not back to normal is the number of discouraged workers who have stopped looking for employment or are working part-time involuntarily, also known as U-5. While the "reported" unemployment rate is around 7%, however the U-5 unemployment rate for New York is at 9.3% and in NYC it is 12.8%. If you include those working part time involuntarily it rises to over 13% for New York State and 17% in NYC²¹.

HIDDEN WORKERS IN THE U.S. WORKFORCE²³



In addition, the national youth unemployment rate is a critical indicator of economic stability. The youth unemployment rate, at 10.0% in July 2021, was down from 18.5% in July 2020 but remained higher than the July 2019 rate of 9.1%. The July 2021 unemployment rates for young men (10.9%), women (9.1%), Whites (8.9%), Blacks (13.6%), Asians (12.3%), and Hispanics/Latinx (11.7%) were all substantially lower than in the prior summer²².

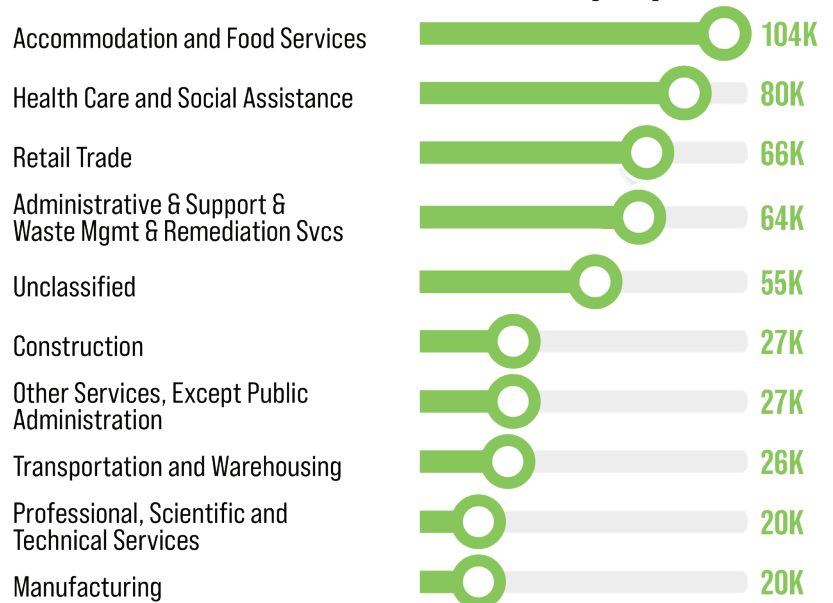
There are 27M “Hidden Workers” in the U.S. workforce. Hidden Workers are a highly diverse group of workers—ranging from those who are neither

in employment nor in education, to caregivers, to veterans, to those with disabilities—share one thing in common. They are widely excluded from consideration for employment by many employers. 63% are “missing hours,” 33% are “missing from the workforce,” and 4% are “missing from work.” Just under half (44%) of middle-skill “hidden workers” reported that finding work was just as hard pre-COVID-19 as it was during the 2020 survey period²⁴. Another group often overlooked are people with disabilities. The New York State Department of Labor reports that for the one-year period between April 2020 and March 2021, unemployment rates for people with disabilities averaged 16.2%, an increase of 8.9% over the prior year²⁵.

Lessons from past economic downturns show that Black and Hispanics/Latinx workers, and women are likely to experience greater job losses and recover wages and assets more slowly. Data from early 2021 indicated similar trends maybe happening in the COVID-19 recovery.

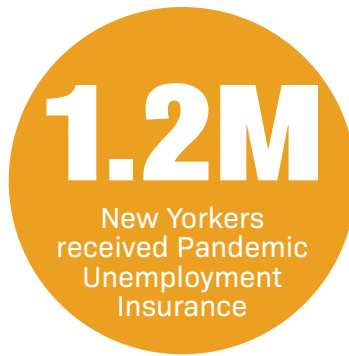
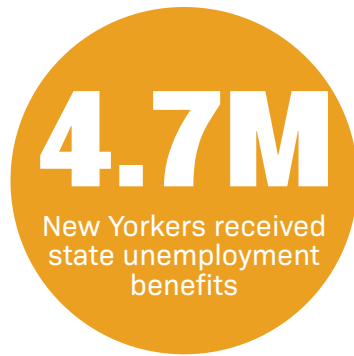
Since the pandemic’s onset, job losses among women have resulted directly from the disproportionate impact on female-dominated industries like leisure and hospitality, education, and healthcare. The National Women’s Law Center shared that although the Bureau of Labor Statistics (BLS) monthly jobs report shows that the economy gained 194,000 jobs in September 2021. Women experienced no net job gains, and actually went backward: while men gained 220,000 jobs in September, women lost 26,000 jobs. Shockingly, “it would take over 2 years of growth at September’s level to gain back the nearly 5M jobs the economy has lost since February 2020.”²⁶ Additionally, the Schuyler Center has reported that over the past year, more than 1,200 child care providers have closed permanently, pushing child care into a crisis leading to more women, in particular women of color, stepping out of employment to care for children²⁷.

STATEWIDE PEUC, EB AND REGULAR UNEMPLOYMENT INSURANCE EXHAUSTEES FOR WEEK 9/5/2021²⁸



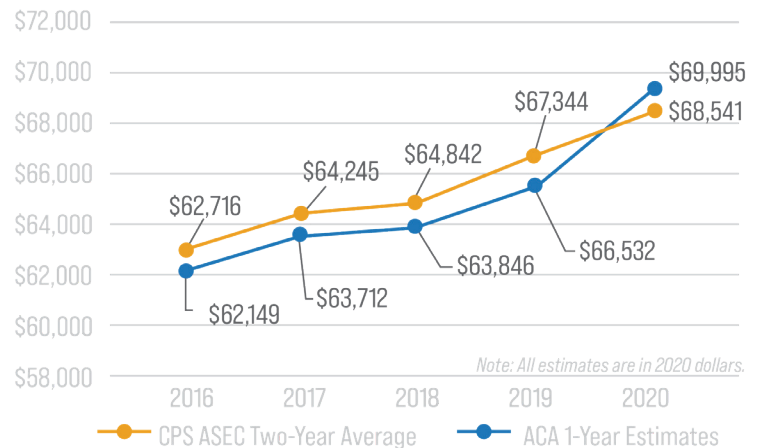
Pandemic Emergency Unemployment Compensation (PEUC), Extended Benefits (EB)

Pandemic Impact on New Yorkers



Even before COVID-19, 45% of New York households were considered to be working poor and just one emergency away from financial ruin, putting New York in a perilous situation as COVID-19 created mass layoffs and closures. The SHED survey shows that 1 in 5 households cannot afford an emergency cash expense of \$400²⁹. Based on the United Way's ALICE (Asset Limited, Income Constrained, Employed) Report in 2018, the Household Survival Budget in New York was \$27,312 for a single adult, \$30,408 for a single senior, and \$78,156 for a family of four in 2018 — significantly more than the Federal Poverty Level of \$12,140 for a single adult and \$25,100 for a family of four³⁰.

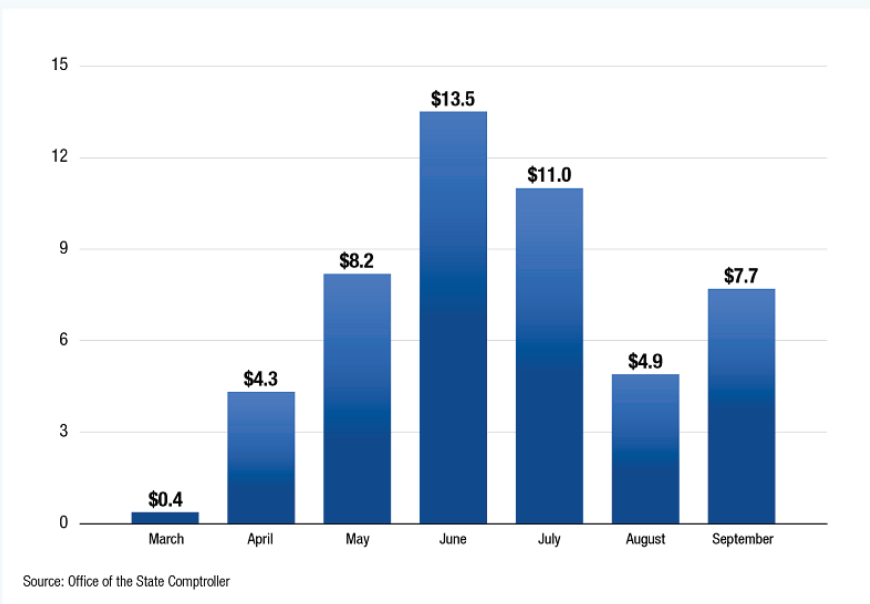
MEDIAN HOUSEHOLD INCOME: 2016 TO 2020³²



Unemployment Insurance Payments Approved

(Billions of Dollars)

35

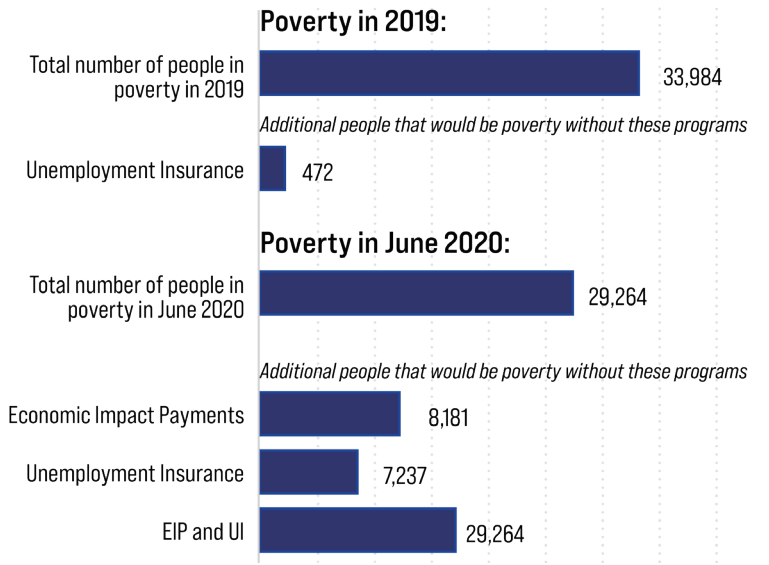


Understanding the dire consequences of poverty, the government took historic steps to extend financial support to workers and those deeply impacted by the loss of employment due to COVID-19³¹.

In March of 2020, as job loss began to accelerate Congress temporarily strengthened the unemployment insurance system as part of the CARES Act by extending eligibility to low-wage, part-time, and self-employed workers. Additionally, an extra weekly UI benefit of \$600 and a one-time stimulus or Economic Impact Payment (EIP) of \$1,200 per adult and \$500 per child was included to reduce overall national poverty³³.

UNEMPLOYMENT INSURANCE AND ECONOMIC IMPACT PAYMENTS REDUCED POVERTY³²

³⁹



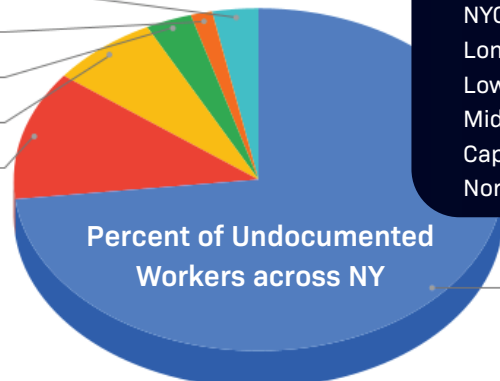
The Office of the State Comptroller has reported that from March 1 through October 23, 2020 New York has approved payments for nearly \$52.5B in unemployment benefits and related lost wages assistance supplements to workers in the State. More than 4.7M New Yorkers received state unemployment benefits totally more than \$97B Federal program support also helped New Yorkers recover with 1.2M receiving Pandemic Unemployment Insurance, 600K receiving Pandemic Unemployment Compensation and 537K receiving Pandemic Emergency Employment Compensation³⁵

The pandemic also created significant increases in food insecurity across the nation. The New York State Health Foundation has reported, in May 2020, in New York nearly one-quarter of adults in households with food scarcity reported being food sufficient prior to the pandemic, but by December 2020, that figure had risen to more than one-third of respondents³⁶.

Similar to trends in employment, there were stark disparities in food scarcity by race and ethnicity. In December 2020, nearly 1 in 3 Hispanic/Latinx New Yorkers (32%) and more than 1 in 5 Black New Yorkers (21%) reported household food scarcity in the last 7 days. These percentages were 2 to 3.5 times higher than among white New Yorkers. As of June 2021, there were more than 2.8M SNAP recipients throughout the state, a 1.9 % increase from June 2020³⁷.

New York also created a \$2.1B Excluded Worker Fund which provided financial assistance to New Yorkers for a one time payment to help cover costs associated with joblessness, such as back rent and medical bills. These costs were not covered by the various federal relief programs or the unemployment and pandemic benefits. This fund was created to benefit undocumented immigrants and others who weathered the pandemic without access to government relief³⁸.

- Northern and Western NY
- 3.0% Capital District
- 1.4% Mid-Hudson Valley
- 3.0% Lower Hudson Valley
- 7.1% Long Island
- 12.2%



Economic Impact of the Excluded Worker Fund³⁹

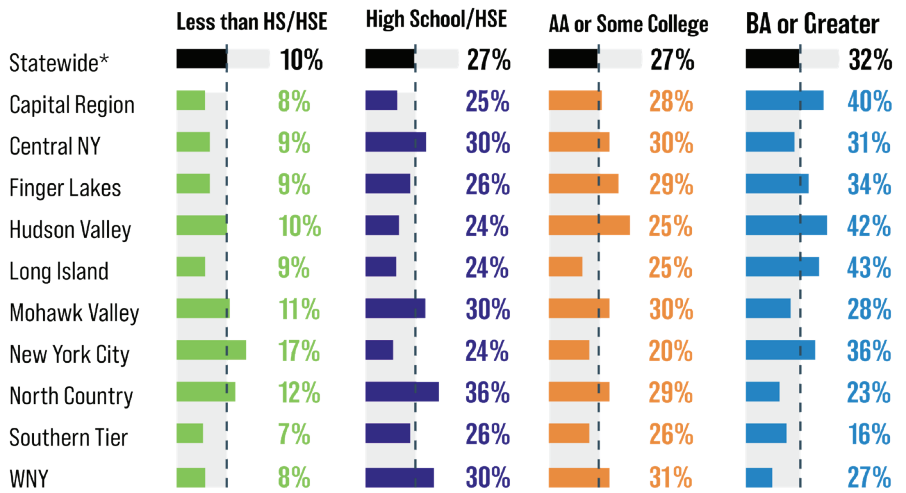
- NYC: 73% - received 81% of funding - a boost of \$768M
- Long Island - 12% - recieved 10% of funding - a boost of \$91M
- Lower Hudson Valley - 7% of funding - a boost of \$51M
- Mid-Hudson Valley - 3% - 1% of funding - a boost of \$10M
- Capital District - 1.4% - 0.3% of funding - a boost of \$2M
- Northern & Western NY - 3% - 1% of funding - a boost of \$7M

NYC
73.2%

Meeting Labor Demand

Following the last recession, Graduate degree holders gained 3.8M jobs, Bachelor's degree holders gained 4.7M jobs, and Associate's degree holders gained 3.1 M jobs, compared to workers with a high school diploma or less, who added only 80,000 jobs⁴⁰. Based on the latest available data, approximately 38.2% (5.22M) New Yorkers, 25 years or older, have a high school diploma/equivalency or less, 796K never entered the 9th grade and 2,075,506 New Yorkers have some college credits but no degree⁴¹. Thus illustrating the need to make a concerted effort to ensure more New Yorkers have access to high quality postsecondary education, including adult education.

EDUCATIONAL ATTAINMENT BY REGION⁴²



*note: numbers are estimates as not all counties are represented

Additionally in 2020, there were nearly 26,000 active registered apprenticeship programs nationwide with 3,143 new apprenticeship programs established, representing a 73% growth from 2009 level. This is the third-highest ever reported for the Registered Apprenticeship program⁴³.

In New York, registered apprenticeships included 634 sponsors, 965 programs, and 18,121 active apprentices, with 2,724 Certificates of Completion issued in 2021 and 1,275 Certificates of Completion issued in 2020⁴⁴. While traditional industries continue to dominate apprenticeship opportunities, New York added several new trades last year: Technical Sales Representative (Information Technology); Instructor/Trainer (Information Technology); Financial Services Representative; Sales Associate (Financial Services); Marketing Coordinator; Quality Assurance; Auditor; Visual and Graphic Arts Associate; and UI/UX Designer⁴⁶.

18,121⁴⁵
ACTIVE APPRENTICES
ACROSS NEW YORK

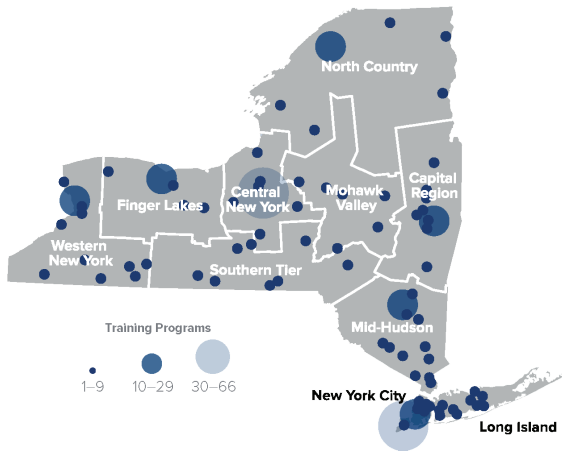
2,724 Certificates of Completion issued in 2021

1,275 Certificates of Completion issued in 2020

Recent legislation in New York and nationally will increase the number of jobs in emerging industries like Clean Energy and Cannabis. Depending on the source, both of these sectors could create upwards of 50,000 new jobs in the State.

The 2020 Climate Leadership and Community Protection Act has a mandated goal of a zero-emission electricity sector by 2040, including 70 % renewable energy generation by 2030, and to reach economy-wide carbon neutrality⁴⁷. Investments in wind farms are expected to create 1,600 jobs, which will need to be filled by a highly trained and skilled workforce. Building and operating the farms will also create construction jobs, with new sites expected in the Capital Region, Staten Island, Brooklyn, and Long Island to help support the growing industry⁴⁸. Farmingdale State College and Stony Brook have plans to train at least 2,500 workers in the next five years. The state's goal is to have 70% of New York's power come from offshore wind by 2035⁴⁹. Wind Energy is one of the Top 5 Emerging Skill Clusters for the State with a starting salary of \$72K⁵⁰.

CLEAN ENERGY TRAINING PROGRAMS ACROSS NY⁵¹



25% of programs are available online - a number increasing with COVID-19 adaptations

43% of training opportunities are found within colleges and universities

17% of training programs are offered by vocational and technical schools

The Rockefeller Institute has estimated that the emerging Cannabis industry in New York could yield between \$1.3B and \$3.1B, eventually employing over 40,000 workers across the State. Based on data from other states the jobs are concentrated in cultivation; manufacturing; and retail/dispensaries. The New York State Cannabis Control Board is in the process of setting up the regulatory environment for adult use cannabis, and expects additional information to be available in 2022⁵².

The COVID-19 pandemic and resulting economic crisis are putting a premium on upskilling—giving workers new skills to meet new workforce demands—and on greater transparency around the skills and knowledge required for in-demand jobs. New York lacks a robust system of information related to the credentials

REGIONAL TRAINING AVAILABILITY⁵⁶

X = self reported training program in region

ADVANCED MANUFACTURING	WNY	FL	ST	CNY	MV	NC	CR	MH	NYC	LI
Industrial Machine Mechanic				X	X					X
Machinist	X	X	X	X			X			X
Computer Numerically Controlled Tool Operator	X	X	X	X						X
Cutting, Punching, and Press Machine Setter/Operator, and Tenders, Metal and Plastic				X			X			
CONSTRUCTION	WNY	FL	ST	CNY	MV	NC	CR	MH	NYC	LI
HVAC and Refrigeration Mechanic/Installer		X				X	X	X	X	X
Electrician	X					X	X	X	X	
Carpenter, General Construction Worker	X	X			X			X	X	X
Mason, General Construction Laborer					X				X	
MIG,TIG,STICK Welding					X	X	X			
CDL Class B Driver / Commercial Driver License / Heavy Equipment Operator		X	X		X					
HEALTH CARE	WNY	FL	ST	CNY	MV	NC	CR	MH	NYC	LI
Nursing Assistant		X			X	X	X			X
Licensed Practical Nurse		X	X		X	X	X			
Medical Assistant							X	X		
Medical Billing/Coding								X	X	X
Pharmacy Tech								X	X	
INFORMATION TECHNOLOGY	WNY	FL	ST	CNY	MV	NC	CR	MH	NYC	LI
Computer Use and Network Support Specialist	X	X	X	X					X	
Web Design and Digital Interface Developer	X		X	X					X	
Computer Systems Analyst				X				X	X	
Software developer and quality assurance				X					X	

Western NY (WNY), Finger Lakes (FL), Southern Tier (ST), Central NY (CNY), Mohawk Valley (MV), North Country (NC), Capital Region (CR), Mid-Hudson (MH), New York City (NYC), Long Island (LI)

available within a state, including the credential program’s length and cost, competencies and job skills included in the credential, career pathway information, and earnings and employment outcomes⁵³.

In New York alone, the national credential registry web service Credential Engine, estimates a total of 28,246 credentials including: 13,659 Degrees; 6326 Certificates; 880 Apprenticeships; 161 Licenses; 7220 High School Diplomas⁵⁴, yet in a recent training scan conducted by NYATEP, significantly less programs were identifiable. The lack of an up-to-date, comprehensive repository of all workforce and postsecondary training in the State makes navigating and collecting information on regional availability, number of slots, cost, and/or connection to employment made data collection difficult.

Out of the 733 statewide respondents, the largest volume of training was reported in healthcare, with just over 14,000 slots (the majority as in-person training). Nursing Assistant was the dominant occupation. Technology had the most virtual training available, with 5,185 slots conducted remotely; and 2,445 in person. The training costs was broad and variable, ranging from \$1,900 in IT to \$70,000 for construction training⁵⁵.

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