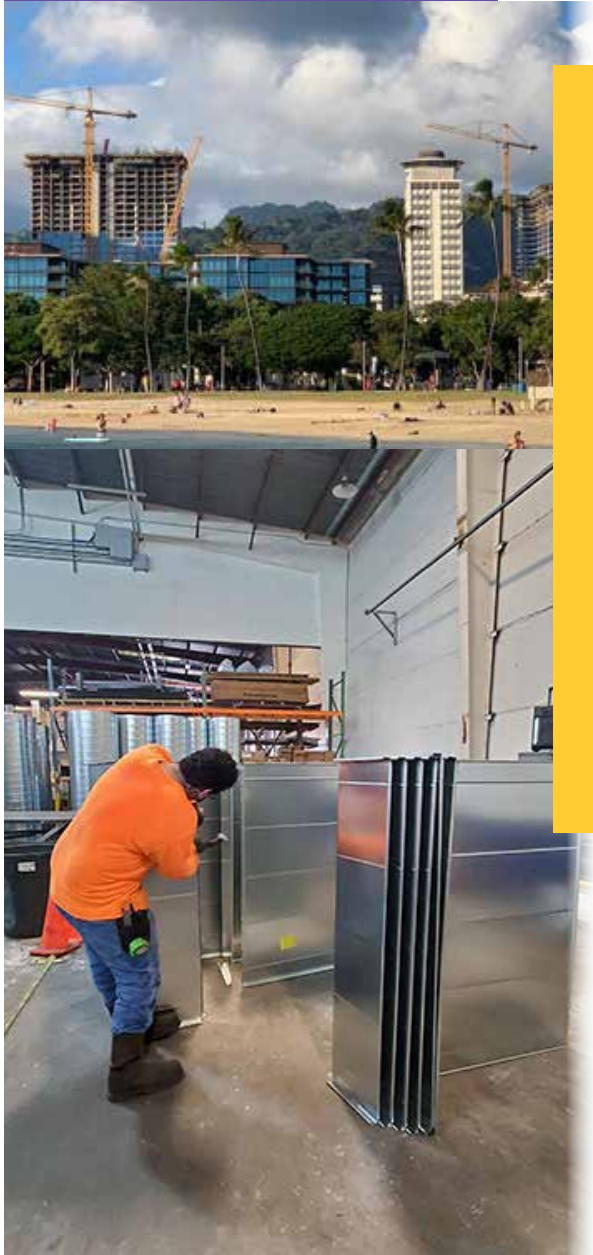


STATE OF HAWAI'I



EMPLOYMENT FORECASTS *for the* SHORT-TERM FUTURE

1st Quarter
2022

March 2021



STATE OF HAWAI'I
Department of Labor
and Industrial Relations



State of Hawai'i
David Y. Ige, Governor

Department of Labor and Industrial Relations
Anne Eustaquio, Director

Research and Statistics Office
Jeri Sato, Acting Chief

Labor Market Research Section
Jeri Arucan, Supervisor
Giovanni Vila, Research Statistician
Melonie Ogata, Research Statistician

830 Punchbowl Street, Room 304
Honolulu, HI 96813
phone: (808) 587-5668
email: dlii.rs.hiwi@hawaii.gov



*For more detailed projections data,
visit the HIWI website: www.hiwi.org*



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Introduction

Employment Forecasts for the Short-Term Future is produced annually and provides short-term industry and occupational forecasts for the State of Hawai'i. The two-year projection period is from the first quarter of 2020 to the first quarter of 2022.

Looking back at last year, the first case of the coronavirus was confirmed in Hawaii on March 6, 2020. The initial "Stay-at-Home, Work-at-Home" order issued by the Governor on March 25 effectively shut down all non-essential businesses statewide. The ensuing layoffs and furloughs began appearing in the April payroll reports so the 2020 1st quarter employment serves as a pre-pandemic job count. Tourism, Hawai'i's main economic driver, practically came to a halt when travelers were required to quarantine for 14 days upon arrival. A second shutdown was instituted on August 27 for Oahu only when cases started to spike. Then, on October 15 incoming travelers could avoid quarantine if they provided a negative COVID test result within three days of arrival which gave the visitor count a slight boost. This forecast assumes the state will eventually relax the restrictions on businesses as more people get vaccinated and the number of cases diminish in the Spring.

The information in this report may be used by students and jobseekers who are making career decisions; education and training program planners who develop specific occupational training programs; job placement specialists who help people find employment; counselors who assist individuals in selecting careers; policy decision makers who develop short-range to long-range personnel policies; and employers who need information to help with planning the expansion or relocation of their businesses.

Prior to using the employment forecasts in this publication, it is important to understand the methodology used to develop these projections and note the limitations of the data.

This publication and other related reports are available on our Employment Projections page on the Hawai'i Workforce Infonet (HIWI) website: <https://www.hiwi.org/gsipub/index.asp?docid=729>.

Methodology

The U.S. Department of Labor’s Employment and Training Administration (ETA) provides funding to all states to produce employment projections using the methodology, software, and guidelines specified by the Projections Managing Partnership (PMP). The required system, Projections Suite, was developed by the Utah Department of Technology Services.

Industry employment is obtained from the Hawai’i State Department of Labor and Industrial Relations’ Quarterly Census of Employment and Wages (QCEW) program which includes employment *covered* by unemployment insurance. Employment in educational services (both private and public) comes from the Current Employment Statistics (CES) program which includes *non-covered* employment. Since both the QCEW and CES data does not include any non-covered farmers and agriculture employment, other sources are used. The farming data from the 2017 Census of Agriculture and non-covered agriculture employment from the Bureau of Economic Analysis was used to estimate farmers and supplement agriculture employment. Monthly employment was compiled from January 1990 to March 2020.

Prior to forecasting industry employment, analysts select a state leading index comprised of a combination of variables that helps anticipate changes in employment. National economic variables are provided with the application and state variables include civilian labor force, unemployment rate, average weekly hours and earnings, general fund revenues, transient accommodations tax, building permits, visitor arrivals, and retail sales. The system uses a series of statistical models to project employment and a forecast is chosen based on established statistical methodology. The forecasts are adjusted based on current industry employment trends and near future economic events.

Staffing patterns were derived from the May 2019 Occupational Employment Statistics (OES) survey, using both the 2010 and 2018 Standard Occupational Classification (SOC) codes. The patterns are used to divide each industry’s employment into different occupations, forming a matrix. The system applies occupational change factors to the projected patterns to form a projected matrix. Using national self-employment staffing patterns provided by the Bureau of Labor Statistics (BLS), the system generates employment estimates and projections for self-employed workers.

A separations methodology developed by BLS captures an accurate picture of the workforce and can differentiate between workers who are leaving the labor force entirely and those who are changing jobs and leaving an occupation. Information about this methodology is available online at: <https://www.bls.gov/emp/documentation/separations-methods.htm>.

The total job openings are the sum of three types of job openings:

- Job openings due to **growth** are created by employment expansion. It is the difference between projected year employment and base year employment divided by two.
- Job openings due to **transfer** occur when someone moves from one type of occupation to a different type such as for a promotion or career change.
- Job openings due to **exit** appear when someone leaves the workforce for at least four months, retires, or dies.

Data limitations:

These forecasts are based on historical employment trends and do not consider any economic events that occurred after data were finalized in January 2021. Preliminary industry employment data for the 2nd and 3rd quarters of 2020 were available to help guide the short-term forecasts. Projections should be viewed as indicators of relative magnitude and direction rather than as forecasts of absolute occupational demand. Therefore, it is more meaningful to look at the rate of growth rather than the number projected for employment in the first quarter of 2022. It is also useful to compare growth rates between industries or occupations, relative to each other and to the overall total. The number of job openings due to growth may be more indicative of actual opportunities than the openings due to transfers and exits.

Highlights



Statewide employment is forecasted to decline by 65,710 jobs or 9.1 percent from 719,780 in the first quarter of 2020 to 654,070 in the first quarter of 2022.

The construction industry will lead the state's recovery from the pandemic. It is anticipated to post the fastest growth rate of 0.9 percent and the most new jobs with 320.

Health support occupations will show the most resilience coming out of the downturn just ten jobs short of pre-COVID employment levels.

About 40,750 total annual job openings are expected during the forecast period.

This includes 41,630 openings resulting from transfers and 31,980 openings due to exits minus 32,860 projected job losses.

THE INDUSTRY PERSPECTIVE . . .

- The most solid industry will be **construction** as it is expected to post a 0.9 percent growth rate while creating 320 new jobs.
- The **health care and social assistance** industry is poised to generate 270 jobs, growing by 0.4 percent.
- The hardest hit will be **accommodation** with a projected loss of 16,350 jobs for a 37.7 percent drop. The severity of this deficit is due to the virtual shutdown of tourism when incoming travelers were required to quarantine for 14 days upon arrival in the islands.
- With dependence on the visitor industry, **food services and drinking places** also felt the impact of travel restrictions on their business. Coupled with limitations on in-person dining and restaurant capacity, the forecast is for 16,370 job cuts, a 23.7 percent decrease.

THE OCCUPATIONAL PERSPECTIVE . . .

- The **healthcare support** occupations will fare the best but will fall just ten jobs short of reaching its pre-pandemic job count. *Home health and personal aides* will benefit from the most job creation, while massage therapists will see a large reduction in jobs.
- The largest occupational group, **food preparation and serving related**, will suffer the steepest employment drop of 22.6 percent or 19,640 jobs. *Waiters and waitresses* will be the hardest hit due to the ongoing restrictions on indoor dining and reduced restaurant capacity.
- The **office and administrative support** jobs is the second largest occupational group and will produce the most annual job openings with 4,830, all due to transfers and exits.

Industry Forecasts

Statewide employment is forecasted to contract by 65,710 jobs or 9.1 percent from 719,780 in the first quarter of 2020 to 674,070 in the first quarter of 2022. The COVID-19 pandemic severely affected the economy and only five of 22 major industries are expected to fully recover during this two-year period.

Last year's forecast of 0.5 percent job growth was indicative of a sluggish economy at the time but would look very favorable now compared to the current projection of a 9.1 percent decline as the COVID pandemic sent Hawai'i's job count on a steep decline. Seventeen of 22 major industries are expected to slump, especially accommodation and food services and drinking places (Table 1). On a brighter note, several of Hawai'i's sectors are anticipated to expand: construction; utilities; and healthcare and social assistance. Mining, along with finance and insurance, will remain stable.

The **construction** industry was categorized as essential when the state shut down in March 2020 and will lead the state in job creation with a projected increase of 320 jobs or 0.9 percent over the next two years. Within this industry, the *specialty trade* sector will spur most of the growth while *construction of buildings* and *heavy and civil engineering construction* will improve slightly.

Health care & social assistance had 77,150 jobs in quarter one of 2020 making it the largest industry in the state and is expected to generate 270 jobs accounting for 0.4 percent growth (Figure 1). The industry was resilient because many employees were working on the frontlines in response to the COVID crisis. *Ambulatory health care services* and *hospitals* will provide a big boost, along with some help from *nursing and residential care facilities*. Although the industry is not expanding rapidly, any amount of growth contrasts the downturn in the other large industries.

Although **educational services** are projected to lose 370 positions, it is a minor decrease of 0.6 percent relative to other major industries. *Public education* is expected to remain relatively stable, while *private education* positions may edge downward. Private schools may suffer because families may not be able to afford the cost of tuition and declining enrollment makes it difficult for smaller schools to survive.

Table 1

INDUSTRY EMPLOYMENT AND GROWTH, 2020-2022
(sorted by percent growth)

INDUSTRY	EMPLOYMENT		GROWTH (2020-22)	
	2020 Q1	2022 Q1	NUMBER	PERCENT
Construction	36,260	36,590	320	0.9%
Utilities	3,700	3,720	20	0.6%
Health Care and Social Assistance	77,150	77,430	270	0.4%
Mining	230	230	0	0.0%
Finance and Insurance	16,190	16,190	0	0.0%
Educational Services	66,950	66,580	-370	-0.6%
Government	75,360	74,640	-720	-1.0%
Agriculture, Forestry, Fishing and Hunting	6,740	6,550	-190	-2.8%
Professional, Scientific, Technical Services	24,820	23,920	-900	-3.6%
Management of Companies & Enterprises	8,980	8,610	-370	-4.2%
Retail Trade	70,430	66,430	-4,000	-5.7%
Wholesale Trade	17,990	16,840	-1,150	-6.4%
Self Employed Workers	53,620	48,930	-4,690	-8.8%
Other Services	26,720	24,310	-2,420	-9.0%
TOTAL, ALL INDUSTRIES	719,780	654,070	-65,710	-9.1%
Information	8,820	7,990	-830	-9.4%
Manufacturing	13,680	12,370	-1,300	-9.5%
Real Estate and Rental and Leasing	13,020	11,500	-1,520	-11.7%
Admin, Support, Waste Mgmt, Remediation Svcs	40,550	34,290	-6,260	-15.4%
Arts, Entertainment, and Recreation	13,490	11,020	-2,470	-18.3%
Transportation and Warehousing	32,470	26,040	-6,420	-19.8%
Food Services and Drinking Places	69,240	52,870	-16,370	-23.7%
Accommodation	43,380	27,030	-16,350	-37.7%

Employment total may not add due to rounding to the nearest ten. Number and percent growth is calculated on unrounded data.

At the onset of the pandemic, **government** was deemed an essential industry. It is Hawai'i's second largest industry with 75,360 jobs in 2020's first quarter and is expected to decline by 1.0 percent, reducing government payrolls by 720 positions. Much of the decrease will occur in the *state* branch - there is an ongoing discussion in the legislative session about possible job cuts and furloughs because of lower state revenues. Meanwhile, the *local* branch is projected to experience minimal losses and the *federal* branch is the only source of job creation.

The **professional, scientific, and technical services** industry is forecasted to lose 900 jobs at a rate of 3.6 percent.

The third largest industry, **retail trade**, is slated to lose 4,000 positions for a decrease of 5.7 percent, which would make it the fourth largest industry at the end of the forecast period. Majority of this deficit stems from the *clothing and clothing accessories* sector which were considered non-essential businesses during the state's lockdown. A silver lining is that two sectors designated as essential, *building material* and *food and beverage stores*, will both generate new jobs in retail.

Figure 1

INDUSTRIES WITH OVER 20K EMPLOYMENT, 2020-2022

	2020 Q1 Employment	New Jobs Forecasted	Growth Rate
Health Care & Social Assistance	77,150	270	0.4%
Government	75,360	-720	-1.0%
Retail Trade	70,430	-4,000	-5.7%
Food Services & Drinking Places	69,240	-16,370	-23.7%
Educational Services	66,950	-370	-0.6%
Accommodation	43,380	-16,350	-37.7%
Admin, Support, Waste Mgmt & Remediation	40,550	-6,260	-15.4%
Construction	36,260	320	0.9%
Transportation & Warehousing	32,470	-6,420	-19.8%
Other Services	26,720	-2,420	-9.0%
Professional, Scientific, Technical Services	24,820	-900	-3.6%

Employment in **other services** is projected to decrease by 2,420 at a rate of 9.0 percent, mostly in *personal and laundry services*. Workers in hair and nail salons were reduced due to pandemic restrictions. With some hotels closed during the lockdown and many people working from home, the demand for laundry and dry-cleaning services dwindled.

Administrative, support, waste management, and remediation services is forecasted to lose 6,260 jobs for a 15.4 percent decline. The weakness is in the *administrative and support services* sector. However, *waste management and remediation services* will improve slightly.

The sector most severely affected by state lockdowns stemming from coronavirus concerns, **accommodation**, is forecasted to lose 37.7 percent of its workforce, affecting 16,350 jobs. Travel restrictions requiring visitors to quarantine for two weeks upon arrival or get a COVID-19 test has dampened the amount of visitor arrivals. Further exacerbating the situation was that airlines had to operate at reduced capacity to allow for social distancing, which meant fewer visitors coming to Hawai'i. Hotels experienced a devastating drop in occupancy rates and were forced to lay off or furlough workers and many closed completely. Unless visitor arrivals rise significantly, the industry will not fully recover to pre-pandemic levels.

Also reliant on tourism, **food services & drinking places**, is projected to lose 16,730 jobs at a rate of 23.7 percent. This sector was heavily impacted by COVID as many restaurants closed following the initial lockdown orders and never reopened. For those that did open, the pandemic resulted in many restrictions being introduced such as the move to take-out only service and later the limit of in-person dining to 50 percent capacity to accommodate social distancing guidelines. Bars were strongly affected by the government-mandated shutdown. This industry will not recover completely until restrictions are lifted and tourism returns to pre-pandemic levels.

Transportation and warehousing jobs are projected to decrease by 6,420, with the third largest percentage decrease in positions among all industries at 19.8 percent over the next two years. *Air, transit and ground passenger*, and *scenic and sightseeing transportation* account for majority of the cuts. It may take a considerable amount of time for this industry to recover because of its dependence on tourism.

Occupational Forecasts

Statewide employment is forecasted to decline by 9.1 percent from 719,780 in the first quarter of 2020 to 654,070 in the first quarter of 2022, totaling 65,710 job losses. On an annual basis, there will be 32,860 job losses over the two-year forecast period. About 41,630 job openings are expected to arise as people transfer to other types of occupations and another 31,980 due to people leaving the workforce. The total number of annual job openings will be 40,750, despite the significant job losses incurred as a result of the COVID-19 pandemic.

Major Occupational Groups

All 22 major occupational groups are expected to shed jobs between the first quarter of 2020 and 2022 because recovery from the pandemic will take longer than two years. Table 2 lists the occupational groups in descending order of projected growth rate as compared to the overall growth rate for the total of all occupations.

Healthcare support jobs are forecasted to remain relatively stable, falling just 10 jobs shy of its pre-COVID count. There will be healthy job creation for *home health and personal care aides* but a sharp drop in demand for *massage therapists* will cancel out those gains. *Medical assistants* will display moderate growth, but *nursing assistants* will not generate any new positions.

Another major group of occupations that should experience a minimal amount of job losses is **community and social service** with a projected shortfall of 60 positions or 0.5 percent. *Substance abuse, behavioral disorder, and mental health counselors* are expected to increase slightly, along with *mental health and substance abuse social workers*. However, other notable occupations are anticipated to shed positions: *child, family, and school social workers; educational, guidance, school, and vocational counselors; and social and human service assistants*.

Table 2

OCCUPATIONAL EMPLOYMENT AND GROWTH, 2020–2022
(sorted by percent growth)

OCCUPATIONAL GROUP	EMPLOYMENT		GROWTH		ANNUAL AVERAGE OPENINGS			
	2020 Q1	2022 Q1	#	%	GROWTH	TRNSFR	EXIT	TOTAL
Healthcare Support	25,680	25,670	-10	0.0%	-10	1,370	1,350	2,720
Community & Social Svc	11,980	11,910	-60	-0.5%	-30	700	410	1,080
Healthcare Practitioners & Technical	33,190	32,970	-230	-0.7%	-110	810	830	1,530
Education, Trng, Library	50,450	49,740	-710	-1.4%	-360	2,040	2,210	3,900
Construction & Extraction	38,150	37,460	-690	-1.8%	-340	2,380	1,110	3,150
Life, Physical, Social Sci	7,820	7,670	-140	-1.8%	-70	490	160	580
Architecture & Engineering	10,440	10,200	-230	-2.2%	-120	450	250	590
Computer & Math	11,800	11,480	-320	-2.7%	-160	540	200	580
Legal	4,810	4,650	-160	-3.4%	-80	160	120	200
Business & Financial Operations	32,610	31,240	-1,370	-4.2%	-690	1,750	910	1,980
Farming, Fishing, Forestry	4,990	4,780	-210	-4.3%	-110	500	200	600
Management	53,170	49,450	-3,720	-7.0%	-1,860	2,200	1,720	2,060
Protective Service	21,040	19,370	-1,670	-7.9%	-830	1,150	900	1,220
Installation, Maint, Repair	27,330	24,940	-2,390	-8.7%	-1,190	1,450	820	1,080
TOTAL, ALL OCCUPATIONS	719,780	654,070	-65,710	-9.1%	-32,860	41,630	31,980	40,750
Office & Admin Support	84,000	76,260	-7,740	-9.2%	-3,870	4,620	4,080	4,830
Production	15,830	14,310	-1,510	-9.6%	-760	980	670	900
Arts, Design, Entertainment, Sports, Media	12,840	11,600	-1,240	-9.7%	-620	730	470	580
Sales & Related	64,320	57,680	-6,640	-10.3%	-3,320	4,390	3,270	4,340
Transportation & Material Moving	55,830	49,500	-6,340	-11.4%	-3,170	3,540	2,640	3,020
Personal Care & Service	23,130	19,780	-3,350	-14.5%	-1,670	1,650	1,530	1,510
Building & Grounds Cleaning & Maintenance	43,400	36,060	-7,350	-16.9%	-3,670	2,900	2,460	1,690
Food Prep & Serving	87,010	67,370	-19,640	-22.6%	-9,820	6,810	5,650	2,650

Employment total may not add due to rounding to the nearest ten. Number and percent growth is calculated on unrounded data.

The **life, physical and social science** occupational group is predicted to cut 140 positions or 1.8 percent of its workforce and all types of positions will share in the deficit.

The group of **healthcare practitioners and technical** occupations will dip by 0.7 percent or 230 positions. The only jobs with a positive outlook in this forecast period are *nurse practitioners, physician assistants, and respiratory therapists*.

The largest occupational group, **food preparation and serving related**, will suffer the greatest setback of 22.6 percent eliminating 19,640 positions. The severe drop off is expected because restaurants were restricted to take-out service due to COVID-19 health and safety protocols implemented by the government. Even when in-person dining was allowed, it was only at 50 percent capacity and many restaurants ended up closing permanently. Couple that with the fewer number of tourists and it's no surprise that these occupations will recover at the slowest pace. *Waiters and waitresses* are expected to bear the brunt of cutbacks because they are not needed to provide take-out only service.

Another group that is anticipated to undergo significant job reduction is **building and grounds cleaning and maintenance** with 7,350 job cuts or 16.9 percent. Dependence on the hotel industry will cause the sluggish rebound expected for *maids and housekeeping cleaners* and *landscaping and groundskeeping workers*. In addition, as companies sent their employees home to work remotely, many offices required less *janitors and cleaners*.

The **personal care and service** occupational group is pegged to fall 14.5 percent as it cuts 3,350 positions. All categories are expected to contribute to the cutbacks, but many are related to the weak tourism industry: *baggage porters and bellhops; amusement and recreation attendants; tour and travel guides; concierges; and recreation workers*. Others are tied to non-essential businesses that were forced to shutdown: *hairstylists and cosmetologists; fitness trainers and aerobics instructors; and ushers, lobby attendant, and ticket takers*.

Despite the forecast for a widespread reduction in payrolls, there will still be job openings created when people transfer out of one type of occupation to another or exit the workforce entirely. The leader in total annual openings will be **office and administrative support** occupations with 4,830 but the prospects for job creation are discouraging with a projected 9.2 percent cut involving 7,740 jobs. The *hotel, motel, and resort desk clerks* will be the most affected.

The outlook for **sales and related** jobs are not optimistic with 10.3 percent or 6,640 jobs slated to be cut. However, there will still be 4,340 annual job openings due to transfers and exits, primarily for *retail salespersons* and *cashiers*.

Nearly 4,000 annual job openings will result from separations in **education, training, and library** occupations for *preschool, elementary, middle, secondary, and special education teachers, and assistants*. However, in terms of new job creation, the forecast is for a 1.4 percent decline of 710 jobs in this occupational group. Only *postsecondary health specialties teachers* will manage to create a small number of new positions.

Declining Occupations

The coronavirus pandemic wreaked havoc on the state’s short-term job opportunities and many of the occupations forecasted to have pronounced losses are in the **food preparation and serving** related field as noted by the asterisks in Table 3. Note that the first five jobs on this list are very large occupations with over 10,000 employees.

Table 3

DECLINING OCCUPATIONS, 2020–2022

OCCUPATION	JOBS LOST	% DECLINE
Waiters and waitresses*	-5,170	-26.1%
Maids and housekeeping cleaners	-4,460	-29.1%
Fast food and counter workers*	-3,440	-20.0%
Retail salespersons	-2,890	-11.5%
Restaurant cooks*	-2,630	-23.1%
Food preparation workers*	-1,540	-16.1%
Supervisors of food preparation and serving workers*	-1,440	-21.8%
Dining room, cafeteria attendants, bartender helpers*	-1,380	-26.5%
Security Guards	-1,330	-14.3%
Hotel, motel and resort desk clerks	-1,160	-36.4%

**Occupations are in the food preparation and serving related field.*

Occupations with Most Forecasted Jobs

COVID will take a heavy toll on job creation during this forecast period and only 15 occupations are anticipated to generate new jobs (Figure 2). **Home health and personal care aides** tops the list with 280 new positions. This is a medium-sized occupation with 9,350 employment in 1st quarter 2020 and is projected to expand at a 3.0 percent rate. A total of 10 occupations on the list are related to health care: *medical and health services managers; medical assistants; nurse practitioners; phlebotomists; physical therapy assistants; physician assistants; respiratory therapists; postsecondary health specialties teachers; and psychiatric aides*.

Figure 2

OCCUPATIONS WITH MOST FORECASTED JOBS, 2020–2022

	New Jobs Forecasted	Growth Rate
Home Health and Personal Care Aides	280	3.0%
Medical and Health Services Managers	60	3.8%
Solar Photovoltaic Installers	40	11.4%
Medical Assistants	40	0.9%
Nurse Practitioners	30	6.8%
Substance Abuse, Behavioral Disorder, Mental Health Counselors	20	1.9%
Phlebotomists	20	1.8%
Transportation Security Screeners	20	1.3%
Physical Therapist Assistants	10	3.6%
Physician Assistants	10	3.4%
Respiratory Therapists	10	2.7%
Health Specialties Teachers, Postsecondary	10	2.7%
Psychiatric Aides	10	1.7%
Electrical Power-Line Installers & Repairers	10	1.5%
Mental Health & Substance Abuse Social Workers	10	1.4%

Fastest Growing Occupations

The most rapidly growing jobs are usually small-sized occupations, so the list compiled in Figure 3 below includes occupations with at least 200 employees in 1st Quarter 2020. **Solar photovoltaic installers** top the list with a growth rate of 11.4 percent and is one of four construction and extraction occupations. The second fastest growing occupation is **nurse practitioners** at 6.8 percent. Ten more occupations on the list are in the health care field: *medical and health services managers; physical therapy assistants; physician assistants; home health and personal care aides; respiratory therapists; postsecondary health specialties teachers; postsecondary nursing instructors and teachers; phlebotomists; psychiatric aides; and medical assistants.*

Figure 3

FASTEST GROWING OCCUPATIONS, 2020–2022

(includes occupations with minimum of 200 employment)

	Growth Rate	New Jobs Forecasted
Solar Photovoltaic Installers	11.4%	40
Nurse Practitioners	6.8%	30
Medical and Health Services Managers	3.8%	60
Physical Therapist Assistants	3.6%	10
Physician Assistants	3.4%	10
Home Health and Personal Care Aides	3.0%	280
Respiratory Therapists	2.7%	10
Health Specialties Teachers, Postsecondary	2.7%	10
Nursing Instructors and Teachers, Postsecondary	1.9%	0
Substance Abuse, Behavioral Disorder, Mental Health Counselors	1.9%	20
Phlebotomists	1.8%	20
Psychiatric Aides	1.7%	10
Electrical Power-Line Installers and Repairers	1.5%	10
Elevator Installers and Repairers	1.5%	0
Mental Health and Substance Abuse Social Workers	1.4%	10
Transportation Security Screeners	1.3%	20
Glaziers	1.2%	0
Air Traffic Controllers	1.0%	0
Medical Assistants	0.9%	40
Reinforcing Iron and Rebar Workers	0.9%	0

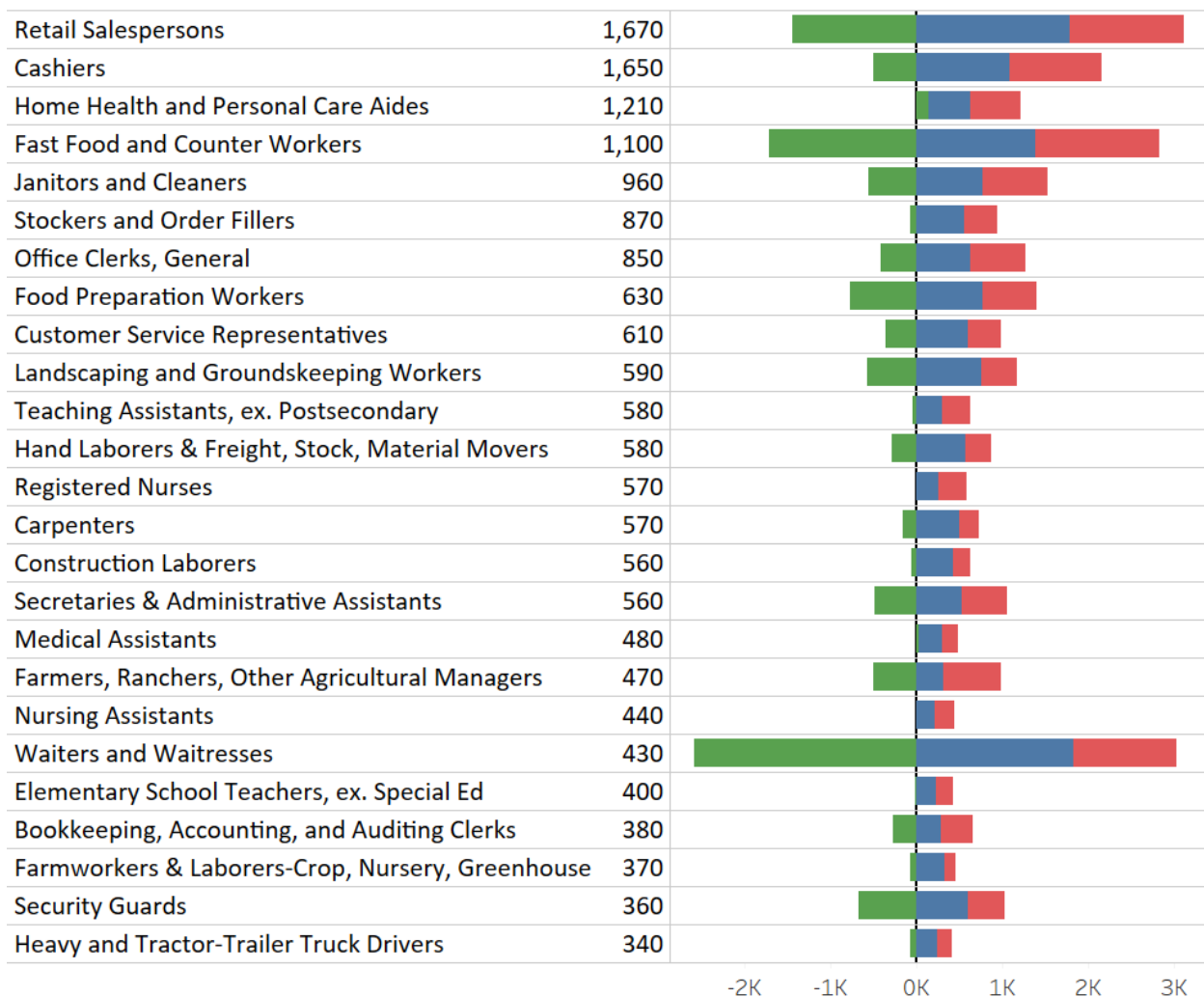
Occupations with the Most Job Openings

The top 25 jobs with the most job openings (Figure 4) tend to be large-sized occupations and are expected to have a lot of openings due to transfers and exits. The top two are sales related jobs: **retail salespersons** and **cashiers** with 1,670 and 1,650 openings, respectively. Listed third is **home health and personal care aides** with 1,210 job openings which include 140 annual openings due to economic growth. The only other job listed here with growth openings is **medical assistants** with 20. The remaining job on this list with at least 1,000 openings is **fast food and counter workers** with 1,100.

Figure 4

OCCUPATIONS WITH THE MOST JOB OPENINGS, 2020–2022

Total Annual Job Openings due to: **Growth** - **Transfers** - **Exits**



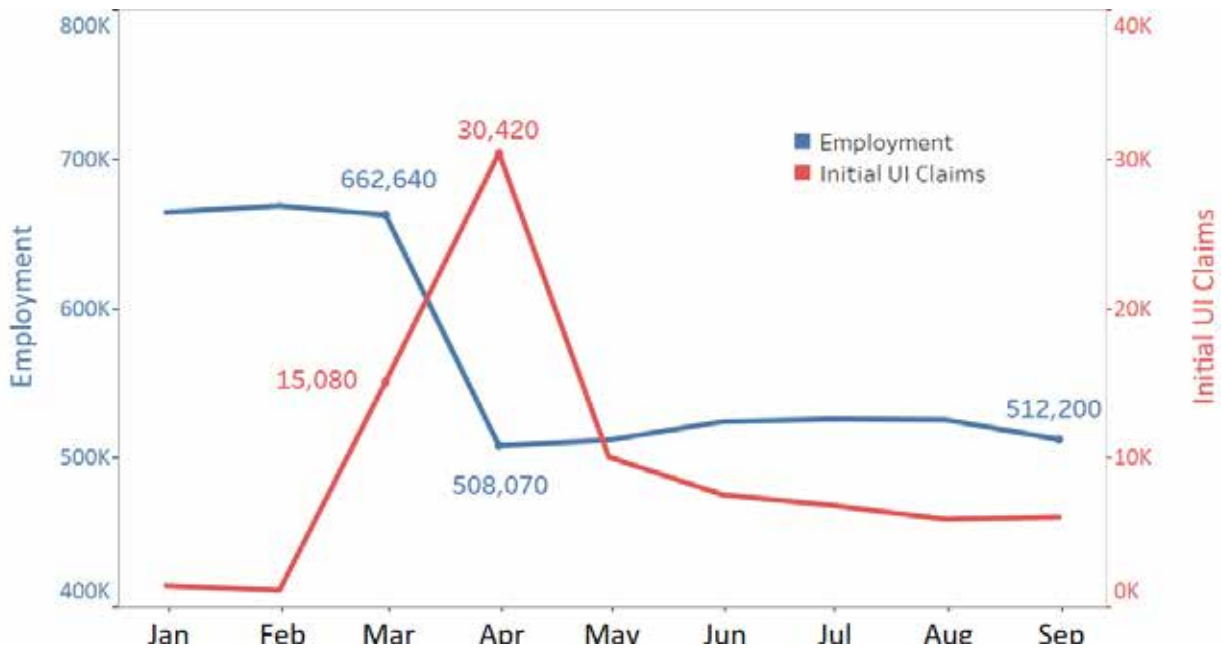
Recovery from the Pandemic

How has Hawai'i's economy fared since the first quarter 2020?

The layoffs and furloughs were reflected in monthly averages of initial unemployment insurance (UI) claims beginning in March 2020 (Figure 5). However, employment is reported for the week including the 12th of the month and the decline didn't appear on payroll reports until April. Preliminary monthly employment data revealed the low point of the pandemic-induced recession was in April when jobs tumbled over 23 percent, wiping out almost 155,000 jobs from March. The UI claims also peaked in April. Subsequent months showed small improvements but another lockdown in September on Oahu put a damper on the recovery. The September job count slid by 2.5 percent, representing a loss of over 13,000 positions.

Figure 5

EMPLOYMENT AND INITIAL UI CLAIMS, 2020



Note: April - September employment data are preliminary. The initial UI claims data is collected weekly and monthly averages were calculated for this comparison to monthly employment.

On a quarterly basis, total statewide employment plunged by 21.7 percent in the second quarter, erasing 144,260 jobs (Table 4). In the 3rd quarter it dipped by another 1.1 percent, eliminating 5,700 additional jobs. Overall, the deficit from the first to the third quarter of 2020 is 149,960 positions (or -22.5 percent).

Table 4

INDUSTRY EMPLOYMENT AND GROWTH, 2020
(sorted by Quarter 1 to Quarter 3 percent change)

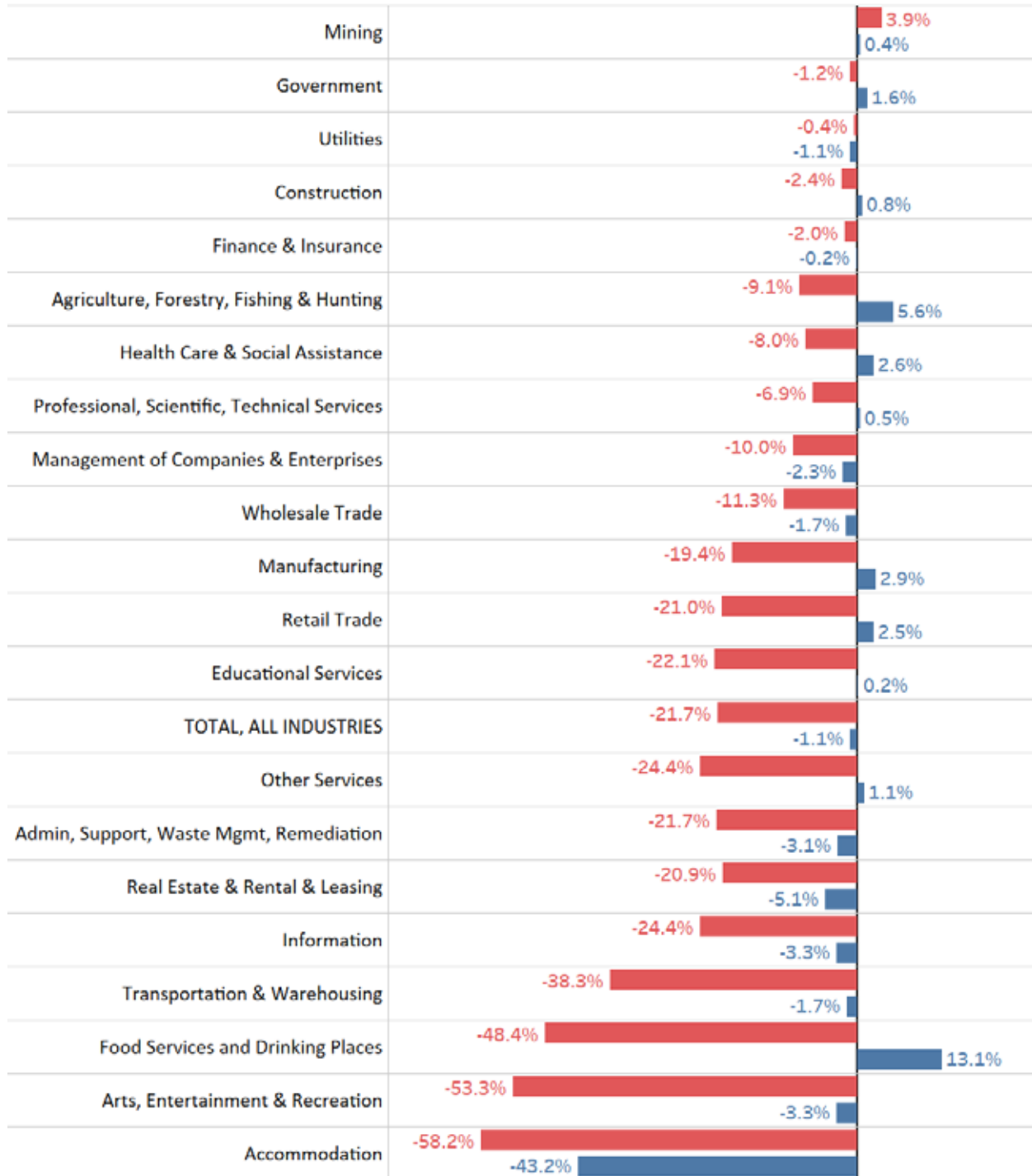
INDUSTRY	2020 EMPLOYMENT			PERCENT CHANGE		
	Qtr 1	Qtr 2	Qtr 3	Q1-Q2	Q2-Q3	Q1-Q3
Mining	230	240	240	3.9%	0.4%	4.3%
Government	75,360	74,470	75,630	-1.2%	1.6%	0.4%
Utilities	3,700	3,680	3,640	-0.4%	-1.1%	-1.5%
Construction	36,260	35,380	35,660	-2.4%	0.8%	-1.7%
Finance and Insurance	16,190	15,860	15,840	-2.0%	-0.2%	-2.2%
Agriculture, Forestry, Fishing, Hunting	5,860	5,330	5,630	-9.1%	5.6%	-3.9%
Health Care and Social Assistance	77,150	70,970	72,820	-8.0%	2.6%	-5.6%
Professional, Scientific, Technical Services	24,820	23,100	23,210	-6.9%	0.5%	-6.5%
Management of Companies & Enterprises	8,980	8,090	7,900	-10.0%	-2.3%	-12.1%
Wholesale Trade	17,990	15,960	15,680	-11.3%	-1.7%	-12.9%
Manufacturing	13,680	11,020	11,340	-19.4%	2.9%	-17.1%
Retail Trade	70,430	55,640	57,040	-21.0%	2.5%	-19.0%
Educational Services	66,950	52,190	52,290	-22.1%	0.2%	-21.9%
TOTAL, ALL INDUSTRIES	665,280	521,020	515,320	-21.7%	-1.1%	-22.5%
Other Services	26,720	20,210	20,440	-24.4%	1.1%	-23.5%
Admin, Support, Waste Mgmt, Remediation	40,550	31,730	30,770	-21.7%	-3.1%	-24.1%
Real Estate & Rental & Leasing	13,020	10,300	9,780	-20.9%	-5.1%	-24.9%
Information	8,820	6,670	6,450	-24.4%	-3.3%	-26.9%
Transportation and Warehousing	32,470	20,030	19,700	-38.3%	-1.7%	-39.3%
Food Services and Drinking Places	69,240	35,750	40,410	-48.4%	13.1%	-41.6%
Arts, Entertainment & Recreation	13,490	6,300	6,090	-53.3%	-3.3%	-54.8%
Accommodation	43,380	18,110	10,280	-58.2%	-43.2%	-76.3%

Percent change is calculated before employment is rounded to the nearest ten.

Figure 6

QUARTER-TO-QUARTER INDUSTRY GROWTH, 2020

2020 Quarter-to-Quarter Change: Qtr 1 to Qtr 2 | Qtr 2 to Qtr 3



Aside from **mining**, which is an extremely small industry with 230 jobs, **government** is the only major industry that exceeded its pre-pandemic employment level (Figure 6). Due to strength in the *federal* and *local* branches, government posted 0.4 percent job growth between the first and third quarter of 2020.

Construction jobs increased by 0.8 percent in the third quarter but was still down 1.7 percent from its pre-COVID job count. Likewise, **health care and social assistance** rose by 2.6 percent in third quarter but still fell 5.6 percent short of its first quarter employment level.

Retail trade managed to add back 2.5 percent of its workforce in the third quarter, but a huge slide of 21.0 percent in the second quarter was too much to overcome.

Similarly, **educational services** fell 21.9 percent below its pre-COVID payroll because of a steep decrease of 22.1 percent in the second quarter and just minimal expansion of 0.2 percent in the third quarter.

The industries with the biggest shortfall are those that depend heavily on the visitor industry. Due to the closure of many hotels, employment in **accommodation** plummeted by 58.2 percent in second quarter 2020 and another 43.2 percent in third quarter. This industry endured the most drastic loss of jobs among all major industries during the three-quarter period.

Without the usual visitor levels, the **arts, entertainment, and recreation** industry suffered a decline of 53.3 percent of their workforce in the second quarter. The third quarter diminished further but at a far lesser rate of 3.3 percent.

Bars were not able to stay open even while restaurants could open with some restrictions, and this may have led to a 48.4 percent reduction in **food services and drinking places** employment for the second quarter. However, as restrictions were relaxed on restaurants, they were able to regain some of that deficit with an increase of 13.1 percent in the third quarter.

Jobs in **transportation and warehousing** slid by 38.3 percent in second quarter and another 1.7 percent in third quarter.

