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CONTINUED IMPACT OF THE COVID-19 PANDEMIC ON THE KEY PARISHES IN THE NEW ORLEANS MSA JEFFERSON, ORLEANS AND ST. TAMMANY PARISHES

DATA SOURCE

Quarterly Census of Employment and Wages (QCEW), Bureau of Labor Statistics, U.S. Department of Labor

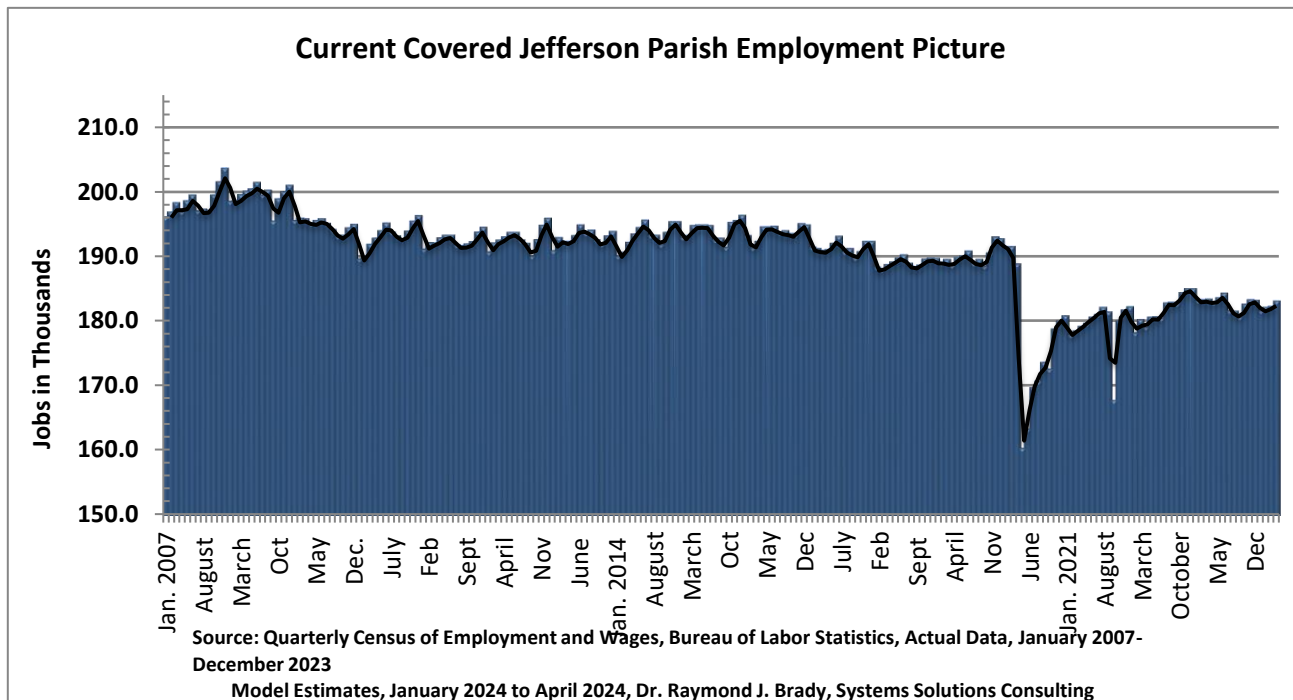
DEFINITIONS

Quarterly Census of Employment and Wages- The primary economic product is the tabulation of employment and wages of establishments which report to the Unemployment Insurance (UI) programs of the United States. Employment covered by these UI programs represents about 99.7% of all wage and salary civilian employment in the country. It counts only filled jobs, whether full or part-time, temporary or permanent, by place of work. Wages include bonuses, stock options, severance pay, profit distributions, cash value of meals and lodging, tips and other gratuities, and, in some States, employer contributions to certain deferred compensation plans such as 401(k) plans.

INDUSTRY ANALYSIS

Employment Change from 2007 to April 2024: Jefferson Parish

Table 1



Long-term Jefferson Parish's employment economy peaked in June 2008 at 201,900 QCEW jobs. During late 2019, the job situation showed an uptick before the floor dropped out of the parish economy due the Covid-Pandemic lockdown, with the job economy in April 2020 bottoming out with the loss of 31,200 jobs between February 2000 and April 2000. The level of total jobs fell from 191,100 jobs to 159,900 over this period. Between April and December 2020, the parish recovered 20,500 of the lost jobs. This recovery began to falter between December 2020 and May

2021, with job growth going side-ways. The parish job recovery trend improved again in 2021. Between January 2021 and December 2021, the parish added 4,300 QCEW jobs. Looking at the annual average data and between 2021 and 2022, QCEW jobs increased by 2,500 jobs. Between the annual average QCEW jobs in 2022 and 2023 the parish added 2,000 jobs. In April 2024, the parish had an estimated 182,700 QCEW jobs. However, the April 2024 I job estimate shows that the parish still had 8,400 fewer QCEW jobs than February 2020. On a positive note, job losses, due to the Covid-19 Pandemic, were not as severe as in Orleans Parish due to the virtual collapse of the Leisure and Hospitality industry. Long-term, Jefferson Parish’s employment environment as Table 1 shows has been running side-ways with no real upward trend in job growth.

Table 2
Covid 19 Pandemic Impact on Jefferson Parish Job Economy
4th Quarter 2019 to 4th Quarter 2023

	4 th Quarter 2019	4 th Quarter 2023	Change
JEFFERSON PARISH	191,649	182,620	-9,029
Accommodation and food services	20,776	17,961	-2,815
Construction	13,138	11,635	-1,503
Retail trade	26,951	25,601	-1,350
Finance and insurance	8,527	7,570	-957
Administrative and waste services	14,205	13,451	-754
Transportation and warehousing	9,657	9,099	-558
Arts, entertainment, and recreation	4,732	4,212	-520
Utilities	1,162	700	-462
Wholesale trade	9775	9,314	-461
Mining	634	215	-419
Manufacturing	9,003	8,638	-365
Educational services	8,973	8,641	-332
Public administration	6,211	6,123	-88
Other services, except public administration	6,009	6,006	-3
Agriculture, forestry, fishing, and hunting	41	43	2
Management of companies and enterprises	2,798	2,858	60
Real estate and rental and leasing	3,686	3,850	164
Professional and technical services	9,975	10,301	326
Health care and social assistance	33,380	33,845	465
Information	2,017	2,544	527

Source: Quarterly Census of Employment and Wages, Bureau of Labor Statistics

Table 2 illustrates the continuing impact of the Covid-19 Pandemic on employment sectors in Jefferson Parish. Fifty-four percent (54%) of the job losses were concentrated in Accommodations and Food Services (NAICS 72), Construction (NAICS 23) and Retail Trade (NAICS 52).

Table 3 points out that the parish job base never recovered to the pre-Hurricane Katrina level, as of the 4th quarter of 2023.

**Table 3
Historical Change in Jobs in Jefferson Parish**

	NAICS	Year 2005	Year 2023	Change 2nd Quarter 2005 to 4th Quarter 2023
		2nd Quarter	4th Quarter	
		Quarterly Employment	Quarterly Employment	
JEFFERSON		216,401	182,620	-33,781
Educational services	72	suppressed	8,641	*
Health care and social assistance	81	28,672	33,845	5,173
Management of companies and enterprises	62	2,602	2,858	256
Transportation and warehousing	53	8,920	9,099	179
Professional and technical services	61	10,212	10,301	89
Agriculture, forestry, fishing and hunting	11	80	43	-37
Other services, except public administration	44-45	6,432	6,006	-426
Public administration	48-49	6,619	6,123	-496
Utilities	22	1,366	700	-666
Arts, entertainment, and recreation	92	5,065	4,212	-853
Information	54	3,462	2,544	-918
Real estate and rental and leasing	56	4,919	3,850	-1,069
Finance and insurance	55	9,315	7,570	-1,745
Mining	21	1,980	215	-1,765
Construction	23	13,960	11,635	-2,325
Administrative and waste services	71	16,951	13,451	-3,500
Wholesale trade	51	13,056	9,314	-3,742
Accommodation and food services	31-33	23,126	17,961	-5,165
Retail trade	52	30,902	25,601	-5,301
Manufacturing	42	17,338	8,638	-8,700

Source: Quarterly Census of Employment and Wages, Bureau of Labor Statistics

As pointed out in Table 3, the collapse of the ship building industry in the parish left economic wounds in which the parish still has not recovered. The only sectors in the parish which either recovered to the pre-Katrina job level or grew well past the base year 2005 level were Health Care and Social Assistance, Management of Companies, Transportation and Warehousing and Professional and Technical Services. Comparing the change in jobs between Tables 2 and 3 reveals structural changes in the parishes economy before the economic shock brought on by the Covid-19 Pandemic.

First, the current base of manufacturing in the parish did well during the economic shock of the pandemic. Manufacturing, after the economic shock of the collapse of ship building in the parish, stabilized between the 8,000 to 9,000 range. Retail Trade, affected by changes in product delivery technology and cost reductions stabilized starting in the 1st quarter 2018 within the 25,000 to 26,000 job range. However, continued slow contraction is likely to continue because of behavior changes in shopping habits vis-à-vis on-line shopping. Overall, the parish total jobs are likely to recover in the near term to a level of between 182,000 to 185,000. However, as Table 1 illustrates, the current long-term trend suggests a very slow or no job growth path.

**Table 4
Jefferson Parish Top Ten Private Sector Job Industries and Annual Pay Profile in 2023**

TOP TEN JOB INDUSTRIES AND AVERAGE ANNUAL PAY			
NAICS		Jobs	Annual Average Pay
10	total, all industries	167,765	\$62,143
722	Food services and drinking places	17,146	\$24,073
622	Hospitals	13,598	\$93,362
561	Administrative and support services	12,796	\$43,709
621	Ambulatory health care services	12,535	\$65,165
541	Professional, scientific, and technical services	10,515	\$81,993
238	Specialty trade contractors	7,074	\$66,436
423	Merchant wholesalers, durable goods	5,442	\$88,315
455	General merchandise retailers	5,064	\$28,831
524	Insurance carriers and related activities	4,839	\$93,373
445	Food and beverage retailers	4,361	\$30,140
TOP TEN AVERAGE PAY INDUSTRIES AND CORRESPONDING JOBS			
		Jobs	Annual Pay
711	Performing arts, spectator sports, and related industries	839	\$657,636
221	Utilities	275	\$132,979
519	Web search portals, libraries, archives, and other information services	31	\$131,619
325	Chemical manufacturing	725	\$123,623
425	Wholesale trade agents and brokers	677	\$123,063
523	Securities, commodity contracts, and other financial investments and related activities	415	\$114,877
483	Water transportation	690	\$109,933
513	Publishing industries	102	\$104,283
533	Lessors of nonfinancial intangible assets (except copyrighted works)	28	\$101,324
551	Management of companies and enterprises	2,803	\$95,453
Total Jobs and Weighted Average Pay		6,585	\$177,662

Source: Quarterly Census of Employment and Wages, Bureau of Labor Statistics

Table 4 above provides a snapshot of the 2023 Quarterly Census of Employment and Wages (QCEW) for the top ten industries in terms of employment and wages. The top ten **industries with respect to jobs** represent 56% of the total annual average parish jobs of 167,765 in 2023. Within the top ten industries with respect to jobs, Table 4 shows that 60% are concentrated in four industries. These industries by order of jobs (a) Food Services and Drinking Places, (b) Hospitals, (c) Administrative and Support Services and (d) Ambulatory Care Services. What is the comparative change in the *share* of the top ten employment sector over-time?

As noted above, the top ten industries account for 56% of the total annual average parish jobs in 2023. That share was 50% in 2019, 49.9% in 2018 and 49.6% in 2017. It remains unclear whether Covid-19 altered the concentration of these key industries with respect to jobs, but the pre-Covid share remained relative stable for the years preceding the pandemic.

The section of Table 4 identifying the top ten industries with their employment with the top average pay shows a disturbing trend with a smaller number of jobs in the top ten average pay industries in the parish. The total number of jobs in these sectors was about 3.9% of the total parish wide QCEW jobs in 2023. In 2012, that fraction was 11.8%. **This is another indicator of the narrowing of the economic structure of the parish.** Noteworthy is the fact that in 2012 and among the top ten paying industries, there were 1,369 jobs in NAICS 213 (Support Services in Mining). In 2023, the annual average was 161. Wholesale Traders and Brokers (NAICS 425) went from 1,868 in 2012 to 677 in 2023, according to QCEW data. Telecommunications (NAICS 517) jobs fell from 1,372 jobs to 787. The only sector showing growth in these high-end jobs was NAICS 325, Chemicals, going from 641 in 2012 to 725 in 2023.

Table 5 below shows the top ten private sector employment industries in Jefferson Parish for the years 2023 and 2019. The tables illustrate the dramatic decline in both total QCEW jobs, and the impact on food and drinking places (NAICS 722) of the Covid-19 lockdown and slow recovery of jobs in that industry. One obvious outcome of the comparison of the top ten industries in Jefferson Parish with respect to employment is the further concentration of jobs into a smaller number of total industries. In 2019, (not so long ago) fifty percent (50%) of the total QCEW jobs in the parish were concentrated in the top ten job industries. In 2023, the fraction had increased to fifty-six percent (56%). **This tells us that in a short period of time, the parish job economy had become more concentrated in fewer industries and less diversified.**

Table 5
Top Ten Annual Average QCEW Jobs in Jefferson Parish for the Years 2023 and 2019
2023

NAICS	INDUSTRIES	EMPLOYMENT	ANNUAL AVERAGE PAY
10	Total, all industries	167,765	\$62,143
722	Food services and drinking places	17,146	\$24,073
622	Hospitals	13,598	\$93,362
561	Administrative and support services	12,796	\$43,709
621	Ambulatory health care services	12,535	\$65,165
541	Professional, scientific, and technical services	10,515	\$81,993
238	Specialty trade contractors	7,074	\$66,436
423	Merchant wholesalers, durable goods	5,442	\$88,315
455	General merchandise retailers	5,064	\$28,831
524	Insurance carriers and related activities	4,839	\$93,373
445	Food and beverage retailers	4,361	\$30,140

2019

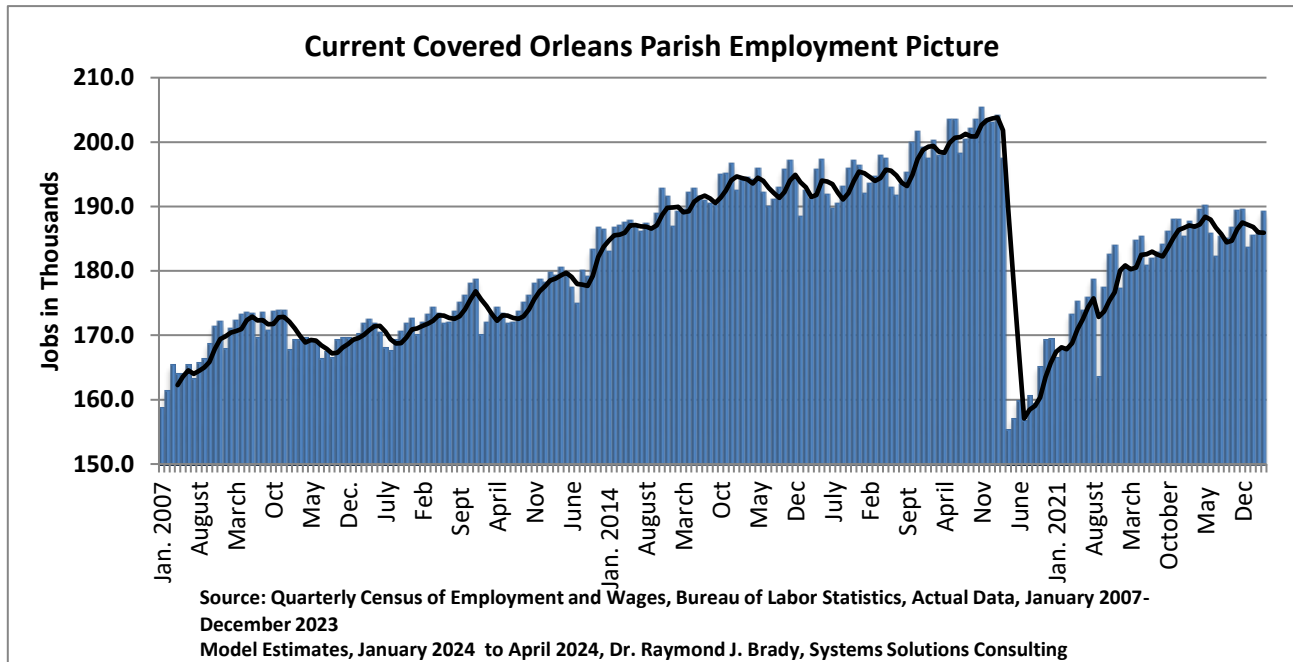
NAICS	INDUSTRIES	EMPLOYMENT	ANNUAL AVERAGE PAY
10	Total, all industries	189,845	\$50,999
722	Food services and drinking places	19,032	\$18,571
561	Administrative and support services	12,864	\$34,134
621	Ambulatory health care services	12,722	\$56,046
622	Hospitals	11,476	\$77,618
541	Professional and technical services	9,878	\$71,784
238	Specialty trade contractors	8,481	\$56,378
524	Insurance carriers and related activities	5,582	\$79,703
423	Merchant wholesalers, durable goods	5,428	\$70,440
452	General merchandise stores	5,333	\$24,268
445	Food and beverage stores	4,231	\$23,528

Source: Quarterly Census of Employment and Wages, Bureau of Labor Statistics, Annual Averages

Employment Change from 2007 to April 2024: Orleans Parish

Table 6 shows Orleans Parish time series QCWQ employment data from January 2007 to April 2024. The data series maps the impact of the Covid-19 Pandemic on the New Orleans job economy.

Table 6



Orleans Parish economy was hit hard by the Covid-19 pandemic, losing almost 24% of its January 2020 employment base or almost 48,000 QCEW jobs between January 2020 and April 2020. The economy began an immediate recovery in May, but partly because of necessary health restrictions the economy only recovered about 14,300 QCEW jobs of the 48,000 lost between January and April 2020. In 2021, the parish recovered another 14,000. Between January and December 2022, job growth added 10,600 QCEW jobs. **As of April 2024, Orleans Parish job numbers were still nearly 14,800 fewer than in February 2020.**

Table 7 illustrates the devastation the pandemic brought to the Leisure and Hospitality industry in New Orleans. Leisure and Hospitality accounted for 47% of the gross losses (counting only losses in the total) in New Orleans between the 4th quarter of 2019 and the 4th quarter 2023. Just as alarming is the loss of jobs in Administrative and Waste Services. Although still in economic recovery, the results of the pandemic may result in a restructuring of the hospitality industry. One potential impact of the Covid-19 health crisis would be further introduction of digital technology into this industry impacting employee demand and restructuring the roles of employees in the industry. Administrative and Support Services is another industry potentially affected by the pandemic through restructuring the demand for labor. Employers may be increasingly substituting digital technologies that affect demand for support services jobs. It remains to be seen whether technology will further invade the occupational structure of this industry.

Table 7
Covid 19 Pandemic Impact on Orleans Parish Job Economy
4th Quarter 2019 to 4th Quarter 2023

	4 th Quarter 2019	4 th Quarter 2023	Change
ORLEANS PARISH (TOTAL JOBS)	203,931	188,403	-15,528
Accommodation and food services	42,898	35,349	-7,549
Information	5,298	3,525	-1,773
Retail trade	14,824	13,320	-1,504
Public administration	12,846	11,694	-1,152
Administrative and waste services	12,670	11,694	-976
Management of companies and enterprises	3,078	2,125	-953
Arts, entertainment, and recreation	6,910	6,335	-575
Educational services	23,807	23,291	-516
Mining	1,592	1,110	-482
Other services, except public administration	6,131	5,656	-475
Construction	4,397	3,979	-418
Wholesale trade	3,532	3,312	-220
Transportation and warehousing	8,882	8,670	-212
Finance and insurance	5,073	4,946	-127
Real estate and rental and leasing	3,134	3,021	-113
Professional and technical services	15,522	15,499	-23
Utilities	1,153	1,144	-9
Agriculture, forestry, fishing and hunting	187	261	74
Manufacturing	4,408	4,695	287
Health care and social assistance	27,565	29,033	1,468

Source: Quarterly Census of Employment and Wages, Bureau of Labor Statistics

Table 8 looks at the long-term historical change in QCEW jobs between the 2nd quarter 2005 (prior to the August 2005 Hurricane Katrina disaster) and the 4th quarter 2023. The data suggests that New Orleans has structurally changed to a more narrowly focused job economy. It becomes clear that Accommodations and Food Services drives the economy of New Orleans, and that the Covid-19 pandemic may have lingering effects on this important sector. Simply subtracting (Table 8) the 4th quarter 2023 jobs in Accommodation and Food Services from the 4th Quarter 2019 shows that this sector still was down by over 7,500 jobs between these periods. As a positive note, Health Care and Social Assistance showed an increase between 4th quarter 2019 and 4th quarter 2023 illustrating the growing importance health care which serves as the underlying strength needed to keep the economy functioning.

Table 8
Historical Change in Jobs in Orleans Parish

	NAICS	Year 2005	Year 2023	Change 2nd Quarter 2005 to 4th Quarter 2023
		2nd Quarter	4th Quarter	
		Quarterly Employment	Quarterly Employment	
		244,151	188,403	
ORLEANS				-55,748
Professional and technical services	54	14,554	15,499	945
Agriculture, forestry, fishing and hunting	11	56	261	205
Utilities	22	1,894	1,144	-750
Real estate and rental and leasing	53	4,070	3,021	-1,049
Information	51	4,896	3,525	-1,371
Accommodation and food services	72	36,782	35,349	-1,433
Other services, except public administration	81	7,227	5,656	-1,571
Construction	23	6,128	3,979	-2,149
Arts, entertainment, and recreation	71	8,641	6,335	-2,306
Management of companies and enterprises	55	4,631	2,125	-2,506
Wholesale trade	42	5,999	3,312	-2,687
Mining	21	4,181	1,110	-3,071
Health care and social assistance	62	32,291	29,033	-3,258
Finance and insurance	52	8,384	4,946	-3,438
Manufacturing	31-33	8,573	4,695	-3,878
Transportation and warehousing	48-49	13,687	8,670	-5,017
Administrative and waste services	56	16,682	11,431	-5,251
Educational services	61	28,578	23,291	-5,287
Public administration	92	17,186	11,547	-5,639
Retail trade	44-45	19,195	13,320	-5,875

Source: Quarterly Census of Employment and Wages, Bureau of Labor Statistics

Table 9 presents the top ten employment industries, and the top ten industries with the highest pay in 2023. The top ten employers in the City of New Orleans accounted for 56% of total annual average employment (184,100 jobs) in that year. The top section of the table also illustrates that private sector QCEW jobs in New Orleans are concentrated in three broad NAICS sectors: (a) Food and Drinking Places (NAICS 722), (b) Educational Services (NAICS 611) and (c) Professional and Technical Services (NAICS 541) and accounted for 56,602 jobs.

The top ten sectors with the highest average pay in 2023 accounted for 4.1% of the total annual average jobs. Three of the top ten sectors with respect to pay were concentrated in Oil and Gas Extraction (NAICS 211), Securities, Commodities Contracts (NAICS 523) and Electronic Wholesale Trade Agents and Brokers (NAICS 425). These sectors accounted for 24% of the jobs associated with the upper end of the wage and salary distribution.

Table 9
Orleans Parish Top Ten Private Sector Job Industries and Annual Pay Profile in 2023

TOP TEN JOB INDUSTRIES AND AVERAGE ANNUAL PAY			
NAICS		Jobs	Annual Pay
722	Food services and drinking places	25,851	\$30,944
611	Educational services	17,564	\$64,181
541	Professional, scientific, and technical services	14,600	\$102,516
561	Administrative and support services	10,340	\$51,776
621	Ambulatory health care services	9,385	\$72,360
721	Accommodation	9,369	\$46,290
622	Hospitals	9,007	\$73,599
624	Social assistance	4,354	\$39,331
711	Performing arts, spectator sports, and related i	2,773	\$38,919
445	Food and beverage retailers	2,766	\$27,910
	Total Jobs and Weighted Average Pay	106,009	\$57,461
TOP TEN AVERAGE PAY INDUSTRIES AND CORRESPONDING JOBS			
		Jobs	Annual Pay
523	Securities, commodity contracts, and other finance	770	\$215,023
425	Wholesale trade agents and brokers	319	\$151,130
325	Chemical manufacturing	166	\$128,127
221	Utilities	255	\$123,211
336	Transportation equipment manufacturing	333	\$121,429
518	Computing infrastructure providers, data process	477	\$120,824
522	Credit intermediation and related activities	2,194	\$119,898
519	Web search portals, libraries, archives, and other	113	\$117,977
513	Publishing industries	604	\$116,777
551	Management of companies and enterprises	2,116	\$106,431
	Total Jobs and Weighted Average Pay	7,347	\$127,489

Source: Quarterly Census of Employment and Wages, Bureau of Labor Statistics

Table 11 presents job data for the top ten industries in the year 2020 and 2019. Again, illustrating pre-Covid job data and post-Covid job data.

Employment Change from 2007 to April 2024: St. Tammany Parish

St. Tammany Parish QCEW jobs shrunk by 12,900 between January 2020 and April 2020, due to the Covid-19 health crisis. In January 2020, the Quarterly Census of Employment and Wages (QCEW) program of BLS reported 90,200 jobs. That number contracted to 77,300 by April of 2020. The parish began its recovery in May of that year. It continued to add jobs, recovering 11,700 of the jobs lost by December 2020. In December of 2020, the parish had 89,000 QCEW jobs. **By October 2021, the QCEW jobs has recovered to the pre-pandemic level in February 2020.** Between the annual average for 2022 and 2023, QCEW jobs increased by 2,600 jobs. Between April 2023 and April 2024, parish employment was estimated to have increased by 2,700 QCEW jobs. The April 2024 estimate was 97,200. Table 10 shows the trend over this period.

Table 10

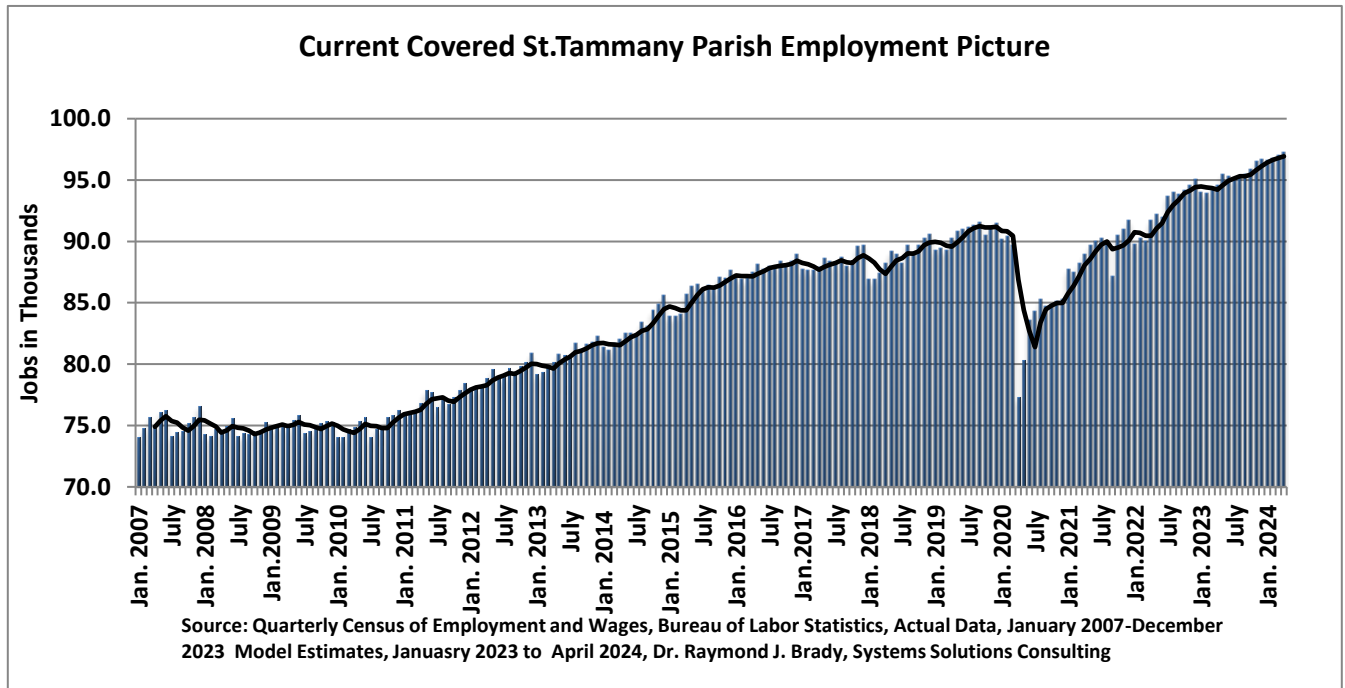


Table 11 presents data between the 4th quarter 2019 and the 4th quarter 2023 from the Quarterly Census of Employment and Wages (QCEW) and shows the distribution of jobs in the era of Covid-19. The parish weathered the lockdown and slow recovery rather well compared to Jefferson and Orleans Parish. For example, 4th quarter 2020 data for St. Tammany is 3% lower than the 4th quarter 2019. In Jefferson, 4th quarter 2020 shows a 6.4% lower jobs level than in the 4th quarter 2019. Orleans Parish 4th quarter 2020 jobs were 17.1% below the 4th quarter 2019 level. Table 12 also shows that Construction, Professional and Technical Services and Retail Trade recovered or exceeded the 4th quarter 2019 level. The table also shows that job growth in the parish is concentrated in three industry sectors: Professional and Technical Services, Construction and Finance and Insurance. Table 11 also shows that between the 4th quarter 2019 and the 4th quarter 2023, the parish economy had added 5,301 QCEW jobs, with Health Care and Social Assistance adding the most jobs. This was followed by Professional and Technical Services job additions. Up to April 2024 and among the three parishes in this paper is the only parish where total job levels have recovered back to the pre-Covid employment level.

Table 11
Covid 19 Pandemic Impact on St. Tammany Parish Job Economy
4th Quarter 2019 to 4th Quarter 2023

	4 th Quarter 2019	4 th Quarter 2023	Change
ST. TAMMANY (TOTAL JOBS)	91,076	96,377	5,301
Health care and social assistance	17356	19,195	1,839
Professional and technical services	5,137	5,993	856
Administrative and waste services	3873	4,385	512
Finance and insurance	2,967	3,321	354
Transportation and warehousing	3,355	3,701	346
Other services, except public administration	2446	2,786	340
Accommodation and food services	11516	11,838	322
Construction	5,807	6,108	301
Manufacturing	3,044	3,260	216
Arts, entertainment, and recreation	1637	1,797	160
Wholesale trade	4,148	4,305	157
Real estate and rental and leasing	970	1,085	115
Information	999	1,070	71
Public administration	3168	3,232	64
Agriculture, forestry, fishing and hunting	159	122	-37
Utilities	356	313	-43
Retail trade	13523	13,375	-148
Management of companies and enterprises	1524	1,338	-186
Mining	1,250	869	-381
Education Service	*	*	*

Source: Quarterly Census of Employment and Wages, Bureau of Labor Statistics; * = suppressed

Table 12 below presents job data over a longer period to better understand growth during the post-Katrina era. St. Tammany was minimally damaged by Hurricane Katrina, and the table shows that the top three job growth sectors are linked mostly to local serving industries, driven by population growth. Between 2005 and 2023 (July 1 estimates by Census Bureau) St. Tammany added 58,200 residents to its population 2005 population base. In fact, without the population growth of St. Tammany, the New Orleans MSA would probably have lost even more population over this period. ***As of July 1, 2005, New Orleans MSA population 1,386,429. As of July 1, 2023, the estimate was 1,237,748 or a loss of 148,681 residents. Every MSA parish, except for St. Tammany, had a population decline between July 2005 and July 2023.***

Table 12
Historical Change in Jobs in St. Tammany Parish

	NAICS	Year 2005	Year 2023	Change 2nd Quarter 2005 to 4th Quarter 2023
		2nd Quarter	4th Quarter	
		Quarterly Employment	Quarterly Employment	
ST. TAMMANY		67,706	96,377	28,671
Health care and social assistance	62	11,967	19,195	7,228
Accommodation and food services	72	7,859	11,838	3,979
Professional and technical services	54	3,201	5,993	2,792
Administrative and waste services	56	2,097	4,385	2,288
Wholesale trade	42	2,613	4,305	1,692
Construction	23	4,521	6,108	1,587
Transportation and warehousing	48-49	2,196	3,701	1,505
Retail trade	44-45	11,966	13,375	1,409
Manufacturing	31-33	1,919	3,260	1,341
Other services, except public administration	81	1,771	2,786	1,015
Finance and insurance	52	2,379	3,321	942
Arts, entertainment, and recreation	71	1,026	1,797	771
Mining	21	196	869	673
Public administration	92	2,819	3,232	413
Management of companies and enterprises	55	973	1,338	365
Agriculture, forestry, fishing and hunting	11	138	122	-16
Real estate and rental and leasing	53	1,127	1,085	-42
Utilities	22	427	313	-114
Information	51	1,307	1,070	-237
Educational services	61	*	*	*

**Source: Quarterly Census of Employment and Wages, Bureau of Labor Statistics; Louisiana Workforce Commission
Education data suppressed to prevent disclosure.**

Table 13 identifies the top ten job industries in the parish, and the top ten average pay industries. The top ten job industries account for 46% of total QCEW jobs in the parish in 2023. The weighted average pay for the sum of these industries was 76% of the unweighted average pay for all industries. The top pay industries in the parish accounted for 6.2% of the total QCEW jobs in 2023, and the weighted average pay of the ten pay industries was 155% above the parish wide average of (\$58,227) in 2023. As has been observed in other parishes in this survey, the fraction of very high pay jobs as a percentage of total jobs has declined over time.

Table 13
St. Tammany Parish Top Ten Private Sector Job Industries and Annual Pay Profile in 2023

TOP TEN JOB INDUSTRIES AND AVERAGE ANNUAL PAY			
NAICS		Jobs	Annual Pay
722	Food services and drinking places	11,222	\$21,566
621	Ambulatory health care services	7,496	\$66,344
541	Professional, scientific, and technical services	5,824	\$77,434
561	Administrative and support services	3,624	\$46,940
238	Specialty trade contractors	3,554	\$59,724
455	General merchandise retailers	2,915	\$27,907
445	Food and beverage retailers	2,455	\$28,604
624	Social assistance	2,452	\$26,796
622	Hospitals	2,430	\$63,676
623	Nursing and residential care facilities	2,260	\$41,466
	Total Jobs and Weighted Average Pay	44,232	\$43,965
TOP TEN AVERAGE PAY INDUSTRIES AND CORRESPONDING JOBS			
		Jobs	Annual Pay
211	Oil and gas extraction	464	\$288,760
551	Management of companies and enterprises	1,279	\$208,484
523	Securities, commodity contracts, and other finan	330	\$177,432
334	Computer and electronic product manufacturing	41	\$165,794
516	Broadcasting and content providers	14	\$151,592
481	Air transportation	11	\$124,456
425	Wholesale trade agents and brokers	601	\$119,971
488	Support activities for transportation	861	\$114,713
513	Publishing industries	138	\$114,408
423	Merchant wholesalers, durable goods	2205	\$103,340
	Total Jobs and Weighted Average Pay	5,944	\$148,721

Source: Quarterly Census of Employment and Wages, Bureau of Labor Statistics

Table 14 presents job data for the top ten industries in the year 2019 and 2023. The most obvious observation is the decline in QCEW jobs between the annual average job between these two periods. Ambulatory health care facilities (NAICS 621) and Professional and technical services (NAICS 541) remained in their second and third places in the ranking. With respect to Ambulatory care services, it indicates that these businesses either were concerned about loss of employees and kept them or demand for these services did not fall off. Professional and technical services increased their demand for employees indicating the importance of the output of these services, even with a pandemic.

Table 14
Annual Average QCEW Jobs in St. Tammany Parish for the Years 2019 and 2023

2023

NAICS	INDUSTRIES	EMPLOYMENT	ANNUAL AVERAGE PAY
10	Total	95,445	\$58,227
722	Food services and drinking places	11,222	\$21,566
621	Ambulatory health care services	7,496	\$66,344
541	Professional, scientific, and technical services	5,824	\$77,434
561	Administrative and support services	3,624	\$46,940
238	Specialty trade contractors	3,554	\$59,724
455	General merchandise retailers	2,915	\$27,907
445	Food and beverage retailers	2,455	\$28,604
624	Social assistance	2,452	\$26,796
622	Hospitals	2,430	\$63,676
623	Nursing and residential care facilities	2,260	\$41,466
423	Merchant wholesalers, durable goods	2,205	\$103,340

2019

NAICS	INDUSTRIES	EMPLOYMENT	ANNUAL AVERAGE PAY
10	Total, all industries	90,374	\$47,835
722	Food services and drinking places	10,951	\$16,728
621	Ambulatory health care services	6,545	\$59,316
541	Professional and technical services	4,967	\$67,216
561	Administrative and support services	3,443	\$38,343
238	Specialty trade contractors	3,403	\$49,540
452	General merchandise stores	2,963	\$23,797
624	Social assistance	2,316	\$19,871
622	Hospitals	2,303	\$54,800
445	Food and beverage stores	2,273	\$23,217
623	Nursing and residential care facili	2,028	\$30,992

Source: Quarterly Census of Employment and Wages, Bureau of Labor Statistics, Annual Averages

Finally, Table 15 presents the average calculated pay of the period 2004 to 2023. This level is calculated by BLS by dividing the sum of QCEW jobs into the sum of the payroll data.

Table 15

	Average Annual Pay (Current \$)				
	U.S	Louisiana	New Orleans MSA	New Orleans	Jefferson
Year 2004	\$39,354	\$31,880	\$34,487	\$36,877	\$32,549
2006	\$42,535	\$36,604	\$42,434	\$47,796	\$39,601
2007	\$44,458	\$38,229	\$43,255	\$48,163	\$40,612
2008	\$45,563	\$40,381	\$45,108	\$49,948	\$42,007
2009	\$45,559	\$40,579	\$45,121	\$49,514	\$42,390
2010	\$46,751	\$41,461	\$46,108	\$49,804	\$43,429
2011	\$48,043	\$42,380	\$46,827	\$49,844	\$44,560
2012	\$49,289	\$43,284	\$47,083	\$49,006	\$44,793
2013	\$49,804	\$44,011	\$47,509	\$48,810	\$44,668
2014	\$51,361	\$45,338	\$48,437	\$49,689	\$45,384
2015	\$52,937	\$45,919	\$49,492	\$50,157	\$46,733
2016	\$53,611	\$45,624	\$49,458	\$50,150	\$47,034
2017	\$55,375	\$46,498	\$50,488	\$51,018	\$48,203
2018	\$57,265	\$48,097	\$51,848	\$52,222	\$49,273
2019	\$59,219	\$49,297	\$53,245	\$53,691	\$50,999
2000	\$64,013	\$51,968	\$57,415	\$60,492	\$54,272
2021	\$67,610	\$53,886	\$59,469	\$62,546	\$56,663
2022	\$69,985	\$56,605	\$61,962	\$63,972	\$59,642
2023	\$72,357	\$59,058	\$64,555	\$65,185	\$62,028
Area Income 2010-2023 % Change	54.8%	42.4%	40.0%	30.9%	42.8%
Southern urban CPI % Change 2010-2023	40.3%				

Source: Quarterly Census of Employment and Wages, Bureau of Labor Statistics

Data for Orleans and Jefferson parishes for 2000 illustrates the impact of the Covid lockdown on the calculated average for each parish. Particularly for Orleans, the collapse of the Leisure and Hospitality industry with respect to average parish wide calculated pay shows a jump in the parish average pay between 2019 and 2020 well above the earlier years trend. Jobs. The statistical trend, based upon the times series data from 2004 to 2019, suggests a parish wide calculated pay level of \$54,280. However, as Table 5 shows the average based upon the number type of jobs in 2020 resulted in an average of \$60,492 (Orleans Parish). The Covid pandemic not only affected the lives of people, but it had a profound impact on economic data specifically when calculating sum averages based upon the distribution of employment and wages in 2020. Why? The industry most affected by Covid-19 has been the Leisure and Hospitality Industry. The U.S. annual average Leisure and Hospitality jobs fell by 3.6 million between 2019 and 2020. In Orleans Parish which (officially) showed a 12.7% increase in average pay and at the same time, showed a loss of 29,000 jobs between 2019 and 2020. The historical average increase was 2.5% compounded annually between 2004 and 2019. Orleans Parish's share of Leisure and Hospitality jobs in 2019 was 24%. In 2020, it fell to 17.2%. The weighted average pay *in this industry* in Orleans Parish was 53% of the parish wide pay total of \$53,691. In 2020 and because of the collapse of this industry employment, the ratio of average pay in Leisure and Hospitality (\$28,916) fell to 47.8% of the parish-wide average of \$60,492. In short, the decline in

Leisure and Hospitality jobs and corresponding lower level of pay associated with those jobs resulted in a distortion of the historical growth in the parish wide average. Why? As noted earlier, the calculated parish wide rose sharply because of the reduction *in the number of jobs in the bottom quartile of all jobs in terms of pay.*

Average pay data for 2023 shows a return to the long-term trend in the parish-wide growth in the calculated average pay for the U.S, Louisiana, the MSA, Orleans and Jefferson.

Increase in Average Pay in Select Areas for 2022 to 2023		
Area	Percentage Change	
U.S.	3.4%	
Louisiana	4.3%	
N.O.MSA	4.2%	
Orleans	1.9%	
Jefferson	4.0%	

CONCLUSION

This working paper updates and modifies information available from the 2019-2022 paper. Of particular interest is the impact of Covid-19 on the distribution of jobs in the target parishes, and its impact (the distribution) on the calculated average pay found in Table 5. The tables in this paper present information of the job profiles in each parish in a ranking format. Further, Table 1, 7 and 12 present the level of QCEW jobs in parish as of April 2023. Table 7 dramatically illustrates the impact of the Covid 19 Pandemic on the decline of jobs in Orleans Parish. Sixty-five percent (65%) of the job losses between 2019 and 2020 was concentrated Accommodation and Food Services (NAICS 72) and Arts, Entertainment and Recreation (NAICS 71). This speaks to the dependency of the local economy of this industry. The least affected parish, based upon this sample, was St. Tammany Parish by the pandemic. Without further analysis, the conjecture is that parish is more dependent on local serving industries, with continued population growth. As Table 1 illustrates, Jefferson Parish job change has been in a narrow band since 2007. The job economy realistically has been stagnant for a long period of time which might simply indicate that Orleans and Jefferson parishes are highly integrated from an economic perspective. Tables 3 and 9 points to the fact that the employment base of both parishes never recovered from Hurricane Katrina up to this date. **On might assign this lack of job and population recovery of these parishes to Hurricane Katrina (2005) or possibly this disaster simply accelerated internal historical weaknesses in these economies that began to appear in the late 1970s—well before the disaster of Hurricane Katrina.**