Current Employment Statistics Highlights

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Nonfarm payroll employment rose by 528,000 in July, led by job gains in leisure and hospitality, professional and business services, and health care. In July, total nonfarm employment recovered to its February 2020 level from losses totaling 22.0 million in March and April 2020.

The seasonally adjusted employment change for May revised up from +384,000 to +386,000, and the change for June revised up from +372,000 to +398,000. Employment over these months is 28,000 higher than previously reported.

Average hourly earnings of all employees on private-sector payrolls rose by 15 cents, or 0.5 percent, in July. Over the year, hourly earnings have increased by 5.2 percent. In July, average weekly hours, at 34.6 hours, were unchanged.

**+122,000 Education and Health Services**

Health care added 70,000 jobs in July, but employment is 78,000 below its February 2020 level. Over the month, ambulatory health care services accounted for most of the job growth (+47,000), with hospitals (+13,000) and nursing and residential care facilities (+9,000) also contributing jobs. Social assistance added 27,000 jobs in July, with individual and family services contributing 19,000 of the job gain.

**+96,000 Leisure and Hospitality**

Employment in leisure and hospitality increased over the month (+96,000) but is 1.2 million below its February 2020 level. In July, food services and drinking places added 74,000 jobs, but employment in the industry is 635,000 below its February 2020 level.

**+89,000 Professional and Business Services**

Employment in professional and technical services increased by 47,000 in July and is
813,000 above its February 2020 level. Over the month, job growth occurred in architectural and engineering services (+13,000), in management and technical consulting services (+12,000), in scientific research and development services (+10,000), and in other professional and technical services (+7,000).

Management of companies and enterprises added 13,000 jobs in July, but employment in the industry is 25,000 below its February 2020 level.

**+57,000 Government**

Employment in government increased by 57,000 in July but is 597,000 below its February 2020 level. Over the month, employment increased in local government education (+27,000) and in federal government (+10,000).

**+32,000 Construction**

Employment in construction grew by 32,000 in July and has expanded by 82,000 above its February 2020 level. Specialty trade contractors added 22,000 jobs in July.

**+30,000 Manufacturing**

Employment in manufacturing increased by 30,000 in July and has expanded by 41,000 above the February 2020 level. Over the month, employment in durable goods grew by 21,000.

**+21,000 Transportation and Warehousing**

Transportation and warehousing added 21,000 jobs in July, with gains in air transportation (+7,000) and support activities for transportation (+6,000). Employment in transportation and warehousing is 745,000 above its February 2020 level.
+7,000 Mining and logging
Mining employment grew by 7,000 in July, with support activities for mining (+4,000) and oil and gas extraction (+2,000) accounting for most of the gain.
Employment in mining increased by 7,000 in July, with gains concentrated in support activities for mining (+4,000) and in oil and gas extraction (+2,000). Mining has added 96,000 jobs since an employment trough in February 2021.

Recent strength in mining employment has coincided with an increase in the count of North American rotary rigs and a high average weekly price of West Texas Intermediate crude oil, although the price was down over the month.
Employment in construction grew by 32,000 in July and has expanded by 82,000 above its February 2020 peak.\(^1\) Over the past 12 months, construction has added an average 26,000 jobs per month.

In July, specialty trade contractors added 22,000 jobs, with gains split between the residential (+11,000) and nonresidential (+10,000) components. Employment in residential specialty trade contractors has expanded 132,000 above its February 2020 level, while employment in nonresidential specialty trade contractors is 53,000 lower.

These trends are in line with sharp increases in residential construction spending since February 2020 and recent declines in nonresidential construction spending.
Employment in manufacturing grew by 30,000 in July and is 41,000 above its February 2020 level.

The manufacturing 1-month diffusion index increased 5.4 points to 66.9. A number above 50 indicates that more manufacturing industries are adding jobs than are losing jobs.

Despite more widespread growth as measured by the diffusion index, both the ISM Manufacturing Purchasing Managers’ Index (PMI) and the S&P Global US Manufacturing PMI declined in July.

Average weekly hours of all employees remained unchanged at 40.4 hours in July. Production employees’ average workweek, at 41.1 hours, was little changed (+0.1 hour). Average weekly overtime hours for all employees increased by 0.1 to 3.3 hours. Overtime hours for production workers fell by 0.1 hour to 4.0 hours in July.
Employment in wholesale trade changed little (+11,000) in July, compared to an average monthly gain of 19,000 over the prior 6 months. Employment in wholesale trade is 21,000 lower than its February 2020 level.

Employment in durable goods is 20,000 above its February 2020 level, although employment is 30,000 lower in nondurable goods and 11,000 lower in electronic markets and agents and brokers.
Employment in retail trade increased in July (+22,000), but has shown little net change over the past 4 months. Since February 2020, industry employment is up by 208,000.

In July, employment increased in food and beverage stores (+9,000) and in general merchandise stores (+8,000).

Retail related-economic indicators are mixed. Retail Sales and Auto Sales both increased in June, and the per gallon price of regular gasoline decreased in July. Conversely, the Consumer Confidence Index decreased in July.
Employment in transportation and warehousing grew by 21,000 in July and is 745,000 above its February 2020 level.

In July, employment gains were concentrated in air transportation (+7,000) and support activities for transportation (+6,000).
Employment in utilities was flat in July and has shown little net change since February 2020 (-6,000).
Employment in information continued to trend up in July (+13,000) and is 117,000 above its February 2020 level.

In July, job gains were concentrated in other information services (+7,000), such as news clipping services, stock photo agencies, and telephone-based information services.
Employment in financial activities continued to trend up in July (+13,000) and is 95,000 above its February 2020 level.

In July, commercial banking added 5,000 jobs, and securities and commodities added 6,000 jobs.
Employment in professional and business services increased by 89,000 in July and has expanded by 986,000 above its February 2020 level.

In July, professional and technical services added 47,000 jobs, with gains in architectural and engineering services (+13,000), management and technical consulting services (+12,000), scientific research and development services (+10,000), and other professional and technical services (+7,000). Management of companies and enterprises added 13,000 jobs over the month, and office administrative services added 7,000.

Employment in temporary help services changed little in July (+10,000) and is 244,000 above its February 2020 level.
Employment in health care increased by 70,000 in July and is 78,000 below its February 2020 level.

In July, job gains were concentrated in ambulatory health care services (+47,000), with offices of other health practitioners (+16,000) and offices of dentists (+10,000) adding jobs. Elsewhere in health care, hospitals added 13,000 jobs, and nursing and residential care facilities added 9,000.

Within social assistance, employment in individual and family services increased by 19,000 over the month and is 74,000 above its February 2020 level.
Leisure and hospitality added 96,000 jobs in July. The industry has regained 7.0 million jobs since April 2020, but employment is 1.2 million lower than in February 2020.

In July, average hourly earnings for all employees in leisure and hospitality rose 12 cents to $20.22 and are up 8.7 percent over the year.

Food services and drinking places added 74,000 jobs in July but employment is 635,000 below its February 2020 level.
Employment in other services changed little in July (+15,000) and is 251,000 below its February 2020 level.

In July, personal and laundry services added 11,000 jobs.
Employment in government increased by 57,000 in July but is 597,000 below its February 2020 level.

In July, job gains were concentrated in local government education (+27,000) and in federal government (+10,000).
¹ The Current Employment Statistics program for national estimates designates cyclical peaks and troughs in time series of employment, hours, and earnings. Generally, the period between a peak and a trough must be at least 6 months in duration. (See https://www.bls.gov/ces/tables/peak-trough.htm for more details.) The extreme magnitude and dispersion of job losses across nearly all industries warrants treating the shorter downturn as a cyclical peak-to-trough phase that occurred primarily from February to April 2020. This determination mirrors a similar decision made by the business cycle dating committee of the National Bureau of Economic Research (NBER) to designate the episode as a recession, even though the downturn was briefer than earlier contractions. (For more information, see https://www.nber.org/news/business-cycle-dating-committee-announcement-july-19-2021.)