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Report - March 2020

A Blow to the Boroughs: Many Industries Hit Hardest by Coronavirus Concentrated Outside Manhattan

With the novel coronavirus already devastating New York City's economy, many of the industries suffering the most—including restaurants, retail, personal care services, childcare services, and air transportation—are overrepresented in Brooklyn, Queens, the Bronx, and Staten Island and have grown fastest outside Manhattan.

by Jonathan Bowles and Charles Shaviro

The coronavirus pandemic is wreaking havoc on nearly every segment of New York City's economy. But more so than previous recessions, the current crisis is likely to have a particularly devastating economic impact on the four boroughs outside Manhattan. This analysis shows that many of the industries suffering the most catastrophic early setbacks from efforts to contain the virus—including restaurants, retail, personal care services, childcare services, and air transportation—are overrepresented in Brooklyn, Queens, the Bronx, and Staten Island. Recent growth trends may have exacerbated these vulnerabilities: While the city's decade-long economic boom resulted in significant job growth across the city, a larger share of the job gains outside Manhattan were in these hard-hit industries.

The four boroughs' economic vulnerability in this crisis may also be heightened by their limited success in growing jobs in office sectors, which—at least for now—have not been as severely disrupted by ongoing efforts to enforce social distancing and are more likely to enable working from home. At the same time, Manhattan is far from insulated. The borough is home to a large share of the city's accommodations jobs, as well as thousands of jobs in arts and entertainment—from museums and Broadway to movie theaters and concert halls—all of which are immediately at risk. In addition, office sectors like finance, advertising, and media will undoubtedly suffer losses in the weeks and months ahead, as overall economic activity slows worldwide. But even amid these challenges, our analysis suggests that Brooklyn, Queens, the Bronx, and Staten Island may suffer deeper losses than in prior recessions.

Our analysis of employment data reveals:

The four boroughs outside Manhattan are overrepresented in many of the industries most vulnerable to the coronavirus pandemic.

- Nearly one in five jobs in the boroughs outside Manhattan (19.3 percent) is in the retail and restaurant sectors, both of which are facing catastrophic economic losses. By comparison, the two sectors make up just 15.2 percent of private sector jobs in Manhattan. On Staten Island, nearly a quarter of all private sector jobs (23.8 percent) are in restaurants and retail. Brooklyn has the next-highest share of its jobs in these sectors (19.2 percent), followed by Queens (18.8 percent), the Bronx (18.7 percent), and Manhattan (15.2 percent).
- ?In 2019, these two sectors—restaurants and retail—employed 311,470 people outside of Manhattan. More than half (54.6 percent) of all retail jobs citywide and 39.3 percent of all positions at restaurants and bars were located in the four boroughs outside Manhattan.
- Nail salons, beauty parlor, barber shops, and other personal care services are also experiencing dramatic losses due to efforts to contain coronavirus, and a large share of these jobs are located outside Manhattan. The four boroughs outside Manhattan are home to 59.5 percent of all jobs at the city's barber shops, 58.2 percent of jobs in nail salons, and 38.5 percent of positions at beauty salons. On Staten Island, the personal care services sector—which includes nail salons, beauty salons, and barbers—accounts for 1.8 percent of all private sector jobs in the borough, more than double the share in Manhattan (0.8 percent).
- In the childcare services sector, which is also reeling as daycares close or face dwindling enrollment amid social distancing, more than three-quarters (76.6 percent) of all jobs citywide are located outside Manhattan. Brooklyn alone accounts for 37.4 percent of all child care positions citywide, while Queens has 24.6 percent of the city's child care jobs, the Bronx has 10.2 percent, and Staten Island has 4.4 percent.
- The childcare services sector accounts for 1.8 percent of all jobs outside of Manhattan—more than four times the share in Manhattan (0.4 percent). The sector is responsible for 2.1 percent of employment in Brooklyn, 1.6 percent in Staten Island, and 1.5 percent in both Queens and the Bronx.
- The four boroughs outside Manhattan are home to 86.2 percent of all jobs citywide in the repair and maintenance sector, which includes shoe repair, consumer electronics repair, computer repair, car washes, and automotive maintenance. Many of these businesses are closed or cutting back hours in response to shrinking demand.
- Nearly all (96 percent) of the 31,868 air transportation jobs in the city are located outside Manhattan. In Queens, home to both city airports, the air transportation sector accounts for 3.9 percent of all jobs. Although the federal stimulus package includes funding to stabilize the nation's airline industry, travel and tourism will likely be disrupted for months to come.

More than a quarter of the recent job gains in the boroughs outside Manhattan have been in five sectors that figure to be among the hardest hit by efforts to contain the coronavirus.

- Over the past decade, 25.4 percent of all new private sector jobs added outside of Manhattan were in five sectors—restaurants, retail, childcare services, repair & maintenance, and personal care & laundry services—that are uniquely vulnerable in the current crisis. These five sectors accounted for just 22 percent of the job gains in Manhattan during the same period.
- ?Between 2009 and 2019, these five hard-hit sectors accounted for 26.1 percent of the job gains in Queens, 25.3 percent of the growth in Brooklyn, 24.8 percent in the Bronx, and 23.2 percent on Staten Island.
- In raw numbers, these five hard-hit sectors were responsible for 106,926 out of the 420,231 jobs added between 2009 and 2019 in the four boroughs outside Manhattan.

In addition to accounting for a disproportionate share of all jobs added in the boroughs, most of these hard-hit sectors have also been growing fastest outside Manhattan.

- At beauty salons, 85 percent of the employment gains were in the four boroughs outside Manhattan.
- In childcare services, 79 percent of the job growth was outside Manhattan.
- In retail, 63 percent of the job growth was outside Manhattan.
- At nail salons, 60 percent of the jobs added was in Brooklyn, Queens, the Bronx, and Staten Island.
- At restaurants, 43 percent of job gains occurred outside Manhattan.

Two other sectors that have a disproportionate share of jobs outside Manhattan—home healthcare and construction—may also be vulnerable to significant job declines.

- The home healthcare sector could experience job losses on a smaller scale due to efforts to reduce physical contact with older adults and other vulnerable clients. Home healthcare accounts for 10 percent of all jobs outside of Manhattan, compared to just 1.8 percent of positions in Manhattan. In Brooklyn, 14.3 percent of all jobs are in home healthcare. The share is slightly lower in Queens (8.3 percent) and the Bronx (5.7 percent), but still significantly higher than in Manhattan.
- ?Home healthcare accounted for 27.7 percent of all job gains in Brooklyn, Queens, the Bronx, and Staten Island during the past decade, compared to just 4.6 percent in Manhattan.
- The construction industry has thus far experienced relatively few job losses, but this could change now that Governor Cuomo has called off non-essential construction and as economic losses trigger a slowdown in new residential and commercial development. A contraction in the industry would disproportionately impact the boroughs outside Manhattan. Nearly three-quarters (72.1 percent) of the 156,000 construction jobs citywide are based in the four boroughs outside of Manhattan.
- The four boroughs outside of Manhattan accounted for 75 percent of the growth in construction jobs (28,784 out of the 38,372) between 2009 and 2019. In fact, the construction industry comprised 6.8 percent all job gains outside of Manhattan.

Manhattan also faces significant exposure to high-risk sectors, with jobs at the borough's hotels, museums, and entertainment venues particularly vulnerable to losses right now.

- Manhattan has, by far, the largest exposure to the hotel industry, which is already experiencing significant job losses due to the coronavirus crisis. Of the 52,555 accommodations jobs citywide, 87.4 percent are in Manhattan. However, the four other boroughs added hotel jobs at twice the rate of Manhattan over the past decade. From 2009 to 2019, accommodations jobs increased by 27 percent in Manhattan and by 63 percent in the four other boroughs, with Brooklyn (176 percent increase in hotel jobs), the Bronx (75 percent) and Queens (33 percent) growing at the fastest clip.
- Three-quarters (75.2 percent) of the jobs in the city's arts, entertainment and recreation sector are located in Manhattan. This includes 88.6 percent of the positions at performing arts companies; 69 percent of the jobs at museums, historical sites, zoos, and parks; 69.8 percent of jobs in the amusements, gambling, and recreation sector; and 65.6 of the city's independent artists, writers, and performers.

Office sectors have not yet sustained deep job losses as a result of social distancing policies put in place to stem the spread of coronavirus, and office workers are more likely than others to be able to work from home. But Brooklyn, Queens, the Bronx, and Staten Island still have relatively few office jobs.

- As of 2019, Manhattan is home to 82.8 percent of all jobs in the six office sectors we examined—information (North American Industry Classification System [NAICS] code 51); finance and insurance (NAICS 52); real estate and rental and leasing (NAICS 53); professional, scientific, and technical services (NAICS 54); management of companies (NAICS 55); and administrative and support and waste management, and remediation services (NAICS 56).

- Brooklyn has the second-largest share of office jobs (7.4 percent), followed by Queens (6.6 percent), the Bronx (2.3 percent), and Staten Island (0.9 percent)
- ?In raw numbers, Manhattan has 1.18 million of the 1.43 million office jobs citywide. Brooklyn is the only other borough with at least 100,000 office jobs (105,744), while Queens has 94,401, the Bronx has 32,353, and Staten Island has 12,926.

Brooklyn, Queens, the Bronx, and Staten Island accounted for nearly half (48 percent) of all private sector jobs created citywide over the past decade—but fewer than 20 percent of new office jobs.

- Manhattan accounted for 81 percent of the growth in office jobs between 2009 and 2019, or 245,441 out of the 303,235 new office jobs added citywide.
- Manhattan's share of employment growth was even greater in the office sectors with the highest salaries, such as information (97.6 percent of the sector's job growth was in Manhattan), finance and insurance (96.7 in Manhattan), and technology (90.4 percent).
- Of the 57,794 office jobs added in the four boroughs outside Manhattan, 61 percent were in Brooklyn. During this 10-year period, Brooklyn added 35,033 office jobs, which was more than Queens (19,750), the Bronx (2,668), and Staten Island (342) combined.
- Over the past decade, Brooklyn was the only borough to increase its overall share of the city's office jobs—going from 6.3 percent in 2009 to 7.4 percent in 2019. Over the same period, Queens' share stayed the same (6.6 percent), while the share declined in the Bronx (2.6 percent to 2.3 percent), Staten Island (1.1 percent to 0.9 percent) and Manhattan (83.3 percent to 82.8 percent).
- Queens has lost ground to Brooklyn in office jobs. In 2009, Queens was home to roughly 4,000 more office jobs than Brooklyn (74,651 to 70,710). Ten years later, Brooklyn has 11,000 more office than Queens (105,744 to 94,401). In the past decade, despite the strong economy, Queens actually experienced a decline in employment in finance and insurance (losing 275 jobs) and information (-627).
- The four boroughs outside Manhattan accounted for just 9.6 percent of the jobs created in the tech sector citywide during the past decade, but they captured a much larger share (21.1 percent) of the employment growth in the creative industries. The vast majority of the growth was in Brooklyn. Brooklyn accounted for 81 percent of the jobs added outside of Manhattan in the tech sector over the past decade, adding 6,653 jobs in the sector between 2009 and 2019—a 160 percent spike (from 4,148 jobs in 2009 to 10,801 in 2019). This was more than three times as many jobs as any of the other three boroughs.

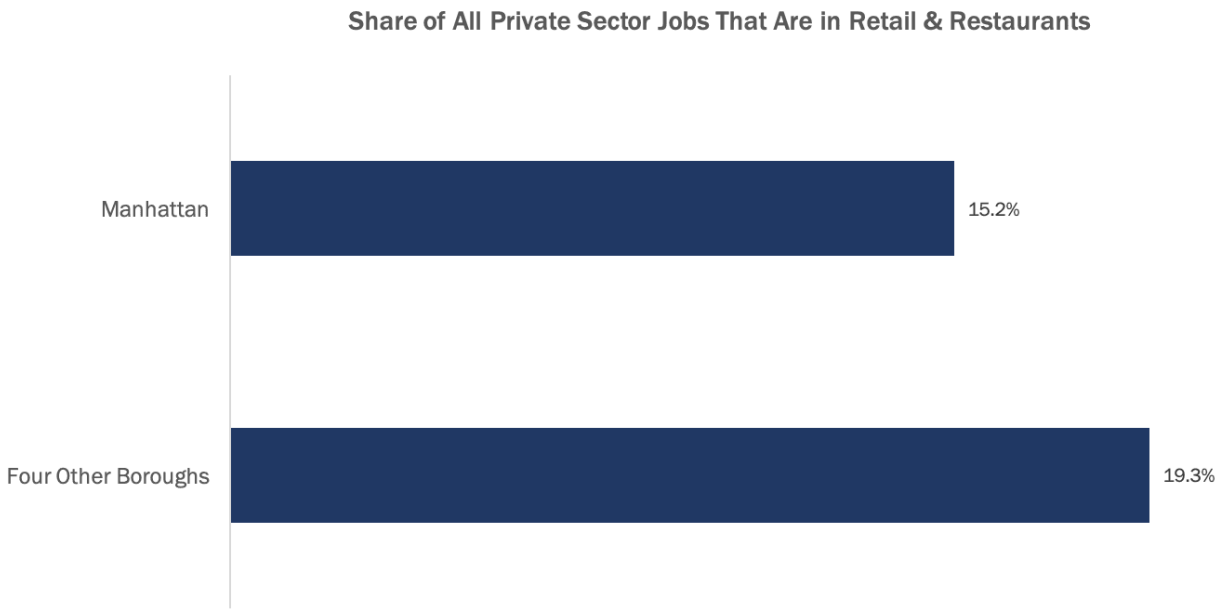
The boroughs' limited success in growing jobs in office sectors puts them at a disadvantage in the current economic crisis—and has also left them with fewer well-paying positions.

- Where the boroughs outside Manhattan did add office jobs, it was largely in the lowest-wage office sector.
- The administrative and waste services sector, which has the lowest average salary of any of the six major office sectors we examined ($63,354), accounted for 48 percent of the growth in office jobs outside of Manhattan—the largest share, by far, of any sector.
- In Queens, the Bronx, and Staten Island, more than half of all new office jobs created over the past decade were in the administrative and waste services sector. Administrative and waste services jobs accounted for 53 percent of office job growth in Queens (10,466 of the 19,750 office jobs created between 2009 and 2019). The sector accounted for 81.8 percent of all office job growth in the Bronx (2,182 out of 2,668).
- There was relatively little job growth outside of Manhattan in the higher-wage office sectors. Just 3.3 percent of the city's employment growth in finance and insurance between 2009 and 2019 occurred outside of Manhattan—and no borough other than Manhattan added more than 1,000 jobs. Brooklyn (+834 jobs) and the Bronx (+637) both gained jobs in finance and insurance while Staten Island (-325) and Queens (-275) experienced declines.

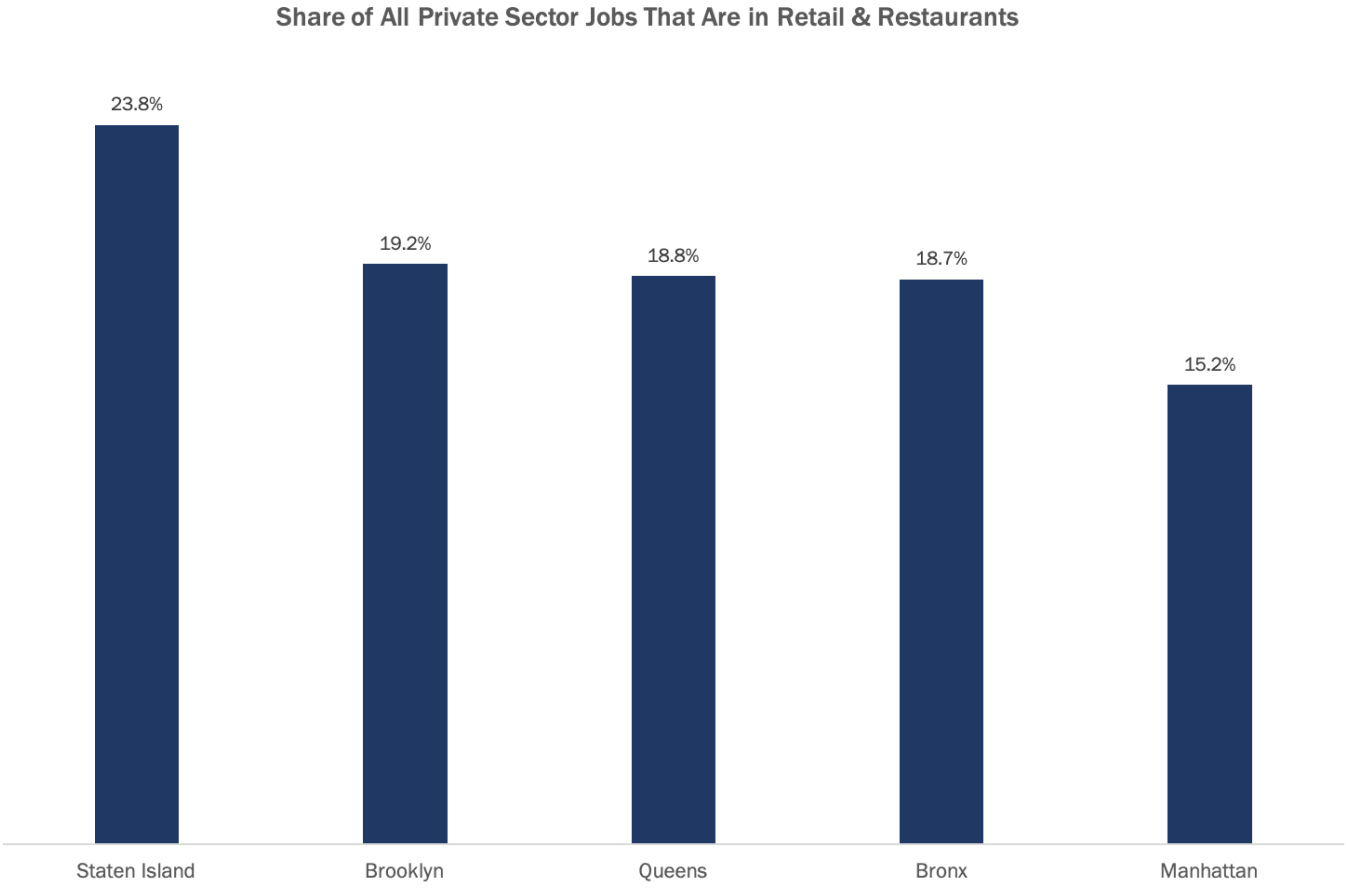
- The four boroughs outside of Manhattan accounted for just 2.4 percent of the 54,241 jobs added in the information sector. Brooklyn was the only borough to experience a net gain in information jobs during the decade, adding 4,479 jobs in the sector while the Bronx (which lost 1,791 jobs), Staten Island (-749), and Queens (-627) all experienced employment declines.

Methodology

This brief is based on an analysis of employment data from the U.S. Bureau of Labor Statistics (BLS) Quarterly Census of Employment and Wages (QCEW) for the second quarters of 2009 and 2019. In the analysis, “office jobs” includes all jobs in six macro sectors: information (North American Industry Classification System [NAICS] code 51); finance and insurance (NAICS 52); real estate and rental and leasing (NAICS 53); professional, scientific, and technical services (NAICS 54); management of companies (NAICS 55); and administrative and support and waste management, and remediation services (NAICS 56). These are same six macro sectors that the NYC Department of City Planning (DCP) defined as “office jobs” in its 2019 report about employment trends in the NYC metropolitan region. To add further detail, we also analyzed employment growth in the tech sector, the creative economy, and a number of specific industries within the tech and creative fields. In this report, we measured employment in the “tech sector” by tallying the following tech subsectors: electronic shopping; Internet publishing and web search portals; computer systems design and related services; data processing, hosting and related services; software publishers; and scientific research and development services. We measured employment in the creative economy through an analysis of the following creative industries: architectural services, landscape design, drafting services, interior design, industrial design services, other specialized design services, art galleries, graphic design, advertising agencies, photography studios (portrait), commercial photography, motion picture & video industries, sound recording industries, publishing industries (except Internet), and marketing consulting services.



Source: CUF analysis of data from the Quarterly Census of Employment and Wages.



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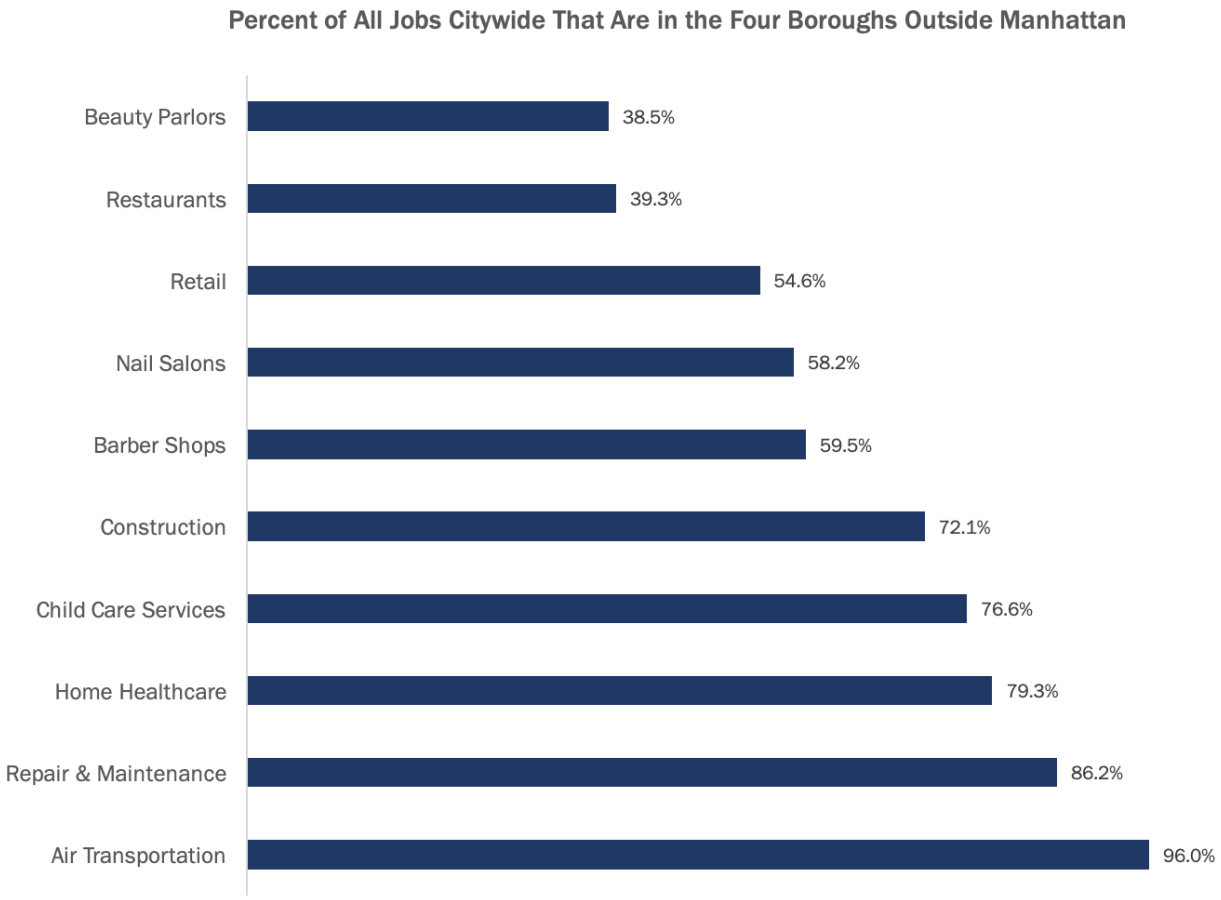

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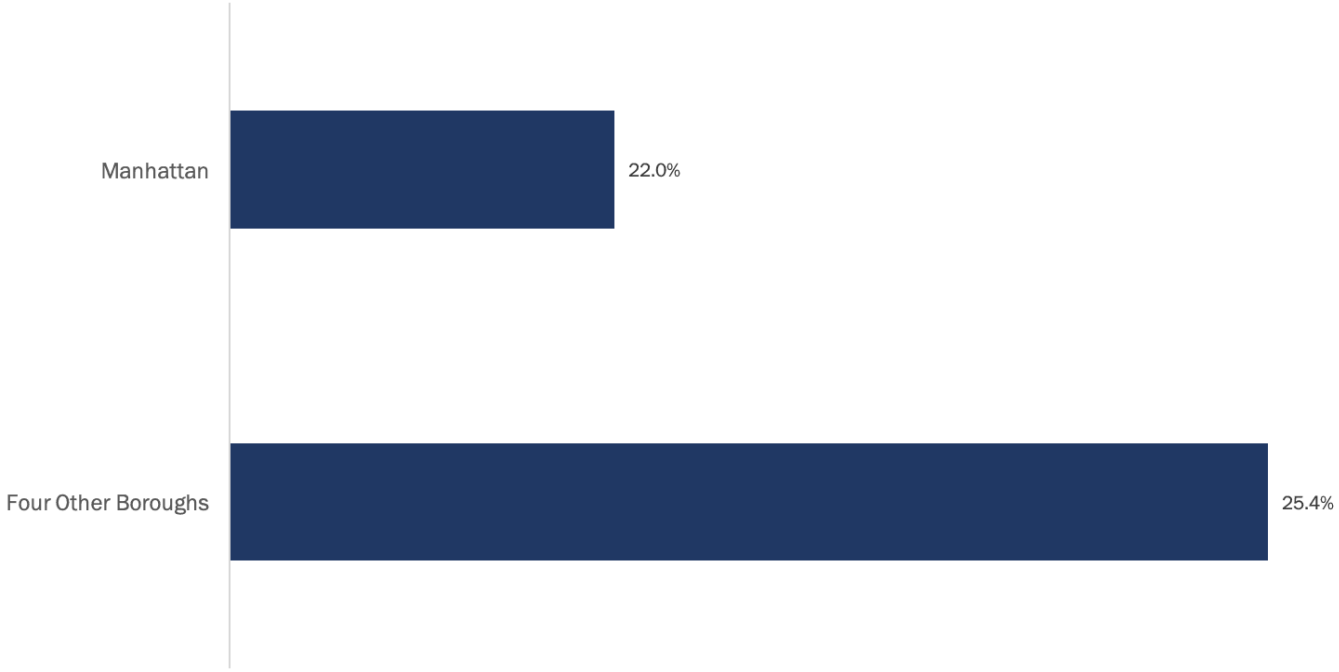
Percent of All New Jobs Added From 2009 - 2019 That Were in Five Sectors That Are at High Risk Due to Coronovirus Pandemic



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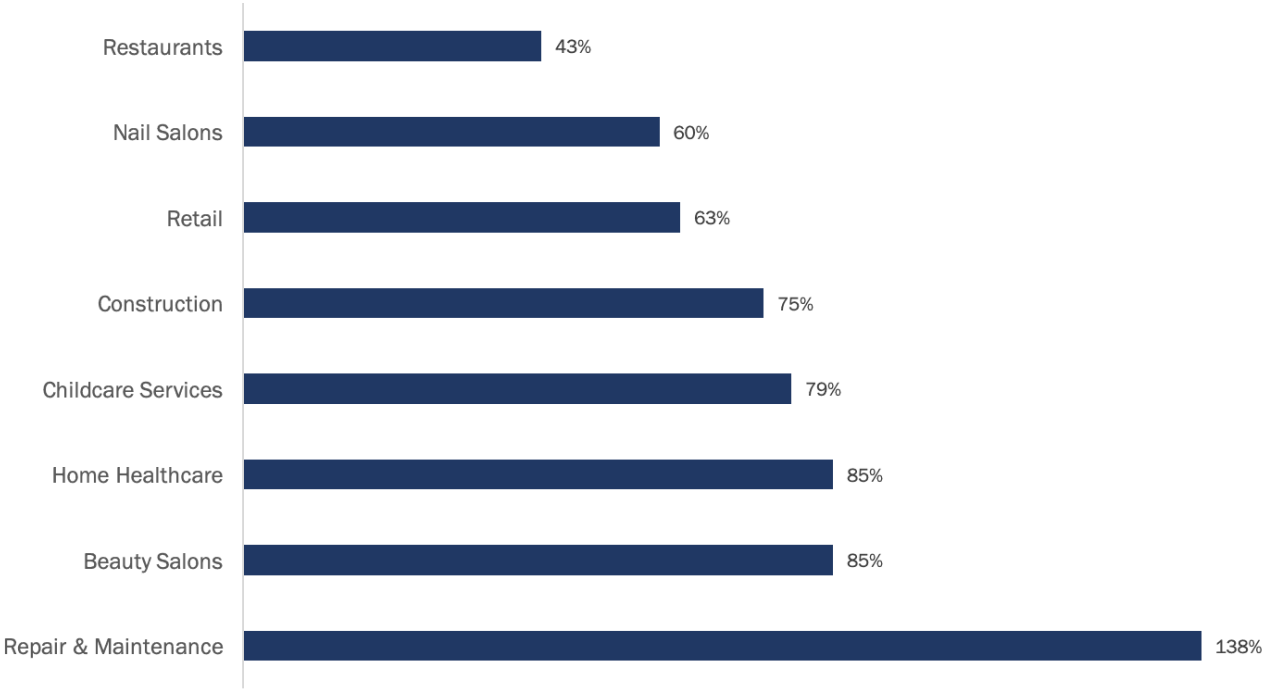
Percent of Sector's Job Growth From 2009-2019 That Occurred Outside of Manhattan



Source: CUF analysis of data from the Quarterly Census of Employment and Wages.

Note: In the repair and maintenance sector, 138 percent of the job growth occurred outside of Manhattan because the four boroughs outside Manhattan experienced a net gain of 1,319 jobs while Manhattan had a net loss of 365 positions.

Retail Trade - Job Growth 2009-2019

Borough	2009 Jobs	2019 Jobs	Job Growth 2009-2019	% Job Growth 2009-2019
MANHATTAN	133176	153917	20741	16%
BROOKLYN	56146	76328	20181	36%
QUEENS	52954	62434	9479	18%
BRONX	25003	30605	5602	22%
STATEN ISLAND	15166	15972	806	5%
NYC	282,445	339,255	56,810	20%

Food Services and Drinking Places - Job Growth 2009-2019

Borough	2009 Jobs	2019 Jobs	Job Growth 2009-2019	% Job Growth 2009-2019
MANHATTAN	125303	194453	69150	55%
BROOKLYN	23305	51919	28614	123%
QUEENS	31776	49511	17735	56%
BRONX	12317	15997	3680	30%
STATEN ISLAND	6799	8705	1906	28%
NYC	199,500	320,585	121,085	61%

Nail Salons - Job Growth 2009-2019

Borough	2009 Jobs	2019 Jobs	Job Growth 2009-2019	% Job Growth 2009-2019
MANHATTAN	1686	4069	2383	141%
BROOKLYN	807	2237	1430	177%
QUEENS	757	2205	1448	191%
BRONX	263	633	370	141%
STATEN ISLAND	263	582	319	121%

Nail Salons - Job Growth 2009-2019

Borough	2009 Jobs	2019 Jobs	Job Growth 2009-2019	% Job Growth 2009-2019
NYC	3,777	9,727	5,950	158%

Beauty Salons - Job Growth 2009-2019

Borough	2009 Jobs	2019 Jobs	Job Growth 2009-2019	% Job Growth 2009-2019
MANHATTAN	8921	9221	299	3%
BROOKLYN	1487	2168	682	46%
QUEENS	1516	2305	789	52%
BRONX	374	461	87	23%
STATEN ISLAND	738	845	108	15%
NYC	13,035	15,000	1,965	15%

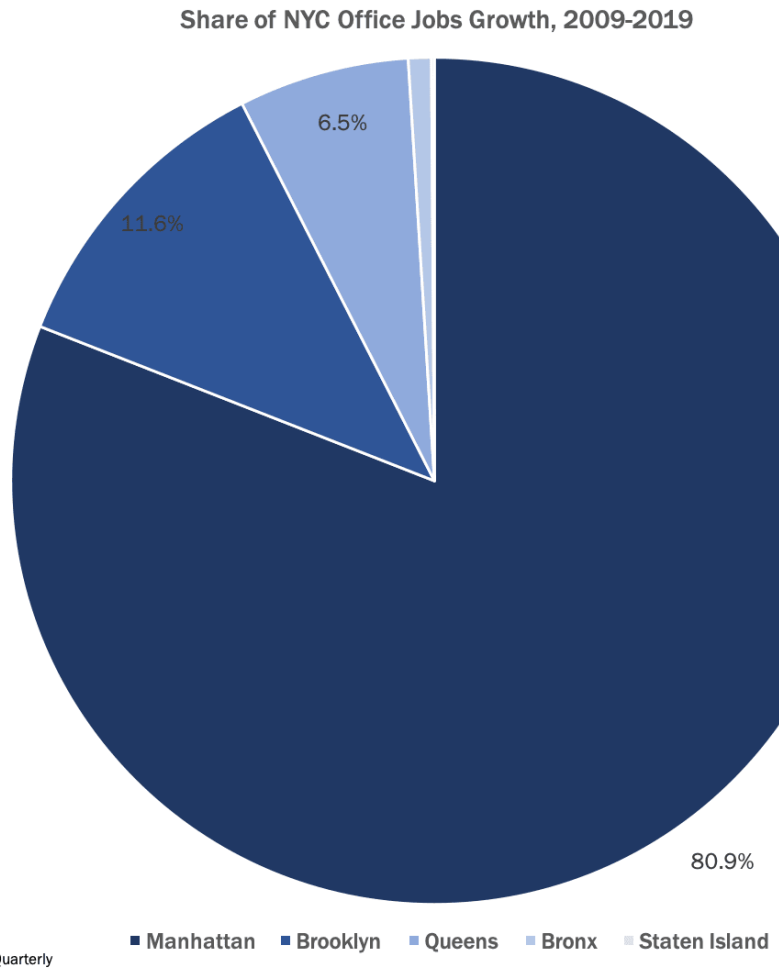
Barber Shops - Job Growth 2009-2019

Borough	2009 Jobs	2019 Jobs	Job Growth 2009-2019	% Job Growth 2009-2019
MANHATTAN	381	513	132	35%
BROOKLYN	83	380	297	358%
QUEENS	218	237	20	9%
BRONX	62	80	18	30%
STATEN ISLAND	24	56	32	132%
NYC	768	1,267	499	65%

Repair and Maintenance - Job Growth 2009-2019

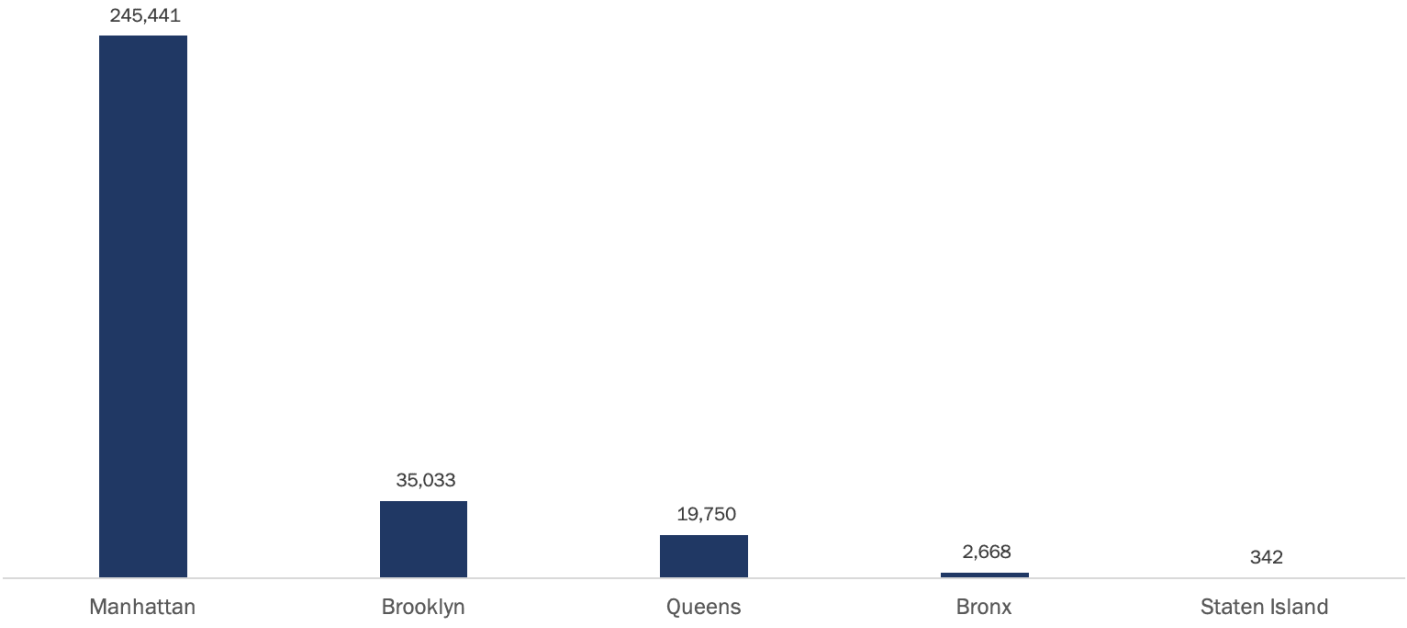
Borough	2009 Jobs	2019 Jobs	Job Growth 2009-2019	% Job Growth 2009-2019
MANHATTAN	2347	1981	-365	-16%
BROOKLYN	3713	3770	56	2%
QUEENS	4519	4968	449	10%

Repair and Maintenance - Job Growth 2009-2019				
Borough	2009 Jobs	2019 Jobs	Job Growth 2009-2019	% Job Growth 2009-2019
BRONX	1845	2428	583	32%
STATEN ISLAND	964	1194	230	24%
NYC	13,388	14,341	953	7%



Source: CUF analysis of data from the Quarterly Census of Employment and Wages.

Net Gain in Office Jobs, 2009-2019



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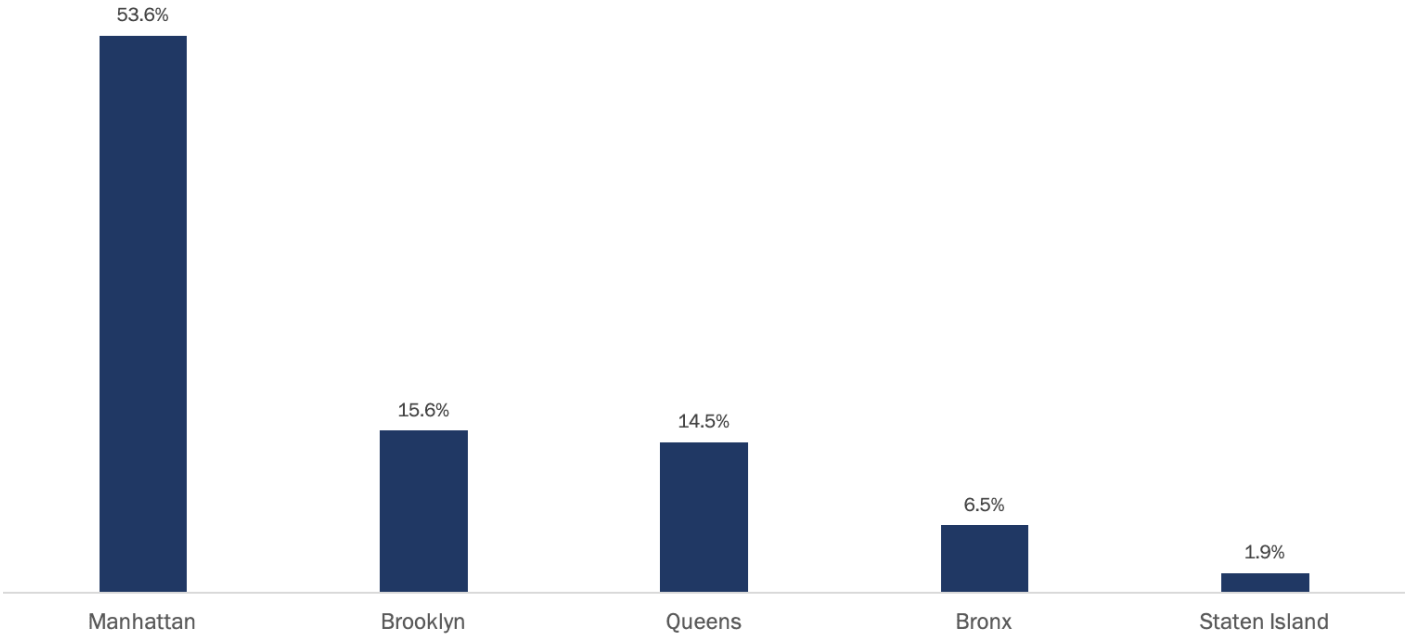
Office Jobs as a Share of All Private Sector Job Growth, 2009-2019



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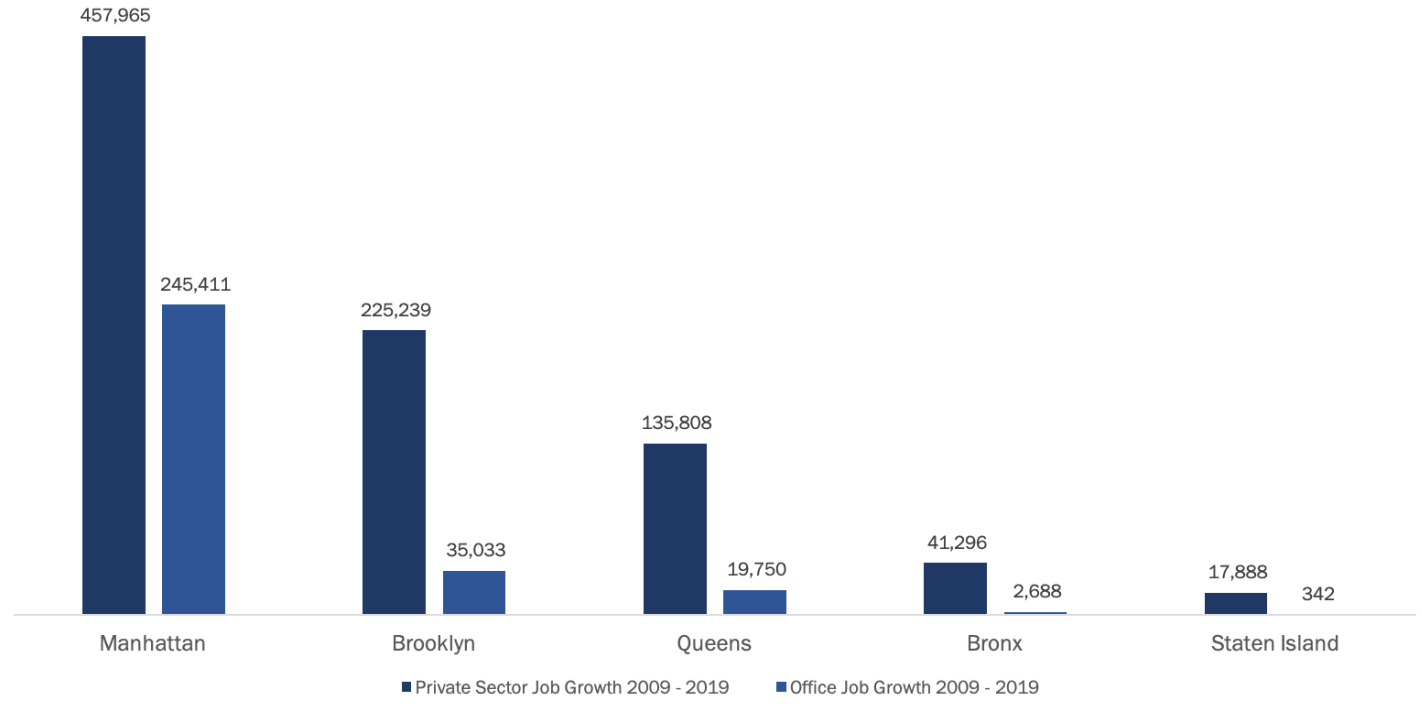
All Private Sector Job Growth vs Office Job Growth, 2009-19

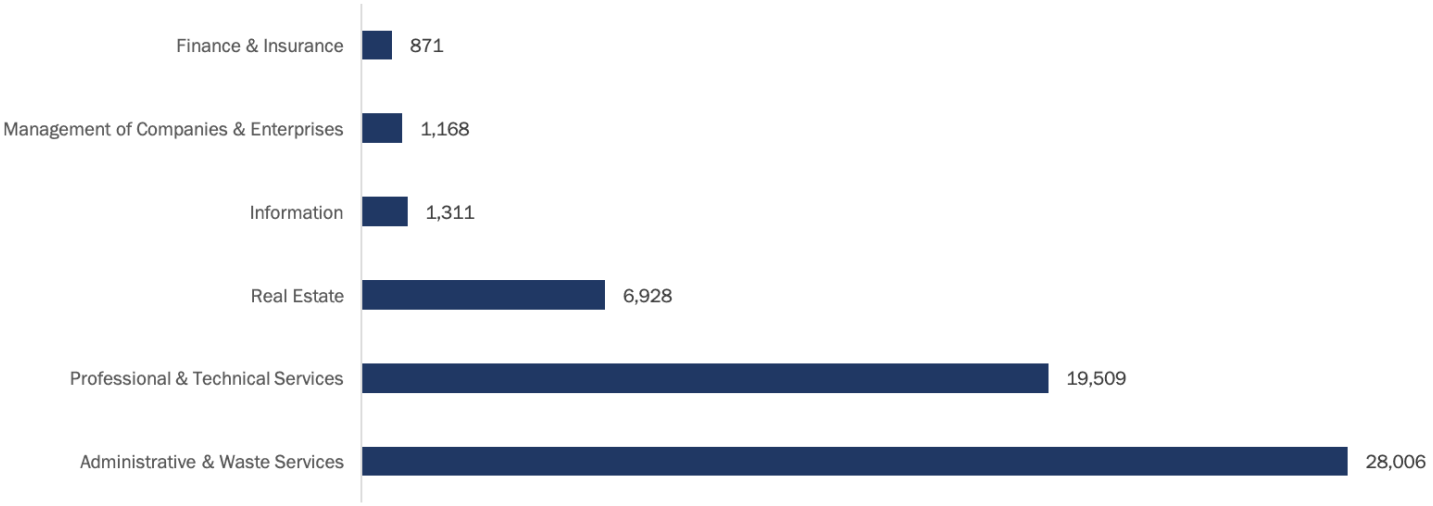


Source: CUF analysis of data from the Quarterly Census of Employment and Wages.

Manhattan Share of Job Growth by Office Sector, 2009-2019

Source: CUF analysis of data from the Quarterly Census of Employment and Wages.

Office Jobs Added in 4 Boroughs Outside of Manhattan, by Sector



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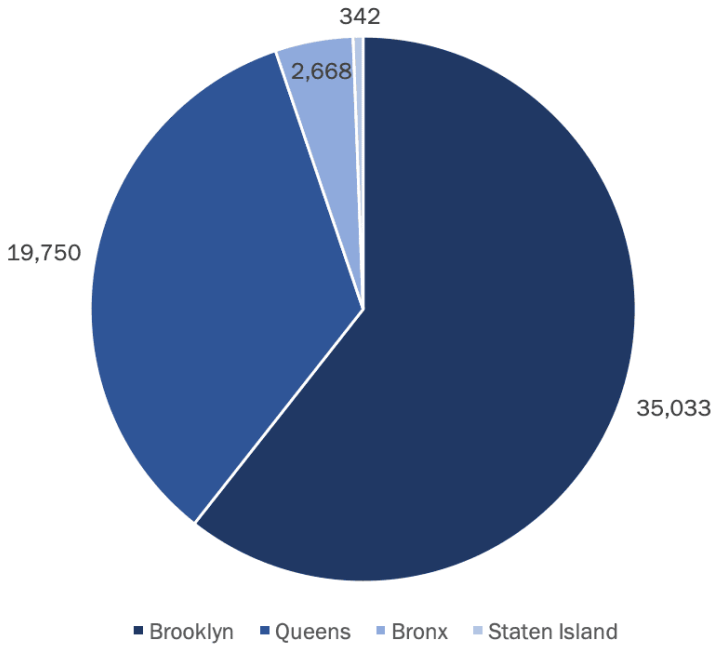
Office Jobs Added Outside of Manhattan, by Borough



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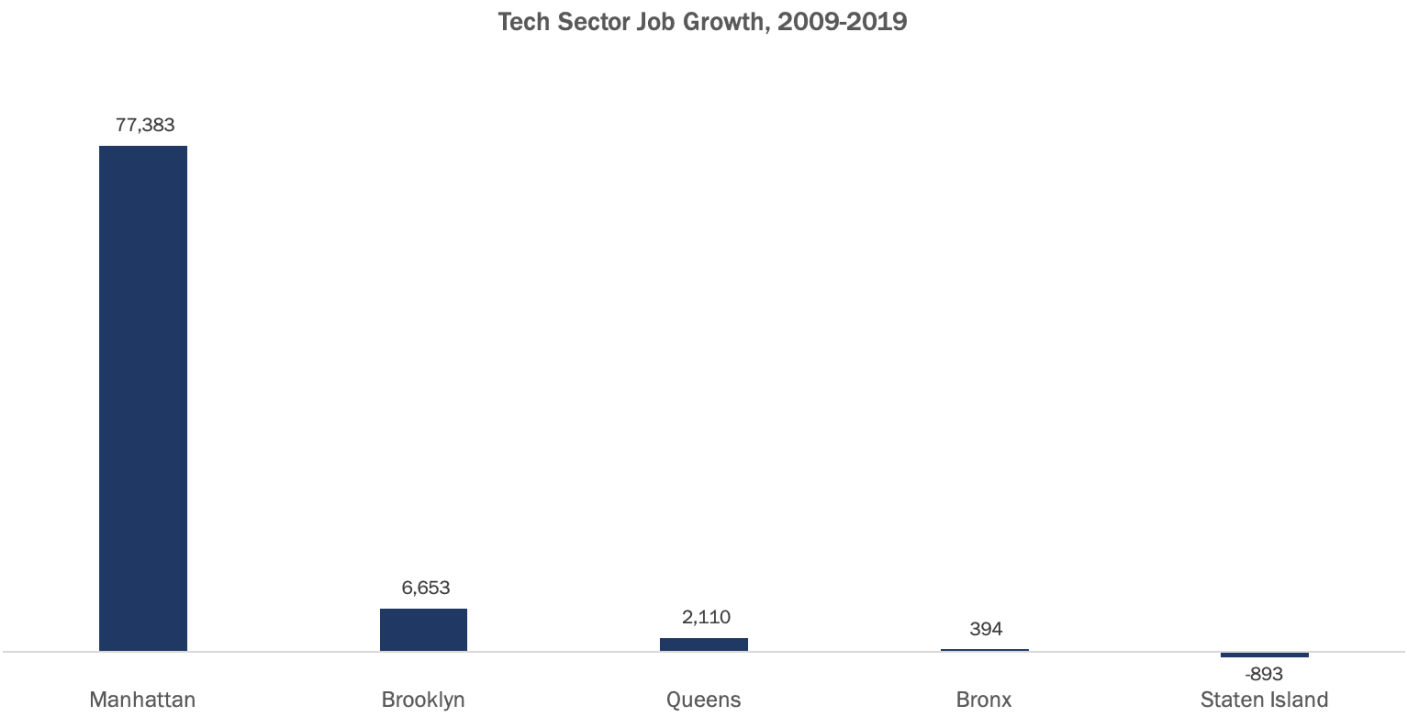

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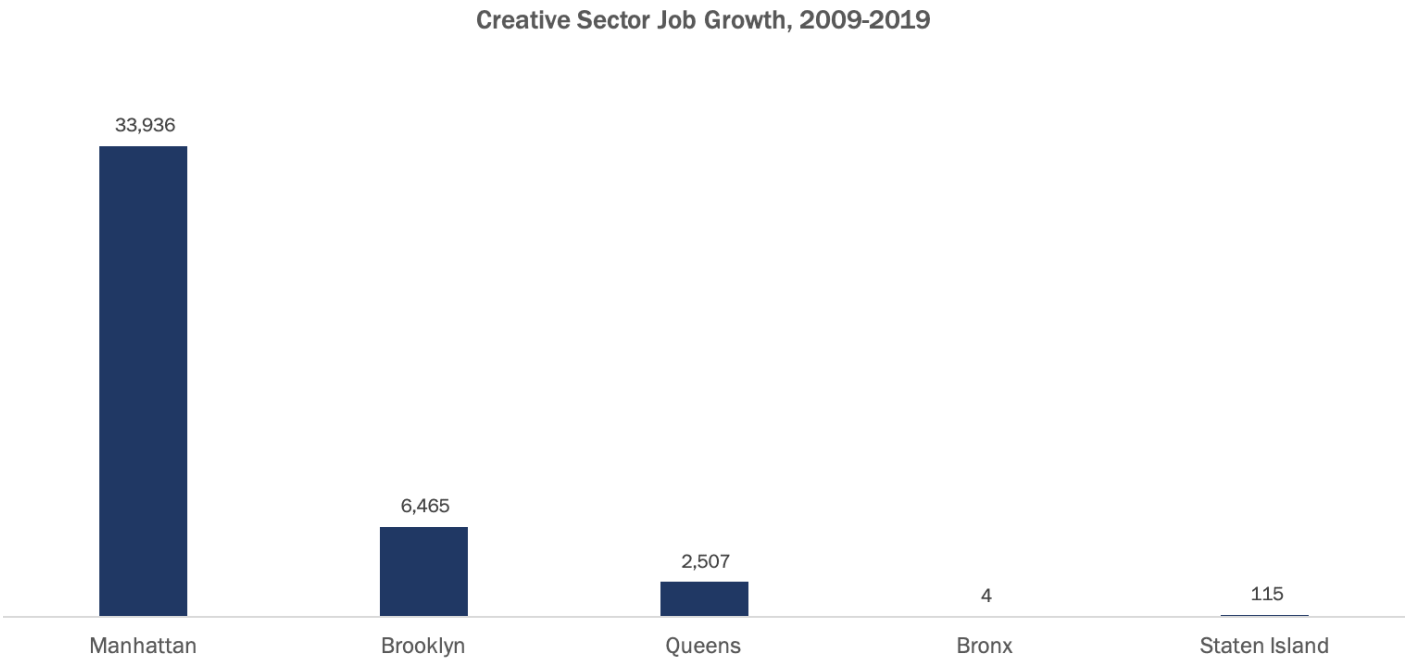

Source: CUF analysis of data from the Quarterly Census of Employment and Wages.

Office Job Growth, 2009-2019				
Borough	Total Office Jobs 2009	Total Office Jobs 2019	Office Job Growth 2009-2019	% Office Job Growth 2009-2019
MANHATTAN	938,603	1,184,044	245,441	26.1%

Office Job Growth, 2009-2019				
Borough	Total Office Jobs 2009	Total Office Jobs 2019	Office Job Growth 2009-2019	% Office Job Growth 2009-2019
BROOKLYN	70,710	105,744	35,033	49.5%
QUEENS	74,651	94,401	19,750	26.5%
BRONX	29,685	32,353	2,668	9.0%
STATEN ISLAND	12,584	12,926	342	2.7%
NYC	1,126,232	1,429,468	303,235	26.9%

Administrative & Waste Services - Job Growth 2009-2019				
Borough	2009 Jobs	2019 Jobs	Job Growth 2009-2019	% Job Growth 2009-2019
MANHATTAN	124,334	192,674	68,340	55.0%
BROOKLYN	18,723	32,693	13,970	74.6%
QUEENS	22,635	33,101	10,466	46.2%
BRONX	7,189	9,371	2,182	30.3%
STATEN ISLAND	2,886	4,273	1,388	48.1%
NYC	175,766	272,112	96,345	54.8%

Professional & Technical Services Sector - Job Growth 2009-2019				
Borough	2009 Jobs	2019 Jobs	Job Growth 2009-2019	% Job Growth 2009-2019
MANHATTAN	282,866	357,309	74,443	26.3%
BROOKLYN	13,681	24,609	10,928	79.9%
QUEENS	11,711	18,804	7,094	60.6%
BRONX	3,687	5,085	1,398	37.9%
STATEN ISLAND	3,468	3,557	89	2.6%

Professional & Technical Services Sector - Job Growth 2009-2019				
Borough	2009 Jobs	2019 Jobs	Job Growth 2009-2019	% Job Growth 2009-2019
NYC	315,413	409,365	93,952	29.8%

Finance & Insurance - Job Growth 2009-2019				
Borough	2009 Jobs	2019 Jobs	Job Growth 2009-2019	% Job Growth 2009-2019
MANHATTAN	272,521	298,353	25,832	9.5%
BROOKLYN	15,733	16,568	834	5.3%
QUEENS	15,636	15,361	(275)	-1.8%
BRONX	4,004	4,641	637	15.9%
STATEN ISLAND	2,258	1,933	(325)	-14.4%
NYC	310,152	336,855	26,703	8.6%

Information - Job Growth 2009-2019				
Borough	2009 Jobs	2019 Jobs	Job Growth 2009-2019	% Job Growth 2009-2019
MANHATTAN	127,781	180,710	52,930	41.4%
BROOKLYN	6,653	11,132	4,479	67.3%
QUEENS	8,770	8,143	(627)	-7.2%
BRONX	3,928	2,137	(1,791)	-45.6%
STATEN ISLAND	2,177	1,428	(749)	-34.4%
NYC	149,309	203,549	54,241	36.3%

Real Estate - Job Growth 2009-2019				
Borough	2009 Jobs	2019 Jobs	Job Growth 2009-2019	% Job Growth 2009-2019
MANHATTAN	77,579	88,415	10,836	14.0%
BROOKLYN	14,138	18,480	4,343	30.7%

Real Estate - Job Growth 2009-2019

Borough	2009 Jobs	2019 Jobs	Job Growth 2009-2019	% Job Growth 2009-2019
QUEENS	14,017	16,176	2,160	15.4%
BRONX	9,670	9,940	270	2.8%
STATEN ISLAND	1,039	1,195	156	15.0%
NYC	116,442	134,206	17,765	15.3%

Management of Companies & Enterprises - Job Growth 2009-2019

Borough	2009 Jobs	2019 Jobs	Job Growth 2009-2019	% Job Growth 2009-2019
MANHATTAN	53,522	66,583	13,061	24.4%
BROOKLYN	1,783	2,262	479	26.9%
QUEENS	1,882	2,816	933	49.6%
BRONX	1,207	1,179	(28)	-2.3%
STATEN ISLAND	757	540	(216)	-28.6%
NYC	59,151	73,380	14,230	24.1%

Tech Sector Job Growth, 2009-2019

Borough	2009	2019	Change 2009-2019	% Change 2009-2019
MANHATTAN	63,801	141,184	77,383	121.3%
BROOKLYN	4,148	10,801	6,653	160.4%
QUEENS	3,827	5,936	2,110	55.1%
BRONX	110	504	394	359.3%
STATEN ISLAND	1,300	407	(893)	-68.7%
NYC	73,186	158,832	85,647	117.0%

Creative Economy Job Growth, 2009-2019

Borough	2009	2019	Change 2009-2019	% Change 2009-2019
MANHATTAN	137,666	171,602	33,936	24.7%
BROOKLYN	3,465	9,930	6,465	186.6%
QUEENS	2,737	5,244	2,507	91.6%
BRONX	329	333	4	1.2%
STATEN ISLAND	688	804	115	16.8%
NYC	144,885	187,913	43,027	29.7%

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Center for an Urban Future (CUF) is an independent, nonprofit think tank that generates innovative policies to create jobs, reduce inequality and help lower income New Yorkers climb into the middle class. For 20 years, CUF has published accessible, data-driven reports on ways to grow and diversify the economy and expand opportunity that are anchored in rigorous research, not preconceived notions about outcome. Our work has been a powerful catalyst for policy change in New York City and serves as an invaluable resource for government officials, community groups, nonprofit practitioners and business leaders as they advocate for and implement policies to address some of New York's biggest challenges and opportunities.

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