

Contra Costa County

Employment Trends Report



Contra Costa County Overview

Similar to statewide trends, Contra Costa County's labor market growth has slowed over the last year. Total employment in the County rose by just 0.5%, trailing the state's growth rate of 1.0%. Payroll growth has remained positive due to a significant surge in the County's Health Care employment, which expanded by 6.4% year-over-year, just behind the state's 7.1% growth rate. Without these Health Care gains, employment levels in the County fell by 1.0% over the past year.

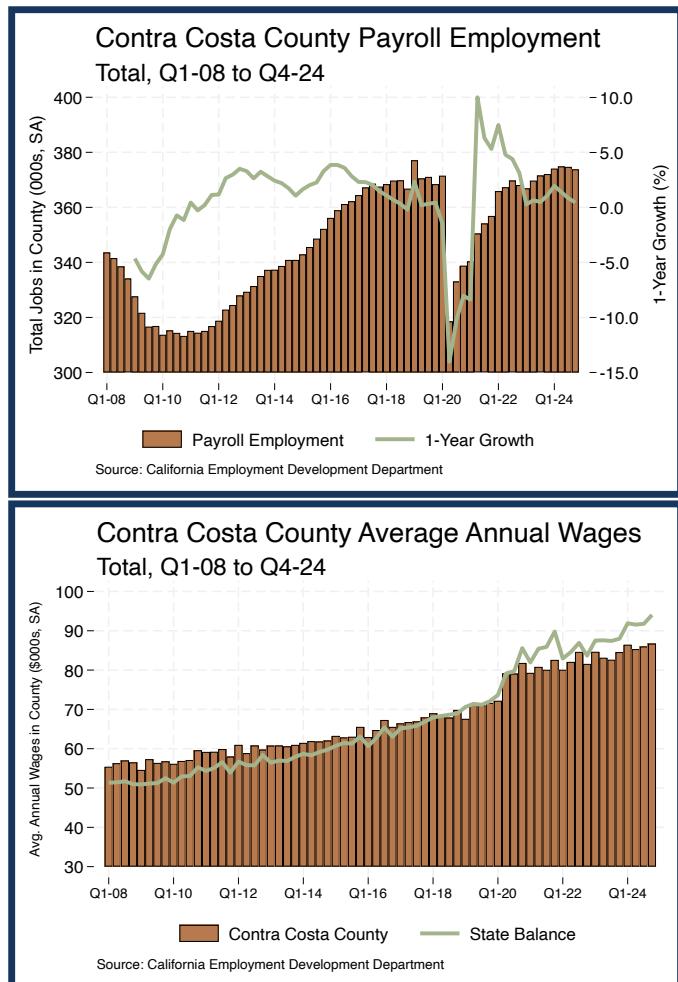
Gains in the Health Care sector are not surprising given Contra Costa County's aging population. The number of residents over the age of 65 grew by 53,014 from 2014 to 2024, a 33.6% increase; this compares to a 30.8% increase in this population in California overall. In addition, all of the County's major Health Care subsectors expanded over the last year, with Social Assistance and Nursing and Residential Care Facilities responsible for the majority of the job gains. Over the last five years, Health Care has expanded by 23.1% in the County, outpacing the state's 18.1% growth.

Payrolls in the Government sector in Contra Costa County expanded by 3.5% between the fourth quarter of 2023 and the fourth quarter of 2024, slightly more than the state's 3.2% growth rate. These recent gains have been fueled by the Local Government subsector. Payrolls in Transportation, Warehousing, and Utilities increased by 4.0% between the fourth quarter of 2023 and the fourth quarter of 2024, far outpacing the state's 0.4% growth rate. These gains were fueled by growth in the Warehousing and Storage and Truck Transportation subsectors.

Job losses have occurred in a handful of the County's major industries, but were most pronounced in Natural Resources and Construction, Retail Trade, and Manufacturing, which collectively shed over 3,700 jobs over the last year. In absolute terms, the largest losses occurred in Construction, driven primarily by a decline in the Specialty Trade Contractors and Construction of Buildings subsectors. Natural Resources and Construction, Manufacturing, and Retail Trade all contracted more than the state average.

Job growth in Contra Costa County has slowed sharply and has now turned negative, as projected in Beacon Economics' previous report. Data from the Bureau of Labor Statistics' Quarterly Census of Employment and Wages (QCEW) indicates that total employment across the County declined by 0.3% between the first quarter of 2024 and the first quarter of 2025 (latest available data), marking the first annual decline in four years.

Contra Costa County Employment Trends Report



Overview

- Payroll employment in Contra Costa County has grown 1.5% over the last five years, trailing the 3.1% increase in California as a whole over the same period.
- At the industry level, Health Care; Government; Transportation, Warehousing, and Utilities; Leisure and Hospitality; and Education added the largest number of jobs in Contra Costa County from the fourth quarter of 2023 to the fourth quarter of 2024.
- Wages in Contra Costa County grew by 2.6% from the fourth quarter of 2023 to the fourth quarter of 2024. This trails the 6.9% increase in California as a whole over the same period.
- At the industry level in Contra Costa County, Health Care; Transportation, Warehousing, and Utilities; Government; Education; and Leisure and Hospitality wages were the fastest growing from the fourth quarter of 2023 to the fourth quarter of 2024.
- Over the last year, employment growth was strongest at establishments employing fewer than four workers, with those payrolls growing by 7.1% from the fourth quarter of 2023 to the fourth quarter of 2024.
- Small businesses in Contra Costa County increased their payrolls by 0.7% from the fourth quarter of 2023 to the fourth quarter of 2024, outpacing the largely unchanged growth across all private industries.

Table 1: Establishment Births/Deaths

Year	Firm Births	Firm Deaths	Total Net Increase	Total Firms*
2020	860	472	+388	16,092
2021	862	665	+197	16,289
2022	1384	472	+912	17,201
2023	890	418	+472	17,673
2024	889	351	+538	18,211

*Establishments with 3 or more employees

Table 2: Employment in Q4-24 by Establishment Size

Establishment Type	Total Emp.	Growth Since Q4-23 (%)	Total Est.
Less than 4 Employees	36,421	7.1	23,126
4 to 9 Employees	39,098	1.3	5,672
10 to 49 Employees	108,469	-0.5	4,997
50 to 250 Employees	109,254	-1.2	1,133
More than 250 Employees	82,871	0.3	120

Employment Growth

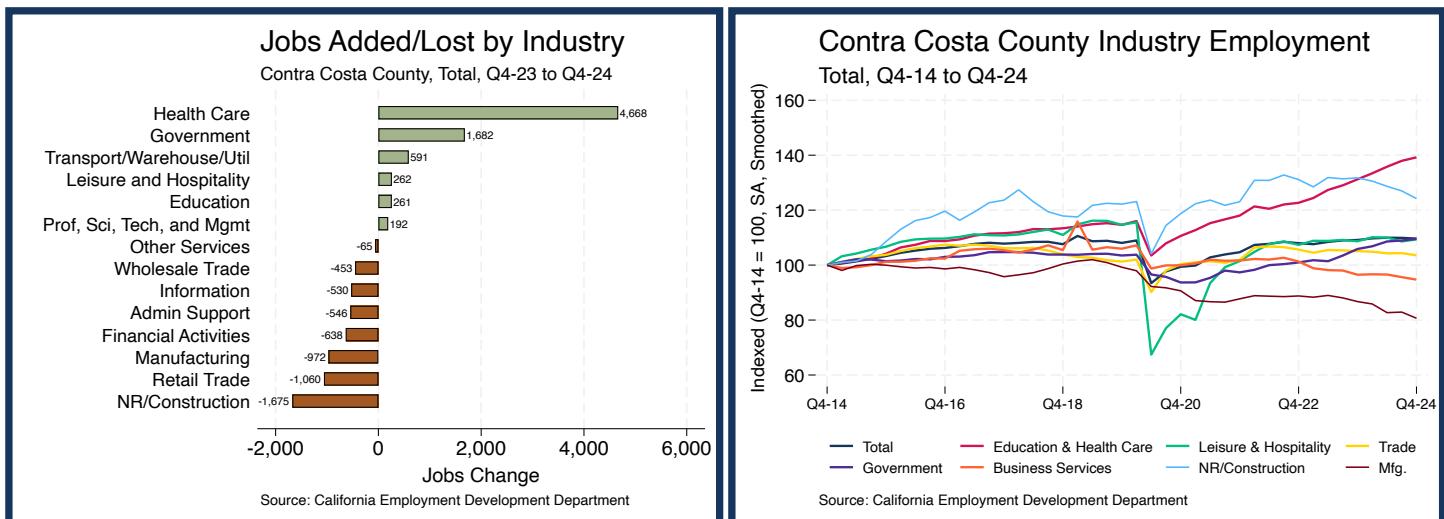


Table 3: Employment by Industry: Q4-24

Industry	Employ- ment (#)	1-Year Growth County (%)	1-Year Growth State (%)	5-Year Growth County (%)	5-Year Growth State (%)	County Location Quotient
Health Care	77.6	+6.4	+7.1	+23.1	+18.1	1.3
Leisure and Hospitality	40.7	+0.6	+0.2	-4.6	-0.1	1.0
Retail Trade	39.9	-2.6	-0.8	-3.8	-4.1	1.2
Prof, Sci, Tech, and Mgmt	30.7	+0.6	+2.8	-5.7	+5.6	0.9
NR/Construction	27.6	-5.7	-1.7	+1.7	-0.4	1.0
Financial Activities	22.6	-2.7	-0.9	-16.6	-5.7	1.4
Admin Support	22.4	-2.4	-1.4	-6.0	-4.5	1.0
Transport/Warehouse/Util	15.3	+4.0	+0.4	+34.3	+16.2	0.9
Other Services	13.1	-0.5	+0.6	+1.5	+6.5	1.1
Manufacturing	12.9	-7.0	-6.4	-18.7	-6.3	0.5
Education	8.2	+3.3	+2.9	+7.4	+11.5	1.1
Wholesale Trade	7.8	-5.5	-1.2	-10.9	-4.7	0.6
Information	5.0	-9.6	-1.2	-26.6	-4.3	0.5
Total Private	323.9	+0.0	+0.6	+0.8	+2.7	1.0
Government	49.9	+3.5	+3.2	+5.8	+6.0	0.9
Total	373.8	+0.5	+1.0	+1.5	+3.1	1.0

**Table 4: One-Year Employment Growth
Fastest Growing Subsectors with 250+ employees: Q4-24**

Subsector	Total Emp.	Growth (%)	Wage (\$000s)
Admin of Economic Programs	856	+37.1	71.6
Heavy and Civil Engineering Construction	4,259	+35.6	147.2
Warehousing and Storage	2,678	+33.6	109.4
Chemical Mfg	1,550	+29.1	122.9
Admin of Environmental Quality Programs	825	+14.9	79.9
Social Assistance	26,397	+12.7	34.0

Wage Growth

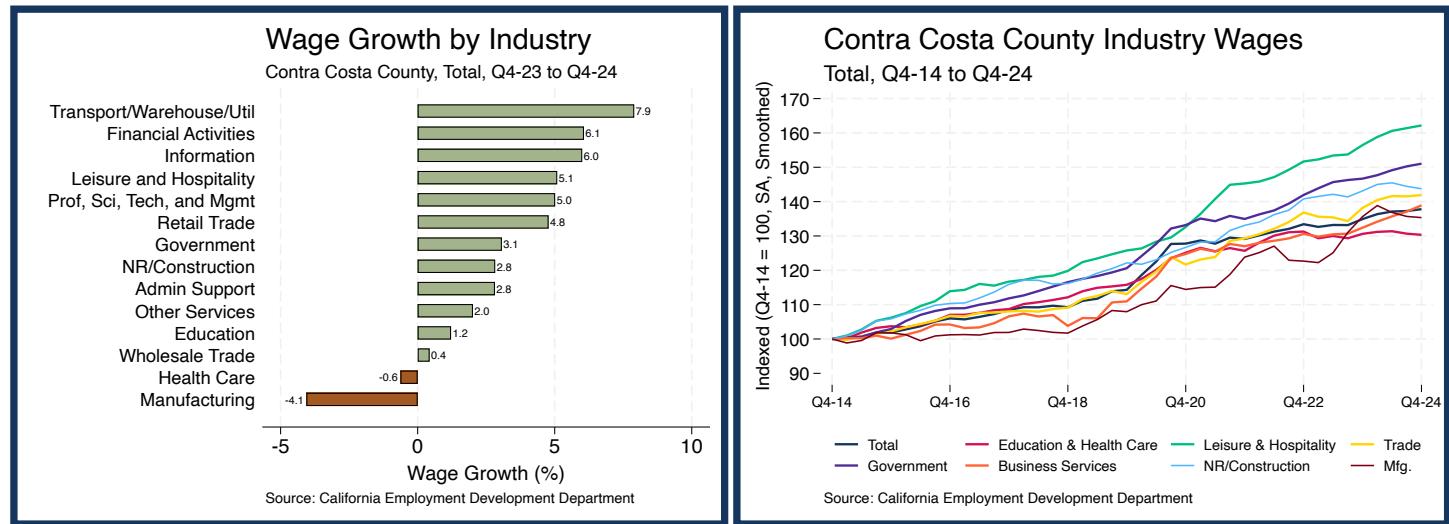


Table 5: Annual Average Wages by Industry: Q4-24

Industry	Avg. Wage (\$000s)	1-Year Growth County (%)	1-Year Growth State (%)	5-Year Growth County (%)	5-Year Growth State (%)	County vs. State (%)*
Information	165.7	+6.0	+20.4	+37.9	+57.9	-46.8
Prof, Sci, Tech, and Mgmt	151.0	+5.0	+19.0	+22.8	+42.5	-18.3
Financial Activities	141.5	+6.1	+2.9	+26.9	+24.8	-1.9
Manufacturing	123.2	-4.1	-4.9	+22.7	+22.2	1.8
Transport/Warehouse/Util	118.3	+7.9	+5.5	+15.9	+29.3	35.9
Wholesale Trade	104.4	+0.4	+3.0	+7.7	+30.7	-0.7
NR/Construction	99.2	+2.8	+5.2	+19.5	+24.2	28.6
Health Care	78.0	-0.6	+2.0	+12.0	+22.8	19.5
Admin Support	71.6	+2.8	+1.8	+34.4	+32.7	11.4
Other Services	53.4	+2.0	+2.2	+24.4	+32.2	-3.0
Retail Trade	52.4	+4.8	+4.4	+34.9	+28.7	5.8
Education	49.3	+1.2	+2.9	+16.1	+19.9	-27.7
Leisure and Hospitality	33.3	+5.1	+6.2	+31.3	+26.3	-19.6
Total Private	85.9	+2.4	+6.8	+20.3	+31.0	-8.7
Government	92.0	+3.1	+7.4	+25.4	+27.0	-1.9
Total	86.7	+2.6	+6.9	+21.0	+30.4	-7.8

*Industry wage relative to the average annual wage for the industry in the State

Table 6: One-Year Wage Growth
Fastest Growing Subsectors with 250+ employees: Q4-24

Subsector	Wage (\$000s)	Growth (%)	Total Emp.
Warehousing and Storage	109.4	+23.0	2,678
Health and Personal Care Retailers	58.6	+21.3	2,706
Securities, Commodity Contracts, and Other Finan	259.3	+14.5	2,614
Computing Infrastructure Providers, Data Process	198.8	+10.6	489
Nonmetallic Mineral Product Mfg	111.6	+9.3	457
Building Material and Garden Equipment And Suppl	53.3	+8.7	3,609

Small Business Insights¹

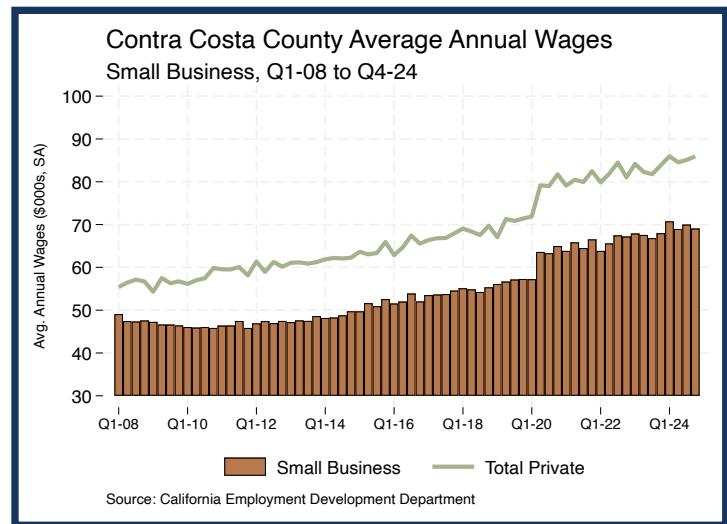
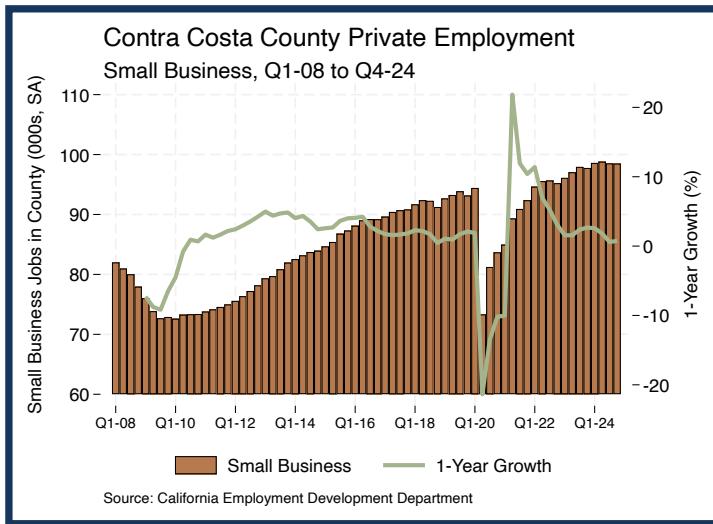


Table 7: Small Business Employment by Industry: Q4-24

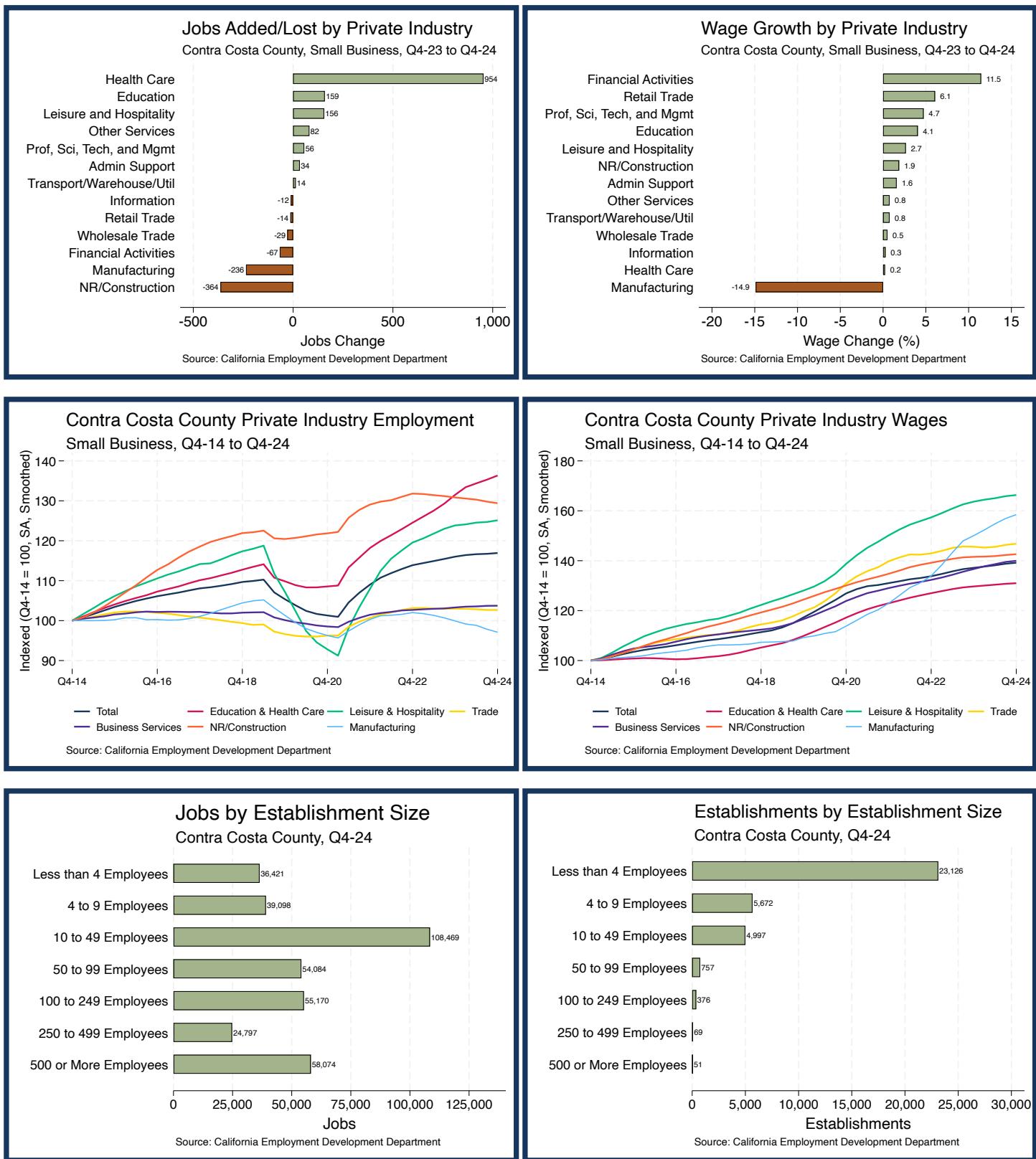
Industry	Employment (#)	1-Year Growth		Small Share of Total (%)
		Small Business (%)	Total Private (%)	
Leisure and Hospitality	18,967	+0.8	+0.6	46.6
Health Care	16,440	+6.2	+6.4	21.2
NR/Construction	13,569	-2.6	-5.7	49.2
Prof, Sci, Tech, and Mgmt	10,688	+0.5	+0.6	34.8
Other Services	7,278	+1.1	-0.5	55.6
Admin Support	7,234	+0.5	-2.4	32.3
Retail Trade	6,308	-0.2	-2.6	15.8
Financial Activities	4,906	-1.3	-2.7	21.7
Manufacturing	3,538	-6.3	-7.0	27.3
Education	3,495	+4.8	+3.3	42.6
Wholesale Trade	3,111	-0.9	-5.5	40.0
Transport/Warehouse/Util	1,866	+0.8	+4.0	12.2
Information	1,101	-1.1	-9.6	22.0
Total Private	98,501	+0.7	+0.0	30.4

Table 8: Small Business Annual Avg. Wages by Industry: Q4-24

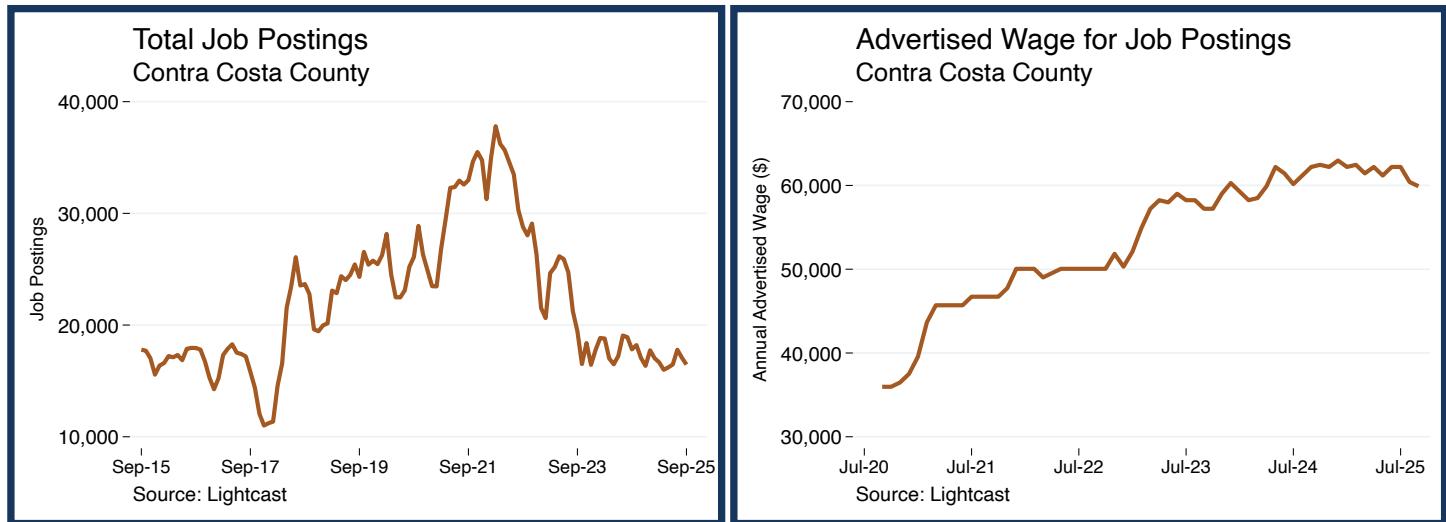
Industry	Avg. Wage (\$000s)	1-Year Growth		Small vs. Total (%)*
		Small Business (%)	Total Private (%)	
Information	154.2	+0.3	+6.0	-6.9
Financial Activities	121.4	+11.5	+6.1	-14.2
Prof, Sci, Tech, and Mgmt	120.6	+4.7	+5.0	-20.1
Wholesale Trade	99.6	+0.5	+0.4	-4.6
Manufacturing	88.5	-14.9	-4.1	-28.1
NR/Construction	82.3	+1.9	+2.8	-17.1
Transport/Warehouse/Util	64.0	+0.8	+7.9	-45.9
Admin Support	62.8	+1.6	+2.8	-12.4
Health Care	60.4	+0.2	-0.6	-22.6
Retail Trade	53.1	+6.1	+4.8	1.2
Other Services	52.5	+0.8	+2.0	-1.8
Education	38.9	+4.1	+1.2	-21.2
Leisure and Hospitality	31.1	+2.7	+5.1	-6.8
Total Private	69.1	+1.6	+2.4	-19.6

*Industry wage relative to the average annual wage for the industry in the County

¹Small business is defined as businesses with only one establishment and between 4 and 49 employees



Job Postings



Contra Costa County Job Postings

Industry	Job Postings Sep-24	Job Postings Sep-25	1-Year (Change)
Total	18391	17055	-1336
Education/Health	4304	4539	235
Unclassified Industry	2759	2923	164
Retail Trade	2482	2039	-443
Prof, Sci, Tech, and Mgmt	1503	1528	25
Financial Activities	1103	1099	-4
Leisure and Hospitality	1501	1088	-413
Manufacturing	951	769	-182
Admin Support	778	644	-134
Transport/Warehouse/Util	643	527	-116
Other Services	538	502	-36
NR/Construction	512	428	-84
Wholesale Trade	634	400	-234
Public Administration	412	317	-95
Information	271	252	-19

Data Description

The data contained within this report are derived from establishment-level payroll data furnished by the California Employment Development Department (EDD). The EDD collects employment and wage data for every establishment enrolled in the State's Unemployment Insurance program. Entities such as nonprofit organizations that employ less than 4 workers, railroad workers, and workers in school systems that are owned and operated by religious institutions are omitted from this data set.

In order to link individual establishments from one quarter to the next, Beacon Economics developed a method of cleaning, processing, and linking the raw data provided by the EDD. This process amends, adds, or deletes data items, so there will not be a one-to-one relationship between the raw EDD data and the post-process data. Here is a list of a few key steps made by Beacon Economics while processing the data.

- Matching individual establishment records over time
- Re-examining records without exact matches
- Ensuring that cleaning process has resulted in a consistent time series
- Creating consistent industry codes for establishments over time

The publication of data that would disclose an individual firm's employment or wage information is prohibited under the Bureau of Labor Statistic's guidelines of confidentiality. Aggregate data is not published if it represents fewer than three private employers or if one private employer represents 80% or more of the data.

About Beacon Economics

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