



Economic impacts of the COVID-19 pandemic: State perspectives

Economic and Fiscal Health Impact Group May 27, 2020

At the request of President Tim Killeen, IGPA has assembled more than four dozen interdisciplinary faculty experts from all three System universities to assess COVID-19's effects on the state. Assessments focus on three impact groups: Economic and Fiscal Health, Community and Family Resilience, and the Health Care Workforce. Each group is collaborating on a series of modeling activities, data analyses, and syntheses of impact.

This report is the second from the **Economic and Fiscal Health Impact Group**, drawing on the strength of 26 scholar-signatories.

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EXECUTIVE SUMMARY

The economic disruption associated with the COVID-19 pandemic came on suddenly and is quite severe. Because much economic data lags actual events by weeks or months, it is still too early to have a complete picture of the economic damage from the first wave of the pandemic, but we can begin the analysis. We know that the recession has already caused a nearly unprecedented rise in the level of unemployment and that Illinois experienced an economic shock



that parallels the national economic shock. This is unlike the Great Recession of 2007-2009, when the recession evolved slowly and Illinois entered the recession after most of the Midwest and the U.S. However, like past recessions, Illinois may see a smaller decline and perhaps even increases in some sectors. For example, it is quite possible that, despite the recession, many new businesses will be launched as the newly unemployed find creative ways to start new businesses. Although the economic disruption from the pandemic is highly concentrated in a few key sectors (Trade and Transportation, Professional and Business Services, and Leisure and Hospitality), our economic model forecasts that the disruption will spread through Illinois' highly interconnected economy. The model estimates that each job lost directly to the recession will trigger about 0.38 additional job losses in connected industries. Recovery efforts will be challenged by this economic inter-connectedness. Even if public health conditions allow some businesses to be brought online, they will not be able to succeed unless upstream suppliers can provide business inputs and downstream customers feel comfortable with engaging in economic activity.

Like the disease that caused it, the economic downturn is novel in many dimensions and creates massive uncertainties.

HOW WILL THE COVID-19 PANDEMIC AFFECT THE ILLINOIS ECONOMY?

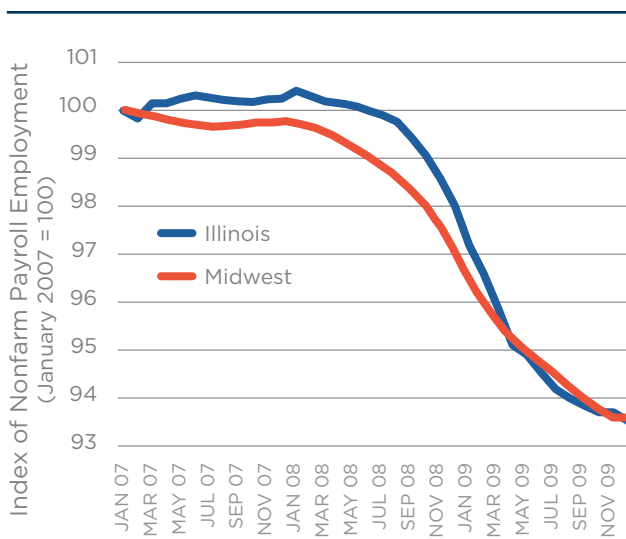
The current economic situation was caused by factors totally outside of the normal structure of the economy, making it unique. Past recessions stemmed from a financial crisis following an asset bubble or the Federal Reserve raising interest rates to combat inflation. But this time is truly different, the COVID-19 pandemic was not widely anticipated. The economy seemed to be healthy as late as January of this year. But then the virus began to spread uncontrollably, and the response by decision-makers to issue stay-at-home orders deliberately froze large swaths of economic activities. Our struggle to develop both public health and economic policies to best recover from the COVID-19 pandemic is complicated by the unusual nature of this crisis. The coronavirus is novel. It was previously unknown. Medical experts are struggling to understand how contagious it is, how dangerous it is and to whom, whether and to what extent surviving the disease confers immunity, what therapies may be available, and how long it will take to develop a vaccine. Like the disease that caused it, the economic downturn is novel in many dimensions and creates massive uncertainties. In this report, we present some early evidence about what has happened thus far and, based on the best available but

admittedly slim current evidence, what we expect to happen with respect to Illinois' economic activity over the next 12 months.

HOW IS THIS RECESSION DIFFERENT FROM PAST RECESSIONS? WHAT WE KNOW THUS FAR

Like the virus, the economic downturn arrived with astounding speed. Recent economic slides have taken months or even years to evolve. In the Great Depression, economic output and employment started to fall in 1929, but the economy did not hit bottom until 1932. The 1946-47 post-World War II recession started in the second half of 1945. The 1980-82 "double dip" recession started in the second half of 1979. Finally, the Great Recession of 2007-09 started in the final quarter of 2007 but the bottom occurred in early 2009. That recession was characterized by a prolonged decline in employment and other macroeconomic indicators. As shown in Figure 1, during the 2007-09 Great Recession, Illinois' employment did not begin to decline until about May 2008, at least five months after the U.S. as a whole experienced significant economic disruption and substantially later than the Midwest region. Despite this, Illinois' and the rest of the Midwest's recovery started at about the same time as the national recovery, meaning that the recession was shorter in Illinois.

Figure 1: Index of employment decline during the Great Recession



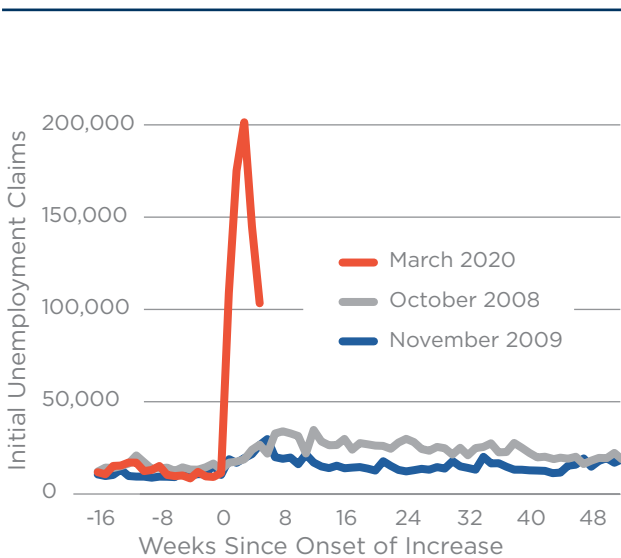
Source: U.S. Bureau of Labor Statistics.

By contrast, the current crisis has been marked by an abrupt “structural break” in the growth of the economy. Figure 2 shows initial claims for unemployment in Illinois in the current and past two recessions, and Figure 3 shows the same data for the U.S. as a whole. The period captured in the figures extends from 16 weeks before the onset of the recession-related increase in unemployment claims to one year after.¹ There are two obvious differences between the COVID-related recession and past recessions: the speed with which the peak occurred and the disproportionate rise in the number of claims. Before April 2020, the largest number of claims in one week occurred in October 1982 and reached one-tenth of the peak number of claims in this recession.

The early unemployment claims in the current recession dwarf those of previous recessions. In many cases, the genesis of those claims is also qualitatively quite different: many of those currently unemployed were laid off because their place of employment was ordered to close or greatly contract its business activities due to public health concerns. Many of the unemployed will be able to garner relatively generous unemployment benefits due to recently enacted federal legislation. Despite this potentially mitigating factor, the hardship is undeniable and the macroeconomic repercussions are immense.

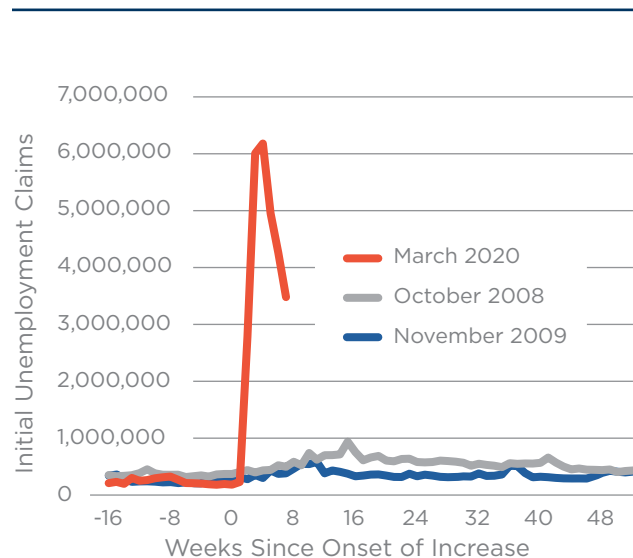


Figure 2: Initial unemployment claims (Illinois)



Source: U.S. Department of Labor. Unemployment Insurance Weekly Claims Data. Retrieved May 10, 2020 from <https://oui.doleta.gov/unemploy/claims.asp>.

Figure 3: Initial unemployment claims (U.S.)

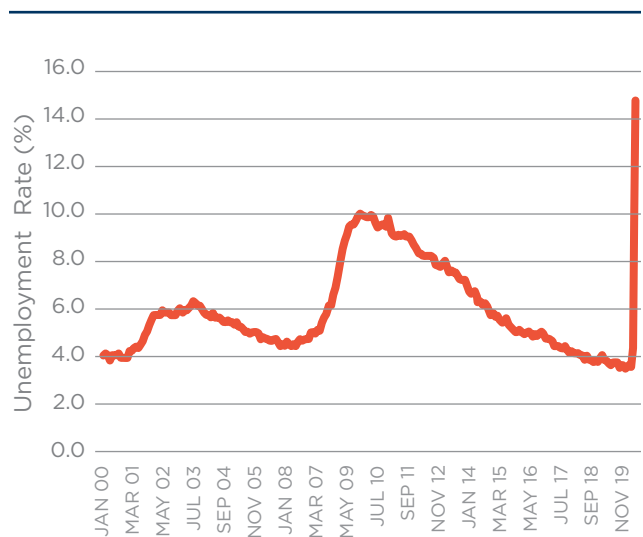


Source: U.S. Department of Labor. Unemployment Insurance Weekly Claims Data. Retrieved May 10, 2020 from <https://oui.doleta.gov/unemploy/claims.asp>.

One of the challenges to assessing the economic impact of the COVID-19 pandemic is that traditional economic data typically lag the actual events or changes in the economy by several weeks or months, in most cases. This is especially true at the state and local level. For example, the “Employment Situation” report, detailing employment and unemployment data in the overall population, is released at the national level on the first Friday of the month following the month where the data is collected. On May 8, complete data were released on national unemployment for April; the data are presented in Figure 4 and reveal the overall depth of the impact of social distancing on the labor market—specifically, the overall national unemployment rate jumped from 4.3% to 14.7%. Across the major sectors of the economy, the unemployment rates ranged from a high of 39% in Leisure and Hospitality to a low of 5.4% in Financial Activities. However, the data for states and metropolitan areas will not be released until late May and early June, and the dynamics of a fast-moving situation are likely to have changed. Consequently, researchers are beginning to turn to new sources of data that become available with greater frequency.

What cannot be forecast at this time is whether Illinois’ recovery will lag that of the U.S. or whether the historical divergence between Illinois and U.S. job growth will persist, widen, or narrow.

Figure 4: Seasonally adjusted unemployment rates for the U.S. economy, 2000-2020

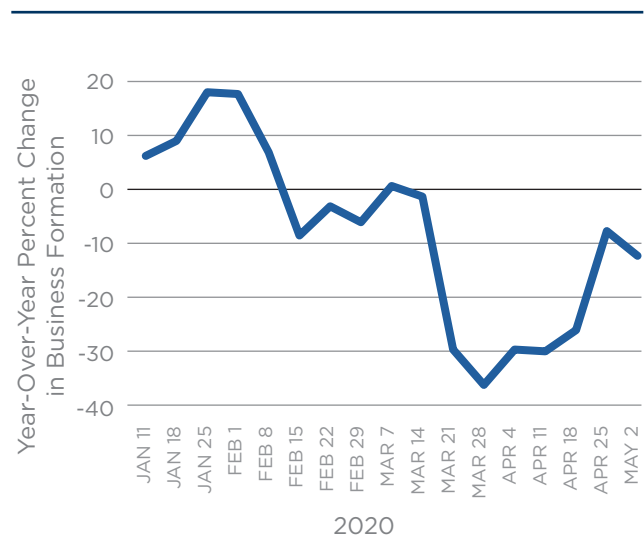


Source: U.S. Bureau of Labor Statistics. *Employment Situation*. Retrieved May 10, 2020 from <https://www.bls.gov/news.release/empsit.toc.htm>.

The U.S. Census Bureau has recently issued the first of several weekly data series on New Business Formation. Figure 5 shows the data for the first 18 weeks of 2020 (through May 2) compared to the same weeks in 2019. Starting with the week ending March 21, the year-over-year changes moved to be consistently negative. For the month of February and the first two weeks in March, the rate of change in additions was similar to the previous year. One thing to note here is that while there were declines in the growth rate of new businesses, the decrease was not as sharp as the change in employment, and there appears to be improvement starting in April. There are any number of reasons for this. One possible explanation and potential bit of good news is that people who are unemployed, furloughed or underemployed (as part-time employees) may be starting new businesses.²

As shown in Figure 1, the 2007-09 Great Recession began later in Illinois, after the nationwide downturn. In contrast, over the past several weeks, Illinois appears to have moved in the same direction as the U.S. as a whole and employment indicators suggest economic activity in Illinois is likely to move in concert with the U.S. as a whole. What cannot be forecast at this time is

Figure 5: New business formations in Illinois, January-April 2020



Source: U.S. Census Bureau. *Business Formation Statistics - About the Data*. Retrieved May 10, 2020 from https://www.census.gov/econ/bfs/about_the_data.html.

whether Illinois' recovery will lag that of the U.S. or whether the historical divergence between Illinois and U.S. job growth will persist, widen, or narrow.

WHAT TO EXPECT FOR THE FUTURE

Illinois' stay-at-home order and the understandable reluctance many residents have to pursuing economic activities that could endanger their health or the health of others has greatly reduced near-term employment, income and output. The immediate effects can be easily seen but are, thus far, difficult to measure due to the lags in data discussed above. In this section, we combine projections about the annual impact on Illinois' employment, together with a model of the Illinois economy, to project the impact of this disruption across sectors.

Like all economies, Illinois' is complex and characterized by significant interactions among its various sectors. These interactions take the form of purchases and sales between sectors and generate ripple effects. When one sector of the economy expands or, as a result of the COVID-19 pandemic, contracts, the effect reverberates beyond the initial sector to affect, directly or indirectly, almost every sector. Since the goods and services provided by each sector are different—especially in the inputs used—changes in one sector may create a very different pattern of impacts compared to changes in another. This pattern will vary in terms of the sectors affected as well as the magnitude of the impacts.

We measure the ripple effects using a model that calculates “multipliers”—changes in all sectors that are affected by the initial change. The multiplier created by changes in industries and sectors that

supply inputs to the industry where the initial change occurred, referred to as the supply chain, are called “indirect multiplier effects.” A second type of multiplier comes from changes in wages and salaries paid to employees both in the initial sectors impacted and those in the supply chain. These multipliers are called “induced multiplier effects.”

An example of these effects can be seen by examining the likely drop in sales, revenue, and employment caused by the pandemic and associated social distancing measures. Indirect effects include industries that do not suffer great losses in demand from retail consumers but suffer because they supply industries like Leisure and Hospitality, which have seen a dramatic drop in customers. Such industries include food service or linen supply companies. Induced effects in this example include the reduction in spending by employees who were laid off in the hotel and restaurant and food service and linen supply sectors. These reductions in spending will generate further negative effects in the economy.

We use an econometric input-output model in order to capture the likely economic effects of the pandemic-related disruptions. It provides an accounting of the pattern of purchases and sales throughout the supply chains of industries in the state. The model is essentially a large mathematical model of the inner workings of the economy. To initialize the model, we need to have information on the initial shock—economic changes engendered by the pandemic. Because a great deal of the required information to run the Illinois model is not currently available,³ a number of assumptions were made based on the best currently available projections of the impact of the pandemic over the next year (see Box 1).

Box 1: Assumptions used in the econometric input-output model

- The impacts will be realized over a one-year period that began April 2020.
- 550,000 Illinois jobs will be lost over the full year (calculated as just over 4% of total U.S. job losses, using estimates of 15 million jobs lost over the year and the relative Illinois share of national GDP).⁴
- 40% of the direct losses will be concentrated in three sectors identified by Moody's Analytics⁵ and the Brookings Institution⁶ as vulnerable sectors:
 - Trade and Transportation, Professional and Business Services, and Leisure and Hospitality;
 - These sectors account for 16% of the Illinois economy in 2019.
- The remaining 60% of losses will be distributed across all other sectors.

Table 1 shows the results from our model. Based on the estimates of Aronson, Burkhardt, and Faberman for total U.S. job losses, we estimate direct employment losses of 400,000, primarily in the vulnerable sectors of the economy.⁷ Because of the loss of these jobs, our model projects indirect and induced effects that will generate a further loss of 150,000 jobs. On average, each direct job loss will generate the loss of 0.38 additional jobs due to lack of demand for suppliers and reductions in spending by former employees. We project that more than \$28.5 billion in income will be lost to Illinois citizens and businesses, along with \$76 billion in economic output, which is the value of goods and services produced. The majority of the job and income losses will come in the vulnerable sectors, as one might expect. However, construction and government will also be greatly affected by the economic downturn. We estimate the Construction and Government sectors will lose 26,000 and 30,000 jobs statewide, respectively.

Of note is the disproportionate number of job losses in the Resources, Services, Trade, and Construction sectors compared to output and income losses. In other sectors such as Durable Manufacturing, there are about 4,000 jobs lost for every \$1 million in output loss. But in the four sectors named, there are between 7,000 and 12,000 jobs lost for every \$1 million in lost output. The reason is that those sectors are much more labor intensive, requiring more labor input per unit of output. So as revenue is lost in those industries from social distancing and from a general contraction in aggregate demand, we expect job losses to be disproportionately large.⁸

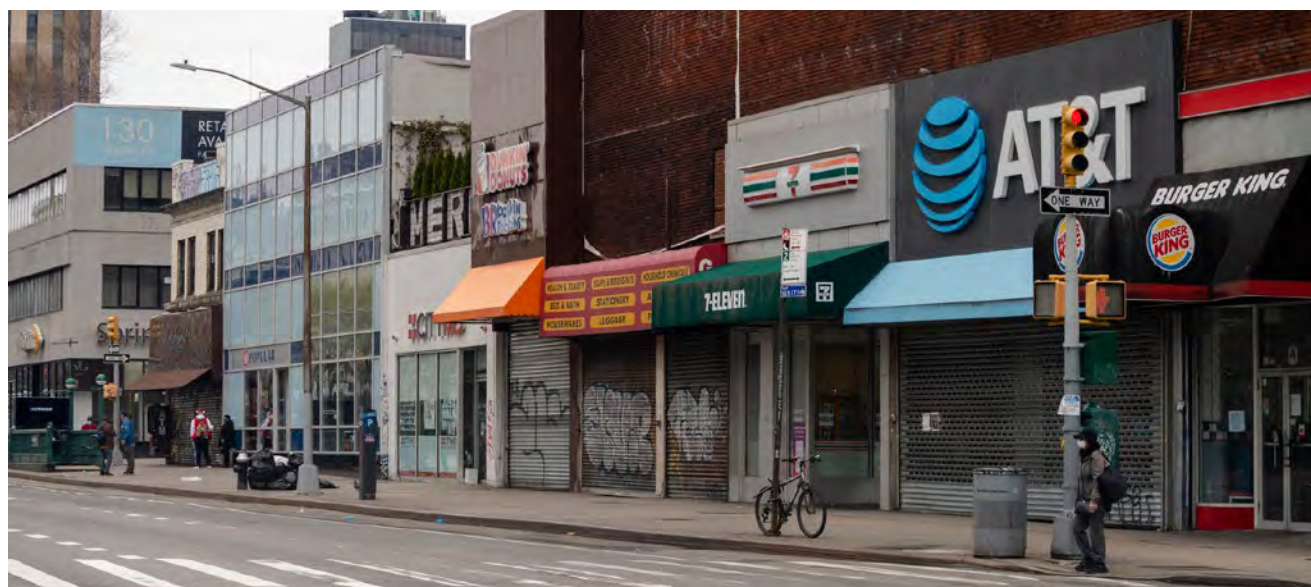
With recent unemployment claims already exceeding 30 million nationally, the assumption in

Table 1: Results of econometric input-output model

Industry	Output (\$m)	Income (\$m)	Employment
Resources	-89	-32	-1,090
Construction	-2,657	-1,283	-26,450
Nondurable Manufacturing	-1,040	-160	-2,320
Durable Manufacturing	-905	-261	-4,110
TCU	-14,046	-4,218	-65,630
Trade	-2,177	-748	-21,620
FIRE	-2,219	-429	-9,370
Services	-52,595	-19,683	-389,620
Government	-379	-1,696	-30,290
Total	-76,110	-28,515	-550,520
Direct Effects	-61,893	-21,851	-400,000
Indirect Effects	-14,217	-6,664	-150,520
Multiplier	1.23	1.30	1.38

Source: Illinois Econometric Input-Output Model, Details at <http://www.real.illinois.edu/products/models.html>.

Notes: TCU is Transportation, Communications and Public Utilities; FIRE is Finance, Insurance and Real Estate.



Box 1 that *only* 15 million jobs will be lost nationally might seem very conservative. However, Table 1 represents our estimates for Illinois over a one-year period, so the 15 million figure—or 550,000 for Illinois—should be thought of as jobs lost across the entire year. For this purpose, a job that disappears for three months represents the loss of one-fourth of a job for the year. In reality, many more jobs than 15 million are likely to be affected; for example, some employees may be furloughed for several months and then return to work; other positions may be reduced to 75% or 50% of full time. In all likelihood, somewhere between 1 million and 1.5 million Illinois jobs may be affected. The final impact will depend on the extended effects of the stay-at-home orders and the pace and structure of the opening up of the economy.

CHALLENGES TO RECOVERY

There are many challenges for the eventual recovery of the economy. While a “gradual opening up” sounds reasonable, the realities of the modern economy and presence of the coronavirus suggest that attention has to be paid to the complexities of the interactions between sectors, the relationship between income and expenditures of households, and how the so-called new normal will affect the

viability of many operations. Some sectors may have more flexibility than others, but supply chains are complex and tightly integrated as a result of competitive pressures. Just-in-time assembly has proven to add to the productive efficiency of the economy at a potential cost of reducing the ability to withstand disruptions. In recent weeks, the closing of several meat processing facilities has slowed or stopped the delivery of livestock from farms, creating a significant bottleneck in the supply chain. Many restaurant owners have estimated that their ability to cover costs might be challenged if occupancy levels are reduced as a result of social distancing rules. This will limit the ability of restaurants to rehire the pre-pandemic levels of staff, further delaying the economy’s recovery. Also, for those who have lost jobs or have seen a reduction in income from reduced hours, it is likely that their demand for restaurant meals, visits to athletic events, and other entertainment might be curtailed for both financial reasons and concerns about infection.

In terms of forecasting a recovery, analysts and forecasters have discussed patterns that resemble letters of the alphabet or symbols. The most optimistic models envision a “V-shaped” recovery, with a fast decline and equally fast recovery. An example of this type of model is from the Congressional



Budget Office. It predicts a decline of almost 40% in Gross Domestic Product (GDP) on an annualized basis in the second quarter, followed by an immediate recovery in GDP to a positive 23.5% growth in the third quarter.⁹ An opposite pattern to this is an “L-shaped” recovery, with a rapid decline and then an extremely slow return to economic growth. An example of this pattern was recently issued by Guggenheim Investments, which predicts negative growth through the first two quarters of 2020, then a slow return to trend growth over the next four years.¹⁰ Most recently, Zandi, deRitis and Sweet have described the most likely pattern as a “Nike swoosh,” with a gradual return to trend growth.¹¹

Alternative economic data are also revealing patterns in the economy that have been influenced by the unique circumstances of a pandemic-driven economic contraction. Using credit card data, Earnest Research revealed some significant changes in the ways consumers have been allocating their purchases.¹² They found a significant increase in food expenditures from grocery stores and a concomitant decline in expenditures at restaurants and for entertainment. There also have been declines in non-food-related shopping, travel and transportation, especially decreases in gas purchases. When the Census Bureau reveals the results of the most recent Current Population Survey, it will be possible to estimate the impact of (1) redirection of consumer expenditures, and (2) the reduction in overall spending. Since household consumption represents about 70% of GDP, small changes in the volume of spending and the distribution of spending can have very significant impacts that will vary among sectors of the economy.

One of the most important factors that will drive the shape of the recovery is the degree to which employees are going to feel comfortable returning to the workplace and how households view the risk of attending sporting events, cultural activities and leisure facilities. A recent Washington Post-University of Maryland poll found that a broad majority of



respondents would not feel comfortable going to gatherings of 10 or more people until later in 2020 or beyond.¹³ These were not risks faced by households in the recovery from previous recessions, so they add an important layer of uncertainty to the current economic situation. Further, many of the employees in vulnerable sectors may be very dependent on child-care facilities and the ability of these operations to resume may impede labor force participation.¹⁴

We are honored to have the opportunity to harness our collective research and experience to serve our neighbors and the residents of Illinois during a time of great need.

Respectfully submitted,

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ENDNOTES

¹ We define the onset as occurring when the number of claims exceeds the baseline—further defined as the 52-week moving average of claims—by 50% for a prolonged period of time.

² There is evidence of increased new businesses formation in previous recessions. See Fairlie, R. W., “Entrepreneurship, Economic Conditions, and the Great Recession.” *Journal of Economics & Management Strategy*, 22(2), 207–231.

³ Even less data are currently available about economic conditions in sub-state regions. However, we expect to be tracking sub-state conditions as data becomes available. See the Illinois Economic Observatory at <https://perma.cc/Y9UB-468Q>.

⁴ Aaronson, D., Burkhardt, H., and Faberman, J., “Potential Jobs Impacted by Covid-19,” Chicago Fed Insights. Retrieved May 5, 2020 from <https://perma.cc/82C3-HEQM>.

⁵ Zandi, M., “COVID-19: A Fiscal Stimulus Plan,” *Moody’s Analytics Economic View*. March 16, 2020, Retrieved April 27, 2020 from <https://perma.cc/C5MJ-44PJ>.

⁶ Muro, M., Maxim, R., & Whiton, J., “*The Places a COVID-19 Recession Will Likely Hit Hardest*,” Brookings Institution. Retrieved April 5, 2020 from <https://perma.cc/TRA5-29YM>.

⁷ Aaronson, D., et al, “Potential Jobs.

⁸ As an aside, the government sector is an outlier in the calculations here; the concept of government output is not well measured or well defined.

⁹ Swagel, P., “CBO’s Current Projections of Output, Employment, and Interest Rates and a Preliminary Look at Federal Deficits for 2020 and 2021.” Congressional Budget Office Blog, April 24, 2020, Retrieved May 9, 2020 from <https://perma.cc/48T9-SAAM>.

¹⁰ Miner, S., “Prepare for the Era of Recrimination,” Guggenheim Investments, Retrieved May 9, 2020 from <https://perma.cc/ZC7V-9A5K>.

¹¹ Zandi, M., DeRitis, C., & Sweet, R., “COVID-19: Q&A Update,” Moody’s Analytics. April 2020, Retrieved May 6, 2020 from <https://perma.cc/5YY3-5RZ9>.

¹² Earnest Research, “Coronavirus is Changing How We Spend Money, Part 3,” <https://perma.cc/8RSQ-QF4Y>.

¹³ Balz, D., Clement, S., “Americans’ Expectations for Safe Public Gatherings Slip to July at the Earliest, Post-U. Md. poll finds,” *Washington Post*, May 13, 2020, <https://perma.cc/DZR6-4Q2G>.

¹⁴ Powers, Elizabeth T., “Policy Spotlight: The Foundational Role of Child Care for Economic Recovery from the COVID-19 Pandemic,” Institute of Government and Public Affairs, University of Illinois System, Forthcoming.

Photography from istockphoto.com

- Pg. 1 - Closed sign on street #1213432934 by tumsasedgars
- Pg. 3 - Masked Ben Franklin #1218811591 by Feverpitched
- Pg. 5 - Empty streetscape #1218114737 by Alex Potemkin
- Pg. 7 - Man on Steps #1222691579 by Blue Planet Studio
- Pg. 8 - Woman in store #1214438422 by zoranm

Audience

IGPA Impact Reports are intended to be useful to policymakers and stakeholders, including but not limited to University of Illinois System leaders, state legislators, Governor J.B. Pritzker’s office, state agencies, news media, nonprofits, educators, volunteer organizations, and faith leaders.

IGPA TASK FORCE ON THE IMPACT OF THE COVID-19 PANDEMIC
(AS OF MAY 7, 2020)

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(AS OF MAY 7, 2020)

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IGPA TASK FORCE ON THE IMPACT OF THE COVID-19 PANDEMIC
(AS OF MAY 7, 2020)

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