A Labor Day Briefing for California

September 2019

LaborMarketinfo
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This briefing highlights California’s labor markets as the nation commemorates Labor Day on September 2, 2019.

The report presents significant labor market trends and current statistics relating to the California economy.

Julie A. Su, Secretary
Labor and Workforce Development Agency

Patrick W. Henning, Director
Employment Development Department

Dennis Petrie, Deputy Director
Workforce Services Branch

Amy C. Faulkner, Chief
Labor Market Information Division
Highlights for 2019

California’s employment expansion is now 113 months long, tying the expansion of the 1960s as the longest on record and pushing unemployment to another historic low.

- California’s seasonally adjusted unemployment rate was 4.1 percent in July 2019, tying the record low unemployment rate first set in July through December 2018.

- There were 804,000 unemployed Californians in July 2019. This was a decrease of 1,450,000 persons from the recessionary peak in October 2010.

California has enjoyed broad-based industry sector job growth over the course of its employment expansion, including the last year.

- California gained a total of 3,299,000 nonfarm jobs over the 113 months of expansion from February 2010 through July 2019.

- Two California industry sectors added more than 650,000 jobs each from the February 2010 through July 2019 period: educational and health services (703,500) and professional and business services (688,000).

- On a percentage basis, construction (58.4 percent) has been the fastest growing industry sector, followed by leisure and hospitality (36.7 percent), professional and business services (33.5 percent), educational and health services (33.3 percent), and information (29.5 percent).

Job projections in California.

- California’s total employment is projected to increase by 3.2 percent (612,000 jobs) between the second quarter of 2018 and the second quarter of 2020, reaching nearly 19.5 million jobs. The occupational groups with the most projected growth are personal care and service (79,100), food preparation and serving related (62,400), and construction and extraction (56,000).

- Total job openings are projected to be 4.8 million over the same time period, including the creation of new jobs and positions vacated by workers leaving the labor force or making career changes.
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California’s Labor Market Ties Its Longest Employment Expansion on Record

As the nation commemorates this Labor Day in 2019, the California Employment Development Department reports conditions in California’s labor market remain very strong. California’s ongoing employment expansion turned 113 months old in July 2019, which tied the 1960s expansion as its longest on record. The California economy added 3.3 million nonfarm jobs over the course of these 113 months and the unemployment rate has fallen to an historic low.

UNEMPLOYMENT

California’s unemployment rate has fallen to a record low level.

- California’s seasonally adjusted unemployment rate was 4.1 percent in July 2019. This was the state’s lowest unemployment rate on record in a data series going back to 1976, matching the previous low that occurred during the last six months of 2018. California’s unemployment rate has fallen from a record high of 12.3 percent in November 2010 to its current record low of 4.1 percent over the course of current expansion.

![Figure 1](California's Official Unemployment Rate Since 2010)

Source: Employment Development Department

- There were 804,000 unemployed Californians in July 2019. This was a decrease of 1,450,000 persons from the recessionary peak in October 2010.

- It appears that unemployment in California may have fallen about as low as it can. The rate exhibited no year-over change for the fifth consecutive month in July 2019 and the number of unemployed ticked up by just 2,000 persons over the last year.
• Stable unemployment is a characteristic of a full employment economy operating at or near full capacity in which the supply of workers (people looking for work) is in balance with labor demand (employers seeking workers). There will always be some unemployment because of natural churn in the labor market, resulting from business startups and closures, people leaving jobs for better opportunities, people losing work, and people entering the labor market for the first time or re-entering it after a spell on the sidelines.

TOTAL NONFARM EMPLOYMENT (SEASONALLY ADJUSTED JOBS)

California has gained 3.3 million nonfarm jobs over the course of its 113-month expansion.

• California gained 19,600 nonfarm jobs in July 2019. This gain extended the length of the state’s ongoing employment expansion, as measured by peaks and low troughs in total nonfarm employment, to 113 months, tying it with the July 1960-December 1969 expansion as California’s longest expansion on record. After a slow start to the expansion, the state has experienced nearly uninterrupted job growth over the last eight years, gaining jobs in all but three of the 97 months ending in July 2019.

Figure 2

California Total Nonfarm Jobs Since 2006
July 2019; Seasonally Adjusted Data

• California gained a total of 3,299,000 nonfarm jobs over the 113 months of expansion from February 2010 through July 2019. The labor market recovered the 1,316,400 nonfarm jobs it lost during the July 2007-February 2010 recession in May 2014 and has continued to add jobs steadily since. Despite the severity of the recession, total nonfarm employment was nearly 2 million -1,982,600 to be precise - nonfarm jobs higher than it was at the onset of the Great Recession in July 2007.
• California’s dynamic job growth over the last nine-and-a-half years has been vital for the nation’s economy. The nation’s employment expansion also began in February 2010 and its nonfarm job gains through July 2019 totaled 21.7 million jobs. California’s share of this gain was 15.2 percent. In other words, California contributed one out of every 6.6 jobs that the nation gained over the 113-month period from February 2010 through July 2019.

• California’s has outperformed other states in terms of job creation over the last 113 months. California’s 3,299,000 nonfarm job gain from February 2010 through July 2019 ranked first among states, far exceeding Texas’s 2,569,400-job gain over the same period. Despite its large size, California also added jobs at a faster pace than most other states over the last 113 months. Its 23.2 percent nonfarm job gain from February 2010 through July 2019 ranked 8th highest among states and bettered the nation’s 16.7 percent job gain over the same period.

• California has continued to experience solid job growth over the last year, gaining 311,800 nonfarm jobs over-the-year in July 2019, which was a 1.8 percent increase. While this was below the 2.5 percent pace of year-over growth the state has averaged over the entire length of the expansion, the difference was neither large nor unexpected. One would expect a full employment economy operating at full capacity and with tight labor markets to add jobs at a more moderate pace than a recovering one with idle capacity. Perhaps most importantly, as of July 2019, there were no signs that the prevailing trend of steady job growth in California would end anytime soon.

• Even with its more moderate pace of full employment job growth, year-over job creation in California was stronger than most other states in July 2019. Only Texas, with a gain of 323,300 nonfarm jobs, had a larger year-over job gain than California (311,800) in July 2019. California’s 1.8 percent pace of year-over job growth was stronger than the nation’s 1.5 percent pace in July 2019 and ranked 13th highest among states.

INDUSTRY SECTOR TRENDS (SEASONALLY ADJUSTED JOBS)

California has enjoyed broad-based industry sector job growth over the course of its employment expansion, including the last year.

California’s job gains have been broad-based across industry sectors over the course of the 113 month employment expansion, with 10 of the 11 major industry sectors adding jobs over the period. Only the mining and logging sector, which had just 22,700 jobs and made up just 0.1 percent of total California nonfarm jobs in July 2019, lost jobs over the employment expansion period.
• Educational and health services (703,500) and professional and business services (688,000) added the most jobs among industry sectors from February 2010 through July 2019. These two sectors combined for two-fifths (42.2 percent) of the 3,299,000 nonfarm jobs California has gained over the course of the expansion. Three additional industry sectors added more than 300,000 jobs from February 2010 through July 2019. They were: leisure and hospitality (543,700); trade, transportation, and utilities (464,500); and construction (332,100). As a group, these three sectors contributed another two-fifths (40.6 percent) of the jobs the state has gained during the expansion. The remaining one-fifth of the state’s job gains during the expansion were distributed among the government (173,400), information (127,400), other services (95,000), manufacturing (91,700), and financial activities (80,600) sectors.

• Although every major California industry sector but mining and logging has contributed jobs to California’s employment expansion, their rates of job growth differ. On a percentage basis, construction (58.4 percent) has been the fastest growing industry sector, followed by leisure and hospitality (36.7 percent), professional and business services (33.5 percent), educational and health services (33.3 percent), and information (29.5 percent). These five industries may be considered to be the leaders of the state’s employment expansion since employment in each of them grew at faster rate than the overall economy’s 23.2 percent rate from February 2010 through July 2019.

• As a group, these five industry sectors encompass the full spectrum of skill and pay levels in the labor market. Professional and business services and information have a high technology orientation and tend to have skilled and high-paying jobs. Construction tends to have middle skill and middle-paying jobs, while leisure and hospitality tends to have less skilled and comparatively low-paying jobs. Educational and health services is a mixed bag and runs the gamut from highly skilled and high-paying jobs in medicine to low skilled and low-paying jobs in social assistance.
• California continued to experience broad-based job growth across industry sectors over the last year, with 10 of the 11 major industry sectors posting year-over job gains in July 2019. Once again, the mining and logging sector (300) was the only industry sector that had a small job loss. Educational and health services (82,800) and professional and business services (78,600) had the largest year-over job gains among sectors in July 2019. These two sectors combined accounted for more than half (51.8 percent) of California’s economy-wide, year-over job gain. Three additional industry sectors had year-over gains of more than 35,000 jobs in July 2019. They were: leisure and hospitality (40,900), construction (37,100), and government (35,100). As a group, these three sectors accounted for more than one-third (36.3 percent) of the jobs the overall economy added over the last year.

• In terms of the rate of job growth, the same industry sectors that have led the employment expansion - construction, leisure and hospitality, professional and business services, educational and health services, and information - also led California’s job growth over the last year. This trend showed no signs of weakening in July 2019.

• There was one sector that had much weaker job growth over the last year in comparison to prior years of the expansion. Trade, transportation, and utilities, the state’s largest industry sector with over three million jobs, gained just 4,500 jobs over the year in July 2019, which was an increase of just 0.1 percent. In contrast, this sector averaged year-over job gains of 55,200 jobs per year in July from 2011 through 2018. Whereas the transportation, warehousing, and utilities subsector added 15,100 jobs over the year in July 2019, the retail trade and wholesale trade subsectors lost 11,000 and 700 jobs, respectively.

• Rather than signaling a pull-back in consumer spending, the job losses in retail trade instead reflect structural change in the industry, as ever increasing numbers of consumers eschew traditional brick and mortar establishments to shop online instead. Several struggling national brick and mortar retail chains announced widespread store closures or went out of business over the last year. Odds are that retail trade will continue to be the weak link in the labor market in years to come as Internet sales make up an ever greater share of total retail sales.

REGIONAL TRENDS (NOT SEASONALLY ADJUSTED DATA)

All regions of California have contributed to and benefitted from the ongoing employment expansion.

• The EDD subdivides California into 14 regions for the purposes of regional economic analysis, which are delineated in the regional unemployment rate map below (Figure 5). These regional definitions are the same as those used by the state workforce development system in strategic planning.

• California’s regions vary greatly in size. The state’s largest region, Los Angeles Basin, had a labor force of 5.1 million persons and employment totaling 4.5 million nonfarm jobs in July 2019. Seven additional regions’ labor markets had labor forces and total employment greater than one million persons or jobs in size. In contrast, Middle Sierra and Humboldt, the state’s smallest regions, each had a labor force of less than 70,000 persons and employment totaling around 50,000 jobs.
• Readers should note that regional unemployment and employment data are not seasonally adjusted. Comparing like-months of the calendar year is the only method available to filter out regular and recurring seasonal patterns of employment and unemployment from not seasonally adjusted data series. This means that the nine-year period from July 2010 through July 2019 best captures the February 2010-July 2019 employment expansion when analyzing unadjusted data.

• In July 2019, Unemployment rates in California’s 14 regions ranged from a low of 2.6 percent in Bay-Peninsula, which is the region that is synonymous with the Silicon Valley, to a high of 7.6 percent in San Joaquin Valley. Five California regions, Bay-Peninsula included, had unemployment rates below 4.0 percent.

![Regional Unemployment Rates in July 2019](https://example.com/image)

Source: Employment Development Department

• Unemployment has fallen to an historic low across most regions of California. In July 2019, 11 of California’s 14 regions had record or record-tying low July unemployment rates in a data series going back to 1990. Four regions—Los Angeles Basin, Inland Empire, Middle Sierra, and Ventura—had their lowest July unemployment rate on record. The July 2019 unemployment rates of seven regions—Bay-Peninsula, Capital, Coastal, East Bay, North State, San Joaquin Valley, and Southern Border—tied July 2018 for their lowest July unemployment rate on record. The July 2019 unemployment rate in Humboldt and North Bay was just 0.1 percentage point higher than the record July low in 2018. Orange County’s 3.2 percent unemployment rate in July 2019 was its lowest July unemployment rate since 1999.
California’s job gains have been broadly distributed across regions over the course of the expansion and the last year.

- All regions of California have gained jobs over the course of the ongoing employment expansion. Los Angeles Basin (632,700) had the largest job gain among California regions over the nine-year period from July 2010 through July 2019, followed closely by Bay-Peninsula (618,600). Five additional large regions—Inland Empire (390,800), Orange (300,800), Southern Border (272,700), San Joaquin Valley (240,700), and East Bay (236,700)—gained more than 200,000 jobs. Two more regions—Capital (199,800) and North Bay (101,300)—gained more than 100,000 jobs over the last nine years.

In percentage terms, Bay-Peninsula (35.9 percent) had the largest nine-year job gain of any California region, followed closely by Inland Empire (34.5 percent). East Bay (24.6 percent) had the third largest nine-year job increase among regions and Capital (22.8 percent) had the fourth. These four regions were the only regions that experienced faster job growth than California’s not seasonally adjusted 22.5 percent increase from July 2010 through July 2019. However, the nine-year increase for additional regions was only 2.0 percentage points or less below the state’s nine-year gain. These regions include: Orange (22.0 percent), San Joaquin Valley (21.9 percent), Southern Border (21.2 percent), and North Bay (20.5 percent). Although job growth in the state’s largest region, Los Angeles Basin, was slower than in the state as whole over the last nine years, it added more jobs over the last nine years than any other region of the state.
• California’s year-over job gains in July 2019 were also broadly distributed across regions of the state, with all of California regions posting year-over job gains. Bay-Peninsula (69,100) edged out Los Angeles Basin (63,400) as the region which added the most jobs over the last year, despite it having only about half the number of Los Angeles Basin’s jobs. Six additional regions added over 20,000 nonfarm jobs over the 12 months ending in July 2019: Inland Empire (35,300), San Joaquin Valley (31,800), Southern Border (29,800), Orange (24,400), East Bay (21,900), and Capital (21,300).

• In percentage terms, Middle Sierra (4.8 percent) had the largest year-over job gain of any region in July 2019, followed by Bay-Peninsula (3.0 percent) and Coastal (3.0 percent). The rate of year-over job growth equaled or bettered the state’s not seasonally adjusted year-over gain of 1.9 percent in six more regions: Inland Empire (2.4 percent), San Joaquin Valley (2.4 percent), Capital (2.0 percent), Humboldt (2.0 percent), East Bay (1.9 percent), and Southern Border (1.9 percent).

OUTLOOK

The July 2019 unemployment and employment data indicate that California’s current employment expansion shows no signs of ending. Unemployment across the state has fallen to record or near record lows. The state continues to create jobs at a solid rate in a full employment economy. With the exception of retail trade, which is undergoing structural change related to the increase of online shopping, industry job growth over the last year has been broad-based across sectors of the economy. Similarly, California’s job gains over the last year were well-distributed across all regions of the state. With no apparent signs of weakness developing in any industry sector or region of the state, California’s employment expansion is expected to continue.

Employment data tend to be backward-looking, and while they may be helpful in predicting the immediate future, they are much less helpful in predicting what might happen further out on the horizon. Currently, there are some economists warning of heightened risks of recession on the horizon given indications that the global economy is slowing, fears that trade disputes may intensify, and signs of growing instability in financial markets. Other economists dismiss these fears and contend the expansion will continue, if perhaps, with a few bumps along the way. While possible storm clouds may be brewing out on the horizon, they are as yet poorly developed. The only certainty is that the employment expansion will end sometime in the future. In the meantime, unemployment and employment data indicate that conditions in California’s labor markets this Labor Day have seldom been stronger.
California Short-Term Industry and Occupational Employment Projections

The EDD produces employment projections that provide an estimate of the changes in industry and occupational employment over time that result from past industry trends, technological change, and other factors. Statewide short-term (two-year) projections are revised annually. The following is a recap of the most recently published short-term employment projections.

INDUSTRY EMPLOYMENT PROJECTIONS 2018-2020

The EDD projects a statewide total employment increase of 612,000 jobs (3.2 percent) by the second quarter of 2020. The top five fastest growing industry sectors are projected to grow between 3.8 and 6.9 percent. Fifty-six percent of the total projected nonfarm job growth is in three industry sectors: educational services (private), health care, and social assistance; professional and business services; and leisure and hospitality.

- The largest number of new jobs is expected in the educational services (private), health care, and social assistance sector, with a gain of 137,200 jobs and a growth rate of 5.1 percent. Within this sector, social assistance is projected to post the largest gains with 71,500 jobs.

- The professional and business services industry sector is projected to gain 102,600 jobs with a growth rate of 3.9 percent. Recording the biggest gains will be the administrative and support services subsector which is projected to add 36,900 jobs.

- The leisure and hospitality industry sector is expected to add 75,500 jobs with a growth rate of 3.8 percent. Seventy-eight percent of the industry’s job growth is projected to be in the food services and drinking places subsector – a gain of 58,600 jobs.

OCCUPATIONAL EMPLOYMENT PROJECTIONS 2018-2020

California’s total employment is projected to increase by 3.2 percent (612,000 jobs) between the second quarter of 2018 and the second quarter of 2020, reaching nearly 19.5 million jobs. The occupational groups with the most growth forecasted are personal care and service (79,100), food preparation and serving related (62,400), and construction and extraction (56,000).

In addition to job growth, workers are needed to replace those who have exited the labor force or who have transferred to a different occupation. California is expected to generate a combined total of more than 4.8 million job openings, with exits and transfers comprising 87 percent of this total.

The top 10 occupations with the most job openings are expected to generate nearly 1.3 million total job openings, accounting for 27 percent of all openings in California. Six of the top 10 occupations have more openings due to transfers than exits. Transfers are the projected number of workers leaving an occupation and transferring to a different occupation. Exits are the projected number of workers leaving an occupation and exiting the labor force entirely.

The top 10 fastest growing occupations are expected to add jobs at a rate of 9.4 percent or higher, compared to the expected overall 3.2 percent growth rate for California. Construction and extraction occupations make up five of the top 10 occupations on the list.

The 2018-2020 California industry and occupational employment projections are available online.
California Jobs in Demand

The following table lists examples of occupations utilized by various industries where job demand is expected to grow. Occupations were selected based on jobs with the most projected job openings (California short-term occupational projections 2018-2020), annual earnings, and online job advertisements. Occupations are separated into three categories based on educational level—some require a high school diploma or less, while others require two to four years of college or higher. The online job advertisements were extracted from The Conference Board Help Wanted OnLine™ data series, which compiles, analyzes, and categorizes job advertisements from numerous online job boards, including CalJOBS®, California’s labor exchange system.

Figure 8

<table>
<thead>
<tr>
<th>Occupation</th>
<th>Projected 2018-2020 Job Openings¹</th>
<th>2019 Median Annual Wage²</th>
<th>Job Ads in Last 120 Days ending August 16, 2019³</th>
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</thead>
<tbody>
<tr>
<td><strong>REQUIRES A BACHELOR’S DEGREE OR HIGHER</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>General and Operations Managers</td>
<td>54,260</td>
<td>$116,321</td>
<td>6,201</td>
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<td>Registered Nurses</td>
<td>41,280</td>
<td>$106,228</td>
<td>28,942</td>
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<td>Accountants and Auditors</td>
<td>35,720</td>
<td>$77,156</td>
<td>16,040</td>
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<td>Software Developers, Applications</td>
<td>32,980</td>
<td>$125,783</td>
<td>42,158</td>
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<tr>
<td>Substitute Teachers</td>
<td>32,920</td>
<td>$39,374</td>
<td>3,247</td>
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<tr>
<td><strong>REQUIRES SOME COLLEGE, POSTSECONDARY NON-DEGREE AWARD, OR ASSOCIATE’S DEGREE</strong></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Bookkeeping, Accounting, and Auditing Clerks</td>
<td>48,560</td>
<td>$47,465</td>
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<td>Teacher Assistants</td>
<td>41,000</td>
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<td>Heavy and Tractor-Trailer Truck Drivers</td>
<td>35,740</td>
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<td>Nursing Assistants</td>
<td>27,100</td>
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<td>Medical Assistants</td>
<td>23,540</td>
<td>$25,338</td>
<td>3,262</td>
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<td><strong>REQUIRES A HIGH SCHOOL DIPLOMA OR EQUIVALENT OR LESS</strong></td>
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<tr>
<td>Personal Care Aides</td>
<td>270,460</td>
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<td>Combined Food Preparation and Serving Workers, Including Fast Food</td>
<td>168,220</td>
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<td>Retail Salespersons</td>
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<td>Waiters and Waitresses</td>
<td>125,520</td>
<td>$25,895</td>
<td>6,079</td>
</tr>
</tbody>
</table>

¹ For the 2018-2020 period, California’s two-year occupational projections are based on employment from the second quarter of 2018 and project to the second quarter of 2020. These numbers reflect the sum of new jobs and replacements, when employees permanently leave their occupations or the labor force all together. Many jobs are a result of replacements, not growth within an occupation.

² EDD/LMID Occupational Employment Statistics; 2019 Wages reflect California median annual wage. Median is the point at which half of workers earn more and half earn less. The wages are from the 2019 first quarter and do not include self-employed or unpaid family workers.

³ The data from The Conference Board Help Wanted OnLine™ data series reflects California occupations with the highest number of online job advertisements in the 120-day period ending August 16, 2019.
Toolbox for Job Seekers

For a collection of resources to assist job seekers with job search, career exploration, and training needs, visit the Toolbox for Job Seekers.

Glossary of Terms

For definitions of terms used in this briefing, as well as other terms commonly used in connection with employment and labor market information, visit the Glossary of Terms.

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