

Labor Market Information

Coconino County LWIA

Office of Employment and Population Statistics
Arizona Department of Administration

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AGENDA

- LMI in WIOA Local Plans
- Economic Overview
 - Local Demographics
 - Unemployment
 - Industry Growth
- Existing and Emerging In-Demand Industries and Occupations
- LMI Data Sources

Local Plans [Sec. 108 (b)]

– The local plan should include:

- An analysis of the regional economic conditions, including:
 - Existing and emerging in-demand industry sectors and occupations
 - The employment needs of employers in those industry sectors and occupations
- An analysis of the knowledge and skills needed to meet the employment needs of the employers in the region
- An analysis of the workforce in the region, including current labor force employment data, labor market trends, and the education and skill levels of the workforce in the region

LMI should also be included in:

Youth Workforce Investment [Sec. 129 (c)(2)(M)]

- Program elements including services that provide labor market information about in-demand industry sectors or occupations

Training Services [Sec. 134 (C)(3)(G)(iii)]

- Training Services should be directly linked to an in-demand industry sector or occupation in the local area

Career Services [Sec. 134 (e)(3)(A)(1)]

- (iv) Labor exchange services including:
 - (I). job search and placement assistance and career counseling including
 - (aa). information on in-demand industry sectors and occupations

Economic Overview

COCONINO COUNTY

How to use data:

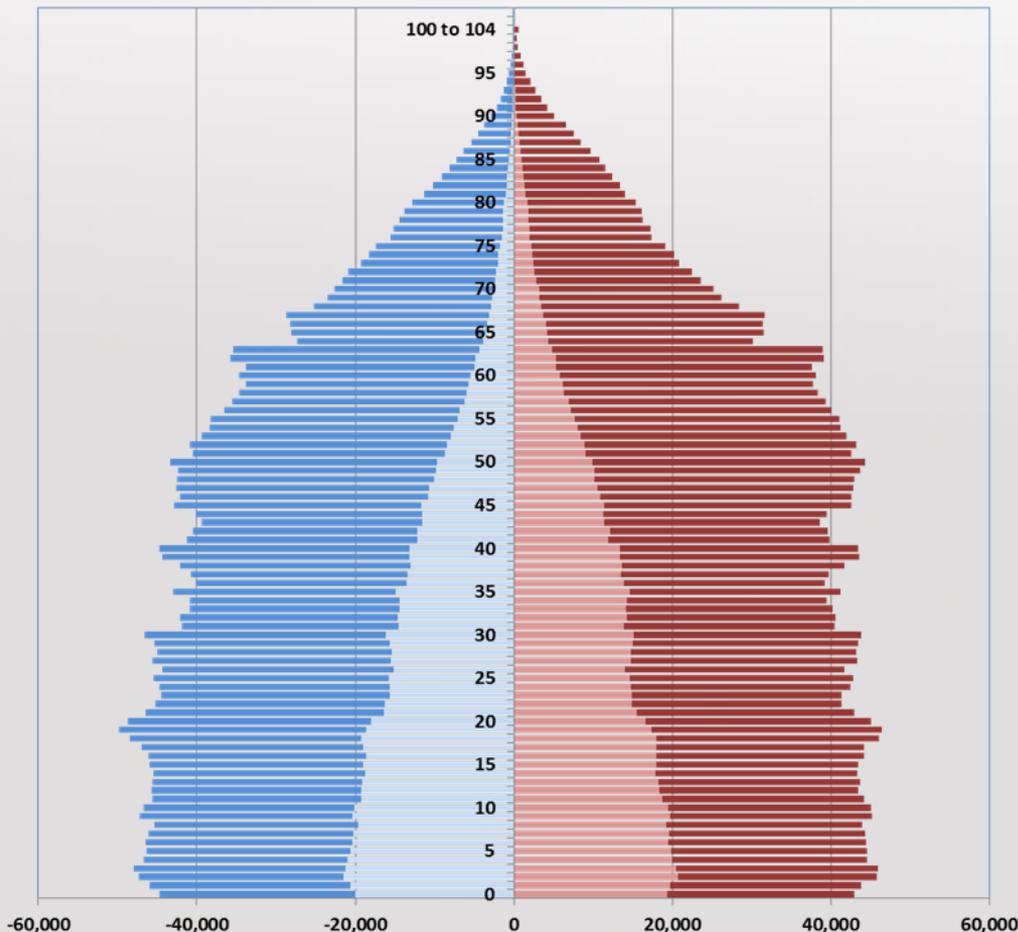
- Use data to drive decision, not validate decisions
- **Use more than one source of data** – don't lock yourself into a single estimate, consider all of the available data to get the most accurate picture
- **Know the limitations of your data set** – it's easy to accidentally misuse data and draw erroneous conclusions
- **Become familiar with different data sets (or someone who is)** – there is no one place to find all the data you need

Immerse yourself in the data

Be prepared to accept surprising surprises

Arizona Population

Hispanic Male Hispanic Female Non-Hispanic Male Non-Hispanic Female



Arizona

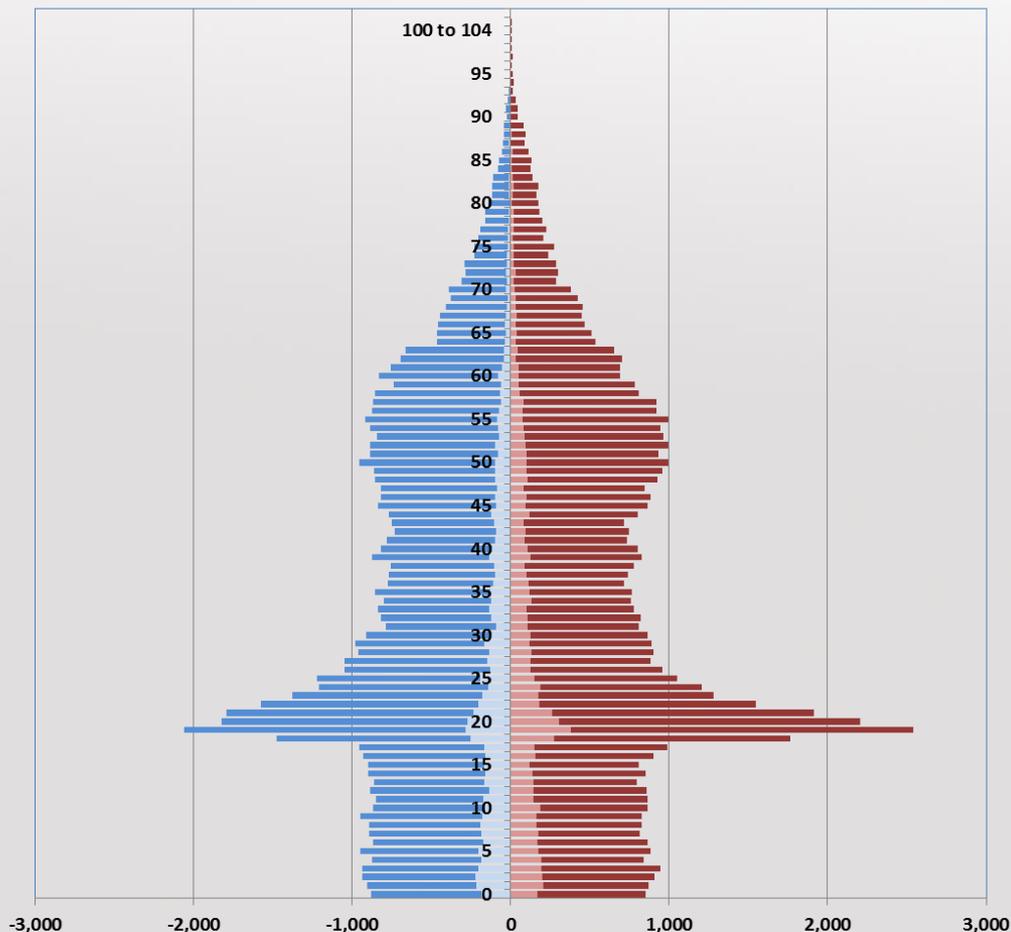
Census 2010

Total Population: 6,392,017

Hispanic	1,895,149	29.6%
Male	951,790	14.9%
Female	943,359	14.8%
Non-Hispanic	4,496,868	70.4%
Male	2,224,033	34.8%
Female	2,272,835	35.6%
Under 17	1,537,878	24.1%
Age 17 - 24	724,347	11.3%
Age 25 - 34	856,693	13.4%
Age 35 - 44	822,494	12.9%
Age 45 - 54	842,546	13.2%
Age 55 - 64	726,228	11.4%
Over 64	881,831	13.8%

Coconino County Population

Hispanic Male Hispanic Female Non-Hispanic Male Non-Hispanic Female



Coconino County

Census 2010

Total Population: 134,421

Hispanic

Male	9,157	6.8%
Female	9,009	6.7%

Non-Hispanic

Male	57,509	42.8%
Female	58,746	43.7%

Under 17	29,848	22.2%
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Age 17 - 24	25,708	19.1%
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Age 25 - 34	18,129	13.5%
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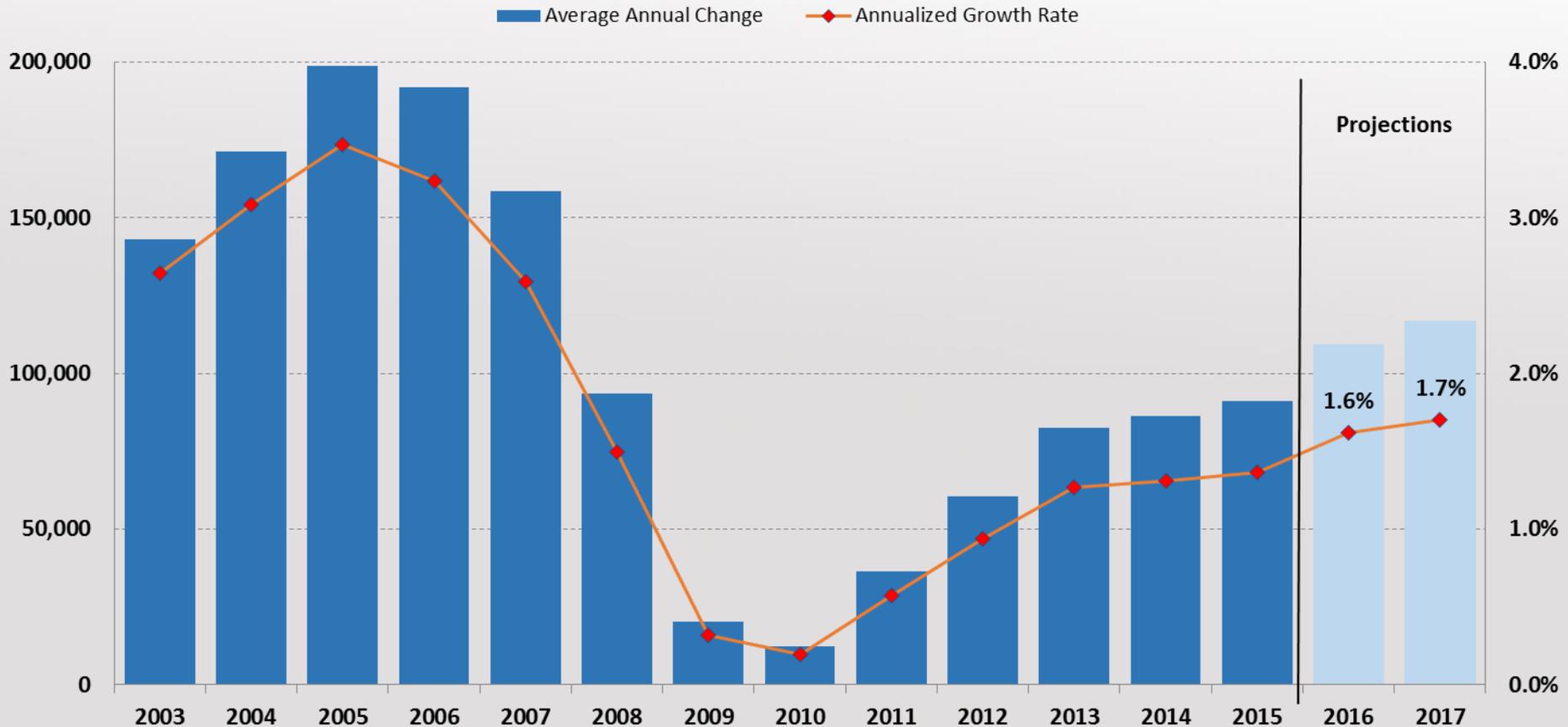
Age 35 - 44	15,499	11.5%
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Age 45 - 54	17,953	13.4%
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Age 55 - 64	15,360	11.4%
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Over 64	11,924	8.9%
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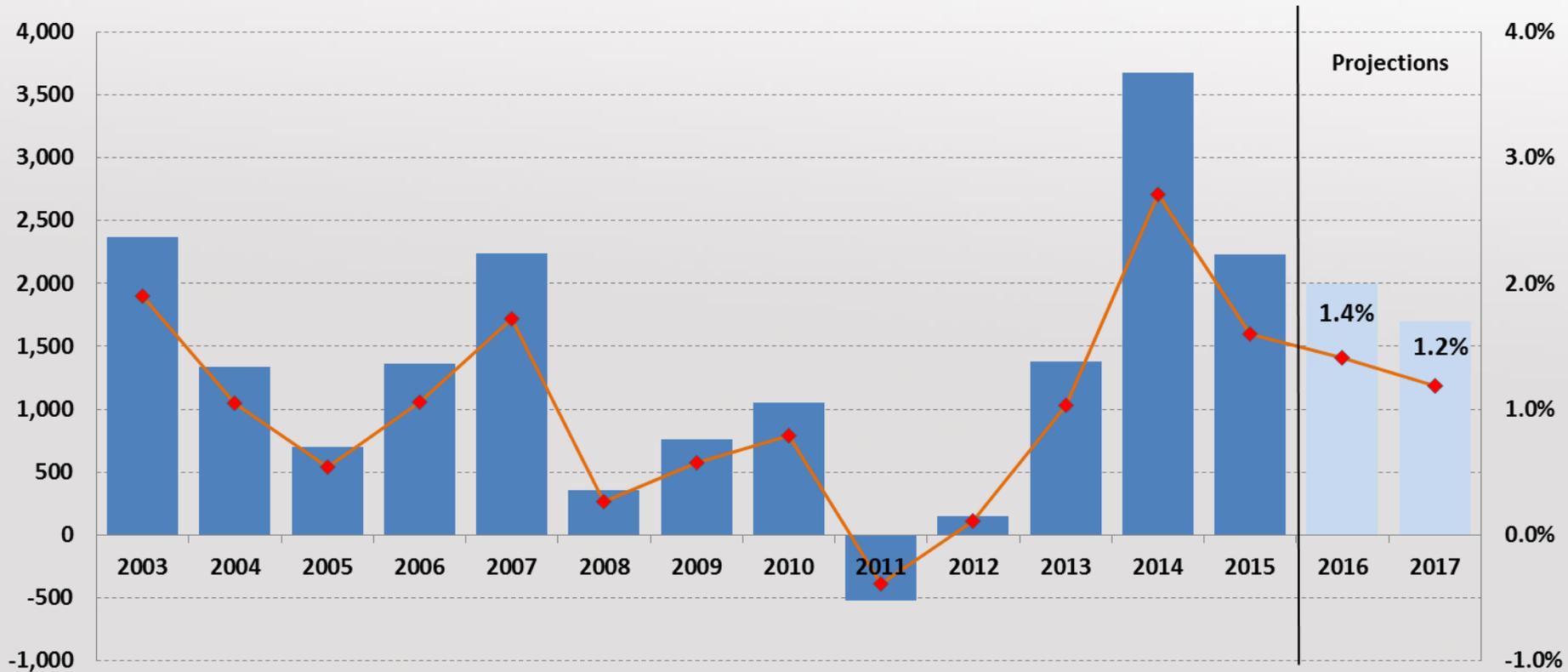
Arizona's Population Growth and Growth Rates, 2003-2017



Source: Produced by the Arizona Office of Employment and Population Statistics using 2010 Census data in cooperation with the U.S. Census Bureau

Coconino County's Population Growth and Growth Rates

■ Average Annual Numeric Change
 ◆ Annualized Percentage Growth Rate



Source: Produced by the Arizona Office of Employment and Population Statistics using 2010 Census data in cooperation with the U.S. Census Bureau

Coconino County Quick Facts (2014)

	Coconino County	Arizona	United States
Median Household Income	\$48,540	\$49,928	\$53,482
Median Age	31.0	36.5	37.4
Individuals with a Disability Between 18-64	9.8%	9.9%	10.2%
Veterans	7.3%	10.0%	8.3%
Poverty Status	23.8%	18.2%	15.6%
Mean Travel Time to Work	18:20	24:42	25:42
Civilian Labor Force Participation Rate	65.3%	59.7%	63.5%
Population over 16	108,682	5,121,781	248,775,628

Source: Produced by the Arizona Office of Employment and Population Statistics using 2014 ACS 5-Year Estimates (DP03, S0501, S1810, S2101) in cooperation with the U.S. Census Bureau

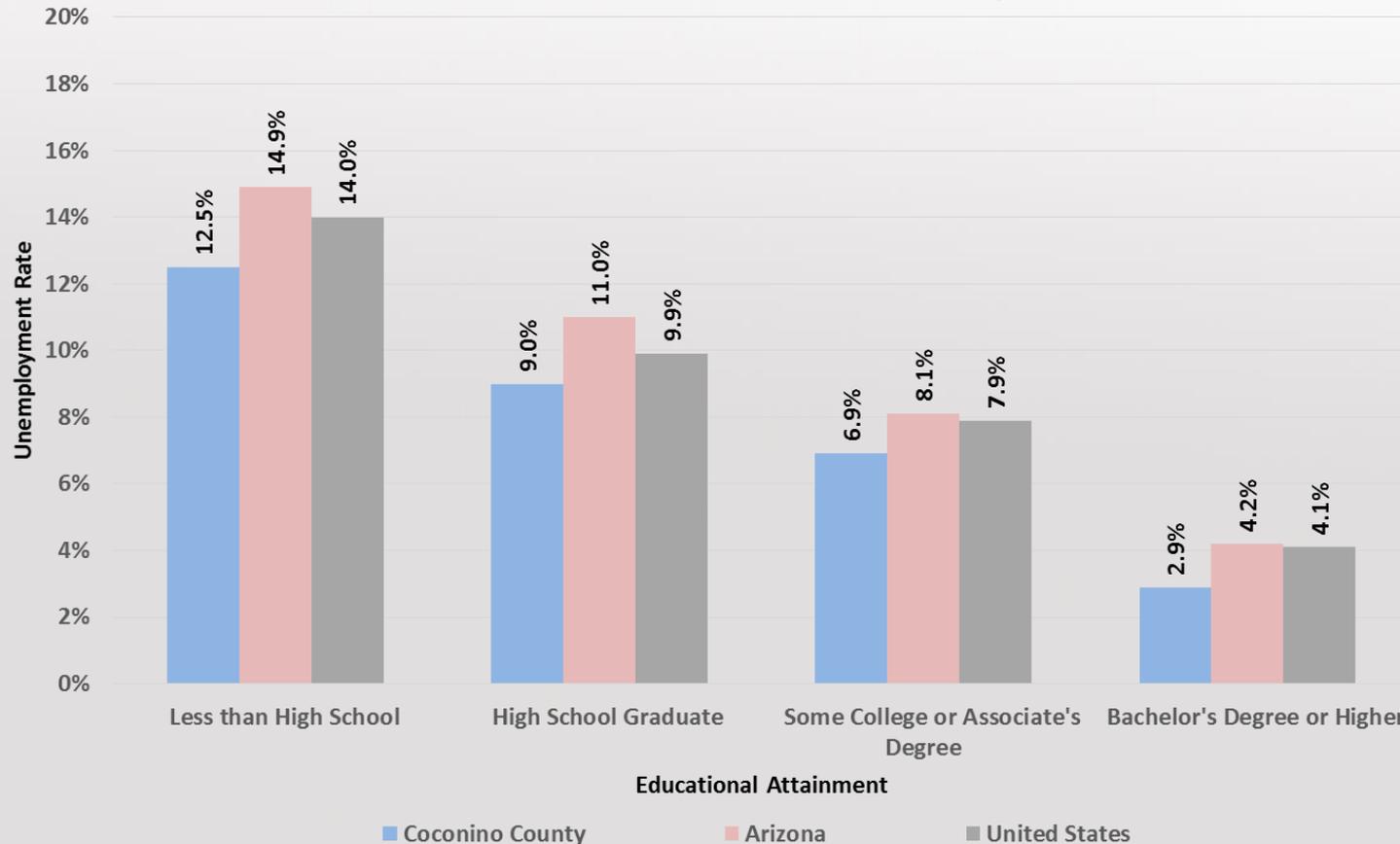
Highest Educational Level Achieved (Population over 25, 2014)

	Coconino County	Arizona	United States
Less than High School	12.3%	14.1%	13.6%
High School Graduate (includes equivalency)	45.8%	50.4%	49.2%
Associate's Degree	9.2%	8.4%	7.9%
Bachelor's Degree	19.6%	17.1%	18.3%
Graduate or Professional Degree	13.2%	10.0%	11.0%

Source: Produced by the Arizona Office of Employment and Population Statistics using 2014 ACS 5-Year Estimates (S1501) in cooperation with the U.S. Census Bureau

- **Coconino County has a very well-educated population**

Unemployment Rates by Educational Attainment (Ages 25-64) Coconino County 2014



Source: Produced by the Arizona Office of Employment and Population Statistics using 2014 ACS 5-Year Estimates (B23006) in cooperation with the U.S. Census Bureau

- **Unemployment decreases with higher levels of education**

Coconino County Public Assistance Households (2014)

	Coconino County	Arizona	United States
TANF (Temporary Assistance for Needy Families)	2.1%	2.5%	2.8%
SSI (Supplemental Security Income)	4.7%	4.2%	5.3%
SNAP (Supplemental Nutrition Assistance Program)	14.5%	13.6%	13.0%
Medicaid/AHCCCS (Arizona Health Care Cost Containment System) (Individuals)	20.1%	20.0%	17.8%

Source: Produced by the Arizona Office of Employment and Population Statistics using 2014 ACS 5-Year Estimates (DP03, S2701) in cooperation with the U.S. Census Bureau

Coconino County Health Insurance (2014)

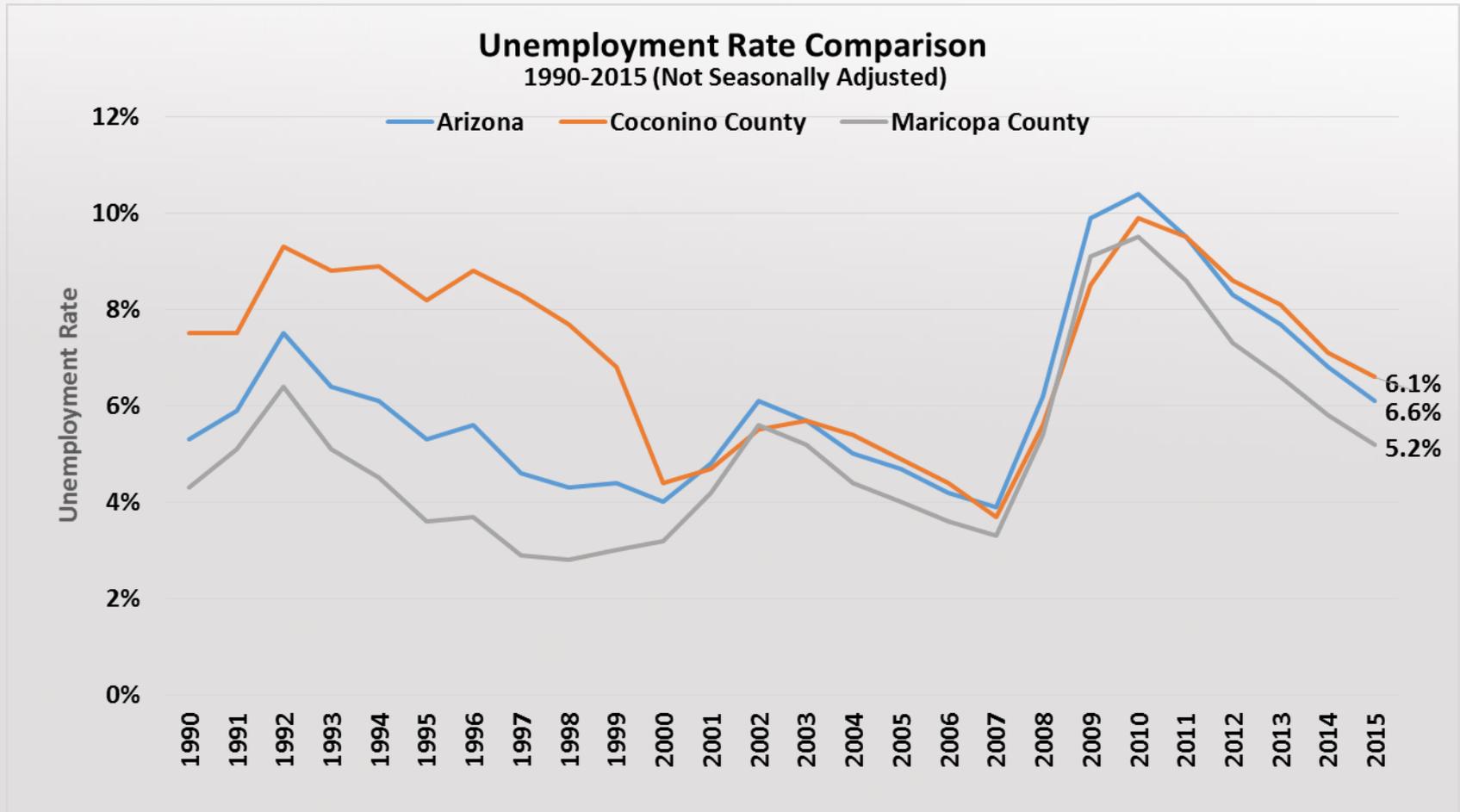
	Coconino County	Arizona	United States
Private Coverage Only (Employer, Direct-Purchase, TRICARE)	45.7%	47.0%	52.7%
Public Coverage Only (Medicare, AHCCCS, Veteran's Admin.)	18.5%	21.1%	17.6%
Both Private and Public Coverage (Some combination of the above, ex. Tricare for Life and Medicare)	16.0%	15.6%	15.5%
Uninsured	19.8%	16.3%	14.2%

Source: Produced by the Arizona Office of Employment and Population Statistics using 2014 ACS 5-Year Estimates (S2701) in cooperation with the U.S. Census Bureau

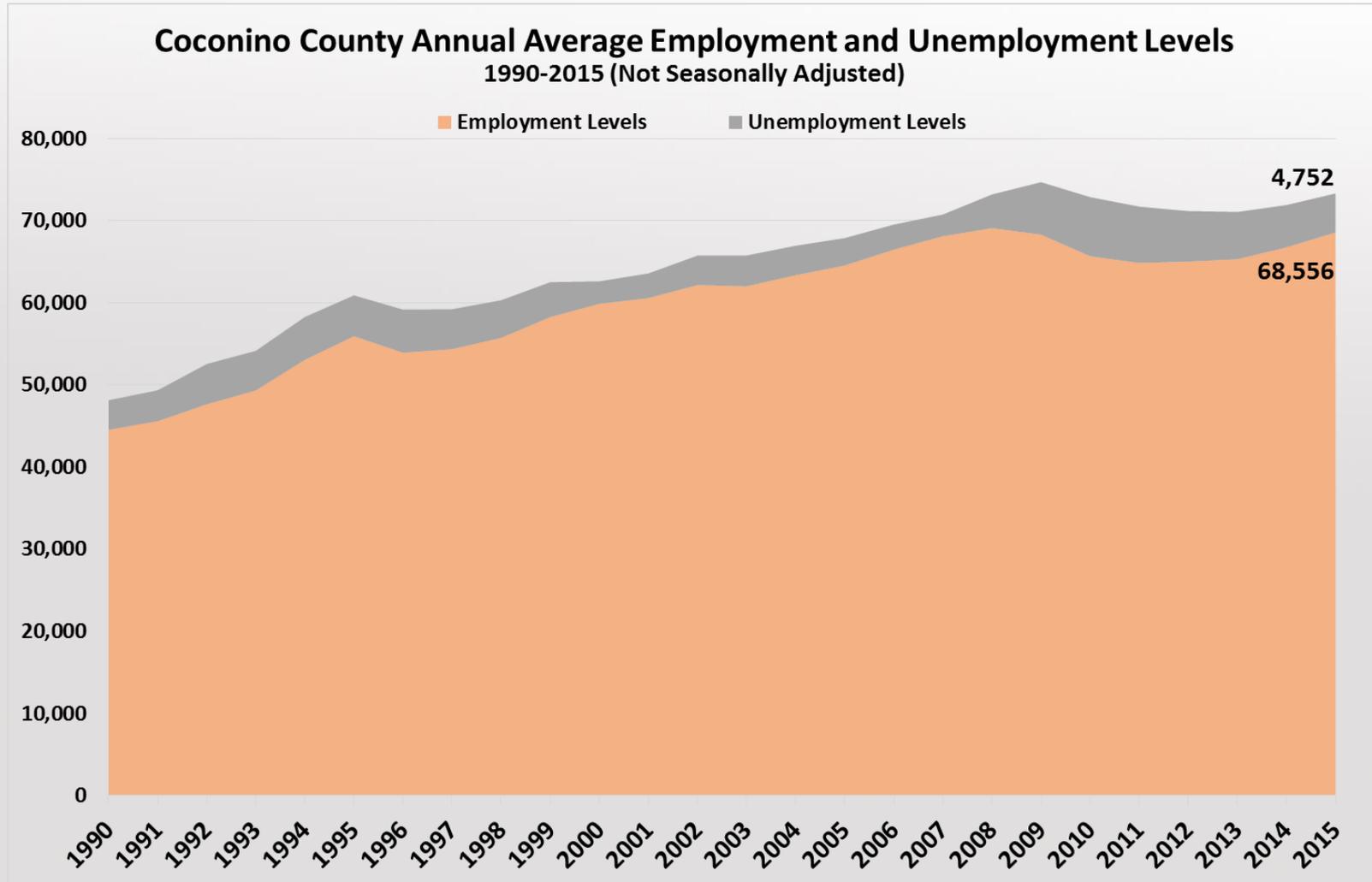
Coconino County Detailed Health Insurance (2014)

	Coconino County	Arizona	United States
Employment-based (private)	47.4%	48.7%	54.7%
Direct-purchase (private)	15.7%	12.5%	12.4%
TRICARE (private)	1.8%	3.2%	2.7%
Medicare (public)	12.3%	16.5%	15.5%
AHCCCS/Medicaid (public)	20.1%	20.0%	17.8%
VA (public)	1.7%	2.7%	2.1%
Uninsured	19.8%	16.3%	14.2%

Source: Produced by the Arizona Office of Employment and Population Statistics using 2014 ACS 5-Year Estimates (S2701) in cooperation with the U.S. Census Bureau

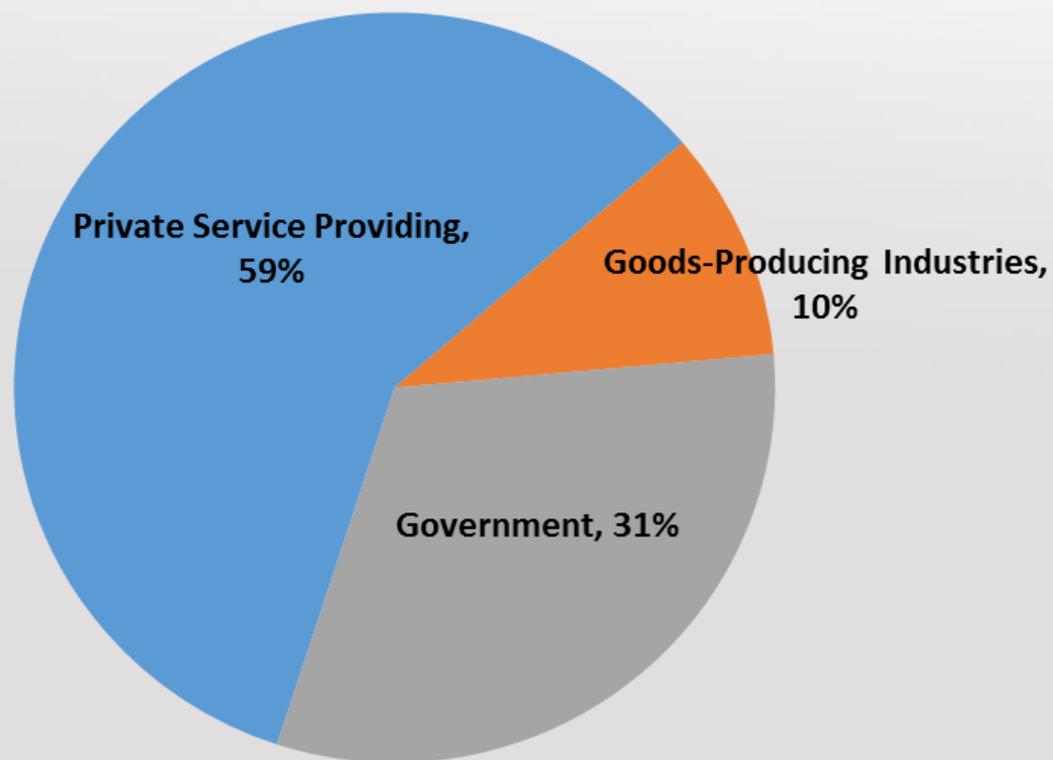


Source: Produced by the Arizona Office of Employment and Population Statistics using LAUS data in cooperation with the U.S. Dept. of Labor, Bureau of Labor Statistics



Source: Produced by the Arizona Office of Employment and Population Statistics using LAUS data in cooperation with the U.S. Dept. of Labor, Bureau of Labor Statistics

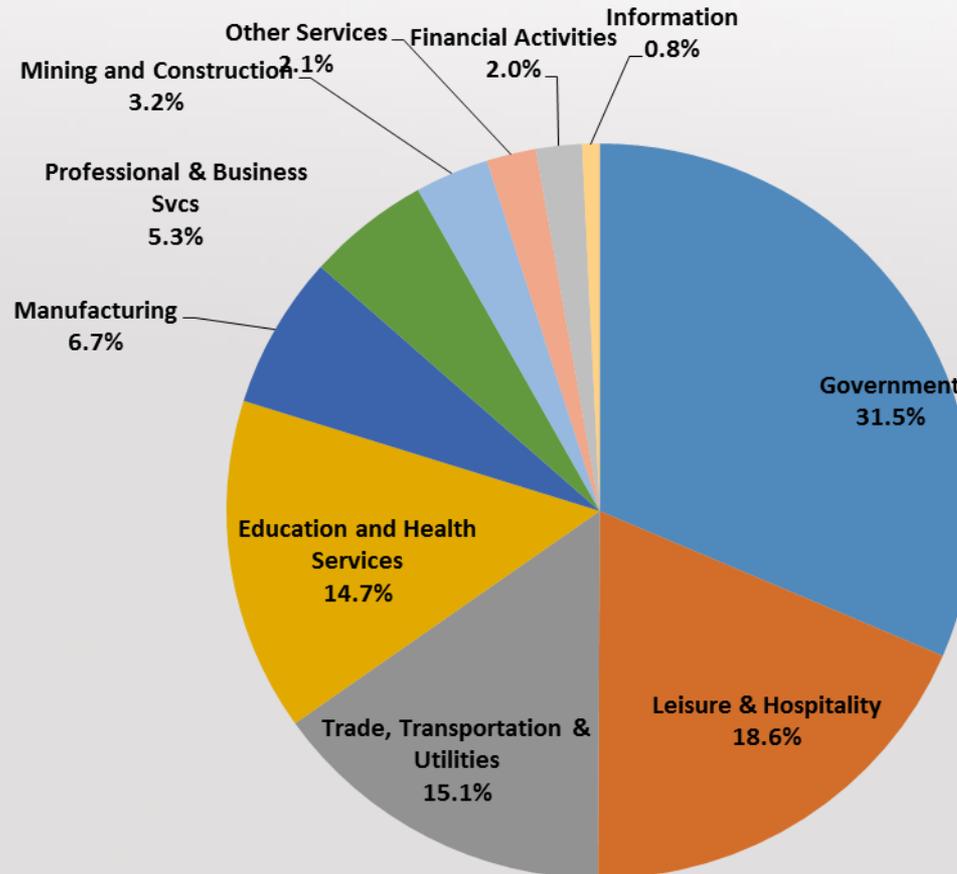
Industry Share of Total Employment Coconino County; March 2016



Source: Produced by the Arizona Office of Employment and Population Statistics using CES data in cooperation with the U.S. Dept. of Labor, Bureau of Labor Statistics

Coconino County Industry Nonfarm Employment Share

March 2016, Not Seasonally Adjusted



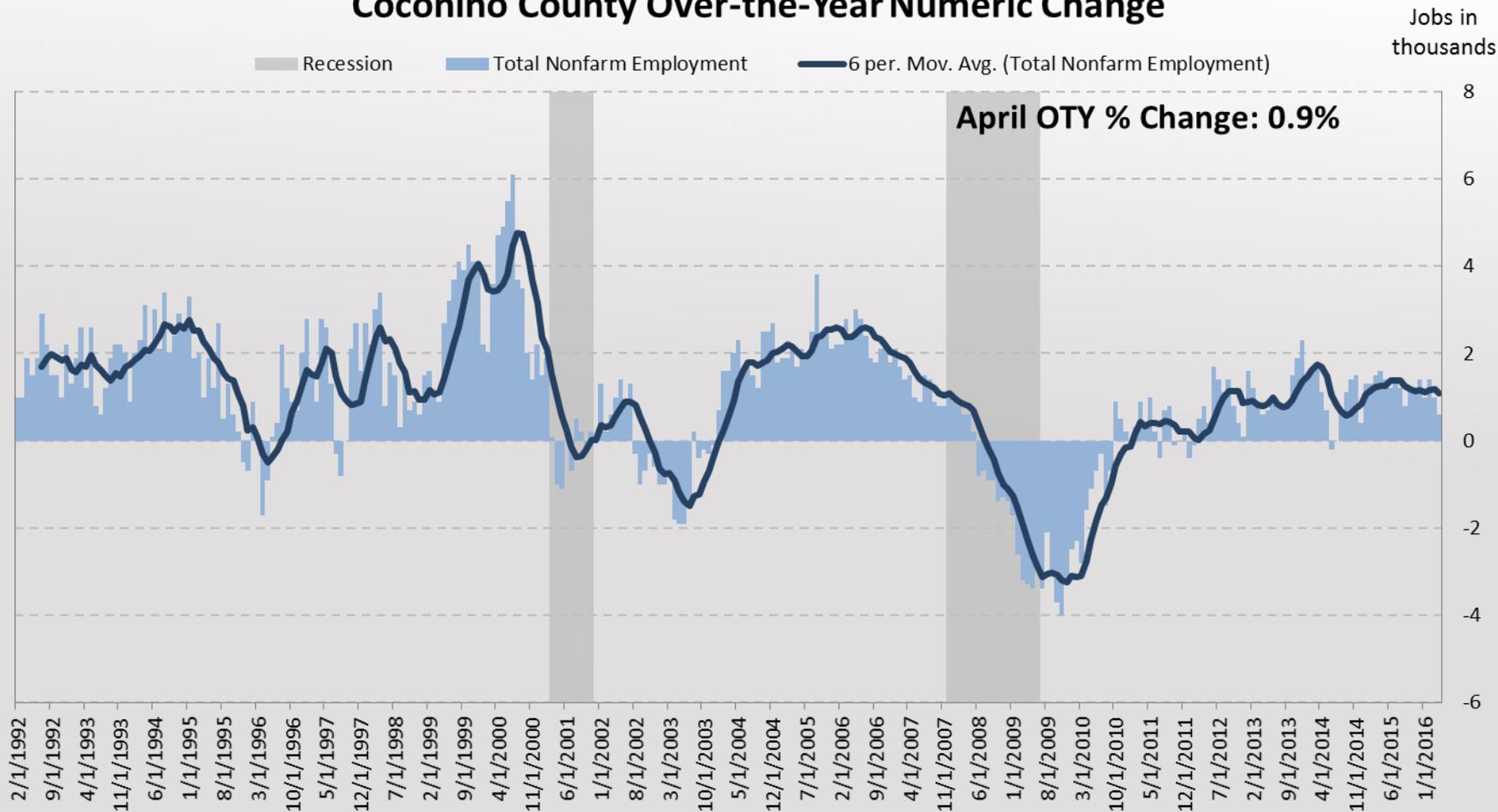
Source: Produced by the Arizona Office of Employment and Population Statistics in cooperation with the U.S. Dept. of Labor, Bureau of Labor Statistics

Coconino County Industry Nonfarm Employment Share 2001 & 2015 Annual Averages

Industry	Employment Share		
	2001	2015	Change
Financial Activities	2.6%	2.0%	-0.6%
Government	34.5%	30.5%	-4.0%
Information	0.9%	0.8%	-0.1%
Leisure & Hospitality	19.1%	20.1%	1.0%
Manufacturing	4.8%	6.7%	1.9%
Mining and Construction	4.6%	3.4%	-1.3%
Other Services	2.7%	2.1%	-0.6%
Professional & Business Svcs	4.4%	5.0%	0.6%
Trade, Transportation & Utilities	15.5%	15.4%	-0.1%
Education and Health Services	10.9%	14.3%	3.4%
Total Nonfarm	100.0%	100.0%	0.0%

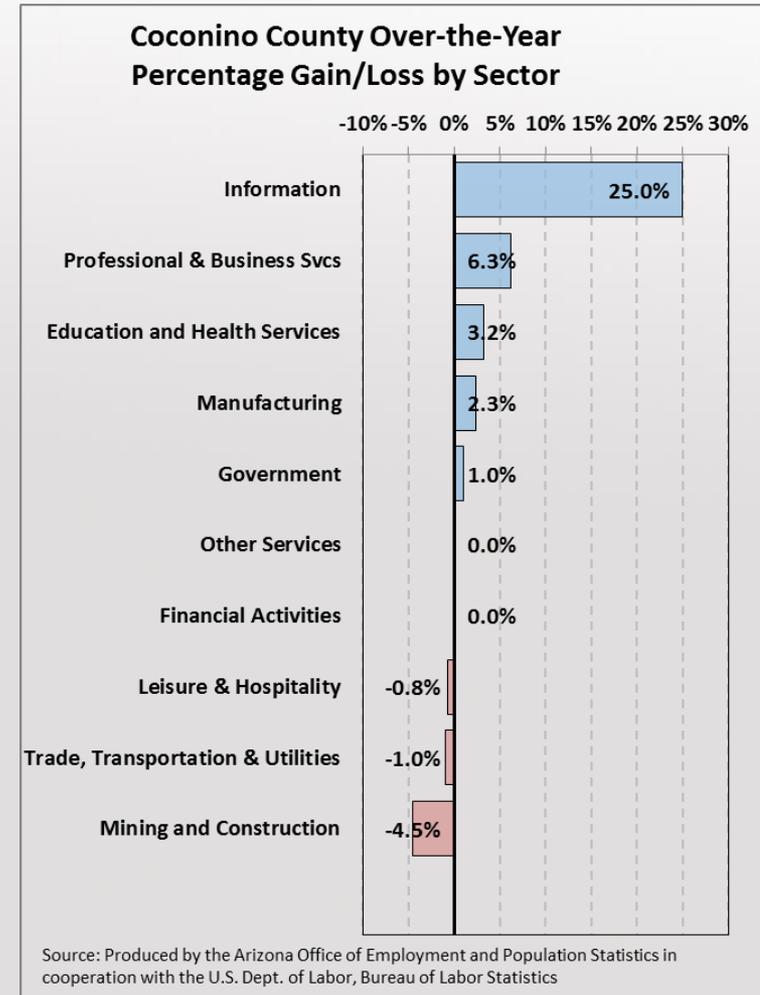
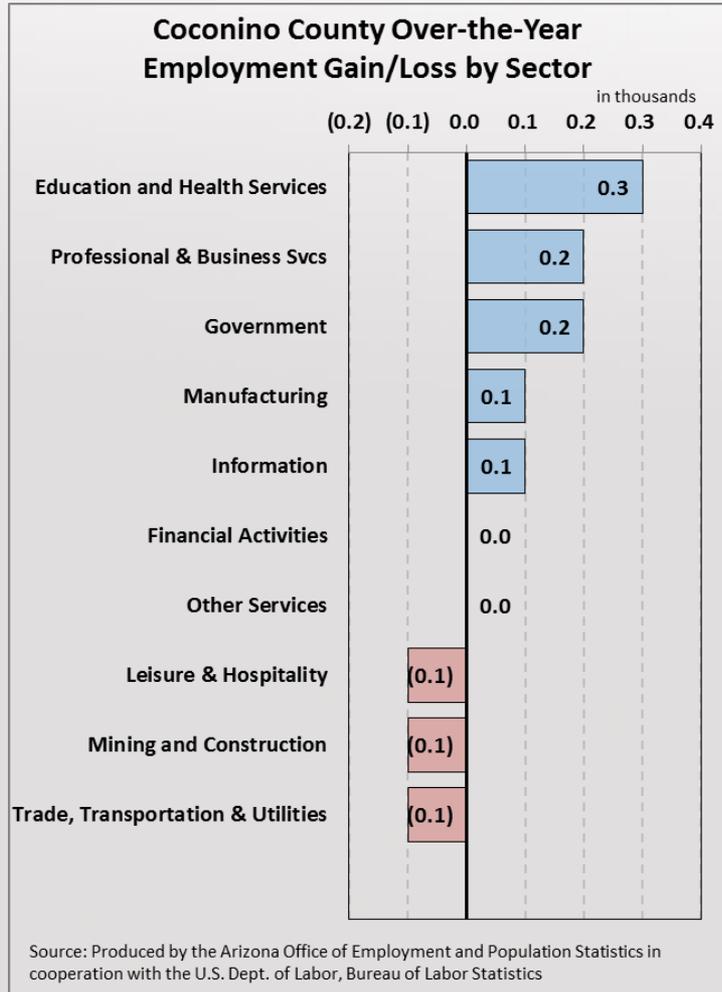
Source: Produced by the Arizona Office of Employment and Population Statistics using LAUS data in cooperation with the U.S. Dept. of Labor, Bureau of Labor Statistics

Coconino County Over-the-Year Numeric Change



Source: Produced by the Arizona Office of Employment and Population Statistics in cooperation with the U.S. Dept. of Labor, Bureau of Labor Statistics

April 2016 Nonfarm Employment Report



Balance of State Short Term Industry Employment Projections 2015-2017

Industry Code	Industry Title	Base Employment 2015 Q2	Projected Employment 2017 Q2	Numeric Change	Percent Change
101100	Natural Resources and Mining	17,983	17,041	-942	-2.7%
101200	Construction	15,620	16,462	842	2.7%
101300	Manufacturing	16,131	16,826	695	2.1%
102100	Trade, Transportation, and Utilities	75,613	78,389	2,776	1.8%
102200	Information	5,274	5,571	297	2.8%
102300	Financial Activities	12,759	13,529	770	3.0%
102400	Professional and Business Services	30,970	33,189	2,219	3.5%
102500	Education and Health Services	87,318	91,973	4,655	2.6%
102600	Leisure and Hospitality	55,209	59,010	3,801	3.4%
102700	Other Services (Except Government)	9,244	9,289	45	0.2%
102800	Government	44,949	45,325	376	0.4%
102900	Unclassified	24,779	26,176	1,397	2.8%

Balance Of State is Arizona less Maricopa, Pinal, and Coconino counties

Source: Prepared by the Arizona Office of Employment and Population Statistics, in cooperation with the U.S. Dept. of Labor, Bureau of Labor Statistics,

Total Employment by Substate Area Employment Change

	2015 Q2(a)	2017Q2(b)	Employment Change
Arizona	2,718,515	2,875,050	156,535
Phoenix MSA ¹	1,952,031	2,077,030	124,999
Tucson MSA ²	370,866	385,259	14,393
Balance of State ³	395,848	412,781	16,933

1) Maricopa and Pinal Counties

2) Pima County

3) Arizona less Maricopa, Pinal and Pima counties

a) Historical

b) Forecast

Source: Produced by the Arizona Office of Employment and Population Statistics using LAUS data in cooperation with the U.S. Dept. of Labor, Bureau of Labor Statistics

Total Employment by Substate Area

Annual Growth Rate (Compound)

	2013 Q3-2015 Q2(a)	2015 Q3- 2017Q2(b)
Arizona	2.41%	2.84%
Phoenix MSA ¹	2.90%	3.15%
Tucson MSA ²	0.56%	1.92%
Balance of State ³	1.84%	2.12%

1) Maricopa and Pinal Counties

2) Pima County

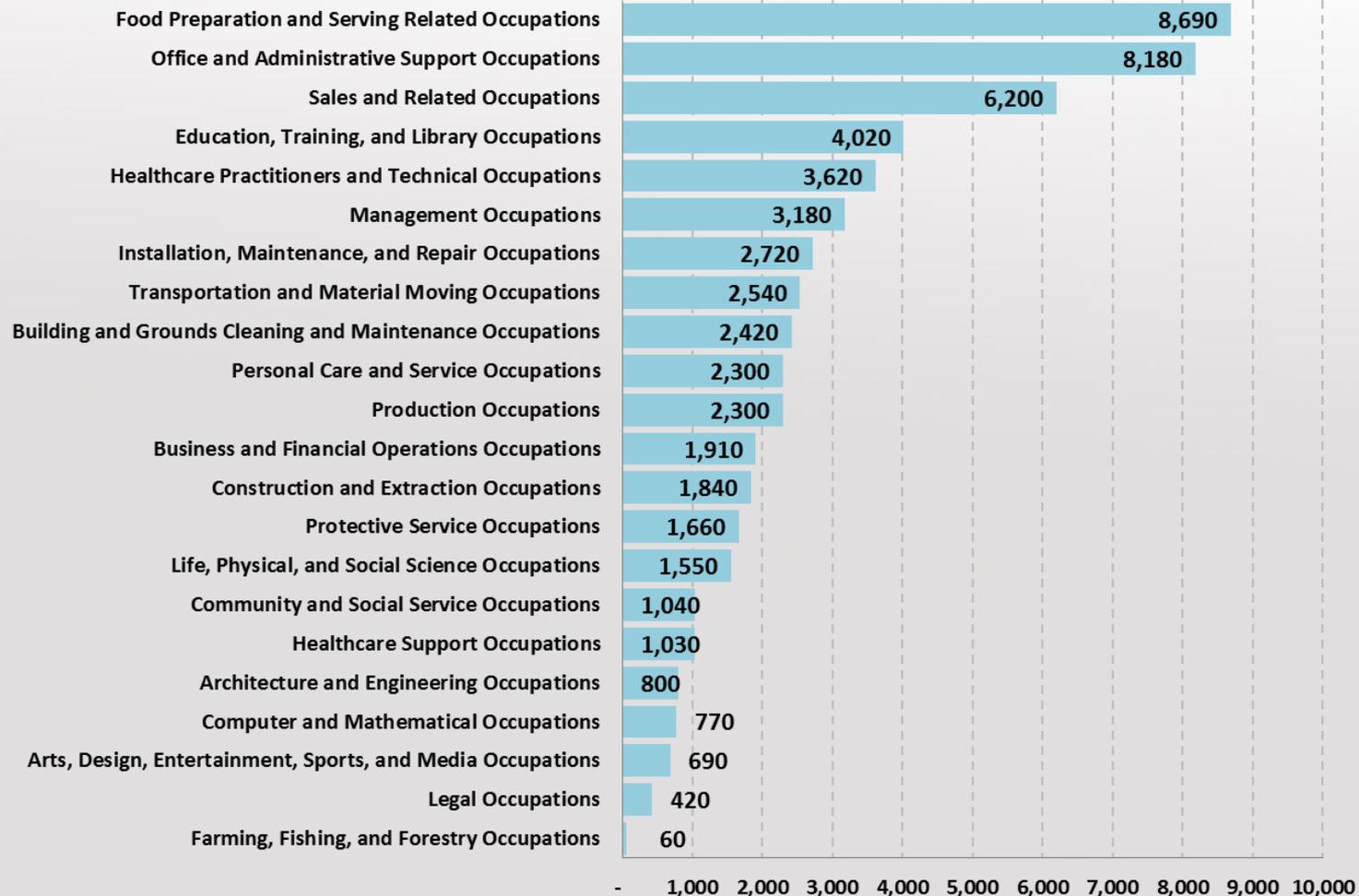
3) Arizona less Maricopa, Pinal and Pima counties

a) Historical

b) Forecast

Flagstaff Major Occupational Groups

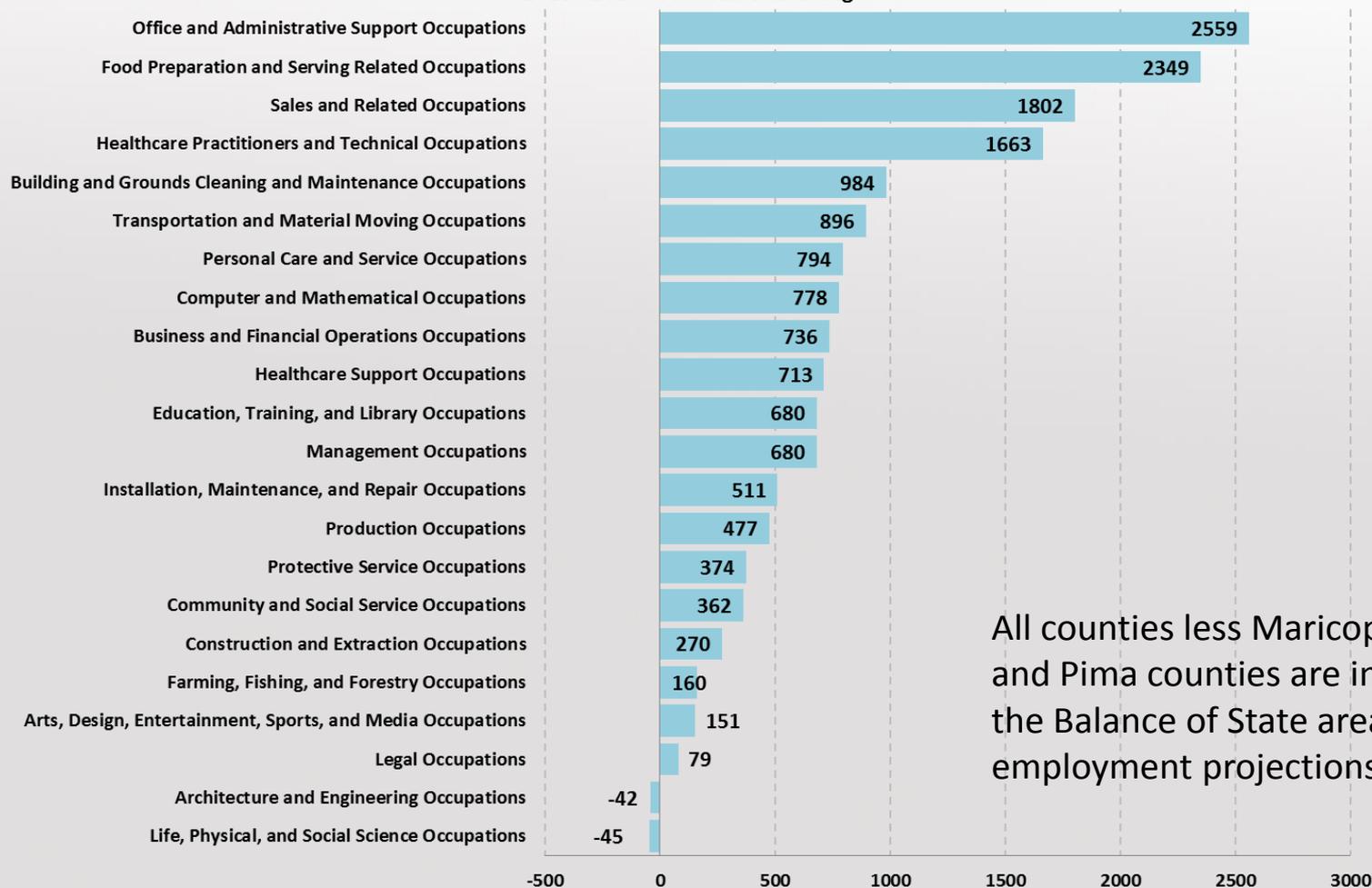
2015 Total Employment



Source: Produced by the Arizona Office of Employment and Population Statistics using LAUS data in cooperation with the U.S. Dept. of Labor, Bureau of Labor Statistics

Balance of State Major Occupational Groups

2015 - 2017 Total Numeric Change

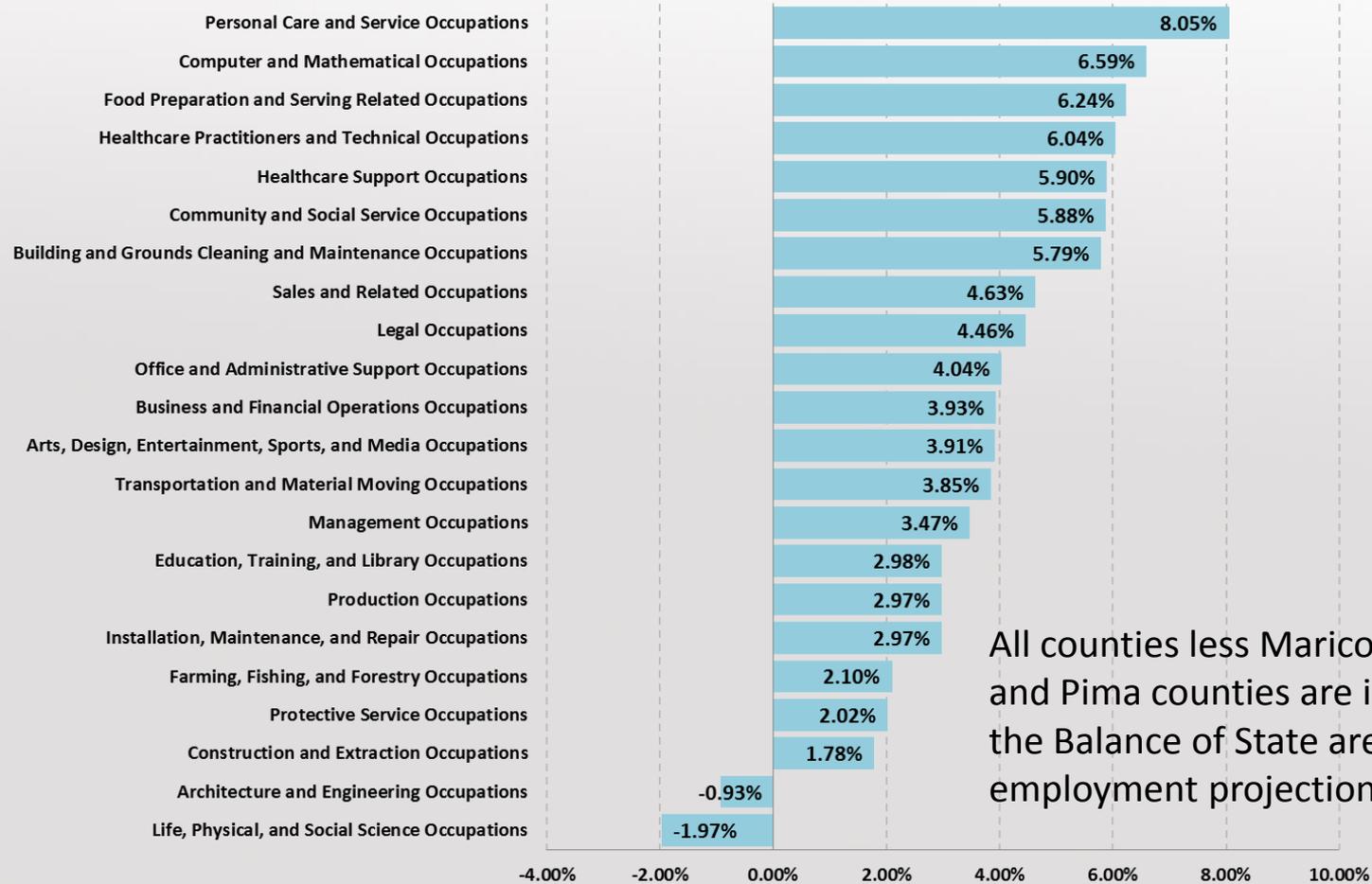


All counties less Maricopa, Pinal, and Pima counties are included in the Balance of State area for employment projections

Source: Produced by the Arizona Office of Employment and Population Statistics using OES data in cooperation with the U.S. Dept. of Labor, Bureau of Labor Statistics

Balance of State Major Occupational Groups

2015 - 2017 Total Percentage Change



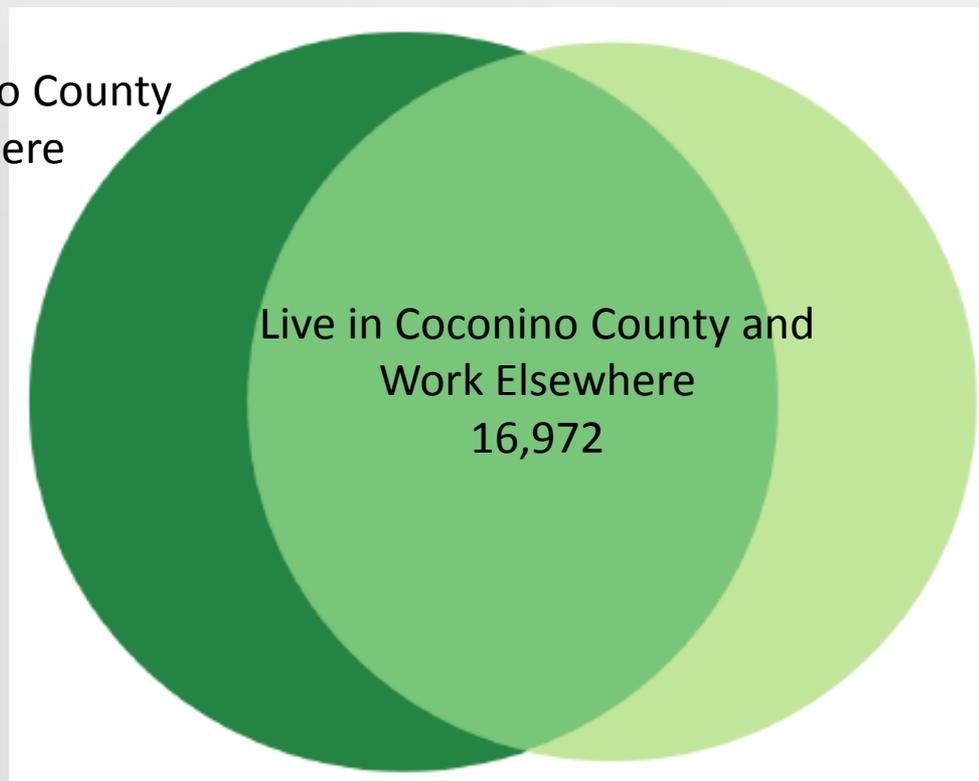
All counties less Maricopa, Pinal, and Pima counties are included in the Balance of State area for employment projections

Source: Produced by the Arizona Office of Employment and Population Statistics using OES data in cooperation with the U.S. Dept. of Labor, Bureau of Labor Statistics

Coconino County Commuting Patterns

Coconino County 2014

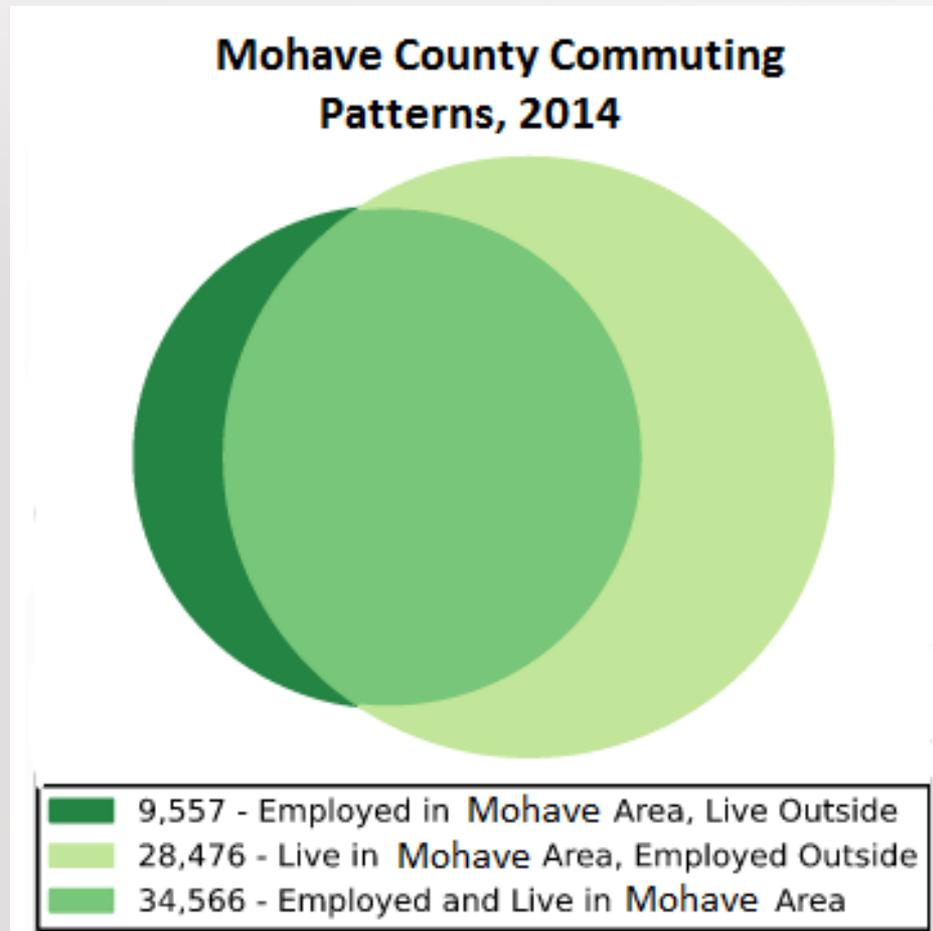
Employed in Coconino County
and Live Elsewhere
19,902



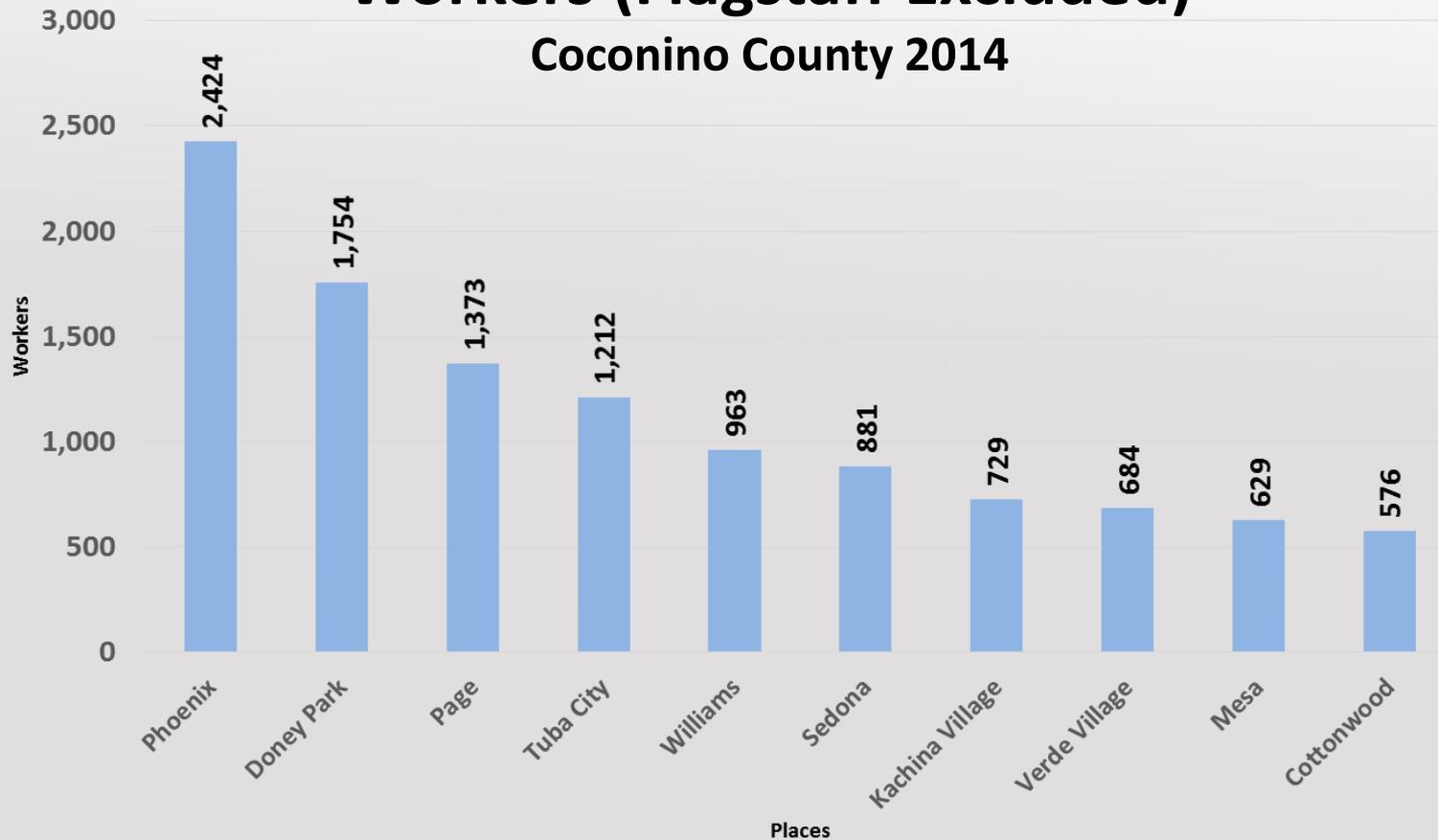
Employed and Live in
Coconino County
32,818

Source: Produced by the Arizona Office of Employment and Population Statistics using On The Map in cooperation with the U.S. Census Bureau

Compared with Mohave County Commuting Patterns

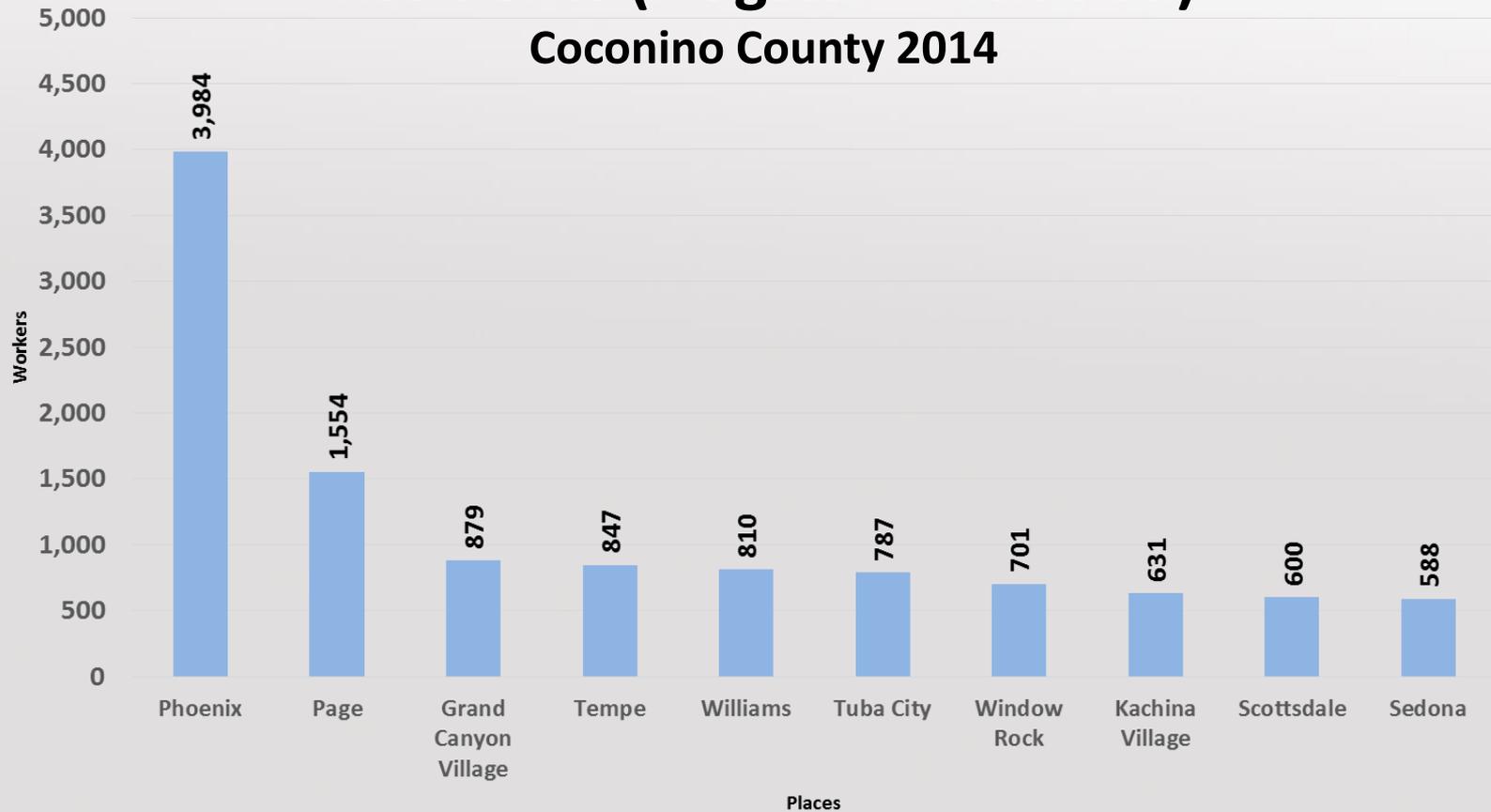


Top 10 Places of Residence for Coconino County Workers (Flagstaff Excluded)



Source: Produced by the Arizona Office of Employment and Population Statistics using On The Map in cooperation with the U.S. Census Bureau

Top 10 Places of Employment for Coconino County Residents (Flagstaff Excluded)



Source: Produced by the Arizona Office of Employment and Population Statistics using On The Map in cooperation with the U.S. Census Bureau

Existing and Emerging Demand Industries and Occupations

Methodology

- Objective:
 - To identify industries and occupations with favorable labor market traits that support long-term economic and workforce strategies
- Labor market traits include:
 - High employment and wage growth
 - Projected long-term employment growth
 - Competitive advantages in employment and wages

Existing and emerging demand industries were selected based on their overall performance in each labor market indicator category, and an overall ranking score was calculated

Methodology cont.

Labor market variables were given different weights depending on the importance of each variable when defining existing and emerging demand industry requirements

- **Existing demand industries** were identified as industries with large employment bases and above-average wages
- **Emerging demand industries** were identified as industries with small employment levels and large short-term historic employment and wage growth

Location Quotient (LQ)

- A location quotient (LQ) is measurement of a region's industrial specialization relative to a larger geographic unit (usually the nation)
- It allows a subject area's distribution of employment by industry to be compared to a base area's distribution
 - Subject Area: Arizona
 - Base Area: United States
- Allows comparison of relative employment and wage levels in the United States, states, counties, & MSAs

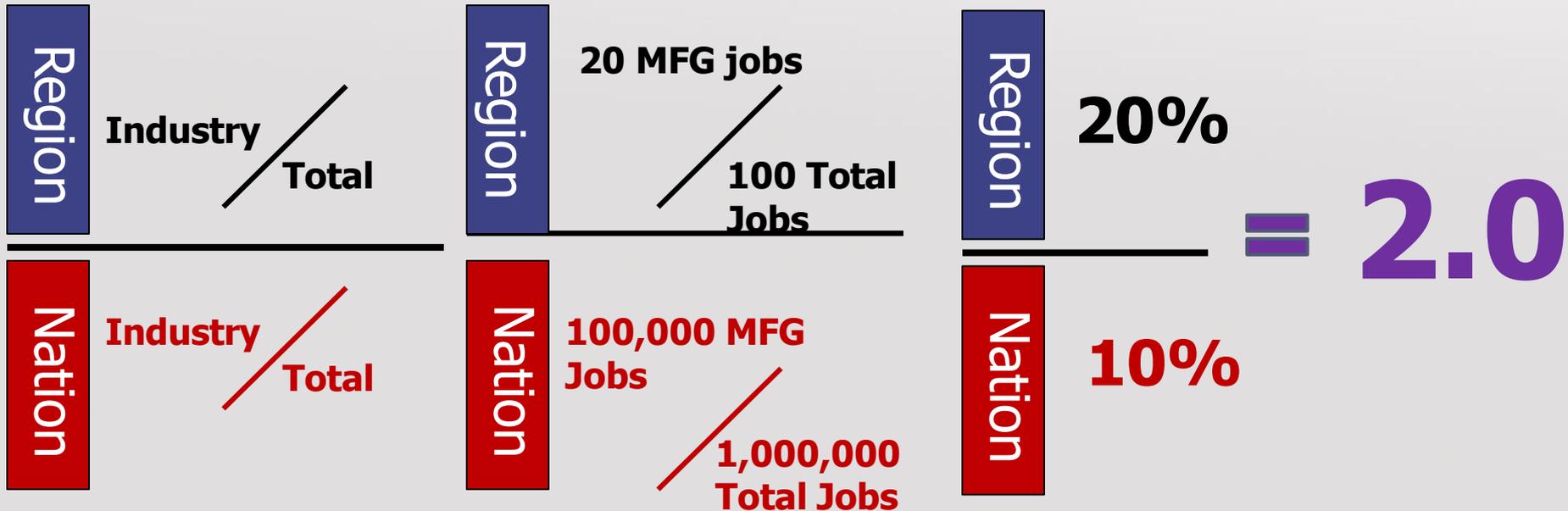
Location Quotient (LQ) Formula

Formula

Job Example

Percent

LQ



Location Quotient Calculated

How to interpret:

- $LQ = 1$: The industry has the same share of employment/wages as the reference area
- $LQ > 1$: The industry has a higher share of employment/wages as the reference area
- $LQ < 1$: The industry has a lower share of employment/wages as the reference area

Example: an LQ of 1.0 in mining means that the region and the nation are equally specialized in mining; while an LQ of 1.8 means that the region has a higher concentration in mining than the nation.

Model Weighting Structure

Coconino County

Existing Demand Industry Detail

Variables	Weight	Constraints	Detail	Period
Average Employment Level	2	Top 33%	3-Digit Industry	2014-2015
Average Weekly Wage Level	3	Top 50%	3-Digit Industry	2014-2015
Employment Growth Numeric	1	na	3-Digit Industry	2014-2015
Employment Growth Percentage	1	na	3-Digit Industry	2014-2015
Average Wage Growth Numeric	1	na	3-Digit Industry	2014-2015
Average Wage Growth Percentage	1	na	3-Digit Industry	2014-2015
Employment Location Quotient	2	na	3-Digit Industry	2014-2015
Wage Location Quotient	2	na	3-Digit Industry	2014-2015
Employment Growth Numeric	1	na	2-Digit Super Sector	2011-2015
Employment Growth Percentage	1	na	2-Digit Super Sector	2011-2015
Employment Share Change	1	na	2-Digit Super Sector	2011-2015
Projected Employment Growth Numeric	1	na	2-Digit Super Sector	2012-2022
Projected Employment Growth Percentage	1	na	2-Digit Super Sector	2012-2022

Existing and Emerging Demand Industries were selected based on thirteen employment characteristics

Industries were ranked by each economic variable individually and then averaged together to calculate an overall industry ranking

Coconino County							
Existing Demand Industry Detail				VARIABLE RANKINGS			
Overall Rank	3-Digit NAICS Industry	Average Employment Level	Average Weekly Wage Level	Employment Growth	Average Wage Growth	Employment Location Quotient	Wage Location Quotient
1	NAICS 621 Ambulatory health care services	1	1	5	3	3	1
2	NAICS 441 Motor vehicle and parts dealers	4	3	1	1	2	2
3	NAICS 238 Specialty trade contractors	2	5	2	2	4	3
4	NAICS 541 Professional and technical services	3	2	3	4	5	5

Economic data are available to reference for each existing and emerging demand industry identified

Economic data is provided at the two- and three-digit industry NAICS code; depending on the available detail of the data used

Coconino County

Existing Demand Industry Detail

NAICS 621 Ambulatory health care services

Average Employment Level <i>(3-Digit Industry; 2014-2015)</i>	2,937
Average Weekly Wage Level <i>(3-Digit Industry; 2014-2015)</i>	\$1,020
Employment Growth <i>(3-Digit Industry; 2014-2015)</i>	1.6%
Average Wage Growth <i>(3-Digit Industry; 2014-2015)</i>	1.3%
Employment Location Quotient <i>(3-Digit Industry; 2014-2015)</i>	1.0
Wage Location Quotient <i>(3-Digit Industry; 2014-2015)</i>	1.2
Employment Growth <i>(2-Digit Super Sector; 2011-2015)</i>	3.3%
Employment Share Change <i>(2-Digit Super Sector; 2011-2015)</i>	1.8%
Projected Employment Growth <i>(2-Digit Super Sector; 2012-2022)</i>	2.9%

Existing Demand Occupations

Coconino County

Existing Demand Industry Detail

NAICS 621 Ambulatory health care services

Rank	Occupation Title	Industry Employment Share
1	Physician assistants	1.5%
2	Nurse practitioners	1.5%
3	Medical Secretaries	9.2%
4	Family and general practitioners	2.0%
5	First-Line Supervisors of Office and Administrative Support Workers	2.9%

Top occupations within each industry were identified by wage, employment growth and employment share characteristics

Coconino County

Existing Demand Occupation Detail

Physician assistants

SOC Code	29-1071
Education Requirement	Master's degree
Work Experience Requirement	None
On-the-Job Training Requirement	None
Knowledge Requirement	Medicine and Dentistry
Skill Requirement	Reading Comprehension
Ability Requirement	Oral Comprehension
Employment Level	60
<i>(6-Digit SOC Code; 2014)</i>	
Average Hourly Wage	\$53.3
<i>(6-Digit SOC Code; 2014)</i>	
Projected Employment Growth	4.9%
<i>(2-Digit Super Sector; 2012-2022)</i>	
Industry Employment Share	1.5%
<i>(6-Digit SOC Code; 2014)</i>	

Occupation requirements are provided to identify the needs of employers

Considerations:

- The analysis provided identifies industries with favorable labor market trends
- Ultimately, local areas are responsible for selecting their own existing and emerging demand industries and occupations to highlight within their local plans
- The process utilized to identify existing and emerging demand industries and occupations does not factor in:
 - existing government initiatives
 - industry support
 - on-the-ground community involvement
- However, this analysis can be extremely useful when coupled with local insight to identify well-rounded existing and emerging industries and occupations within the local areas

Data Sources

LaborStats.az.gov

Employment Data:

laborstats.az.gov/employment

Unemployment Data:

laborstats.az.gov/unemployment

Wage & Income Data:

laborstats.az.gov/wages-income

Employment Projections Data:

laborstats.az.gov/employment-forecasts

Population Data:

laborstats.az.gov/population

Other Labor Market Sources

Commuting Patterns Data:

On the Map: onthemap.ces.census.gov/

Demographics Data:

American Community Survey: census.gov/programs-surveys/acs/

Personal Income & State GDP Data:

US Bureau of Economic Analysis: bea.gov/regional/index.htm

Interactive Employment Mapping:

Maricopa Association of Governments: <http://geo.azmag.gov/maps/azdemographics/>

Skills and Training Requirement Data:

O*NET: onetonline.org/find/descriptor/browse

Contact Information

Website: <https://laborstats.az.gov>

Phone: 602.771.2222

General Email: labor.info@azstats.gov

Doug Walls Email: doug.walls@azdoa.gov