

# Labor Market Information

## Maricopa County LWIA

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Office of Employment and Population Statistics  
Arizona Department of Administration

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## AGENDA

- LMI in WIOA Local Plans
- Economic Overview
  - Local Demographics
    - Individuals with Barriers to Entry
  - Unemployment
  - Industry Growth
- Existing and Emerging In-Demand Industries and Occupations
- Characteristics of High Unemployment
- 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, **including employment needs** in in-demand industry sectors and occupations
  - 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**

## **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

## MARICOPA COUNTY LWIA

## How to use data:

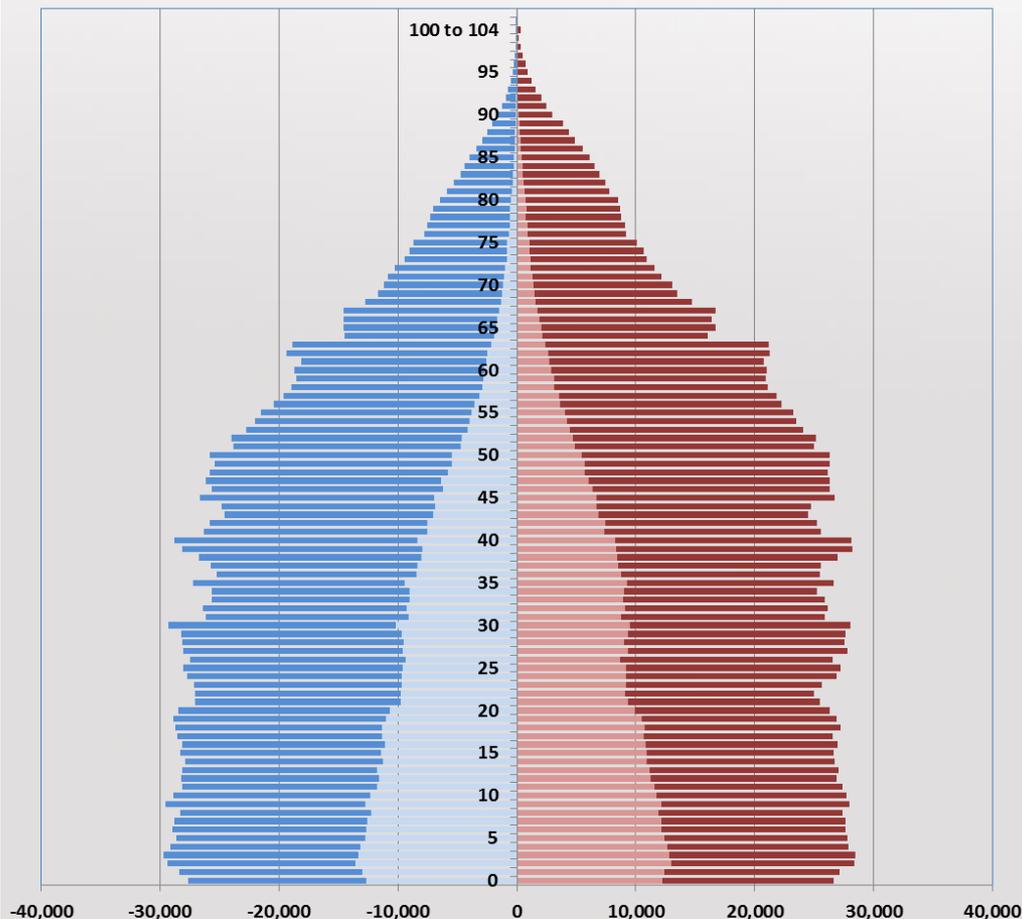
- Use data to drive decision, not validate decisions
- **Use more than one source of data** – don't lock yourself into a single estimate, consider all of the available data to get the most accurate picture
- **Know the limitations of your data set** – it's easy to accidentally misuse data and draw erroneous 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

## Maricopa County Population

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



# Maricopa County

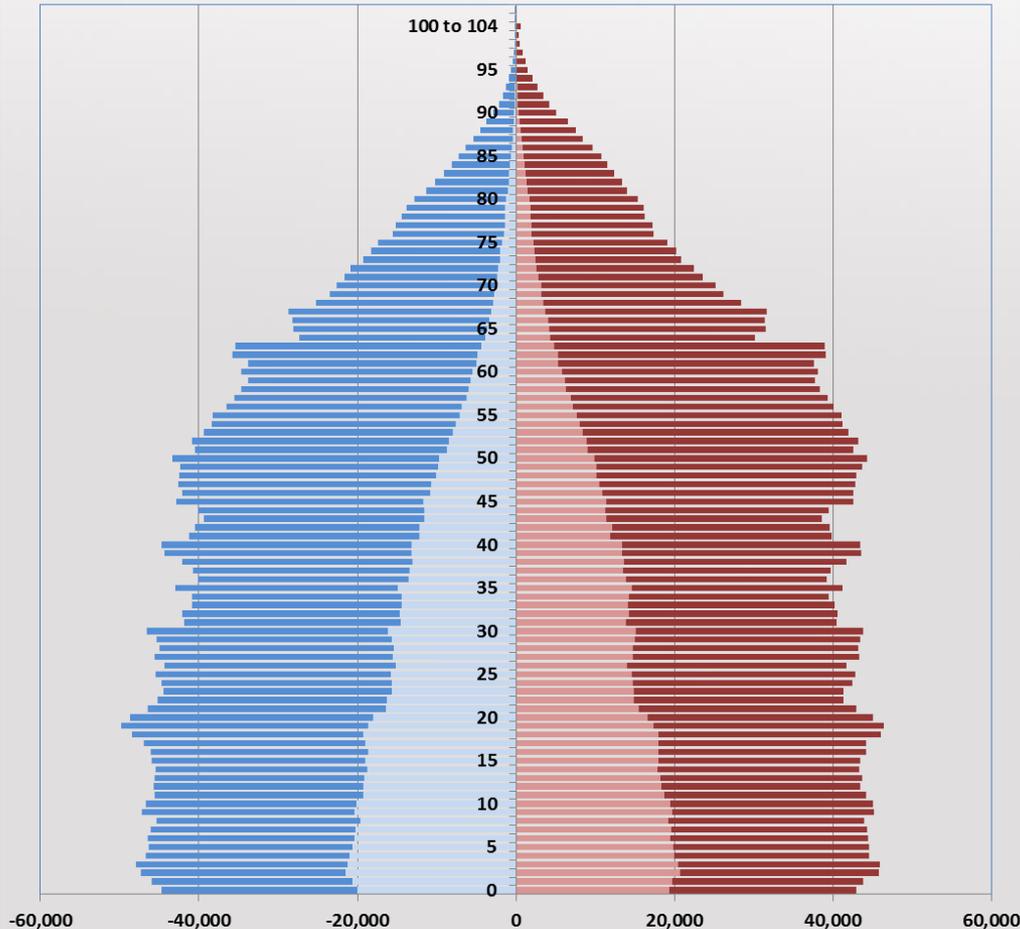
Census 2010

**Total Population:** 3,817,117

<b>Hispanic</b>	1,128,741	29.6%
<b>Male</b>	568,138	14.9%
<b>Female</b>	560,603	14.7%
<b>Non-Hispanic</b>	2,688,376	70.4%
<b>Male</b>	1,320,327	34.6%
<b>Female</b>	1,368,049	35.8%
<b>Under 17</b>	952,744	25.0%
<b>Age 17 - 24</b>	433,734	11.4%
<b>Age 25 - 34</b>	541,126	14.2%
<b>Age 35 - 44</b>	524,598	13.7%
<b>Age 45 - 54</b>	503,965	13.2%
<b>Age 55 - 64</b>	398,309	10.4%
<b>Over 64</b>	462,641	12.1%

## Arizona Population

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



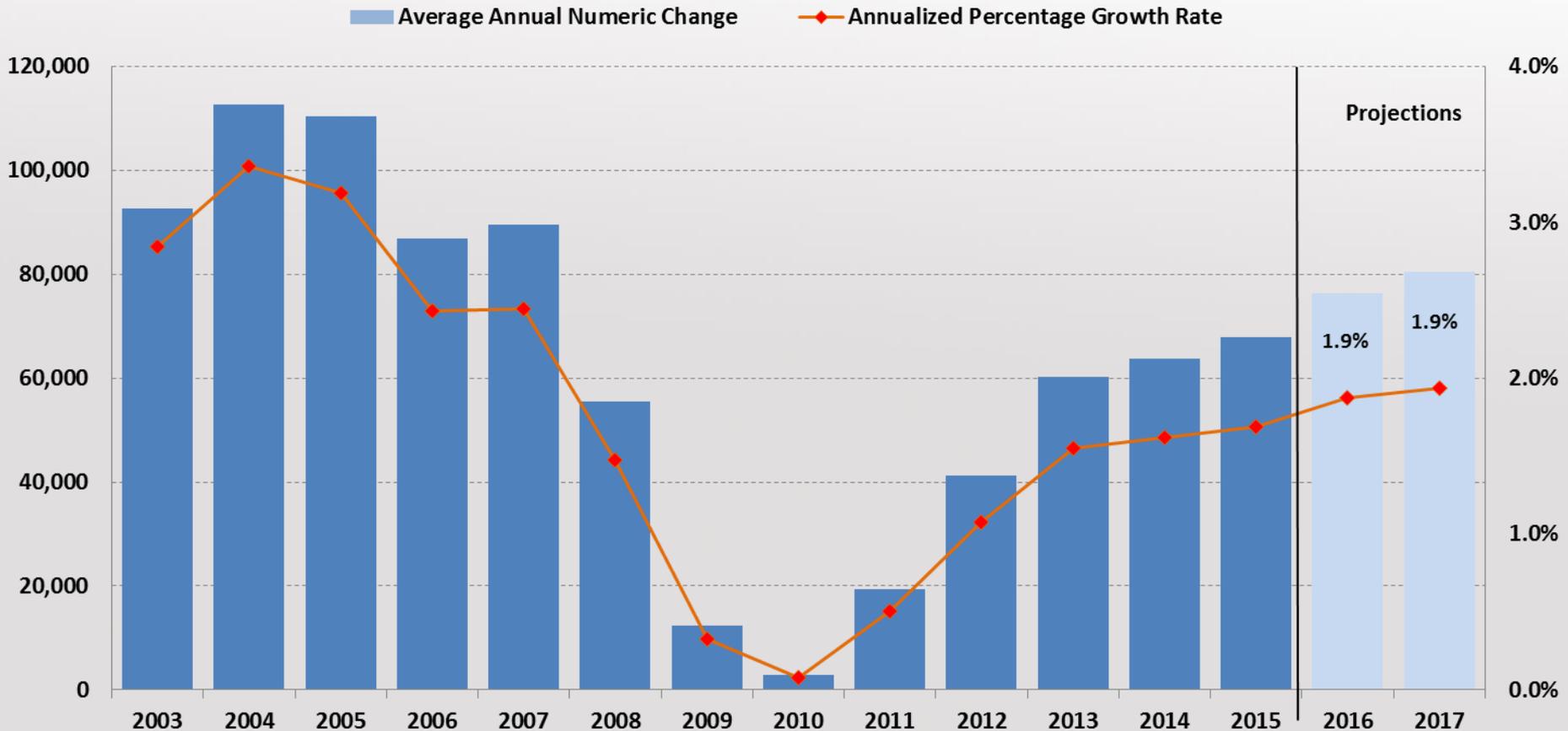
# Arizona

Census 2010

**Total Population:** 6,392,017

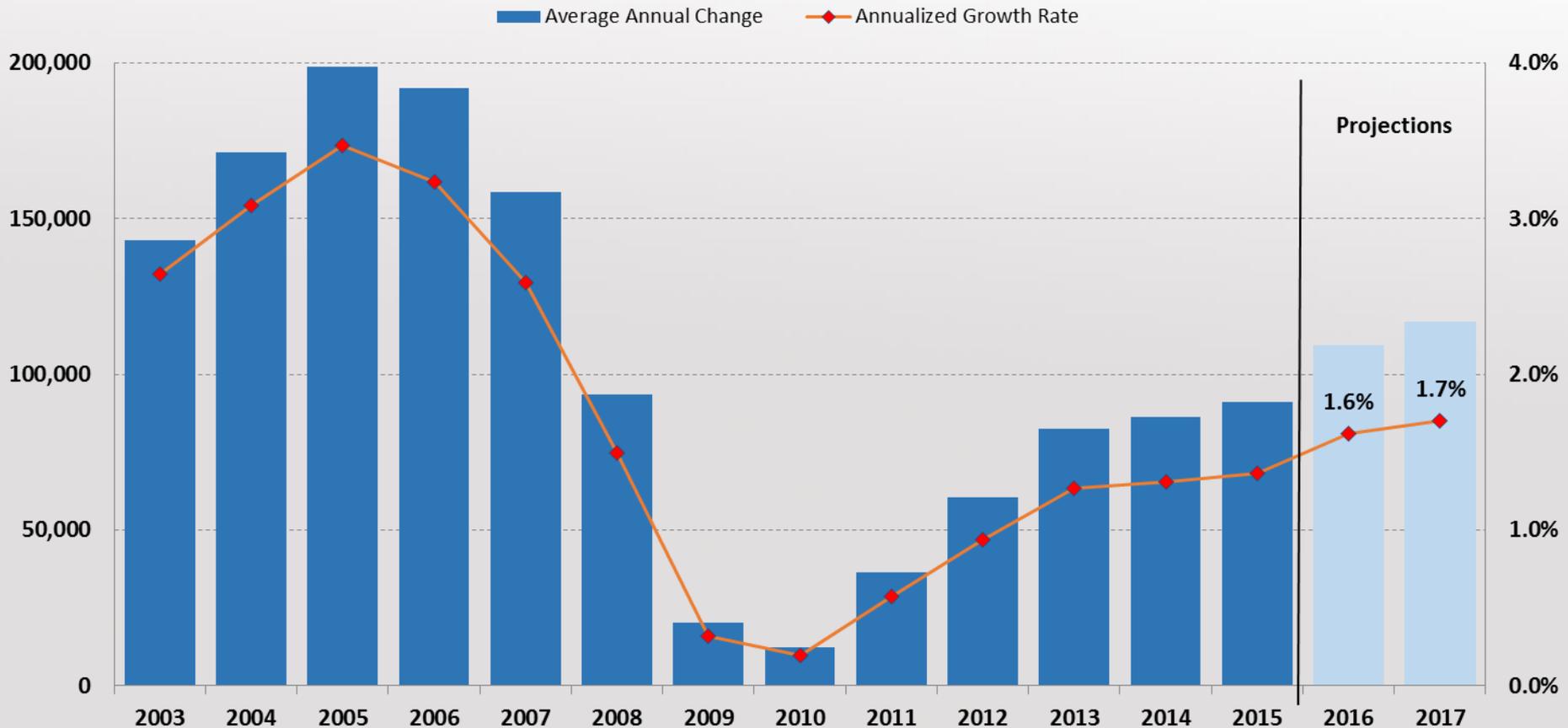
<b>Hispanic</b>	1,895,149	29.6%
<b>Male</b>	951,790	14.9%
<b>Female</b>	943,359	14.8%
<b>Non-Hispanic</b>	4,496,868	70.4%
<b>Male</b>	2,224,033	34.8%
<b>Female</b>	2,272,835	35.6%
<b>Under 17</b>	1,537,878	24.1%
<b>Age 17 - 24</b>	724,347	11.3%
<b>Age 25 - 34</b>	856,693	13.4%
<b>Age 35 - 44</b>	822,494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

## Maricopa County'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

## 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

## Maricopa County Quick Facts (2014)

	Maricopa County	Harris County	Arizona	United States
Median Household Income	\$53,689	\$53,822	\$49,928	\$53,482
Median Age	35.3	32.6	36.5	37.4
Individuals with a Disability Between 18-64	8.4%	8.0%	9.9%	10.2%
Veterans	8.8%	5.8%	10.0%	8.3%
Poverty Status	17.1%	18.4%	18.2%	15.6%
Mean Travel Time to Work	25:24	27:12	24:42	25:42
Civilian Labor Force Participation Rate	63.6%	68.4%	59.7%	63.5%
Population over 16	3,047,709	3,218,390	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

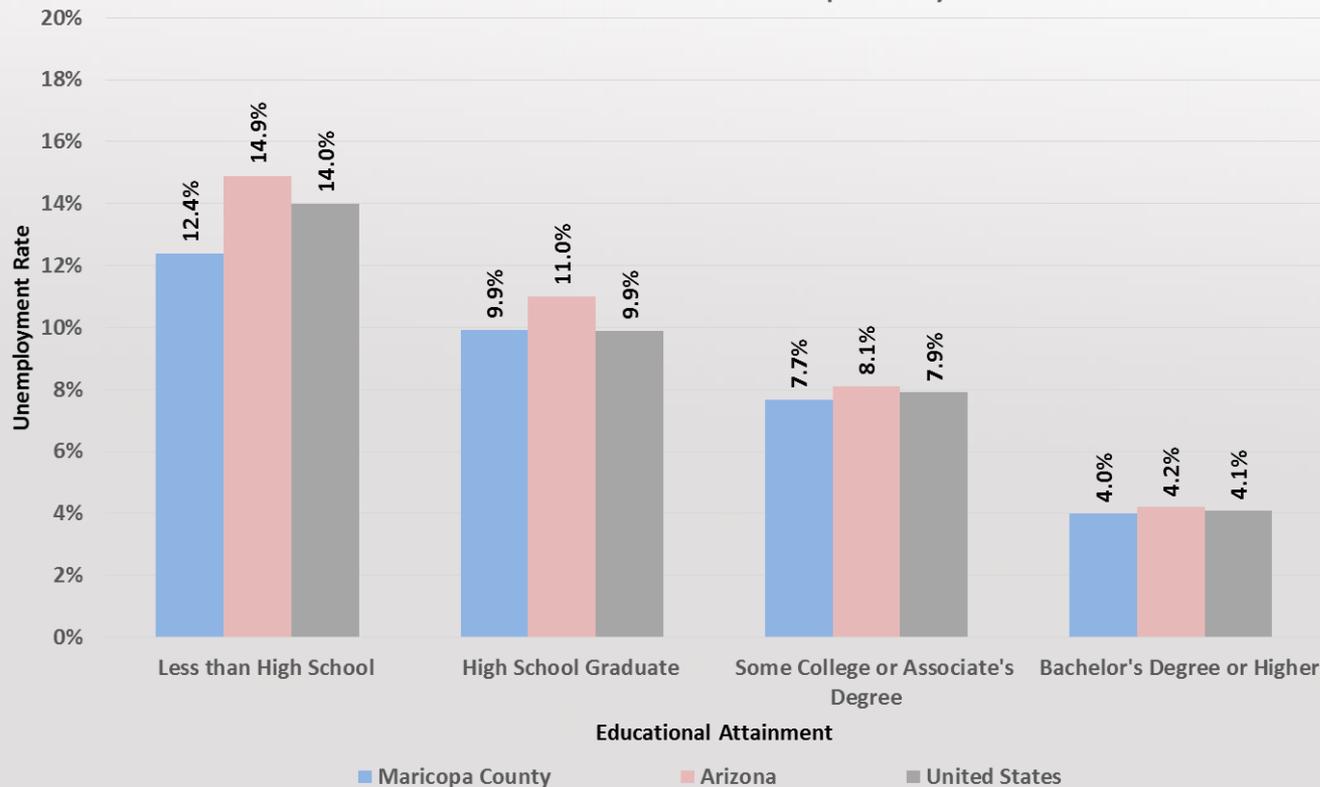
# Highest Educational Level Achieved (Population over 25, 2014)

	Maricopa County	Harris County	Arizona	United States
Less than High School	13.4%	20.8%	14.1%	13.6%
High School Graduate (includes equivalency)	48.3%	44.3%	50.4%	49.2%
Associate's Degree	8.4%	5.8%	8.4%	7.9%
Bachelor's Degree	19.2%	18.7%	17.1%	18.3%
Graduate or Professional Degree	10.7%	10.3%	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

## Unemployment Rates by Educational Attainment (Ages 25-64)

Maricopa 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**

## Maricopa County Public Assistance Households (2014)

	<b>Maricopa County</b>	<b>Harris County</b>	<b>Arizona</b>	<b>United States</b>
<b>TANF (Temporary Assistance for Needy Families)</b>	2.2%	1.6%	2.5%	2.8%
<b>SSI (Supplemental Security Income)</b>	3.5%	4.2%	4.2%	5.3%
<b>SNAP (Supplemental Nutrition Assistance Program)</b>	12.0%	13.0%	13.6%	13.0%
<b>Medicaid/AHCCCS (Arizona Health Care Cost Containment System) (Individuals)</b>	18.0%	19.0%	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

## Maricopa County Health Insurance (2014)

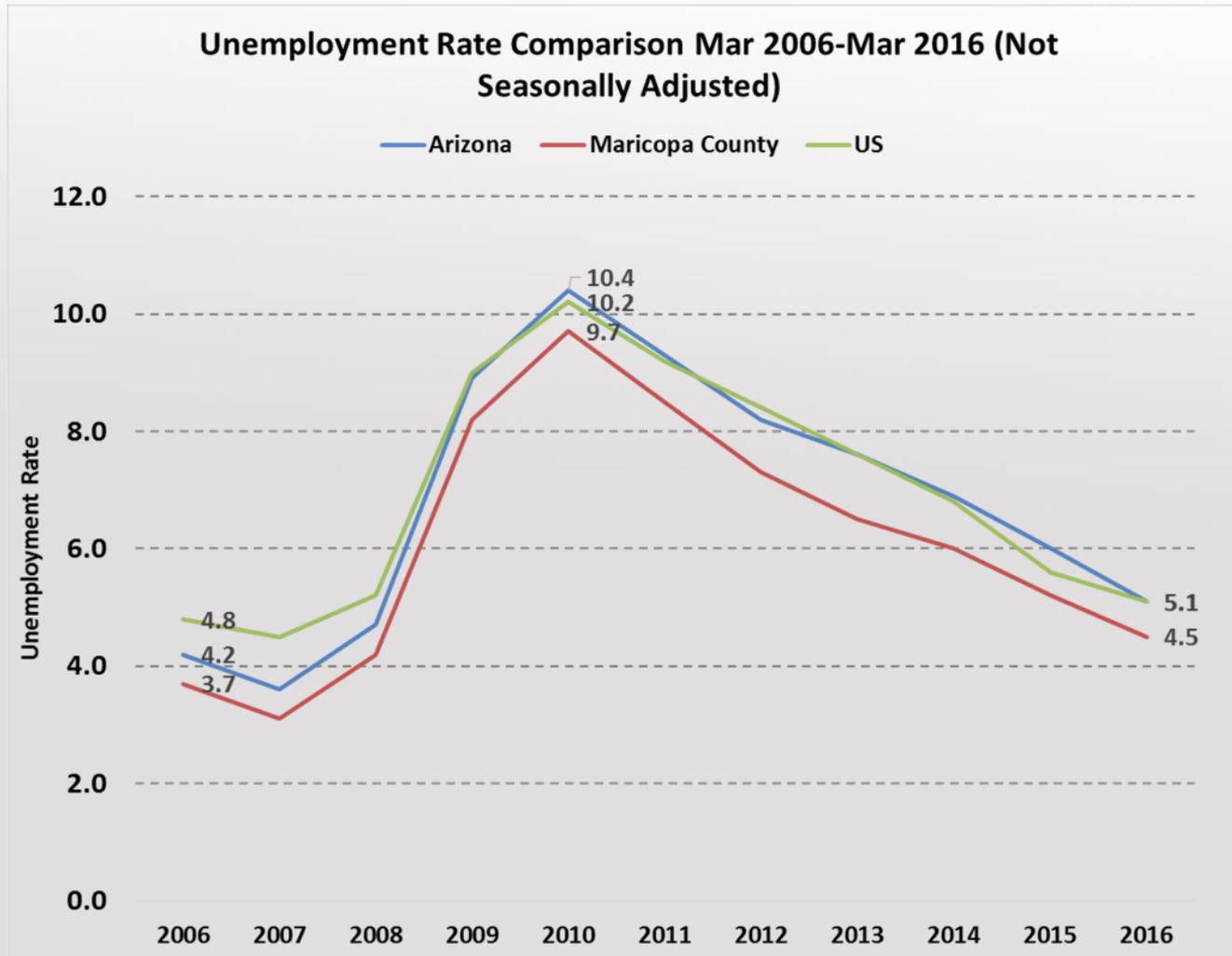
	Maricopa County	Harris County	Arizona	United States
Private Coverage Only (Employer, Direct-Purchase, TRICARE)	50.7%	46.2%	47.0%	52.7%
Public Coverage Only (Medicare, AHCCCS, Veteran's Admin.)	19.3%	19.4%	21.1%	17.6%
Both Private and Public Coverage (Some combination of the above, ex. Tricare for Life and Medicare)	13.5%	9.2%	15.6%	15.5%
Uninsured	16.5%	25.2%	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

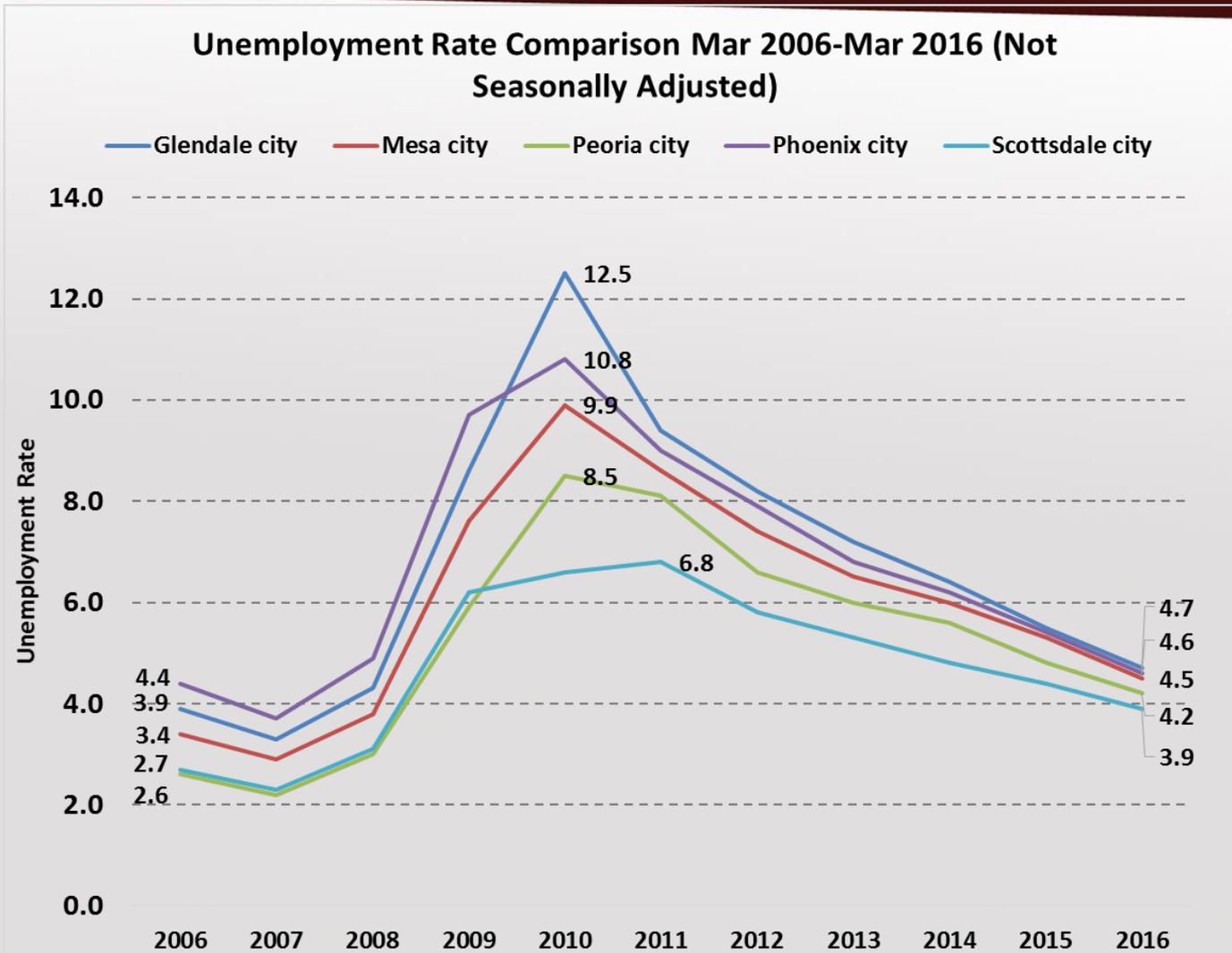
# Maricopa County Detailed Health Insurance (2014)

	Maricopa County	Harris County	Arizona	United States
Employment-based (private)	51.5%	47.4%	48.7%	54.7%
Direct-purchase (private)	12.3%	7.7%	12.5%	12.4%
TRICARE (private)	2.4%	0.9%	3.2%	2.7%
Medicare (public)	14.2%	9.6%	16.5%	15.5%
AHCCCS/Medicaid (public)	18.0%	19.0%	20.0%	17.8%
VA (public)	2.0%	1.2%	2.7%	2.1%
Uninsured	16.5%	25.2%	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

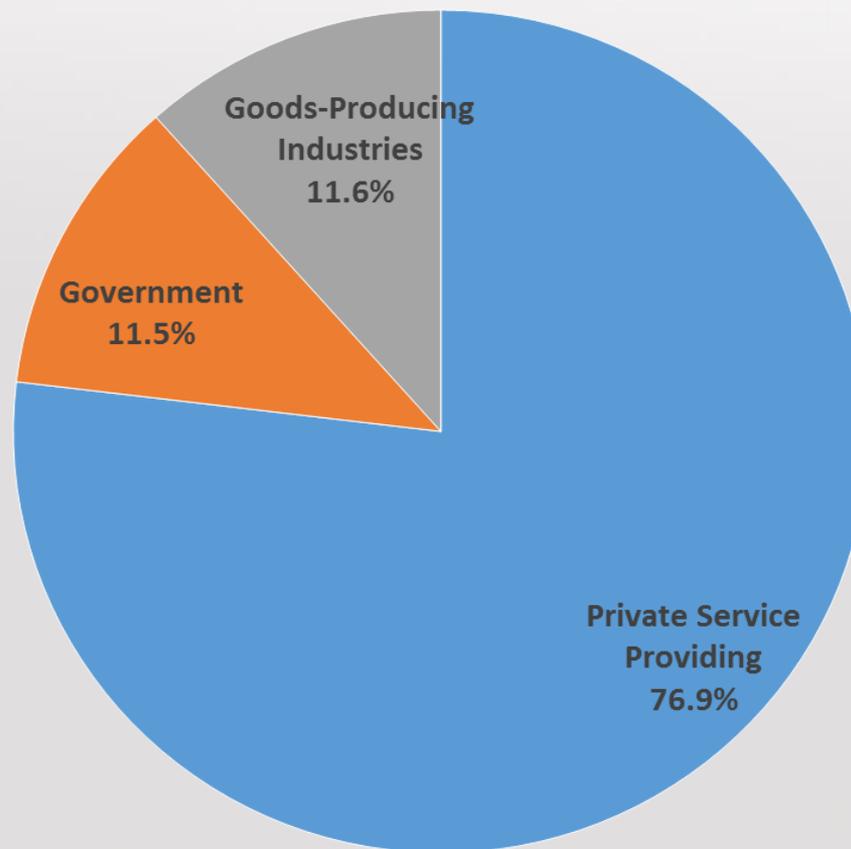
## Over-the-year change in total nonfarm employment for large metropolitan areas, not seasonally adjusted (with a Census 2010 population of 1 million or more)

	Metropolitan area	State	May 2015	May 2016	Over-the-year net change (thousands)	Over-the-year percent change (%)
1	Orlando-Kissimmee-Sanford, FL	Florida	1,155.80	1,204.00	48.2	4.2
2	Austin-Round Rock, TX	Texas	956.70	994.00	37.3	3.9
3	Dallas-Fort Worth-Arlington, TX	Texas	3,389.80	3,515.10	125.3	3.7
4	Tampa-St. Petersburg-Clearwater, FL	Florida	1,248.80	1,294.90	46.1	3.7
5	San Jose-Sunnyvale-Santa Clara, CA	California	1,038.80	1,077.70	38.9	3.7
6	Richmond, VA	Virginia	648.60	672.70	24.1	3.7
7	Seattle-Tacoma-Bellevue, WA	Washington	1,886.40	1,953.70	67.3	3.6
8	Jacksonville, FL	Florida	647.70	670.90	23.2	3.6
9	Riverside-San Bernardino-Ontario, CA	California	1,340.90	1,384.50	43.6	3.3
10	Raleigh, NC	North Carolina	580.10	599.20	19.1	3.3
11	Phoenix-Mesa-Scottsdale, AZ	Arizona	1,902.10	1,960.80	58.7	3.1
48	Houston-The Woodlands-Sugar Land, TX	Texas	2990	2995.1	5.1	0.2

Source: Produced by the U.S. Dept. of Labor, Bureau of Labor Statistics

## Maricopa County Broad Industry Total Nonfarm Employment Share

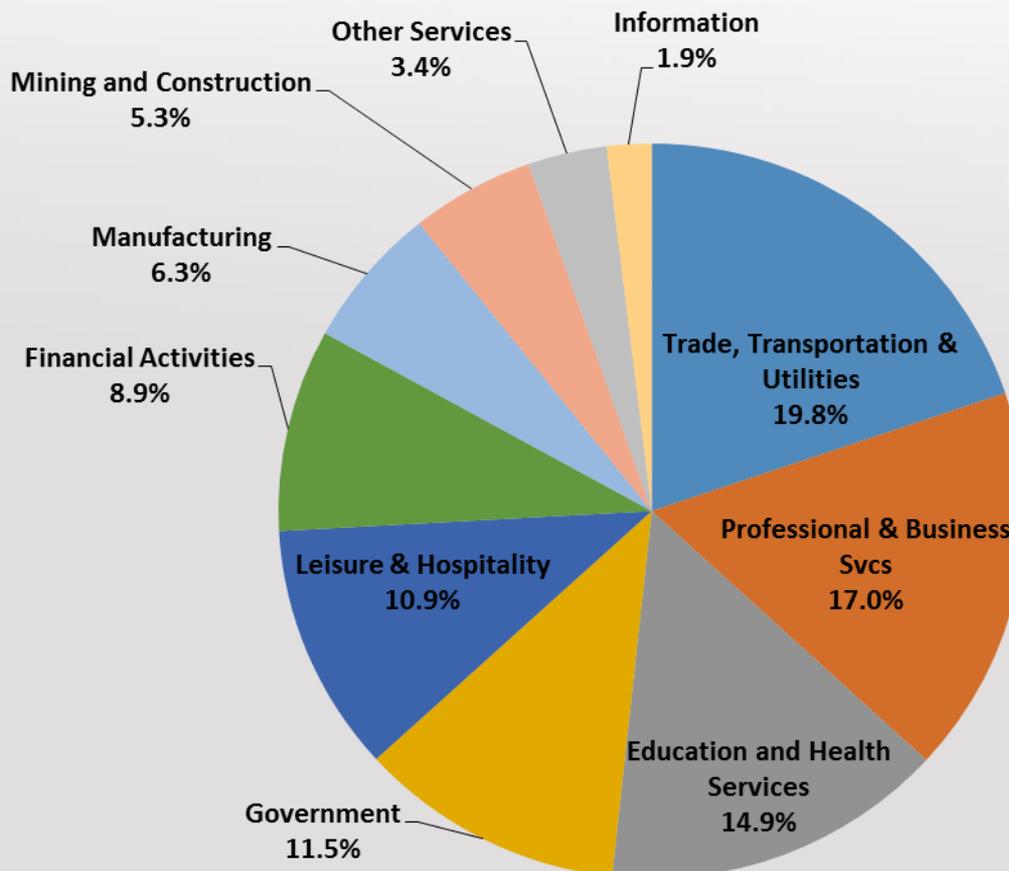
2015 Annual Average, Not Seasonally Adjusted



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

## Maricopa County Industry Nonfarm Employment Share

2015 Annual Average, Not Seasonally Adjusted



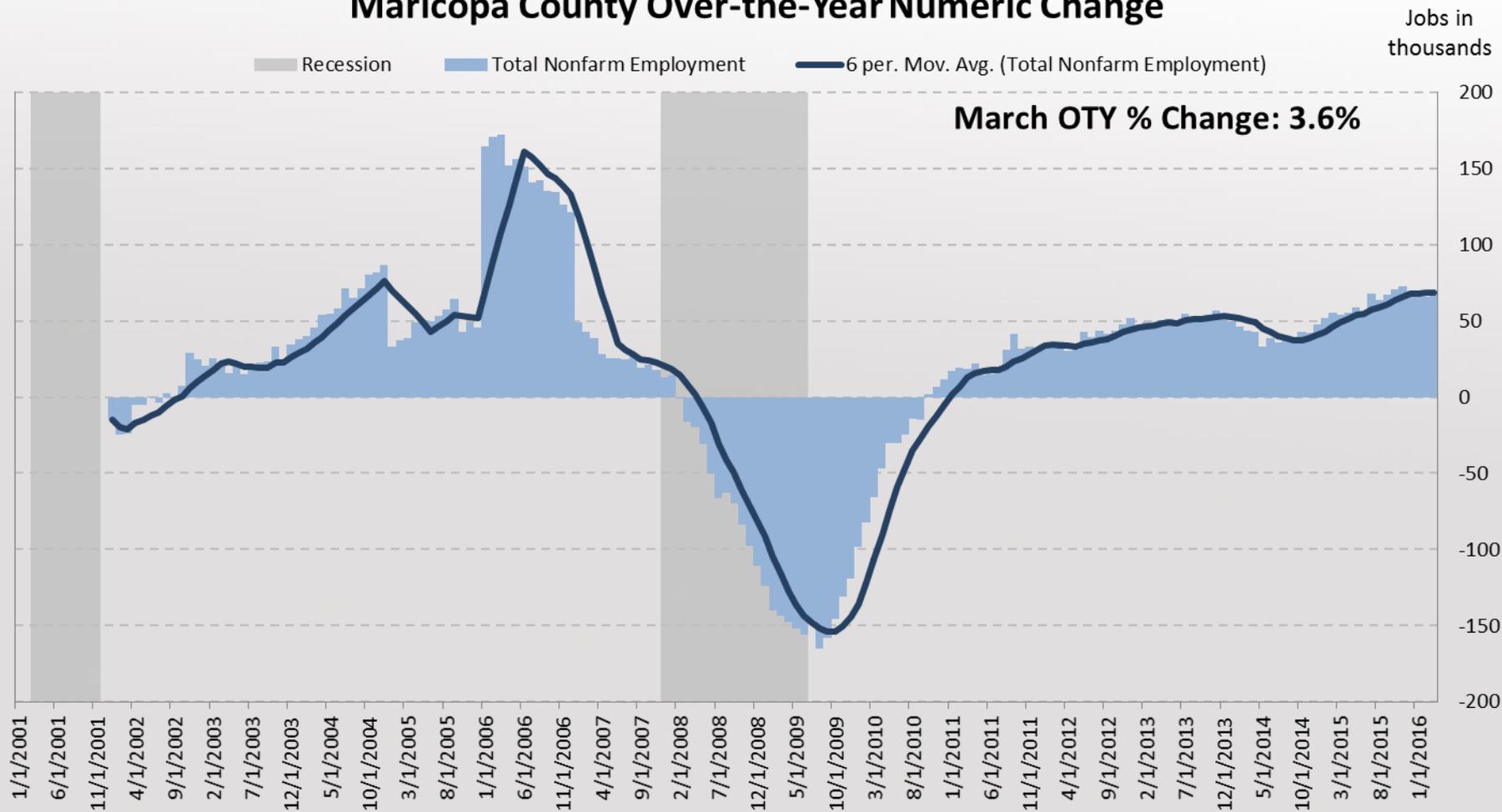
Source: Produced by the Arizona Office of Employment and Population Statistics in cooperation with the U.S. Dept. of Labor, Bureau of Labor Statistics

## Maricopa County Industry Nonfarm Employment Share 2001 & 2015 Annual Averages

Industry	Employment Share		
	2001	2015	Change
Trade, Transportation & Utilities	20.4%	19.8%	-0.6%
Professional & Business Svcs	16.4%	17.0%	0.6%
Education and Health Services	9.1%	14.9%	5.8%
Government	12.1%	11.5%	-0.6%
Leisure & Hospitality	9.6%	10.9%	1.3%
Financial Activities	8.3%	8.9%	0.6%
Manufacturing	9.6%	6.3%	-3.4%
Mining and Construction	8.2%	5.3%	-2.8%
Other Services	3.7%	3.4%	-0.3%
Information	2.6%	1.9%	-0.7%
Total Nonfarm	100.0%	100.0%	na

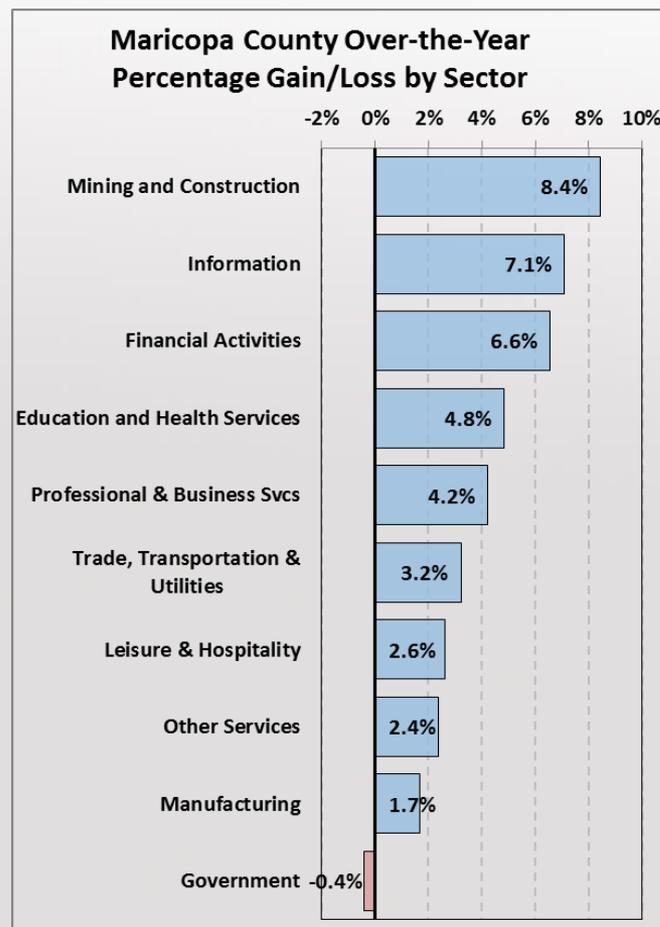
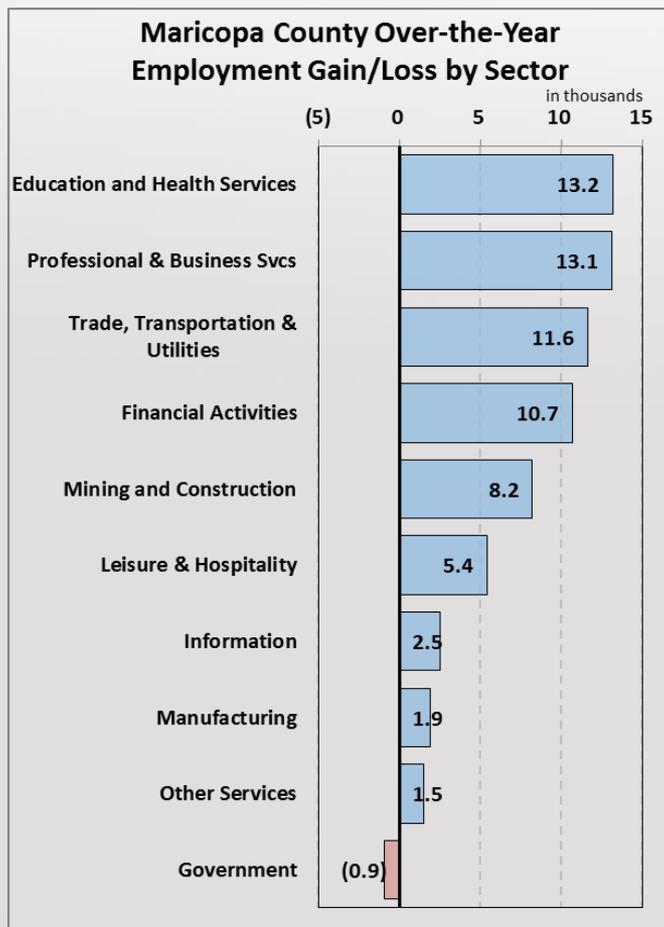
Source: Produced by the Arizona Office of Employment and Population Statistics using LAUS data in cooperation with the U.S. Dept. of Labor, Bureau of Labor Statistics

## Maricopa 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  
 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

## March 2016 Nonfarm Employment Report



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

## Phoenix-Mesa-Glendale 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	12,708	12,206	-502	-2.0%
101200	Construction	98,371	114,381	16,010	7.8%
101300	Manufacturing	118,377	119,631	1,254	0.5%
102100	Trade, Transportation, and Utilities	381,063	400,538	19,475	2.5%
102200	Information	36,959	39,614	2,655	3.5%
102300	Financial Activities	160,226	172,930	12,704	3.9%
102400	Professional and Business Services	311,711	340,905	29,194	4.6%
102500	Education and Health Services	381,456	403,800	22,344	2.9%
102600	Leisure and Hospitality	219,081	235,150	16,069	3.6%
102700	Other Services (Except Government)	51,249	52,737	1,488	1.4%
102800	Government	79,807	79,863	56	0.0%
102900	Unclassified	101,022	105,277	4,255	2.1%

Entire dataset available at: <https://laborstats.az.gov/employment-forecasts>

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 Employment Change

	2015 Q2(a)	2017Q2(b)	Employment Change
Arizona	2,718,515	2,875,050	156,535
Phoenix MSA <sup>1</sup>	1,952,031	2,077,030	124,999
Tucson MSA <sup>2</sup>	370,866	385,259	14,393
Balance of State <sup>3</sup>	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 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 <sup>1</sup>	2.90%	3.15%
Tucson MSA <sup>2</sup>	0.56%	1.92%
Balance of State <sup>3</sup>	1.84%	2.12%

1) Maricopa and Pinal Counties

2) Pima County

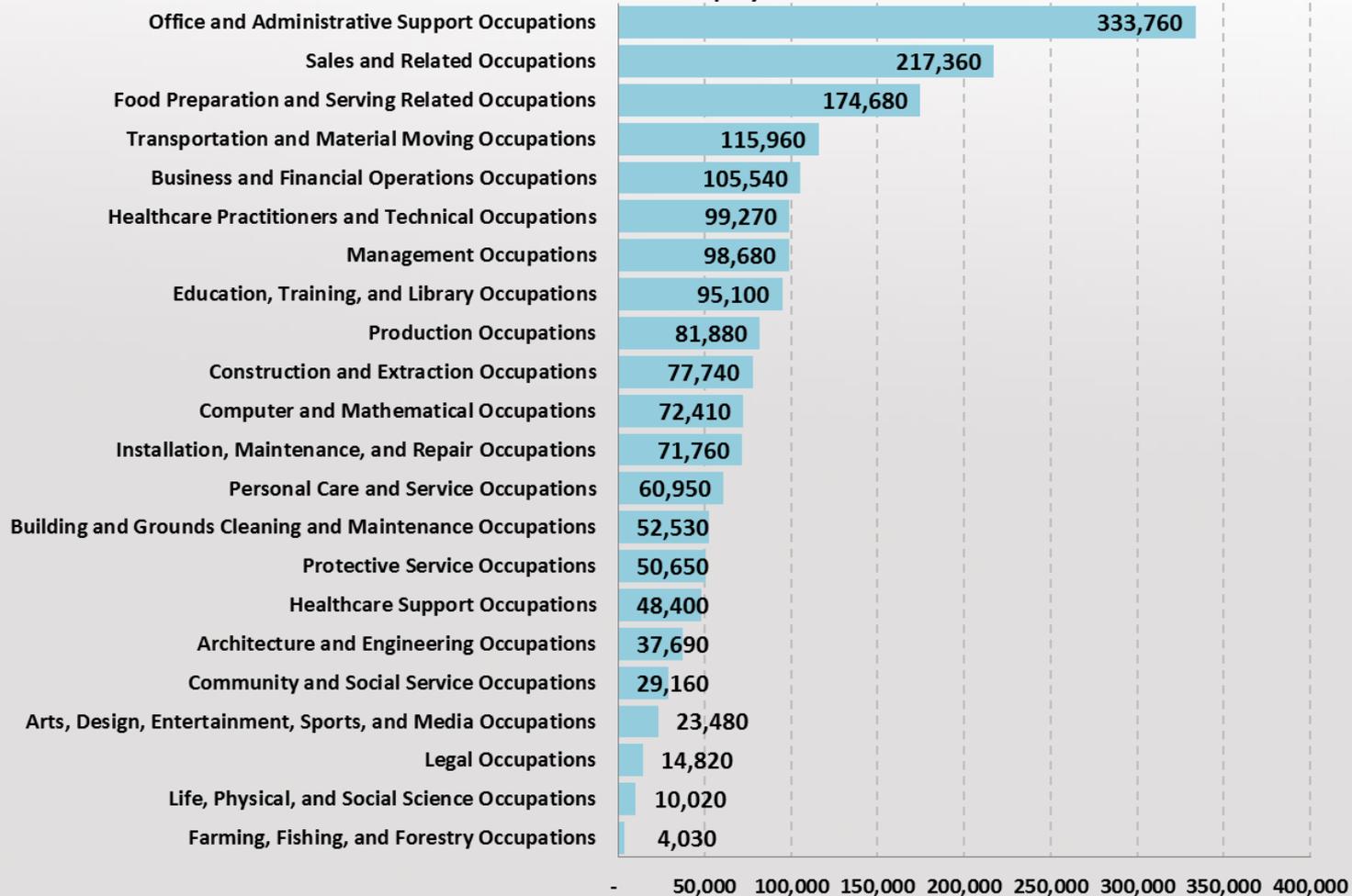
3) Arizona less Maricopa, Pinal and Pima counties

a) Historical

b) Forecast

## Phoenix-Mesa-Scottsdale Metro Major Occupational Groups

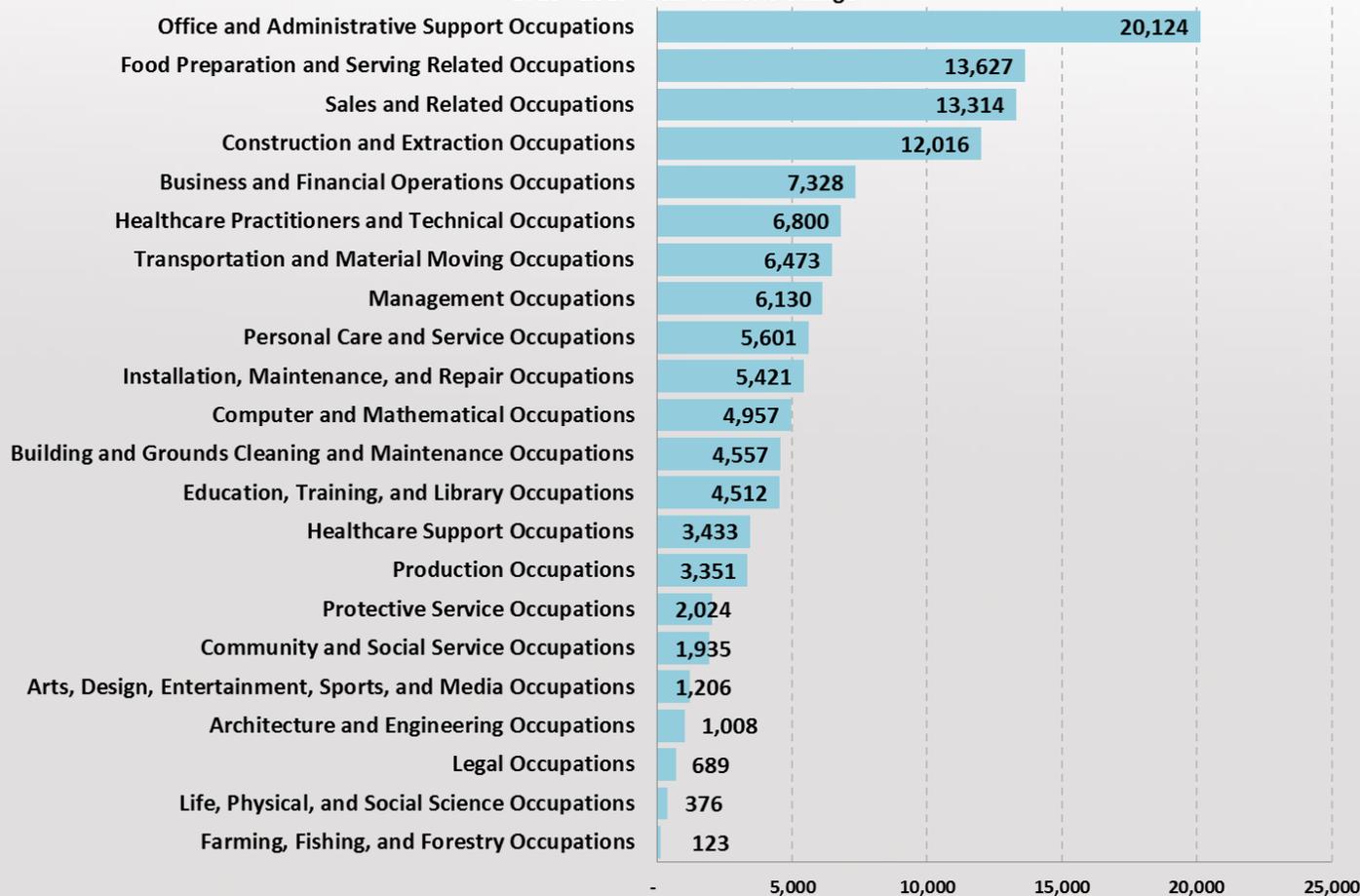
2015 Total Employment



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

## Phoenix Metro Major Occupational Groups

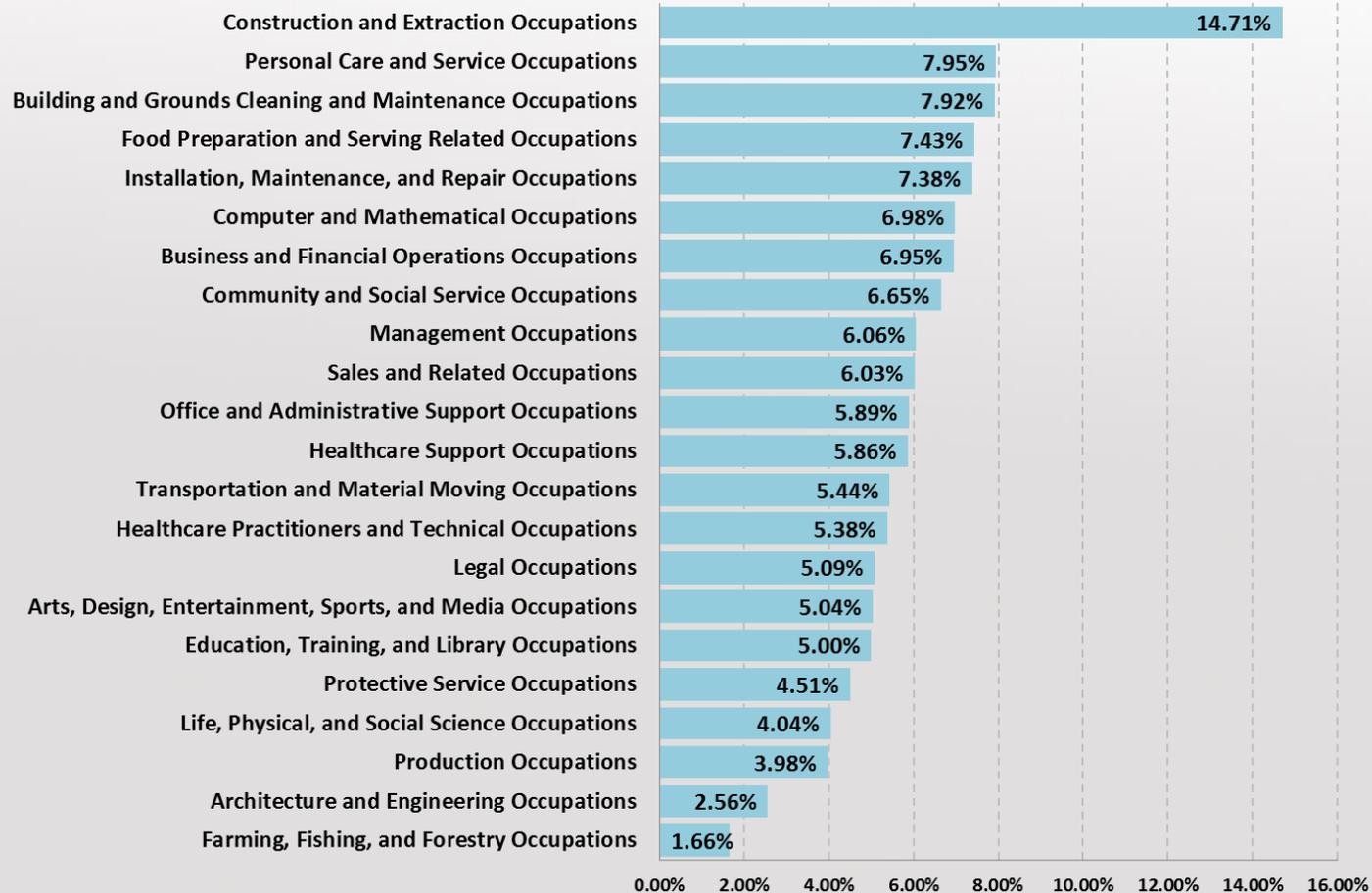
2015 - 2017 Total Numeric Change



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

## Phoenix Metro Major Occupational Groups

2015 - 2017 Total Percentage Change

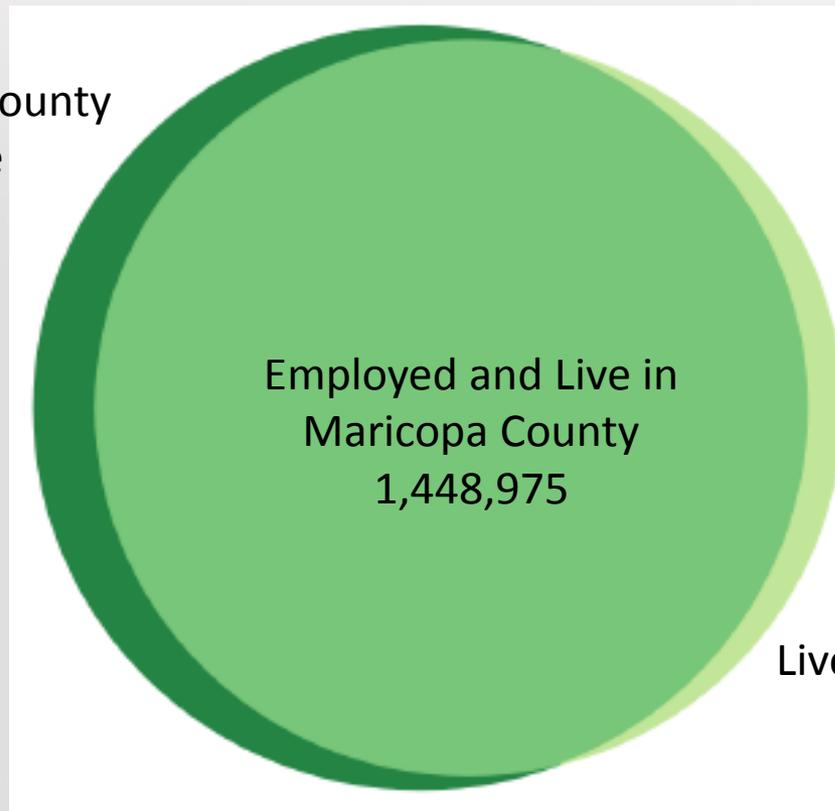


Entire dataset available at: <https://laborstats.az.gov/employment-forecasts>

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

# Maricopa County Commuting Patterns

## Maricopa County 2014



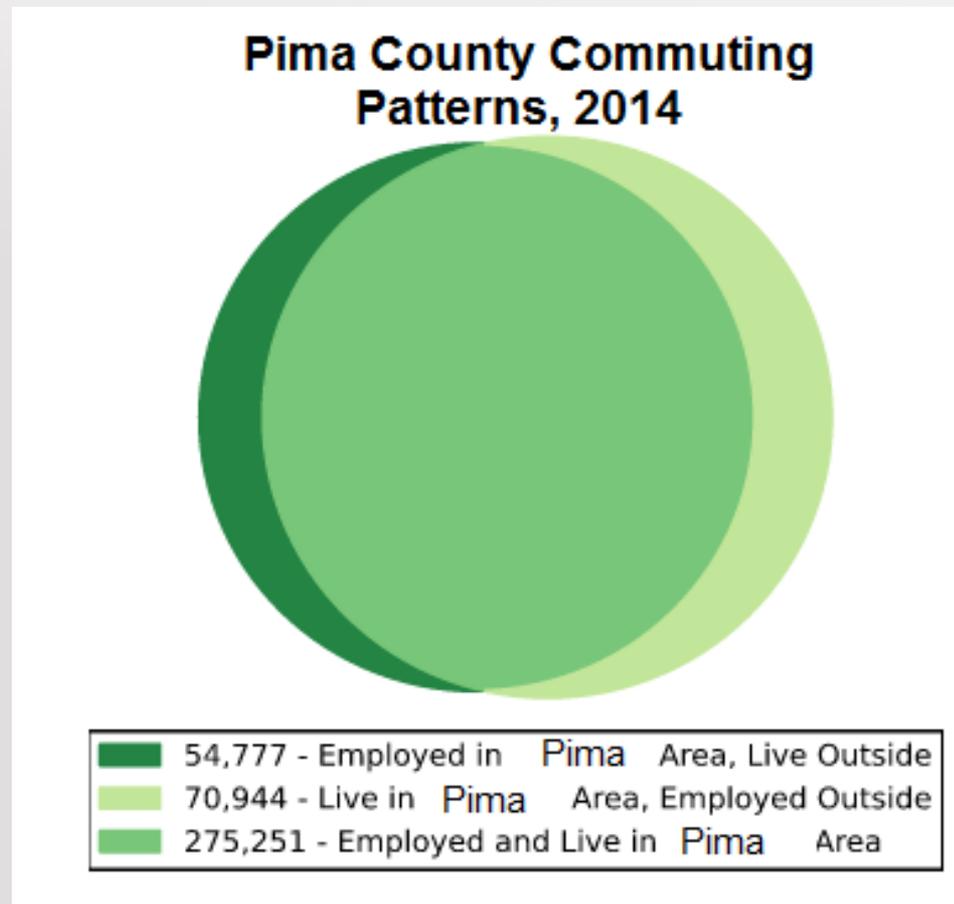
Employed in Maricopa County  
and Live Elsewhere  
217,445

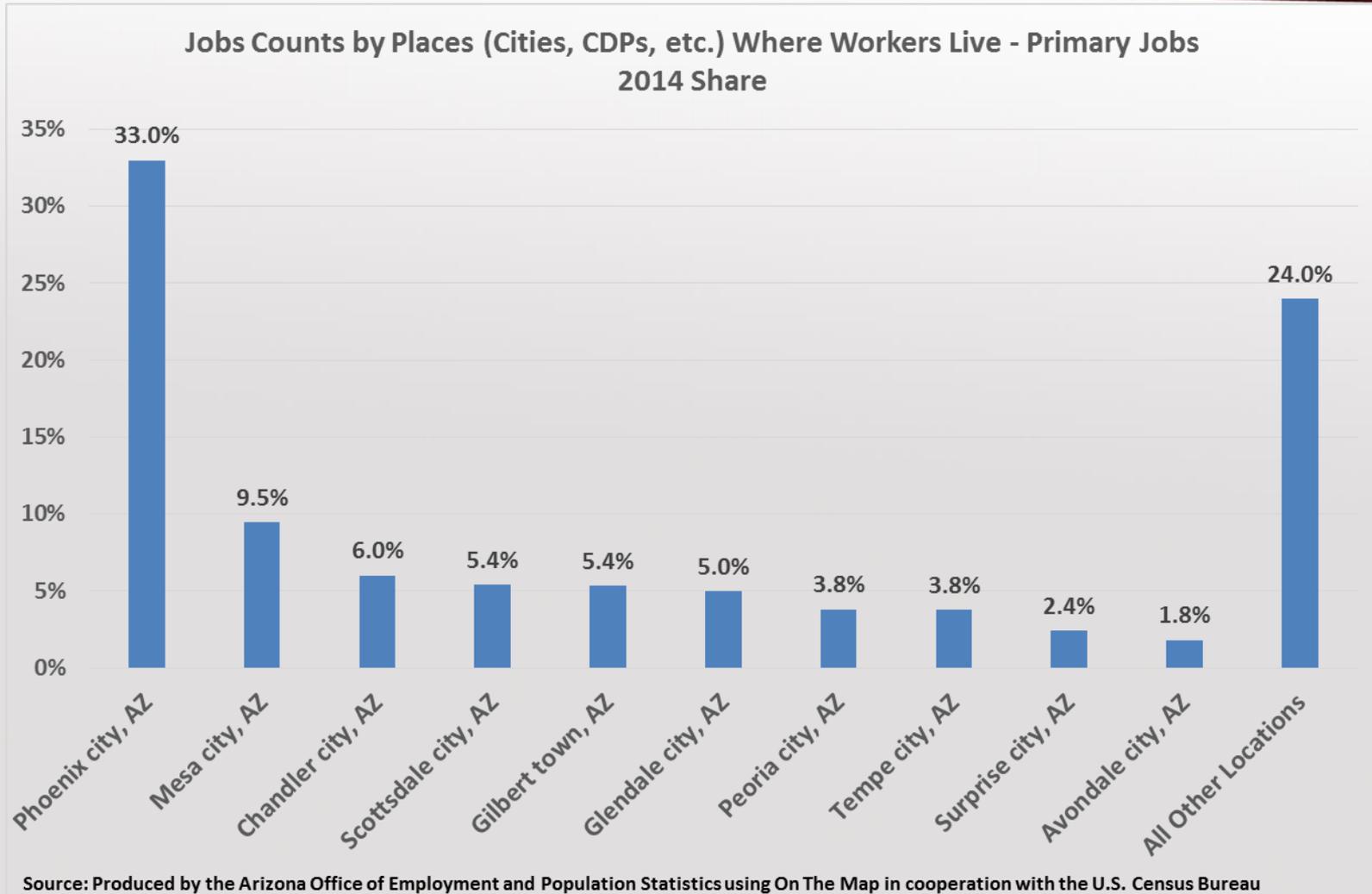
Employed and Live in  
Maricopa County  
1,448,975

Live in Maricopa County and  
Work Elsewhere  
96,724

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 Pima County Commuting Patterns





# 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:
  - Above-average 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, above-average wages and high employment and wage location quotients
- **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, Maricopa County, Pima County, Etc.
  - Base Area: United States
- Allows comparison of relative employment and wage levels in the United States, states, counties, & MSAs

## 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

### Maricopa 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
- The economic variables were then averaged together to calculate an overall industry ranking

## Maricopa 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	7	6	5	4	3
2	NAICS 622 Hospitals	4	8	5	6	9	5
3	NAICS 524 Insurance carriers and related	6	6	1	9	3	8
4	NAICS 522 Credit intermediation and related	3	5	7	7	2	6

## Maricopa County

### Existing Demand Occupation Detail

Variables	Weight	Constraints	Detail	Period
Average hourly wage	1	6-digit SOC	2014	na
Projected employment change (percentage)	1	6-digit SOC	2012-2022	na
Percentage share of industry employment	1	6-digit SOC	2014	na

Existing and Emerging Demand Occupations were selected based on three employment characteristics

- Average hourly wages
- Projected employment change
- Industry employment share

Economic estimates are listed for reference for each existing and emerging demand industry identified

## Maricopa County

### Existing Demand Industry Detail

#### NAICS 621 Ambulatory health care services

<b>Average Employment Level</b> <i>(3-Digit Industry; 2014-2015)</i>	<b>104,508</b>
<b>Average Weekly Wage Level</b> <i>(3-Digit Industry; 2014-2015)</i>	<b>\$1,174</b>
<b>Employment Growth</b> <i>(3-Digit Industry; 2014-2015)</i>	<b>1.8%</b>
<b>Average Wage Growth</b> <i>(3-Digit Industry; 2014-2015)</i>	<b>1.9%</b>
<b>Employment Location Quotient</b> <i>(3-Digit Industry; 2014-2015)</i>	<b>1.2</b>
<b>Wage Location Quotient</b> <i>(3-Digit Industry; 2014-2015)</i>	<b>1.1</b>
<b>Employment Growth</b> <i>(2-Digit Super Sector; 2011-2015)</i>	<b>3.6%</b>
<b>Employment Share Change</b> <i>(2-Digit Super Sector; 2011-2015)</i>	<b>1.1%</b>
<b>Projected Employment Growth</b> <i>(2-Digit Super Sector; 2012-2022)</i>	<b>3.6%</b>

# Existing Demand Occupations

## Maricopa County

### Existing Demand Industry Detail

NAICS 621 Ambulatory health care services

Rank	Occupation Title	Industry Employment Share
1	Physician assistants	0.8%
2	Dental hygienists	2.2%
3	Physical Therapists	2.2%
4	Nurse practitioners	0.7%
5	Medical and Health Services Managers	1.7%

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

## Maricopa County

### Existing Demand Occupation Detail

#### Physician assistants

<b>SOC Code</b>	29-1071
<b>Education Requirement</b>	Master's degree
<b>Work Experience Requirement</b>	None
<b>On-the-Job Training Requirement</b>	None
<b>Knowledge Requirement</b>	Medicine and Dentistry
<b>Skill Requirement</b>	Reading Comprehension
<b>Ability Requirement</b>	Oral Comprehension
<b>Employment Level</b>	1590
<i>(6-Digit SOC Code; 2014)</i>	
<b>Average Hourly Wage</b>	\$47.7
<i>(6-Digit SOC Code; 2014)</i>	
<b>Projected Employment Growth</b>	6.3%
<i>(2-Digit Super Sector; 2012-2022)</i>	
<b>Industry Employment Share</b>	0.78
<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](https://laborstats.az.gov/employment)

Unemployment Data:

[laborstats.az.gov/unemployment](https://laborstats.az.gov/unemployment)

Wage & Income Data:

[laborstats.az.gov/wages-income](https://laborstats.az.gov/wages-income)

Employment Projections Data:

[laborstats.az.gov/employment-forecasts](https://laborstats.az.gov/employment-forecasts)

Population Data:

[laborstats.az.gov/population](https://laborstats.az.gov/population)

## Other Labor Market Sources

### Commuting Patterns Data:

On the Map: [onthemap.ces.census.gov/](http://onthemap.ces.census.gov/)

### Demographics Data:

American Community Survey: [census.gov/programs-surveys/acs/](http://census.gov/programs-surveys/acs/)

### Personal Income & State GDP Data:

US Bureau of Economic Analysis: [bea.gov/regional/index.htm](http://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](http://onetonline.org/find/descriptor/browse)

# Any Questions?

## Contact Information

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