

# Economic Overview of Maricopa County



OFFICE *of* ECONOMIC OPPORTUNITY

Doug Walls  
Research Administrator

# Agenda:

- ▶ Introductions
- ▶ Why Labor Market Information Matters
- ▶ County Trends
- ▶ Case Study
- ▶ Sector Highlights

# Introductions:

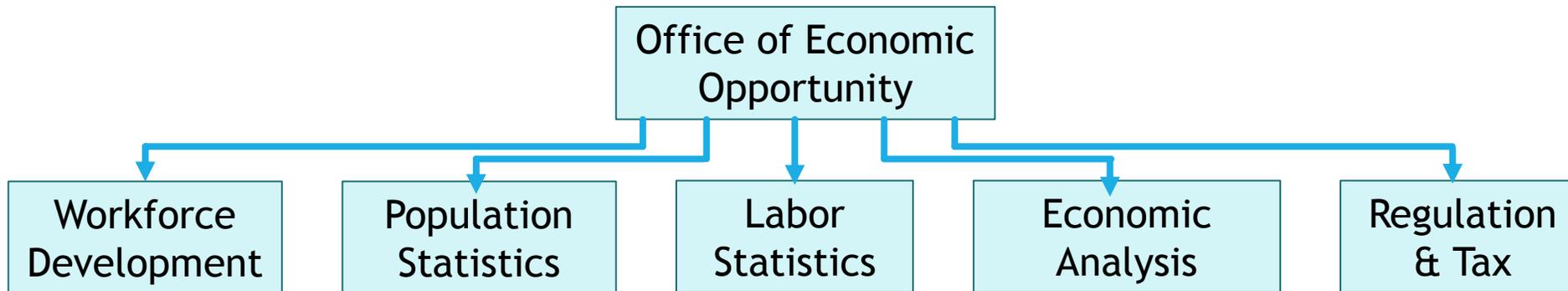
## Office of Economic Opportunity

- ▶ Designed to bridge the gap between workforce development initiatives and economic development priorities
- ▶ Strives to help share Labor Market Information with groups that can apply it to policy decision making
- ▶ Primarily focus in employment and population data

# Introductions:

## Office of Economic Opportunity

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# Presentation Goals

By the end of this presentation I hope to...

- ▶ Strengthen your understanding of the Maricopa County Economic Environment
- ▶ Confirm a few of your assumptions about Maricopa County
- ▶ Explore the economic impacts of social challenges
- ▶ Highlight industries and occupations that are important to Maricopa County



# Why does this matter to you?

How does this fit into your role?

## HSD Vision:

- ▶ All Maricopa County residents will have equal access to opportunities to improve their lives

## My Personal Vision:

- ▶ Economic Opportunity should be available for all

# Why does this matter to you?

How does this fit into your role?

## HSD Vision:

- ▶ All Maricopa County residents will have equal access to opportunities to improve their lives

## My Personal Vision:

- ▶ Economic Opportunity should be available for all

## Labor Market Data may be able to help!

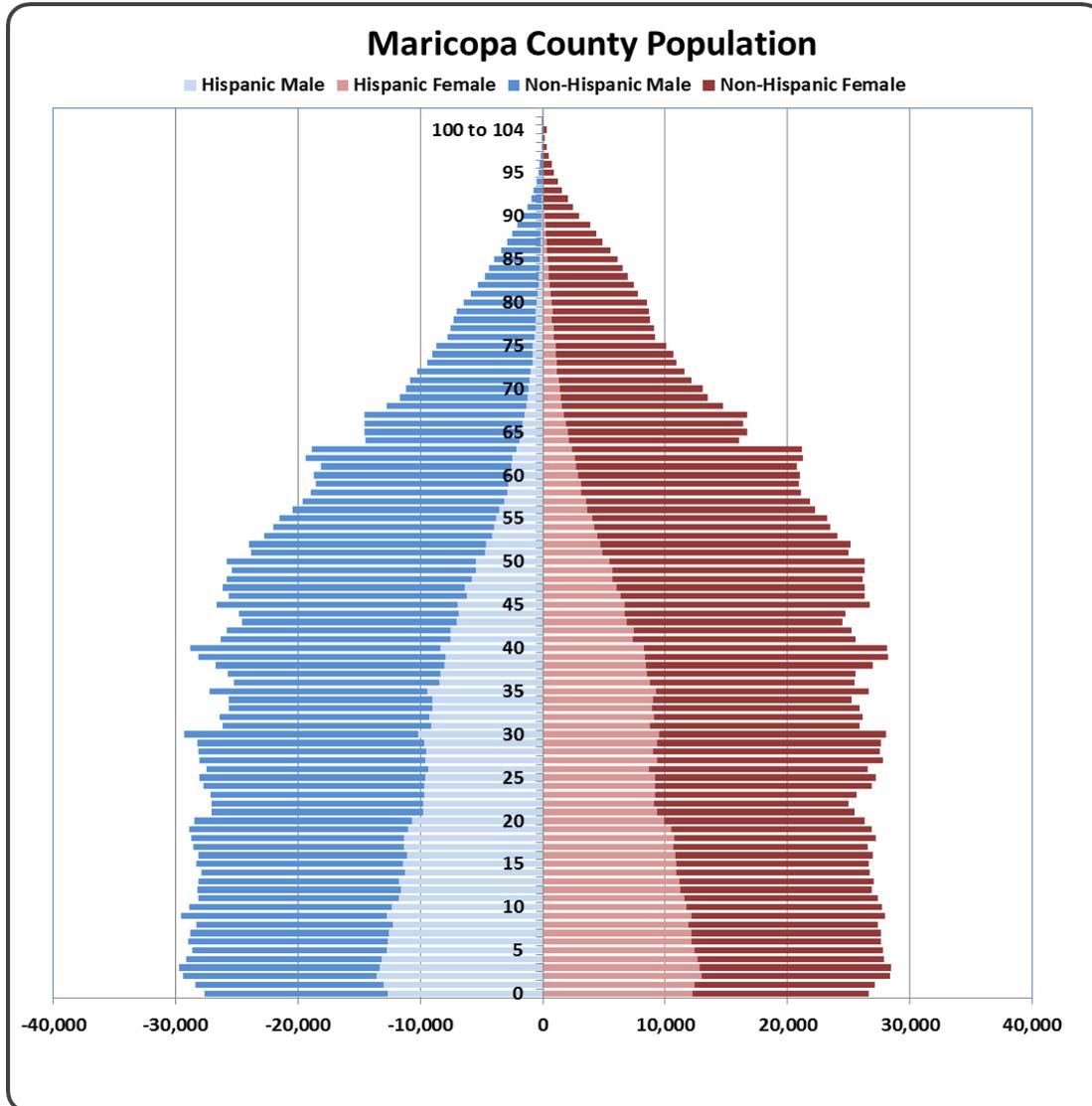
- ▶ Help identify geographic areas of high needs
- ▶ Highlight occupations with the most potential for future success
- ▶ Inform you about the community you are working to improve

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# Maricopa County Trends

## How are we doing?

# Population Pyramid



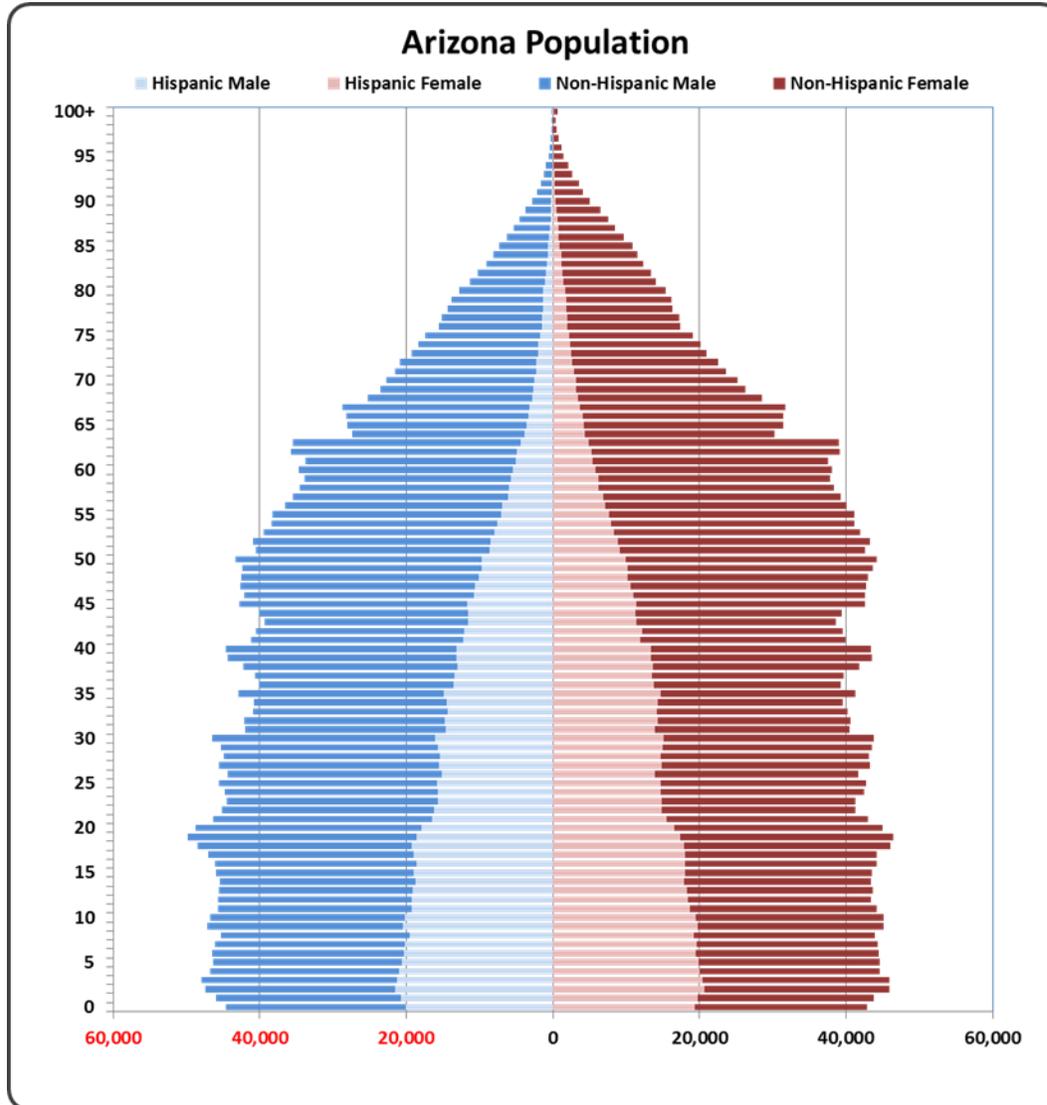
## Maricopa County

Census 2010

Total Population: 3,817,117

<b>Hispanic</b>	1,128,741	
<b>Male</b>	568,138	14.9%
<b>Female</b>	560,603	14.7%
<b>Non-Hispanic</b>	2,688,376	
<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%

# Population Pyramid



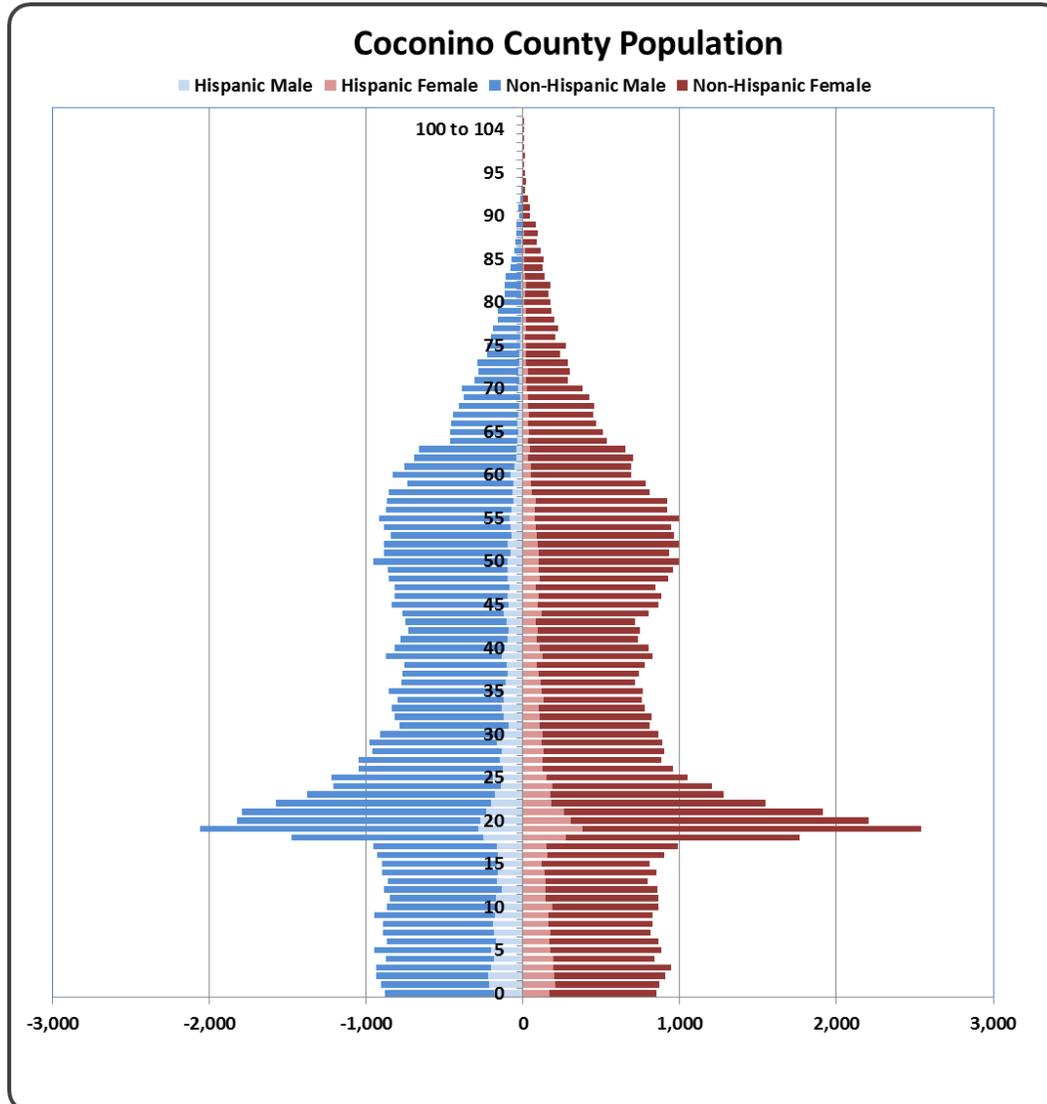
## Arizona

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%

# Population Pyramid



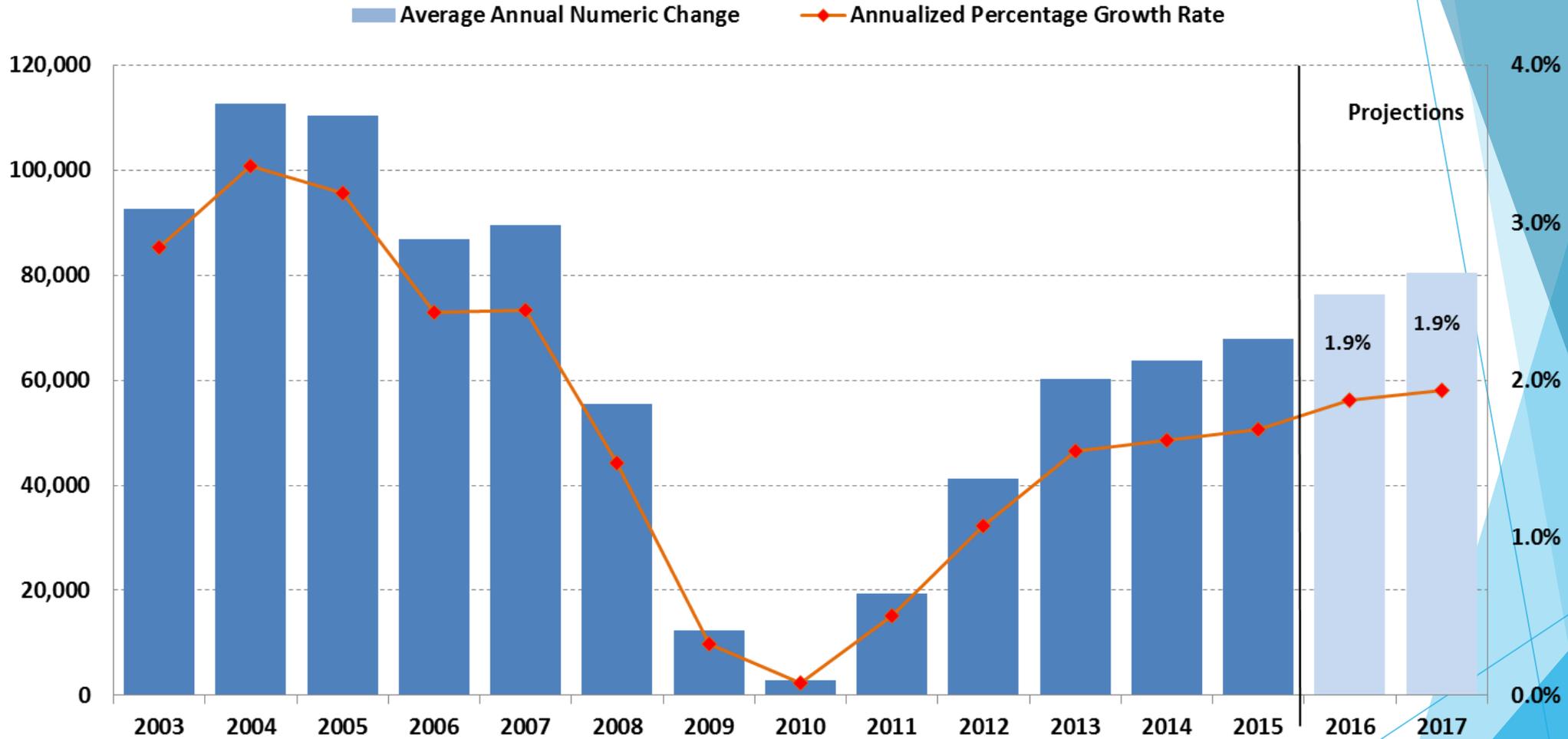
## Coconino County

Census 2010

**Total Population:** 134,421

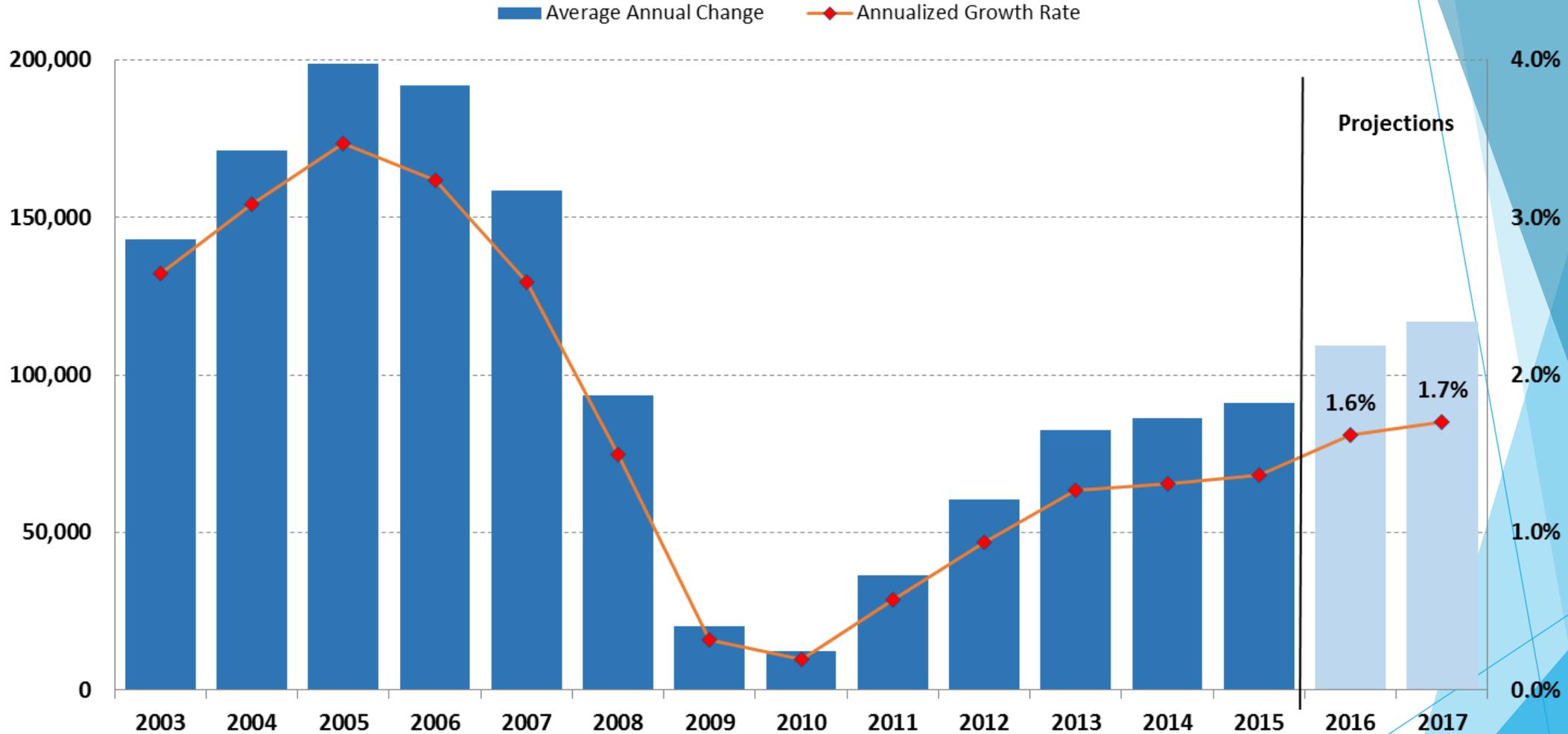
<b>Hispanic</b>			
Male	9,157	6.8%	
Female	9,009	6.7%	
<b>Non-Hispanic</b>			
Male	57,509	42.8%	
Female	58,746	43.7%	
<b>Under 17</b>	29,848	22.2%	
<b>Age 17 - 24</b>	25,708	19.1%	
<b>Age 25 - 34</b>	18,129	13.5%	
<b>Age 35 - 44</b>	15,499	11.5%	
<b>Age 45 - 54</b>	17,953	13.4%	
<b>Age 55 - 64</b>	15,360	11.4%	
<b>Over 64</b>	11,924	8.9%	

# 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 Economic Opportunity using 2010 Census data in cooperation with the U.S. Census Bureau

# Maricopa County Quick Facts (2014)

	Maricopa County	Arizona	United States
Median Household Income	\$53,689	\$49,928	\$53,482
Median Age	35.3	36.5	37.4
Individuals with a Disability Between 18-64	8.4%	9.9%	10.2%
Veterans	8.8%	10.0%	8.3%
Poverty Status	17.1%	18.2%	15.6%
Mean Travel Time to Work	25:24	24:42	25:42
Civilian Labor Force Participation Rate	63.6%	59.7%	63.5%
Population over 16	3,047,709	5,121,781	248,775,628

Source: Produced by the Arizona Office Economic Opportunity 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)

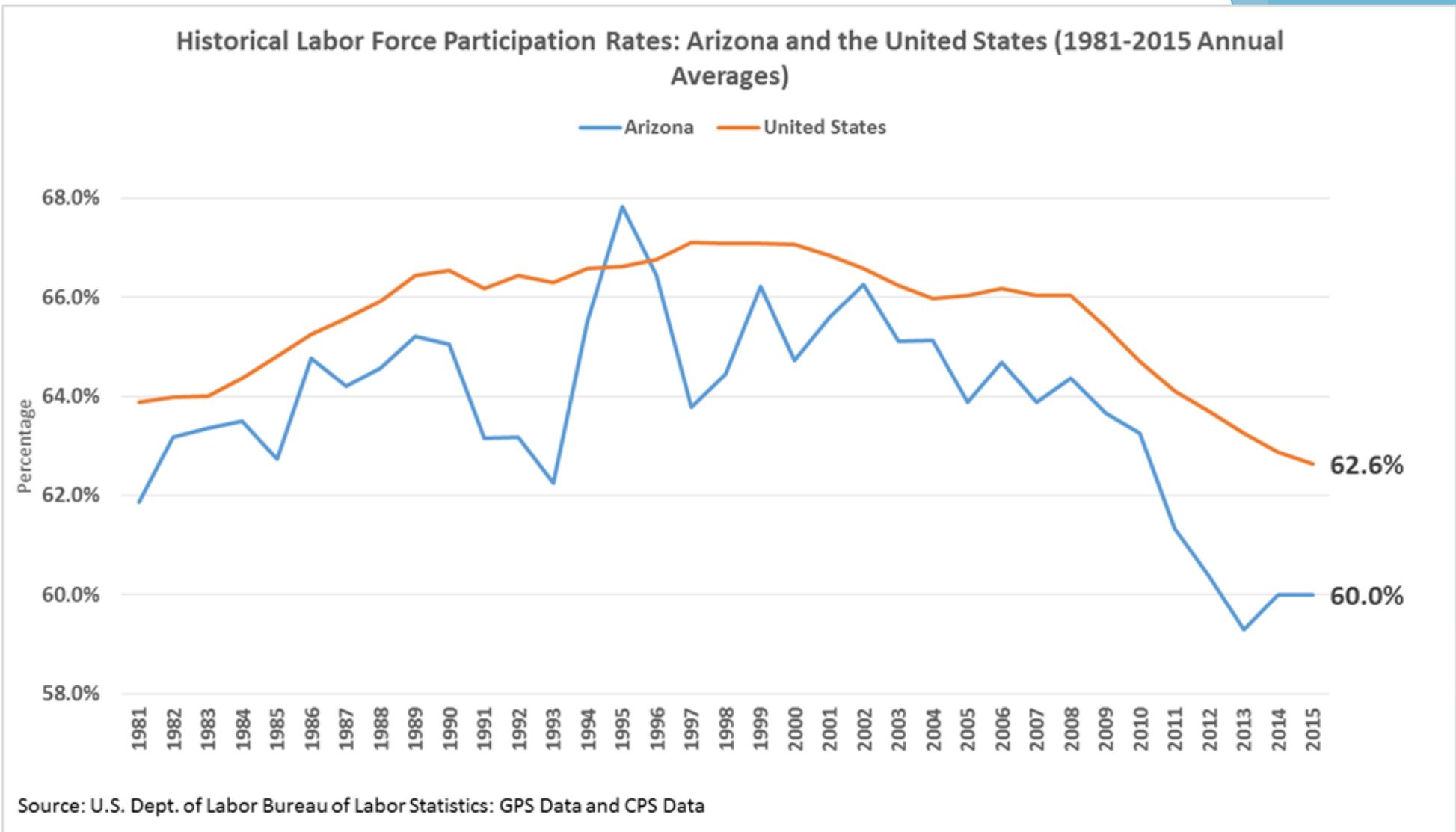
	<b>Maricopa County</b>	<b>Arizona</b>	<b>United States</b>
<b>Less than High School</b>	<b>13.4%</b>	<b>14.1%</b>	<b>13.6%</b>
<b>High School Graduate (includes equivalency)</b>	<b>48.3%</b>	<b>50.4%</b>	<b>49.2%</b>
<b>Associate's Degree</b>	<b>8.4%</b>	<b>8.4%</b>	<b>7.9%</b>
<b>Bachelor's Degree</b>	<b>19.2%</b>	<b>17.1%</b>	<b>18.3%</b>
<b>Graduate or Professional Degree</b>	<b>10.7%</b>	<b>10.0%</b>	<b>11.0%</b>

Source: Produced by the Arizona Office Economic Opportunity using 2014 ACS 5-Year Estimates (S1501) in cooperation with the U.S. Census Bureau

## Maricopa County Public Assistance Households (2014)

	<b>Maricopa County</b>	<b>Arizona</b>	<b>United States</b>
<b>TANF (Temporary Assistance for Needy Families)</b>	<b>2.2%</b>	<b>2.5%</b>	<b>2.8%</b>
<b>SSI (Supplemental Security Income)</b>	<b>3.5%</b>	<b>4.2%</b>	<b>5.3%</b>
<b>SNAP (Supplemental Nutrition Assistance Program)</b>	<b>12.0%</b>	<b>13.6%</b>	<b>13.0%</b>
<b>Medicaid/AHCCCS (Arizona Health Care Cost Containment System) (Individuals)</b>	<b>18.0%</b>	<b>20.0%</b>	<b>17.8%</b>

Source: Produced by the Arizona Office Economic Opportunity using 2014 ACS 5-Year Estimates (DP03, S2701) in cooperation with the U.S. Census Bureau

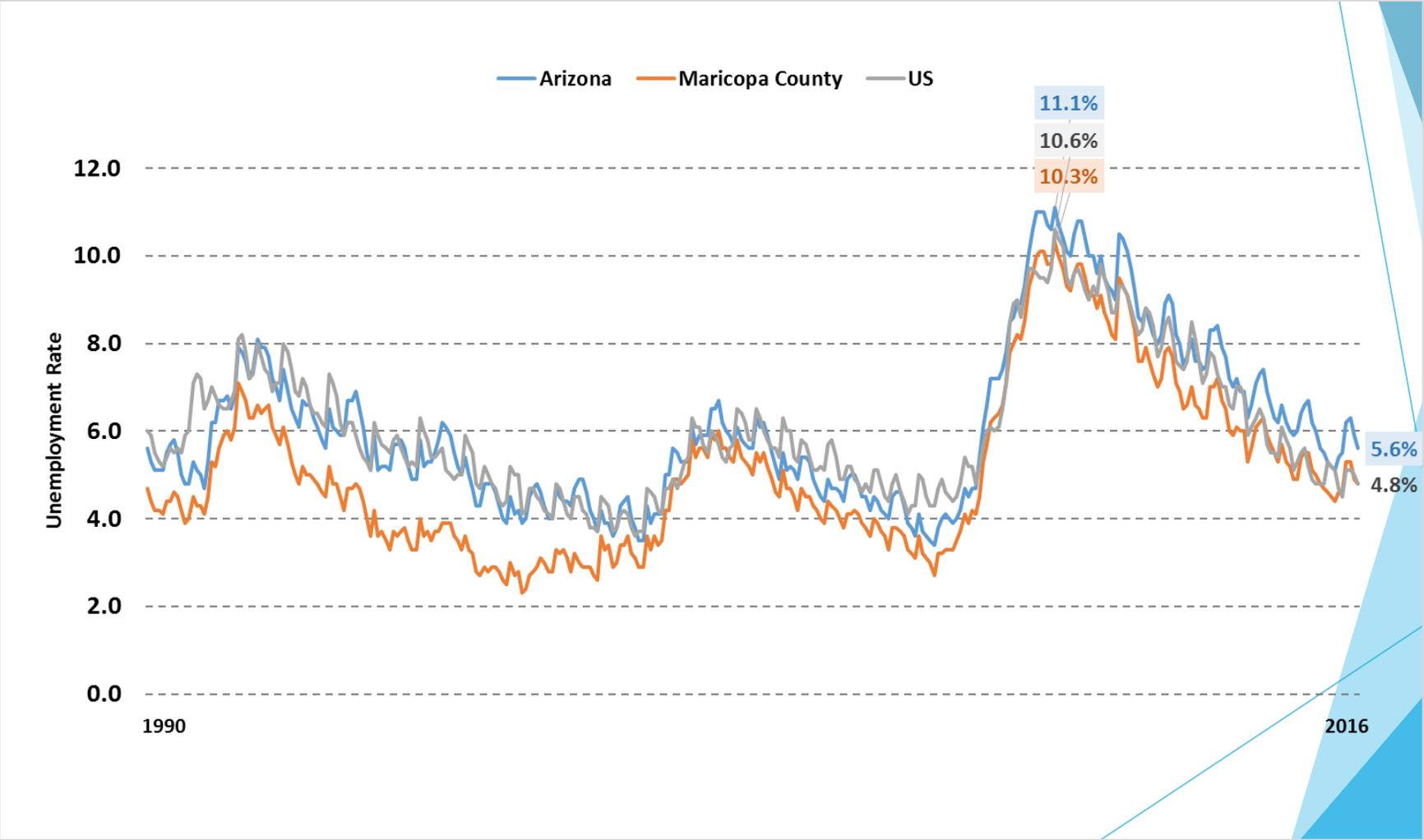


- Arizona's Labor Force Participation Rate has consistently trended below the national Labor Force Participation Rate

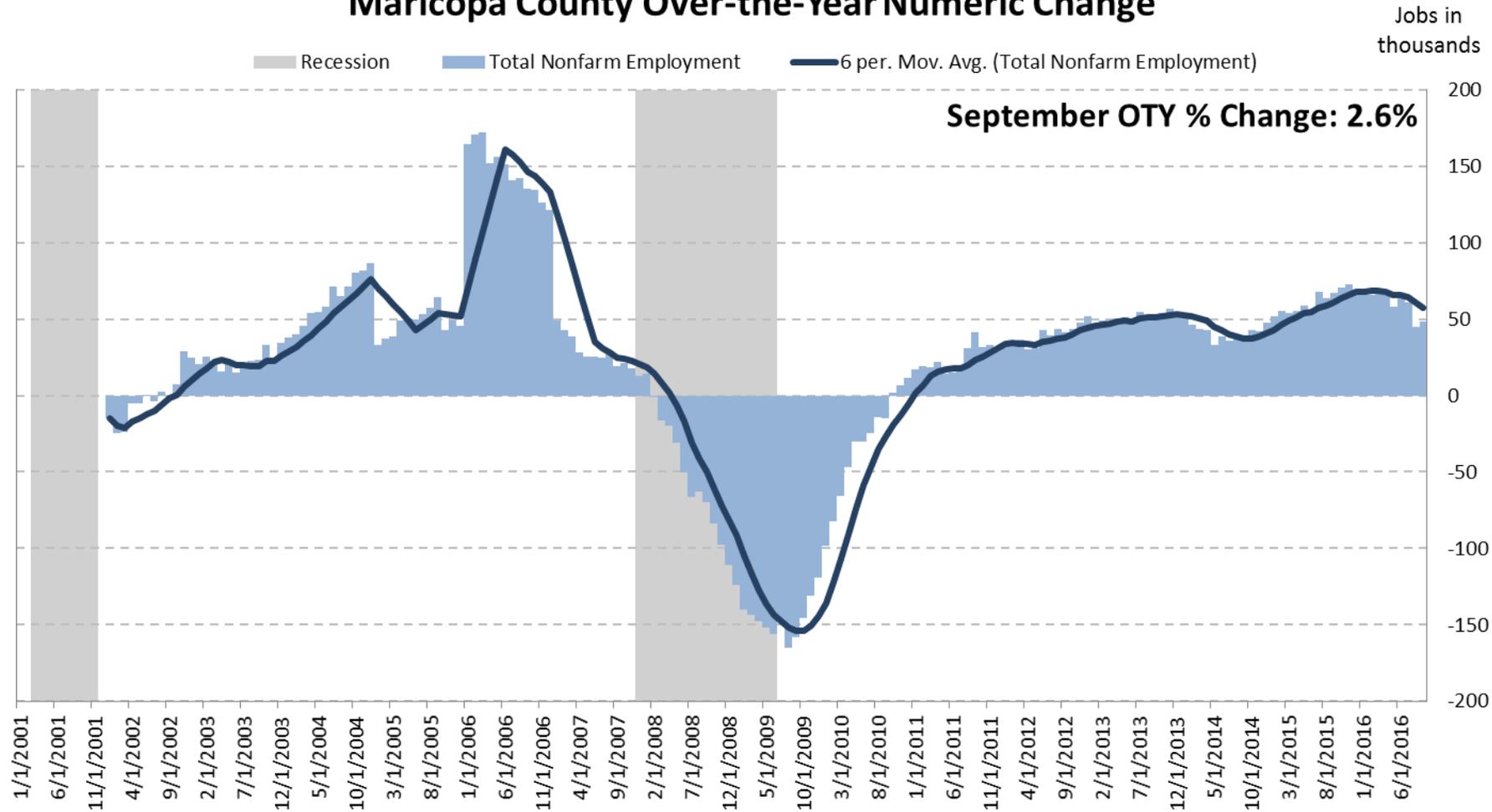
# Unemployment Rate Comparison

(Not Seasonally Adjusted)

Jan. 1990 - Sept. 2016



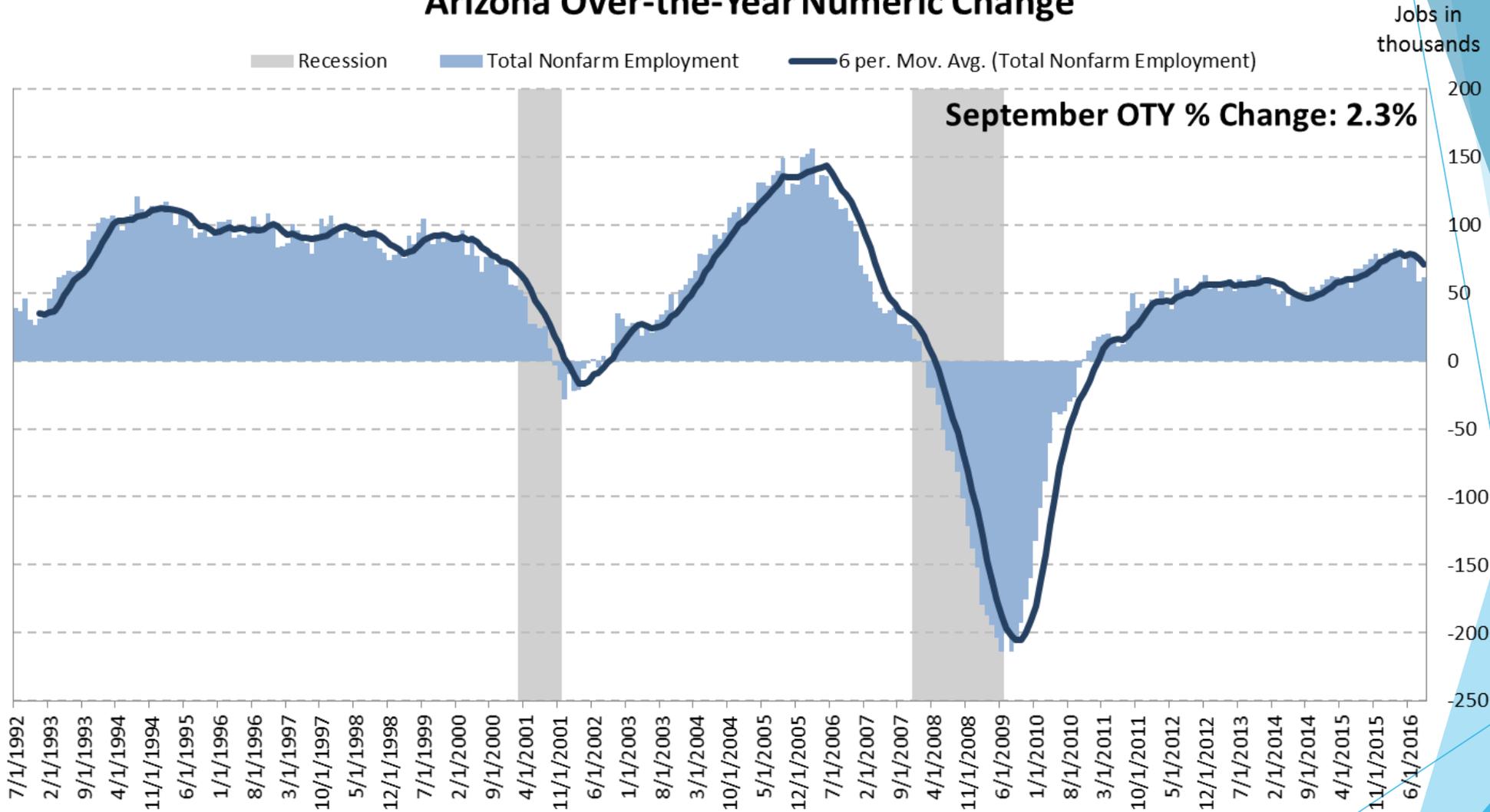
# Maricopa County Over-the-Year Numeric Change



Source: Produced by the Arizona Office of Economic Opportunity in cooperation with the U.S. Dept. of Labor, Bureau of Labor Statistics

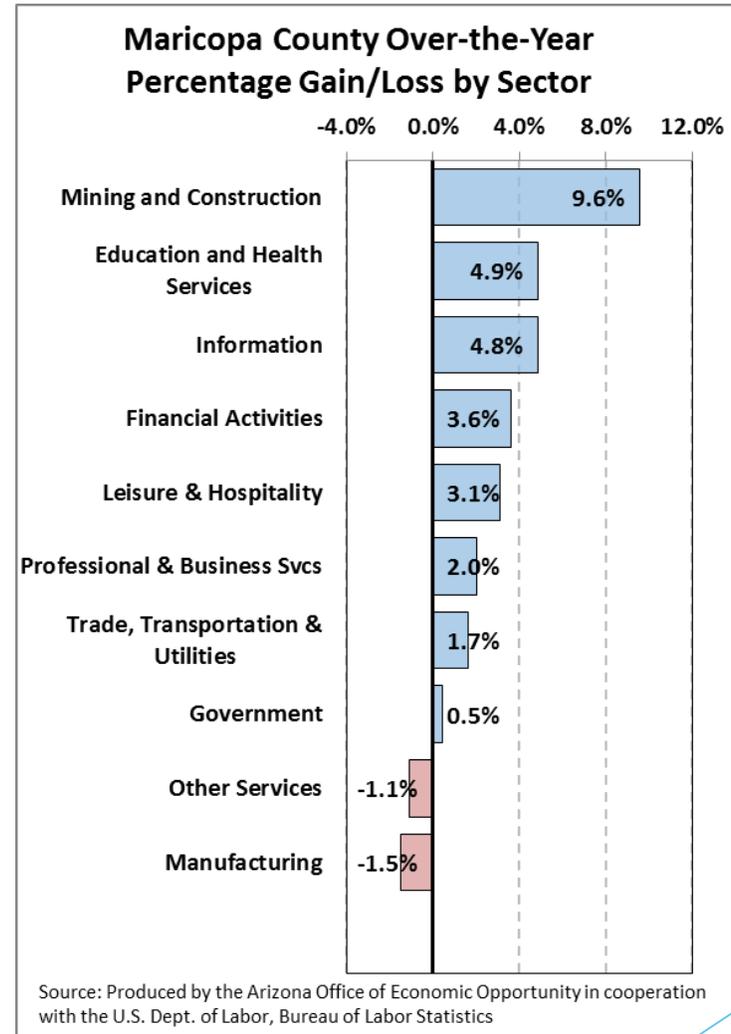
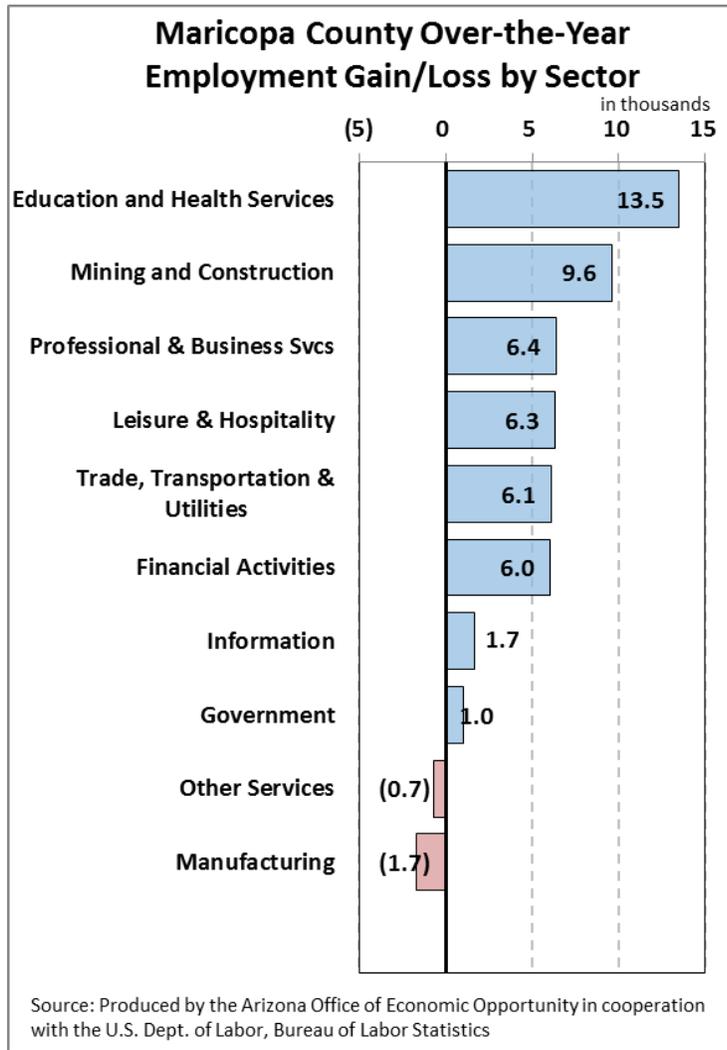
Source: Produced by the Arizona Office Economic Opportunity using CES data in cooperation with the U.S. Dept. of Labor, Bureau of Labor Statistics

# Arizona Over-the-Year Numeric Change



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

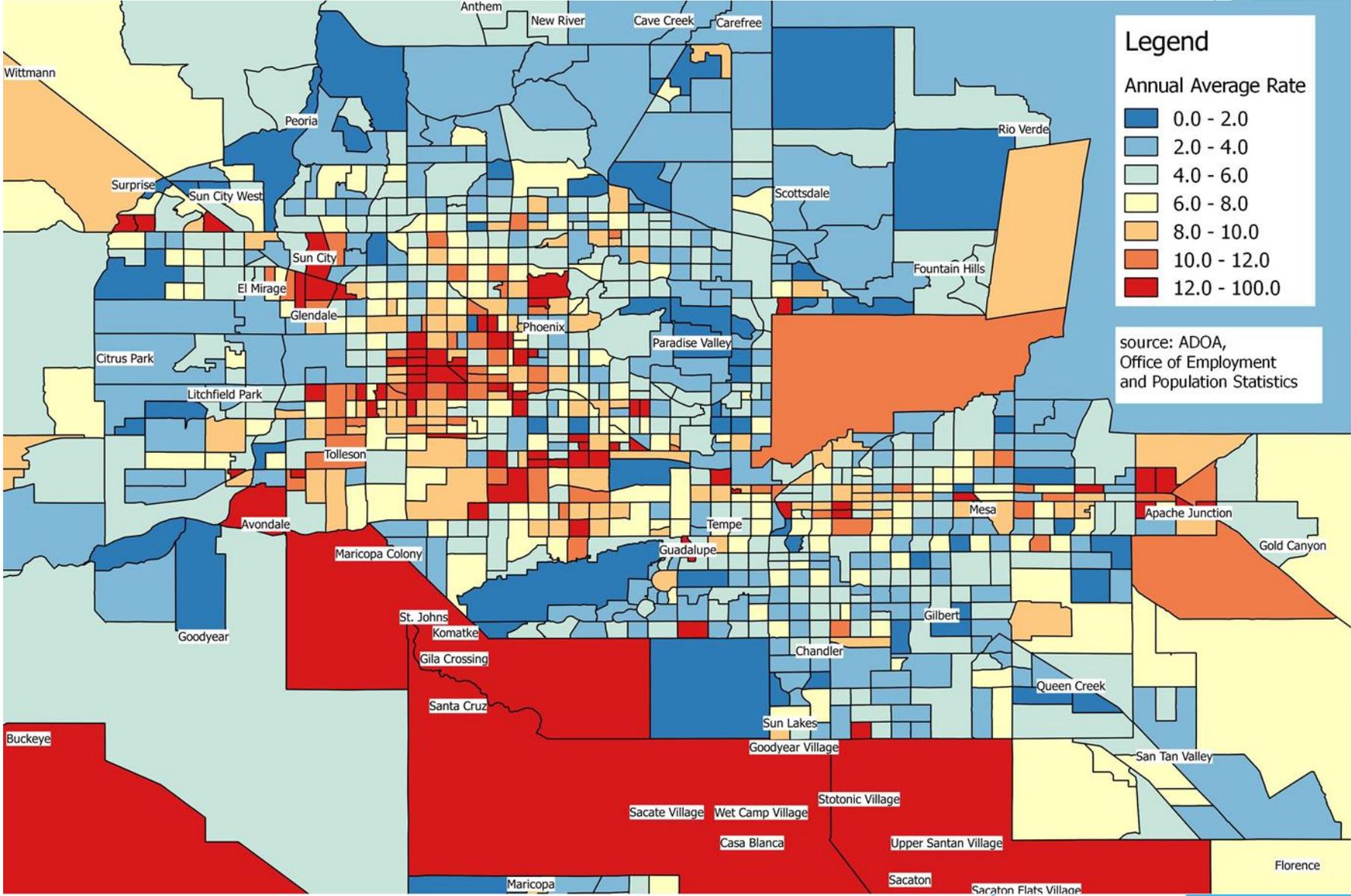
# September 2016 Nonfarm Employment Report



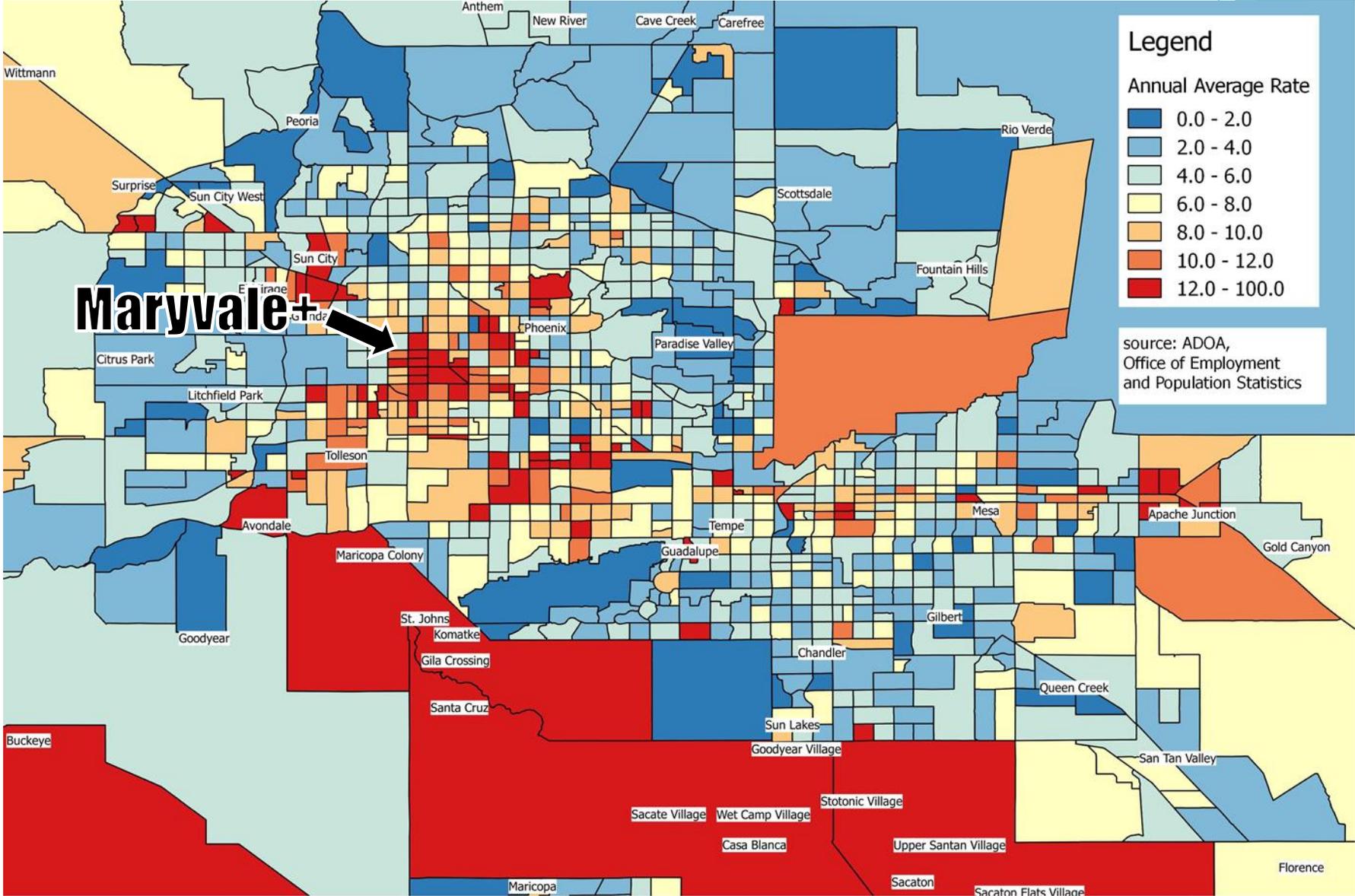
Source: Produced by the Arizona Office Economic Opportunity using LAUS data in cooperation with the U.S. Dept. of Labor, Bureau of Labor Statistics

# Case Study: Maryvale+

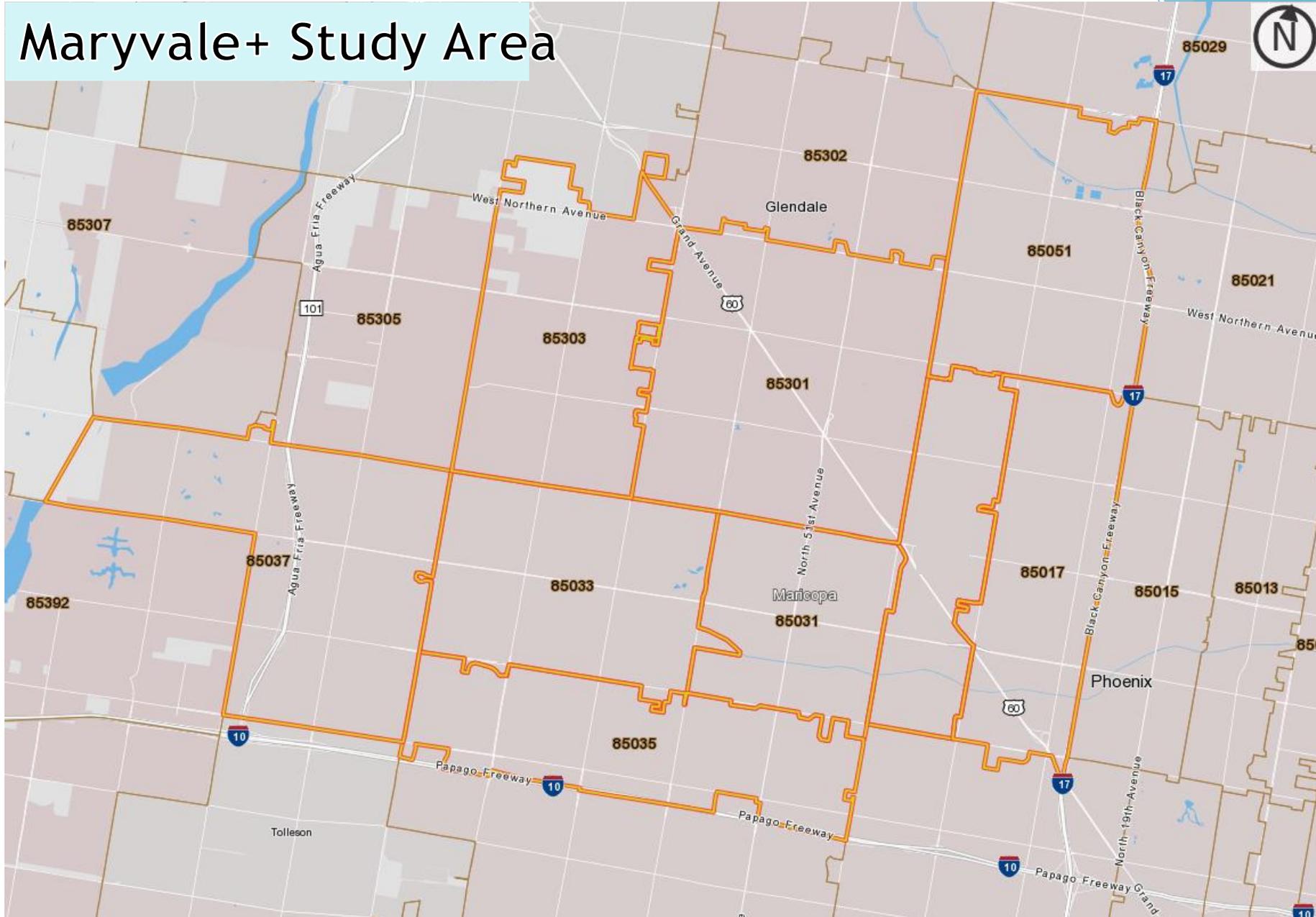
# 2014 Phoenix Area Unemployment Rates by Census Tract



# 2014 Phoenix Area Unemployment Rates by Census Tract



# Maryvale+ Study Area



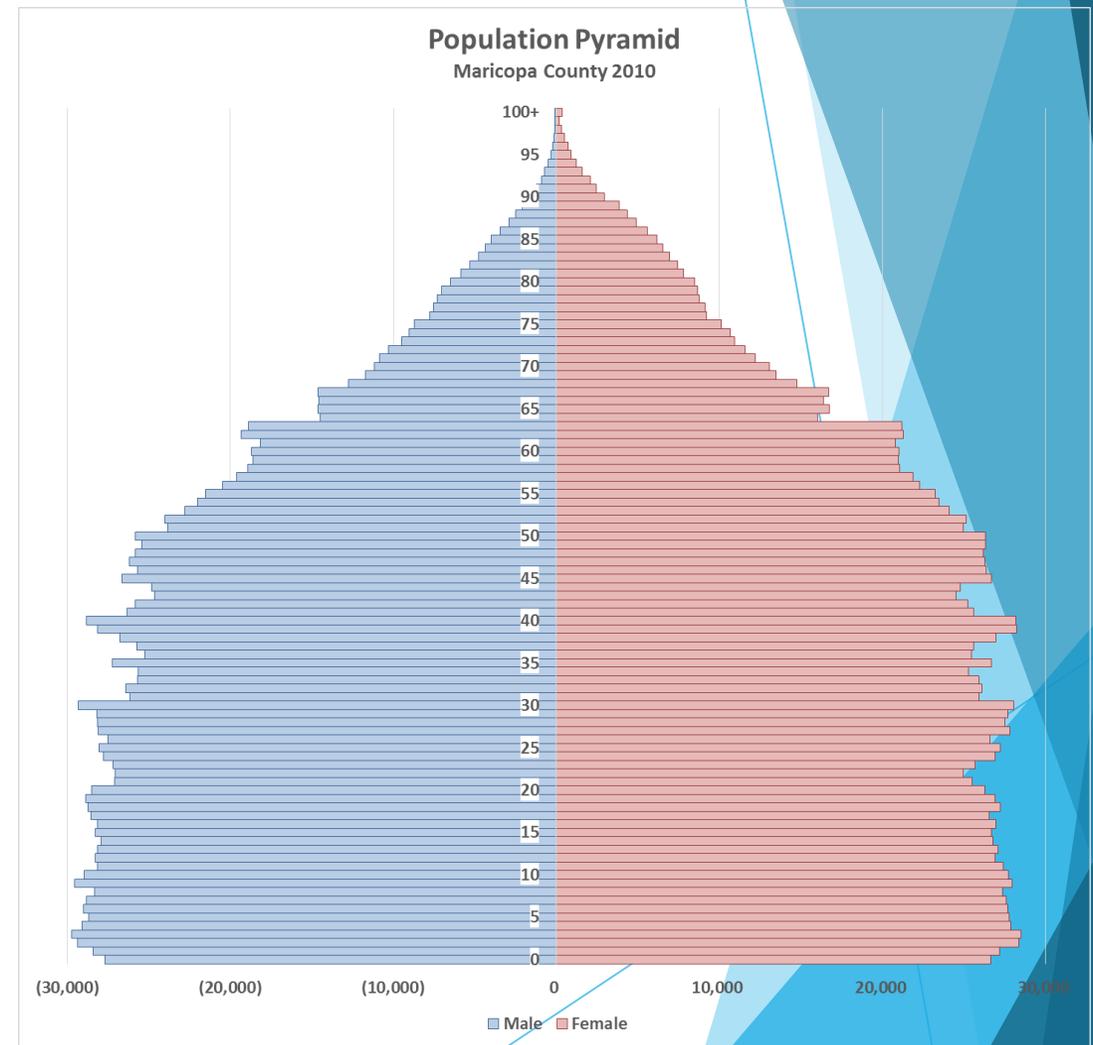
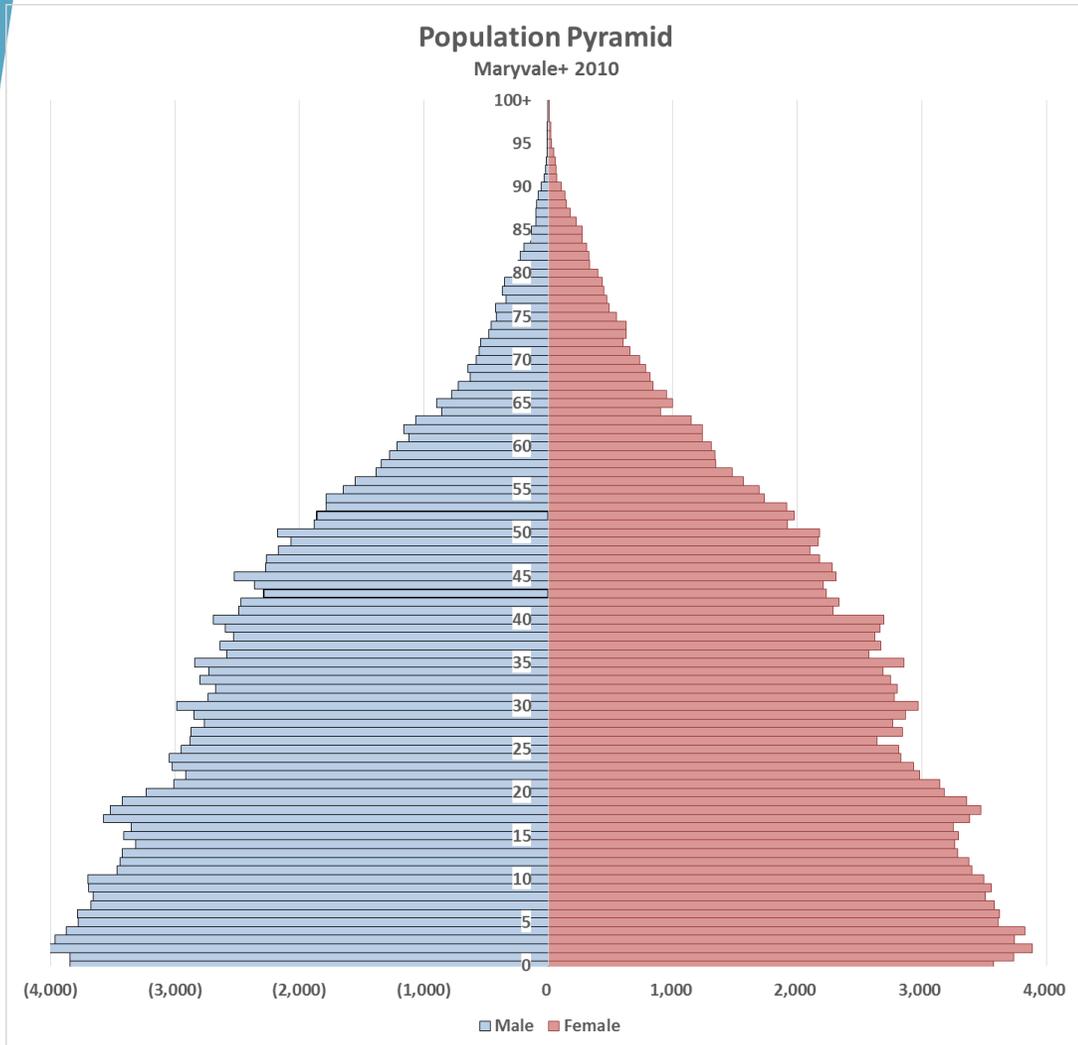
The background features abstract, overlapping geometric shapes in various shades of blue, ranging from light sky blue to dark navy blue. These shapes are primarily located on the left and right sides of the frame, creating a modern, layered effect. The central area is white, providing a clean backdrop for the text.

# Maryvale+

# Demographics

# Maryvale+

# Maricopa County



# Population by Place of Birth

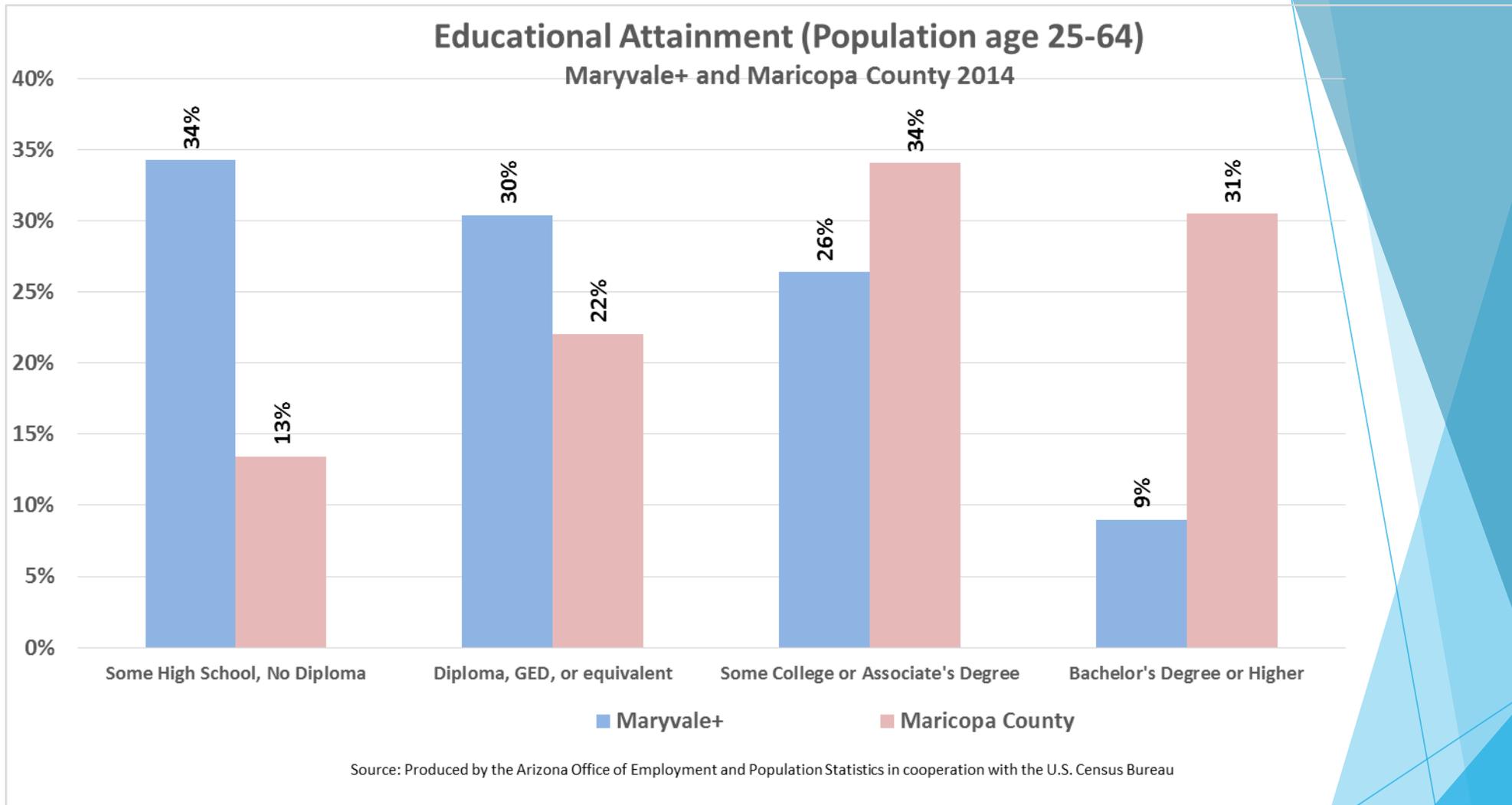
## Maryvale+ and Maricopa County 2014

<u>Total (All Ages)</u>	<u>Maryvale+</u>	<u>Maricopa County</u>	<u>Share of Maricopa County</u>
Population	391,947	3,947,382	9.9%
• U.S. Born	276,463	3,360,500	8.2%
• Foreign Born	115,484	586,882	19.7%
○ Naturalized	26,608	213,350	12.5%
○ Not a U.S. Citizen	88,876	373,532	23.8%

# Employment Challenges

## Maryvale+ and Maricopa County 2014

	<u>Maryvale+</u>	<u>Maricopa County</u>
Speaks English less than “very well”	14.3%	2.6%
Under 65 with a disability	7.6%	6.8%
Dependents under 18	33.2%	25.7%
Lacks access to a vehicle	10.8%	6.8%
Spends more than 30% of gross income on rent	56.5%	47.2%



- **Maryvale+ residents have less formal education than Maricopa County**

# Comparing Populations Age 16 and Older

## Maryvale+ and Maricopa County 2014

<u>Age 16+</u>	<u>Maryvale+</u>	<u>Maricopa County</u>	<u>Share of Maricopa County</u>
Population	275,178	3,047,709	9.0%
Labor Force Participation	170,866	1,941,391	8.8%
Employed	146,251	1,764,624	7.9%
Unemployed	24,493	172,784	14.2%

- The 16+ population of Maryvale+ is a substantial proportion of Maricopa County
- Maryvale+ contains a disproportionate number of the unemployed workers in Maricopa County

# Labor Statistics Comparison

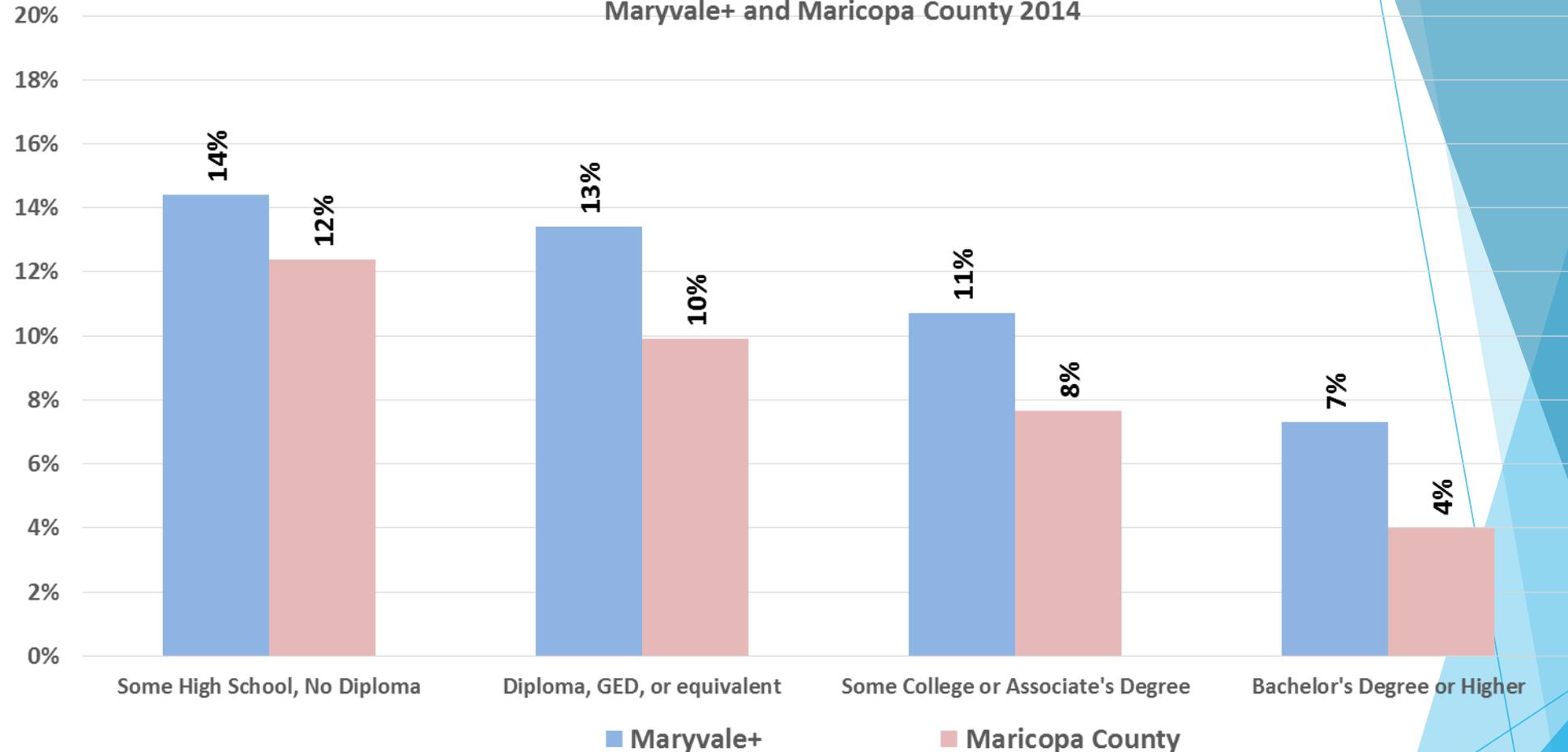
## Maryvale+ and Maricopa County 2014

<u>Age 16+</u>	<u>Maryvale+</u>	<u>Maricopa</u> <u>County</u>	<u>Maricopa-</u> <u>(Maricopa County Minus</u> <u>Maryvale+)</u>
Labor Force Participation Rate	62.1%	63.7%	63.9%
Unemployment Rate	14.3%	8.9%	8.4%

- Maryvale+ has a higher proportion of unemployed workers actively seeking employment

## Unemployment by Educational Attainment (Population 25-64)

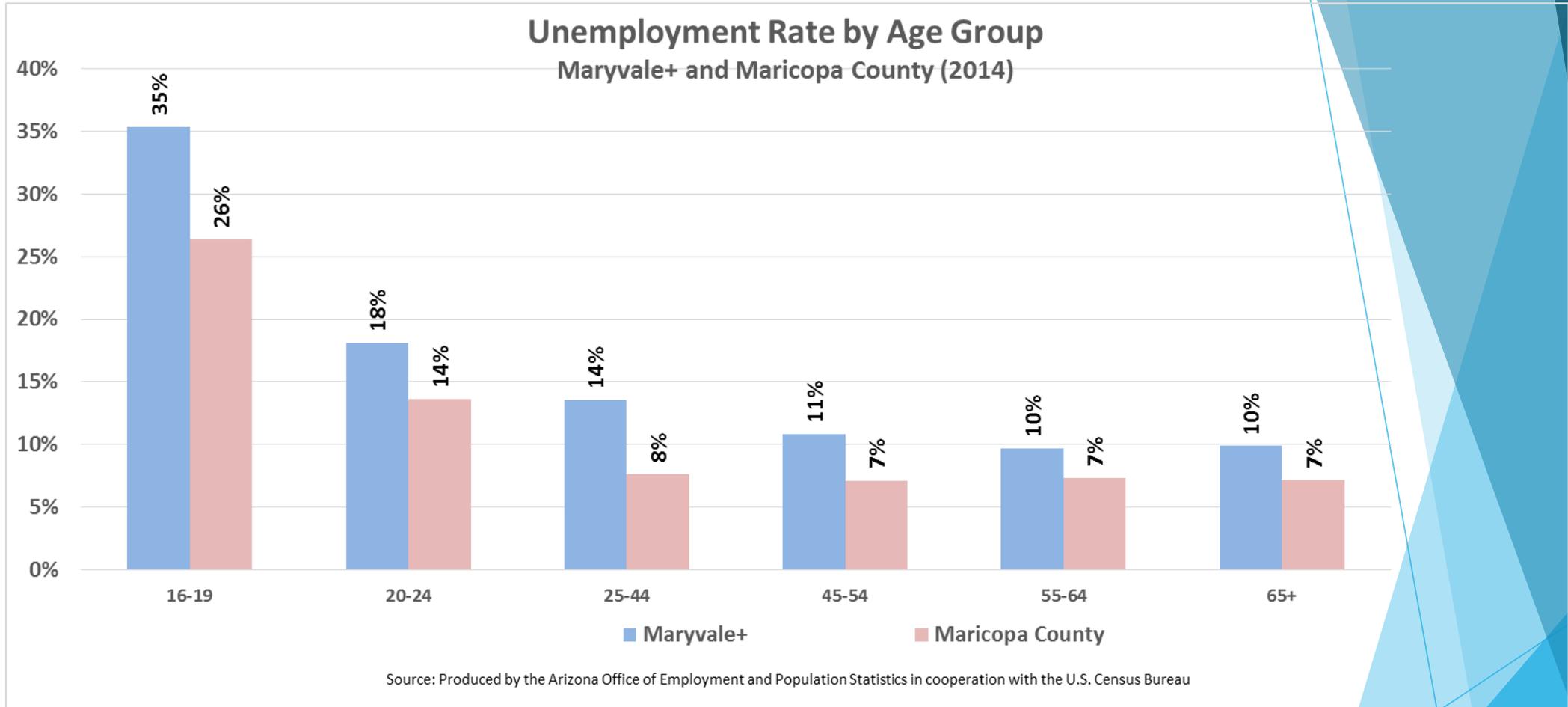
Maryvale+ and Maricopa County 2014



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

- Maryvale+ has higher unemployment rates regardless of educational attainment than Maricopa County; however, these rates drop with higher educational attainment

Source: 2014 ACS 5-year estimates table S2301



- Younger workers experience higher rates of unemployment than older workers regardless of location

Source: 2014 ACS 5-year estimates table S2301

# Population at or Below the Federal Poverty Line

## Maryvale+ and Maricopa County 2014

<u>At or Below Poverty Line</u>	<u>Maryvale+</u>	<u>Maricopa County</u>	<u>Maricopa-</u> <small>(Maricopa County Minus Maryvale+)</small>
Numeric	135,999	666,210	530,211
Percentage	34.9%	17.1%	15.1%

- 20% of the people in poverty within Maricopa County in live in Maryvale+

# Maryvale+ Population and Social Services

Maryvale+ population represents 5% of the State's population though represents approximately:

- 12% of the State's 200,000 unemployed
- 9% of the State's 500,000 SNAP recipients
- 22% of the State's 900,000 adult AHCCCS recipients
- 28% of the State's 5,000 TANF Cash Assistance recipients

In addition, approximately 7% of inmates released annually from the Department of Corrections are residents of the Maryvale+ area.

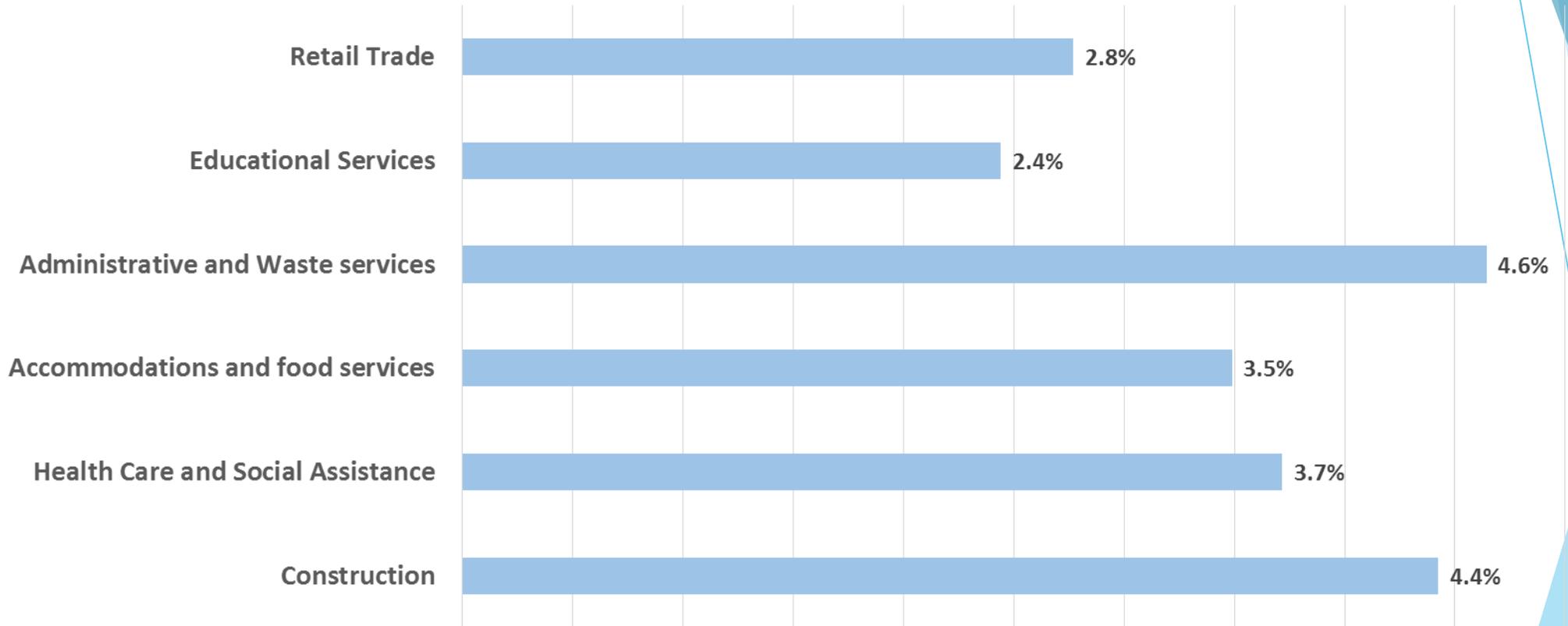
# Educational Attainment of Unemployed Individuals

Maryvale+ 2014; Individuals Age 25-64

<u>Educational Attainment</u>	<u>Maryvale+</u>
Some High School, No Diploma	5,979
High School Diploma or Equivalent	5,561
Some College or Associate's	4,070
Bachelor's or Higher	946
Ed Level Unknown (Age 16-24)	7,601
<hr/>	
Total	24,157

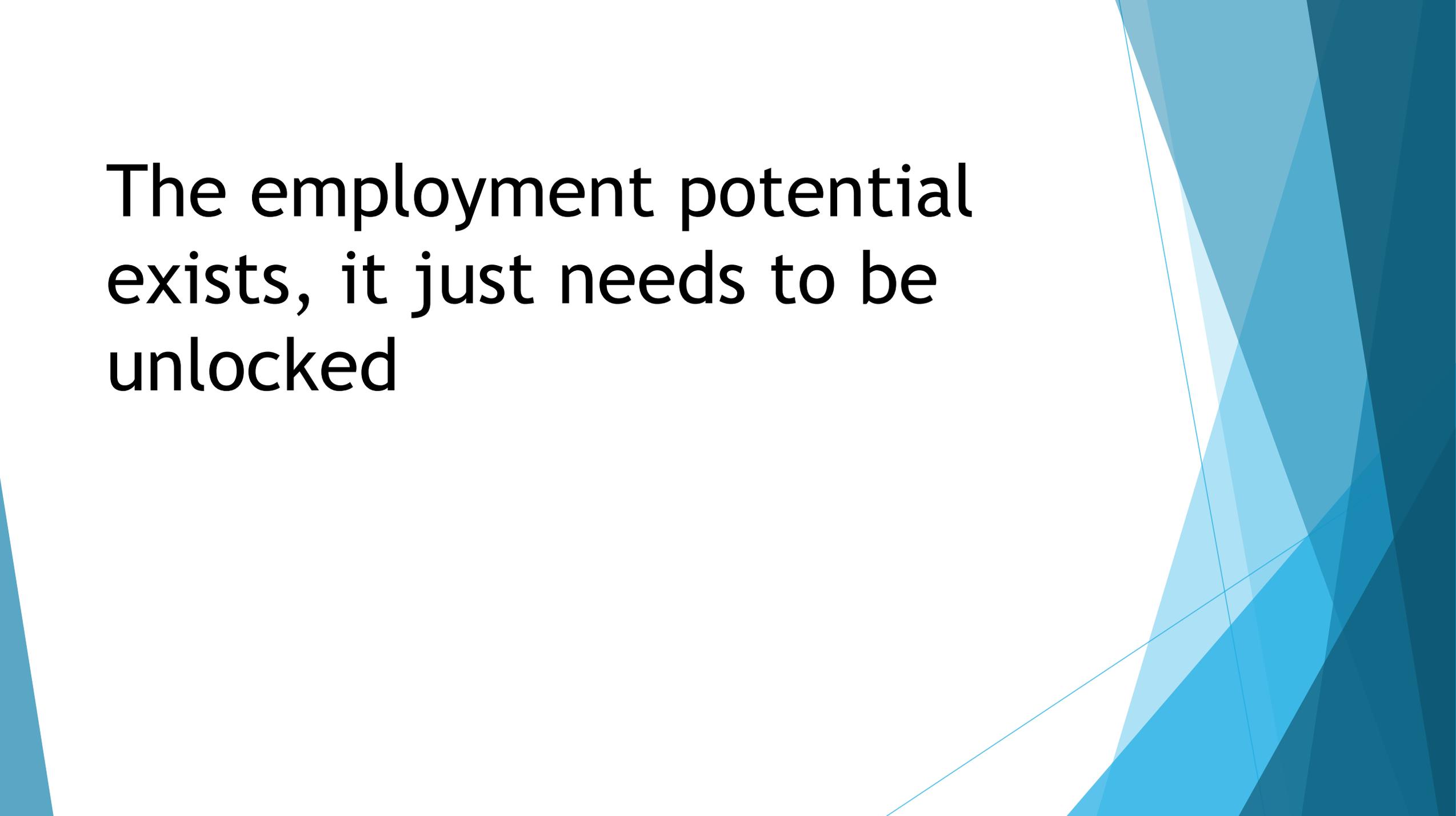
Unemployed workers in Maryvale+ represent significant workforce potential

### Top Industries in Maryvale+ 2011-2015 Annualized Percentage Growth; Phoenix MSA



- The largest industries in Maryvale+ are growing
- These industries will remain relevant in Maryvale+ for the foreseeable future

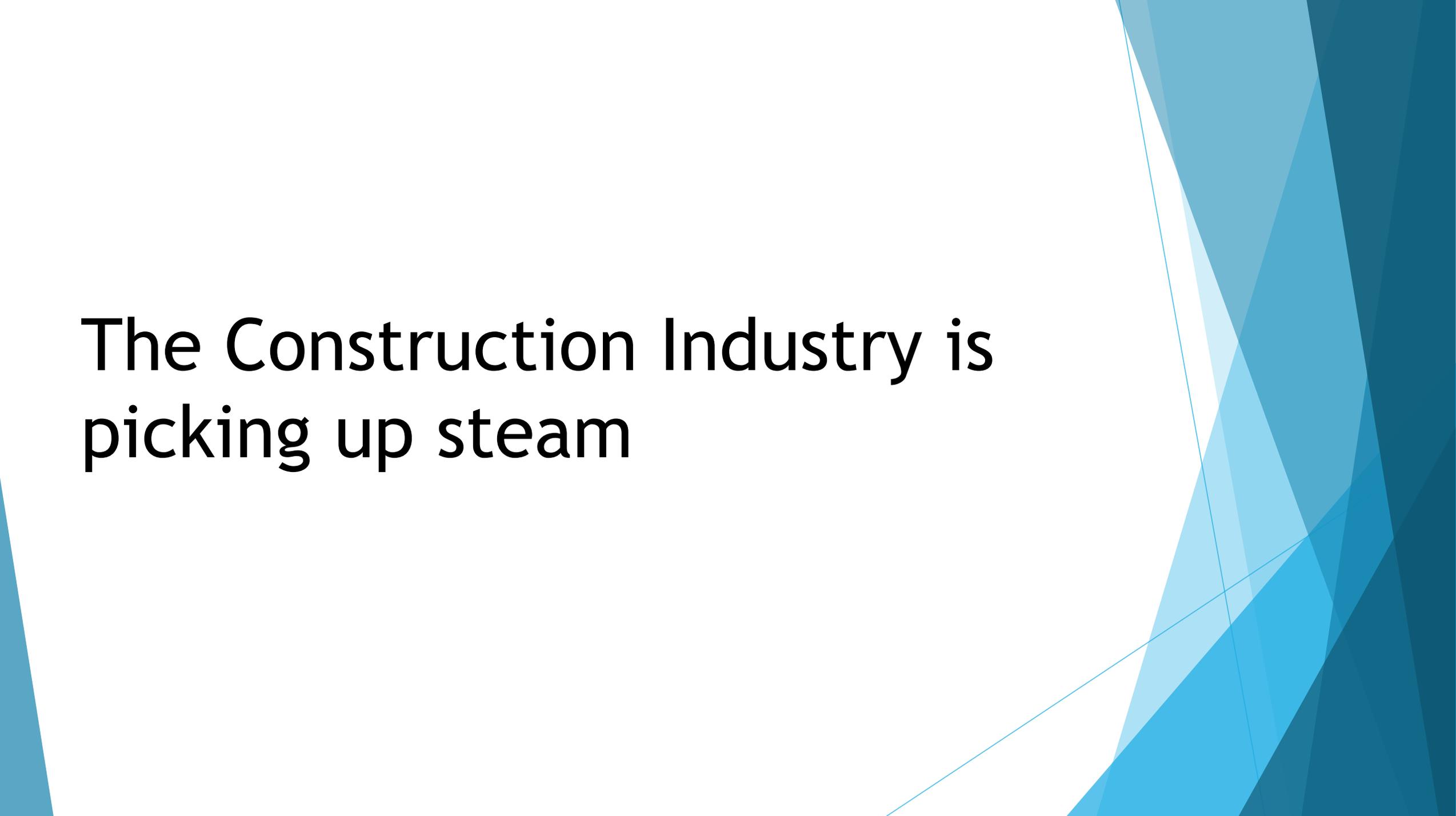
The employment potential  
exists, it just needs to be  
unlocked

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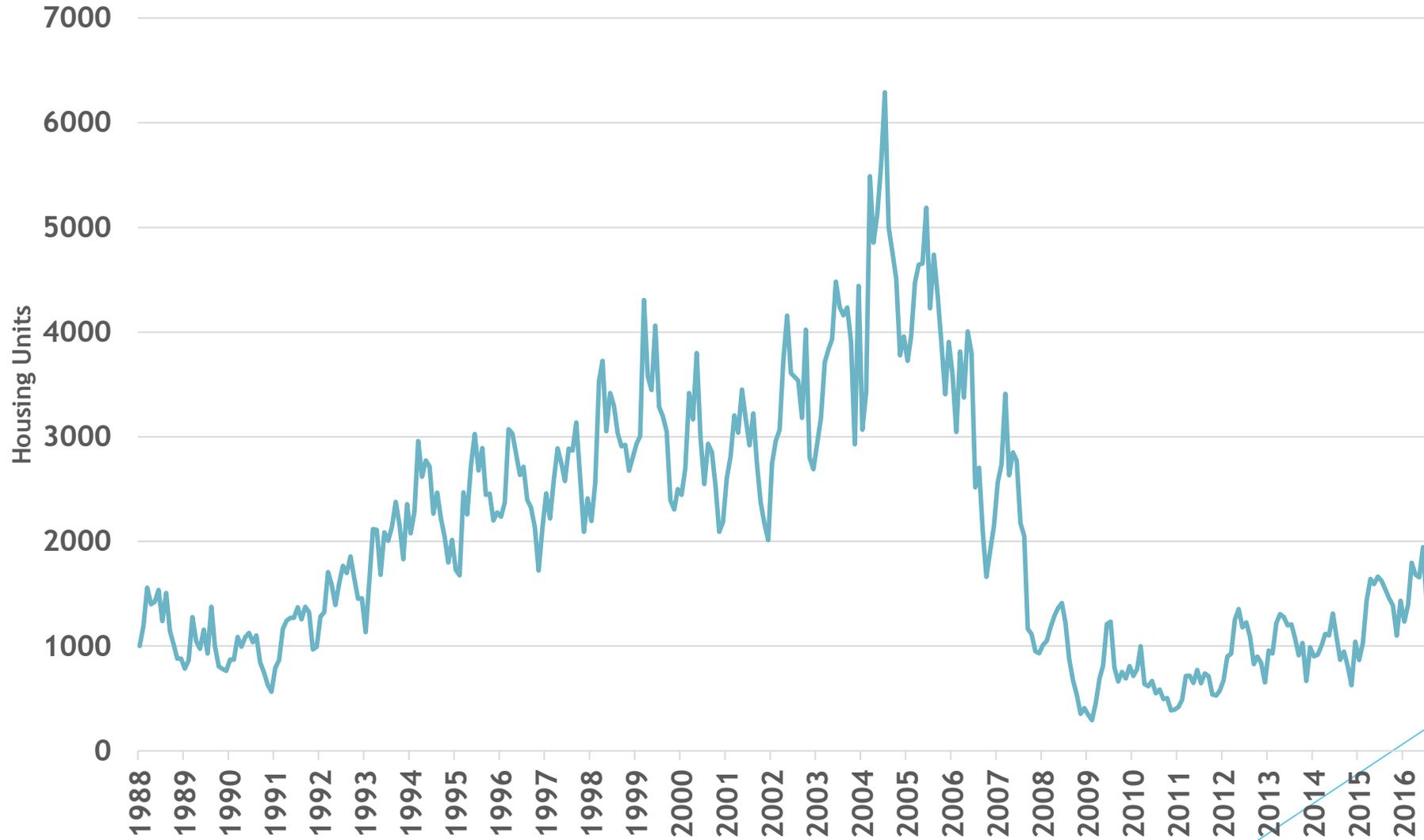
The background features abstract, overlapping geometric shapes in various shades of blue, ranging from light sky blue to dark navy blue. These shapes are primarily located on the left and right sides of the page, framing the central text. The overall aesthetic is clean and modern.

# Sector Highlights Construction

The Construction Industry is  
picking up steam

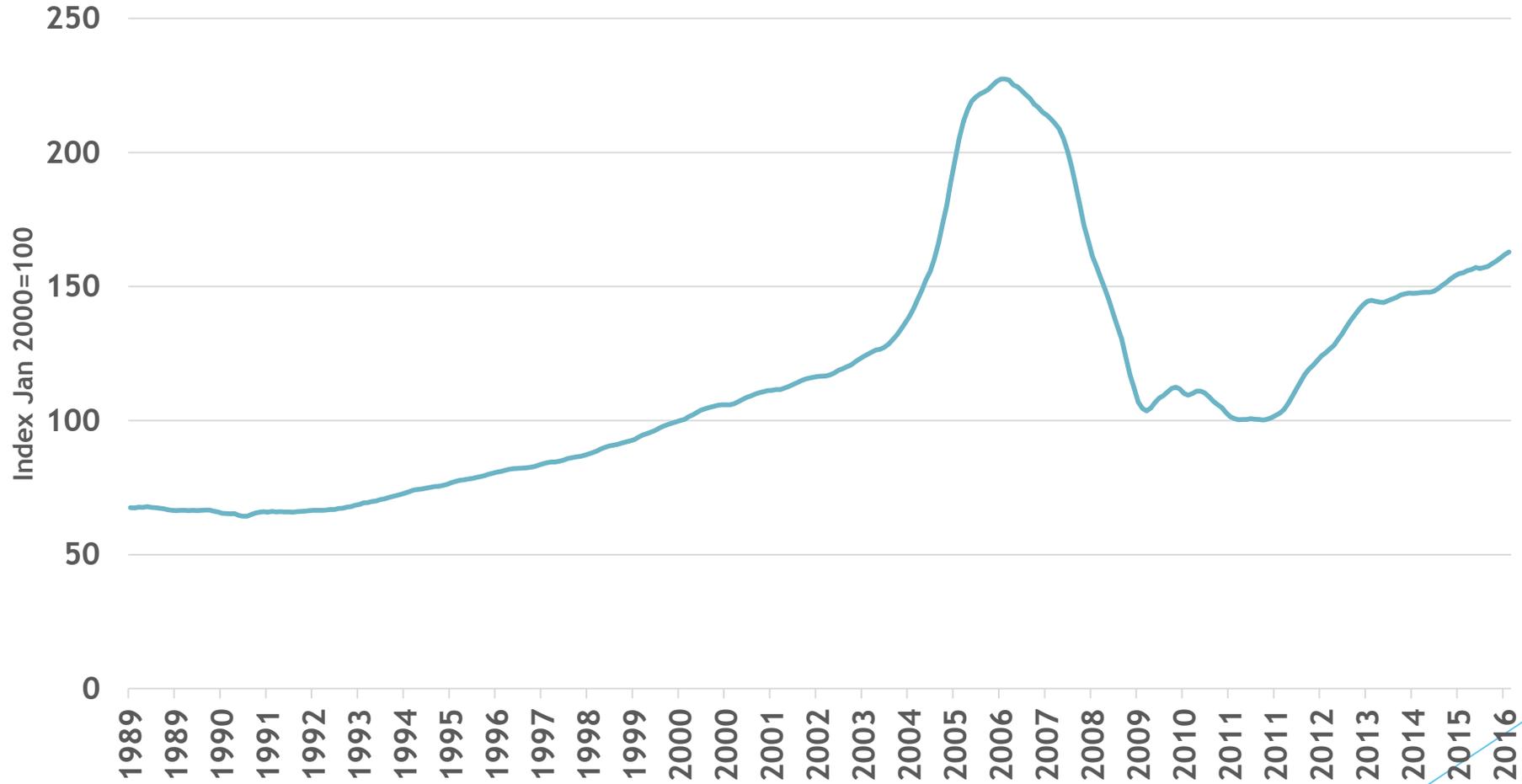
The background features a series of overlapping, semi-transparent blue geometric shapes, primarily triangles and polygons, that create a dynamic, layered effect. The colors range from light sky blue to deep navy blue. The shapes are positioned on the right side of the frame, with some extending towards the center, creating a sense of depth and movement.

# New Private Housing Units Authorized by Building Permits Phoenix MSA



Source: US Bureau of the Census

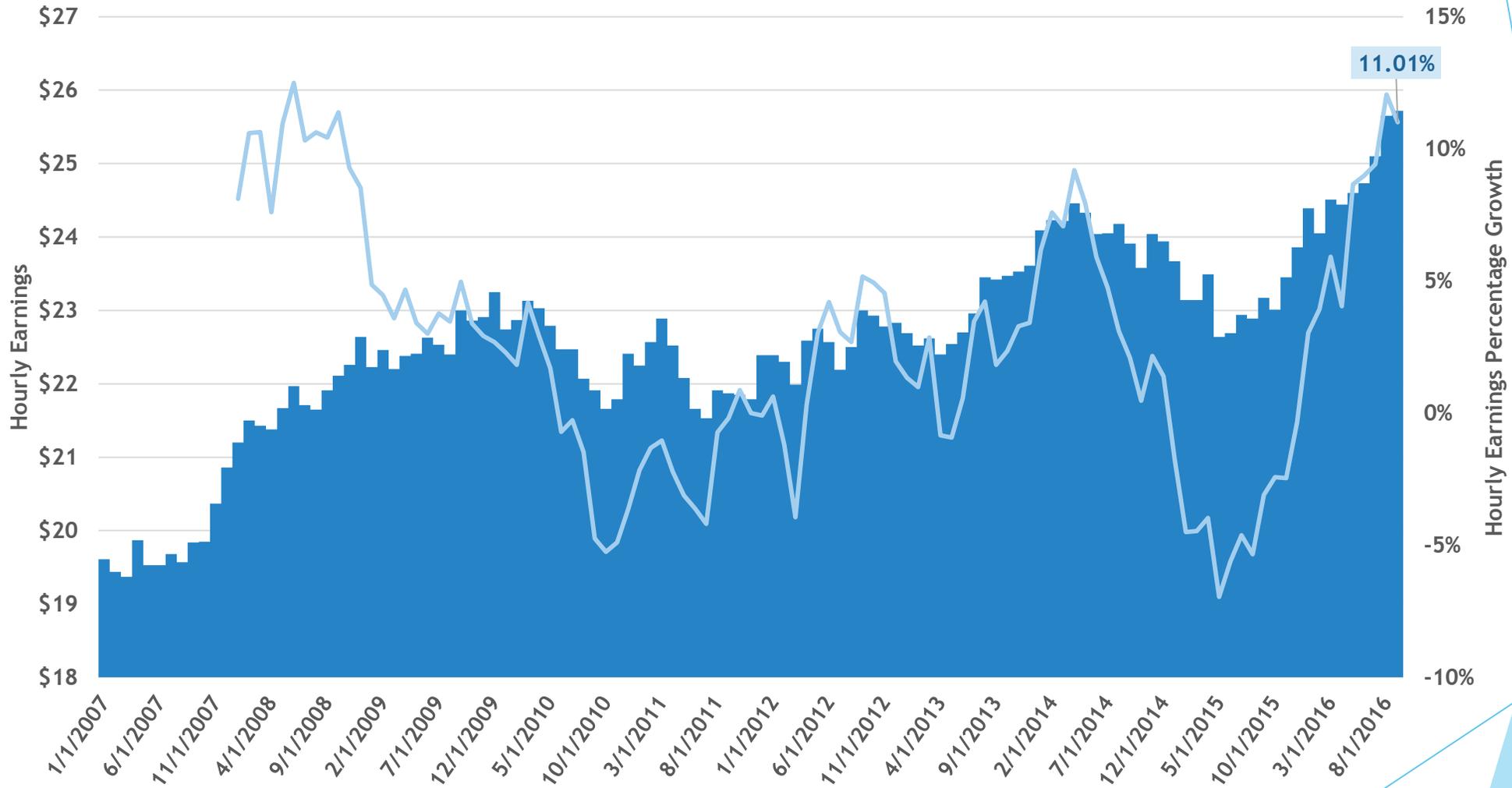
## S&P/Case-Shiller Home Price Index Phoenix MSA



Source: S&P Dow Jones Indices LLC

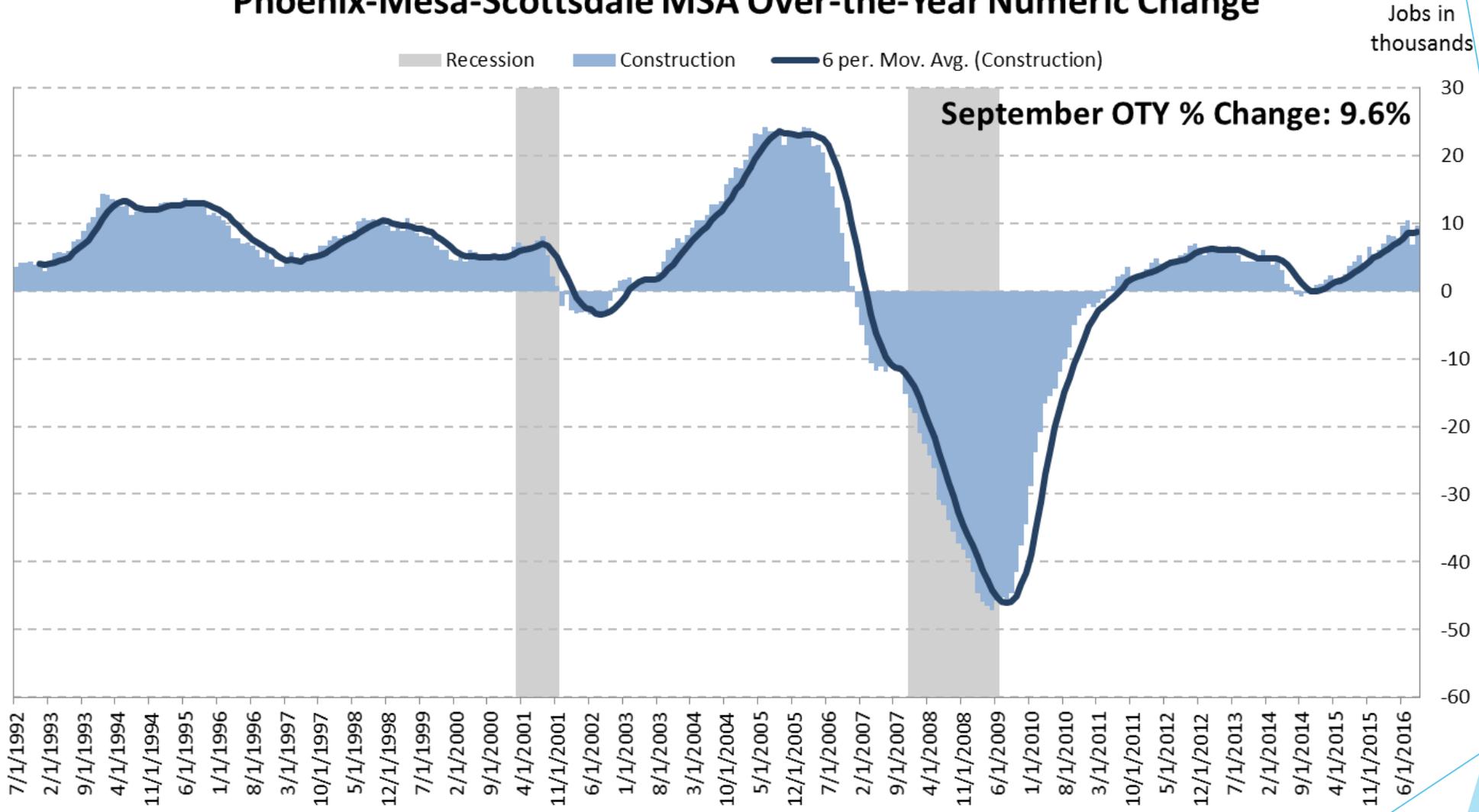
# Over the Year Arizona Average Earnings per Hour in Construction

Hourly Earnings    Year-Over-Year Growth in Hourly Earnings



Source: S&P Dow Jones Indices LLC

# Phoenix-Mesa-Scottsdale MSA Over-the-Year Numeric Change

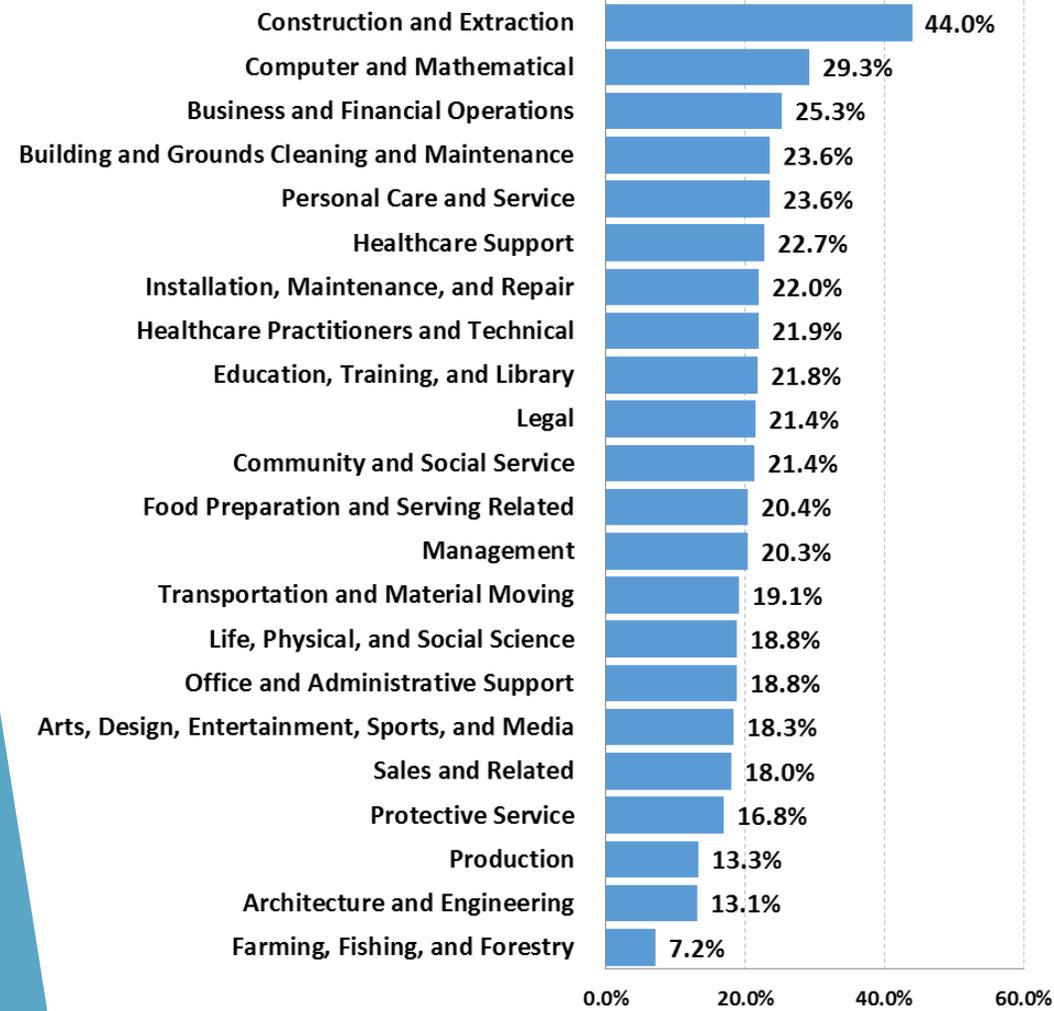


Source: Produced by the Arizona Office of Economic Opportunity in cooperation with the U.S. Dept. of Labor, Bureau of Labor Statistics

Construction jobs have increased by nearly 10,000 from September of 2015

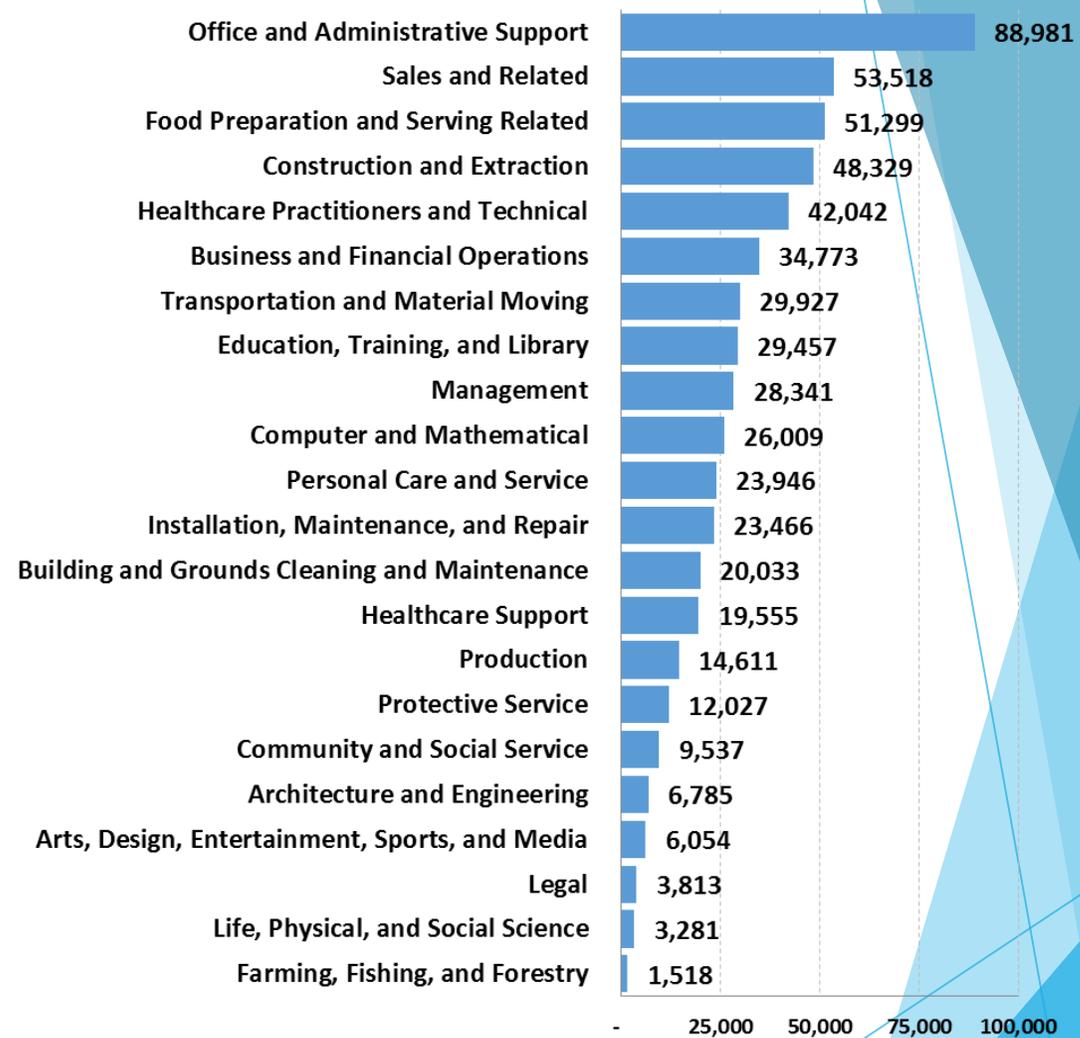
## Arizona Major Occupational Groups

2014 - 2024 Total Percentage Change



## Arizona Major Occupational Groups

2014 - 2024 Total Numeric Change



Construction occupations are projected to grow by 44% over the next decade which translates into 48,329 new construction jobs  
 Computer and Mathematical occupations are projected to grow by 29.3% which translates into 26,009 jobs

## Average Age of New Construction Hires

Age	2005 Q1 - 2005 Q4		2009 Q3 - 2010 Q2		2014 Q3 - 2015 Q2	
	Employment Level	Employment Share	Employment Level	Employment Share	Employment Level	Employment Share
14-18	5,721	7.5%	493	2.3%	667	2.5%
19-21	7,273	9.6%	1,242	5.7%	1,662	6.1%
22-24	7,504	9.9%	1,525	7.0%	2,072	7.7%
25-34	21,341	28.0%	5,822	26.7%	7,214	26.7%
35-44	17,004	22.3%	5,303	24.4%	6,571	24.3%
45-54	10,551	13.9%	4,208	19.3%	5,375	19.9%
55-64	4,348	5.7%	1,587	7.3%	2,597	9.6%
65-99	2,391	3.1%	1,587	7.3%	904	3.3%

Individuals 24 and younger represented 27.0% in 2005, but now represent only 16.3% of Construction jobs

<b>Earnings of Arizona Construction Industry by Age; Stable Jobs</b>					
	<b>2004 Q3 - 2005 Q2</b>	<b>2009 Q3 - 2010 Q2</b>	<b>2014 Q3 - 2015 Q2</b>	<b>10 Year</b>	
<b>Age</b>	<b>Average Monthly Earnings</b>	<b>Average Monthly Earnings</b>	<b>Average Monthly Earnings</b>	<b>Numeric Change</b>	<b>Percentage Change</b>
14-18	\$1,603	\$1,416	\$1,595	-\$8	-0.5%
19-21	\$1,816	\$1,769	\$2,095	\$279	15.4%
22-24	\$2,220	\$2,321	\$2,575	\$356	16.0%
25-34	\$2,950	\$3,193	\$3,523	\$573	19.4%
35-44	\$3,636	\$3,868	\$4,378	\$742	20.4%
45-54	\$4,199	\$4,410	\$4,602	\$403	9.6%
55-64	\$4,027	\$4,558	\$4,953	\$926	23.0%
65-99	\$2,770	\$3,560	\$3,868	\$1,098	39.6%

Older workers, age 45-99, have benefited the most from employment and wage growth within the Construction industry since the beginning of the recession recovery.

The background features abstract, overlapping geometric shapes in various shades of blue, ranging from light sky blue to dark navy blue. These shapes are primarily located on the left and right sides of the frame, creating a modern, tech-oriented aesthetic. The central area is white, providing a clean space for the text.

# Sector Highlights Information Technology

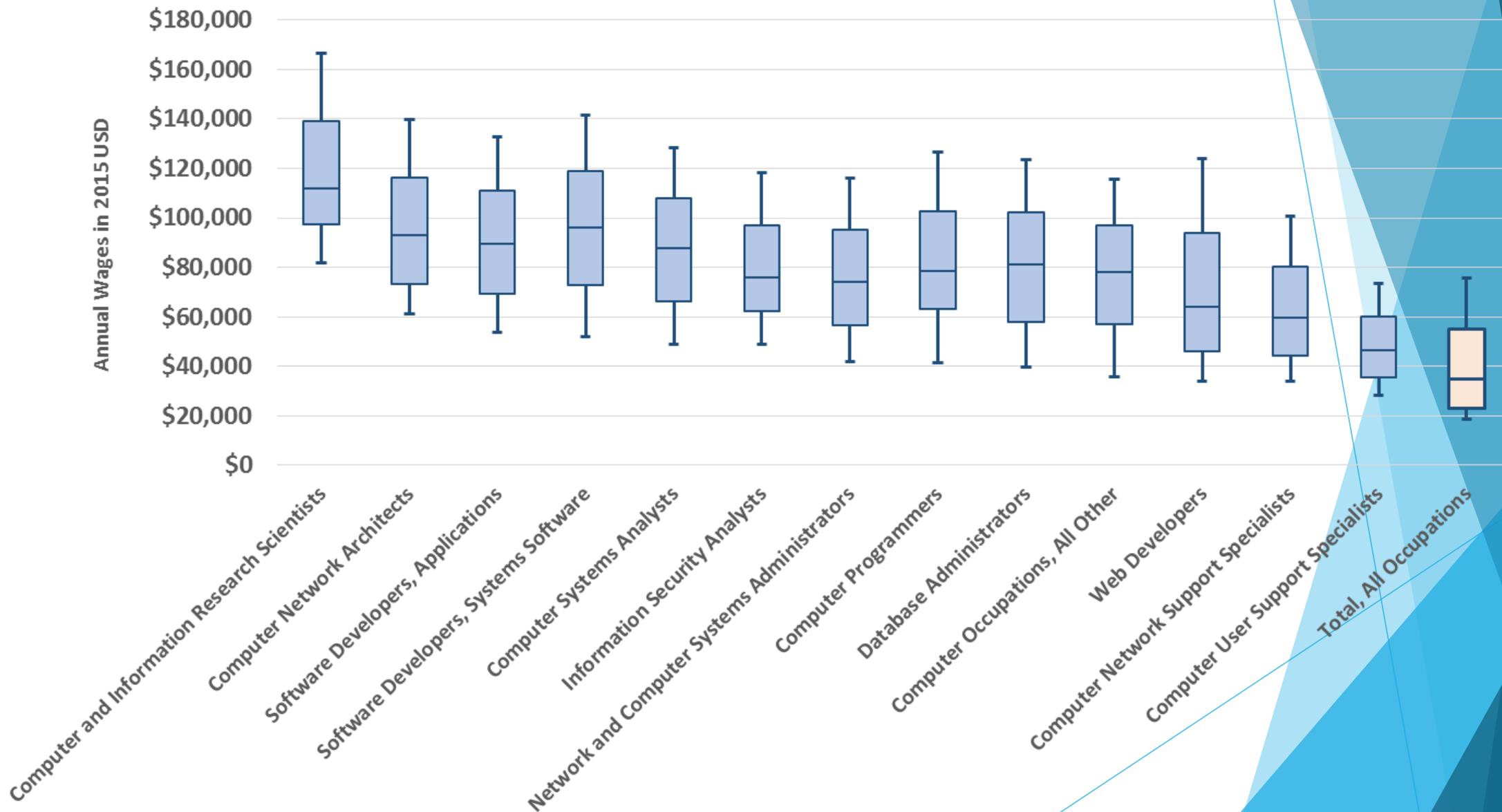
Maricopa County is good at IT  
and it's getting better

## Historical Occupational Data (Arizona, 2005 and 2015)

SOC	Title	2005 Mean Annual Wage	2015 Mean Annual Wage	Percentage Increase
00-0000	Total, All Occupations	\$35,028	\$45,310	29.4%
15-0000	Computer and Mathematical Occupations	\$59,576	\$80,020	34.3%

- Mean wages for Computer and Mathematical Occupations increased at a faster rate than for All Occupations
- Mean wages for Computer and Mathematical Occupations are significantly higher than the mean wages for All Occupations
- IT-related employment grew by 79.3% from 2005 to 2015, while all occupations only grew by 15.6%

## 2015 Annual Wage Ranges for Computer Occupations in Arizona (10th, 25th, 50th, 75th, and 90th Percentiles)



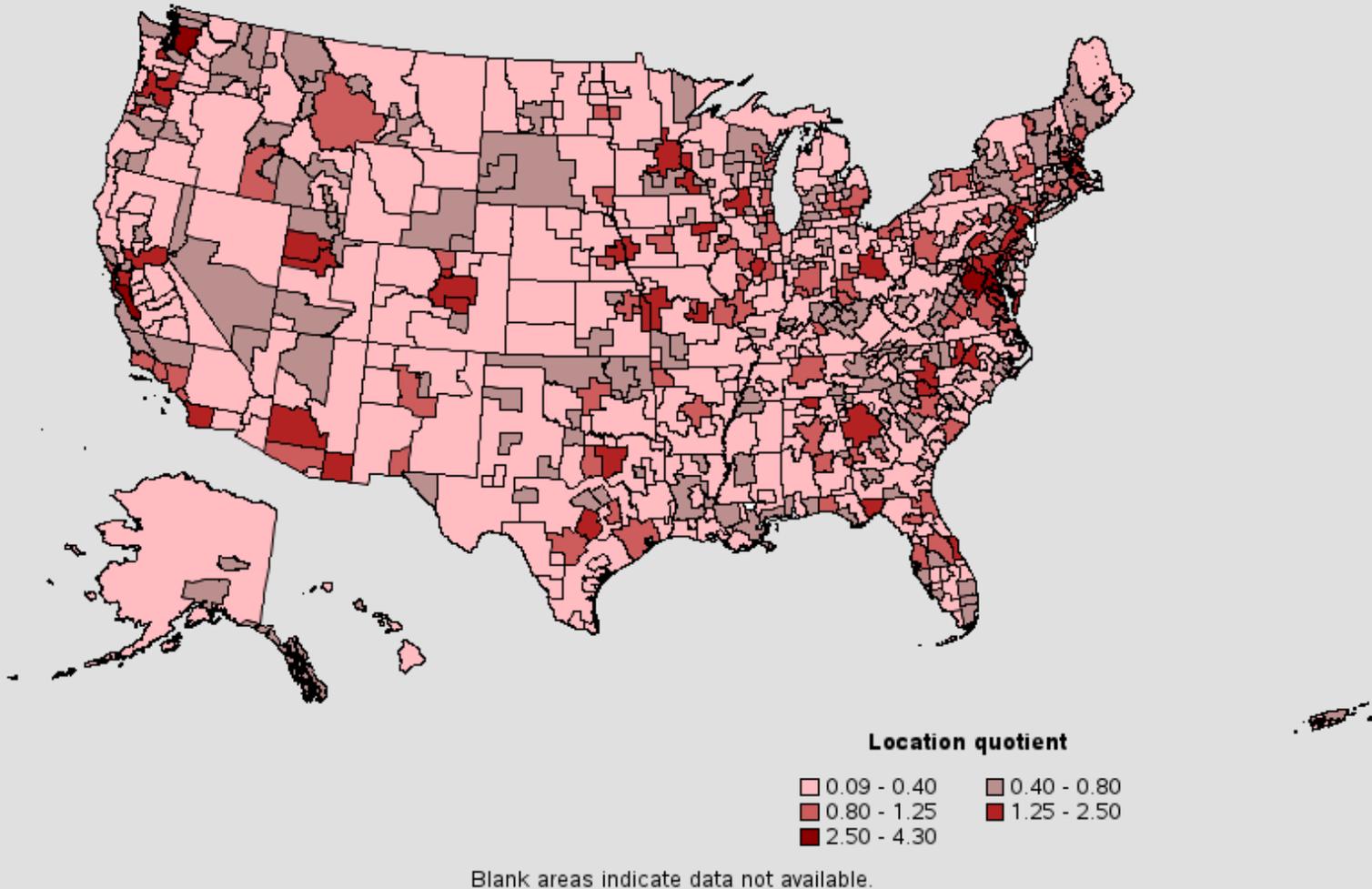
# Average Annual Wage and Education Requirements For Computer Occupations

SOC	Title	Average Annual Wage	Educational Requirements
15-1111	Computer and Information Research Scientists	\$118,670	Doctoral or Professional Degree
15-1133	Software Developers, Systems Software	\$96,570	Bachelor's Degree
15-1143	Computer Network Architects	\$96,200	Bachelor's Degree
15-1132	Software Developers, Applications	\$90,830	Bachelor's Degree
15-1121	Computer Systems Analysts	\$89,560	Bachelor's Degree
15-1131	Computer Programmers	\$82,400	Bachelor's Degree
15-1122	Information Security Analysts	\$80,850	Bachelor's Degree
15-1141	Database Administrators	\$80,360	Bachelor's Degree
15-1142	Network and Computer Systems Administrators	\$76,900	Bachelor's Degree
15-1199	Computer Occupations, All Other	\$76,740	Bachelor's Degree
15-1134	Web Developers	\$70,570	Associate's Degree
15-1152	Computer Network Support Specialists	\$68,060	Associate's Degree
15-1151	Computer User Support Specialists	\$49,840	Some College, No Degree
<b>00-0000</b>	<b>Total, All Occupations</b>	<b>\$45,310</b>	<b>N/A</b>

# Projected Growth for Computer Occupations (Arizona, 2014-2024)

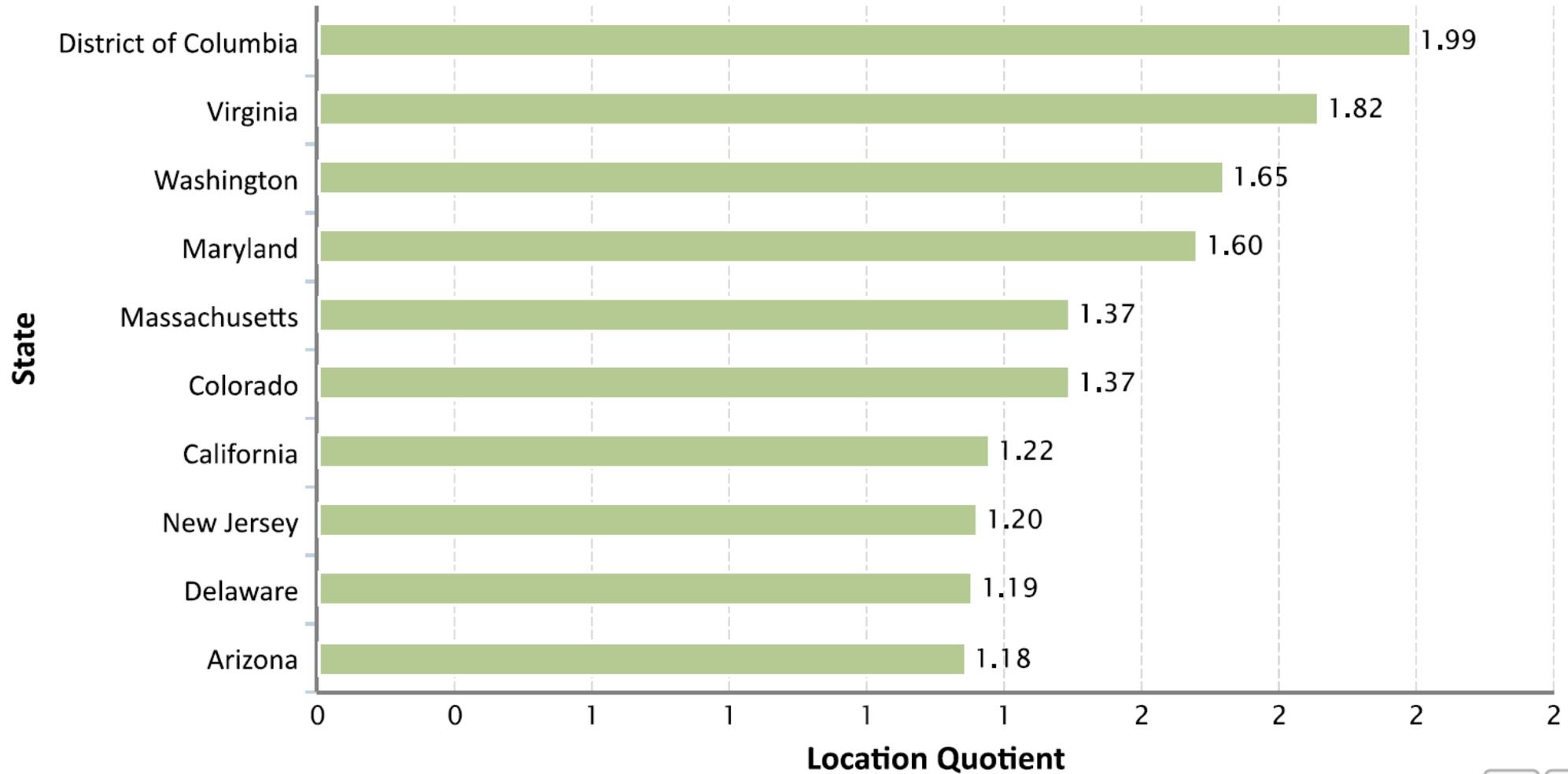
SOC	Title	Numeric Growth	2014 Estimated	2024 Projected	Percentage Growth
15-1121	Computer Systems Analysts	5,909	14,988	20,897	39.4%
15-1151	Computer User Support Specialists	4,131	14,430	18,561	28.6%
15-1132	Software Developers, Applications	4,125	13,881	18,006	29.7%
15-1133	Software Developers, Systems Software	1,813	8,951	10,764	20.3%
15-1142	Network and Computer Systems Administrators	1,796	7,375	9,171	24.4%
15-1152	Computer Network Support Specialists	1,408	5,675	7,083	24.8%
15-1134	Web Developers	1,244	2,717	3,961	45.8%
15-1143	Computer Network Architects	1,059	3,590	4,649	29.5%
15-1141	Database Administrators	893	3,605	4,498	24.8%
15-1122	Information Security Analysts	809	2,306	3,115	35.1%
15-1199	Computer Occupations, All Other	470	2,344	2,814	20.1%
15-1131	<b>Computer Programmers</b>	<b>129</b>	<b>4,802</b>	<b>4,931</b>	<b>2.7%</b>
15-1111	Computer and Information Research Scientists	30	151	181	19.9%
15-1100	Computer Occupations	23,816	84,815	108,631	28.1%
00-0000	Total, All Occupations	577,302	2,728,012	3,305,314	21.2%

## Location quotient of computer and mathematical occupations, by area, May 2015



- ▶ Location Quotient is a measure of density of an occupation or industry in an area
- ▶ A value greater than 1.0 indicates a higher concentration in the area
- ▶ Phoenix MSA, Tucson MSA, and Sierra Vista-Douglas MSA all show concentrations of IT occupations greater than the national average

### States with the highest location quotients for Computer and Mathematical Occupations, May 2015



Source: Bureau of Labor Statistics



# Computer Occupations by Location Quotient (Phoenix MSA, 2015)

SOC	Title	Location Quotient
15-1122	Information Security Analysts	1.92
15-1121	Computer Systems Analysts	1.73
15-1141	Database Administrators	1.68
15-1152	Computer Network Support Specialists	1.68
15-1143	Computer Network Architects	1.48
15-1133	Software Developers Systems Software	1.44
15-1134	Web Developers	1.36
15-0000	Computer and Mathematical Occupations	1.33
15-1151	Computer User Support Specialists	1.31
15-1132	Software Developers Applications	1.14
15-1142	Network and Computer Systems Administrators	1.10
15-1131	Computer Programmers	1.05
15-1199	Computer Occupations All Other	0.58

# Conclusion

- ▶ Maricopa County is showing strong Total Nonfarm job growth
- ▶ Most industries in Maricopa County grew in the last year (with the exceptions of Manufacturing and Other Services)
- ▶ This growth is not distributed equally throughout the entire County
- ▶ Maryvale+ is a section of Maricopa County with high rates of unemployment
- ▶ Maryvale+ is also a section of Maricopa County with a large potential workforce
- ▶ Both Computer Occupations and Construction Occupations will grow greatly in Arizona and Maricopa County from 2014-2024
- ▶ Computer Occupations and Construction Occupations tend to pay higher than average wages

# QUESTIONS?

**Contact:**

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