

# July 2015

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# Employment Report



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# Current Employment Statistics (CES)

## Ways to Analyze Employment Levels

### Over the Month

- Numeric/Percent Change
- Issue: Large influence of seasonal factors
- Main Use: Compare changes to previous years in the same month – comparison of previous years point-in-time estimates

### Over the Year

- Numeric/Percent Change
- Issue: Less influence of seasonal factors
- Main Use: Compare changes to previous time periods – long-term trends (growing, declining, accelerating, or decelerating)

## Over-The-Month Highlights

- **AZ unemployment rate (SA) increased two-tenths of a percentage point in July to 6.1%**
- **US unemployment rate (SA) remained at 5.3% in July**
- **Arizona shed 7,200 Nonfarm jobs, less than the post-recessionary ('10-'14) average loss of 26,200**
- **The Private Sector gained 6,300 jobs**
- **Government lost 13,500 jobs in July**

## Over-The-Month Highlights

- **Eight of the eleven major sectors added jobs**
  - **Professional & Business Services, Trade Transp. & Utilities, Construction, Manufacturing, Other Services, Financial Activities, Information, and Natural Resources & Mining**
- **Three major sectors reported losses**
  - **Government, Leisure & Hospitality, and Education & Health Services**
- **Professional & Business Services had the largest gain with 3,700 jobs**
- **Government shed the most jobs (-13,500), the largest loss of any sector**

## Over-The-Year Highlights

- **Arizona added 67,600 Nonfarm jobs (2.7%)**
- **Year-to-date annual Nonfarm employment growth is 2.4%**
- **Private Sector added 73,500 jobs (3.4%)**
- **Government lost 5,900 jobs (-1.6%)**
- **Eight major sectors added jobs and three reported losses**
- **Largest employment gains: Professional & Business Services (18,600 jobs) and Education and Health Services (16,600 jobs)**
- **Losses include Government (-5,900 jobs), Natural Resources & Mining (-500 jobs) and Information (-100 jobs)**

## Over-The-Year Highlights

- **Eight major sectors added jobs**
  - **Professional & Business Services, Educational & Health Services, Leisure & Hospitality, Trade Transportation and Utilities, Other Services, Construction, Financial Activities, and Manufacturing**
- **Three major sectors reported losses**
  - **Government, Natural Resources and Mining, and Information**
- **Largest employment gains: Professional & Business Services (18,600 jobs) and Education and Health Services (16,600 jobs)**
- **Losses include Government (-5,900 jobs), Natural Resources & Mining (-500 jobs), and Information (-100 jobs)**

## Help Wanted Online (HWOL) Job Postings

- **HWOL is produced by the Conference Board as a time series of new and total monthly online job ads**
- **Job postings are compiled from online job boards, company websites, and newspapers using spidering technology (e.g. Monster, CareerBuilder, Employer and Government Job Boards)**
- **Postings are collected and continually updated at regular frequency with de-duplication logic applied**
- **Data are parsed to produce information on hiring demand including top employers, job types (full/part-time) and industry groups**
- **Geographically comprehensive (State, MSA, County, Cities)**

## Considerations when analyzing HWOL Job Postings

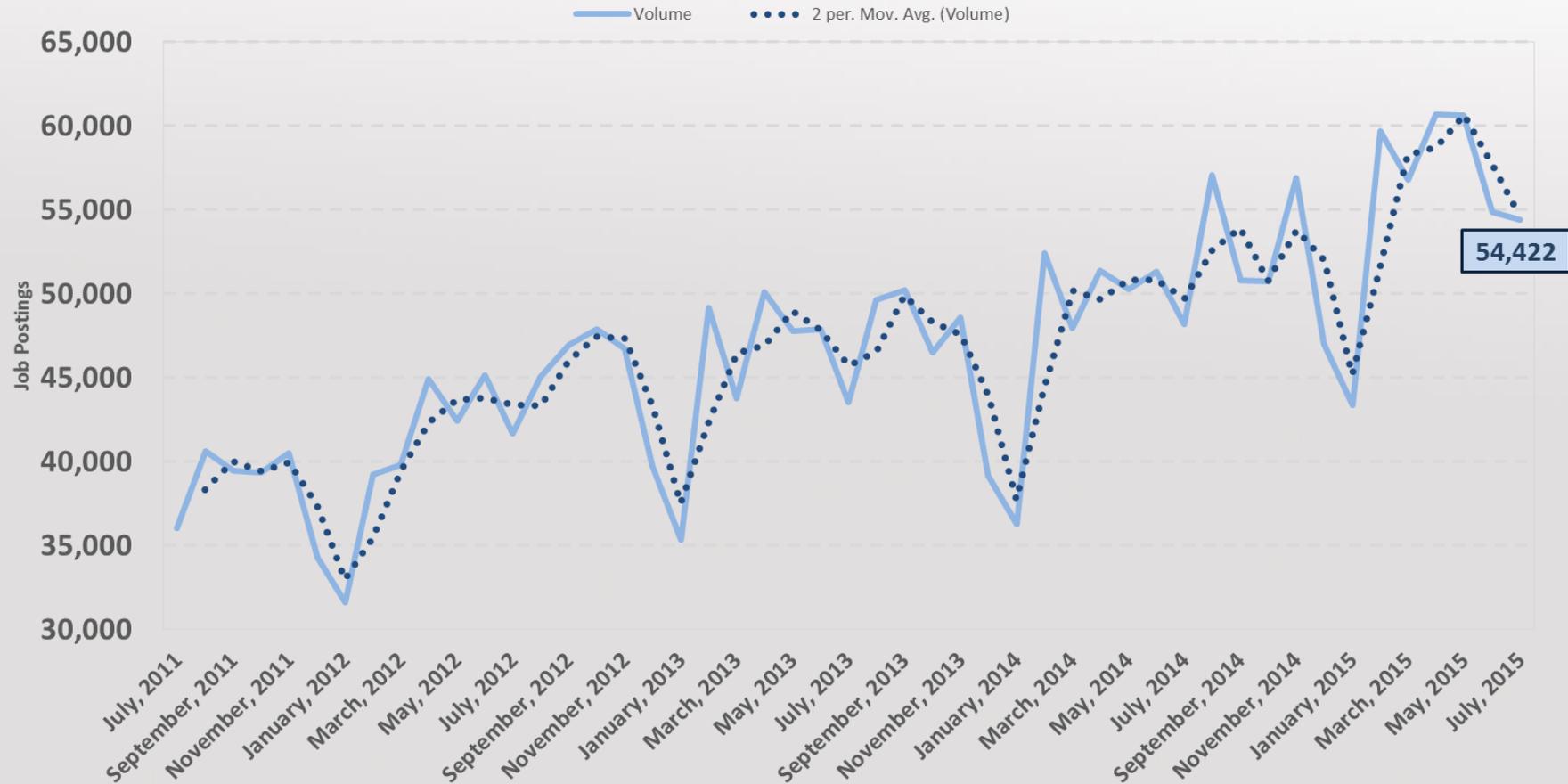
- **Job replacement vs. job creation**
- **Mismatch between ads and actual hiring**
- **Structural changes in hiring/job seeking practices**
  - **Increased internet access**
  - **Fluency and familiarity**
  - **Decrease in posting costs**
  - **Increase in job recruitment sites**
- **Methodological changes in the data series**

## Uses for HWOL Job Postings

- **A general indicator of hiring**
- **An indicator of specific employers looking to expand employment**
- **A resource to assess new and emerging occupations, and their skill/education requirements**

**“A single model is no substitute for judicious consideration of the various indicators”  
-Federal Reserve**

**Arizona Online Job Postings Volume**  
Not Seasonally Adjusted



Source: Conference Board Help Wanted Online

## Top Industry Groups and Employers; July 2015

### Employment Services

Ads: 2,452      Industry Code: 5613

### General Medical and Surgical Hospitals

Ads: 1,225      Industry Code: 6221

### Computer Systems Design and Related

Ads: 1,096      Industry Code: 5415

### Management, Scientific, and Technical Consulting

Ads: 732      Industry Code: 5416

### Depository Credit Intermediation

Ads: 662      Industry Code: 5221

### Unavailable

Ads: 36,301

### Banner Health

Ads: 1,015

### Aerotek

Ads: 586

### Wells Fargo

Ads: 428

### JewelOsco

Ads: 400

### Robert Half International

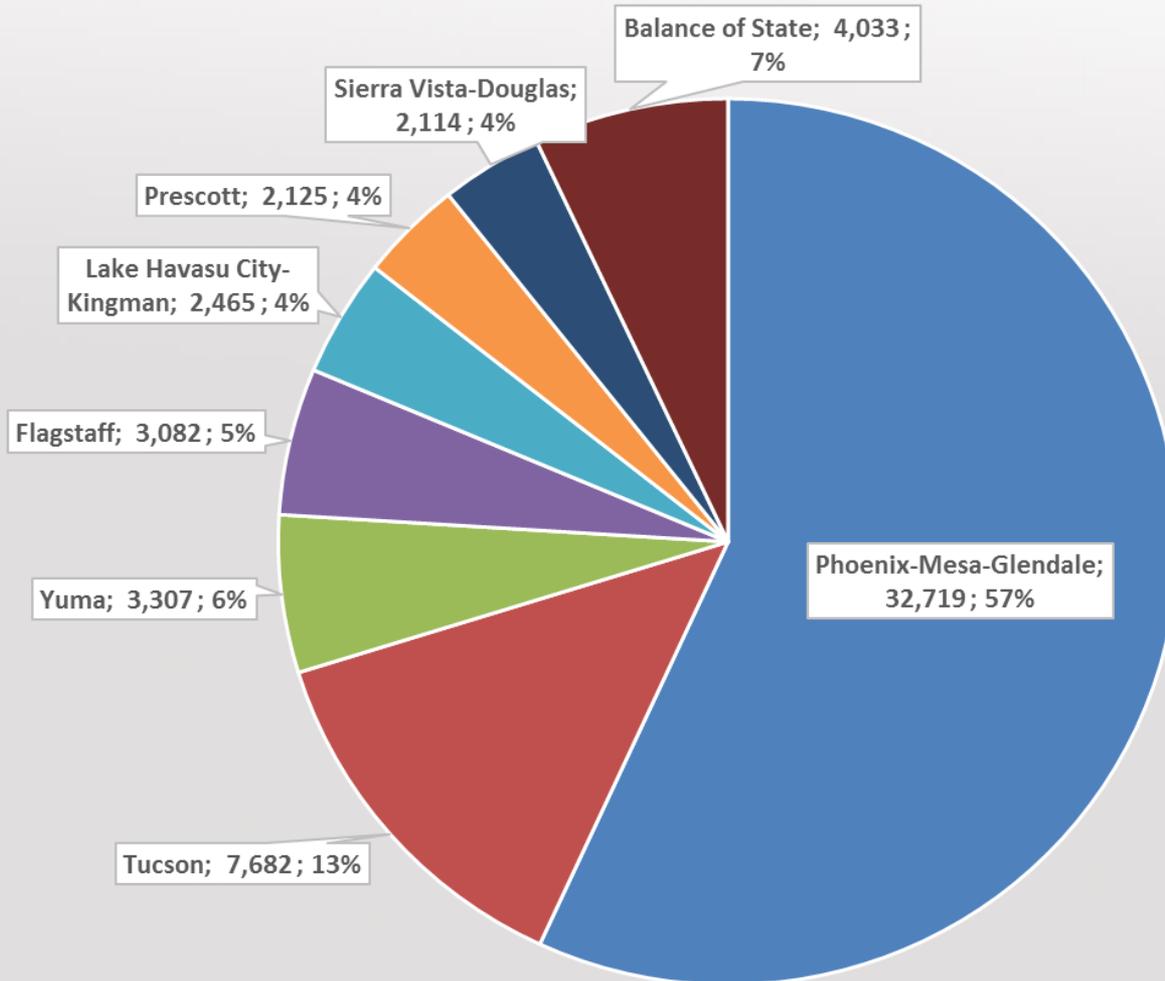
Ads: 397

### Unspecified

Ads: 29,788

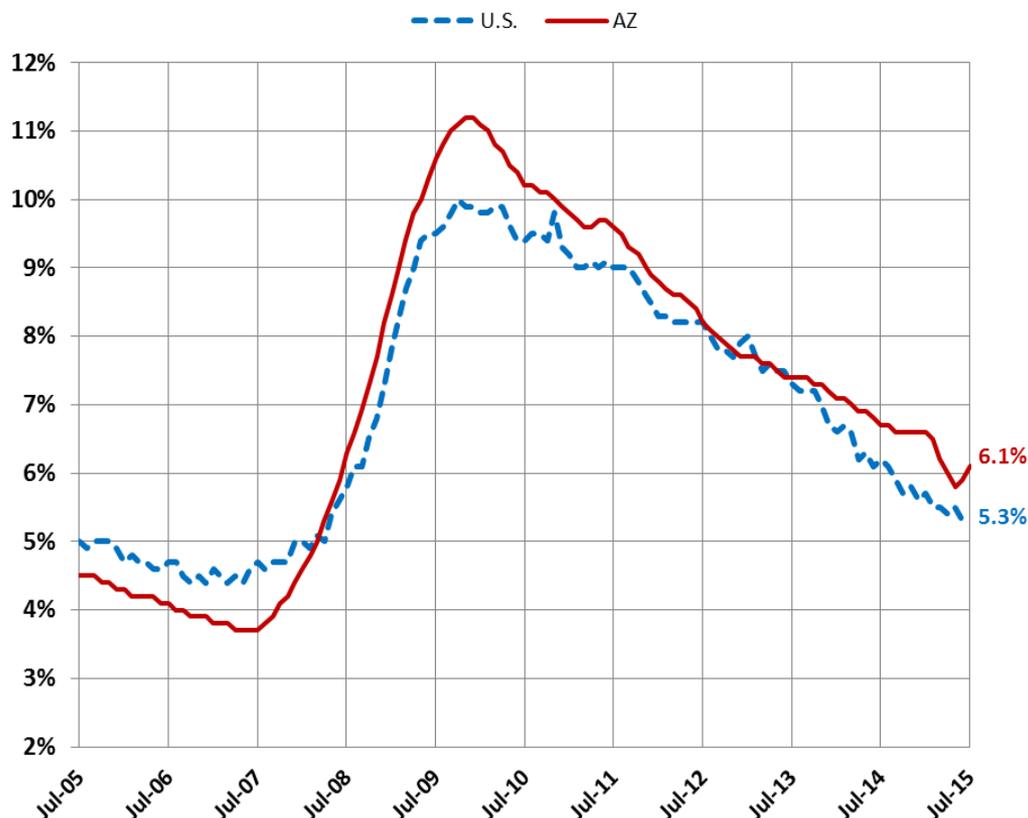
Source: Conference Board Help Wanted Online

Arizona Online Job Postings by MSA for July 2015  
Not Seasonally Adjusted



Source: Conference Board Help Wanted Online

## Arizona & U.S. Unemployment Rate Seasonally Adjusted



## LAUS - Seasonally Adjusted

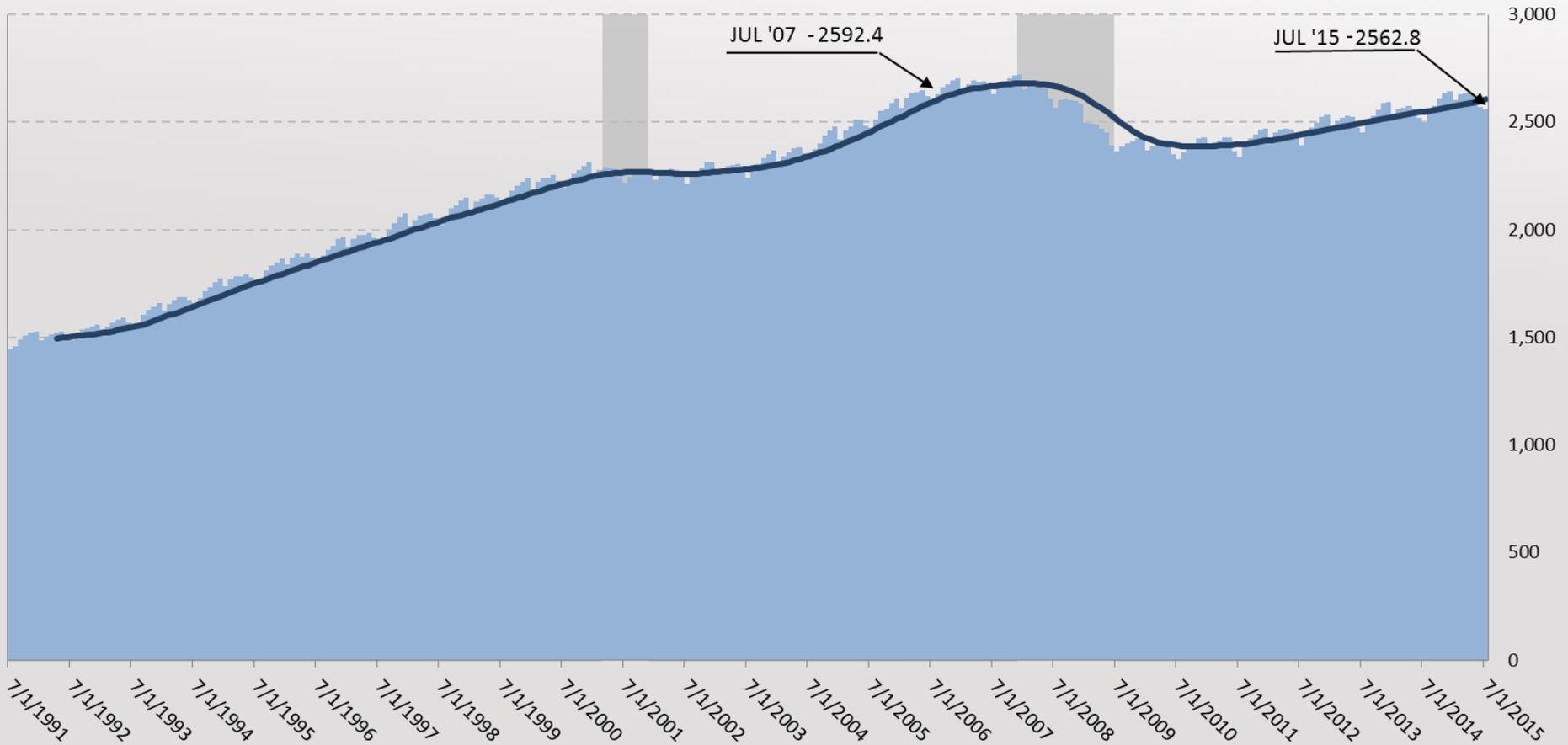
	Labor Force	Employment	Unemployment	
	Level	Level	Level	Rate
Jul	3,080,101	2,873,995	206,106	6.7
Aug	3,087,921	2,882,571	205,350	6.7
Sep	3,097,335	2,891,851	205,484	6.6
Oct	3,106,940	2,900,971	205,969	6.6
Nov	3,115,848	2,909,261	206,587	6.6
Dec	3,123,565	2,916,026	207,539	6.6
Jan	3,146,543	2,938,628	207,915	6.6
Feb	3,159,465	2,953,066	206,399	6.5
Mar	3,161,669	2,965,598	196,071	6.2
Apr	3,163,909	2,973,137	190,772	6.0
May	3,165,304	2,981,085	184,219	5.8
Jun	3,156,230	2,971,477	184,753	5.9
Jul	3,145,952	2,954,446	191,506	6.1
OTM Change	-10,278	-17,031	6,753	+0.2
OTY Change	+65,851	+80,451	-14,600	-0.6

Source: Local Area Unemployment Statistics

**AZ unemployment rate increased two-tenths of a percentage point**

## Arizona Total NonFarm Employment Level Seasonally Unadjusted

Recession
  Total Nonfarm Employment
  12 per. Mov. Avg. (Total Nonfarm Employment)

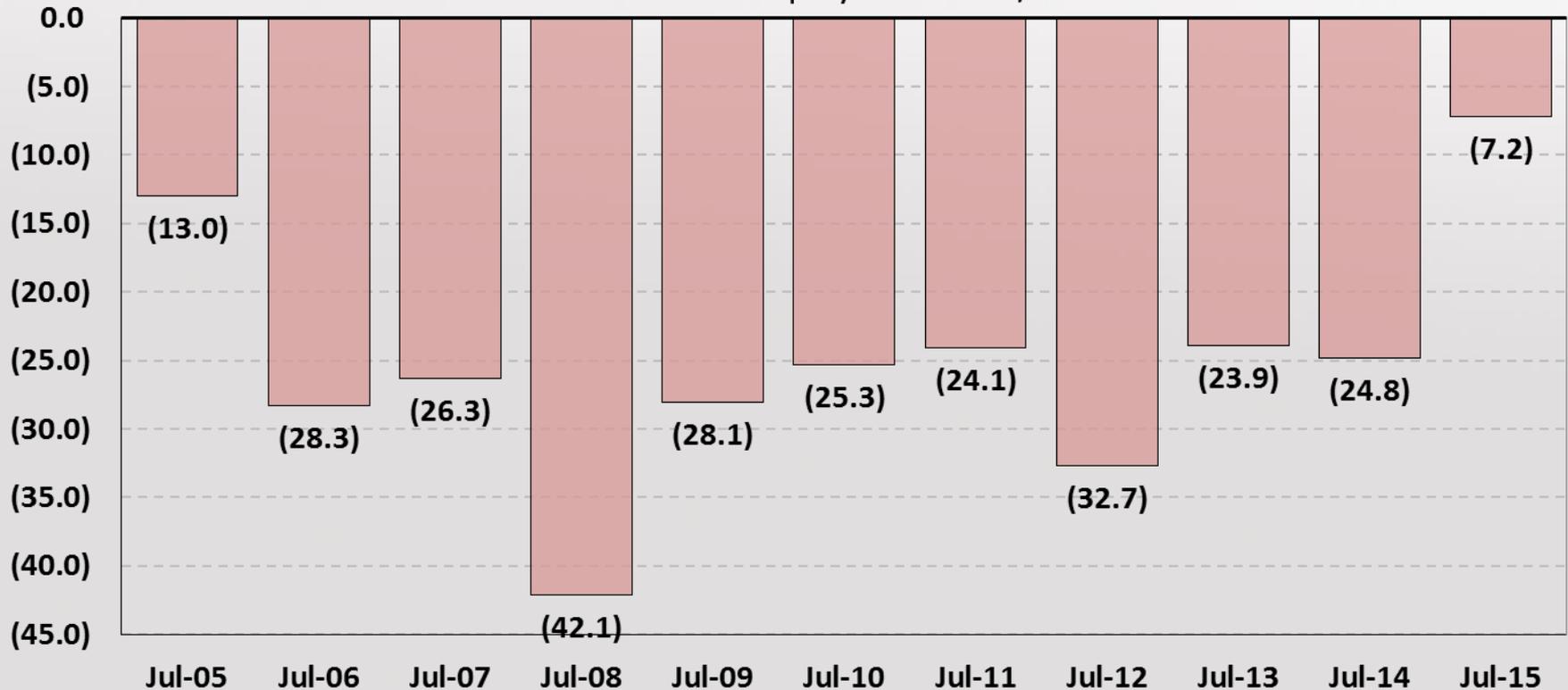


Source: Produced by the Arizona Office of Employment and Population Statistics in cooperation with the U.S. Dept. of Labor, Bureau of Labor Statistics

## Total Nonfarm Employment

### Over-The-Month Employment Gain/Loss

in thousands

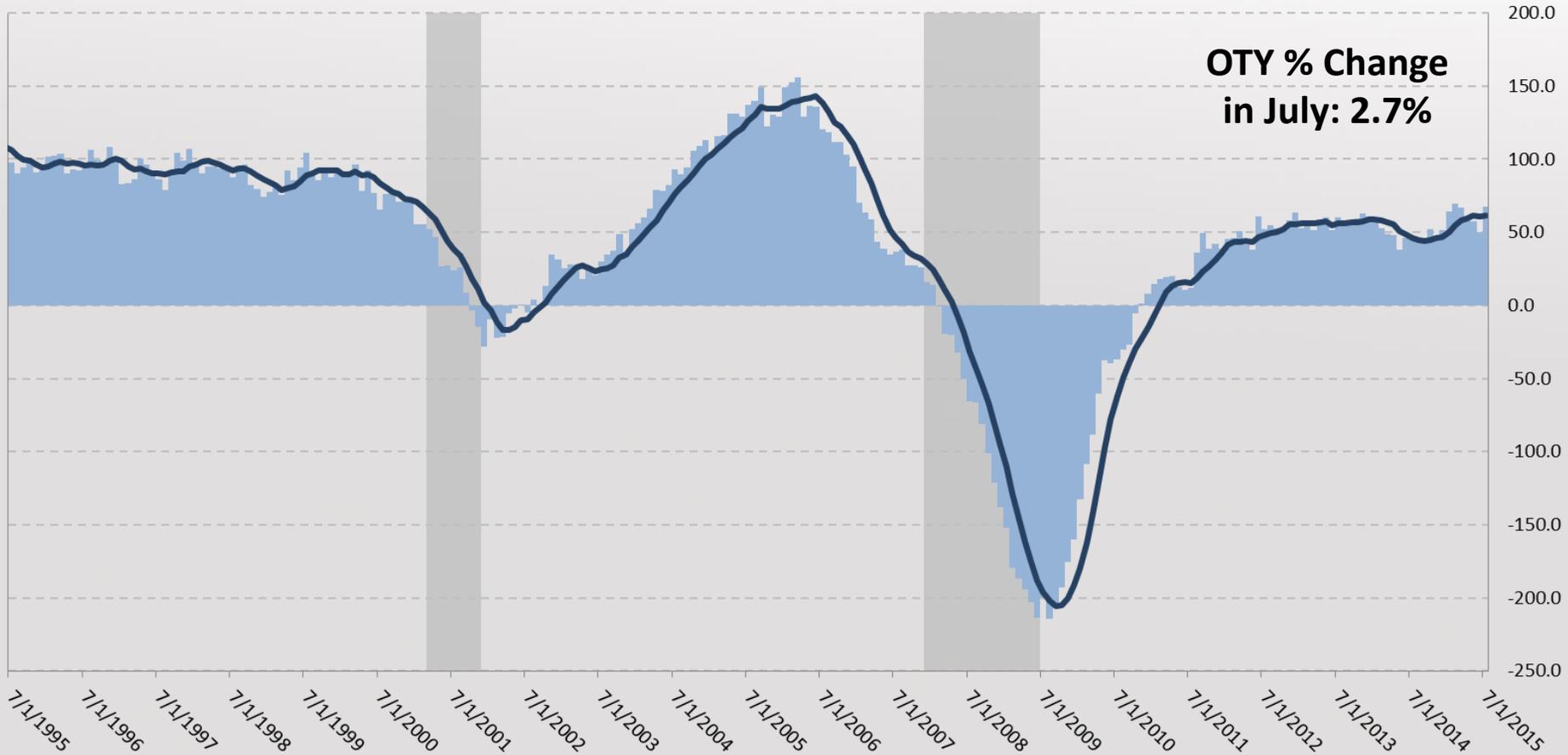


**Post-Recession Average ('10-'14): -26,200 Jobs or -1.1%**  
**Historic 10-Year Average ('05-'14): -26,900 Jobs or -1.1%**

## Arizona Total NonFarm Over-the-Year Employment Change

in thousands

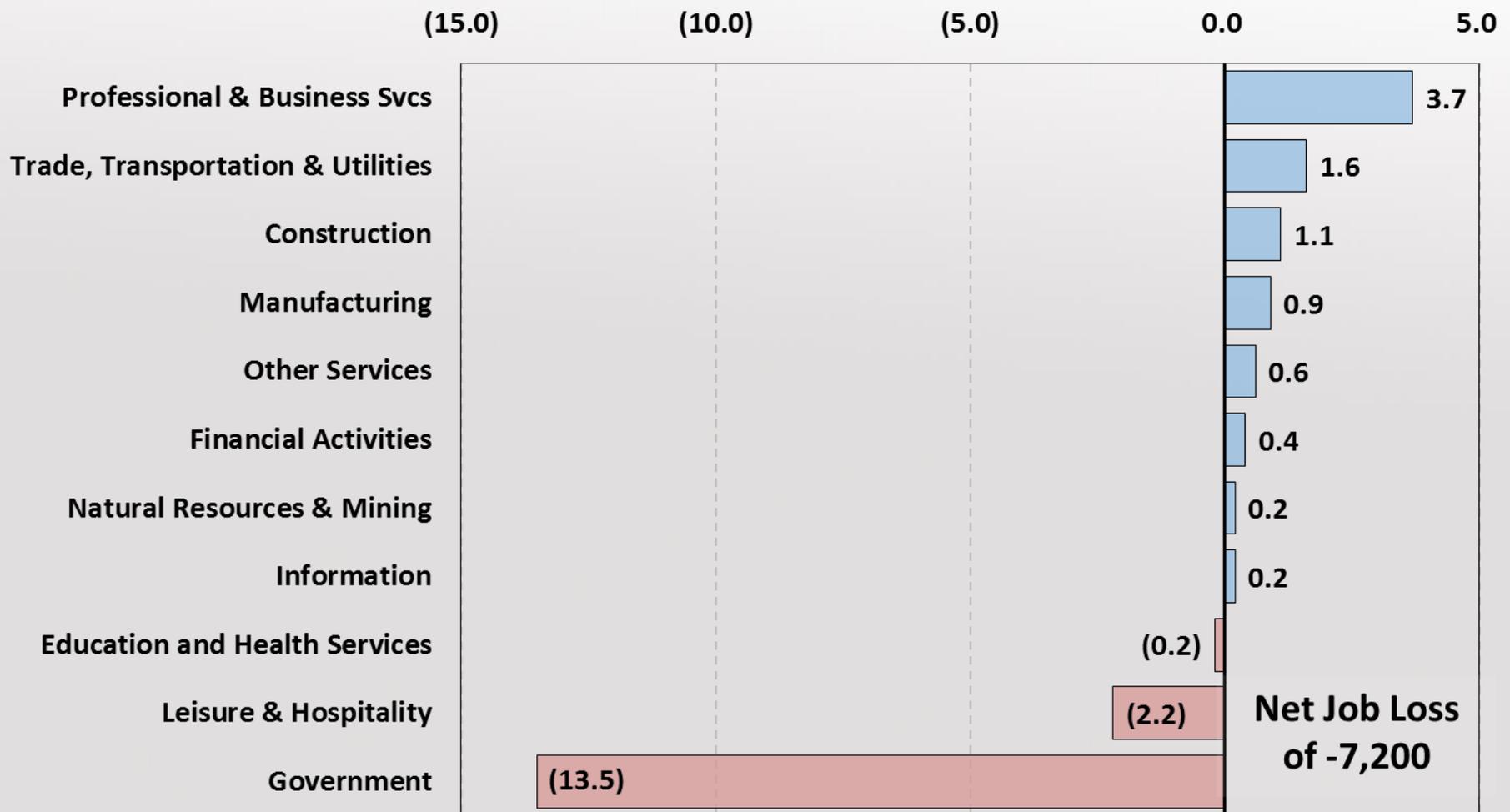
Recession
  Total Nonfarm Employment
  6 per. Mov. Avg. (Total Nonfarm Employment)



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

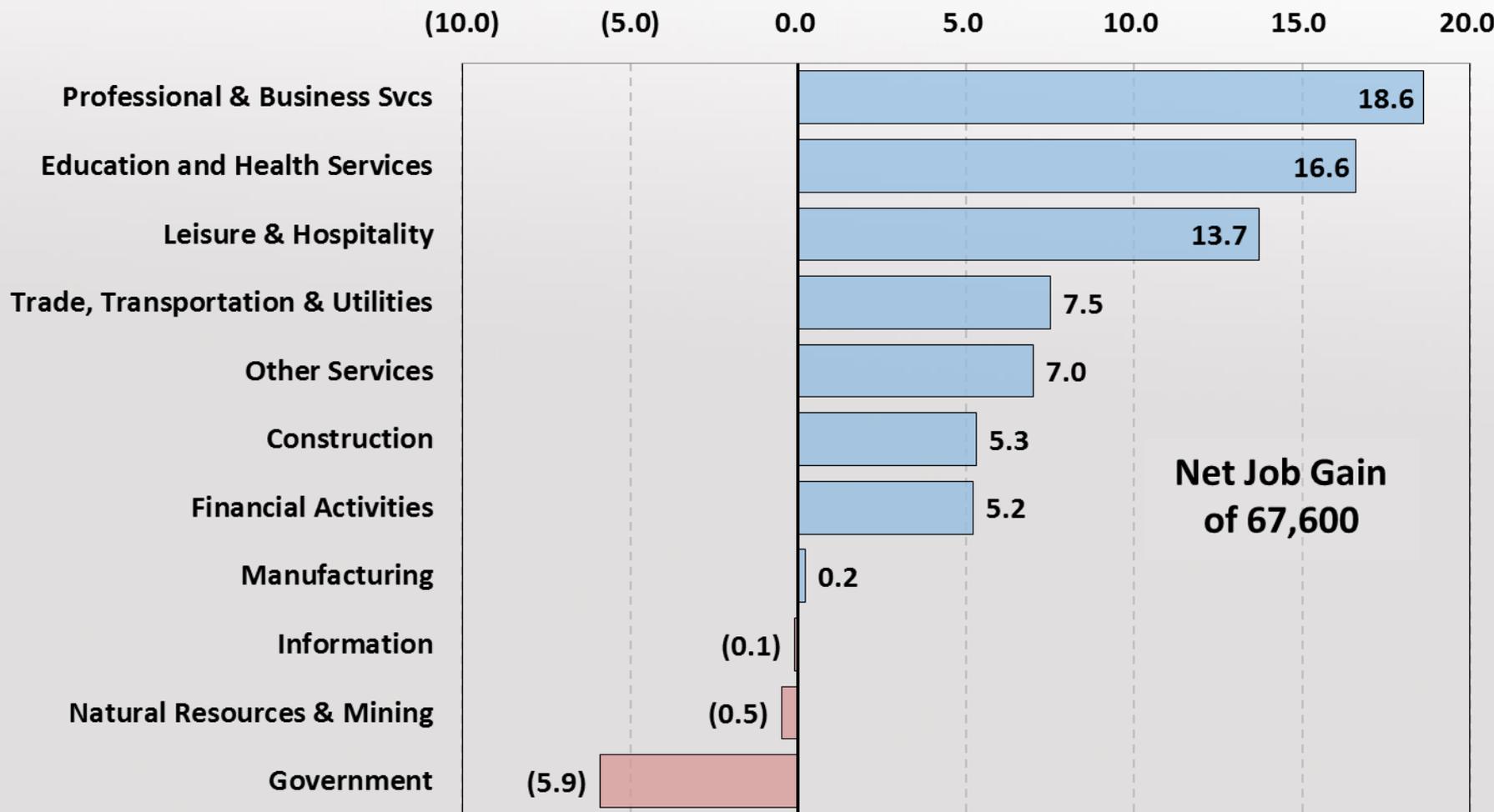
## Over-the-Month Job Gain/Loss by Sector

in thousands



## Over-the-Year Job Gain/Loss by Sector

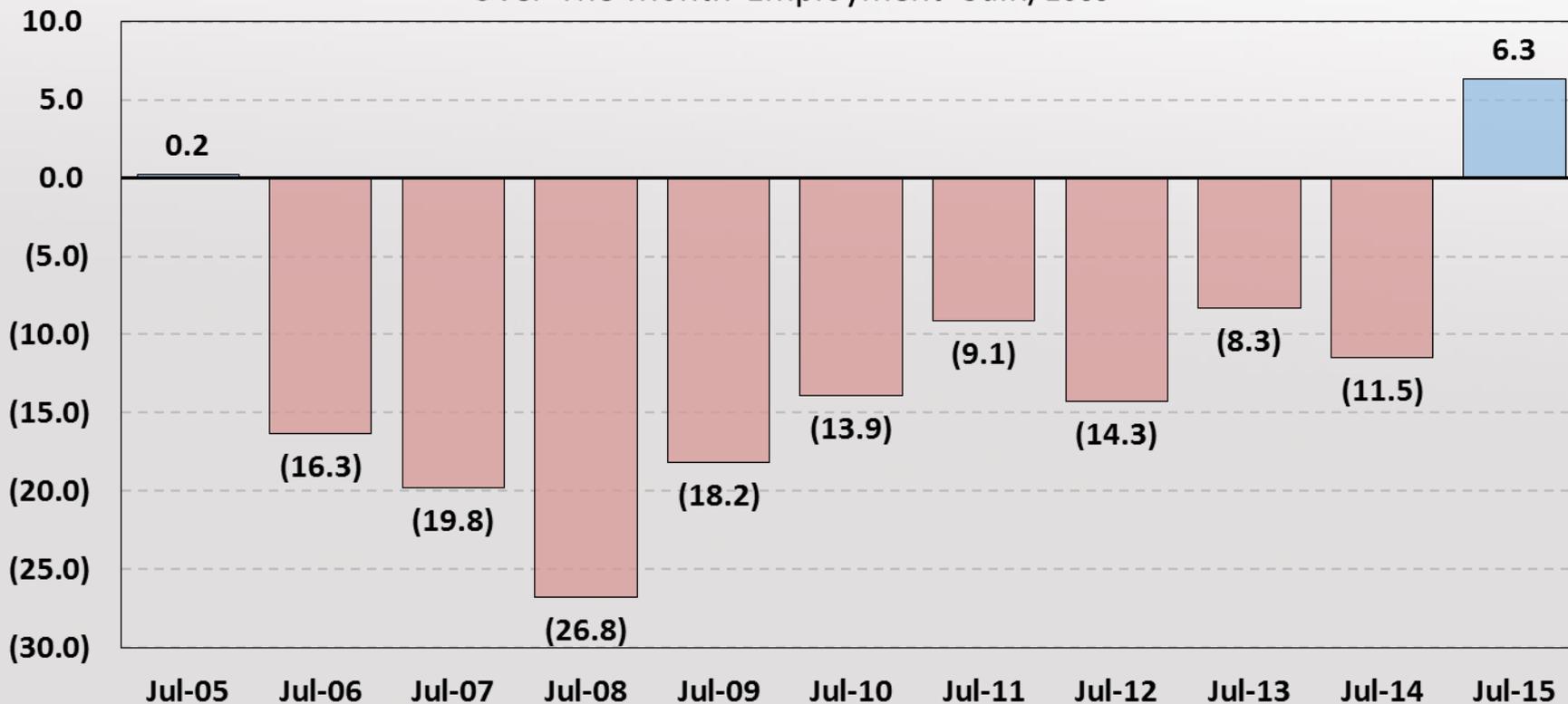
in thousands



## Private Sector

### Over-The-Month Employment Gain/Loss

in thousands

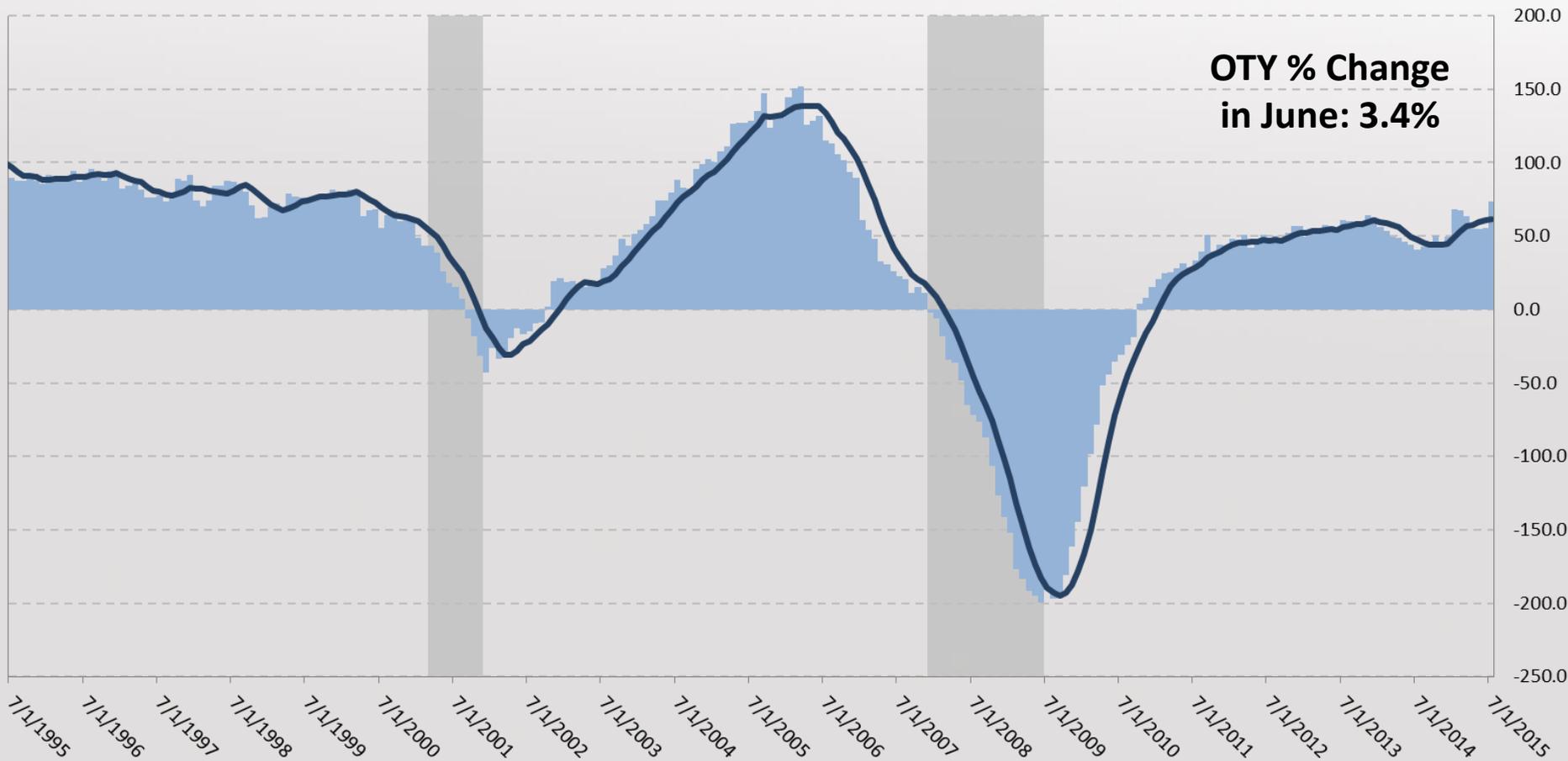


**Post-Recession Average ('10-'14): -11,400 Jobs or -0.6%**  
**Historic 10-Year Average ('05-'14): -13,800 Jobs or -0.7%**

## Arizona Private Sector Over-the-Year Employment Change

in thousands

Recession Private Sector 6 per. Mov. Avg. (Private Sector)

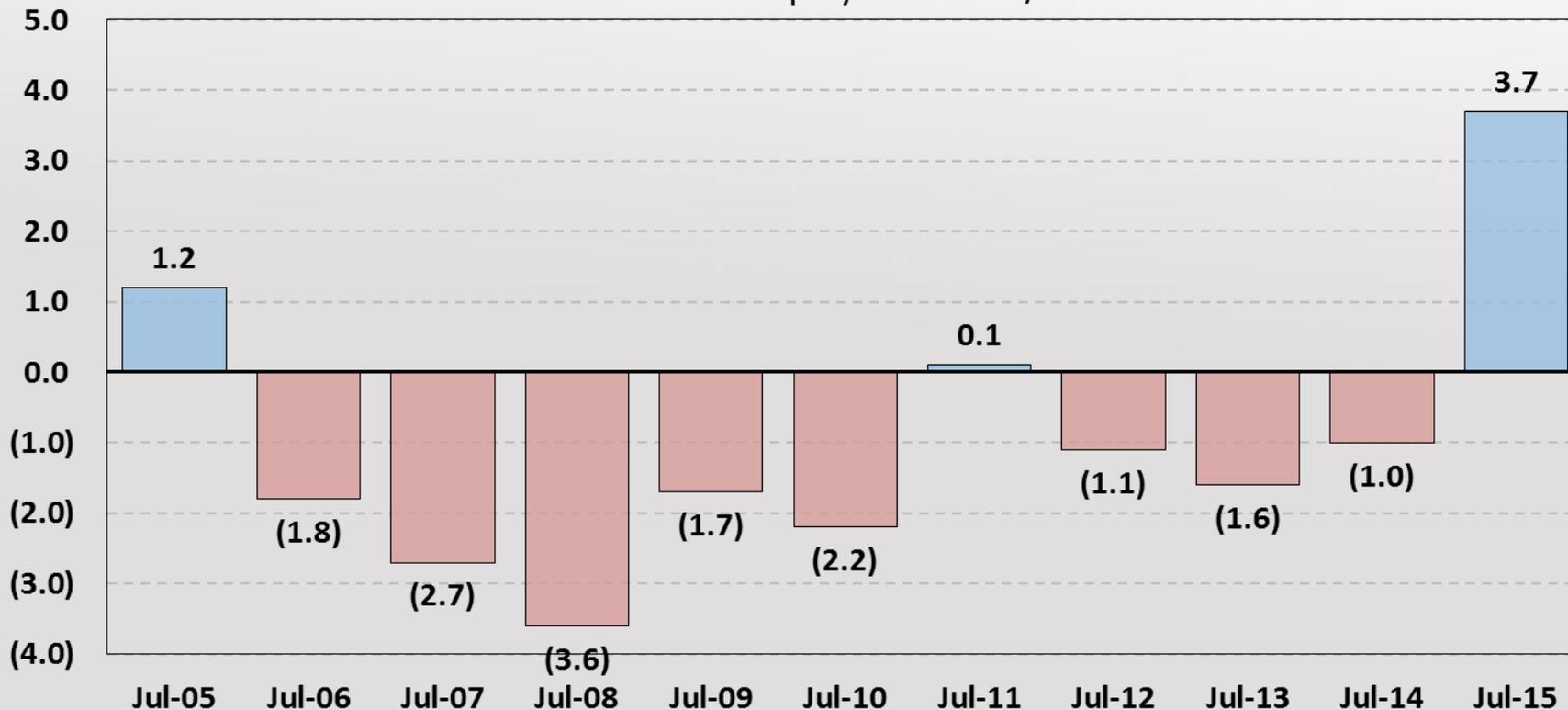


Source: Produced by the Arizona Office of Employment and Population Statistics in cooperation with the U.S. Dept. of Labor, Bureau of Labor Statistics

## Professional & Business Svcs

### Over-The-Month Employment Gain/Loss

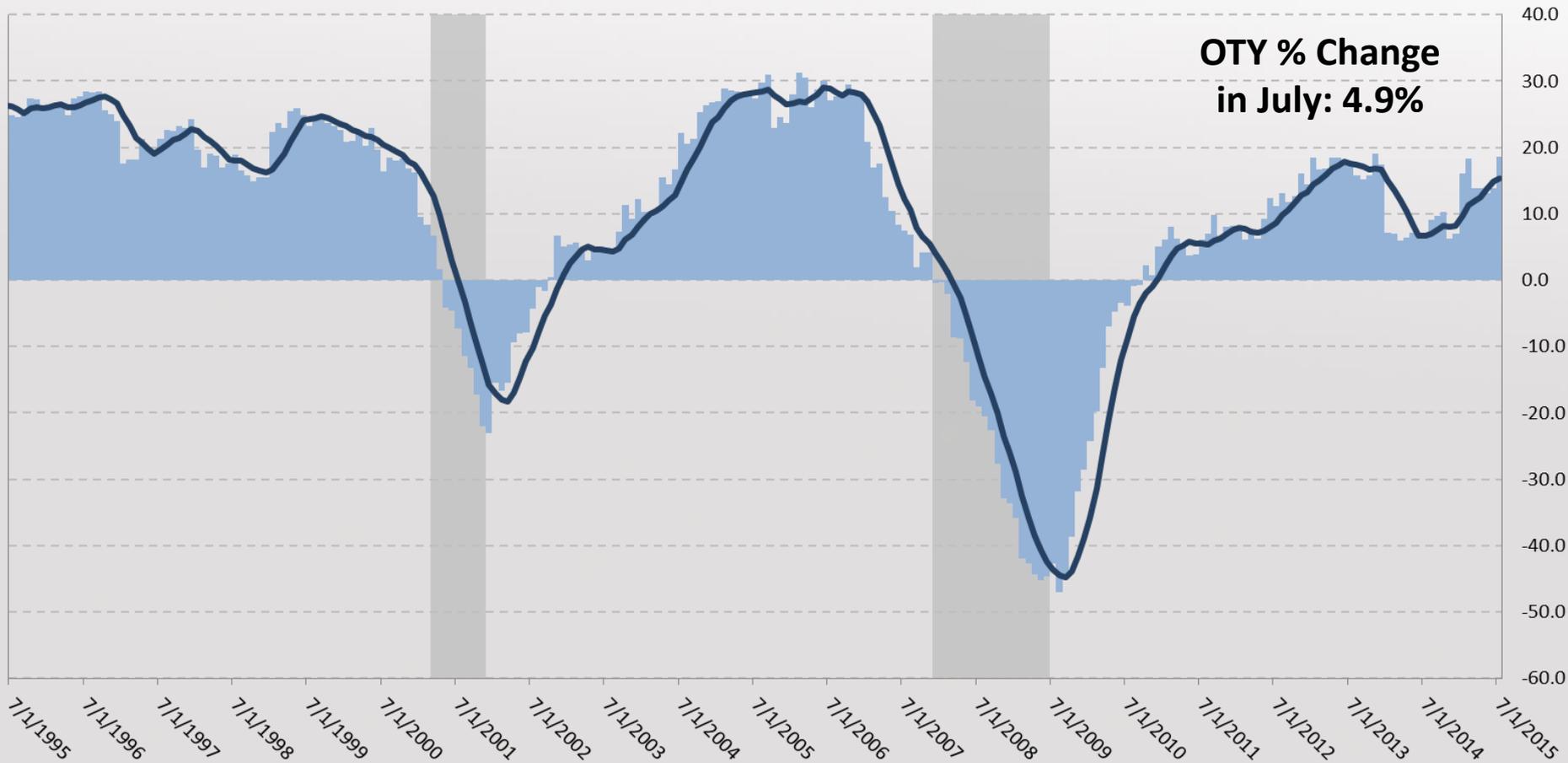
in thousands



**Post-Recession Average ('10-'14): -1,200 Jobs or -0.3%**  
**Historic 10-Year Average ('05-'14): -1,400 Jobs or -0.4%**

## Arizona Professional & Business Svcs Over-the-Year Employment Change

Recession
  Professional & Business Svcs
  6 per. Mov. Avg. (Professional & Business Svcs)
 in thousands

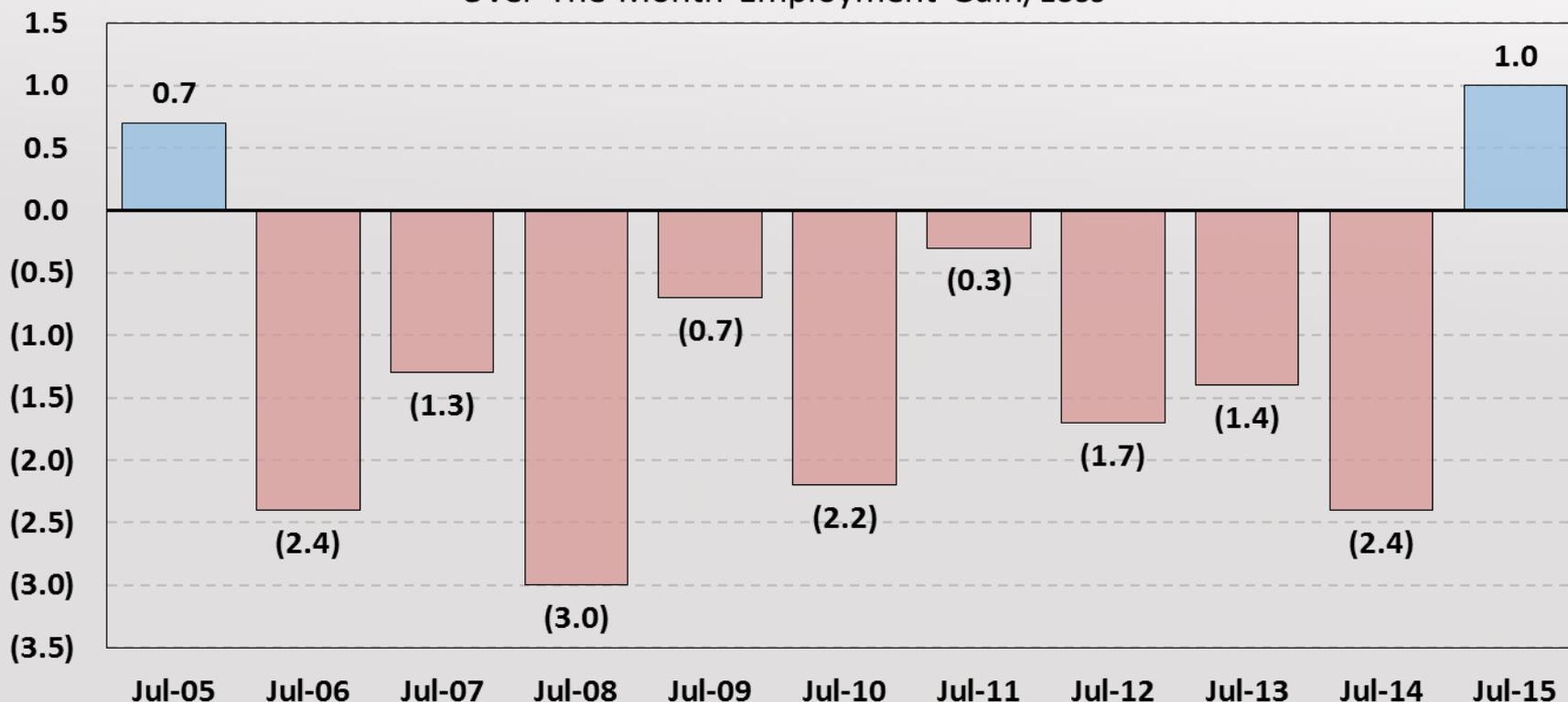


Source: Produced by the Arizona Office of Employment and Population Statistics in cooperation with the U.S. Dept. of Labor, Bureau of Labor Statistics

# Within Professional and Business Services Employment Services

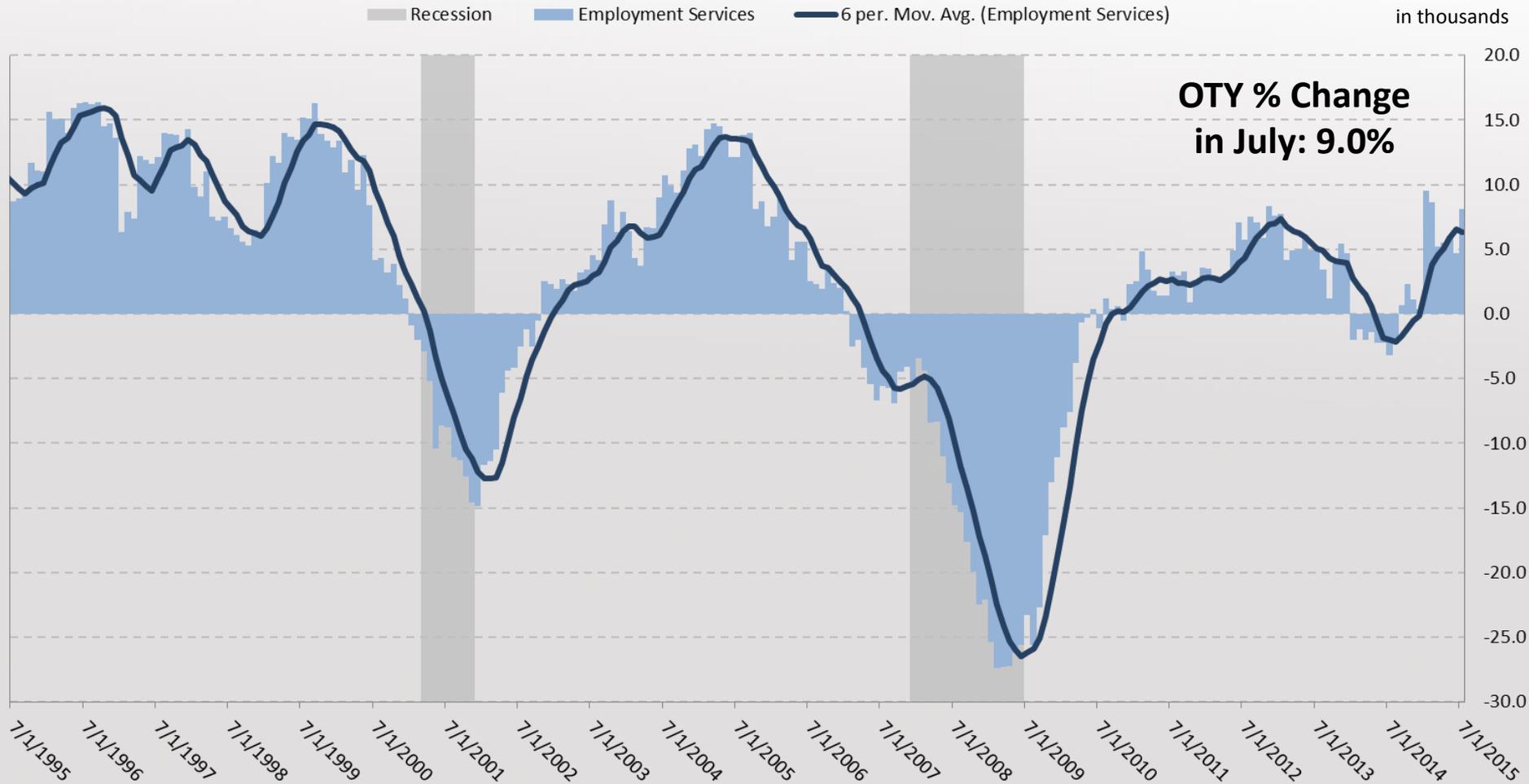
Over-The-Month Employment Gain/Loss

in thousands



**Post-Recession Average ('10-'14): -1,600 Jobs or -1.8%**  
**Historic 10-Year Average ('05-'14): -1,500 Jobs or -1.5%**

## Arizona Employment Svcs Over-the-Year Employment Change

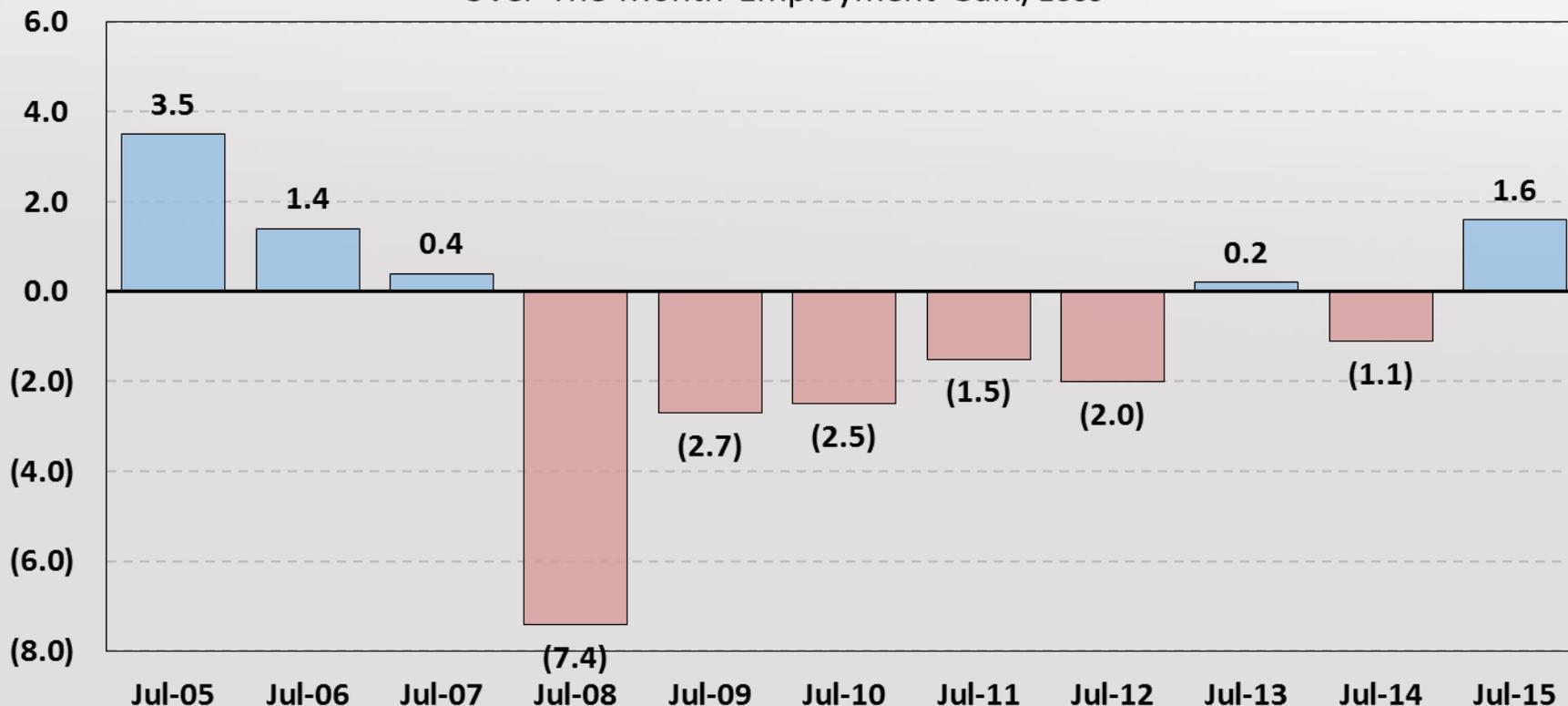


Source: Produced by the Arizona Office of Employment and Population Statistics in cooperation with the U.S. Dept. of Labor, Bureau of Labor Statistics

## Trade, Transportation & Utilities

### Over-The-Month Employment Gain/Loss

in thousands

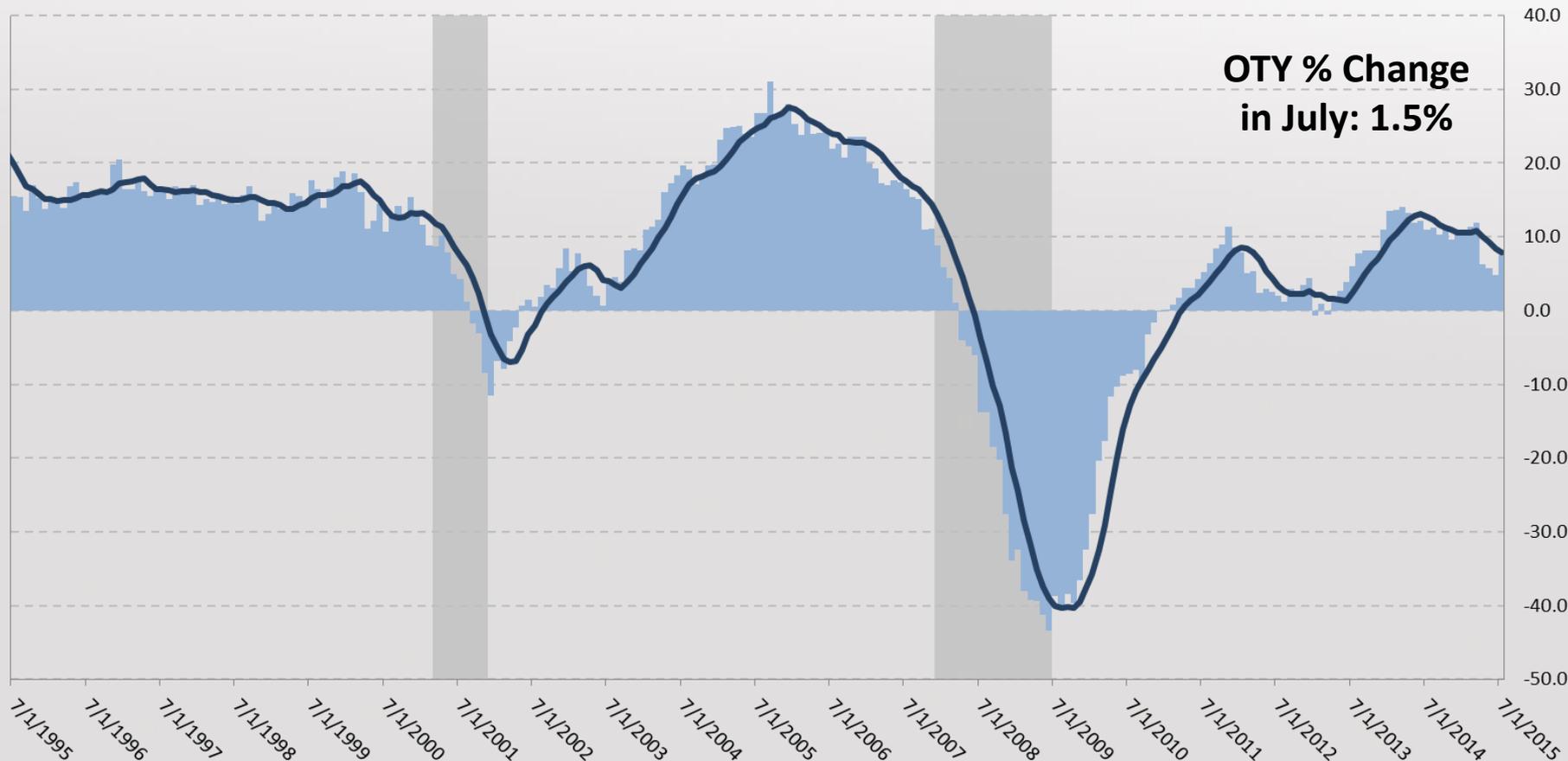


**Post-Recession Average ('10-'14): -1,400 Jobs or -0.3%**  
**Historic 10-Year Average ('05-'14): -1,200 Jobs or -0.2%**

## Arizona Trade, Transp. & Utilities Over-the-Year Employment Change

in thousands

Recession
  Trade, Transportation & Utilities
  6 per. Mov. Avg. (Trade, Transportation & Utilities)



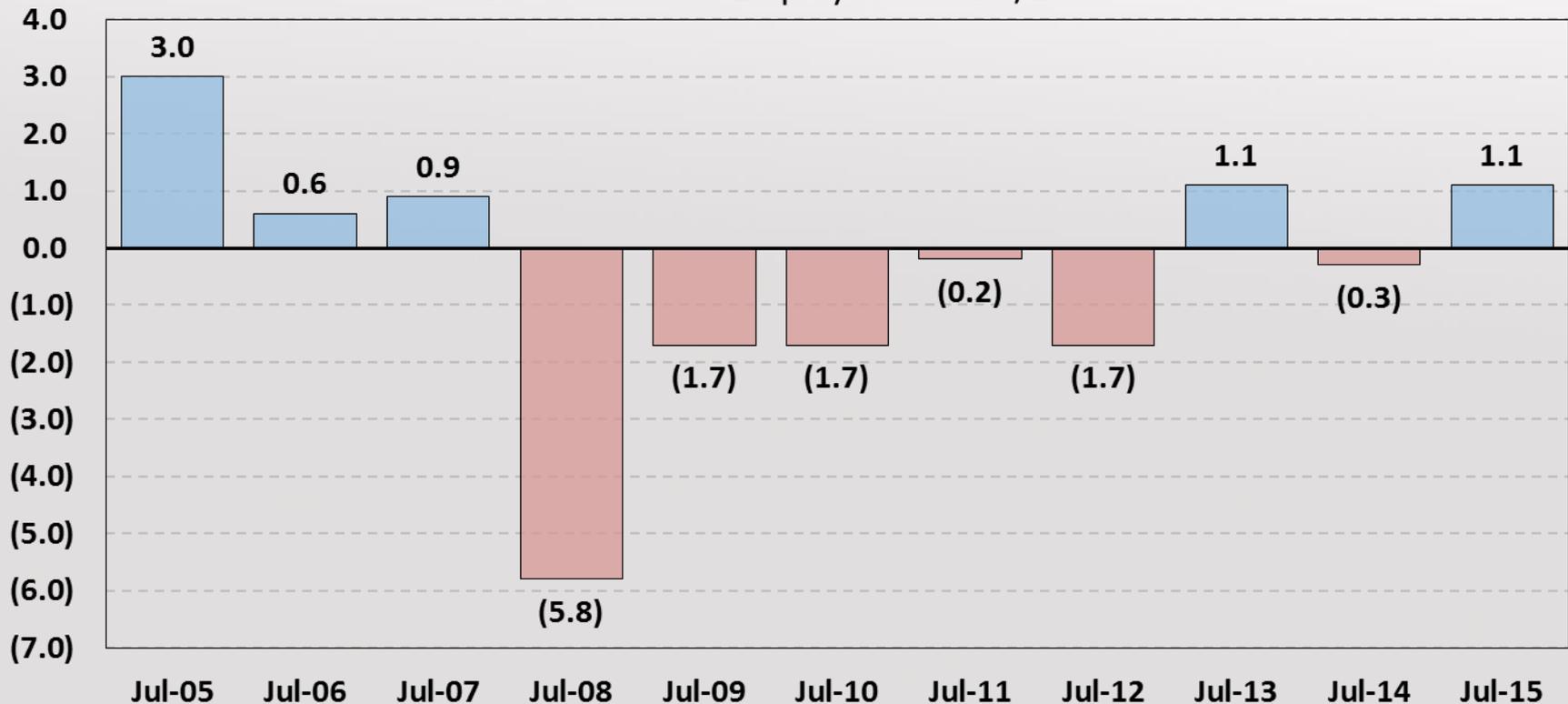
Source: Produced by the Arizona Office of Employment and Population Statistics in cooperation with the U.S. Dept. of Labor, Bureau of Labor Statistics

# Within Trade, Transp. & Utilities

## Retail Trade

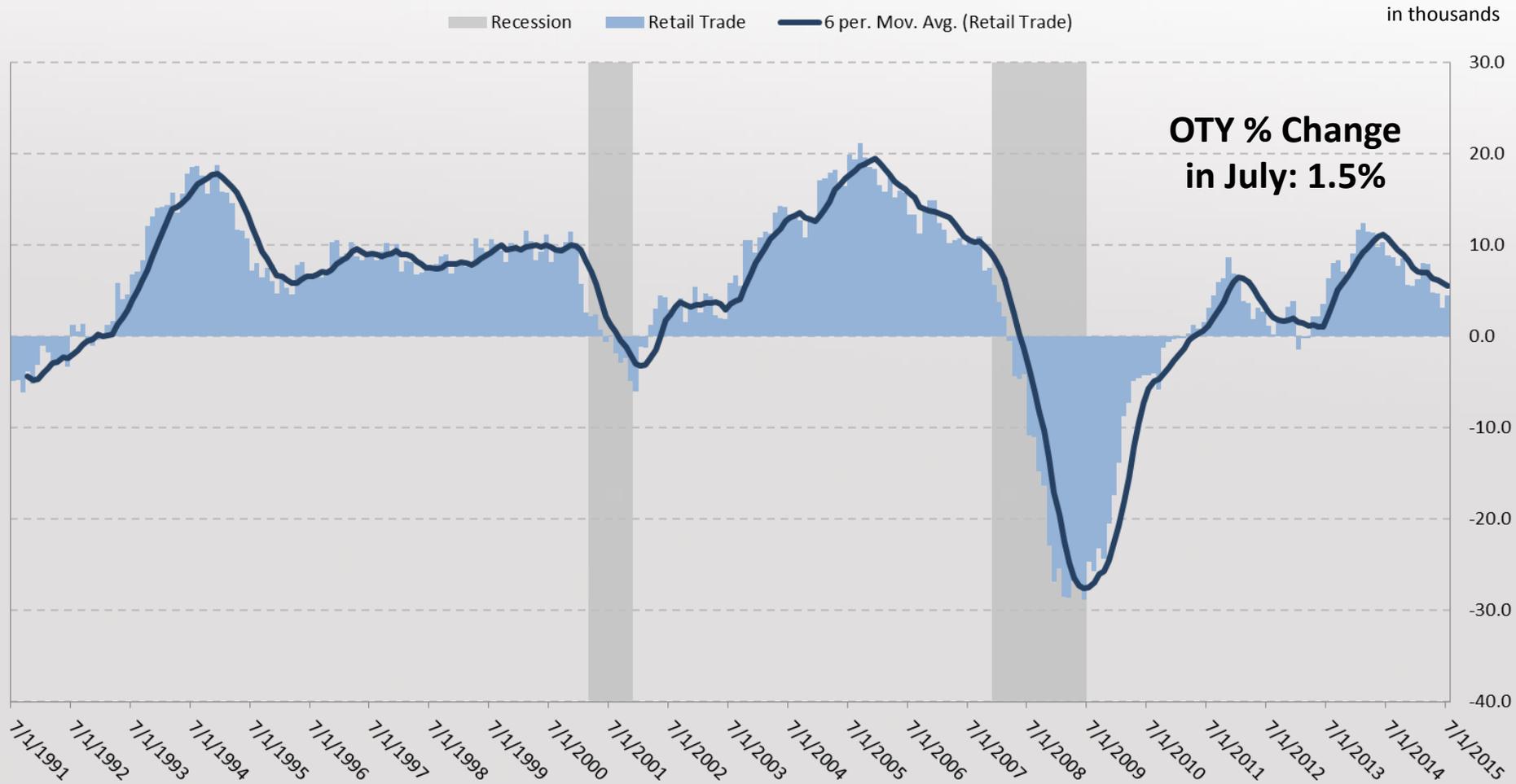
Over-The-Month Employment Gain/Loss

in thousands



Post-Recession Average ('10-'14): -600 Jobs or -0.2%  
 Historic 10-Year Average ('05-'14): -600 Jobs or -0.2%

## Arizona Retail Trade Over-the-Year Employment Change

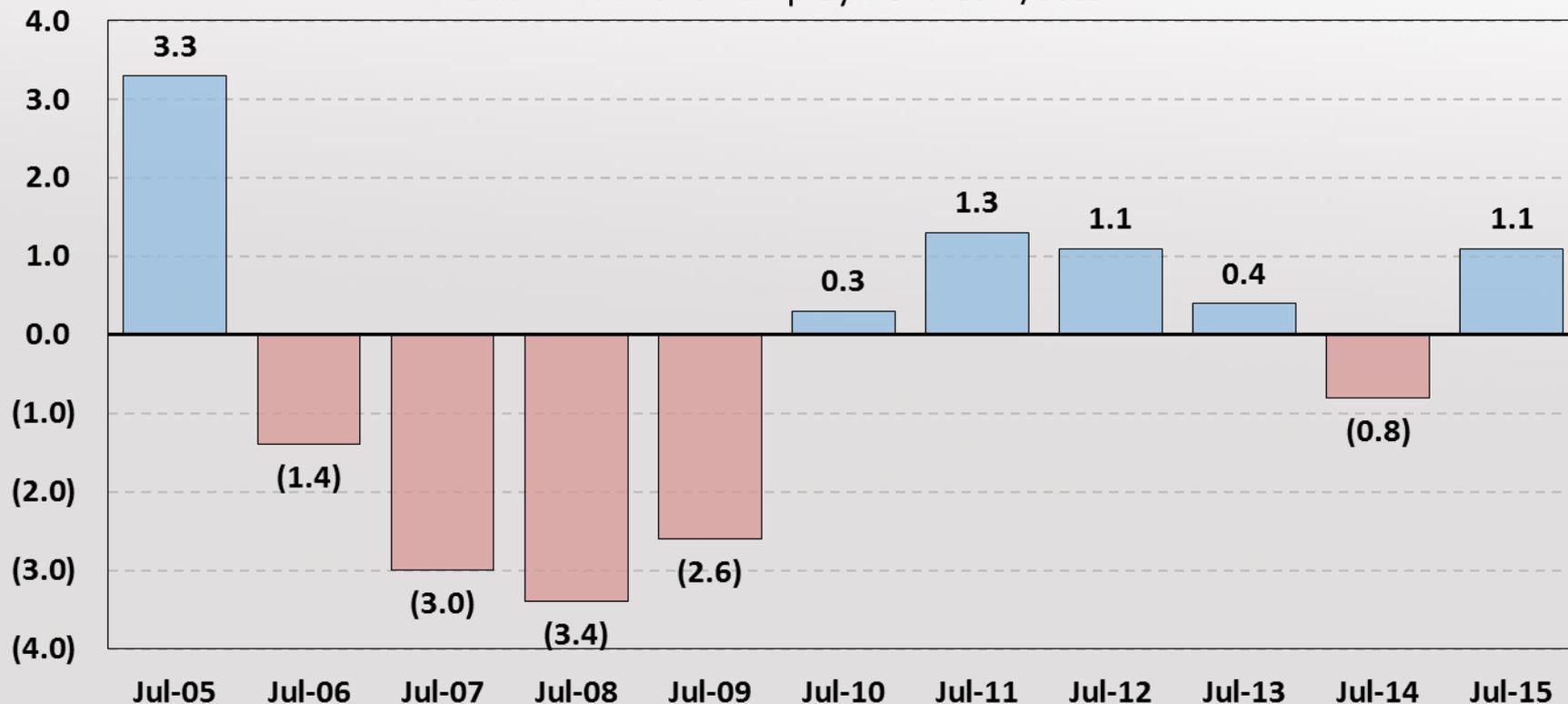


Source: Produced by the Arizona Office of Employment and Population Statistics in cooperation with the U.S. Dept. of Labor, Bureau of Labor Statistics

## Construction

### Over-The-Month Employment Gain/Loss

in thousands

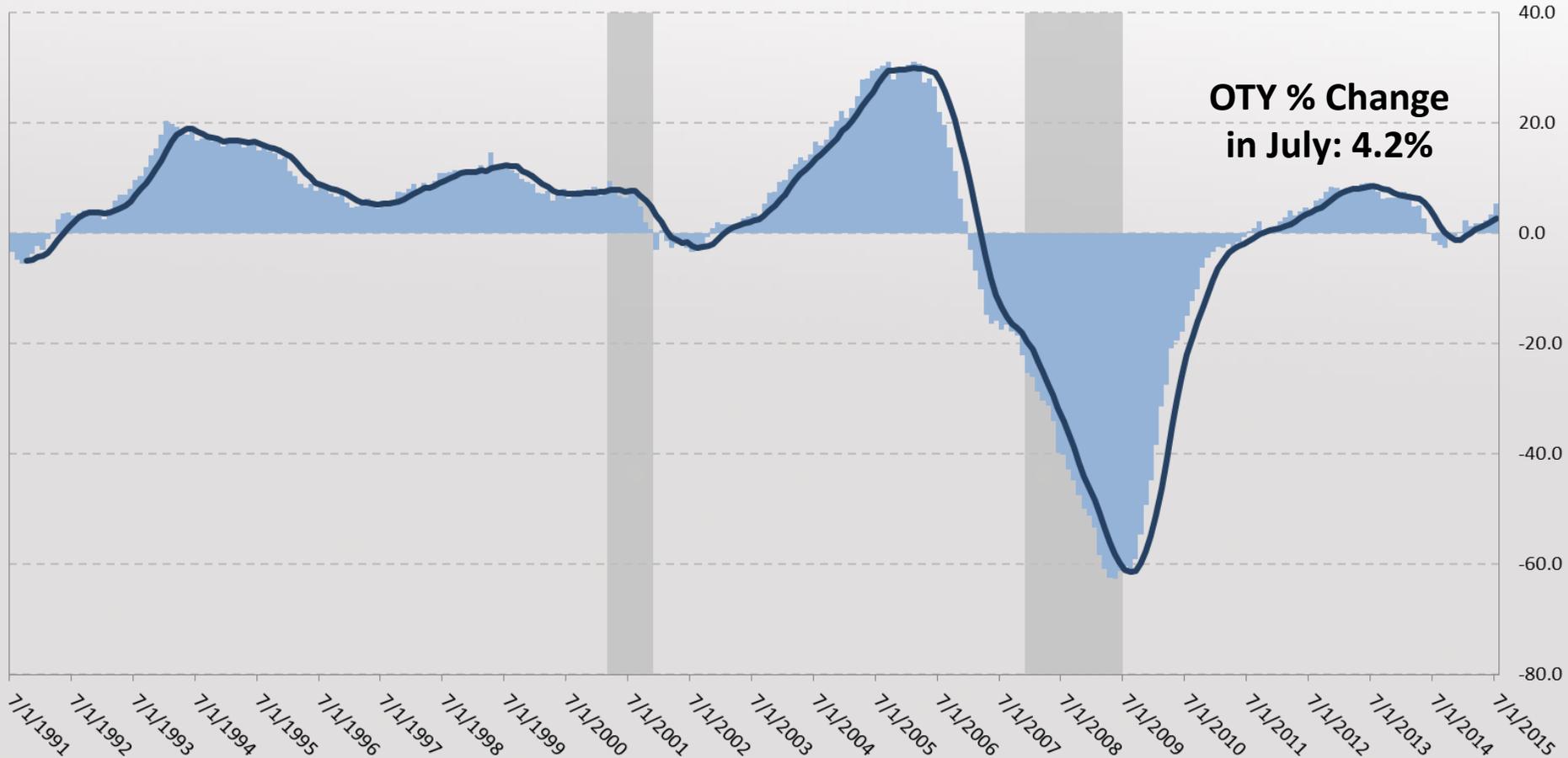


**Post-Recession Average ('10-'14): 500 Jobs or 0.4%**  
**Historic 10-Year Average ('05-'14): -500 Jobs or -0.2%**

## Arizona Construction Over-the-Year Employment Change

Recession Construction 6 per. Mov. Avg. (Construction)

in thousands

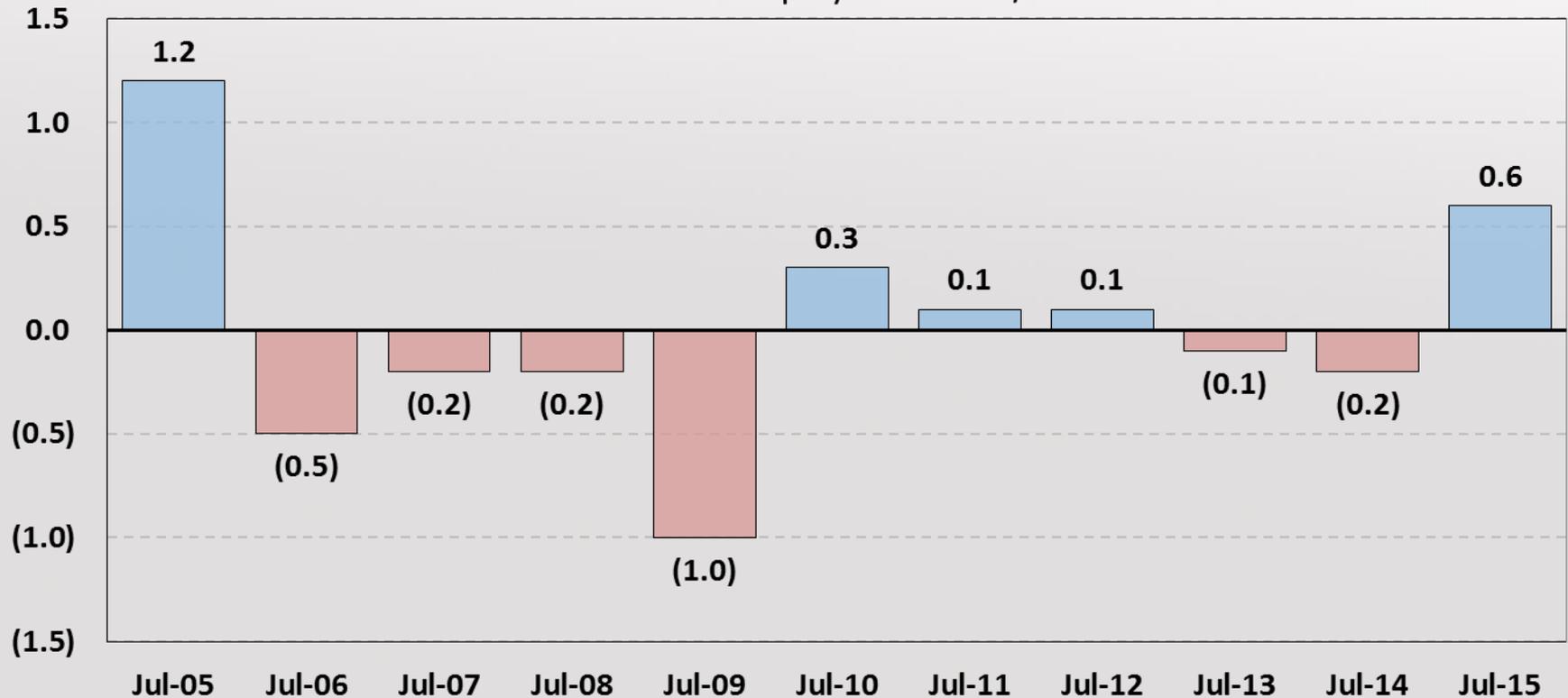


Source: Produced by the Arizona Office of Employment and Population Statistics in cooperation with the U.S. Dept. of Labor, Bureau of Labor Statistics

## Within Construction Construction of Buildings

Over-The-Month Employment Gain/Loss

in thousands

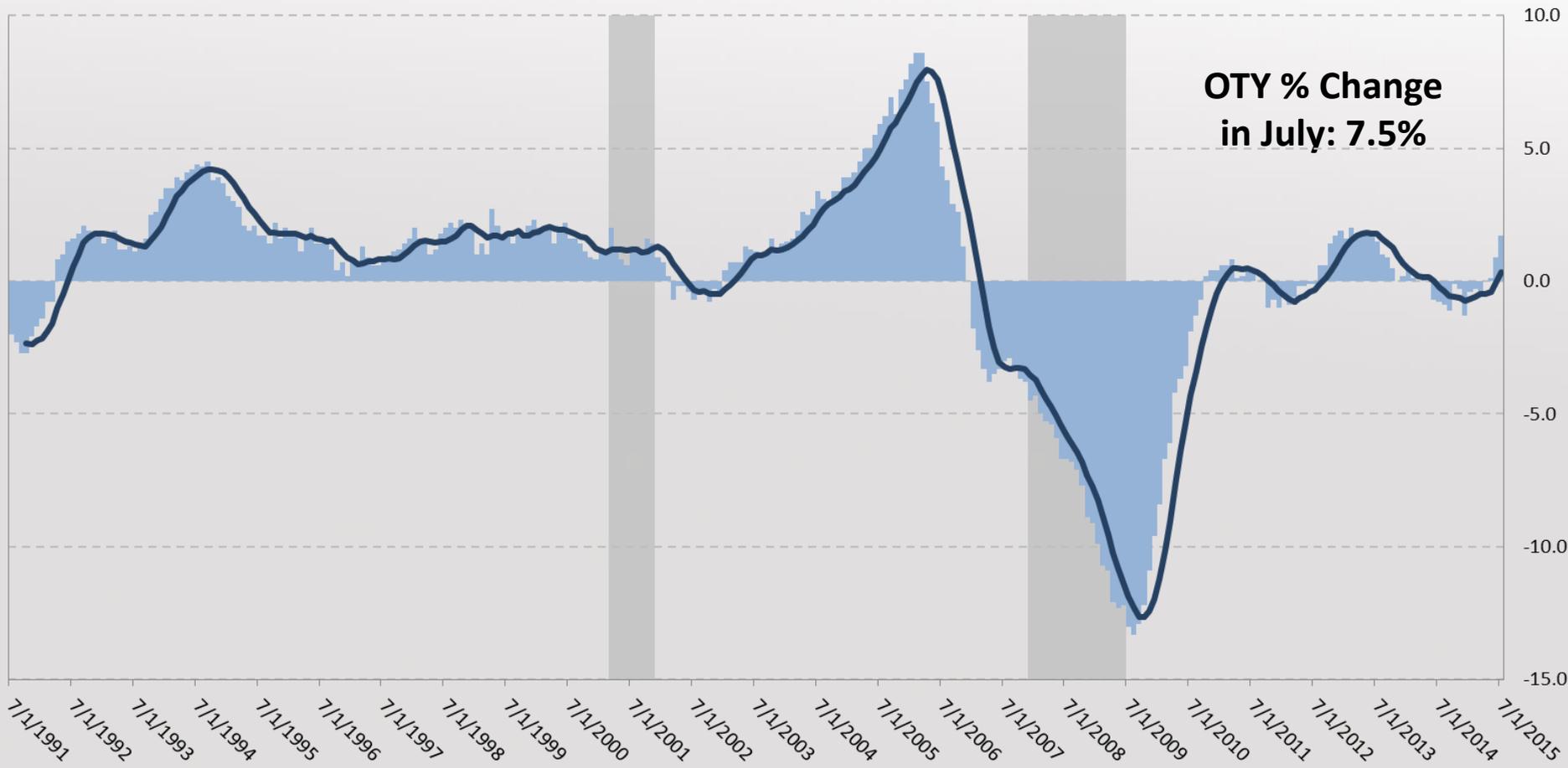


**Post-Recession Average ('10-'14): 0 Jobs or 0.2%**  
**Historic 10-Year Average ('05-'14): -100 Jobs or -0.2%**

## Arizona Building Construction Over-the-Year Employment Change

Recession
  Construction of Buildings
  6 per. Mov. Avg. (Construction of Buildings)

in thousands



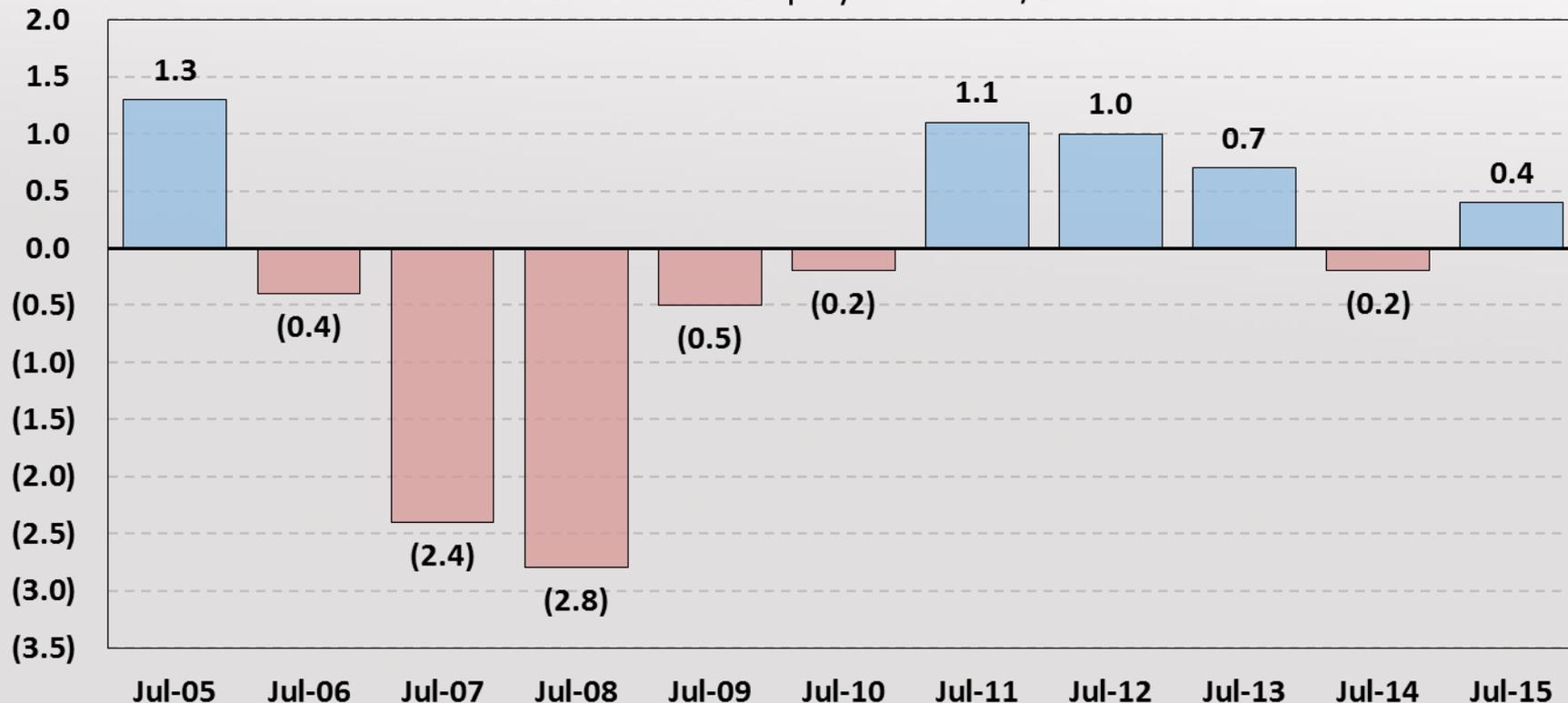
Source: Produced by the Arizona Office of Employment and Population Statistics in cooperation with the U.S. Dept. of Labor, Bureau of Labor Statistics

# Within Construction

## Specialty Trades Construction Contractors

Over-The-Month Employment Gain/Loss

in thousands

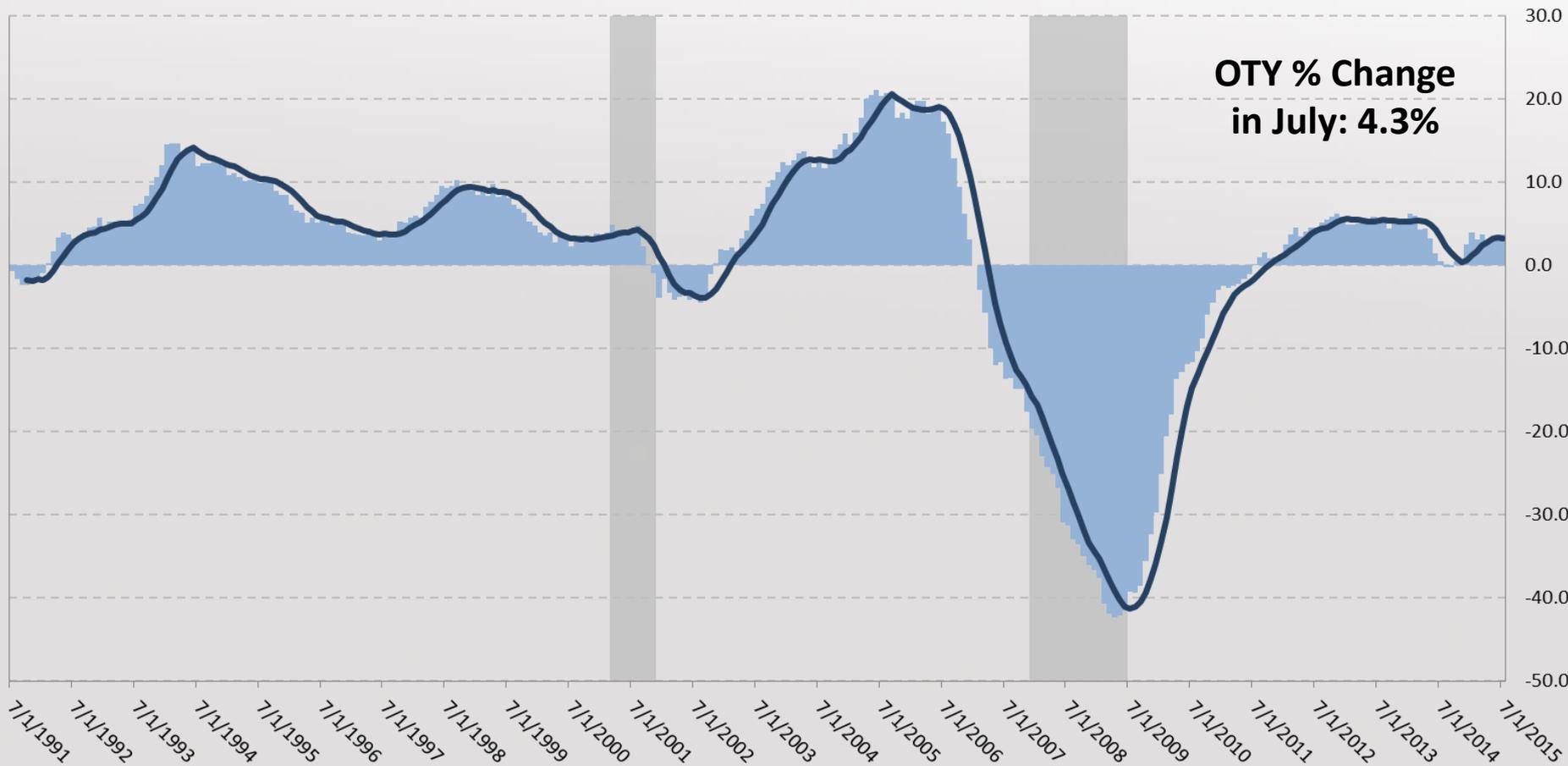


Post-Recession Average ('10-'14): 500 Jobs or 0.6%  
 Historic 10-Year Average ('05-'14): -200 Jobs or -0.1%

## Arizona Specialty Trades Over-the-Year Employment Change

Recession
  Specialty Trades Construction Contractors
  6 per. Mov. Avg. (Specialty Trades Construction Contractors)

in thousands

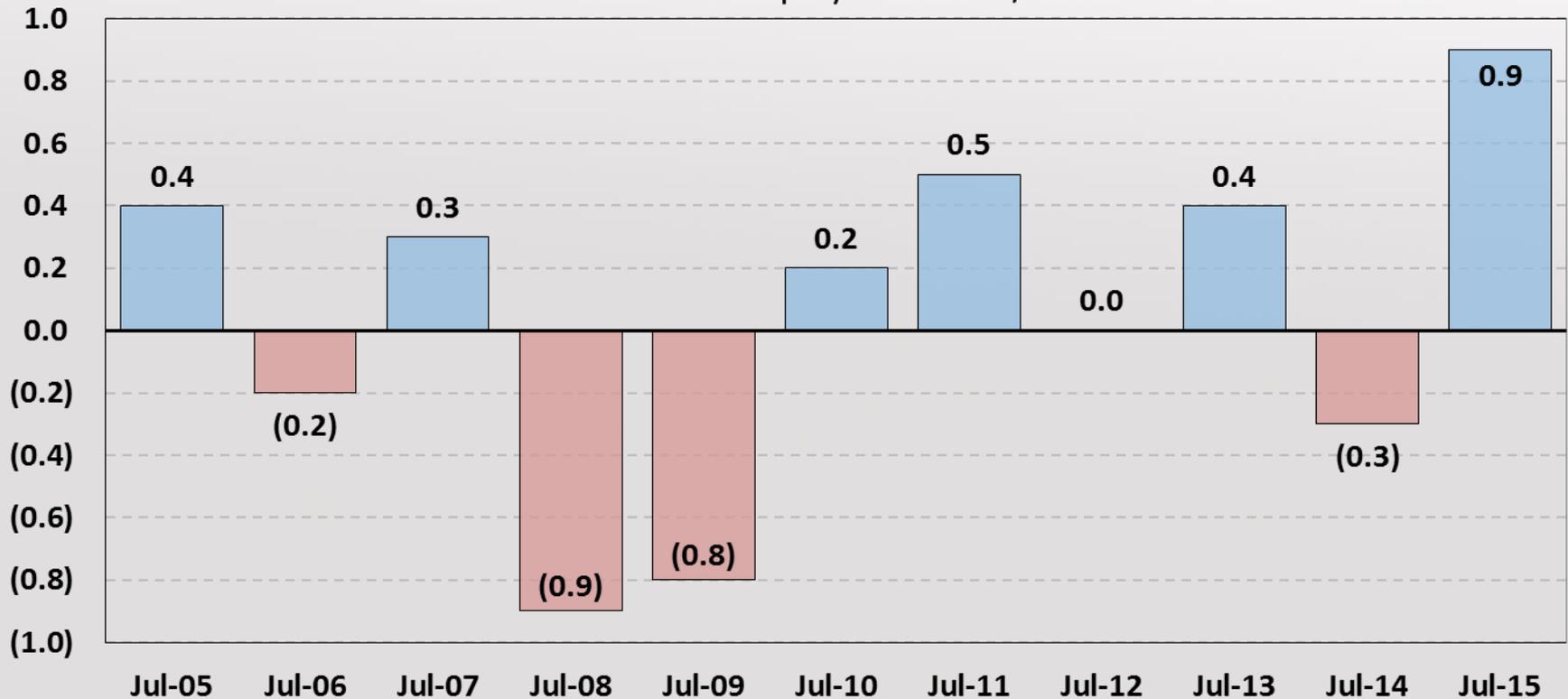


Source: Produced by the Arizona Office of Employment and Population Statistics in cooperation with the U.S. Dept. of Labor, Bureau of Labor Statistics

# Manufacturing

## Over-The-Month Employment Gain/Loss

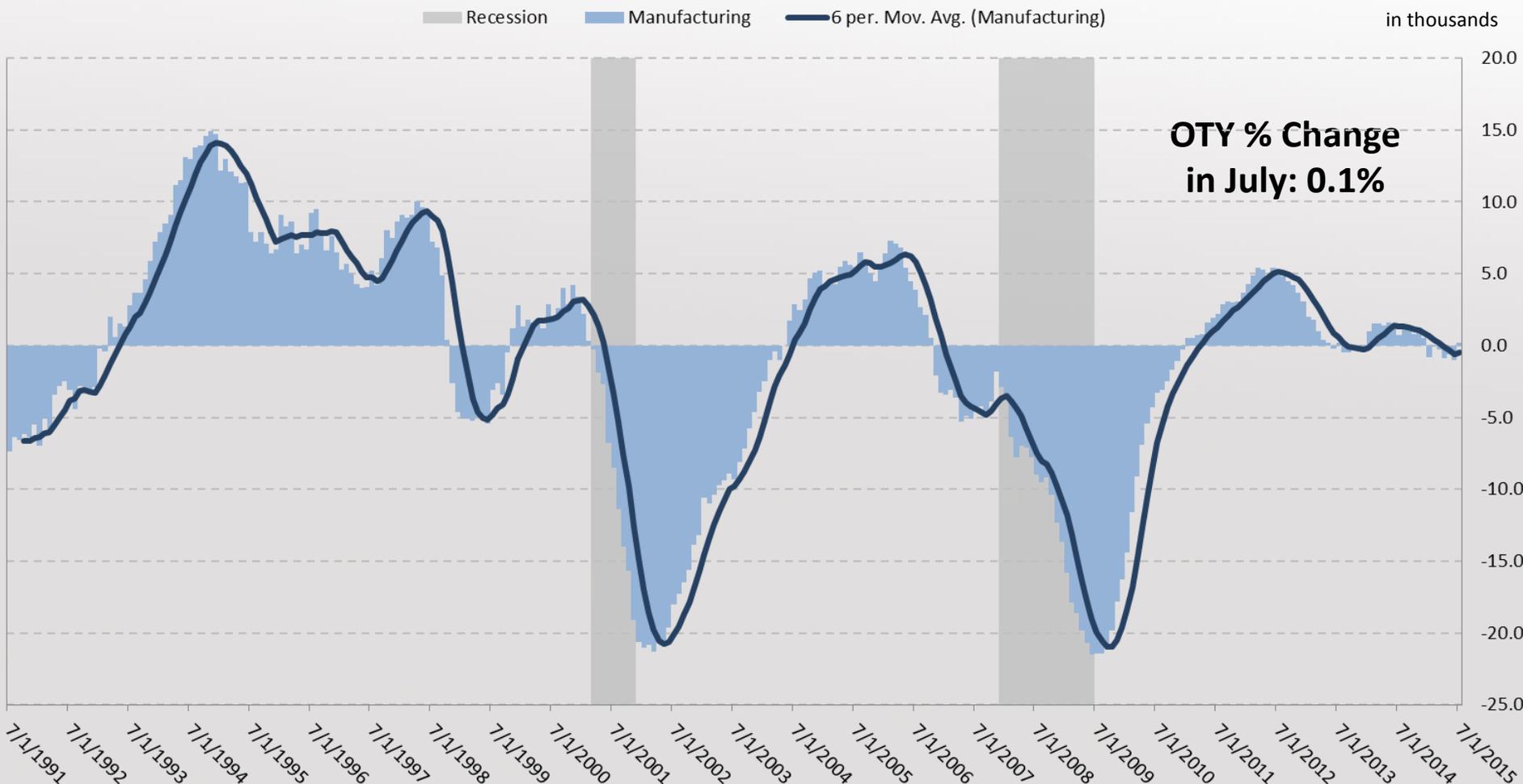
in thousands



**Post-Recession Average ('10-'14): 200 Jobs or 0.1%**

**Historic 10-Year Average ('05-'14): 0 Jobs or 0.0%**

## Arizona Manufacturing Over-the-Year Employment Change

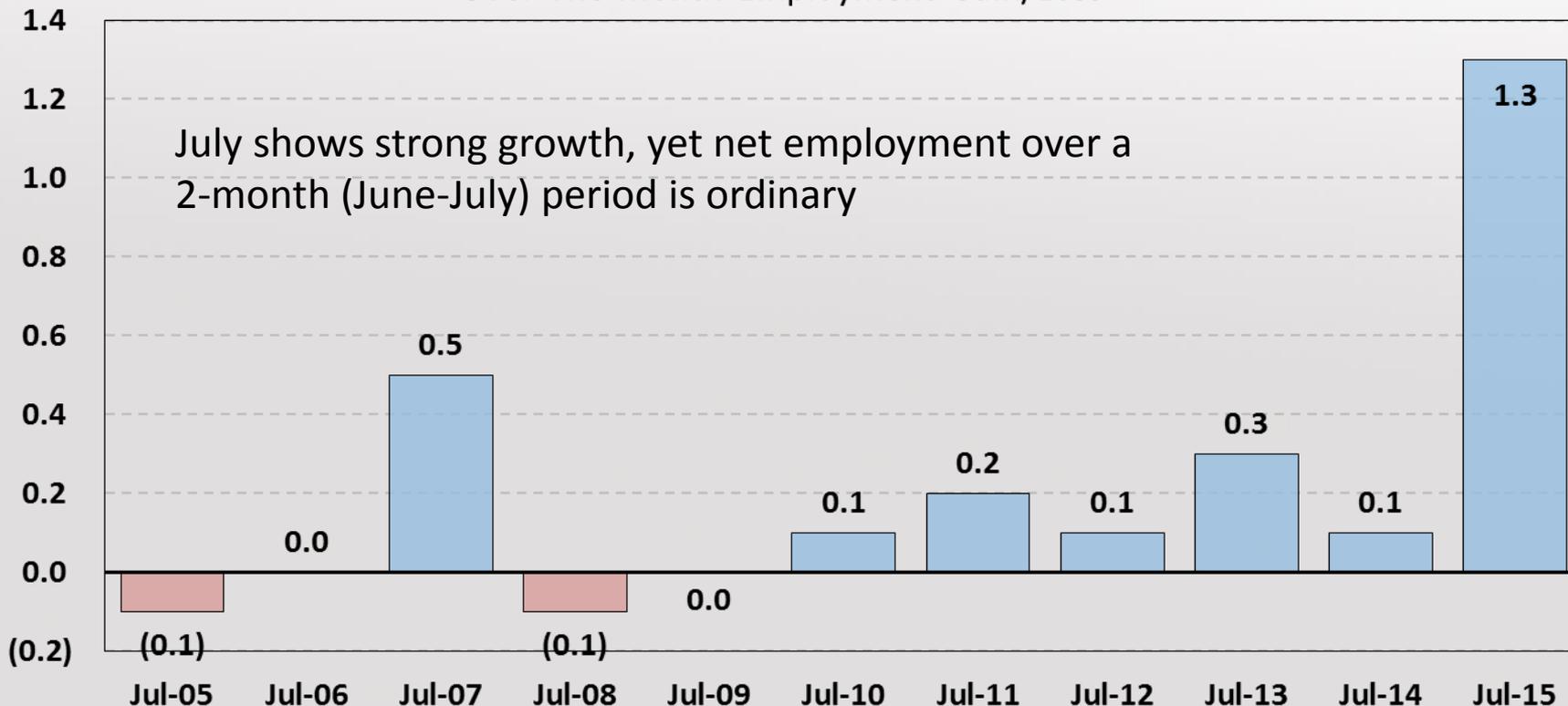


Source: Produced by the Arizona Office of Employment and Population Statistics in cooperation with the U.S. Dept. of Labor, Bureau of Labor Statistics

## Within Manufacturing Nondurable Goods

Over-The-Month Employment Gain/Loss

in thousands

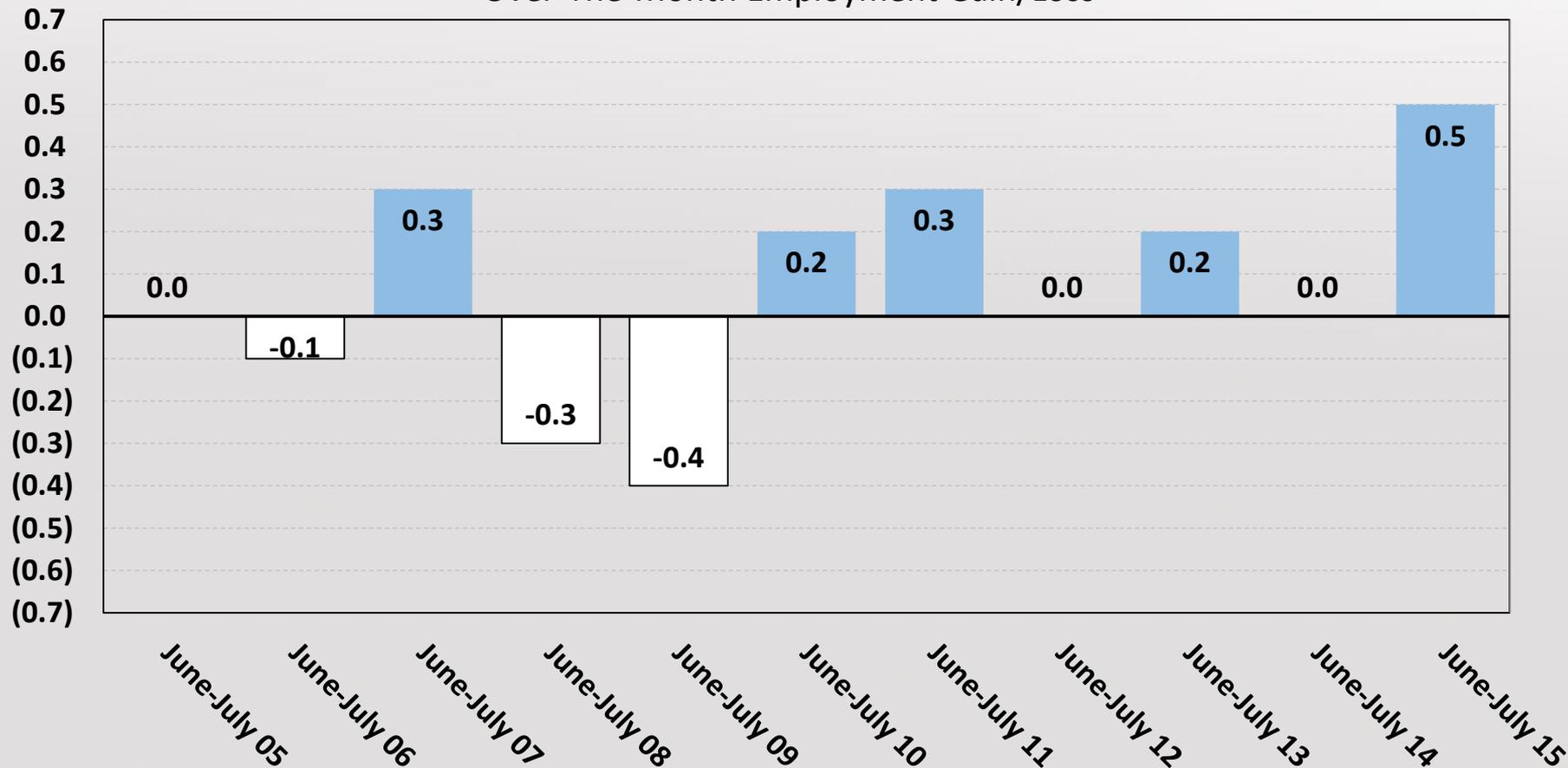


**Post-Recession Average ('10-'14): 200 Jobs or 0.5%**  
**Historic 10-Year Average ('05-'14): 100 Jobs or 0.3%**

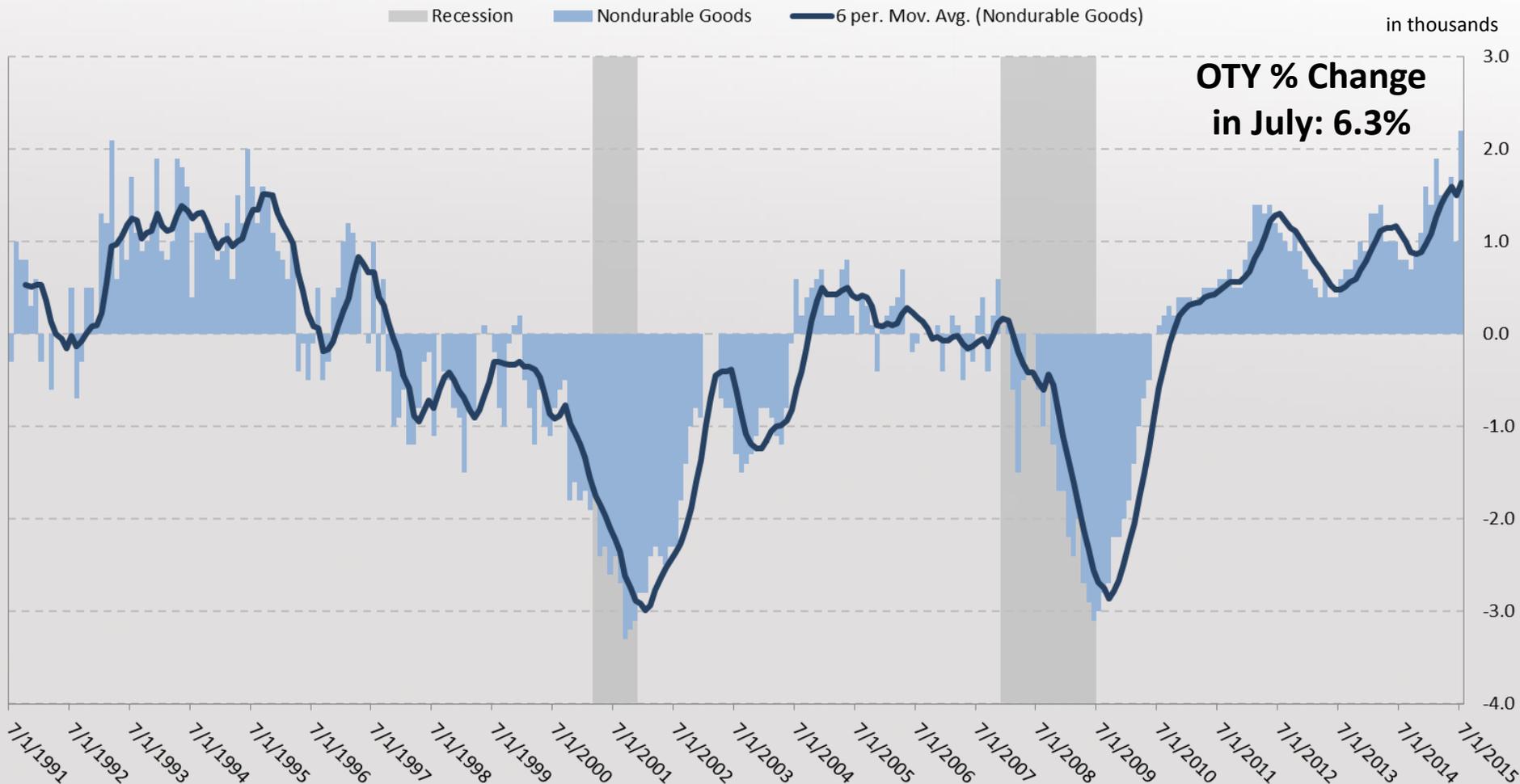
# Within Manufacturing Nondurable Goods

Over-The-Month Employment Gain/Loss

in thousands



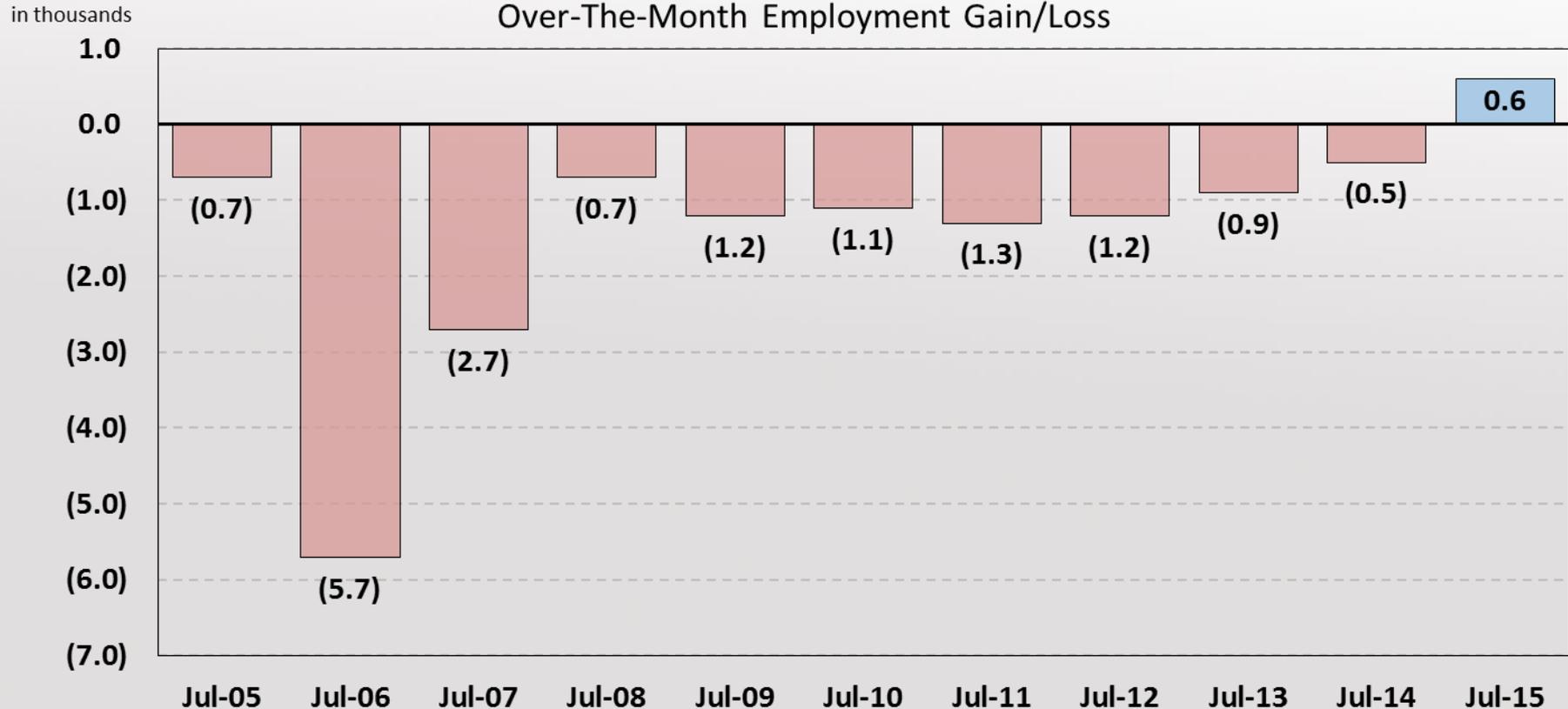
## Arizona Nondurable Goods Over-the-Year Employment Change



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

## Other Services

Over-The-Month Employment Gain/Loss

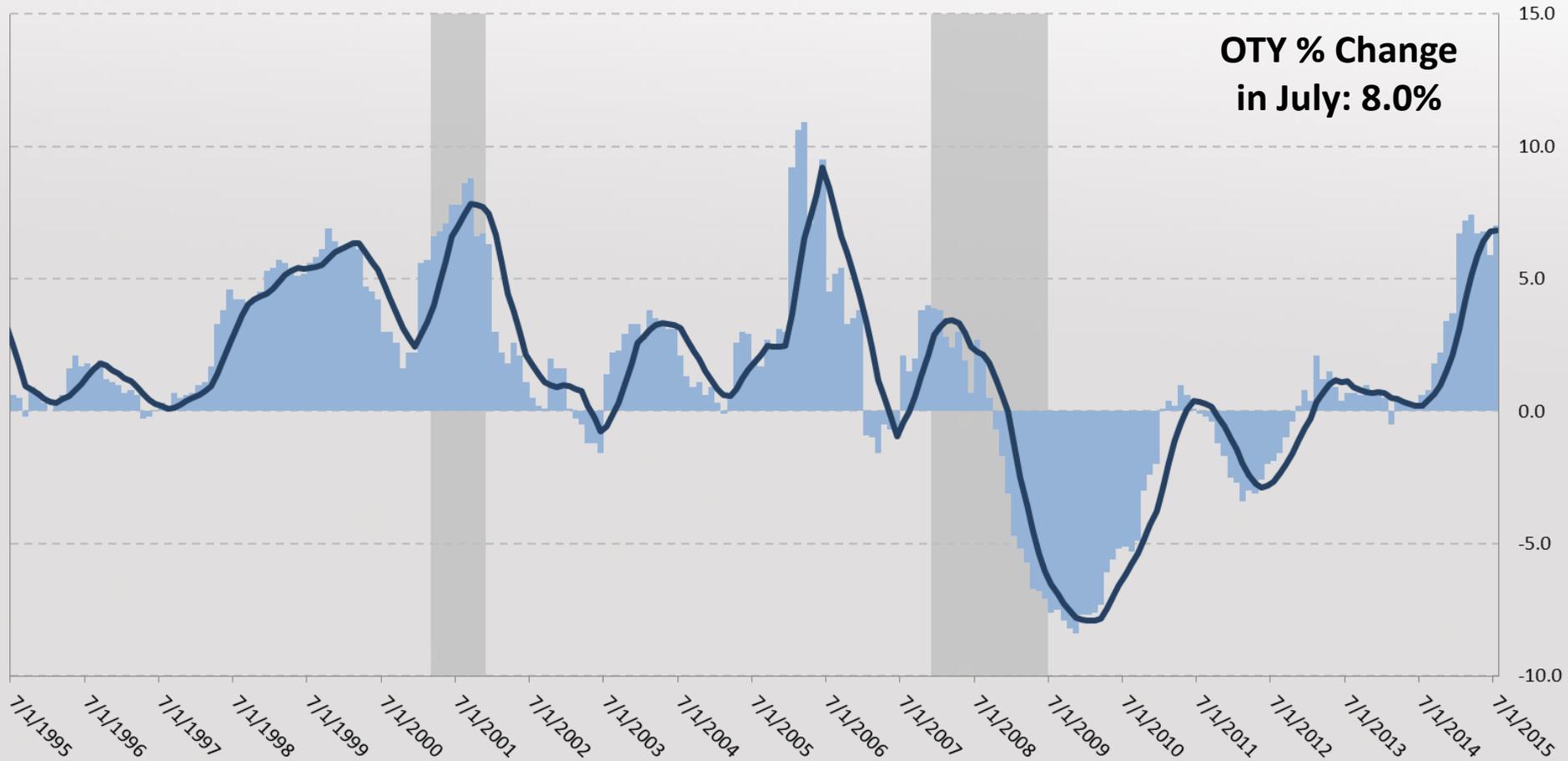


**Post-Recession Average ('10-'14): -1,000 Jobs or -1.1%**  
**Historic 10-Year Average ('05-'14): -1,600 Jobs or -1.7%**

## Arizona Other Services Over-the-Year Employment Change

Recession
  Other Services
  6 per. Mov. Avg. (Other Services)

in thousands

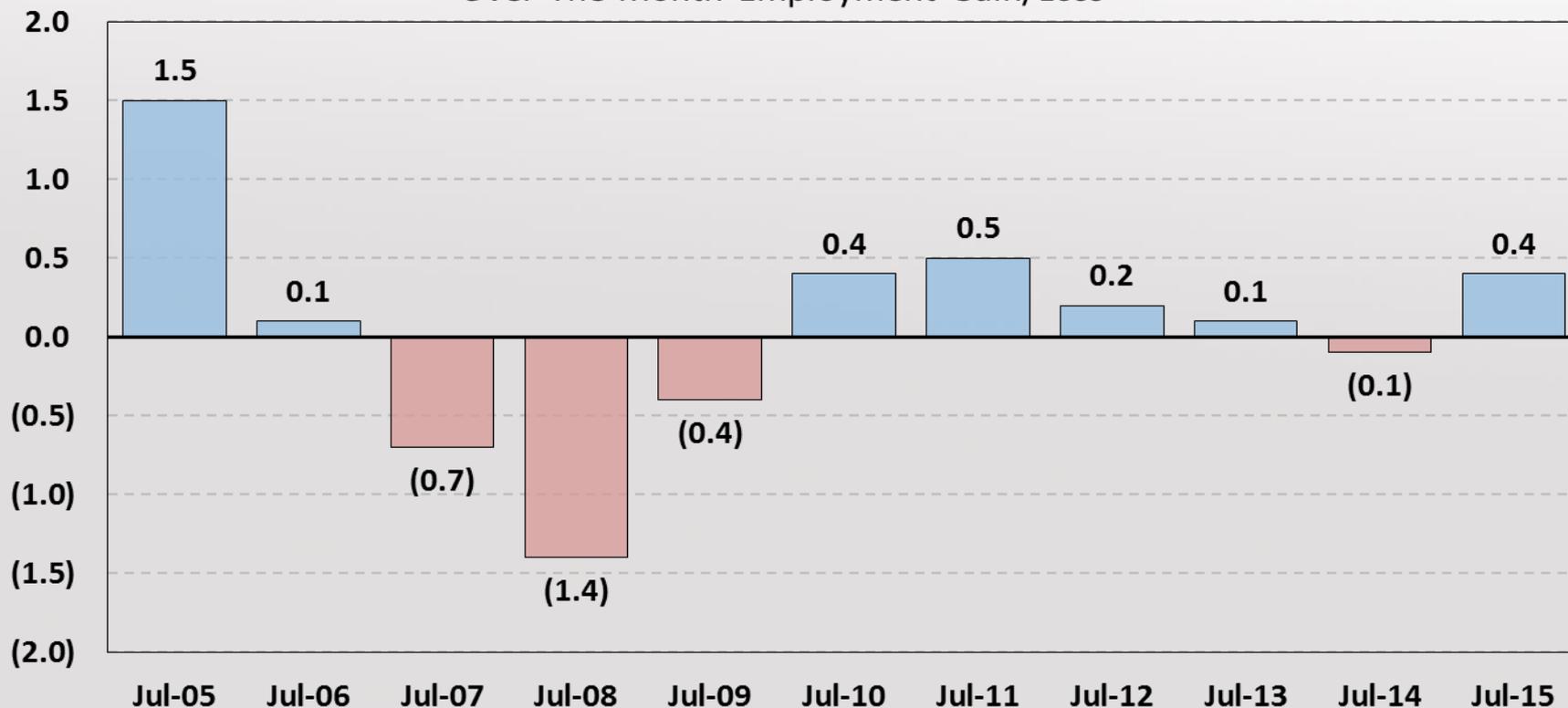


Source: Produced by the Arizona Office of Employment and Population Statistics in cooperation with the U.S. Dept. of Labor, Bureau of Labor Statistics

## Financial Activities

### Over-The-Month Employment Gain/Loss

in thousands



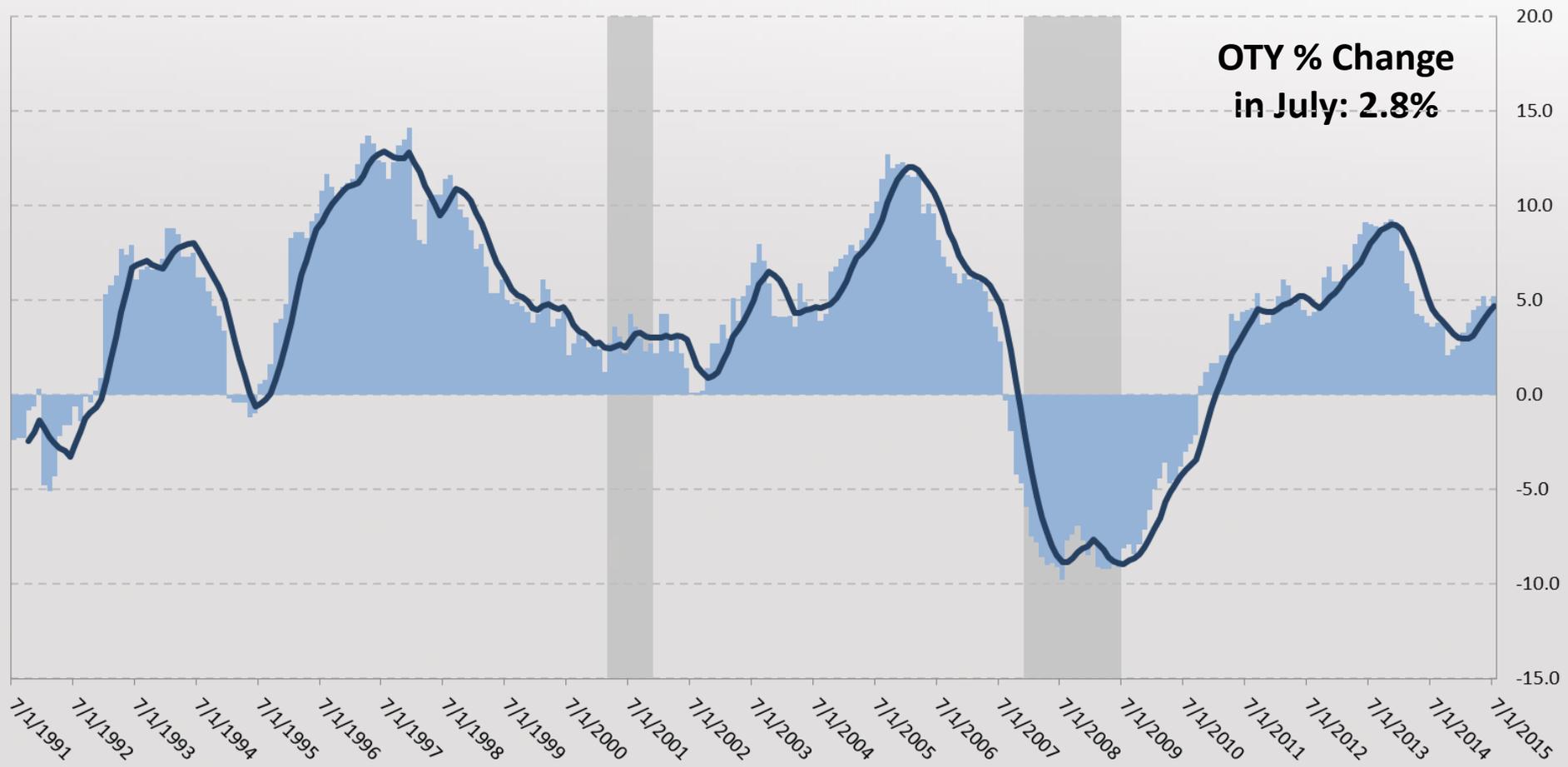
**Post-Recession Average ('10-'14): 200 Jobs or 0.1%**

**Historic 10-Year Average ('05-'14): 0 Jobs or 0.0%**

## Arizona Financial Activities Over-the-Year Employment Change

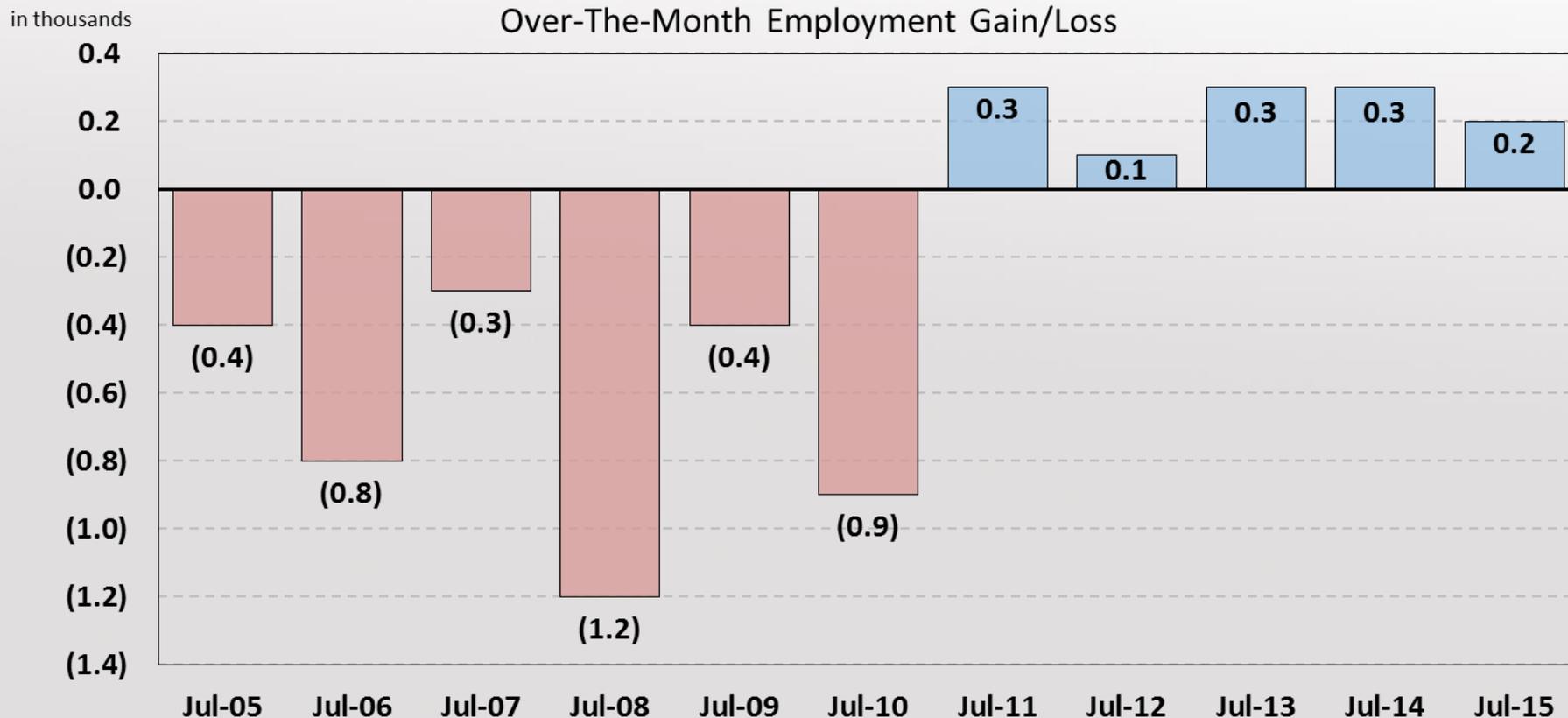
Recession
  Financial Activities
  6 per. Mov. Avg. (Financial Activities)

in thousands



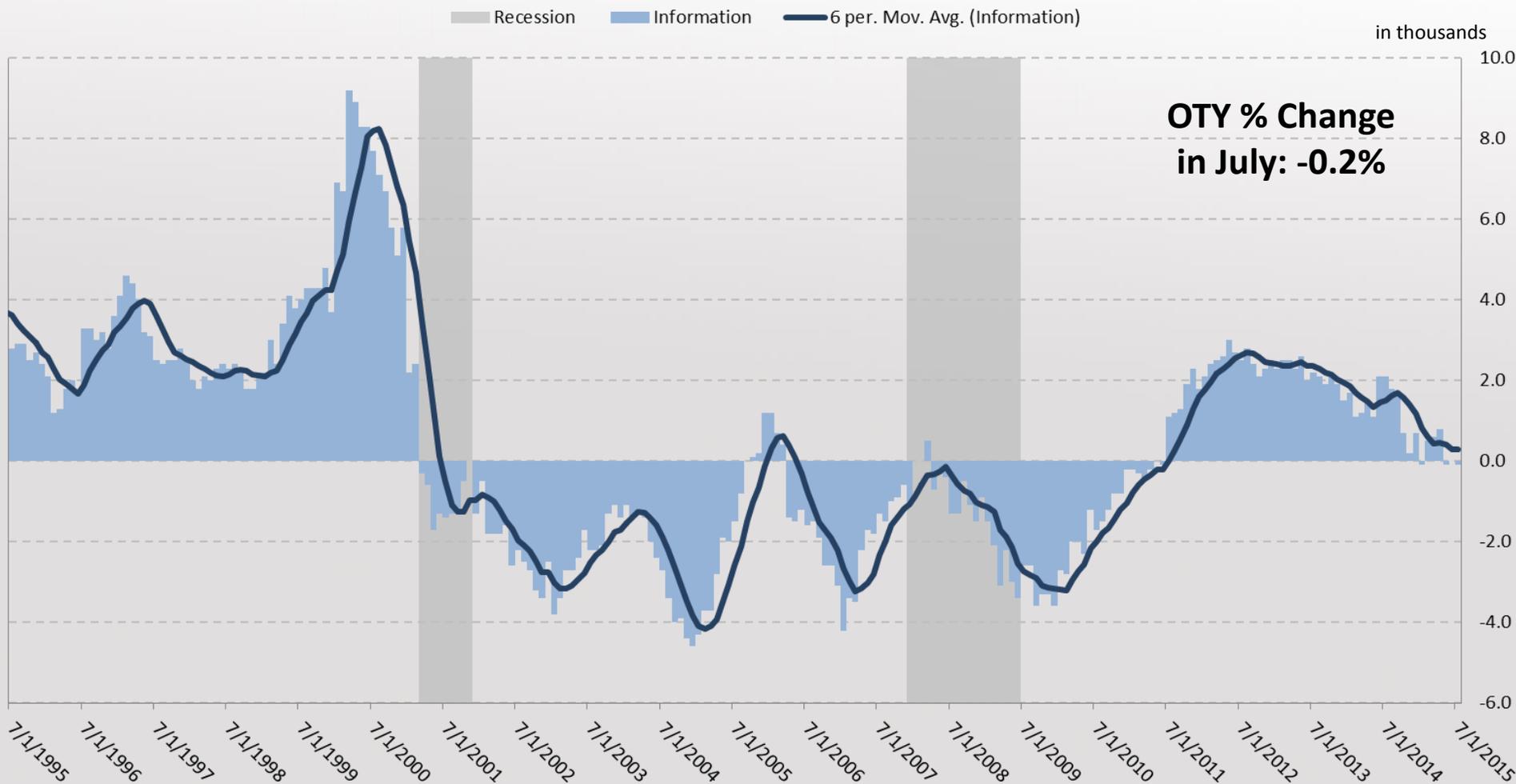
Source: Produced by the Arizona Office of Employment and Population Statistics in cooperation with the U.S. Dept. of Labor, Bureau of Labor Statistics

## Information



**Post-Recession Average ('10-'14): 0 Jobs or 0.0%**  
**Historic 10-Year Average ('05-'14): -300 Jobs or -0.7%**

## Arizona Information Over-the-Year Employment Change

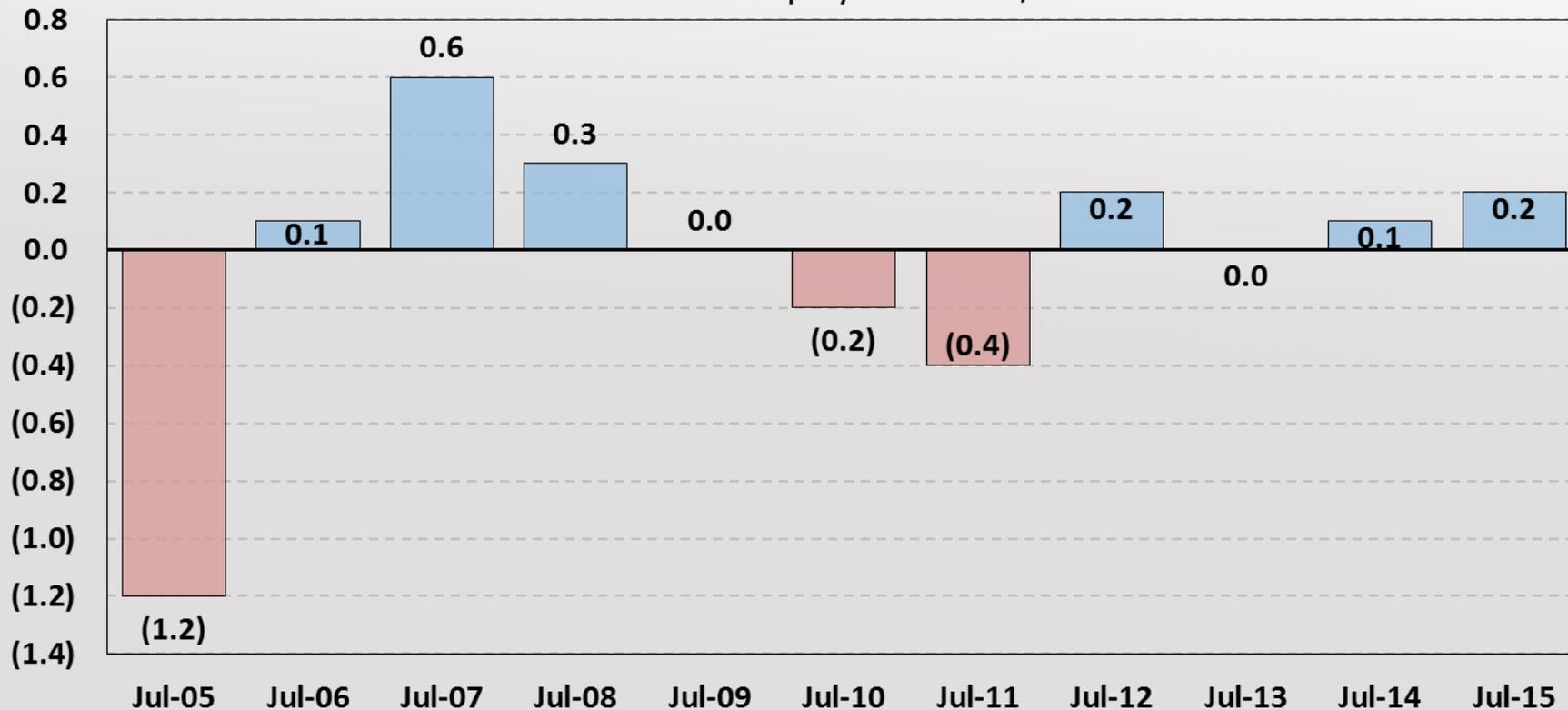


Source: Produced by the Arizona Office of Employment and Population Statistics in cooperation with the U.S. Dept. of Labor, Bureau of Labor Statistics

## Natural Resources & Mining

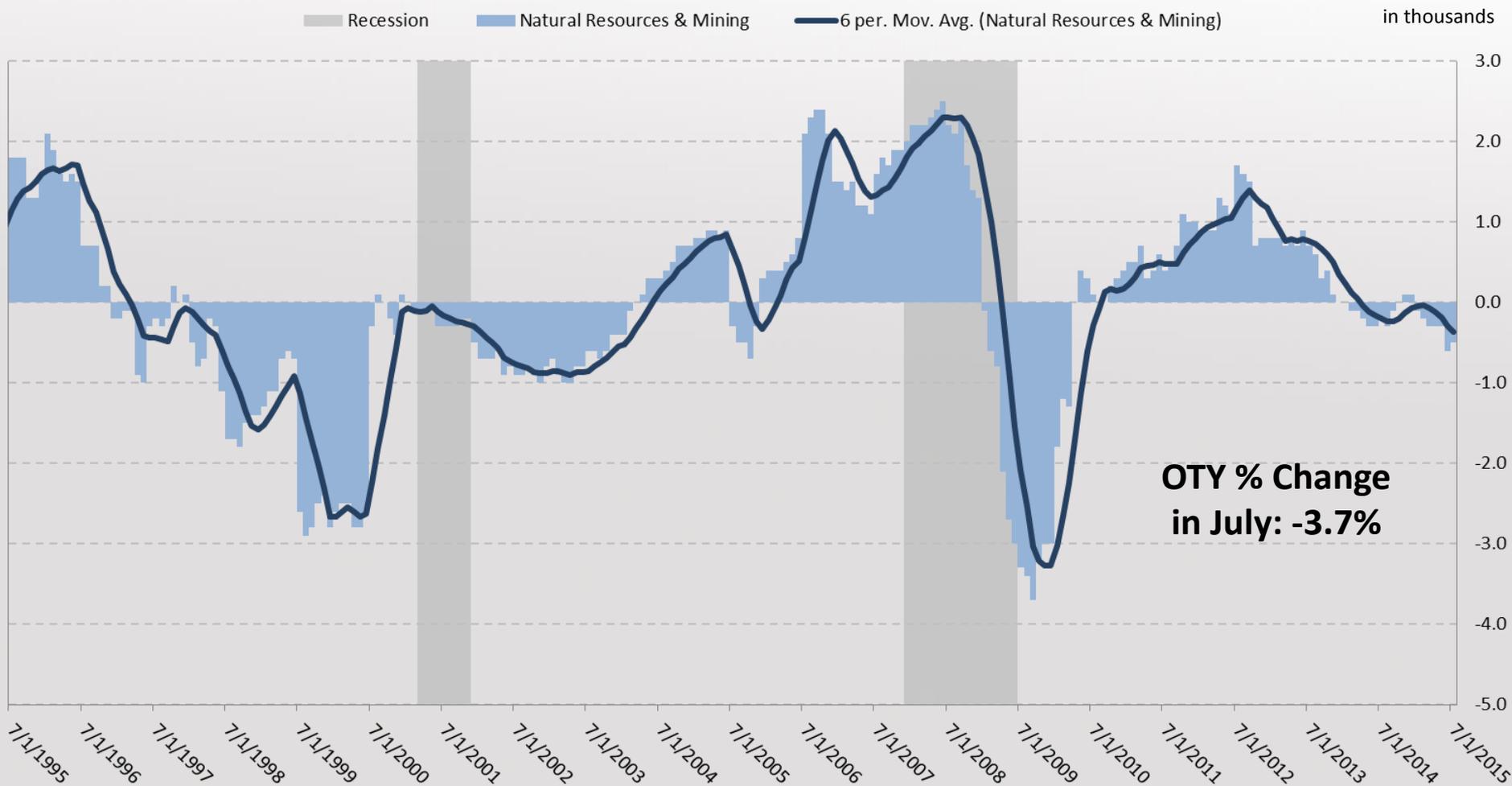
Over-The-Month Employment Gain/Loss

in thousands



**Post-Recession Average ('10-'14): -100 Jobs or -0.6%**  
**Historic 10-Year Average ('05-'14): -100 Jobs or -0.7%**

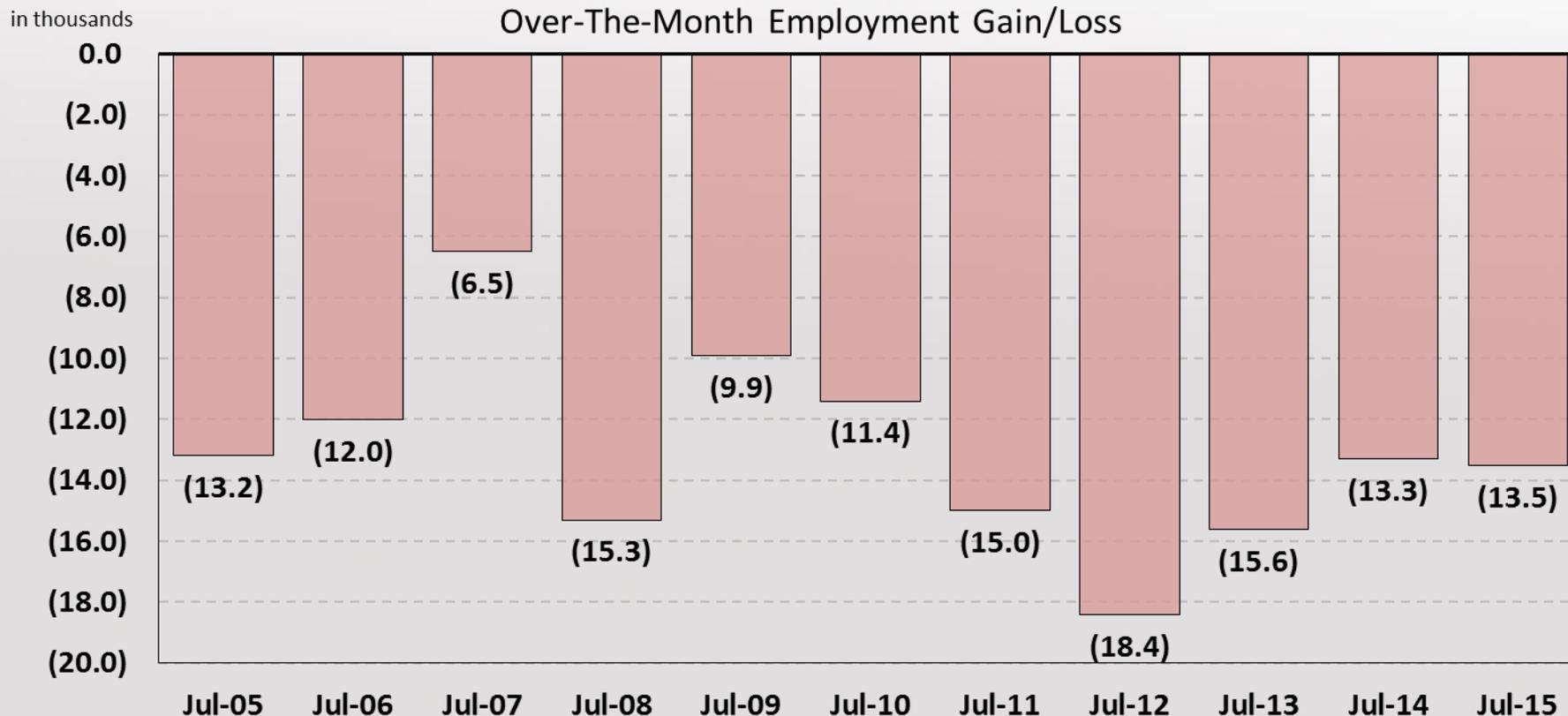
## Arizona Natural Resources & Mining Over-the-Year Employment Change



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

## Government

### Over-The-Month Employment Gain/Loss

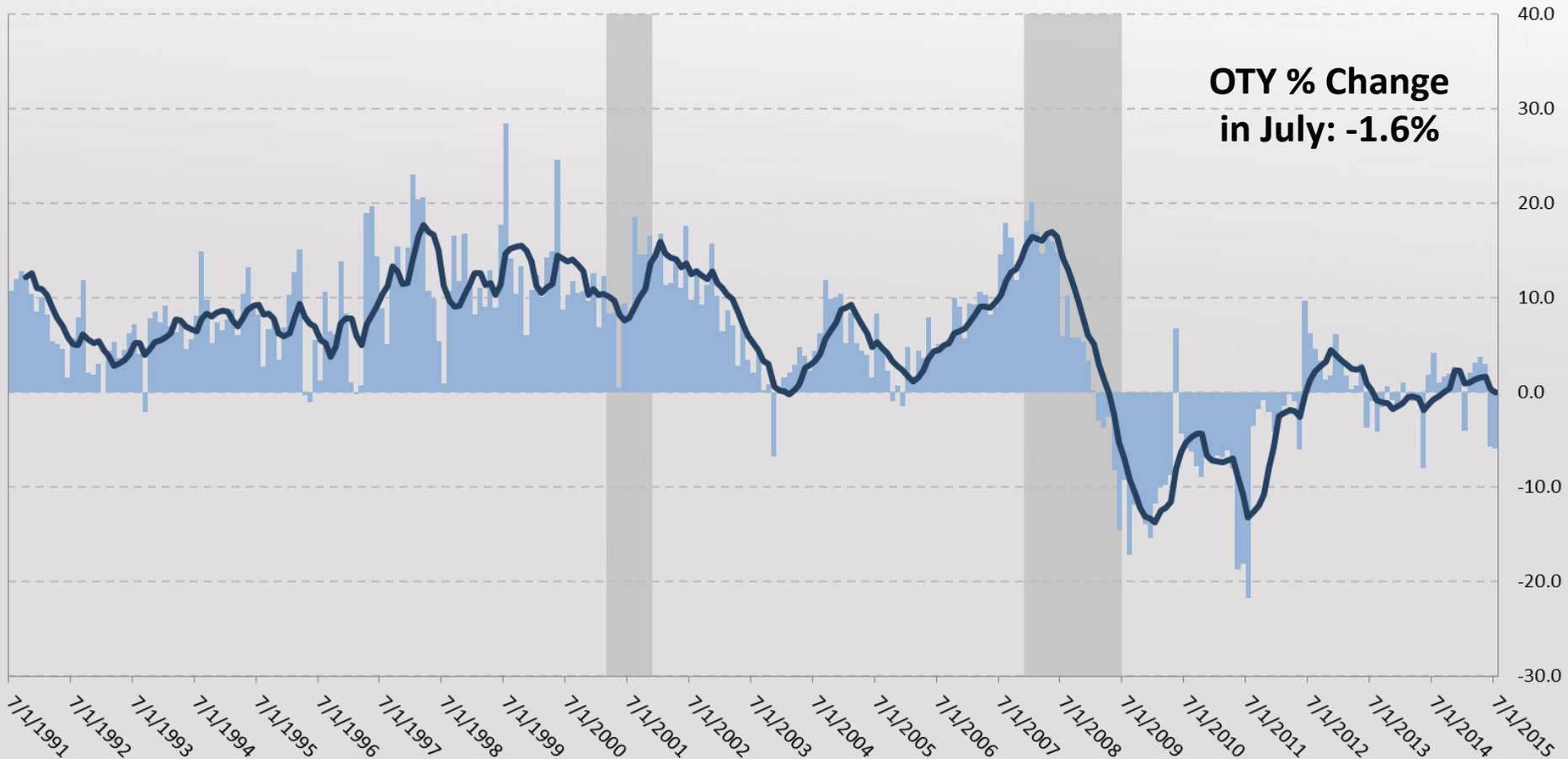


**Post-Recession Average ('10-'14): -14,700 Jobs or -3.9%**  
**Historic 10-Year Average ('05-'14): -13,100 Jobs or -3.4%**

## Arizona Government Over-the-Year Employment Change

Recession Government 6 per. Mov. Avg. (Government)

in thousands



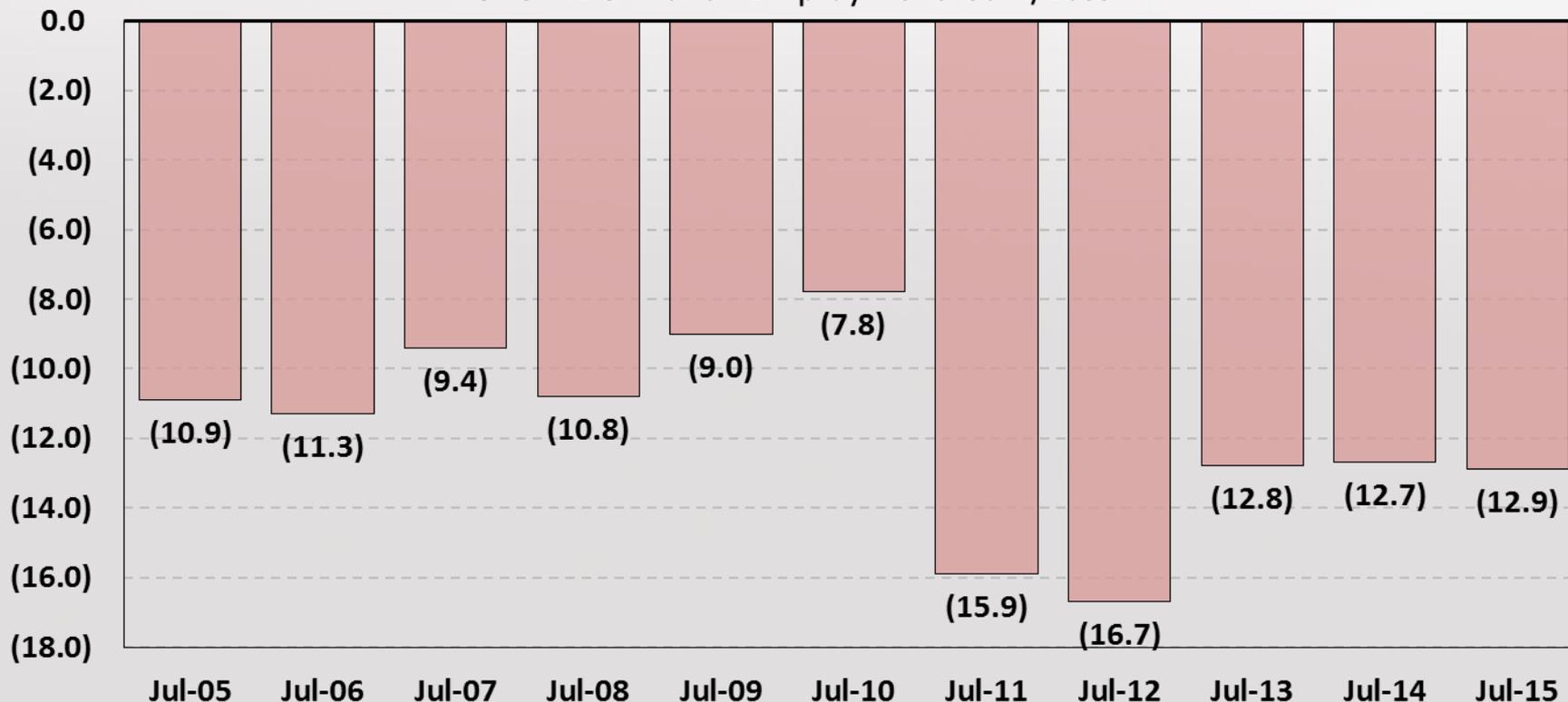
Source: Produced by the Arizona Office of Employment and Population Statistics in cooperation with the U.S. Dept. of Labor, Bureau of Labor Statistics

# Within Government

## Local Government Education

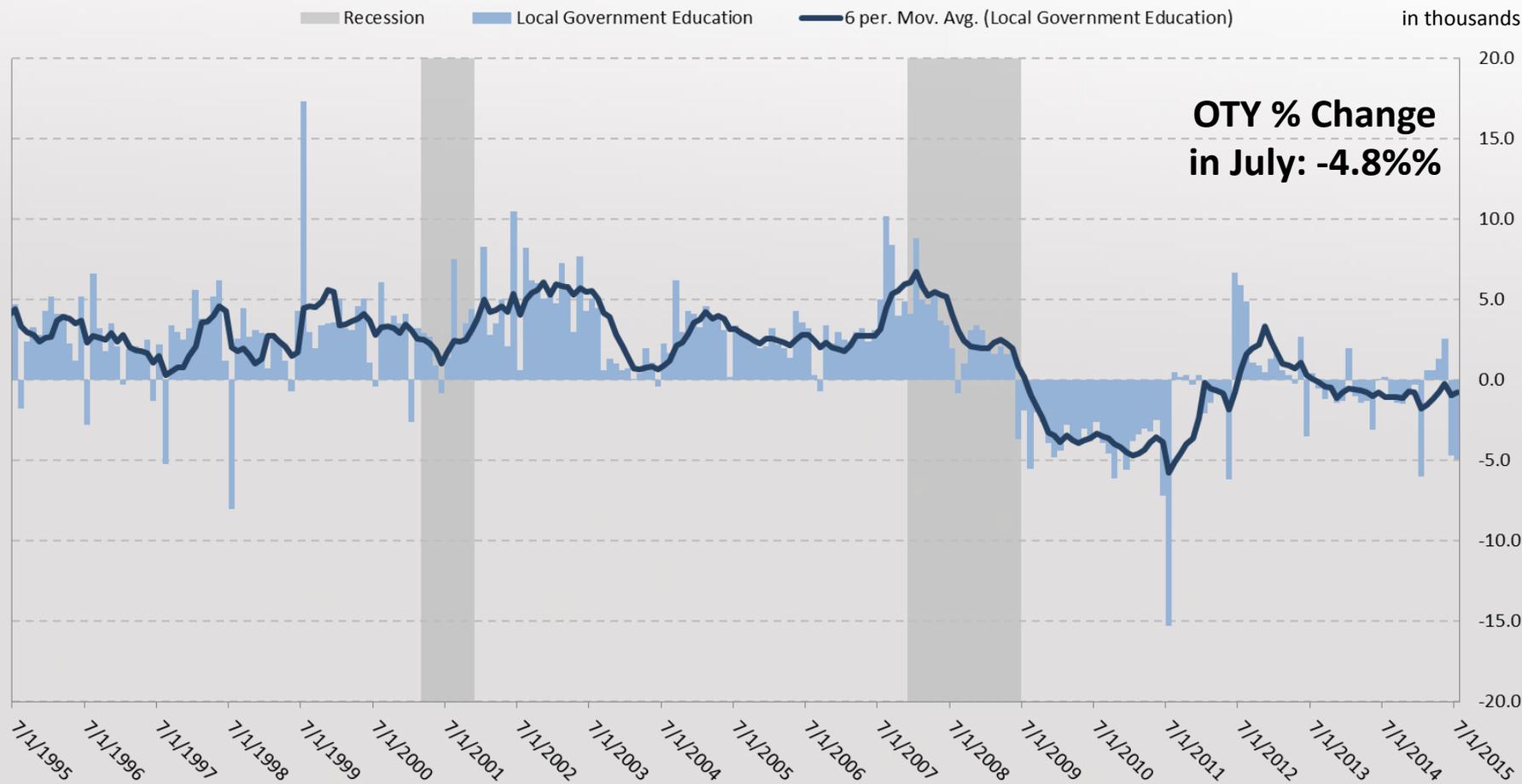
Over-The-Month Employment Gain/Loss

in thousands



**Post-Recession Average ('10-'14): -13,200 Jobs or -11.4%**  
**Historic 10-Year Average ('05-'14): -11,700 Jobs or -9.9%**

## Arizona Local Government Education Over-the-Year Employment Change

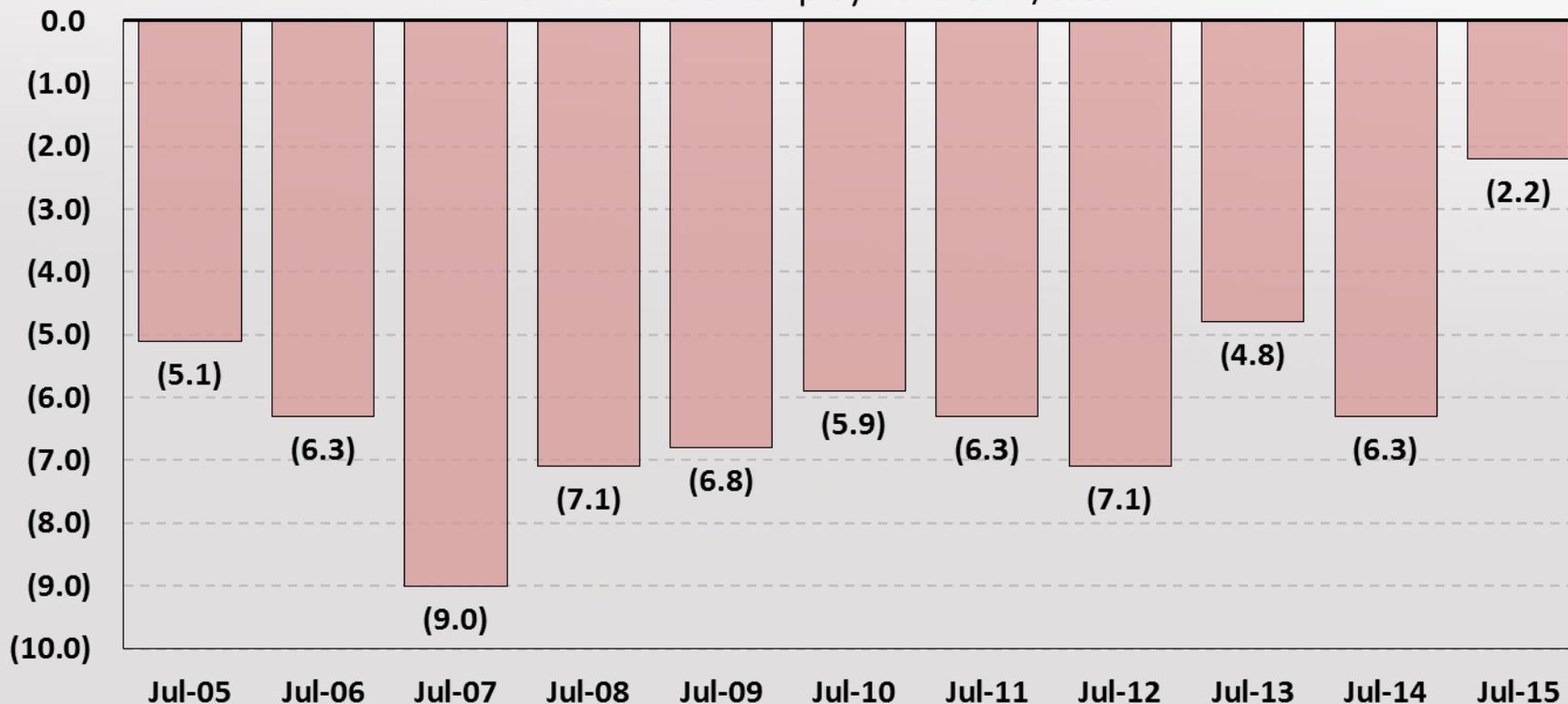


Source: Produced by the Arizona Office of Employment and Population Statistics in cooperation with the U.S. Dept. of Labor, Bureau of Labor Statistics

## Leisure & Hospitality

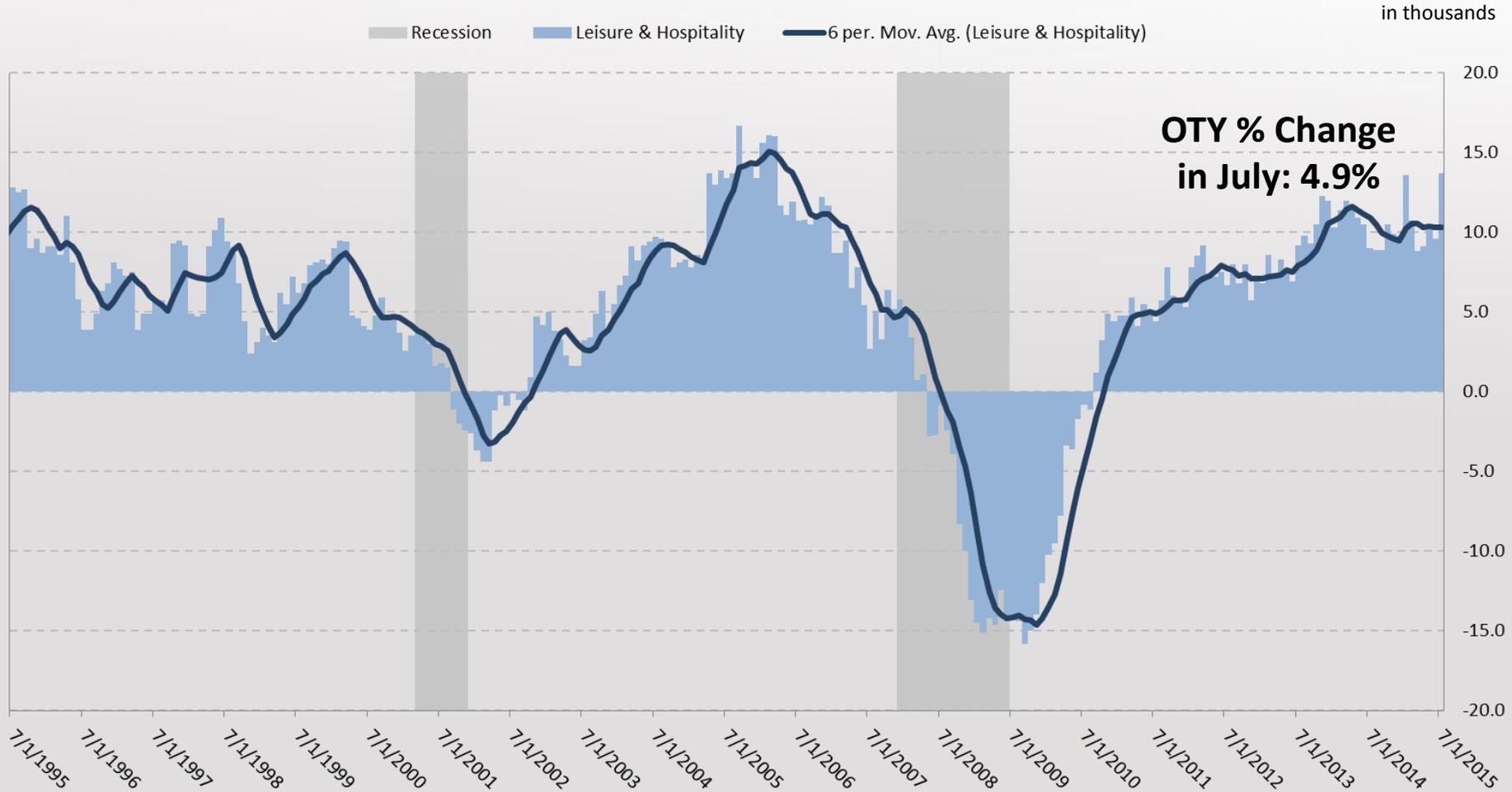
### Over-The-Month Employment Gain/Loss

in thousands



**Post-Recession Average ('10-'14): -6,100 Jobs or -2.3%**  
**Historic 10-Year Average ('05-'14): -6,500 Jobs or -2.4%**

## Arizona Leisure & Hospitality Over-the-Year Employment Change



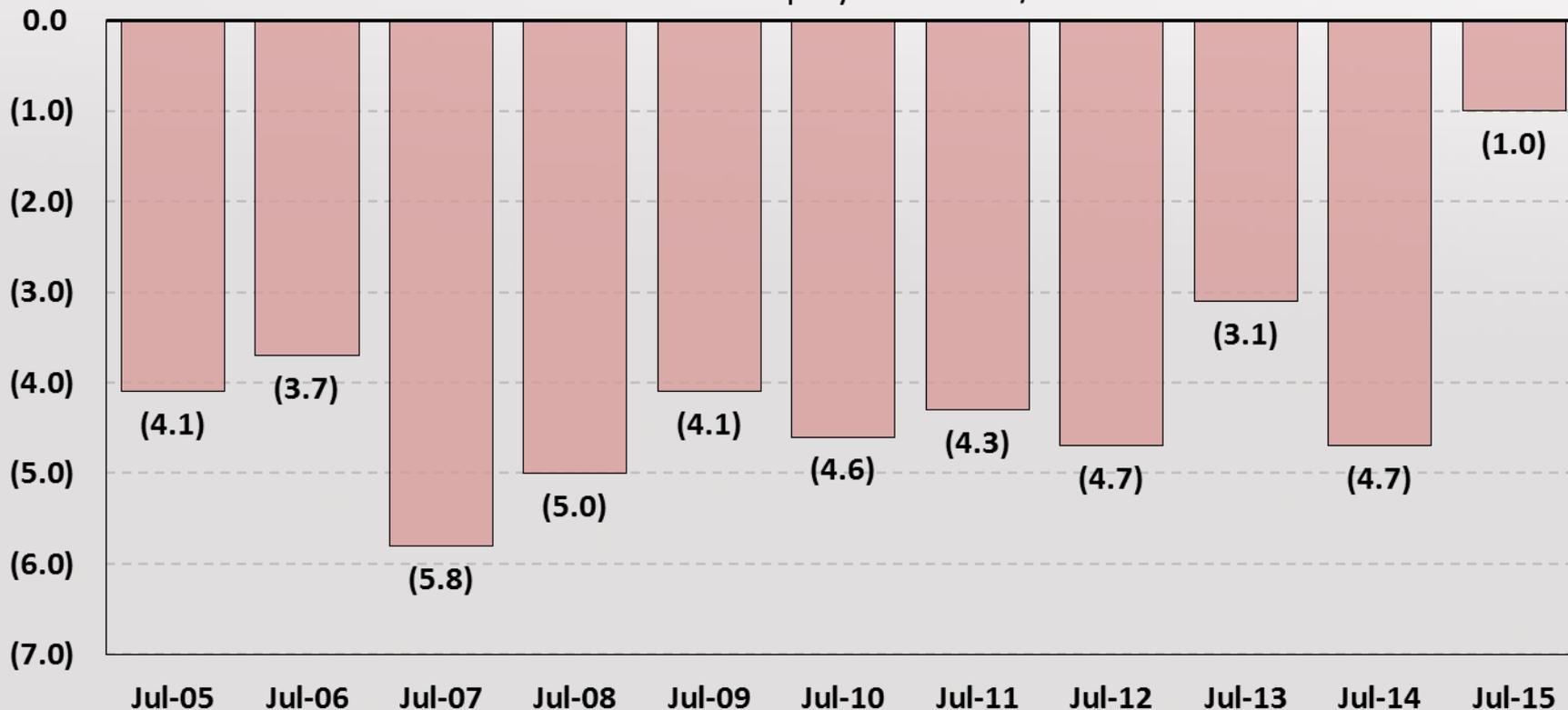
Source: Produced by the Arizona Office of Employment and Population Statistics in cooperation with the U.S. Dept. of Labor, Bureau of Labor Statistics

# Within Leisure & Hospitality

## Food Services and Drinking Places

Over-The-Month Employment Gain/Loss

in thousands

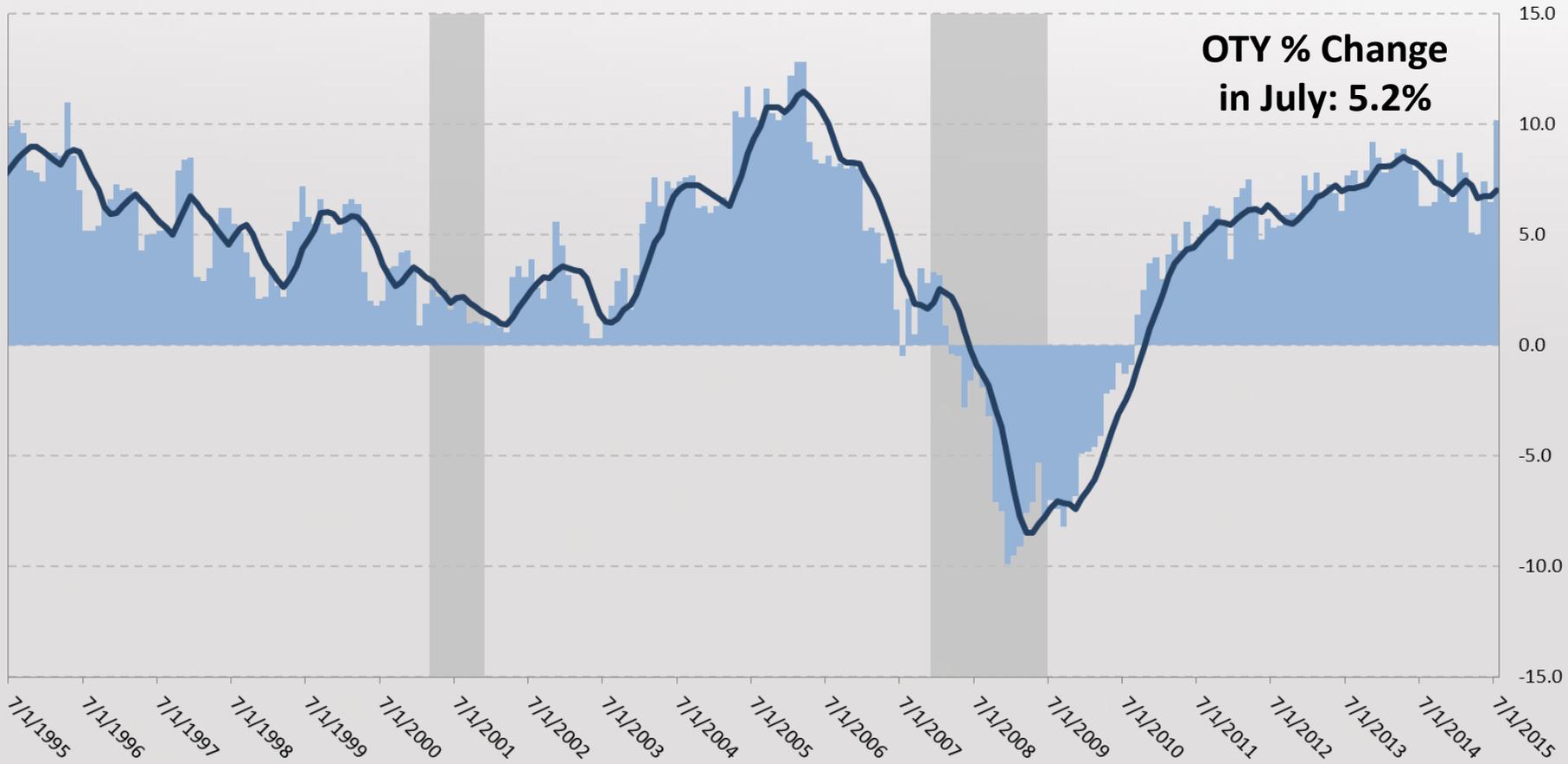


Post-Recession Average ('10-'14): -4,300 Jobs or -2.3%  
 Historic 10-Year Average ('05-'14): -4,400 Jobs or -2.4%

## Arizona Food Svcs & Drinking Places Over-the-Year Employment Change

in thousands

Recession
  Food Services and Drinking Places
  6 per. Mov. Avg. (Food Services and Drinking Places)

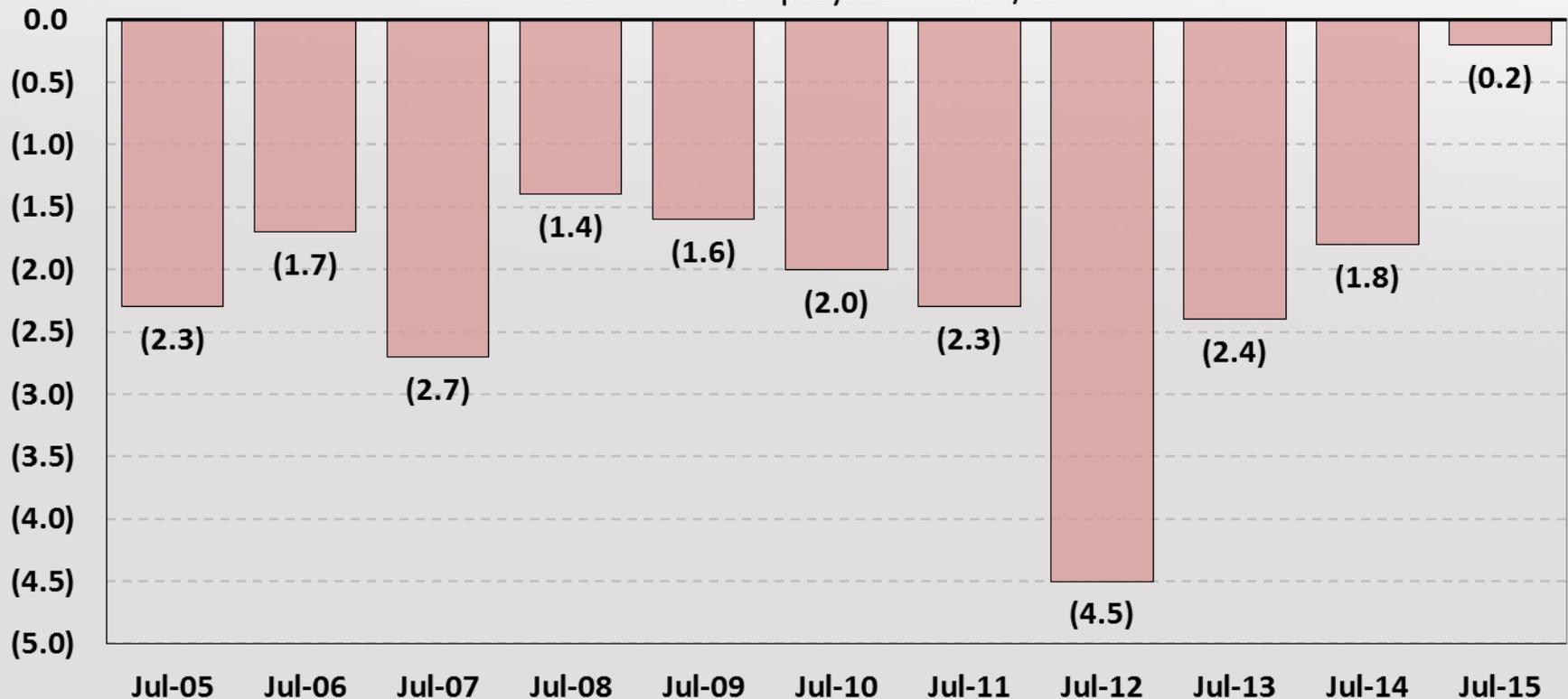


Source: Produced by the Arizona Office of Employment and Population Statistics in cooperation with the U.S. Dept. of Labor, Bureau of Labor Statistics

## Education and Health Services

Over-The-Month Employment Gain/Loss

in thousands

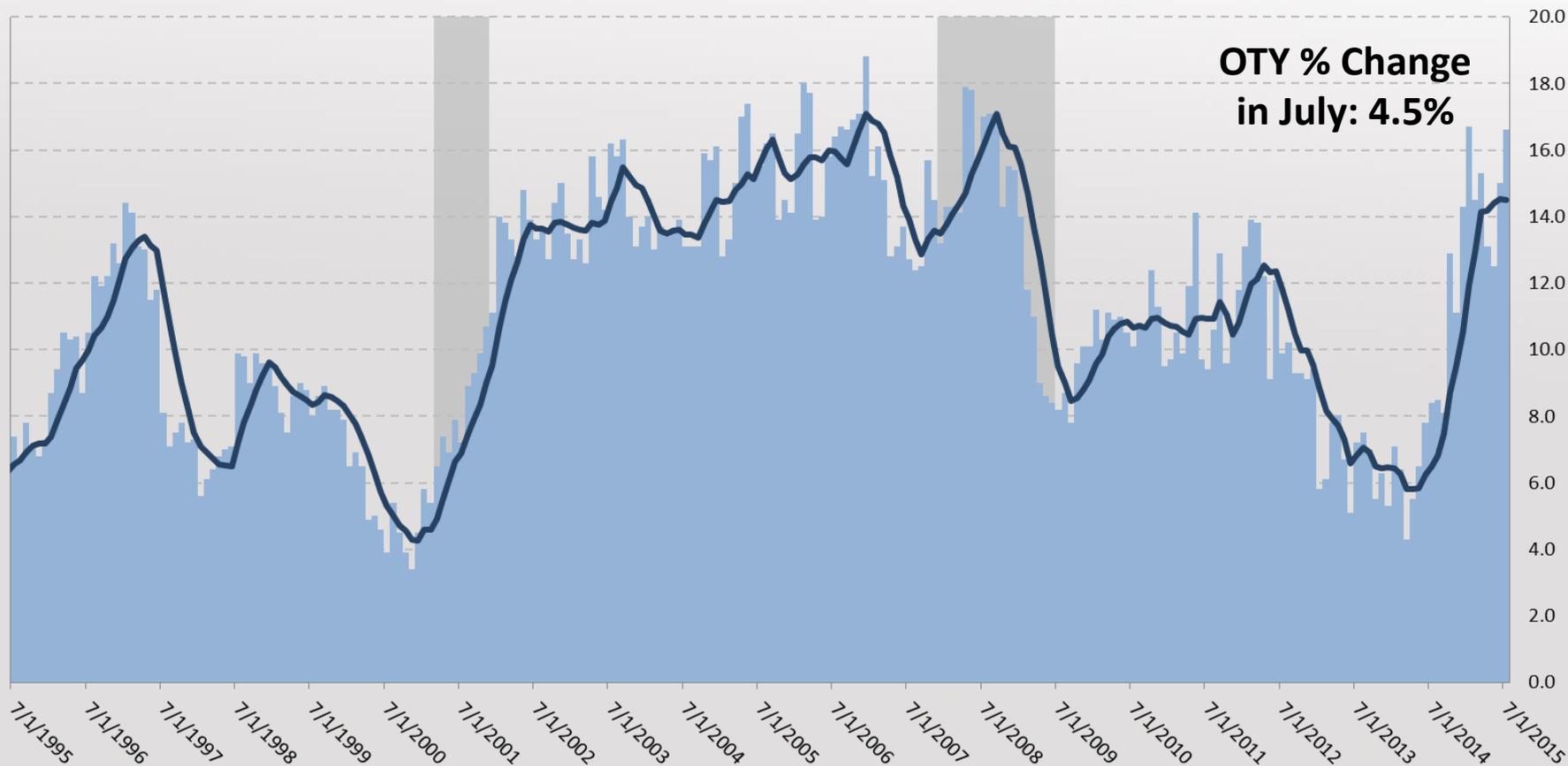


**Post-Recession Average ('10-'14): -2,600 Jobs or -0.7%**  
**Historic 10-Year Average ('05-'14): -2,300 Jobs or -0.7%**

## Arizona Education & Health Svcs Over-the-Year Employment Change

in thousands

Recession
  Education and Health Services
  6 per. Mov. Avg. (Education and Health Services)



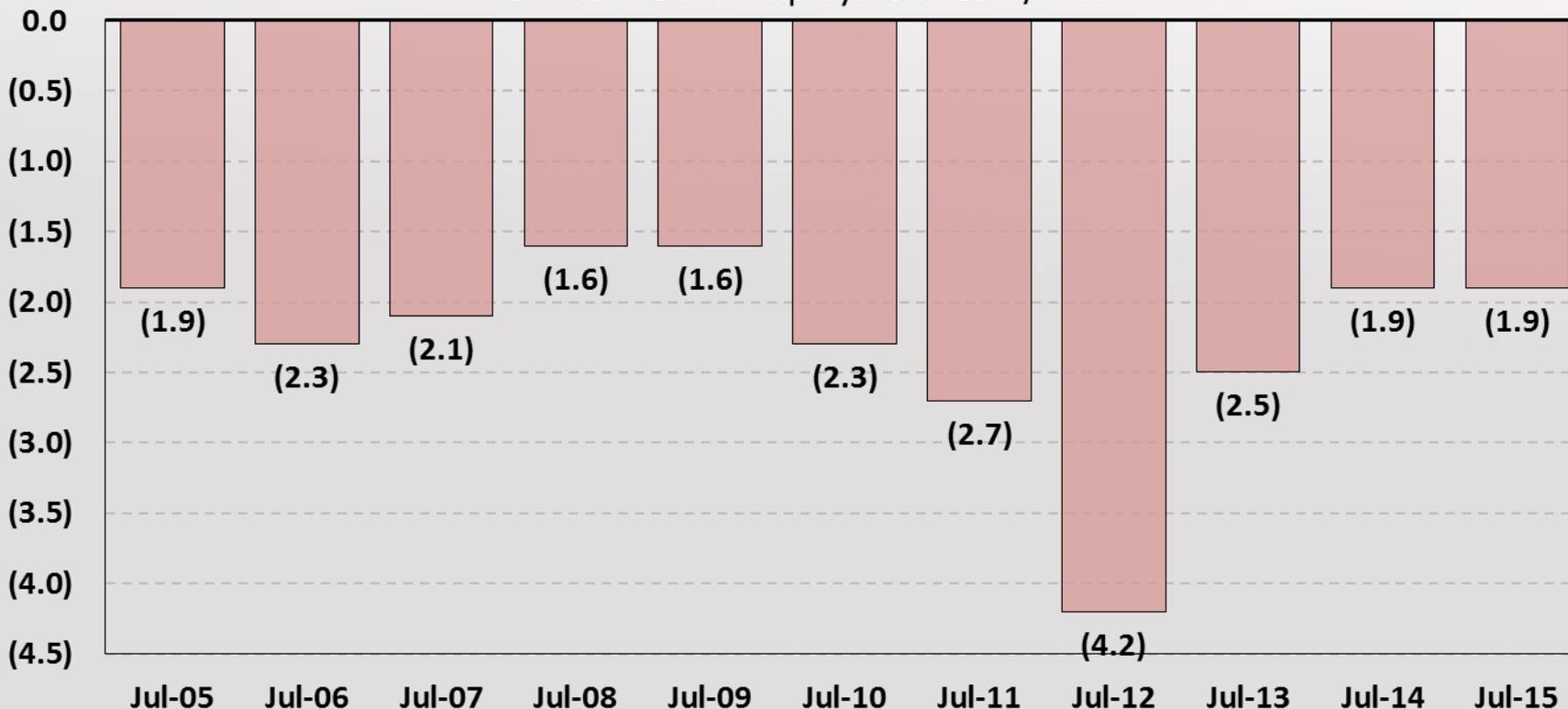
Source: Produced by the Arizona Office of Employment and Population Statistics in cooperation with the U.S. Dept. of Labor, Bureau of Labor Statistics

# Within Education & Health Svcs

## Educational Services

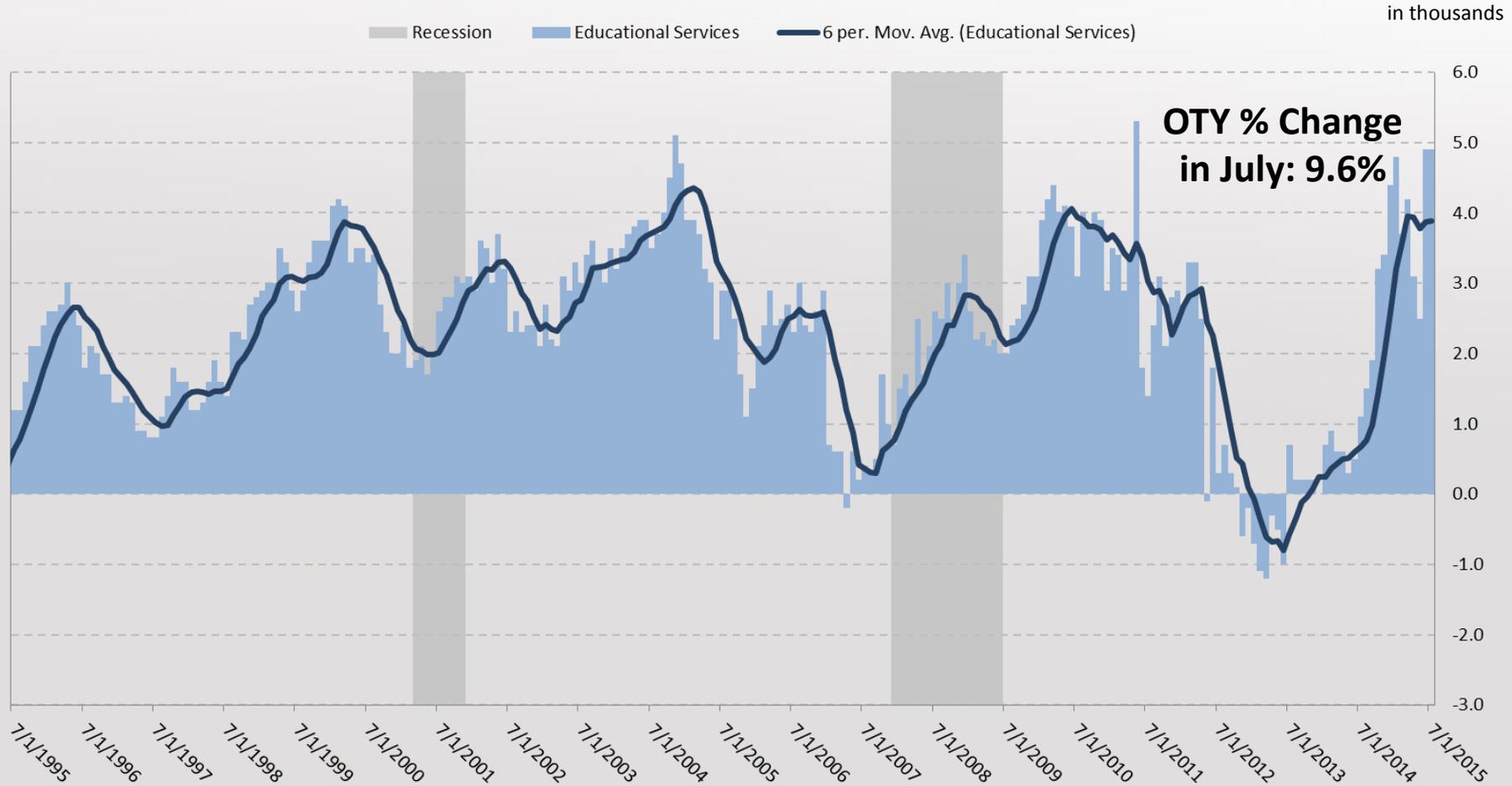
Over-The-Month Employment Gain/Loss

in thousands



Post-Recession Average ('10-'14): -2,700 Jobs or -5.2%  
 Historic 10-Year Average ('05-'14): -2,300 Jobs or -4.8%

## Arizona Educational Svcs. Over-the-Year Employment Change



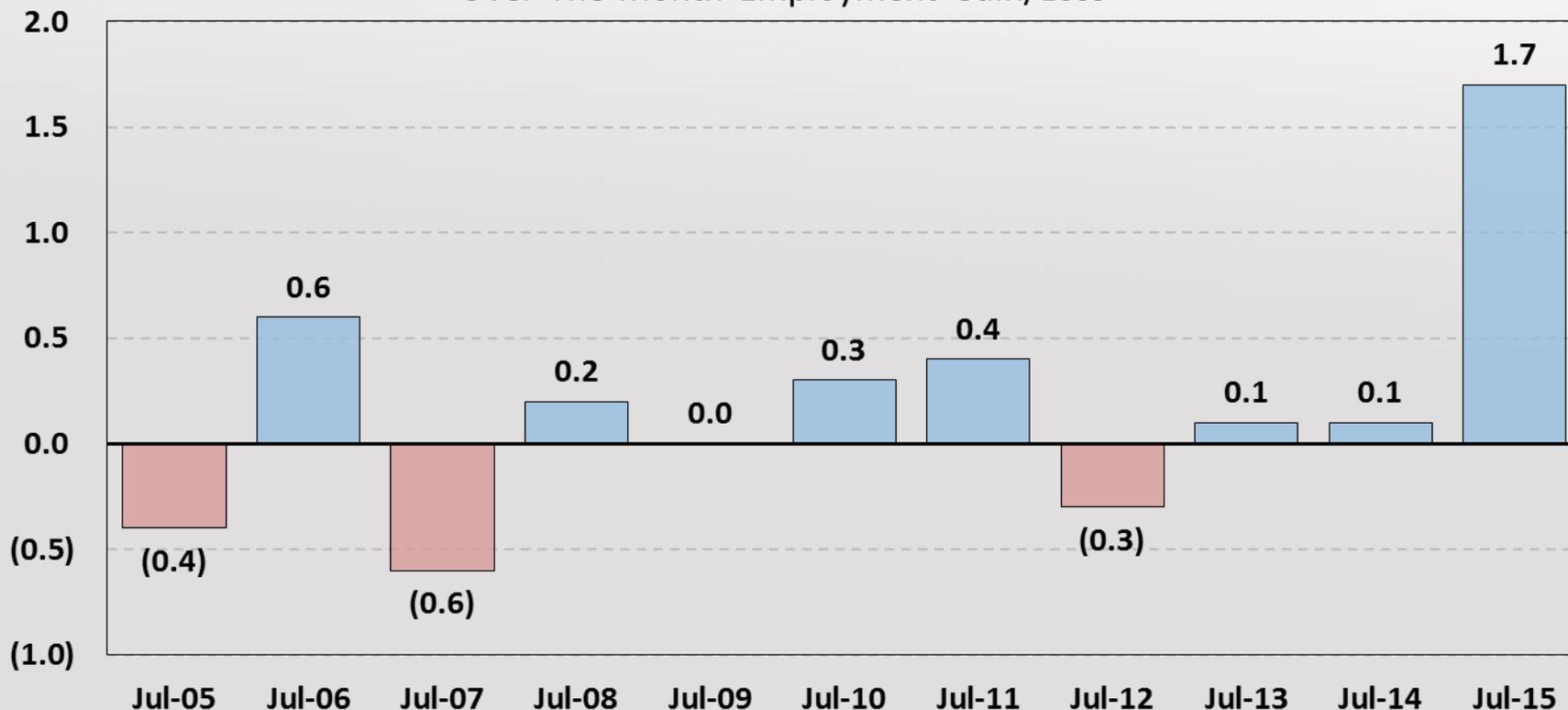
Source: Produced by the Arizona Office of Employment and Population Statistics in cooperation with the U.S. Dept. of Labor, Bureau of Labor Statistics

# Within Education & Health Svcs

## Health Care and Social Assistance

Over-The-Month Employment Gain/Loss

in thousands



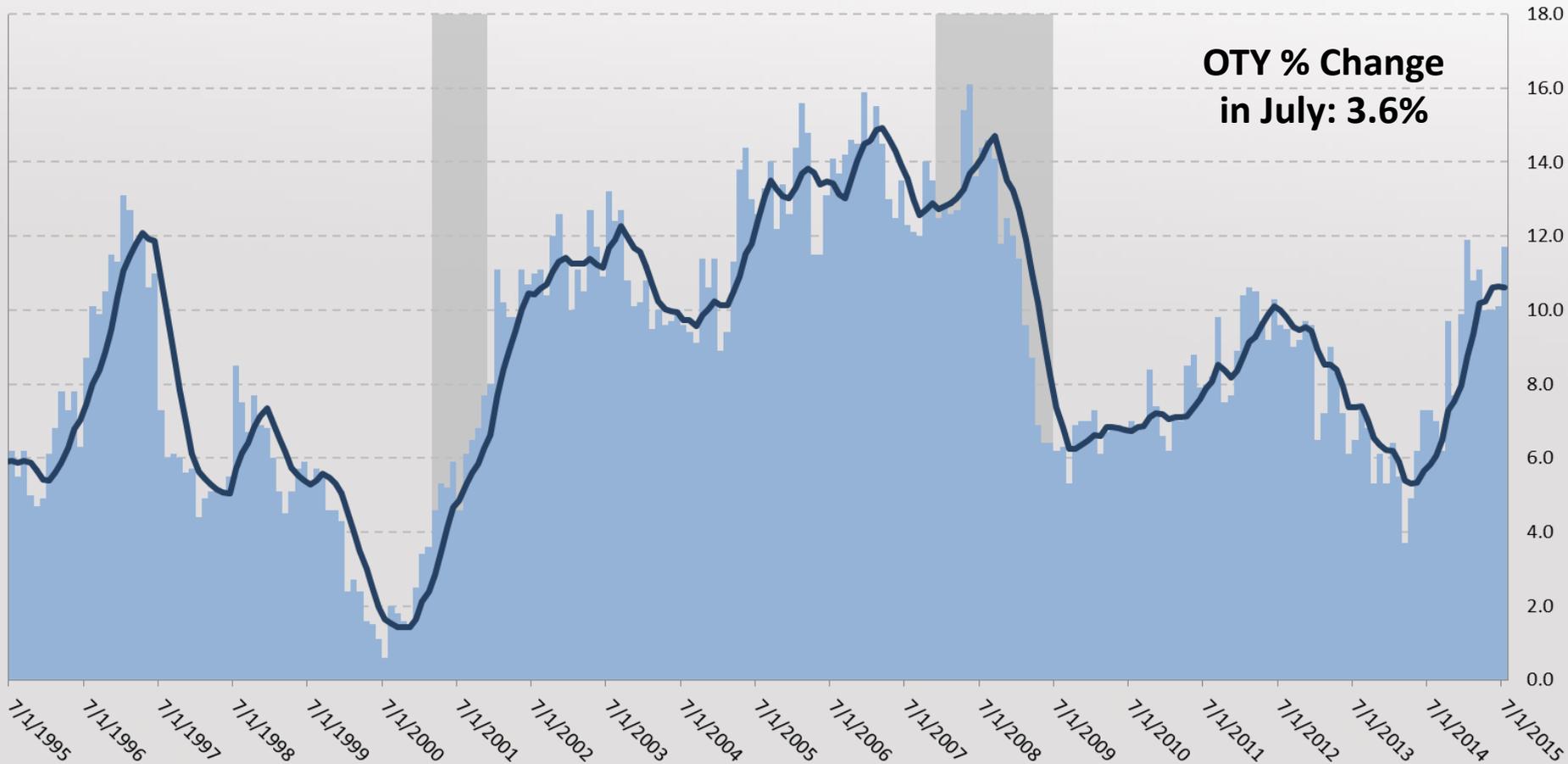
Post-Recession Average ('10-'14): 100 Jobs or 0.0%

Historic 10-Year Average ('05-'14): 0 Jobs or 0.0%

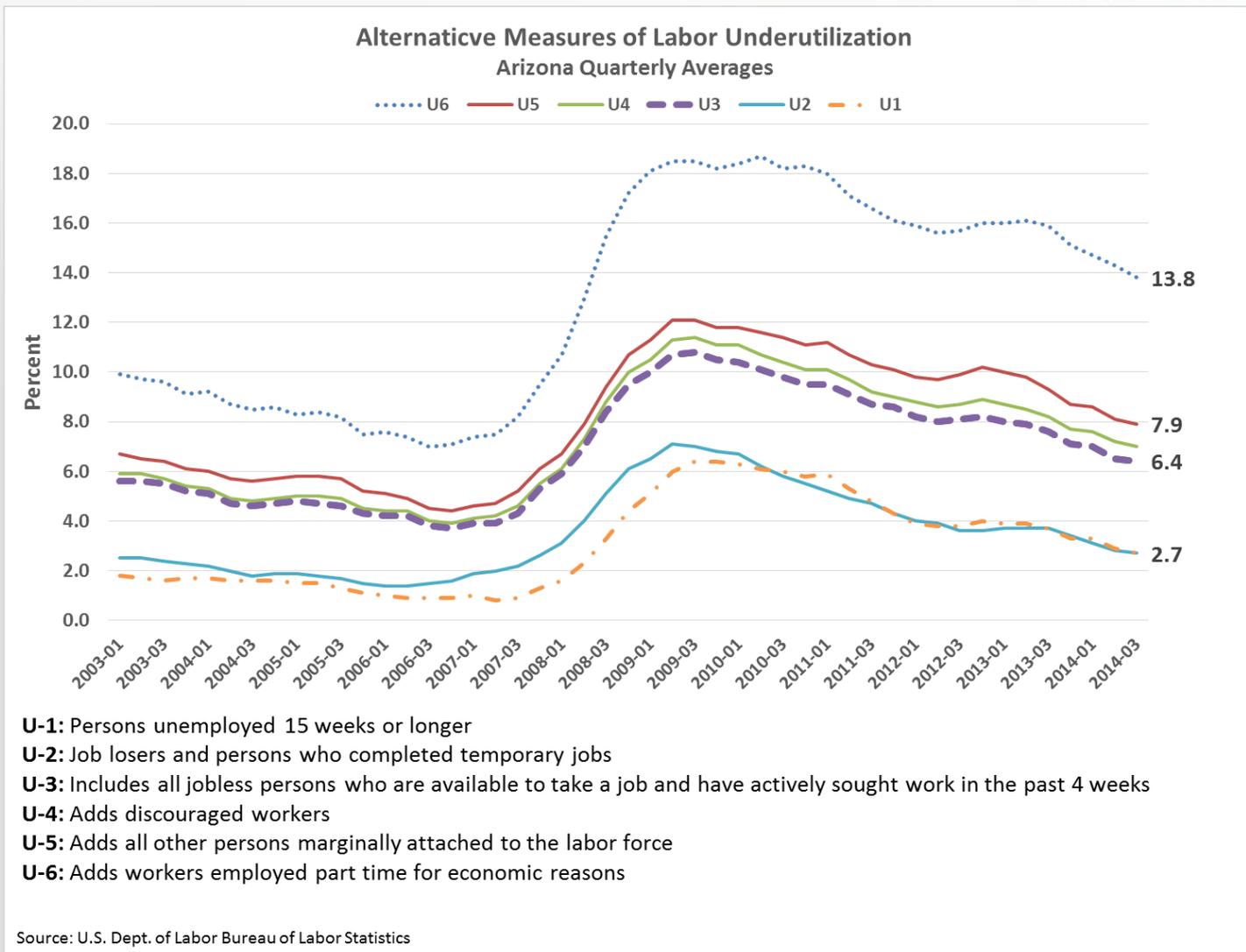
## Arizona Health Care & Social Assistance Over-the-Year Employment Change

Recession
  Health Care and Social Assistance
  6 per. Mov. Avg. (Health Care and Social Assistance)

in thousands



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



## Alternative Measures of Labor Underutilization

	2014 Q3 to 2015 Q2 Arizona	2014 Q3 to 2015 Q2 United States
U3	6.4%	5.7%
U4	7.0%	6.1%
U5	7.9%	7.0%
U6	13.8%	11.3%

*Source: Arizona DOA EPS in cooperation with U.S Dept. of Labor BLS*

## Alternative Measures of Labor Underutilization

	2014 Q3 to 2015 Q2 Arizona	2014 Q3 to 2015 Q2 United States	Difference
U3	6.4%	5.7%	0.7%
U4-U3	0.6%	0.4%	0.2%
U5-U4	0.9%	0.9%	0.0%
U6-U5	5.9%	4.3%	1.6%

*Source: Arizona DOA EPS in cooperation with U.S Dept. of Labor BLS*

Arizona has more people working part time who would like to be working full time than the U.S.  
 Arizona is closer to the national averages for discouraged and marginally attached workers

## Average Weekly Hours for All Employees

<b>SuperSector</b>	<b>2007</b>	<b>2014</b>	<b>Difference</b>
<b>Construction</b>	38.1	37.3	-0.8
<b>Manufacturing</b>	38.8	40.1	1.3
<b>TTU</b>	36.0	34.8	-1.2
<b>Financial Activities</b>	36.7	38.4	1.7
<b>PBS</b>	35.9	35.9	0.0
<b>EHS</b>	34.6	33.7	-0.9
<b>L&amp;H</b>	28.5	26.6	-1.9
<b>Other Services</b>	35.0	31.7	-3.3
<b>Total Private</b>	35.2	34.5	-0.7

*Source: Arizona DOA EPS in cooperation with U.S Dept. of Labor BLS*

# Thank You!

# Any Questions?

## Upcoming Release Schedule:

- August Employment Report on September 17
- September Employment Report on October 15