



INDIANA  
**WORKFORCE**  
DEVELOPMENT  
AND ITS **WorkOne** CENTERS

# Indiana's Employment and Labor Force Estimates February 2016

*3/22/2016*



# Key Points

- **Indiana total private employment growth was 6,900 over the month** making this the seventh month above the prior March 2000 peak. Now at 30,600 above that level, the new peak for private employment is 2,643,200 for Indiana. US private employment grew by 230,000 over the month, a rate of (0.2%).
- **Indiana private sector employment is up 46,800 from a year ago.** This is annual growth of 1.8% which is less than the national growth rate of 2.2% over the year. Over the month gains were strongest in Trade 6,900. Private Educational & Health Services saw gains of 4,500 over the month. Total Nonfarm gained 7,400. Construction saw gains of 300 over the month. Private Educational Services saw gains of 1,600 over the month. Trade, Transportation and Utilities saw gains of 5,000 over the month.

## Key sectors showing job decreases in February:

- Manufacturing saw declines of 2,600 over the month. Economic activity in the manufacturing sector contracted nationwide in February for the third consecutive month, while the overall economy grew for the 80th consecutive month. (the latest Manufacturing ISM index = 49.5)
- Professional & Business Service saw declines of 3,000 over the month.
- Financial Activities saw declines of 400 over the month.
- Average weekly hours for Indiana manufacturing decreased for the second month in a row from 41.9 to 41.2 in February. The two month change from December to January shows a drop of 1.9 hours. The National average also fell from 41.7 to 41.4 in February.
- Nationally in February, **average hourly earnings for all employees** on private nonfarm payrolls, at \$25.48, changed little (-5 cent), following no change in January. Over the year, average hourly earnings have risen by 2 percent. Average hourly earnings for all employees in Indiana fell by 23 cents from \$22.32 to \$23.09 in January, earnings have risen by 23 cents over the year in Indiana, a 1.0% increase.



# Key Points

## LAUS Household Survey:

- Indiana's February seasonally adjusted unemployment rate stands at 4.7%. This is a .1% increase from last month. Indiana's rate is down -0.5% from last year. Nationally the unemployment rate is 4.9%.
- Indiana's labor force gained 22,653 over the month, with gains in employment of 16,483. Unemployment estimates rose by 6,170. Indiana's Labor Force Participation rate increased by 0.4 to 64.6% over the month. This remains above the US Labor Force Participation rate which stands at 62.9%.
- **Indiana's Labor Force is up 73,033 over the year, and has gained 139,975 since January 2013.** Indiana's labor force stands at 3,323,187. Indiana's unemployment is down by 12,350 over the year, and 109,299 since January 2013.

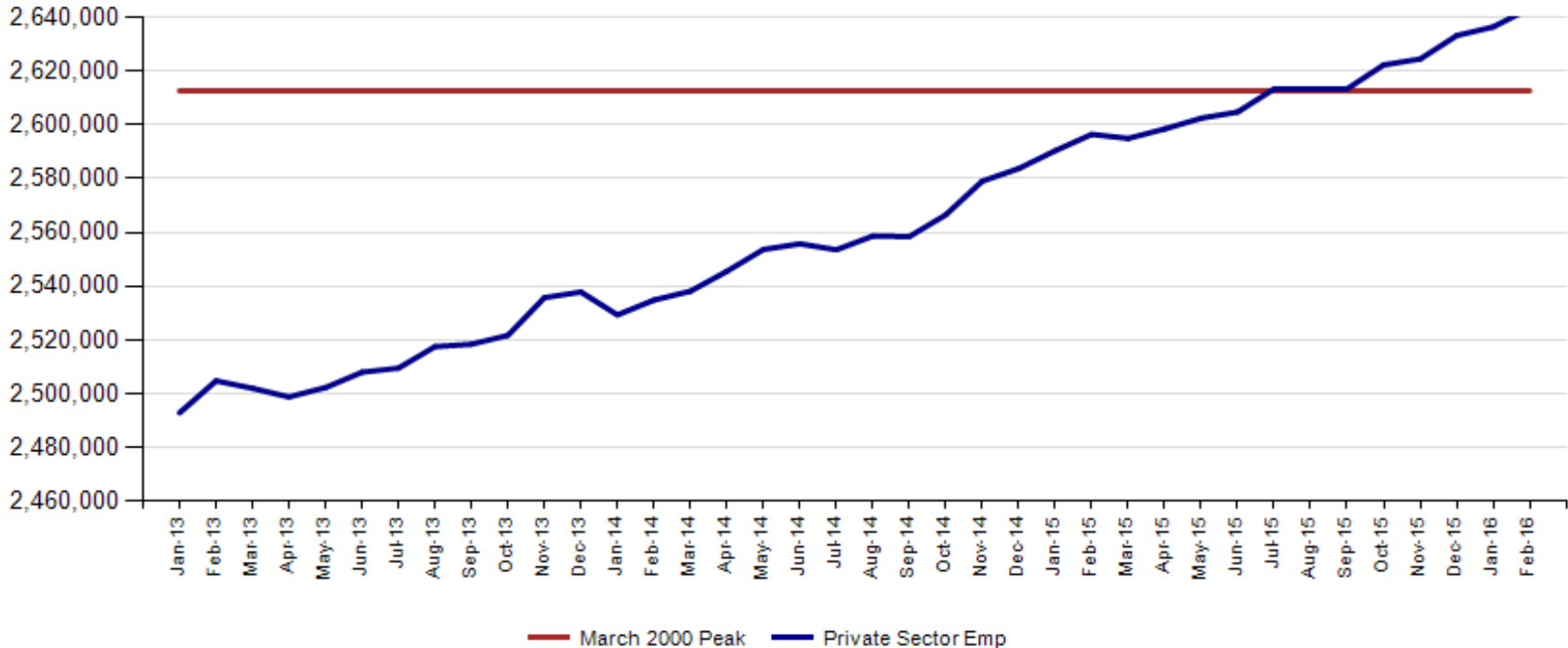
## CES Payroll/ Establishment Survey:

- Private employment is up 46,800 from a year ago (1.8%). US private employment grew by 2,597,000 over the month, a rate of (0.2%). Nationally, private sector employment is up by 2.2% over the year.
- Since January 2013 Indiana private employment has grown by 150,300 (6.0%). Private sector monthly job growth has averaged about 3,955 over the last three years.



Total nonfarm employment surpassed March 2000 peak levels in July of 2015 and this streak through February 2016. Private employment stands 20,800 above prior peak. Indiana's new private sector peak based on preliminary February numbers now stands at 2,643,200 which is 30,600 above the former high.

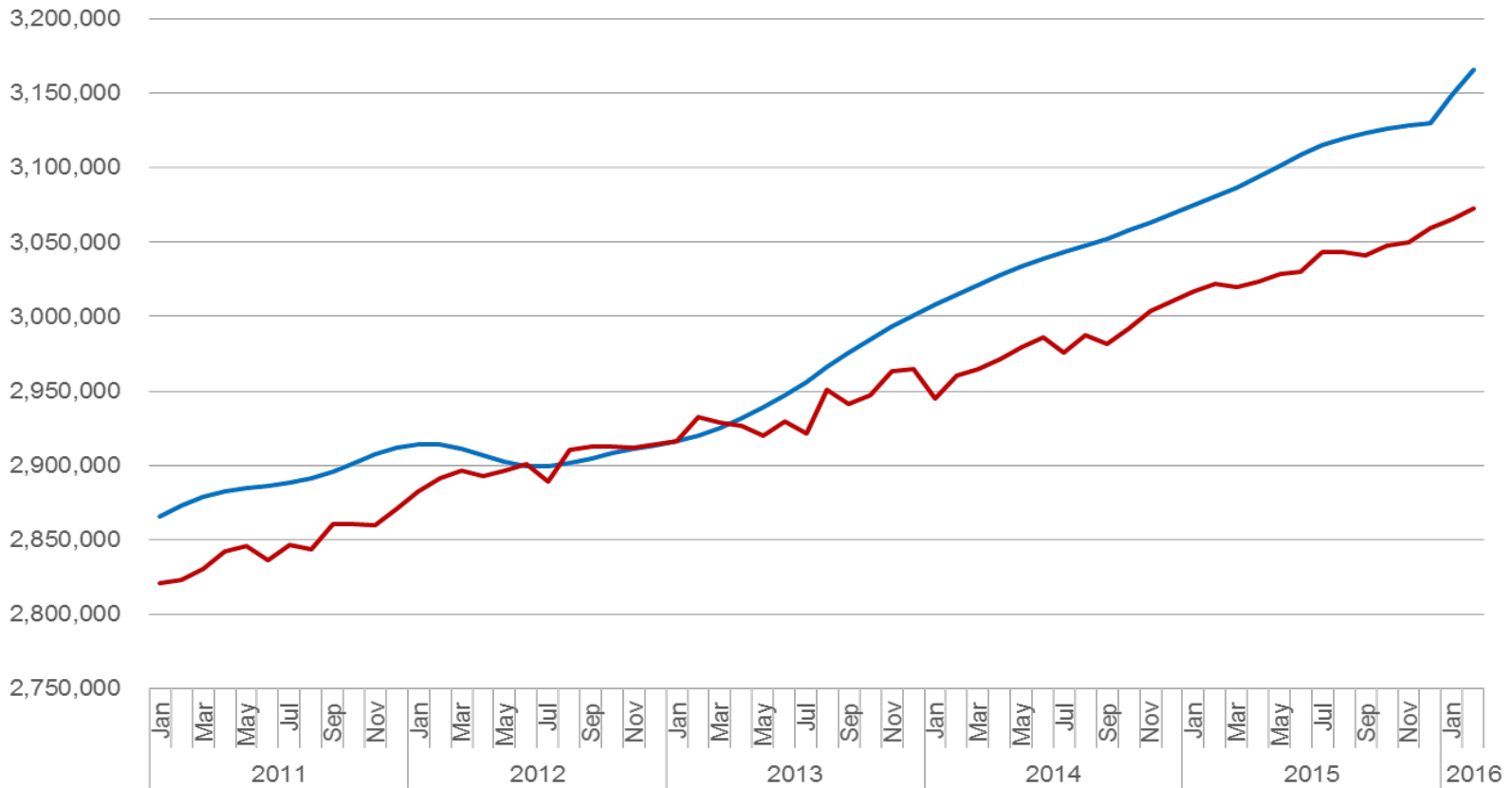
**Indiana Private Sector Employment**





LAUS estimates saw gains of over 16,483 in employment and 6,170 in unemployment increasing the Labor Force overall by 22,653. Employment gains in LAUS are outpacing total nonfarm gains in CES. The LAUS employment estimates include self-employed and agricultural workers.

**CES TNF and LAUS Employment, seasonally adjusted**





Indiana private sector employment gained 6,900 over the month and is up 46,800 over the year. Strongest gains over the year have been in Trade, Transportation and Warehousing, Private Educational and Health Services, and Leisure and Hospitality.

IN Employment Change Over the Month, Year-to-Date and Over the Year (seasonally adjusted)

Industry	February 2015	December 2015	January 2016	February 2016	Month Change	Y-to-D Change	Y-to-Y Change
Private Educational & Health Services	448.7	459.5	458.9	463.4	4.5	3.9	14.7
.....Private Educational Services	70.8	73.2	70.9	72.5	1.6	-0.7	1.7
.....Health Care & Social Assistance	377.9	386.3	388.0	390.9	2.9	4.6	13.0
Manufacturing	517.0	520.2	520.3	517.7	-2.6	-2.5	0.7
Professional & Business Services	327.7	327.9	326.3	323.3	-3.0	-4.6	-4.4
Financial Activities	129.8	131.3	132.9	132.5	-0.4	1.2	2.7
Construction	127.4	131.0	132.6	132.9	0.3	1.9	5.5
Leisure and Hospitality	299.2	304.6	308.5	309.8	1.3	5.2	10.6
Trade, Transportation & Utilities	579.5	592.9	591.0	596.0	5.0	3.1	16.5
.....Trade	440.7	447.6	446.2	453.1	6.9	5.5	12.4
.....Transportation, Warehousing & Utilities	138.8	145.3	144.8	142.9	-1.9	-2.4	4.1
All Other	167.1	165.7	165.8	167.6	1.8	1.9	0.5
Total Private	2,596.4	2,633.1	2,636.3	2,643.2	6.9	10.1	46.8
Government (Includes Public Schools & Hospitals)	425.4	426.6	429.1	429.6	0.5	3.0	4.2
Total Nonfarm	3,021.8	3,059.7	3,065.4	3,072.8	7.4	13.1	51.0
United States Total Private	118,921.0	121,106.0	121,288.0	121,518.0	230.0	412.0	2,597.0



February Total nonfarm is 55,600 over the March 2000 previous peak.  
Manufacturing sustained losses of 153,400 over this time frame.

IN Statewide Estimates (seasonally adjusted) -- February 2016

Supersector	Private Empl. Peak March 2000	Private Empl. Trough July 2009	January 2016	February 2016	Change Since Peak	Change Since Trough	Month to Month Change
Private Educational & Health Services	330.1	411.1	458.9	463.4	133.3	52.3	4.5
.....Private Educational Services	52.2	63.3	70.9	72.5	20.3	9.2	1.6
.....Health Care & Social Assistance	277.9	347.8	388.0	390.9	113.0	43.1	2.9
Manufacturing	671.1	427.9	520.3	517.7	-153.4	89.8	-2.6
Professional & Business Services	260.5	255.9	326.3	323.3	62.8	67.4	-3.0
Financial Activities	145.7	130.7	132.9	132.5	-13.2	1.8	-0.4
Construction	154.1	116.5	132.6	132.9	-21.2	16.4	0.3
Leisure and Hospitality	267.2	276.8	308.5	309.8	42.6	33.0	1.3
Trade, Transportation & Utilities	617.5	545.7	591.0	596.0	-21.5	50.3	5.0
.....Trade	485.1	421.6	446.2	453.1	-32.0	31.5	6.9
.....Transportation, Warehousing & Utilities	132.4	124.1	144.8	142.9	10.5	18.8	-1.9
All Other	166.4	158.6	165.8	167.6	1.2	9.0	1.8
Total Private	2,612.6	2,323.2	2,636.3	2,643.2	30.6	320.0	6.9
Government (Includes Public Schools & Hospitals)	404.6	434.5	429.1	429.6	25.0	-4.9	0.5
Total Nonfarm	3,017.2	2,757.7	3,065.4	3,072.8	55.6	315.1	7.4
United States Total Private	110,875.0	108,170.0	121,288.0	121,518.0	10,643.0	13,348.0	230.0



Indiana job growth over the year is slightly under the National trend in private sector gains for the third consecutive month. Indiana Manufacturing still is ahead of the US in year to year comparisons, but is down 500 years for the first two months of 2016. Leisure and Hospitality and Trade are stronger than the US over all three time frames.

### IN Employment Change Compared to the U.S.

Industry	Indiana Month to Month	U.S. Month to Month	Indiana vs U.S. Change	Indiana Year-to-Date	U.S. Year-to-Date	Indiana vs U.S. Change	Indiana Year-to-Year	U.S. Year-to-Year	Indiana vs U.S. Change
Private Educational & Health Services	1.0%	0.4%	OVER	0.8%	0.5%	OVER	3.3%	3.2%	OVER
.....Private Educational Services	2.3%	0.8%	OVER	-1.0%	0.2%	UNDER	2.4%	1.8%	OVER
.....Health Care & Social Assistance	0.7%	0.3%	OVER	1.2%	0.5%	OVER	3.4%	3.5%	UNDER
Manufacturing	-0.5%	-0.1%	UNDER	-0.5%	0.1%	UNDER	0.1%	0.1%	OVER
Professional & Business Services	-0.9%	0.1%	UNDER	-1.4%	0.2%	UNDER	-1.3%	3.1%	UNDER
Financial Activities	-0.3%	0.1%	UNDER	0.9%	0.3%	OVER	2.1%	1.8%	OVER
Construction	0.2%	0.3%	UNDER	1.5%	0.5%	OVER	4.3%	4.0%	OVER
Leisure and Hospitality	0.4%	0.3%	OVER	1.7%	0.6%	OVER	3.5%	3.0%	OVER
Trade, Transportation & Utilities	0.8%	0.2%	OVER	0.5%	0.4%	OVER	2.8%	1.8%	OVER
.....Trade	1.5%	0.3%	OVER	1.2%	0.6%	OVER	2.8%	1.8%	OVER
.....Transportation, Warehousing & Utils	-1.3%	-0.1%	UNDER	-1.7%	-0.4%	UNDER	3.0%	1.5%	OVER
All Other	1.1%	0.1%	OVER	1.1%	0.0%	OVER	0.3%	-0.4%	OVER
Total Private	0.3%	0.2%	OVER	0.4%	0.3%	OVER	1.8%	2.2%	UNDER
Government (Includes Public Schools & Hospitals)	0.1%	0.1%	OVER	0.7%	0.0%	OVER	1.0%	0.3%	OVER
Total Nonfarm	0.2%	0.2%	OVER	0.4%	0.3%	OVER	1.7%	1.9%	UNDER





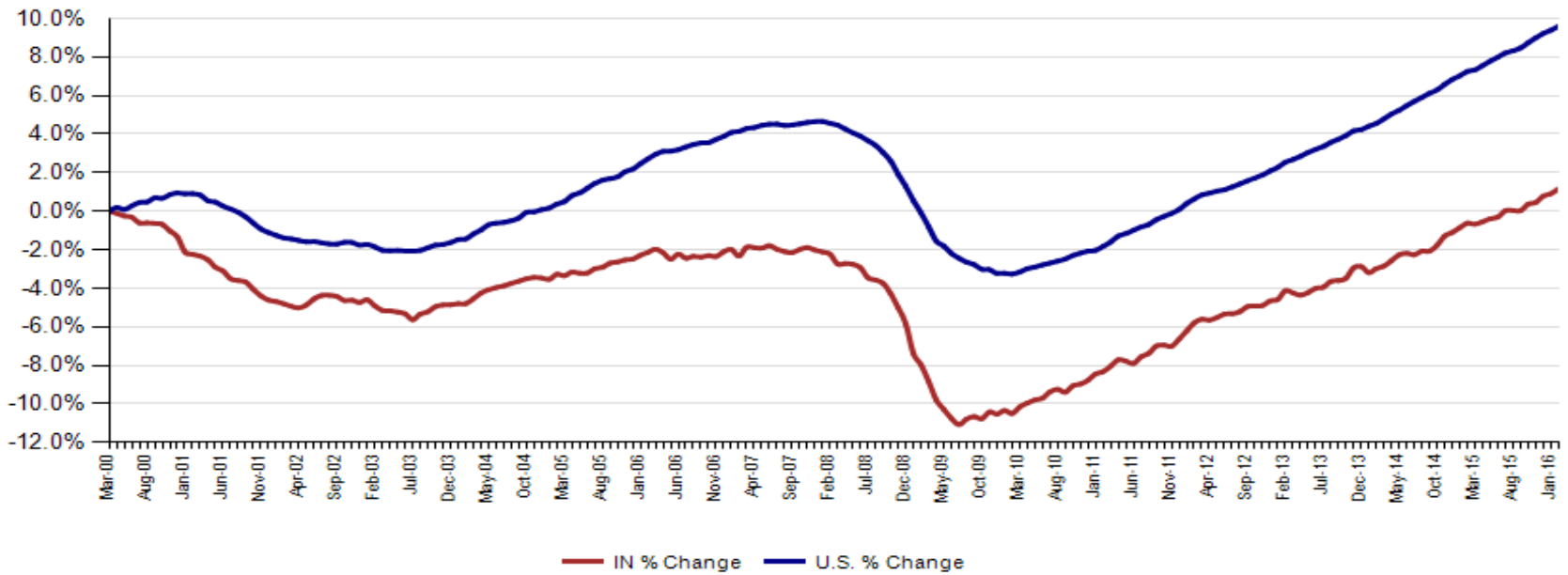
January Total Private preliminary estimates were revised up by 2,500 and the increase from December to January was 3,200 over the month.

Revisions to January 2016 Estimates						
INDUSTRY TITLE	Dec	Jan Prel	Jan Rev	Revision	Chg from Dec	Prel Chg from Dec
Total Nonfarm	3059.7	3062.3	3065.4	3.1	5.7	2.6
Total Private	2633.1	2633.8	2636.3	2.5	3.2	0.7
Goods Producing	657.7	658.5	659.3	0.8	1.6	0.8
Service-Providing	2402.0	2403.8	2406.1	2.3	4.1	1.8
Private Service Providing	1975.4	1975.3	1977.0	1.7	1.6	-0.1
Construction	131.0	132.2	132.6	0.4	1.6	1.2
Manufacturing	520.2	519.9	520.3	0.4	0.1	-0.3
Trade, Transportation, and Utilities	592.9	590.6	591.0	0.4	-1.9	-2.3
Information	33.2	32.7	32.6	-0.1	-0.6	-0.5
Financial Activities	131.3	132.8	132.9	0.1	1.6	1.5
Finance and Insurance	96.9	96.6	96.8	0.2	-0.1	-0.3
Real Estate and Rental and Leasing	34.4	36.2	36.1	-0.1	1.7	1.8
Professional and Business Services	327.9	324.8	326.3	1.5	-1.6	-3.1
Admin & Support & Waste Mgmt & Remediation Services	184.8	182.0	182.1	0.1	-2.7	-2.8
Education and Health Services	459.5	457.9	458.9	1.0	-0.6	-1.6
Leisure and Hospitality	304.6	309.3	308.5	-0.8	3.9	4.7
Other Services	126.0	127.2	126.8	-0.4	0.8	1.2
Government	426.6	428.5	429.1	0.6	2.5	1.9



Since Indiana's high point of employment (March 2000), private sector employment growth in Indiana has lagged the U.S. (1.2% growth vs. 9.644% nationally).

**Private Sector Job Growth Since the Peak of Employment in Indiana**



Source: Current Employment Statistics, seasonally adjusted



## Midwest Comparison Rates: Seasonally Adjusted Over the Year and Over the Month (**confidential and preliminary**)

	<b>February 2015</b>	<b>January 2016</b>	<b>February 2016</b>	<b>Monthly change</b>	<b>Yearly change</b>
Indiana	5.2%	4.6%	4.7%	0.1%	-0.5%
U.S.	5.5%	4.9%	4.9%	0.0%	-0.6%
Illinois	6.0%	6.3%			
Kentucky	5.3%	5.8%	5.8%	0.0%	0.5%
Michigan	5.9%	4.9%	4.8%	-0.1%	-1.1%
Ohio	5.1%	4.9%	4.9%	0.0%	-0.2%
Wisconsin	4.7%	4.6%	4.6%	0.0%	-0.1%

There have been increases in the Labor Force over from February 2015 and the Labor Force Participation Rate has continued to increase over this time.

	Labor Force	Month to Month	Employment	Month to Month	Unemployment	Month to Month	Rate	Labor Force Participation Rate
Feb-15	3,250,154	1,260	3,080,372	5,765	169,782	(4,505)	5.2	63.6
Mar-15	3,251,866	1,712	3,086,797	6,425	165,069	(4,713)	5.1	63.6
Apr-15	3,254,461	2,595	3,093,904	7,107	160,557	(4,512)	4.9	63.6
May-15	3,257,976	3,515	3,101,411	7,507	156,565	(3,992)	4.8	63.6
Jun-15	3,261,942	3,966	3,108,736	7,325	153,206	(3,359)	4.7	63.7
Jul-15	3,265,809	3,867	3,115,107	6,371	150,702	(2,504)	4.6	63.7
Aug-15	3,269,063	3,254	3,119,921	4,814	149,142	(1,560)	4.6	63.7
Sep-15	3,271,886	2,823	3,123,418	3,497	148,468	(674)	4.5	63.8
Oct-15	3,274,691	2,805	3,126,259	2,841	148,432	(36)	4.5	63.8
Nov-15	3,277,175	2,484	3,128,500	2,241	148,675	243	4.5	63.8
Dec-15	3,279,479	2,304	3,130,073	1,573	149,406	731	4.6	63.8
Jan-16	3,300,534	21,055	3,149,272	19,199	151,262	1,856	4.6	64.2
Feb-16	3,323,187	22,653	3,165,755	16,483	157,432	6,170	4.7	64.6

Two Month Change

Dec 2015 to Feb 2016	43,708	35,682	8,026
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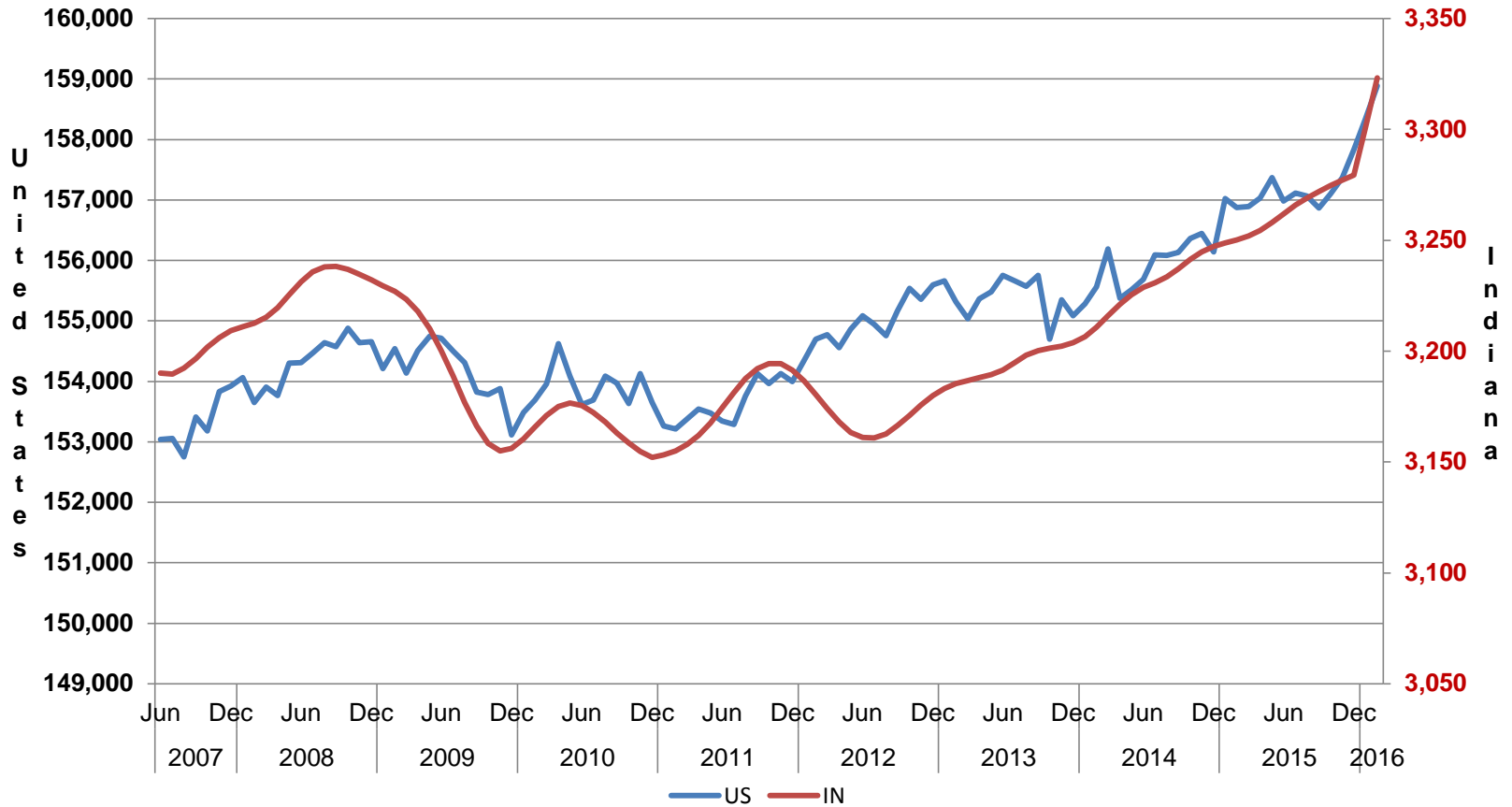
Yr to Yr Chg

Feb 2015 to Feb 2016	73,033	85,383	(12,350)
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Source: Current Employment Statistics, seasonally adjusted



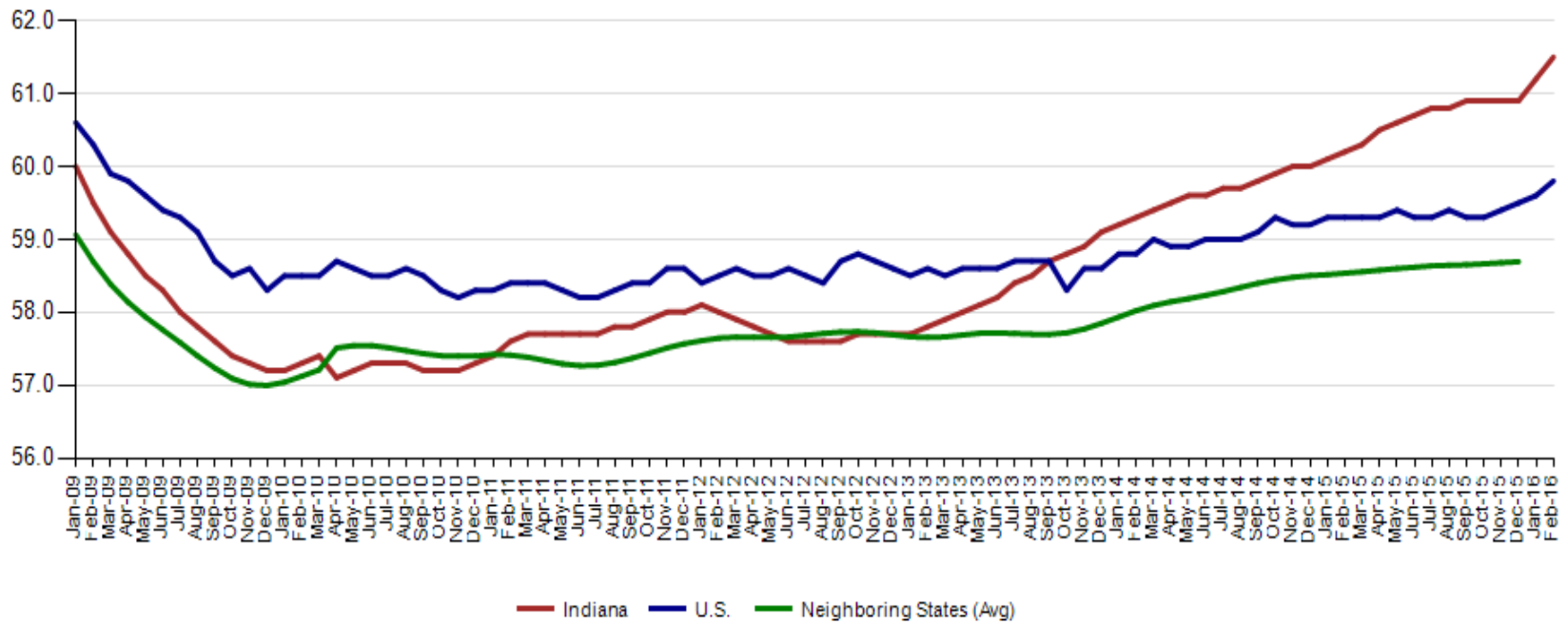
## Indiana & U.S. Labor Force, 2007-2016 (in 1000s)





Indiana's employment to population ratio increased by 0.3 to 61.5 in February. This is an increase of 1.3 over the year. The US employment to population rate increased by 0.2 to 59.8 in February. The US employment to population rate increased by 0.2 to 59.8 in February.

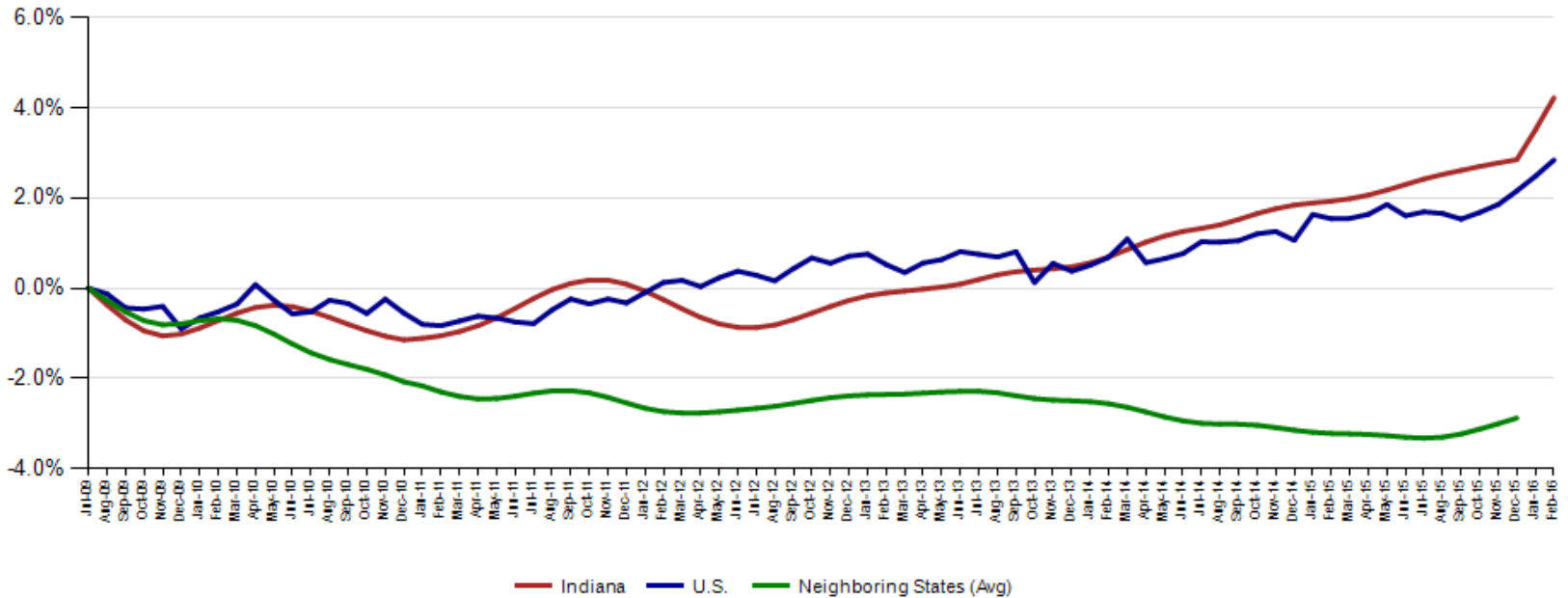
**Employment to Population Ratio (seasonally adjusted)**



Source: Local Area Unemployment Statistics

Since the low point of employment in July 2009, Indiana's Labor Force has grown by 4.2% compared to the US growth of 2.8%.

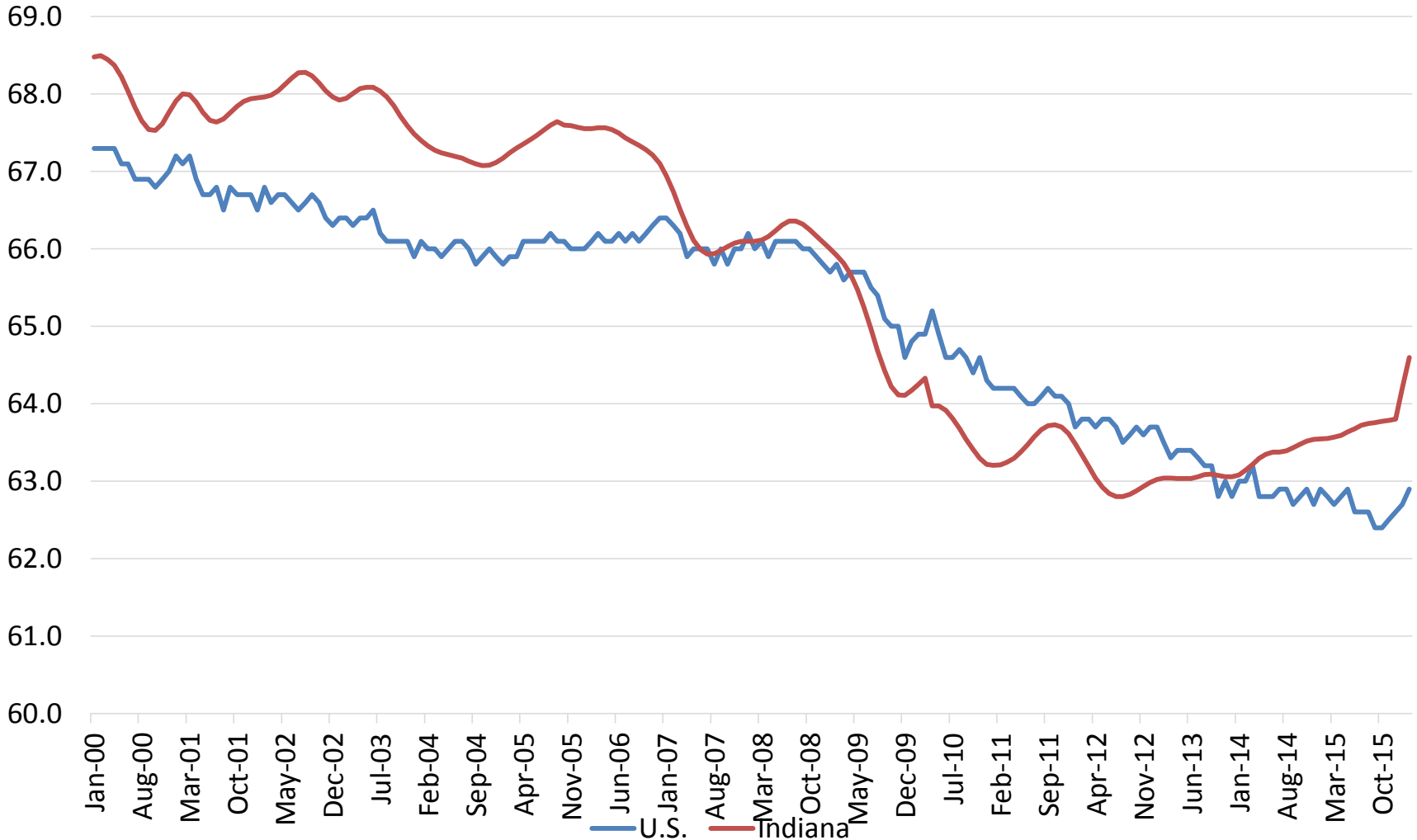
**Labor Force Change Since July 2009 Indiana Trough (seasonally adjusted)**



Source: Current Employment Statistics, seasonally adjusted



Indiana's Labor Force is up 73,033 over the year, and has gained 139,975 since January 2013. Indiana's labor force stands at 3,323,187. The labor force participation rate now stands at 64.6. This is the highest this as been since August 2009. This is still 3.8 below the 2000 LFP of 68.4.





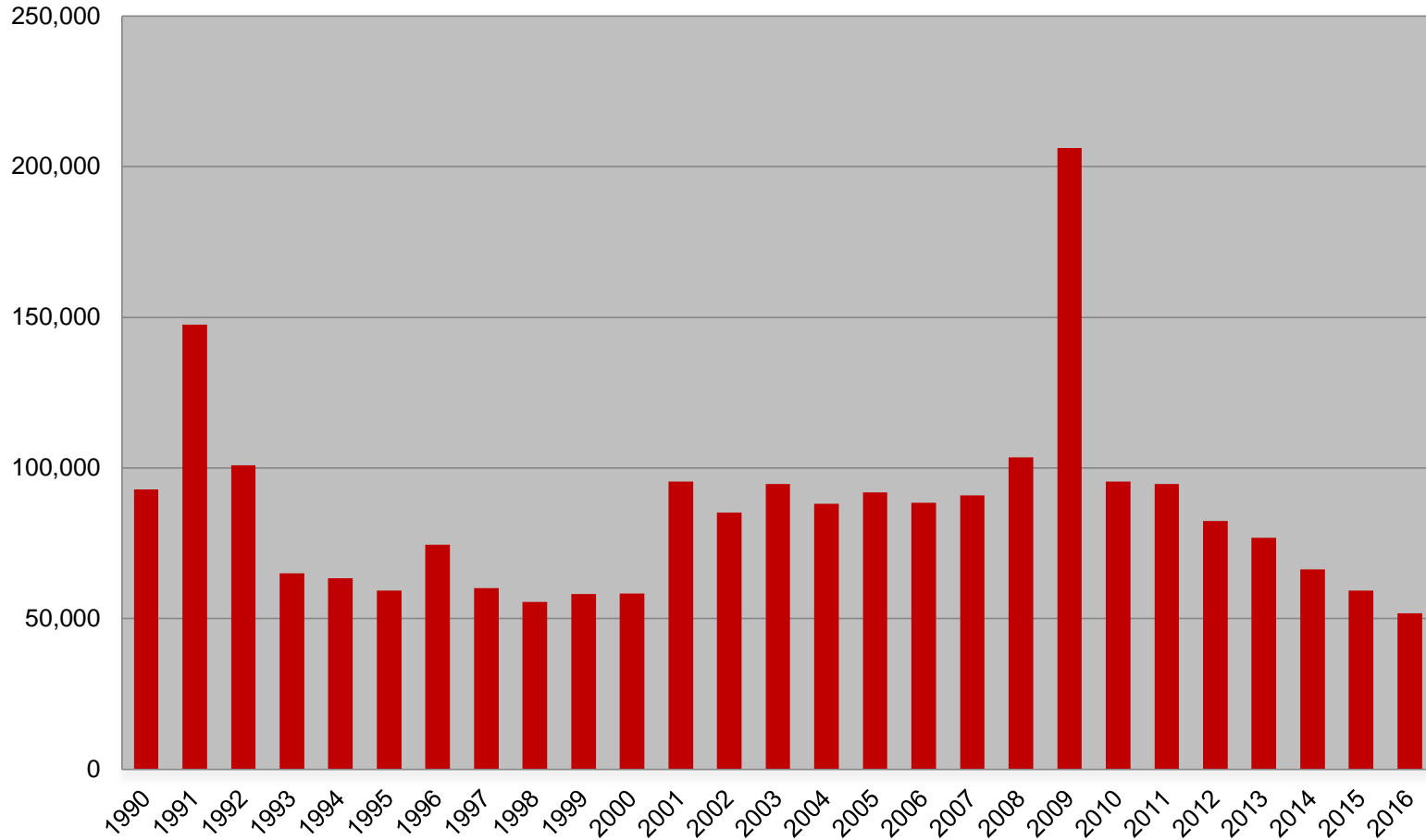


## CPS Factor Movements 5 year average

	Job Losers	Temp Layoff	Perm Layoff	Entrants	Not in LF	Not in LF 16-24	Ag Work	Self Emp	Unemp	Emp	Pop
Year Ago	89.9	23.1	33.3	66.4	1936.8	367.3	81.0	121.0	181.9	2999.5	5118.1
Prev Mo	78.2	26.3	38.3	69.2	1832.6	351.5	44.0	125.8	167.8	3142.3	5142.7
Current Mo	117.6	22.0	59.5	72.7	1858.8	336.3	45.4	138.6	202.8	3083.3	5144.9
Month Chg	39.4	4.3	21.2	3.5	26.2	15.2	1.3	12.9	35.0	59.0	2.2
5-Yr Avg Chg	12.8	9.3	6.2	6.8	13.4	10.2	2.7	1.9	17.6	6.7	2.5
Year Chg	27.7	1.1	26.2	6.3	78.0	31.0	35.6	17.7	20.9	83.8	26.8



## Weekly Initial Claims – 11 weeks aggregate





# Regular UI Claims – Reference Week (12<sup>th</sup> of the month) Input to LAUS Unemployment Rate Model Declines over the month - and over the year

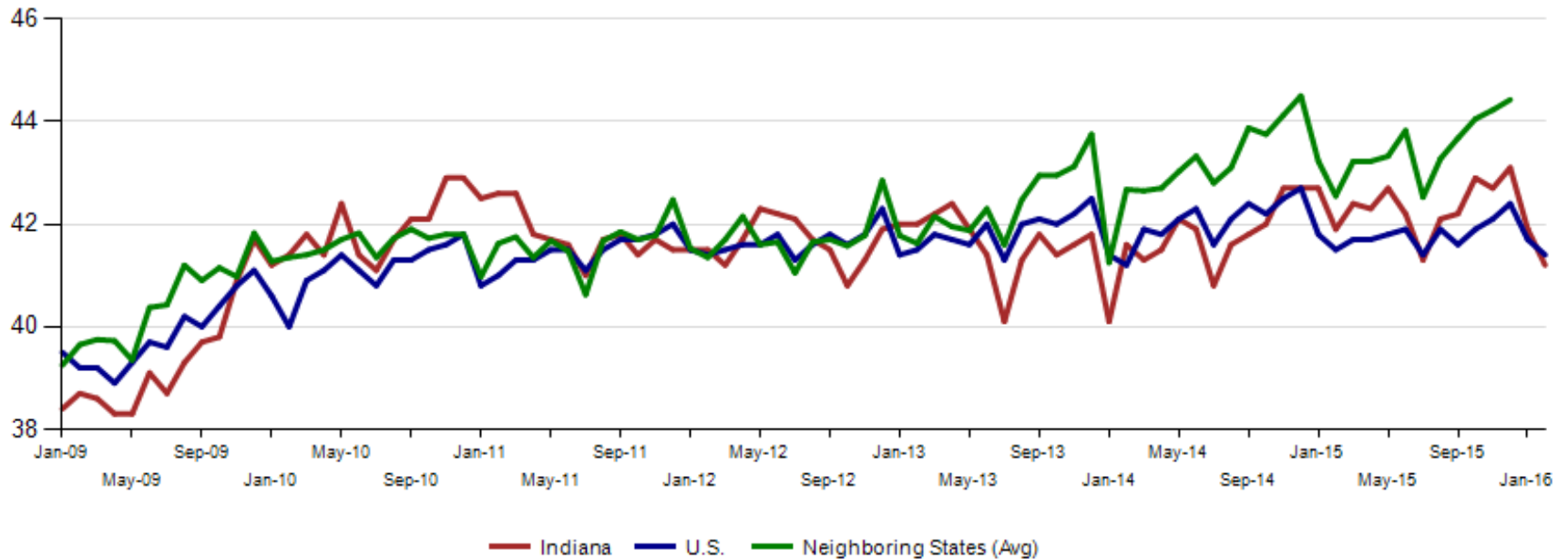
## Without earnings – Reference week claims

	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	OTM Change	OTY Change
JANUARY	65,898	71,296	75,294	150,888	105,910	84,706	71,042	63,223	49,377	41,333	36,555	10,306	(4,778)
FEBRUARY	67,347	75,432	78,068	154,388	103,432	80,852	69,570	60,183	52,316	39,282	36,483	(72)	(2,799)
MARCH	59,716	64,936	74,759	157,257	93,469	71,696	60,752	54,578	45,928	35,755			
APRIL	48,103	53,325	64,948	143,842	74,481	59,036	51,652	48,548	39,717	25,597			
MAY	46,779	46,002	55,480	141,174	66,779	54,680	46,328	42,997	32,460	22,807			
JUNE	45,533	46,350	57,228	136,670	67,996	55,021	46,820	41,722	29,524	22,030			
JULY	53,424	51,141	72,032	121,336	69,447	58,031	47,268	44,597	30,845	22,341			
AUGUST	45,021	43,887	61,985	103,509	62,976	51,710	42,134	39,998	26,061	21,472			
SEPTEMBER	41,247	42,500	61,548	92,680	58,280	46,824	41,955	39,563	23,685	20,941			
OCTOBER	42,487	42,313	67,306	86,275	58,317	46,909	39,467	37,778	23,768	19,917			
NOVEMBER	43,868	45,362	81,466	82,451	58,846	51,201	41,018	38,517	25,315	21,199			
DECEMBER	53,566	54,201	109,651	91,814	65,279	55,104	46,371	42,484	30,982	26,249			



Average weekly hours for Indiana manufacturing fell for the second month in a row from 41.9 to 41.2 in February. The two month change from December to January shows a drop of 1.9 hours. The National average also fell from 41.7 to 41.4 in February.

**Avg. Weekly Manufacturing Production Hours (non seasonally adjusted)**





February Internal Indiana Career Connect job orders have increased 64% over the year. Health care and retail trade are the industries with the most ads each month.

Industry	Feb-2016	Prior Year			Current Year			Change over Prior Year			Current Year Including External			Current Duration (days)
	December	January	February	December	January	February	December	January	February	December	January	February	February	
<b>Total</b>	<b>3,888</b>	<b>4,929</b>	<b>5,603</b>	<b>7,246</b>	<b>8,346</b>	<b>9,177</b>	<b>86%</b>	<b>69%</b>	<b>64%</b>	<b>54,527</b>	<b>53,676</b>	<b>56,847</b>	<b>51</b>	
<b>Health Care and Social Services</b>	845	1,090	1,117	1,854	1,893	1,832	119%	74%	64%	10,604	10,285	10,009	41	
<b>Retail Trade</b>	245	350	290	715	701	694	192%	100%	139%	8,135	7,268	8,845	42	
<b>Admin. &amp; Support &amp; Waste Mgt. &amp; Rem. Services</b>	461	717	765	926	1,221	1,258	101%	70%	64%	7,348	7,535	7,940	49	
<b>Manufacturing</b>	793	985	1,079	1,309	1,621	1,656	65%	65%	53%	3,689	4,166	4,427	52	
<b>Accommodation and Food Services</b>	86	128	386	192	143	178	123%	12%	-54%	3,058	2,735	3,935	63	
<b>Transportation &amp; Warehousing</b>	218	283	387	363	464	345	67%	64%	-11%	6,539	4,113	3,474	64	
<b>Educational Services</b>	79	154	117	126	98	848	59%	-36%	625%	1,883	2,191	3,409	32	
<b>Professional, Scientific, and Technical Services</b>	266	283	274	466	615	733	75%	117%	168%	2,624	2,953	3,051	65	
<b>Finance and Insurance</b>	178	177	239	198	254	209	11%	44%	-13%	2,733	3,122	2,740	115	
<b>Wholesale Trade</b>	144	159	192	322	330	342	124%	108%	78%	1,669	1,648	1,822	40	
<b>Information</b>	88	79	122	205	219	229	133%	177%	88%	1,627	1,627	1,648	42	
<b>Public Administration</b>	85	101	129	146	211	157	72%	109%	22%	1,511	1,570	1,470	72	
<b>Other Services(Except Public Administration)</b>	118	113	165	124	151	163	5%	34%	-1%	999	1,381	1,208	101	
<b>Management of Companies and Enterprises</b>	5	6	9	19	32	26	280%	433%	189%	759	1,234	993	62	
<b>Real Estate and Rental and Leasing</b>	48	43	65	85	93	101	77%	116%	55%	759	812	692	60	
<b>Construction</b>	120	144	137	99	155	207	-18%	8%	51%	274	540	602	69	
<b>Utilities</b>	58	48	44	56	93	80	-3%	94%	82%	184	286	245	47	
<b>Arts, Entertainment, and Recreation</b>	13	20	28	12	17	41	-8%	-15%	46%	59	138	167	49	
<b>Mining</b>	10	14	6	6	3	34	-40%	-79%	467%	34	20	82	20	
<b>Agriculture, Forestry, Fishing and Hunting</b>	13	26	32	14	21	34	8%	-19%	6%	30	41	78	75	
<b>Unallocated</b>	15	9	20	9	11	10	-40%	22%	-50%	9	11	10	159	



## February Indiana Career Connect Job Orders, and New Applicants

