



INDIANA
WORKFORCE
DEVELOPMENT
AND ITS **WorkOne** CENTERS

Indiana's Employment and Labor Force Estimates July 2016

08/17/2016



Key Points

Headline Points

- Indiana's Labor Force increased 3,796 over the month, with an increase in employment of 11,276. Unemployment decreased by 7,480.
- Indiana's Labor Force increased 109,754 over the year, and has increased 192,351 since January 2013.
- Indiana's rate has remained consistent over the year from July 2015, standing at 4.6.
- Total private employment stands at 30,000 above the March 2000 Peak.
- Private employment is up 149,700 since January 2013.



Key Points

The Indiana Unemployment Rate stands at 4.6% in July 2016.

Nationally the rate is 4.9%.

- Indiana's rate has remained consistent over the year from July 2015, standing at 4.6.
- Indiana's Labor Force increased 3,796 over the month, with an increase in employment of 11,276. Unemployment decreased by 7,480.
- Indiana's Labor Force increased 75,029 with 70,735 in employment and 4,294 in unemployment since the start of the year.
- Indiana's Labor Force increased 109,754 over the year, and has increased 192,351 since January 2013.
- Indiana's Labor Force Participation rate remained at 65.4% over the month. This remains above the US Labor Force Participation rate which stands at 62.8.



Key Points

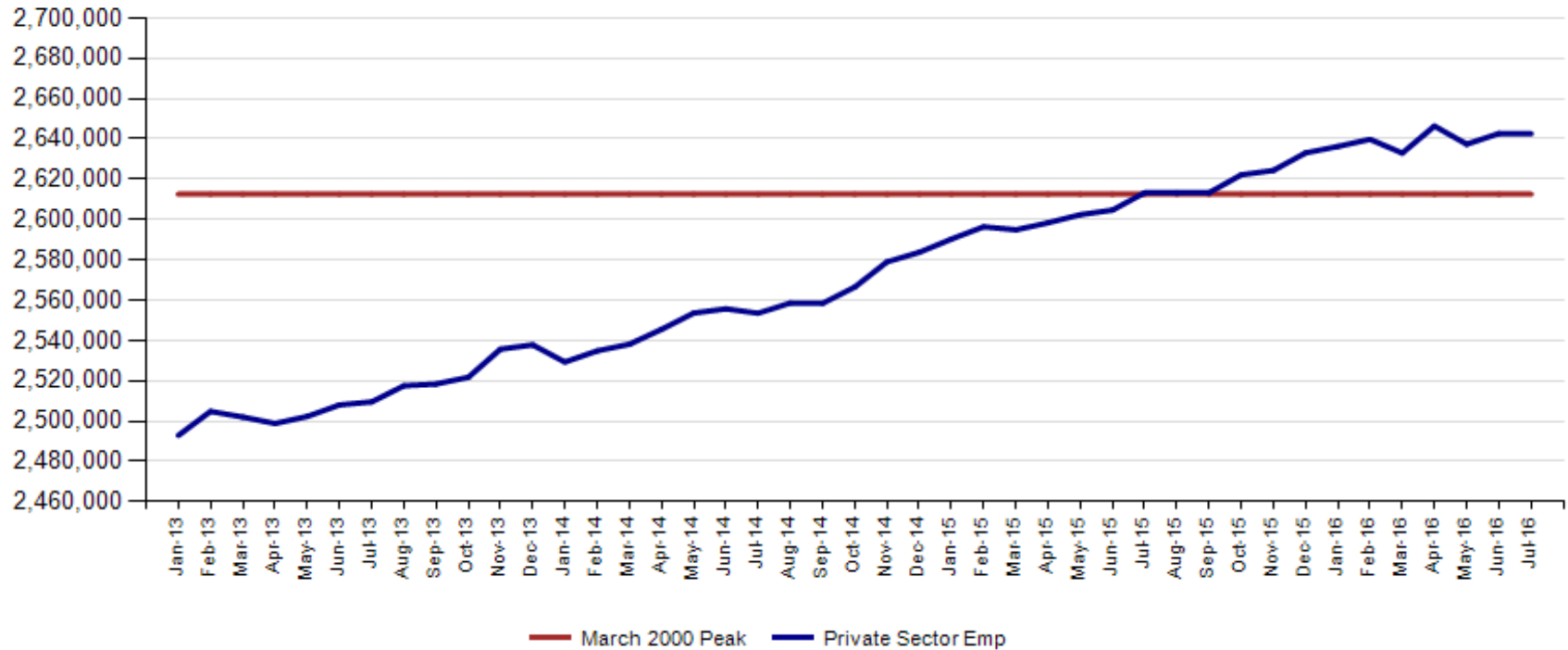
Total private employment stands at 30,000 above the March 2000 Peak. This is the 13th month above the prior peak.

- **Indiana private employment now stands at 2,642,600.**
- **Professional & Business Services had gains of 2,000.**
- **The All Other category had gains of 1,200.**
- **Manufacturing had gains of 400.**
- **Financial Activities were flat over the month.**
- **Leisure and Hospitality had declines of 2,100.**
- **Trade, Transportation & Utilities had declines of 1,500.**
- **Construction had declines of 800.**



July Total private employment stands at 30,000 above the March 2000 Peak.
This is the 13th month above the prior peak.

Indiana Private Sector Employment





June Indiana private sector employment decreased by 100 jobs over the month but is still up 29,300 over the year. Professional & Business Services jobs increased by 2,000 jobs for the largest over the month gain. Leisure and Hospitality saw the largest decline of -2,100 jobs over the month.

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

Industry	July 2015	December 2015	June 2016	July 2016	Month Change	Y-to-D Change	Y-to-Y Change
Private Educational & Health Services	455.2	459.5	470.4	471.1	0.7	11.6	15.9
.....Private Educational Services	72.9	73.2	72.9	75.6	2.7	2.4	2.7
.....Health Care & Social Assistance	382.3	386.3	397.5	395.5	-2.0	9.2	13.2
Manufacturing	521.1	520.2	515.5	515.9	0.4	-4.3	-5.2
Professional & Business Services	330.7	327.9	319.6	321.6	2.0	-6.3	-9.1
Financial Activities	130.8	131.3	132.1	132.1	0.0	0.8	1.3
Construction	124.9	131.0	133.1	132.3	-0.8	1.3	7.4
Leisure and Hospitality	301.0	304.6	307.0	304.9	-2.1	0.3	3.9
Trade, Transportation & Utilities	582.5	592.9	602.1	600.6	-1.5	7.7	18.1
.....Trade	443.3	447.6	459.6	458.8	-0.8	11.2	15.5
.....Transportation, Warehousing & Utilities	139.2	145.3	142.5	141.8	-0.7	-3.5	2.6
All Other	167.1	165.7	162.9	164.1	1.2	-1.6	-3.0
Total Private	2,613.3	2,633.1	2,642.7	2,642.6	-0.1	9.5	29.3
Government (Includes Public Schools & Hospitals)	429.7	426.6	416.7	428.8	12.1	2.2	-0.9
Total Nonfarm	3,043.0	3,059.7	3,059.4	3,071.4	12.0	11.7	28.4
United States Total Private	119,979.0	121,106.0	122,055.0	122,272.0	217.0	1,166.0	2,293.0



Total nonfarm is 54,200 over the March 2000 peak. Private Education gained 2,700 and Professional & Business Services gained 2,000 over the month. Manufacturing gained 400 jobs in July, but Construction lost 800 at the same time. Manufacturing and Construction show combined losses of 177,000 since the March 2000 peak.

IN Statewide Estimates (seasonally adjusted) -- July 2016

Supersector	Private Empl. Peak March 2000	Private Empl. Trough July 2009	June 2016	July 2016	Change Since Peak	Change Since Trough	Month to Month Change
Private Educational & Health Services	330.1	411.1	470.4	471.1	141.0	60.0	0.7
.....Private Educational Services	52.2	63.3	72.9	75.6	23.4	12.3	2.7
.....Health Care & Social Assistance	277.9	347.8	397.5	395.5	117.6	47.7	-2.0
Manufacturing	671.1	427.9	515.5	515.9	-155.2	88.0	0.4
Professional & Business Services	260.5	255.9	319.6	321.6	61.1	65.7	2.0
Financial Activities	145.7	130.7	132.1	132.1	-13.6	1.4	0.0
Construction	154.1	116.5	133.1	132.3	-21.8	15.8	-0.8
Leisure and Hospitality	267.2	276.8	307.0	304.9	37.7	28.1	-2.1
Trade, Transportation & Utilities	617.5	545.7	602.1	600.6	-16.9	54.9	-1.5
.....Trade	485.1	421.6	459.6	458.8	-26.3	37.2	-0.8
.....Transportation, Warehousing & Utilities	132.4	124.1	142.5	141.8	9.4	17.7	-0.7
All Other	166.4	158.6	162.9	164.1	-2.3	5.5	1.2
Total Private	2,612.6	2,323.2	2,642.7	2,642.6	30.0	319.4	-0.1
Government (Includes Public Schools & Hospitals)	404.6	434.5	416.7	428.8	24.2	-5.7	12.1
Total Nonfarm	3,017.2	2,757.7	3,059.4	3,071.4	54.2	313.7	12.0
United States Total Private	110,875.0	108,170.0	122,055.0	122,272.0	11,397.0	14,102.0	217.0



Indiana job growth over the year is under the National trend in private sector gains in July. Private Educational & Health Services and Trade Transportation and Utilities both are both growing faster than the US over the year.

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	0.1%	0.2%	UNDER	2.5%	1.5%	OVER	3.5%	2.9%	OVER
.....Private Educational Services	3.7%	-0.4%	OVER	3.3%	0.6%	OVER	3.7%	1.8%	OVER
.....Health Care & Social Assistance	-0.5%	0.3%	UNDER	2.4%	1.7%	OVER	3.5%	3.1%	OVER
Manufacturing	0.1%	0.1%	OVER	-0.8%	-0.1%	UNDER	-1.0%	-0.3%	UNDER
Professional & Business Services	0.6%	0.3%	OVER	-1.9%	1.4%	UNDER	-2.8%	2.8%	UNDER
Financial Activities	0.0%	0.2%	UNDER	0.6%	1.3%	UNDER	1.0%	2.0%	UNDER
Construction	-0.6%	0.2%	UNDER	1.0%	0.8%	OVER	5.9%	3.3%	OVER
Leisure and Hospitality	-0.7%	0.3%	UNDER	0.1%	1.3%	UNDER	1.3%	2.8%	UNDER
Trade, Transportation & Utilities	-0.2%	0.1%	UNDER	1.3%	0.8%	OVER	3.1%	1.4%	OVER
.....Trade	-0.2%	0.1%	UNDER	2.5%	1.0%	OVER	3.5%	1.6%	OVER
.....Transportation, Warehousing & Utils	-0.5%	0.2%	UNDER	-2.4%	0.2%	UNDER	1.9%	0.8%	OVER
All Other	0.7%	0.0%	OVER	-1.0%	-0.3%	UNDER	-1.8%	-0.5%	UNDER
Total Private	0.0%	0.2%	UNDER	0.4%	1.0%	UNDER	1.1%	1.9%	UNDER
Government (Includes Public Schools & Hospitals)	2.9%	0.2%	OVER	0.5%	0.6%	UNDER	-0.2%	0.7%	UNDER
Total Nonfarm	0.4%	0.2%	OVER	0.4%	0.9%	UNDER	0.9%	1.7%	UNDER

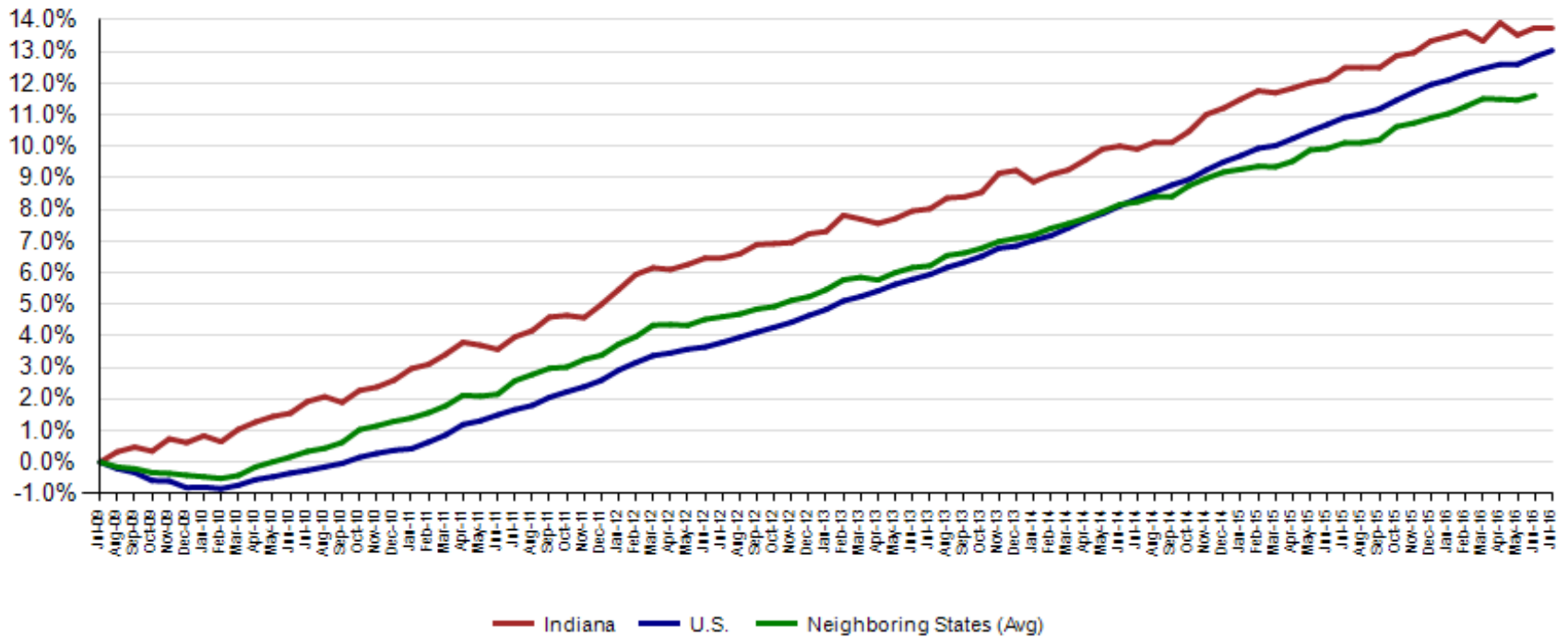


June Total Private preliminary estimates were revised down by 10,800. The change from May to June is now an increase of 5,300.

Revisions to June 2016 Estimates						
INDUSTRY TITLE	May	Jun Prel	Jun Rev	Revision	Chg from May.	Prel Chg from May.
Total Nonfarm	3066.0	3070.2	3059.4	-10.8	-6.6	4.2
Total Private	2637.4	2641.0	2642.7	1.7	5.3	3.6
Goods Producing	654.8	656.1	654.7	-1.4	-0.1	1.3
Service-Providing	2411.2	2414.1	2404.7	-9.4	-6.5	2.9
Private Service Providing	1982.6	1984.9	1988.0	3.1	5.4	2.3
Construction	130.6	133.2	133.1	-0.1	2.5	2.6
Manufacturing	518.1	516.8	515.5	-1.3	-2.6	-1.3
Trade, Transportation, and Utilities	600.1	601.6	602.1	0.5	2.0	1.5
Wholesale Trade	119.6	119.5	120.1	0.6	0.5	-0.1
Retail Trade	338.2	339.5	339.5	0.0	1.3	1.3
Transportation, Warehousing, and Utilities	142.3	142.6	142.5	-0.1	0.2	0.3
Information	31.6	31.4	31.4	0.0	-0.2	-0.2
Financial Activities	132.0	132.0	132.1	0.1	0.1	0.0
Finance and Insurance	97.6	97.6	97.8	0.2	0.2	0.0
Real Estate and Rental and Leasing	34.4	34.4	34.3	-0.1	-0.1	0.0
Professional and Business Services	319.8	317.5	319.6	2.1	-0.2	-2.3
Professional, Scientific, and Technical Services	107.9	107.4	106.9	-0.5	-1.0	-0.5
Management of Companies and Enterprises	33.9	34.0	34.0	0.0	0.1	0.1
Admin & Support & Waste Mgmt & Remediation Services	178.0	176.1	178.7	2.6	0.7	-1.9
Education and Health Services	467.8	470.1	470.4	0.3	2.6	2.3
Educational Services	73.3	72.9	72.9	0.0	-0.4	-0.4
Health Care and Social Assistance	394.5	397.2	397.5	0.3	3.0	2.7
Leisure and Hospitality	304.3	306.9	307.0	0.1	2.7	2.6
Other Services	127.0	125.4	125.4	0.0	-1.6	-1.6
Government	428.6	429.2	416.7	-12.5	-11.9	0.6

Since the low point of employment (July 2009), private sector employment growth in Indiana has surpassed the U.S. (13.8% vs. 13.0%).

Private Sector Job Growth Since the Low Point of Employment in Indiana

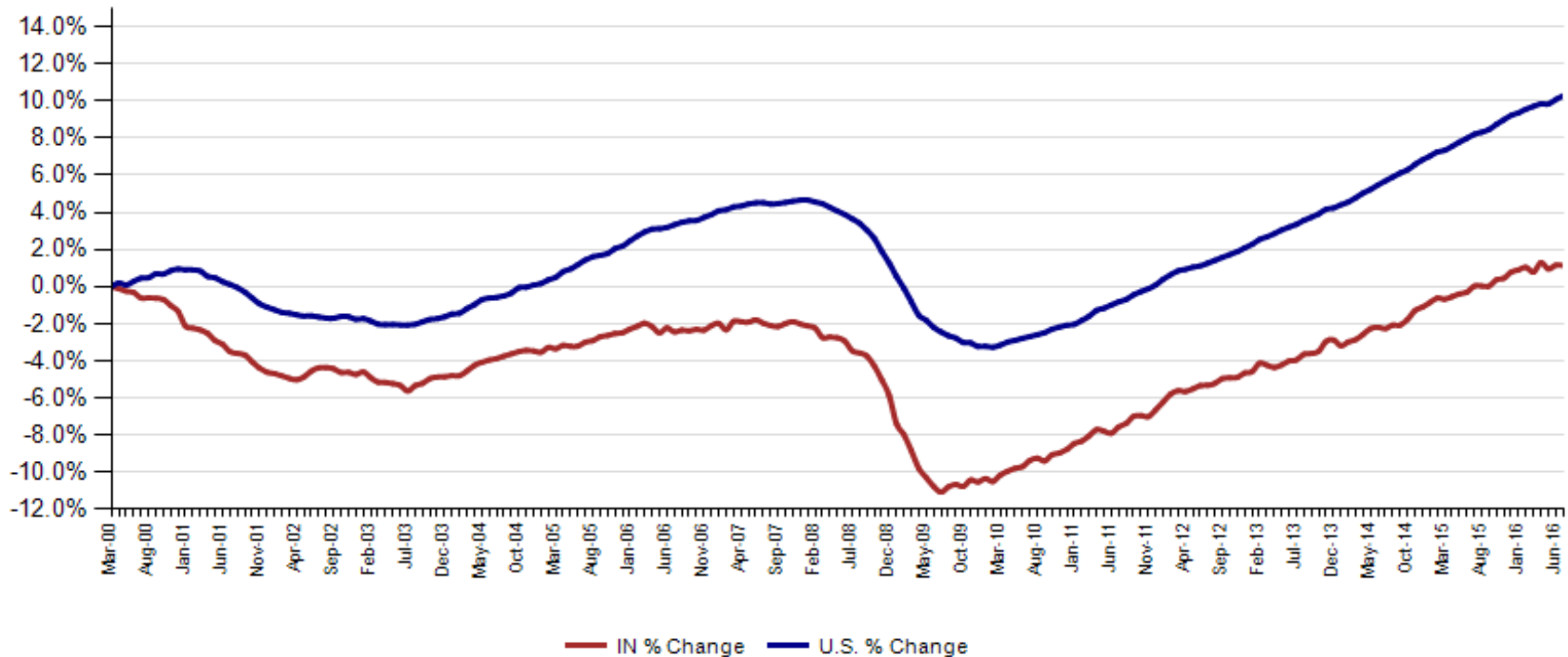


Source: Current Employment Statistics, seasonally adjusted



Since Indiana's high point of employment (March 2000), private sector employment growth in Indiana has lagged the U.S. (1.1% growth vs. 10.3% nationally).

Private Sector Job Growth Since the Peak of Employment in Indiana



Source: Current Employment Statistics, seasonally adjusted



Indiana's Labor Force gained 3,796 over the month, 109,754 over the year, and 192,351 since January 2013. Indiana's labor force stands at 3,375,563. Indiana's Labor Force Participation Rate is at 65.4% for the third straight month. This is the highest it has been since May 2009. The National Labor Force Participation rate stands at 62.8%.

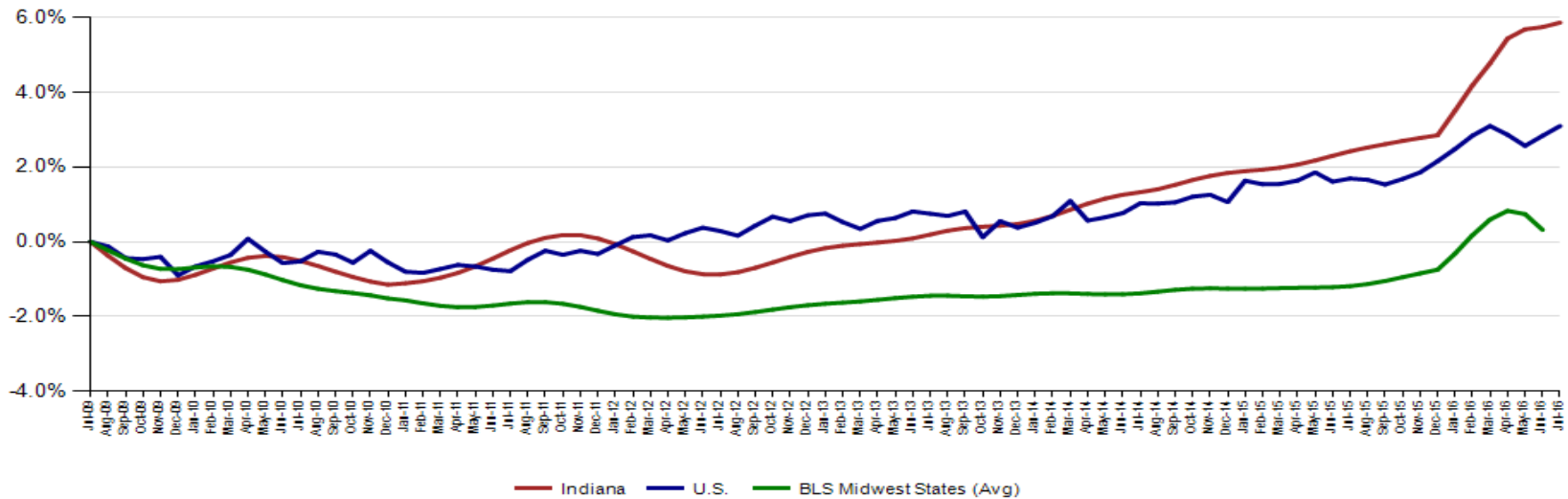
Labor Force Participation Rate





Indiana's Seasonally Adjusted Labor Force is now at 3,375,563 and the number of employed is at 3,220,007. Both of these numbers represent all time highs for Indiana.

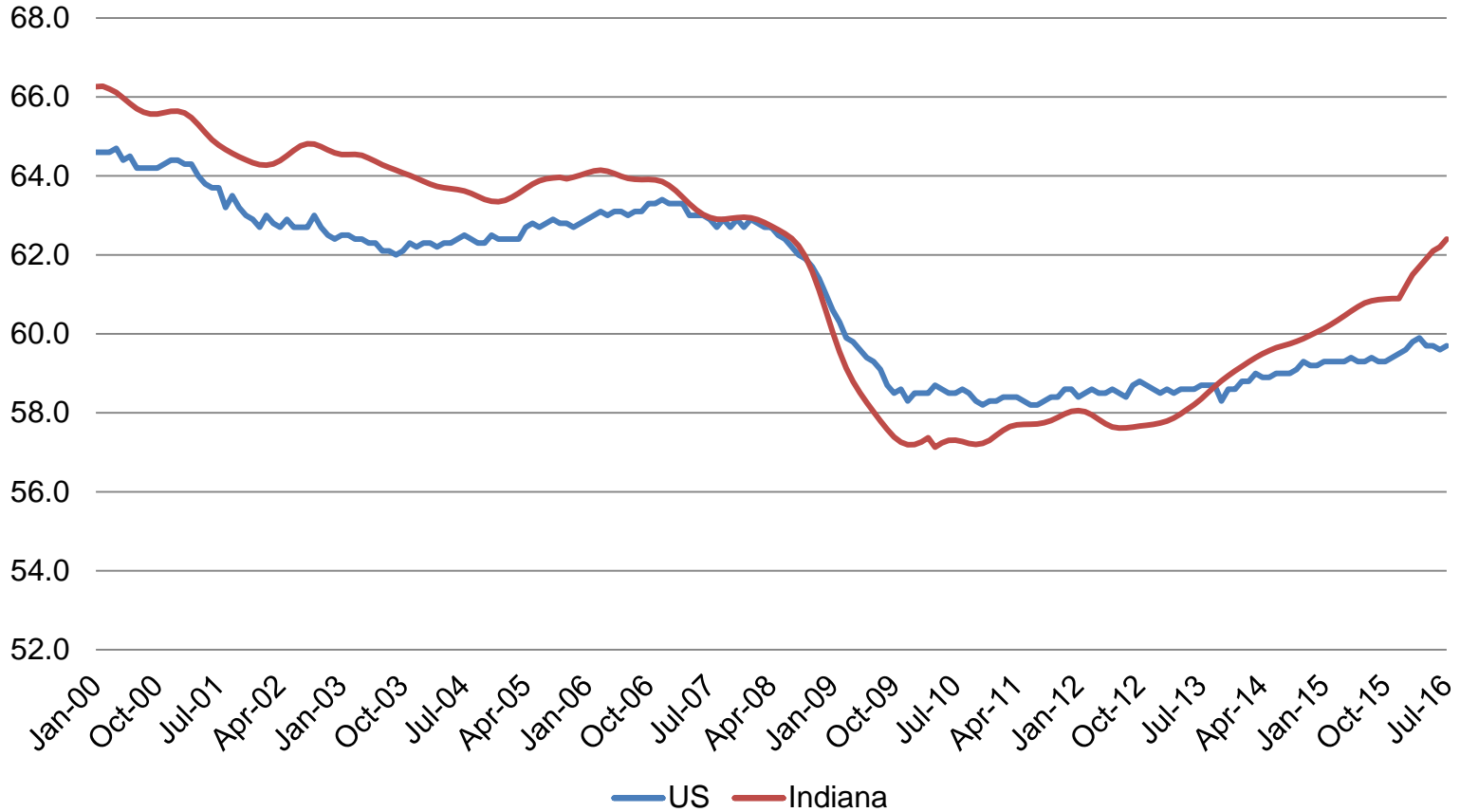
Labor Force Change Since July 2009 Indiana Trough (seasonally adjusted)





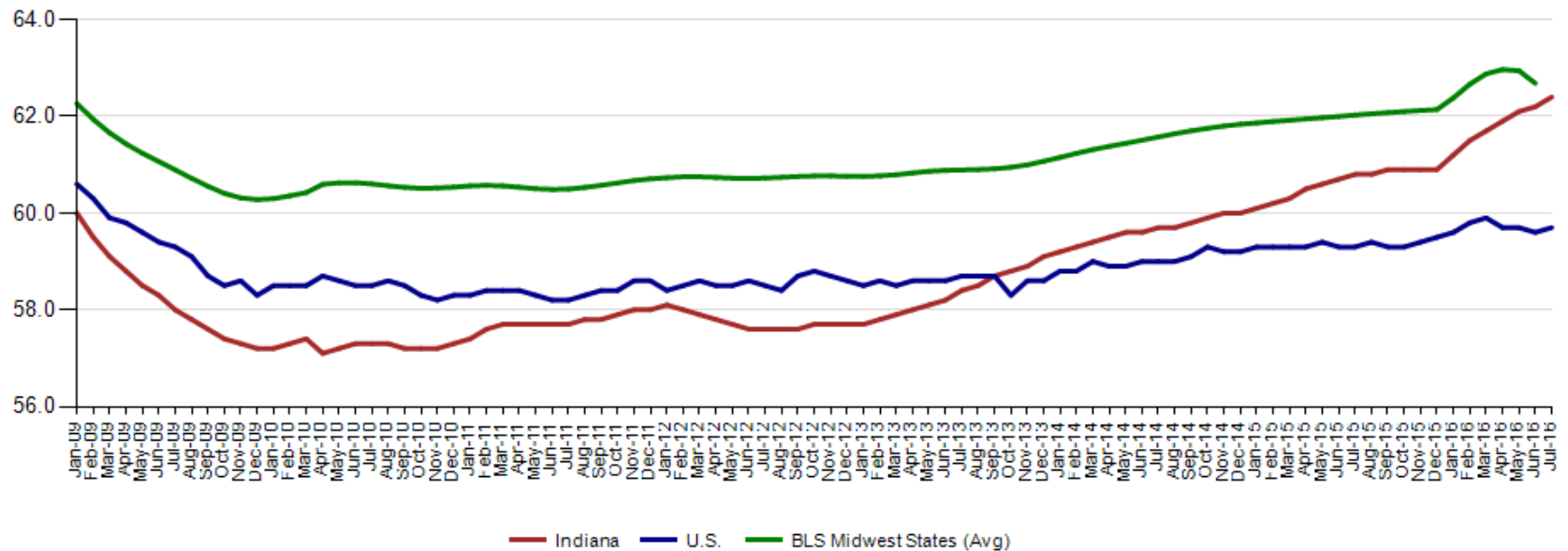
Indiana's Employment to Population Ratio is 62.4%. This is the highest recorded since July 2008. The US stands at 59.7%.

Employment to Population Ratio



Indiana's Employment to Population rate of 62.4 has almost caught up with the average for our BLS Regional States 62.7 (June 2016).

Employment to Population Ratio (seasonally adjusted)



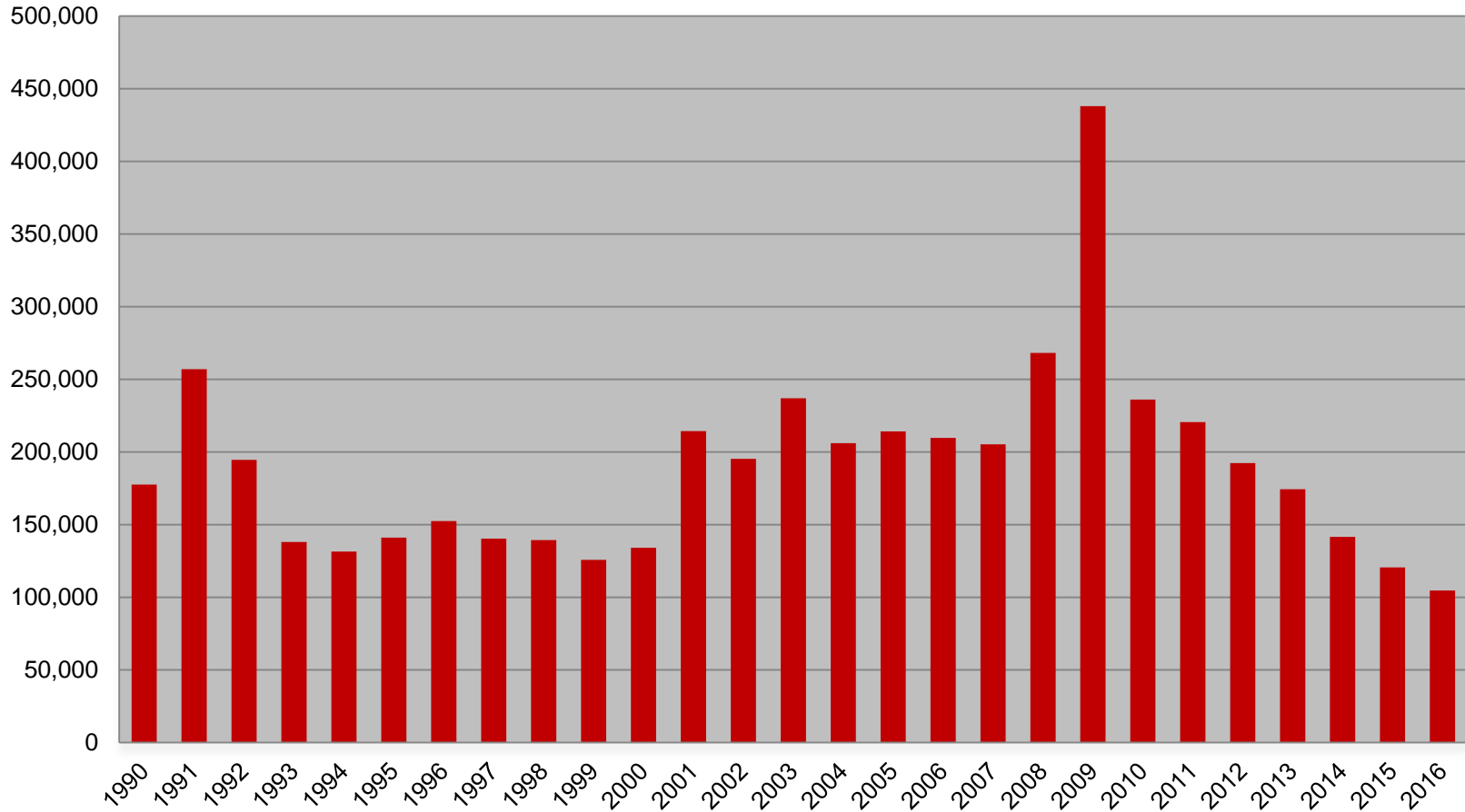


Midwest Comparison Rates: Seasonally
Adjusted Over the Year and Over the Month
(confidential and preliminary)

	July 2015	June 2016	July 2016	Monthly change	Yearly change
Indiana	4.6%	4.8%	4.6%	-0.2%	0.0%
U.S.	5.3%	4.9%	4.9%	0.0%	-0.4%
Illinois	5.8%	6.2%		-6.2%	-5.8%
Kentucky	5.3%	5.0%	4.9%	-0.1%	-0.4%
Michigan	5.2%	4.6%	4.5%	-0.1%	-0.7%
Minnesota	3.6%	3.8%		-3.8%	-3.6%
Ohio	4.7%	5.0%	4.8%	-0.2%	0.1%
Wisconsin	4.6%	4.2%	4.2%	0.0%	-0.4%



Weekly Initial Claims – 32 weeks aggregate





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

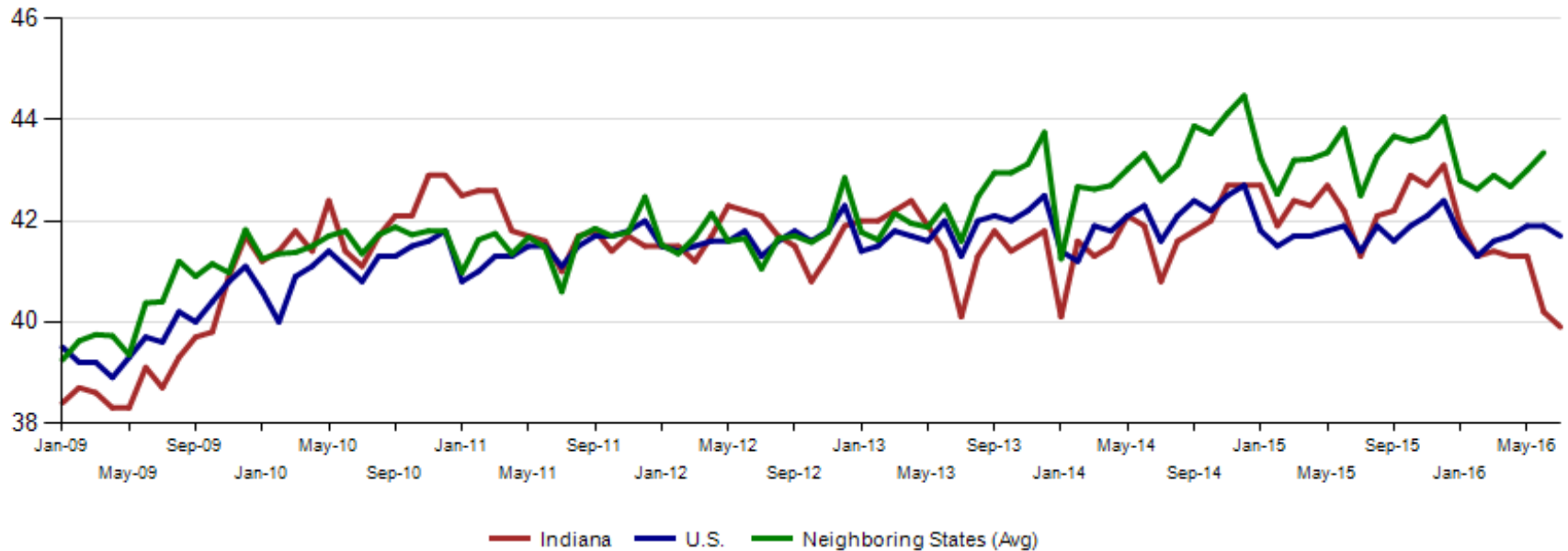
Without earnings – Reference week claims

	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	36,909	354	(2,373)
MARCH	59,716	64,936	74,759	157,257	93,469	71,696	60,752	54,578	45,928	35,755	32,439	(4,470)	(3,316)
APRIL	48,103	53,325	64,948	143,842	74,481	59,036	51,652	48,548	39,717	25,597	23,895	(8,544)	(1,702)
MAY	46,779	46,002	55,480	141,174	66,779	54,680	46,328	42,997	32,460	22,807	22,300	(1,595)	(507)
JUNE	45,533	46,350	57,228	136,670	67,996	55,021	46,820	41,722	29,524	22,030	22,025	(275)	(5)
JULY	53,424	51,141	72,032	121,336	69,447	58,031	47,268	44,597	30,845	22,341	22,016	(9)	(325)
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 again fell 0.3 to 39.9 in July 2016. This is the lowest this number has been since October 2009. Nationally, manufacturing weekly hours fell to 41.7. This is the fifth month in a row that the National average weekly hours was higher than Indiana.

Avg. Weekly Manufacturing Production Hours (non seasonally adjusted)





Institute For Supply Management: "The July PMI[®] registered 52.6 percent, a decrease of 0.6 percent from the June reading of 53.2 percent. Note that employment is showing contraction for July.

MANUFACTURING AT A GLANCE JULY 2016						
Index	Series Index Jul	Series Index Jun	Percentage Point Change	Direction	Rate of Change	Trend* (Months)
PMI [®]	52.6	53.2	-0.6	Growing	Slower	5
New Orders	56.9	57.0	-0.1	Growing	Slower	7
Production	55.4	54.7	+0.7	Growing	Faster	7
Employment	49.4	50.4	-1.0	Contracting	From Growing	1
Supplier Deliveries	51.8	55.4	-3.6	Slowing	Slower	3
Inventories	49.5	48.5	+1.0	Contracting	Slower	13
Customers' Inventories	51.0	51.0	0.0	Too High	Same	2
Prices	55.0	60.5	-5.5	Increasing	Slower	5
Backlog of Orders	48.0	52.5	-4.5	Contracting	From Growing	1
New Export Orders	52.5	53.5	-1.0	Growing	Slower	5
Imports	52.0	52.0	0.0	Growing	Same	2
OVERALL ECONOMY				Growing	Slower	86
Manufacturing Sector				Growing	Slower	5

Manufacturing ISM[®] *Report On Business*[®] data is seasonally adjusted for New Orders, Production, Employment and Supplier Deliveries indexes.

*Number of months moving in current direction.



Internal Indiana Career Connect job orders are 62,692 in July. Retail Trade had the most job orders followed by, Health Care & Social Services and Administrative & Support & Waste Management & Remediation Services (this includes temp help services)

NAICS title	Jul-2016			Prior Year			Current Year			Change over Prior Year			Current Year Including External		Current Duration (days)
	May	June	July	May	June	July	May	June	July	May	June	July	May	June	July
Total	6,111	6,716	6,616	8,882	9,511	10,144	45%	42%	53%	58,684	60,931	62,692			50
Retail Trade	337	574	601	802	826	835	138%	44%	39%	7,218	7,584	11,252			41
Health Care and Social Services	1,301	1,397	1,405	1,706	2,182	2,353	31%	56%	67%	12,000	14,245	11,046			39
Admin. & Support & Waste Mgt. & Rem. Services	825	992	833	1,233	1,193	1,032	49%	20%	24%	7,373	7,308	7,620			56
Accommodation and Food Services	143	251	172	364	260	619	155%	4%	260%	2,251	2,581	6,017			40
Transportation & Warehousing	399	330	347	444	448	511	11%	36%	47%	6,502	6,567	5,115			64
Manufacturing	1,098	1,164	1,058	1,570	1,666	1,647	43%	43%	56%	4,729	4,562	4,314			55
Professional, Scientific, and Technical Services	361	443	435	641	593	681	78%	34%	57%	3,097	3,246	3,398			65
Educational Services	105	154	171	434	644	752	313%	318%	340%	4,184	3,786	3,198			34
Finance and Insurance	300	177	236	242	196	249	-19%	11%	6%	2,918	2,523	2,902			87
Wholesale Trade	334	354	442	361	412	377	8%	16%	-15%	2,138	2,233	2,255			41
Information	189	166	224	253	310	383	34%	87%	71%	1,536	1,470	1,568			36
Other Services(Except Public Administration)	174	154	157	199	160	170	14%	4%	8%	982	895	1,037			104
Real Estate and Rental and Leasing	69	76	59	107	99	107	55%	30%	81%	710	700	956			61
Management of Companies and Enterprises	13	8	12	15	21	20	15%	163%	67%	868	1,617	810			79
Public Administration	143	108	150	208	181	143	45%	68%	-5%	1,237	739	557			79
Construction	184	197	176	171	165	124	-7%	-16%	-30%	515	481	303			86
Utilities	63	86	74	72	78	72	14%	-9%	-3%	226	212	154			46
Arts, Entertainment, and Recreation	21	20	33	13	18	25	-38%	-10%	-24%	93	71	92			61
Mining	11	26	2	6	25	20	-45%	-4%	900%	40	48	46			25
Agriculture, Forestry, Fishing and Hunting	32	30	19	31	17	15	-3%	-43%	-21%	57	46	43			108
Unallocated	9	9	10	10	17	9	11%	89%	-10%	10	17	9			153



Multi-Generational Diversity

Generation	Birth Years	Current Ages	Est. Workforce Participation in 2013*
Veterans Traditionalists WWII Generation Silent Generation	1922-1945	70-93	5% (7M)
Baby Boomers “Boomers”	1946-1964	51-69	38% (60M)
Generation X Baby Busters	1965-1980	35-50	32% (51M)
Generation Y Millennials	1981-2000	15-34	25% (40M)



Other Signs of Aging

- For the first time in 100 years, deaths exceeded births among U.S. non-Hispanic whites in 2011
- Today, 16% of the U.S. population is 65+; 26% will be elderly by 2040.
- Close to 40 million people in the U.S. provided unpaid eldercare in 2011 and 2012- at an estimated cost of \$30 billion in loss work productivity.