## Florida Labor Market and Economic Update

#### **Workforce Estimating Conference**

Florida Agency for Workforce Innovation
Labor Market Statistics Center

February 27, 2007



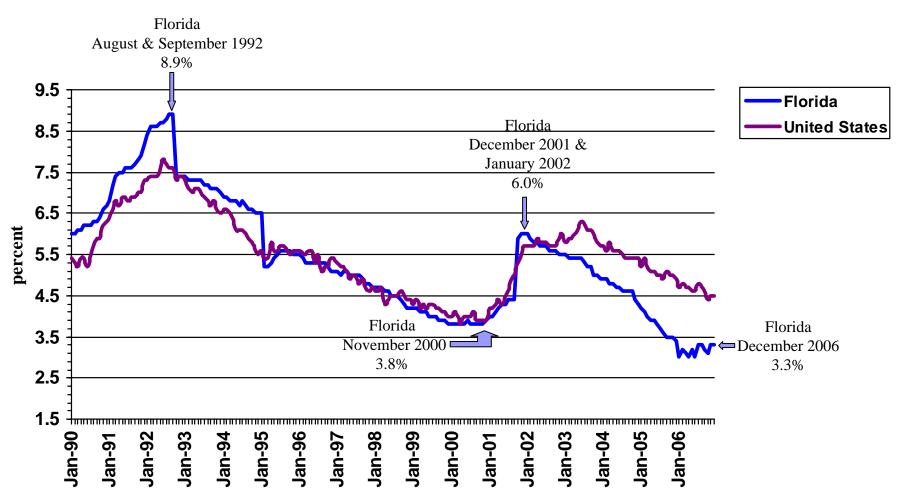
## **Labor Force Conditions Seasonally Adjusted**

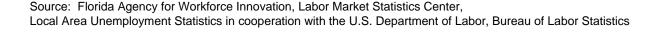
#### December 2006

					Year Ago
				Unemployment	Unemployment
	Labor Force	<b>Employment</b>	Unemployment	Rate	Rate
Florida	9,170,000	8,866,000	304,000	3.3	3.4
United States	152,775,000	145,926,000	6,849,000	4.5	4.9

#### **Unemployment Rates**

#### **Seasonally Adjusted**









#### **Nonagricultural Employment** Florida is Growing Faster than the Nation **Seasonally Adjusted**

	December	December	Over-the-Year	Over-the-Year Percent
Seasonally Adjusted	2006	2005	Change	Change
Florida	8,156,100	7,943,500	212,600	2.7%
United States	137,147,000	134,904,000	2,243,000	1.7%



## **Employment in the Ten Most Populous States Seasonally Adjusted (in thousands)**

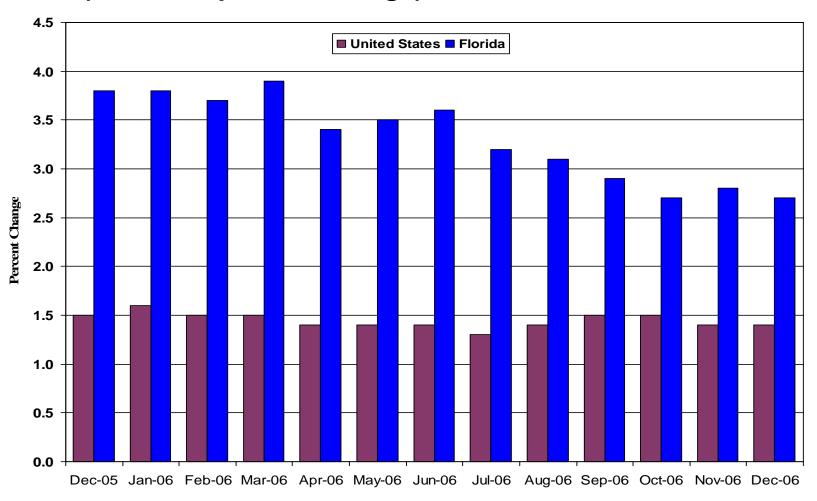
		December 2005 - December 200					
	December	Percent	Level	Level			
State	2006	Change	Change	Rank			
Florida	8,156.1	2.7	212.6	2			
Texas	10,074.5	2.2	213.2	1			
Georgia	4,110.9	2.0	80.2	4			
California	15,089.2	1.1	170.3	3			
Illinois	5,958.9	1.1	64.9	5			
Pennsylvania	5,787.6	0.9	50.0	7			
New York	8,627.5	0.7	61.2	6			
New Jersey	4,085.0	0.5	20.5	8			
Ohio	5,449.4	0.1	3.7	9			
Michigan	4.376.7	-0.5	-19.8	10			

Source: U.S. Department of Labor, Bureau of Labor Statistics, Current Employment Statistics program

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#### Nonagricultural Employment

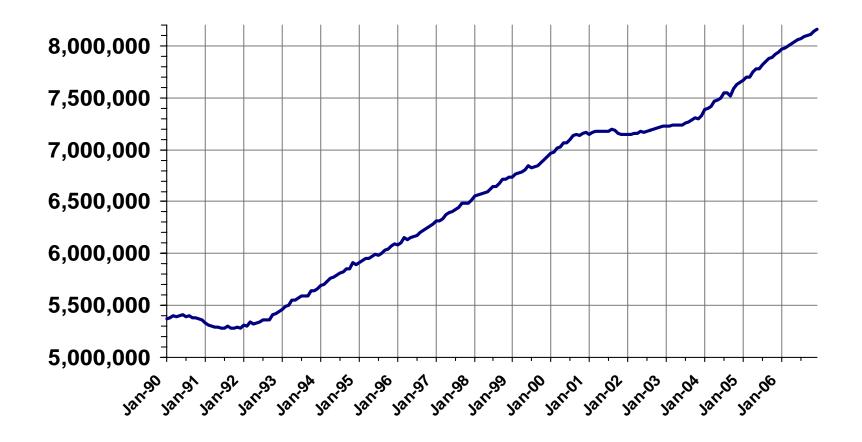
**Seasonally Adjusted** (12-month percent change)





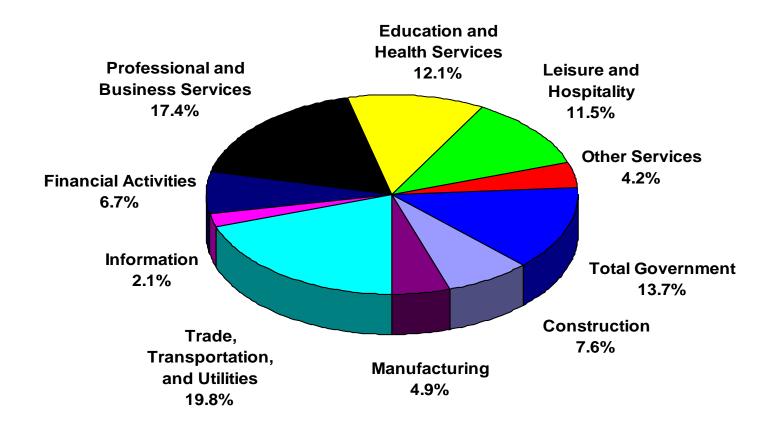


## Florida Nonagricultural Employment Seasonally Adjusted





## Florida's Nonagricultural Employment by Industry December 2006, Seasonally Adjusted







#### **Slowing Job Growth**

Florida's job growth has slowed during 2006. Total job growth has declined from a high of 4.7 percent in September 2005 to 2.7 percent in December 2006. The industries listed below have contributed to slower job growth in Florida:

- Weaker job growth in construction
  - Over-the-year employment growth in construction has declined from a high of 12.9 percent in November 2004 to 3.2 percent in December 2006. This slowing was due to the construction of buildings and specialty trade contractors industries. This was impacted by the declining housing market and hurricane recovery activities.



## Slowing Job Growth continued

- Slower job growth in financial activities, retail trade, and information
  - Over-the-year employment growth in financial activities has declined from a high of 4.9 percent in September 2005 to 2.8 percent in December 2006. This slowing was due to the real estate industry.
  - □ Over-the-year employment growth in retail trade has declined from a high of 5.0 percent in September 2005 to 1.2 percent in December 2006. This slowing was due to general merchandise stores and building materials/garden supply stores industries.



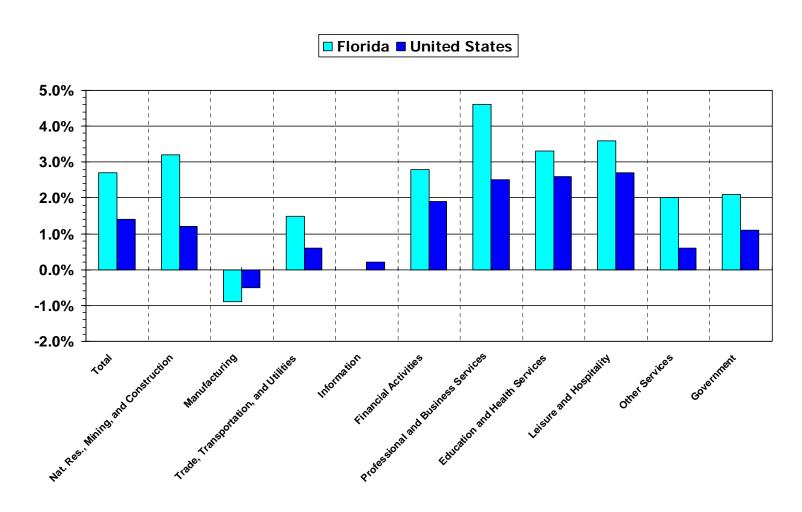
#### **Slowing Job Growth**

#### continued

- Flat job growth in information (telecommunications, newspapers, and internet providers)
  - Over-the-year employment in information had no change in December 2006. This slowing was due to the telecommunications industry.
- Declining job growth in manufacturing
  - Over-the-year manufacturing job gains have declined from a peak of 1.8 percent in December 2004 to -0.9 percent in December 2006. This slowing was due to nonmetallic mineral product manufacturing, textiles, and plastics/rubber product manufacturing industries.



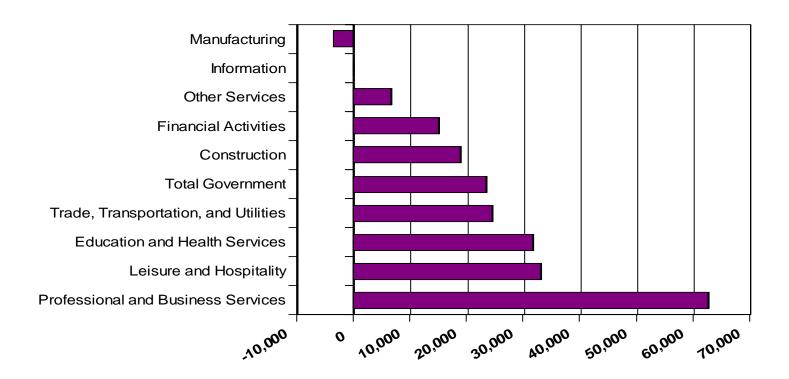
## Nonagricultural Employment by Industry Seasonally Adjusted / Over-the-Year Percent Change December 2006





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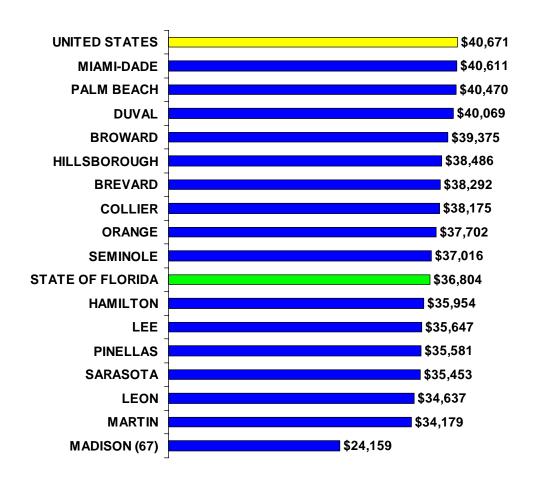
## Professional and Business Services Gains More Jobs Than Any Other Industry in Florida (Over the Year) December 2006, Seasonally Adjusted





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## Florida Average Annual Wages Range from \$40,611 to \$24,159



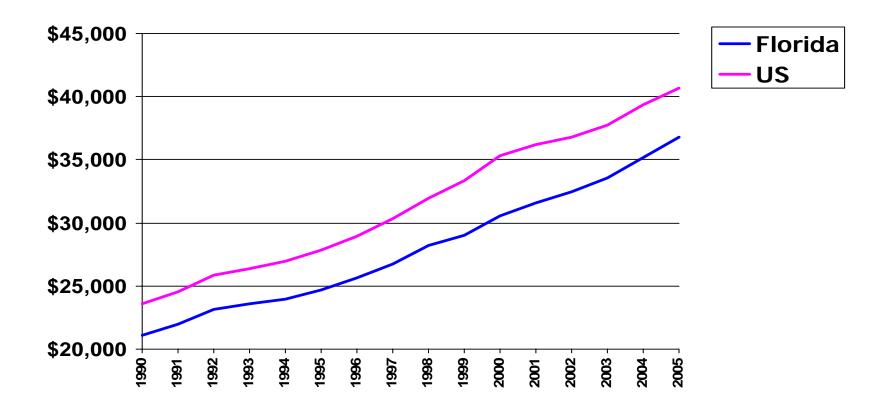


## Florida Wages by Industry Information and Financial Activities Lead the State

Total	\$36,804
Information	\$52,849
Financial Activities	\$52,659
Manufacturing	\$43,409
Government	\$41,272
Professional and Business Services	\$39,390
Education and Health Services	\$38,322
Construction	\$38,284
Trade, Transportation, and Utilities	\$33,950
Other Services	\$25,768
Natural Resources and Mining	\$22,841
Leisure and Hospitality	\$19,300

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#### **Average Annual Wage**



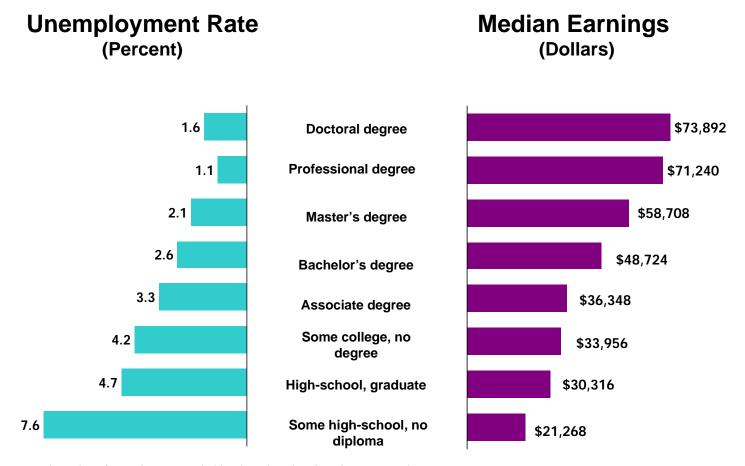
Note: 2005 wages are preliminary

Source: Florida Agency for Workforce Innovation, Labor Market Statistics Center, Quarterly Census of Employment and Wages program in cooperation with the U.S. Department of Labor, Bureau of Labor Statistics, 2005



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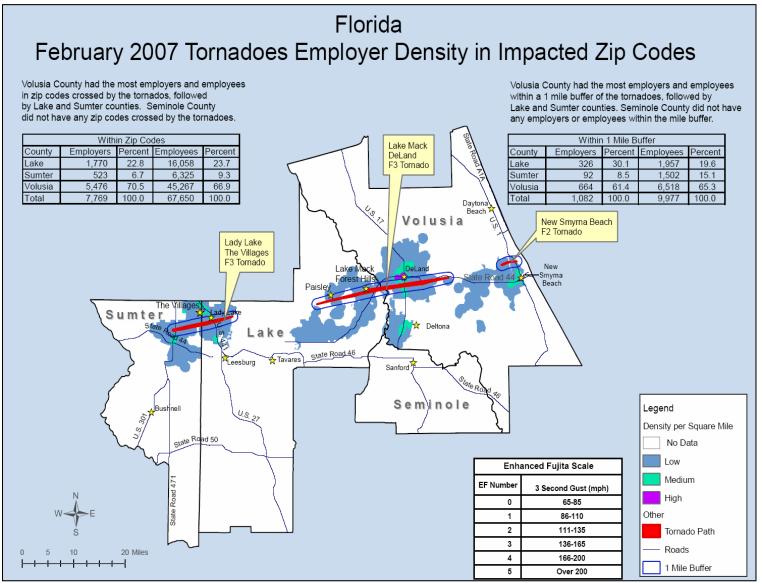
#### **Education and Training pay ...**



Notes: Unemployment and earnings for workers 25 and older, by educational attainment; earnings for full-time wage and salary workers

Sources: Unemployment rate, 2005 annual average: Bureau of Labor Statistics; 2005 Weekly Median Earnings (multiplied by 52 weeks), Bureau of the Census.

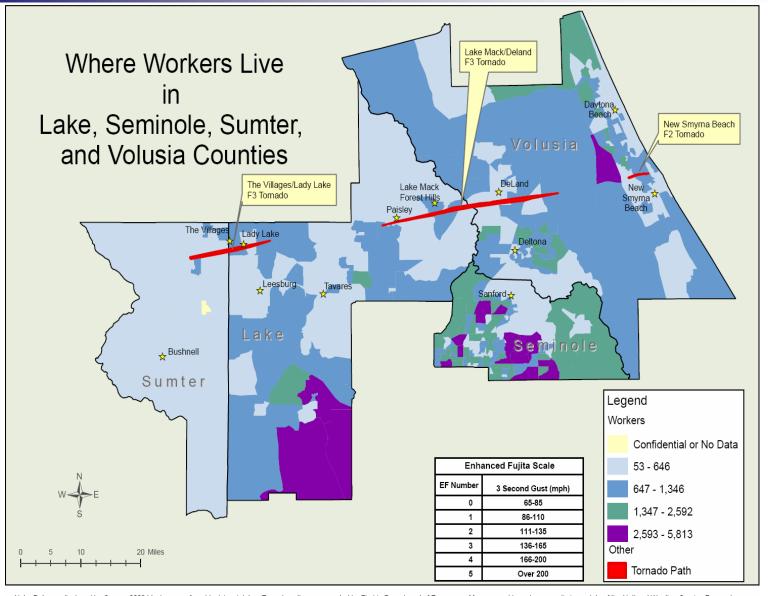




Note: Tornado paths were created by Florida Department of Emergency Management based upon preliminary data of the National Weather Service Forecast Office Melbourne, FL using radar, ground truthing, and aerial surveys. Impacted zip codes include: 32159, 32168, 32713, 32720, 32724, 32736, 32744, 32767, 34731, and 34785. Density calculations create a realistic interpretation of values by displaying the predicted distribution of the data over a continuous surface.

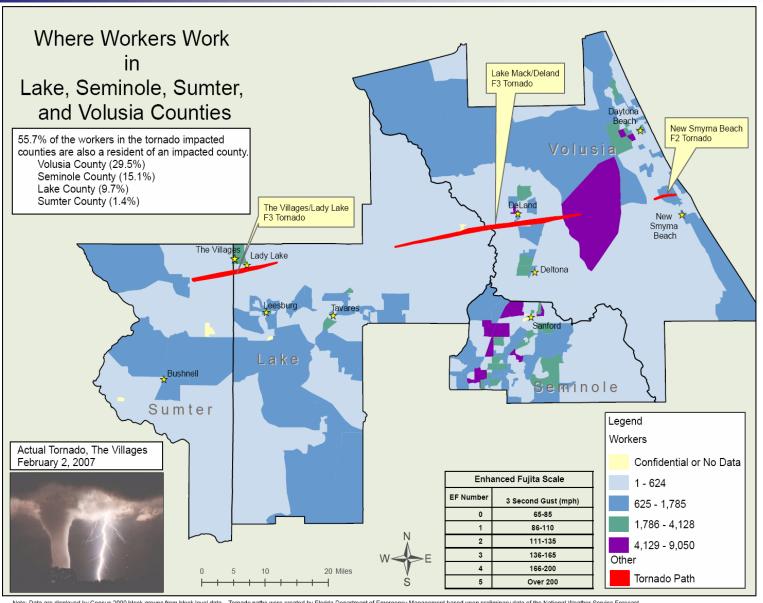
Source: Florida Agency for Workforce Innovation, ALMIS Resource Center Employer Database, InfoUSA Inc., 2007, 1st Edition. Prepared by: Florida Agency for Workforce Innovation, Labor Market Statistics, February, 2007.





Note: Data are displayed by Census 2000 block groups from block level data. Tornado paths were created by Florida Department of Emergency Management based upon preliminary data of the National Weather Service Forecast Office Melbourne, FL using radar, ground truthing, and aerial surveys.

Source: U.S. Department of Commerce, Census Bureau, Local Employment Dynamics (LED), Origin-Destination Matrix (2nd Quarter 2003, primary jobs). Prepared by: Florida Agency for Workforce Innovation, Labor Market Statistics, February, 2007.



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# Florida Agency for Workforce Innovation Labor Market Statistics Developing Regional Targeted Occupations Lists



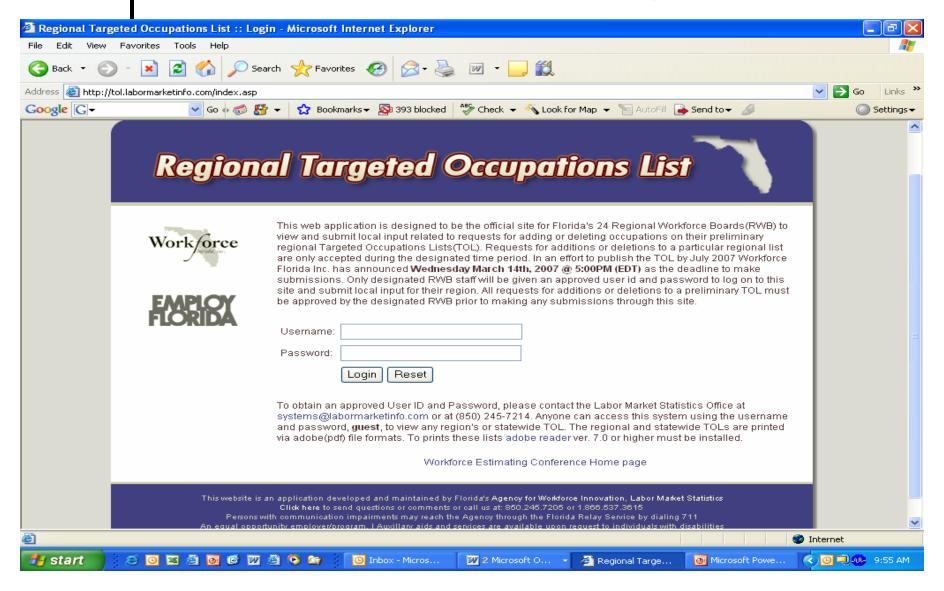
# Produce occupational employment projections and wage estimates for Florida and 24 workforce regions

Workforce Region 12 - Lake, Orange, Osceola, Seminole and Sumter Counties

			Annual	Averag	je Annual Ope	nings	2006		
Occupation		Employment		Due To Due To			Hourly* Wage (\$)		Education
Code Title	2006	2014	Change	Growth	Separations	Total	Average	Entry	Code**
									_
434051 Customer Service Representatives	27,059	33,689	3.06	829	378	1,206		8.95	3
352014 Cooks, Restaurant	11,781	15,857	4.32	510	333	843	10.69	8.12	3
433031 Bookkeeping, Accounting, and Auditing Clerks	22,677	25,573	1.60	362	411	773	14.08	9.87	4
291111 Registered Nurses	15,527	19,229	2.98	463	306	768	25.12	19.69	4
414012 Sales Representatives., Wholesale and Manufacturing, Other	15,536	18,124	2.08	324	391	714	25.79	14.03	3
436011 Executive Secretaries and Administrative Assistants	14,852	17,347	2.10	312	273	584	16.75	12.11	3
499042 Maintenance and Repair Workers, General	13,120	15,779	2.53	332	239	572	13.81	9.49	3
533032 Truck Drivers, Heavy and Tractor-Trailer	13,180	15,754	2.44	322	205	526	15.84	10.78	3
132011 Accountants and Auditors	11,420	13,986	2.81	321	203	524	26.40	17.14	4
419022 Real Estate Sales Agents	11,967	14,215	2.35	281	226	507	22.88	9.65	3
472031 Carpenters	11,040	13,516	2.80	310	170	479	14.91	10.67	3
411011 First-Line Supervisors of Retail Sales Workers	12,199	14,018	1.86	227	211	438	20.85	13.07	3
431011 First-Line Superv. of Office and Admin. Support Workers	10,980	12,615	1.86	204	227	431	21.46	13.36	4
436014 Secretaries, Except Legal, Medical, and Executive	16,144	17,148	0.78	126	304	430	12.41	8.94	3
471011 First-Line Superv. of Construction and Extraction Workers	10,600	12,628	2.39	254	172	425	24.37	17.15	4
111021 General and Operations Managers	8,865	10,881	2.84	252	158	410	46.27	23.57	4
351012 First-Line Superv. of Food Preparation & Serving Workers	6,389	8,259	3.66	234	141	375	15.31	10.68	3
493023 Automotive Service Technicians and Mechanics	7,025	8,382	2.41	170	178	348	18.62	11.16	3
399011 Child Care Workers	5,604	6,454	1.90	106	147	253	8.40	7.12	3
339032 Security Guards	6,085	6,263	0.37	22	131	154	10.09	7.72	3



## Update Regional Targeted Occupations List web application with statewide and regional employment projections and wage estimates





# Calculate the Florida Price Level Index for each workforce region and apply it to the Workforce Estimating Conference approved wage criteria

		ITA Wage	Criteria	HS/HW Wage	e Criteria	2005 Annual	SIZE	<b>Openings</b>
AREA	2005 FPLI	Mean	Entry	Mean	Enty	<b>Employment</b>	Designation	Criteria
FLORIDA	100.00	11.65	9.48	18.27	11.65	7,469,629	NA	150
WDR 1	92.08	10.73	8.73	16.82	10.73	157,387	small	10
WDR 2	93.29	10.87	8.84	17.04	10.87	99,105	small	10
WDR 3	89.95	10.48	8.53	16.43	10.48	29,108	small	10
WDR 4	92.35	10.76	8.75	16.87	10.76	77,687	small	10
WDR 5	97.27	11.33	9.22	17.77	11.33	164,767	small	10
WDR 6	91.85	10.70	8.71	16.78	10.70	30,363	small	10
WDR 7	94.07	10.96	8.92	17.19	10.96	30,813	small	10
WDR 8	101.15	11.78	9.59	18.48	11.78	586,475	large	25
WDR 9	97.52	11.36	9.24	17.82	11.36	129,466	small	10
<b>WDR 10</b>	94.21	10.98	8.93	17.21	10.98	138,897	small	10
<b>WDR 11</b>	94.86	11.05	8.99	17.33	11.05	181,169	small	10
<b>WDR 12</b>	100.22	11.68	9.50	18.31	11.68	989,028	large	25
<b>WDR 13</b>	97.67	11.38	9.26	17.84	11.38	203,583	small	10
<b>WDR 14</b>	100.66	11.73	9.54	18.39	11.73	438,161	large	25
<b>WDR 15</b>	101.69	11.85	9.64	18.58	11.85	625,311	large	25
<b>WDR 16</b>	98.40	11.46	9.33	17.98	11.46	130,986	small	10
<b>WDR 17</b>	97.56	11.37	9.25	17.82	11.37	202,869	small	10
<b>WDR 18</b>	98.92	11.52	9.38	18.07	11.52	280,372	small	10
<b>WDR 19</b>	95.53	11.13	9.06	17.45	11.13	44,203	small	10
<b>WDR 20</b>	98.10	11.43	9.30	17.92	11.43	182,801	small	10
<b>WDR 21</b>	104.52	12.18	9.91	19.10	12.18	546,374	large	25
WDR 22	103.76	12.09	9.84	18.96	12.09	732,745	large	25
<b>WDR 23</b>	102.05	11.89	9.67	18.64	11.89	1,033,973	large	25
WDR 24	102.52	11.94	9.72	18.73	11.94	396,613	large	25



# Screen regional projections and wages against openings and wage criteria established by Workforce Florida Inc. Produce preliminary regional targeted lists





Review local requests for additions and deletions to the regional targeted lists, providing Workforce Florida Inc. with additional analysis of AWI projections and wages

- Provide an analysis of the Occupational Employment Statistics survey response information for a given occupation.
- Supply historical and projected employment trends for primary industries employing an occupation.
- Identify other economic trends that may be impacting employment growth and wages for a given occupation.



## Produce final regional targeted lists for Workforce Florida Inc. to distribute to regional boards and other workforce partners

#### 2006-07 Regional Targeted Occupations List

Sorted by Occupational Title

Workforce Region 12 - Lake, Orange, Osceola, Seminole, and Sumter Counties

#### Workforce Estimating Conference Region 12 Selection Criteria:

- FLDOE Training Codes 3 (PSAV Certificate) and 4 (Community College Credit/Degree)
- 2 25 annual openings and positive growth
- 3 Mean Wage of \$11.39/hour and Entry Wage of \$9.27/hour
- High Skill/High Wage (HSHW) Occupations: Mean Wage of \$17.86/hour and Entry Wage of \$11.39/hour

			Ailidai				ILDOL	
			Percent	Annual	2005 Hou	ırly Wage	Training	Data
SOC Code*	HSHW**	Occupational Title*	Growth	Openings	Mean	Entry	Code	Source†
132011	HSHW	Accountants and Auditors	2.67	458	25.76	16.82	4	R
113011	HSHW	Administrative Services Managers	2.55	67	35.26	19.65	4	R
413011	HSHW	Advertising Sales Agents	2.43	49	24.36	12.25	3	R
132021	HSHW	Appraisers and Assessors of Real Estate	4.22	51	18.07	15.43	3	R
173011	HSHW	Architectural and Civil Drafters	2.12	28	21.66	15.27	3	R
274011	HSHW	Audio and Video Equipment Technicians		32	20.22	14.90	3	L
493021	HSHW	Automotive Body and Related Repairers	2.00	38	20.32	12.38	3	R
493023		Automotive Service Technicians and Mechanics	3.10	374	17.20	10.75	3	R
395011		Barbers		35	16.35	10.31	3	L
433031		Bookkeeping, Accounting, and Auditing Clerks	1.38	617	13.75	9.60	4	R
472021	HSHW	Brickmasons and Blockmasons	2.18	29	18.05	13.87	3	R
274012	HSHW	Broadcast Technicians		40	19.95	15.13	3	L
493031		Bus and Truck Mechanics and Diesel Engine Specialists	1.69	75	17.08	12.96	3	R
131199	HSHW	Business Operations Specialists, All Other	3.72	380	27.87	16.18	4	R
292031	HSHW	Cardiovascular Technologists and Technicians		26	22.92	19.24	4	L
472031		Carpenters	2.57	357	14.93	10.75	3	R

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#### Workforce Florida, Inc Targeted Occupations Lists

#### 1. Process:

- Workforce Florida considers the wage criteria recommended by the Workforce Estimating Conference for application to its regional targeted occupations lists (TOLs). WFI has adopted the WEC wage criteria every year since the WEC has been making wage recommendations.
- WFI Targeted Occupations Committee –
   Adopts the WEC wage criteria recommendations or adopts alternate criteria via a publicly-noticed meeting.
- Using the wage criteria as adopted by the Targeted Occupations Committee, and based on employer survey data and localized wage/demand criteria gathered by Labor Market Statistics (LMS) within the Agency for Workforce Innovation, preliminary targeted occupations lists are created.
- WFI distributes the 'preliminary' targeted lists to regions and seeks their review/input to determine "What did we miss?" This provides the regional workforce boards an opportunity to request changes to those preliminary targeted occupations lists via an on-line request process. Regions use the web-based input system to submit requests for occupations to be added or deleted from the 'preliminary' lists.
- Upon getting input from LMS and Department of Education staff, WFI staff develops and compiles initial staff recommendations (APPROVE/DENY) regarding each of the regional board requests.
- If they wish to appeal any of the WFI initial staff recommendations, regional boards are given an opportunity to provide additional supporting documentation to justify their requests.
- WFI Targeted Occupations Committee Acts upon the final staff recommendations via a
  publicly noticed meeting. Final staff recommendations are provided to the WFI Targeted
  Occupations Committee which is empowered by the WFI Board of Directors for approving
  TOLs. Regional boards are again given an opportunity at this time to appeal the final staff
  recommendations.
- Department of Education (DOE) Provides final training program-to-occupation linkages to all identified occupations.
- The Targeted Occupations Lists are adopted and published.

#### 2. Results for 2006-07.

- There are on average slightly more than 100 occupations targeted in each of the 24 workforce regions or a total of approximately 2500 in the system.
- 11 of the 24 regional boards submitted requests for changes to the preliminary TOLs.
- There were 94 individual change requests received from these 11 regional boards. 40 change requests were received from Region 12 (Lake, Orange, Osceola, Seminole, and Sumter Counties). 17 of R12's requests were to have occupations already listed on its preliminary TOL upgraded to High Skills/High Wages designation.
- The initial WFI staff recommendations approved 83 of the 94 requests. One recommendation was changed (from DENY to APPROVE) by the Targeted Occupations Committee so a total of 84 of the 94 requests were approved for 2006-07.