Spring 2018

The INSTITUTE for Public Policy & Economic Development at Wilkes University

A partnership among Geisinger Commonwealth School of Medicine, Keystone College, King's College, Lackawanna College, Luzerne County Community College, Marywood University, Misericordia University, Penn State Scranton, Penn State Wilkes-Barre, The Wright Center, University of Scranton, & Wilkes University

Quarterly Economy Tracker

In This Issue:

Occupations by Region	1-3
Health Insurance Stats	3
The Unbanked	3
Degree Completions	4-5
Construction Industry	5
Selected Economic Indicators	6-7
Labor Market at a Glance	8

The Economic Tracker is a quarterly publication of The Institute for Public Policy & Economic Development which seeks to explore economic data, trends, and issues related to our region's economy.

The Institute for Public Policy & Economic Development at Wilkes University

Wilkes-Barre Office:
85 South Main Street
Wilkes-Barre, PA 18701

Scranton Office:
St. Thomas Hall Room 107
University of Scranton
Scranton, PA 18503

Phone: 570.408.9850
Email: info@institutepa.org
www.institutepa.org

Follow us on Facebook and Twitter!

How Does Occupation Growth in the Region Compare to Other Metro Areas?

Data on growth for broad and detailed occupation categories was collected for 2014 and 2017 from the Bureau of Labor Statistics for several Metropolitan Statistical Areas (MSA) in Pennsylvania as well as the Commonwealth as a whole. The difference between each detailed occupation category was calculated using this three-year interval in order to show how occupational growth varies between regions in Pennsylvania.

The broad occupation category with the highest percentage change in each MSA is shown below. Categories with fewer than 500 employees were excluded from the calculation.

Among the detailed occupational categories, the occupation categories that added the most jobs in the Scranton-Wilkes-Barre-Hazelton MSA were: Laborers and Freight, Stock, and Material Movers, Hand (4,360 jobs added), Combined Food Preparation and Serving Workers, Including Fast Food (1,330), Nursing Assistants (1,030), Stock Clerks and Order Fillers (1,030), and Personal Care Aides (760).

The fastest growing jobs by percent change (that reported at least 100 jobs in each year) in the Scranton-Wilkes-Barre-Hazelton MSA saw no exact overlap with those by difference. The fastest growing jobs by percent change included: Maintenance workers,

(*continued on the next page.*)

Fastest Growing Broad Occupation Category (2014-2017)
By Percent Change, for Selected Metropolitan Statistical Areas

Architecture & Engineering Occupations
Such as architects, engineers, and engineering technicians
Scranton/Wilkes-Barre/Hazleton (+24%)
Allentown/Bethlehem/Easton (+42%)

Community and Social Service Occupations
Such as social workers and counselors
Altoona (+19%)

Legal Occupations
Such as lawyers, paralegals, court reporters, and judges
York/Hanover (+16%)

Personal Care and Service Occupations
Such as barbers, child care workers, and fitness trainers
Erie (+37%)
Pittsburgh (+20%)

Source: Bureau of Labor Statistics Occupational Employment Statistics

Subscribe to the Tracker at www.institutepa.org

Occupations *(continued from Page 1)*

Machinery (161 percent increase), Slaughterers and Meat Packers (155), Property, Real Estate, and Community Association Managers (120 percent), Protective Service Workers, All other (118 percent) and Food Servers, non-restaurant (106 percent).

Among the region's fastest growing occupations by both total growth and percent growth, a theme is apparent in the emphasis on lower thresholds for formal education (High school diploma or equivalent), as only one of the ten mentioned occupations was listed as normally requiring a bachelor's degree. This differs only slightly from trends of highest growth jobs in Pennsylvania, as they generally require high school diplomas or associates degrees.

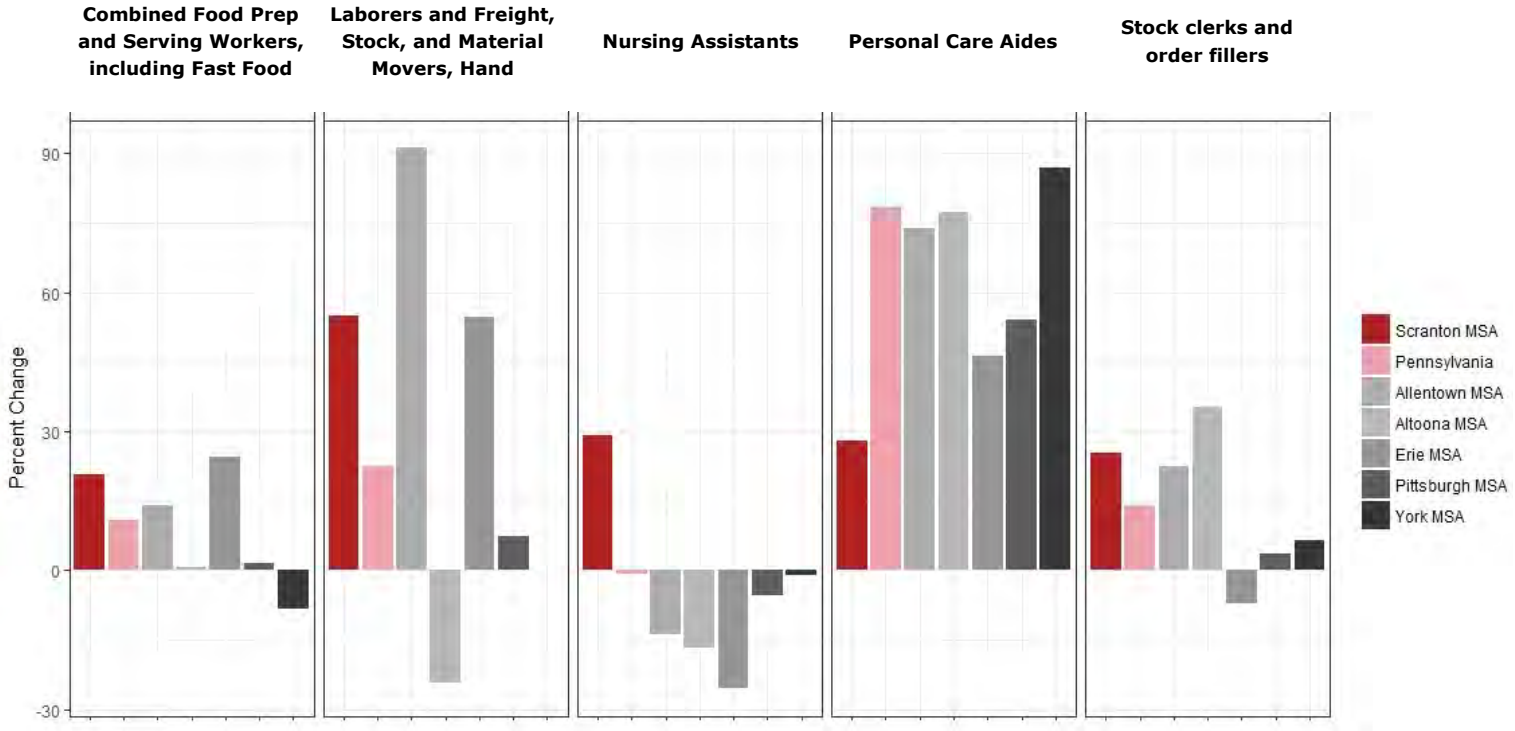
Cross-Region Comparison

The figure below shows the percent growth for several MSAs and Pennsylvania for the five detailed occupation categories that saw the largest total growth from 2014 to 2017. In 2014, the York-Hanover MSA did not report the number of Laborers and Freight, Stock, and Material Movers, so the MSA is omitted from that category.

The Scranton-Wilkes-Barre-Hazelton MSA was the only MSA of those investigated that increased the number of Nursing Assistants from 2014 to 2017. When it comes to food preparation and serving workers, the region's growth was only outpaced by Erie, and Allentown was the only MSA to exceed regional growth in laborers and material movers. However, all MSAs saw large increases in the number of Personal Care Aides, with Northeast PA showing the smallest percentage change. ◇

Percent Occupation Growth Comparison (2014-2017)

For Top 5 Occupations by Total Jobs Added in Scranton/Wilkes-Barre/Hazleton



Source: Bureau of Labor Statistics Occupational Employment Statistics

Be ***In The Know*** at

The Institute's **2018 Regional Indicators Forum**

Thursday, May 10, 2018

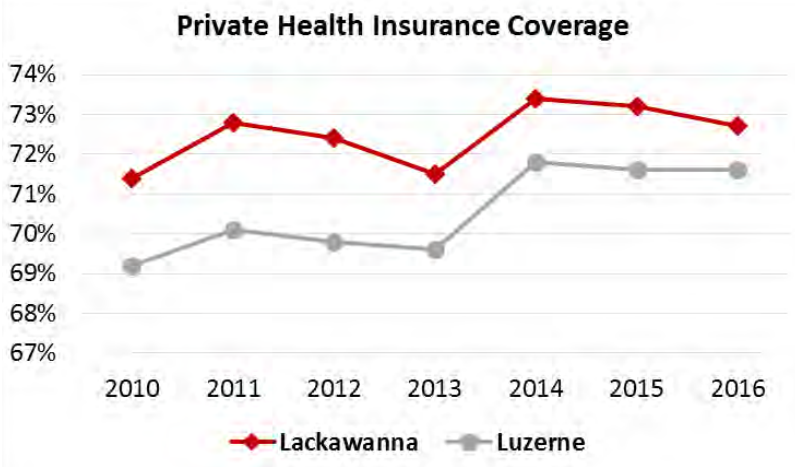
For more information or to register, visit www.institutepa.org

Health Insurance: Regional Data & Trends

The implementation of the Affordable Care Act has significantly impacted health insurance economics regionally and around the United States. The 2015 open enrollment period saw 16,570 total consumers participating in Healthcare.gov plans. This total grew in 2016, but fell in 2017 following a sharp drop in new enrollees.

Participation in all private health insurance plans grew from 2010 to 2011, then fell from 2011 to 2013. Private coverage grew significantly from 2013 to 2014. Currently, about 72 percent of the region's residents are covered by private plans.

Simultaneously, there has been growth in public health insurance plans, from 34 percent to 40 percent regionally. There has also been a decrease in the percentage of the region's population with no coverage, from over ten percent to about four percent. ◇



Federal Marketplace Health Plan Enrollment						
	2017		2016		2015	
	Total Consumers	New Consumers	Total Consumers	New Consumers	Total Consumers	New Consumers
Lackawanna County	7,120	1,973	7,336	2,563	7,067	2,786
Luzerne County	9,701	2,802	9,990	3,654	9,503	3,993
Regional Total	16,821	4,775	17,326	6,217	16,570	6,779

Sources: U.S. Census Bureau, Centers for Medicare and Medicaid Services.

Who Are The Unbanked in Northeastern PA?

Special Indicators 2018 Preview

At the 2018 Regional Indicators Forum on May 10th, The Institute's Jobs, Economy, and Economic Development (JEED) task force will be presenting findings from its recent research paper on the unbanked.

The unbanked are those who do not use or who underutilize traditional financial services such as banks. Those who lack access to financial services, or who choose not to utilize them, frequently may then turn to costlier options such as check cashing services, bill payment services, or payday lenders.

The task force research builds upon recent research the task force has undertaken on financial literacy. Lack of knowledge on personal finance, especially among high-risk populations, contributes to the underutilization of financial services.

As part of this year's research, The Institute conducted a brief survey and focus group of those who do not utilize banks. A range of issues, including bank fees, trust, and cultural barriers were identified as reasons for individuals being unbanked. The Institute will release the full report at the May 10th event and online in the coming weeks. ◇

Business, Nursing Are Top Degrees in Region

Data was compiled on degrees and credentials awarded by the region's higher education institutions for the 2015-2016 school year. The total number of degrees awarded in the region totaled 8,540, which were comprised of 31 percent certificates and 2-year awards, 40 percent 4-year awards, and 28 percent postgraduate awards.

In both counties, business administration and registered nursing had the highest total of degree awards, at 514 and 420, respectively. Lackawanna County's top five fields were rounded out by accounting, Bible/ Biblical studies, and social work. Luzerne County's included teacher educational and professional development, liberal arts, and other education.

Several other fields, such as Psychology, Biology, and Licensed Practical Nursing, were also represented in the top 15 fields in both counties.

Blue-collar occupations,, and trades were represented in both counties as well, including commercial vehicle operations (Luzerne County), cosmetology (Lackawanna County).

The chart on the following page shows the ten fields with the highest regional total of awards, with breakdowns by degree type. The top field regionally, business administration, was comprised of 307 4-year degrees, 130 graduate degrees, and 77 2-year degrees. Registered nursing is largely split between 2-year and 4-year awards, as is liberal arts/ liberal studies. Several other fields, accounting, criminal justice, and biology, are primarily made up of 4-year degree awards.

Lackawanna County: Top 15 Fields of Study by Total Degrees Awarded (2015-2016)

CIP Code	Title	Certificates and 2-year Awards	4-year Awards	Post-graduate Awards	Total Awards
52.0201	Business Administration and Management, General	38	112	34	**184**
51.3801	Registered Nursing/Registered Nurse	48	112	0	**160**
52.0301	Accounting	20	70	43	**133**
39.0201	Bible/Biblical Studies	16	73	38	**127**
44.0701	Social Work	0	12	107	**119**
26.0101	Biology/Biological Sciences, General	0	105	0	**105**
24.0101	Liberal Arts and Sciences/Liberal Studies	67	36	0	**103**
12.0401	Cosmetology/Cosmetologist, General	98	0	0	**98**
43.0107	Criminal Justice/Police Science	90	0	0	**90**
13.0401	Educational Leadership and Administration, General	0	0	89	**89**
51.0801	Medical/Clinical Assistant	83	0	0	**83**
42.0101	Psychology, General	6	62	8	**76**
51.3901	Licensed Practical/Vocational Nurse Training	72	0	0	**72**
42.2803	Counseling Psychology	0	12	59	**71**
52.0801	Finance, General	0	34	36	**70**

Luzerne County: Top 15 Fields of Study by Total Degrees Awarded (2015-2016)

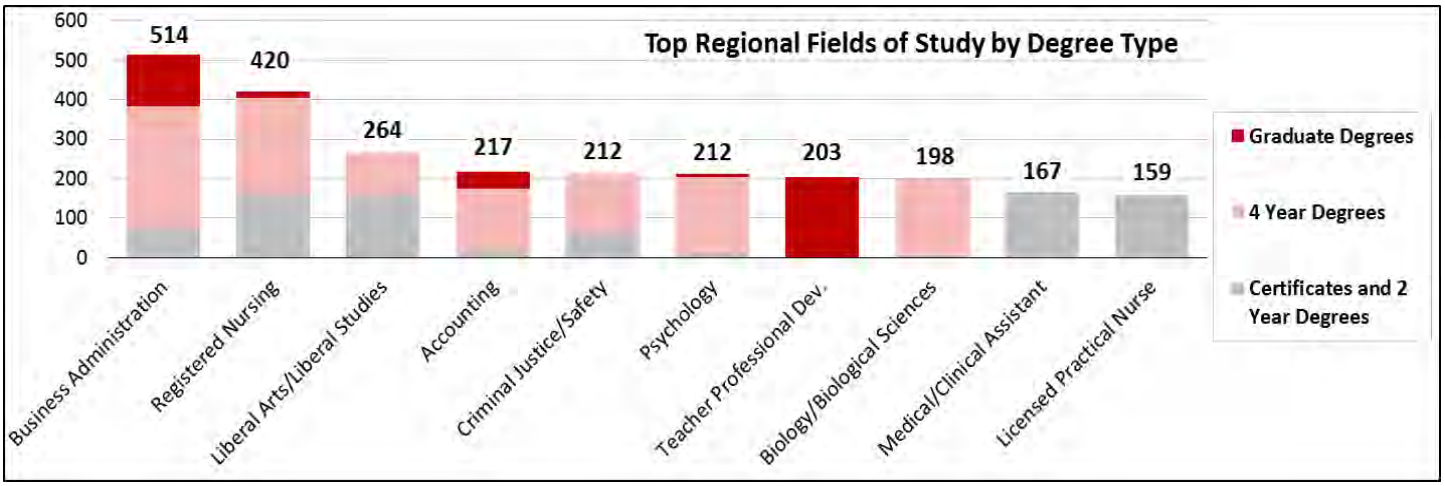
CIP Code	Title	Certificates and 2yr Awards	4yr Awards	Post-graduate Awards	Total Awards
52.0201	Business Administration and Management, General	39	195	96	**330**
51.3801	Registered Nursing/Registered Nurse	112	133	15	**260**
13.1399	Teacher Education and Professional Development, Specific Subject Areas, Other	0	0	201	**201**
24.0101	Liberal Arts and Sciences/Liberal Studies	94	67	0	**161**
13.9999	Education, Other	0	0	147	**147**
43.0104	Criminal Justice/Safety Studies	27	119	0	**146**
42.0101	Psychology, General	7	129	0	**136**
26.0101	Biology/Biological Sciences, General	4	89	0	**93**
51.3901	Licensed Practical/Vocational Nurse Training	87	0	0	**87**
52.0301	Accounting	0	84	0	**84**
51.0801	Medical/Clinical Assistant	84	0	0	**84**
49.0205	Truck and Bus Driver/Commercial Vehicle Operator and Instructor	82	0	0	**82**
51.0000	Health Services/Allied Health/Health Sciences, General	0	78	0	**78**
51.2001	Pharmacy	0	0	73	**73**
13.0501	Educational/Instructional Technology	0	0	66	**66**

Source: Chmura Economics, via JobsEQ

Several other fields, such as Psychology, Biology, and Licensed Practical Nursing, were also represented in the top 15 fields in both counties.

Degrees *(continued from Page 4)*

Teacher Professional Development accounted for 203 graduate degrees, nearly all awarded in Luzerne County. Finally, medical/clinical assistant and LPN awards were entirely made up of certificates or 2-year degrees. This dataset shows that the region's higher education institutions award a mix of degrees levels in a variety of fields to meet the region's ever-evolving workforce challenges. ◇



Source: Chmura Economics, via JobsEQ

Construction Industries Projected to Add Jobs

The construction industry in the region employs over 10,000 workers as of late 2017, with an average annual salary of $48,778, 16 percent higher than the regional average wage for all industries. The industry has seen 0.1 percent employment growth over the last five years, but there are projected to be 5,303 openings in the next five years. Of those, 187 are projected to be new jobs (rather than openings due to workers retiring or leaving the industry). This yields a 0.4 percent annual rate of job growth, compared to all industries where 5-year new job growth is projected to be flat.

Several components of the construction industry are also shown below, with the top three sub-industries for each indicator highlighted in blue. Building equipment contractors is both the largest current construction industry by employment and appears ripe for job growth, with a forecast 77 new jobs. Utility system construction is also projected to have strong job growth, and is the highest paying industry shown with average annual wages of nearly $70,000 per year. ◇

Construction Industry Snapshot

Industry	2017 Employment	Avg. Annual Wages	2012-2017 % Change	5-Year Forecast Openings	5-Year Forecast New Jobs	Average Annual Forecast Growth Rate
Total - All Industries	**254,434**	**$42,122**	**0.5%**	**138,963**	**144**	**0.0%**
Total - Construction Industries	**10,336**	**$48,778**	**0.1%**	**5,303**	**187**	**0.4%**
Residential Building Construction	1,144	$35,786	-2.7%	540	7	0.1%
Nonresidential Building Construction	1,130	$59,277	3.8%	546	17	0.3%
Utility System Construction	620	$69,316	-7.6%	392	69	2.1%
Land Subdivision	140	$64,479	6.9%	57	-9	-1.3%
Highway, Street, and Bridge Construction	519	$53,657	0.1%	281	18	0.7%
Other Heavy and Civil Engineering Construction	106	$62,304	0.9%	55	2	0.3%
Foundation, Structure, and Building Exterior Contractors	1,043	$42,748	0.3%	528	10	0.2%
Building Equipment Contractors	2,901	$52,352	0.0%	1,596	77	0.5%
Building Finishing Contractors	1,132	$35,520	0.6%	491	-24	-0.4%
Other Specialty Trade Contractors	1,601	$45,674	2.8%	836	16	0.2%

Source: Chmura Economics, via JobsEQ

Selected Economic Indicators

Quarterly Workforce Indicators

Quarterly Workforce Indicators is a national dataset of key labor market data produced by the U.S. Census Bureau. The Indicators presented below measure employment at the beginning of the quarter, full quarter employment (stable jobs in existence for the duration of the quarter), new hires, separations (including voluntary and involuntary separations), and turnover rate (the rate at which stable jobs begin and end—one measure of the rate of job creation). Data is presented for the three most recent calendar years for which data is available.

Beginning of quarter and stable employment have trended upwards regionally. The most recent quarter, Q4 2016, saw the sharpest increase in stable employment, and both stable and beginning of quarter employment reached their highest levels in the time period analyzed.

Hires and separations have followed an annual pattern with no definitive trend, as data is not seasonally adjusted. Hires and separations have consistently been lowest in the first quarter of each year. In both counties, the average annual turnover rate matched or exceeded the statewide rate for each year. Lackawanna County has consistently had the highest turnover rate, but it fell from over 9 percent to 8.7 percent from 2015 to 2016. During the same time, Luzerne County's turnover rate rose from 8.2 percent to 8.5 percent.

Quarterly Workforce Indicators - Lackawanna County

	2014				2015				2016			
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Employment (Beginning of Quarter)	91,760	93,824	94,855	95,380	93,002	95,635	95,203	94,677	90,583	94,441	95,563	97,088
Employment (Full Quarter)	83,347	84,148	82,937	85,166	84,459	85,271	81,227	81,941	81,203	84,724	84,156	86,446
New Hires	10,877	13,235	14,031	13,723	10,019	14,033	14,040	14,769	10,809	13,905	16,054	13,765
Separations	12,119	14,288	17,250	15,243	11,957	15,279	19,443	19,121	13,384	14,688	17,727	16,583
Turnover Rate	10.1%	8.9%	9.0%	7.9%	8.7%	9.4%	9.8%	8.1%	8.5%	8.8%	8.8%	8.6%

Quarterly Workforce Indicators - Lackawanna County

	2014				2015				2016			
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Employment (Beginning of Quarter)	91,760	93,824	94,855	95,380	93,002	95,635	95,203	94,677	90,583	94,441	95,563	97,088
Employment (Full Quarter)	83,347	84,148	82,937	85,166	84,459	85,271	81,227	81,941	81,203	84,724	84,156	86,446
New Hires	10,877	13,235	14,031	13,723	10,019	14,033	14,040	14,769	10,809	13,905	16,054	13,765
Separations	12,119	14,288	17,250	15,243	11,957	15,279	19,443	19,121	13,384	14,688	17,727	16,583
Turnover Rate	10.1%	8.9%	9.0%	7.9%	8.7%	9.4%	9.8%	8.1%	8.5%	8.8%	8.8%	8.6%

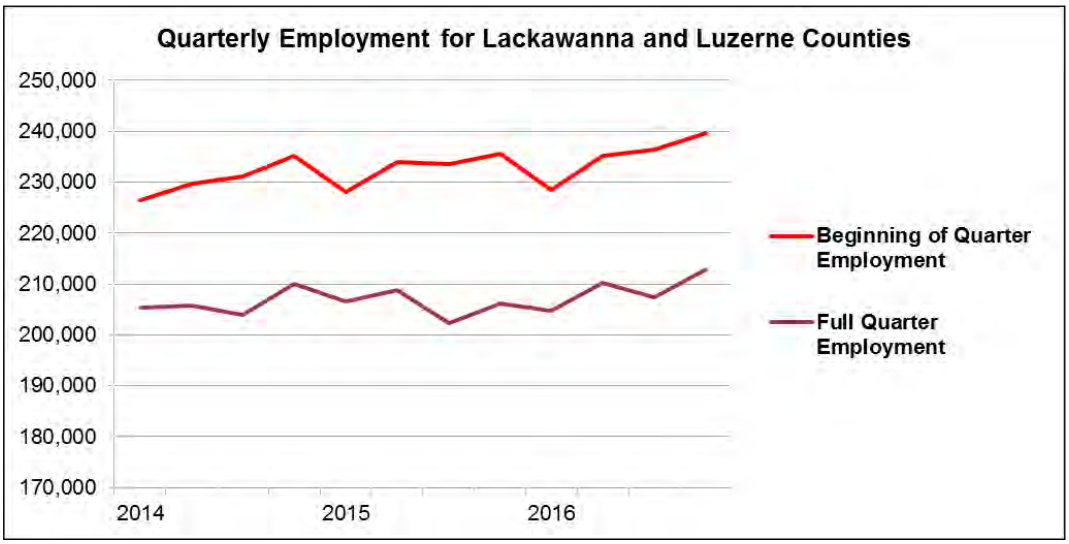
Quarterly Workforce Indicators - Pennsylvania

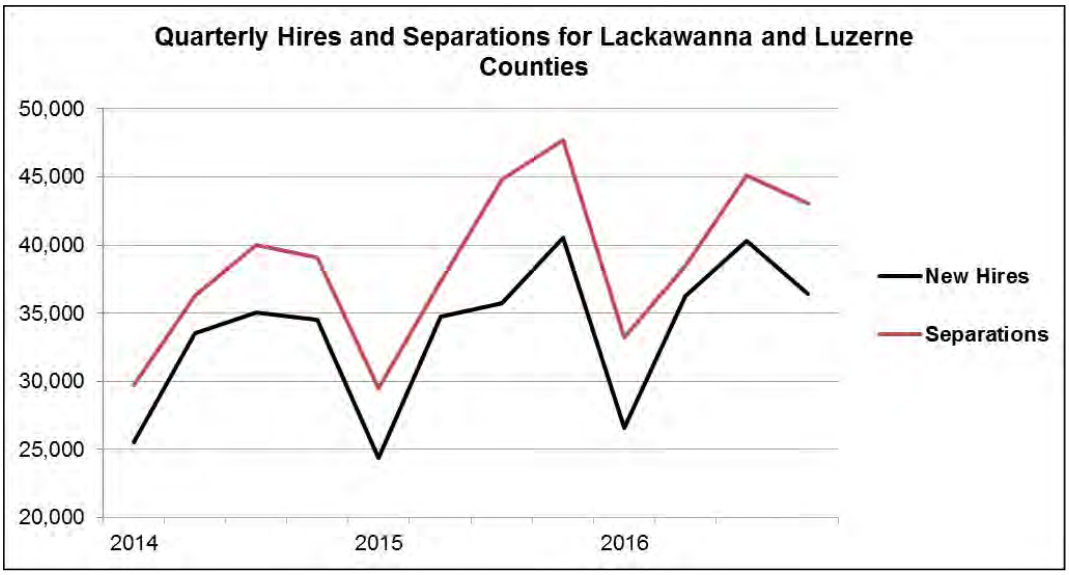
	2014				2015				2016			
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Employment (Beginning of Quarter)	5,405,167	5,521,440	5,535,696	5,598,091	5,461,734	5,563,911	5,586,201	5,654,600	5,528,164	5,640,055	5,655,362	5,701,610
Employment (Full Quarter)	4,951,345	4,967,050	4,902,786	5,022,715	4,976,893	4,994,099	4,905,560	5,030,112	5,011,152	5,065,443	4,975,749	5,099,364
New Hires	561,335	752,894	757,888	710,044	560,369	790,216	794,985	798,388	578,668	797,359	855,385	740,335
Separations	629,223	791,671	905,000	847,174	652,482	821,032	971,027	938,834	698,318	833,454	998,972	900,405
Turnover Rate	8.7%	8.0%	8.5%	7.7%	8.2%	7.8%	8.9%	8.0%	8.5%	7.7%	8.6%	8.4%

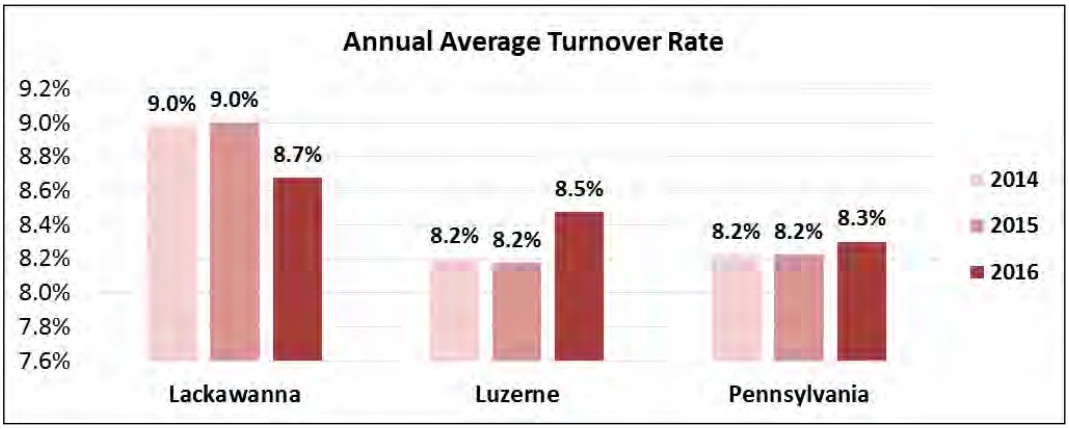
Source: U.S. Census Bureau Quarterly Workforce Indicators

Selected Economic Indicators

Quarterly Workforce Indicators







Source: U.S. Census Bureau Quarterly Workforce Indicators

Signature Underwriter

WILLARY FOUNDATION
Founded by William W. Scranton & Mary L. Scranton

The Willary Foundation is a family foundation dedicated to developing ideas and projects that are interesting, creative and imaginative and which benefit communities in Northeastern Pennsylvania. Willary seeks to foster groups with unique, innovative or unusual ideas and efforts.

The Foundation is disposed to leveraging the impact of its grants by encouraging efforts that could have a ripple effect in the community or by supporting projects in conjunctions with other sources of funding. The Foundation wishes to promote the special qualities of the people of Northeastern Pennsylvania.

Supporting Underwriters

PNC

UGI Energy to do more®

The INSTITUTE for Public Policy & Economic Development at Wilkes University

A partnership among Geisinger Commonwealth School of Medicine, Keystone College, King's College, Lackawanna College, Luzerne County Community College, Marywood University, Misericordia University, Penn State Scranton, Penn State Wilkes-Barre, The Wright Center, University of Scranton, & Wilkes University

The Institute's Research Team:

Teri Ooms, Executive Director
Andrew Chew, Senior Research & Policy Analyst
Susan Magnotta, Director of Community Outreach
Erin McCormick, Research Assistant
Duncan Mayer, Research Assistant
Saidat Sanni, Graduate Assistant
Zachary D'Apolito, Research Intern

Quarterly Economy Tracker Underwriting opportunities available!
Please contact Susan Magnotta (magnotta@institutepa.org) for more information.
Circulation is over 1,000 self-subscribed individuals.

In its publications, The Institute uses the most current data available at the time of release.

Labor Market at a Glance

Throughout 2017, the region, Commonwealth, and United States all continued to see marked improvement in unemployment rates. Both counties, still however, have higher rates than PA or the US. In January 2018, in both counties and statewide, the most recent non-preliminary data available, saw a 0.4 percent decrease in the unemployment rate from the same month of the prior year.

In both counties, the total labor force has seen small declines in recent years, with both counties' workforces shrinking by about 100 between January 2017 and January 2018. Meanwhile, continued slow but steady growth in employment has yielded the improvement in the unemployment rate noted above. ◇

Unemployment Rate (Not Seasonally Adjusted)

	Lackawanna	Luzerne	Pennsylvania	United States
2008	5.8	6.2	5.3	5.8
2009	8.2	9.0	8.0	9.3
2010	9.0	10.0	8.5	9.6
2011	8.8	9.6	7.9	8.9
2012	8.8	9.8	7.8	8.1
2013	8.3	9.4	7.4	7.4
2014	6.6	7.3	5.9	6.2
2015	5.8	6.5	5.3	5.3
2016	5.7	6.3	5.4	4.9
2017	5.1	5.9	4.9	4.4
Jan. 2017	5.9	6.9	5.7	5.1
Jan. 2018	5.5	6.5	5.3	4.5

Source: US Bureau of Labor Statistics, Local Area Unemployment Statistics

Labor Force & Employment

	Lackawanna County		Luzerne County	
	Labor Force	Employment	Labor Force	Employment
2008	108,526	102,231	161,744	151,642
2009	107,192	98,396	161,298	146,781
2010	106,990	97,405	159,763	143,863
2011	107,274	97,814	159,843	144,500
2012	107,640	98,121	160,855	145,103
2013	107,645	98,710	160,767	145,691
2014	106,718	99,692	159,038	147,381
2015	106,408	100,205	158,764	148,514
2016	106,792	100,755	158,791	148,775
2017	106,305	100,852	158,265	148,913
Jan. 2017	106,077	99,839	158,273	147,414
Jan. 2018	106,058	100,229	158,194	147,988

Source: US Bureau of Labor Statistics, Local Area Unemployment Statistics