Ohio | Department of Job and Family Services

To Strengthen Ohio's Families through the Delivery of Integrated Solutions to Temporary Challenges

State of Ohio Workforce

4TH QUARTER

2009

Quarterly Report on the State of Ohio's Workforce

Reference Period: Fourth Quarter 2009

(Per Ohio Revised Code 6301.10)

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Ohio Department of Job and Family Services
Office of Workforce Development
Bureau of Labor Market Information
Release date: March 25, 2010

Summary

Ohio's unemployment rate was 10.8 percent during the fourth quarter of 2009, up from 10.7 during the third quarter and higher than the 7.7 percent for the fourth quarter of 2008. The average number of Ohioans unemployed per month was unchanged over the quarter at 637,000.

The U.S. unemployment rate for the fourth quarter was 10.0 percent, up from 9.7 percent during the third quarter and higher than the 6.9 percent of the fourth quarter of 2008.

Ohio's nonagricultural wage and salary employment fell 18,300 over the fourth quarter, from 5,026,600 to 5,008,300 on a seasonally adjusted basis. Service-providing industries declined by 12,100 jobs. Losses in trade, transportation, and utilities; financial activities; information; and government were partially offset by gains in professional and business services; leisure and hospitality; and educational and health services. Other service industries were unchanged. Goods-producing declined by 6,200 jobs, with losses in manufacturing; construction; and mining and logging.

Compared to the fourth quarter of 2008, Ohio's nonagricultural wage and salary employment declined by 277,700 jobs. Goods-producing industries lost 135,100 jobs, mostly in manufacturing (-104,800). Service-providing industries lost 142,600 jobs compared to the fourth quarter of 2008, with the largest losses in trade, transportation, and utilities (-59,800).

Unemployment Rates
and
Related Data

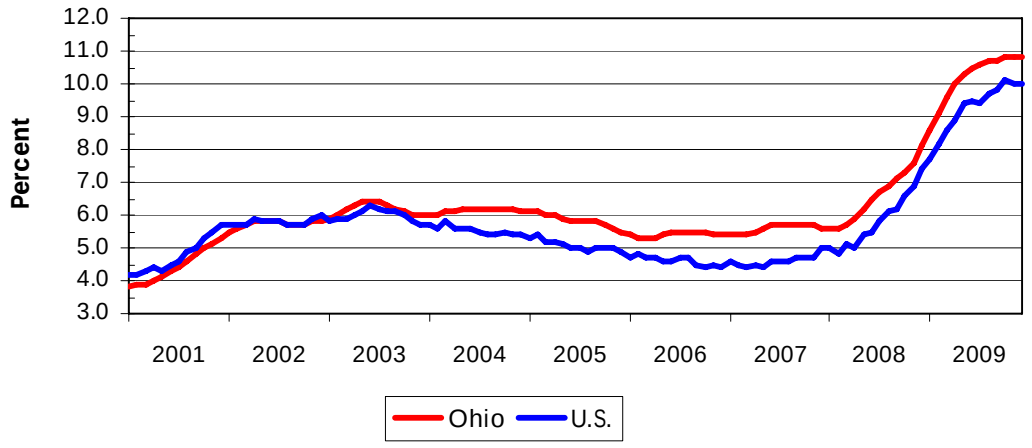
Employment Situation: Ohio and U.S. (Seasonally Adjusted)

Ohio's unemployment rate for the fourth quarter of 2009 was 10.8 percent, up from 10.7 percent in third quarter 2009 and up from 7.7 a year ago. The U.S. unemployment rate for the fourth quarter was 10.0 percent, up from the third quarter 2009 rate of 9.7 percent and up from 6.9 a year ago. The average number of Ohioans unemployed per month did not change over the quarter staying at 637,000.

Employment Situation Indicators for Ohio and U.S.	Quarterly Data (in thousands)			Change (in thousands)		Percent Change	
Seasonally Adjusted	4th Qtr. 2009	3rd Qtr. 2009	4th Qtr. 2008	From Last Quarter	From Last Year	From Last Quarter	From Last Year
	Ohio						
Civilian Labor Force	5,916	5,961	5,986	-45	-70	-0.7%	-1.2%
Employment	5,279	5,324	5,528	-45	-249	-0.8%	-4.5%
Unemployment	637	637	458	1	179	0.1%	39.1%
Unemployment Rate	10.8%	10.7%	7.7%	0.1%	3.1%		
	U.S.						
Civilian Labor Force	153,545	154,235	154,654	-690	-1,109	-0.4%	-0.7%
Employment	138,138	139,339	143,924	-1201	-5,786	-0.9%	-4.0%
Unemployment	15,406	14,895	10,730	511	4677	3.4%	43.6%
Unemployment Rate	10.0%	9.7%	6.9%	0.4%	3.1%		

- Ohio and U.S. unemployment rates closely mirrored each other through mid-2003.
- During the latter half of 2003, the rates began to diverge as Ohio's unemployment rate remained high while the U.S. unemployment rate steadily declined.
- During the last six months, Ohio's unemployment rate has an average 0.9 percentage point higher than the U.S. rate.

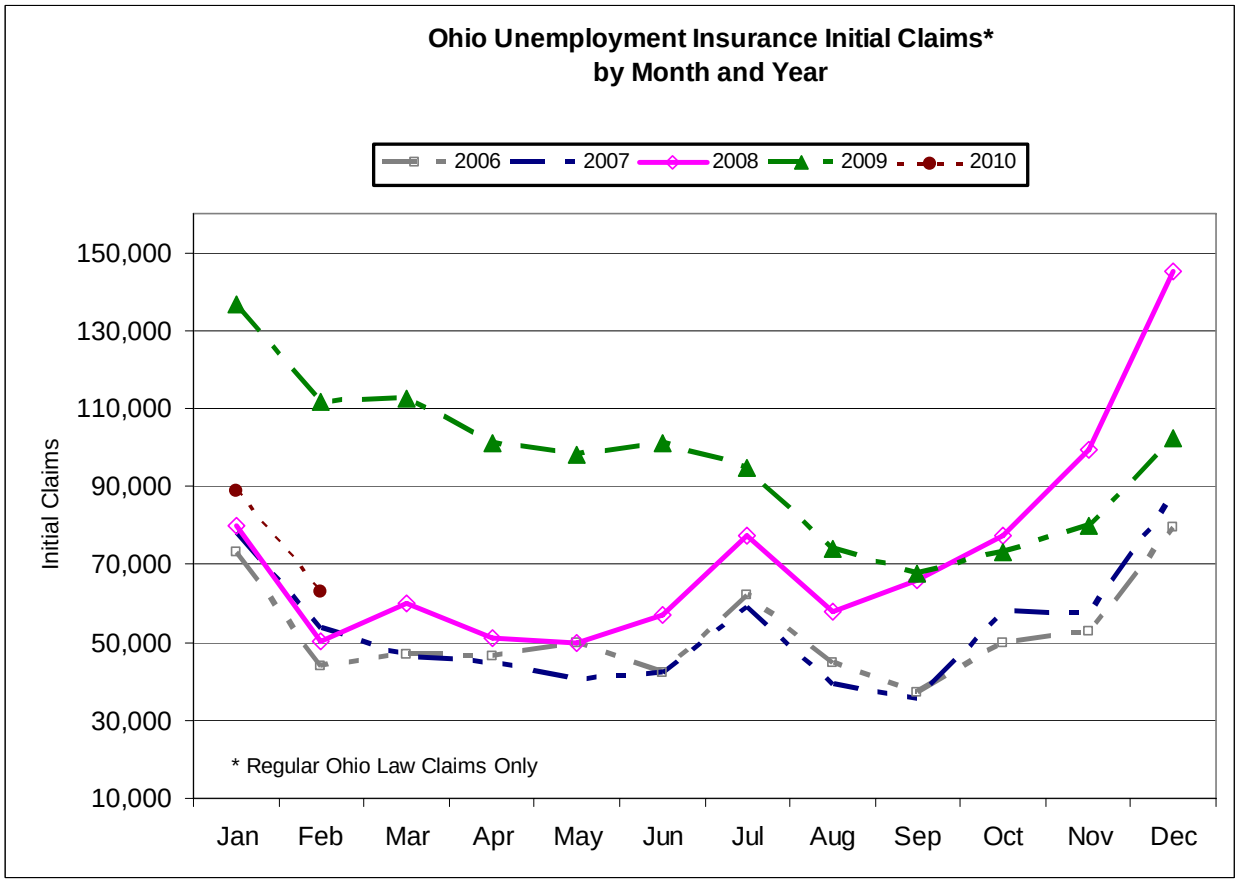
Ohio and U.S. Seasonally Adjusted Unemployment Rates



Ohio Monthly Unemployment Insurance Initial Claims

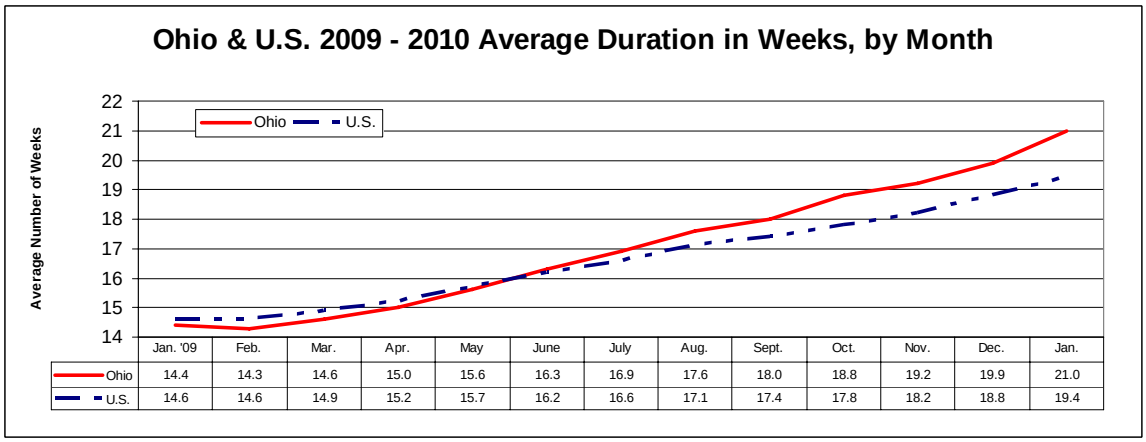
- Monthly initial claims for unemployment insurance follow a typical seasonal pattern every year, with major increases in claims activity occurring in January, July and December.

- Initial claims in February 2010 were substantially lower (43.8%) than the level recorded in 2009.



Average Duration of Unemployment: Ohio and U.S.

Average duration represents the average number of weeks of compensation received by unemployed claimants during the represented period.



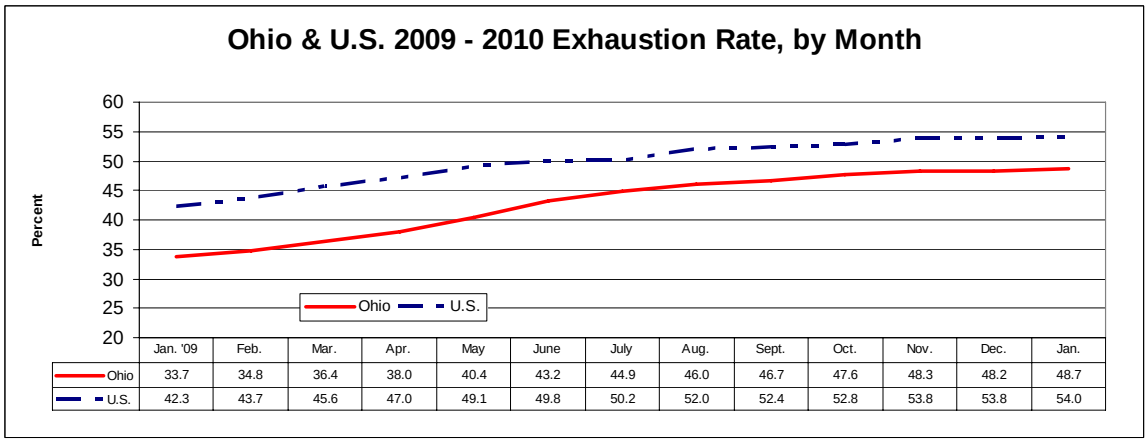
	Jan. '09	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Jan.
Ohio	14.4	14.3	14.6	15.0	15.6	16.3	16.9	17.6	18.0	18.8	19.2	19.9	21.0
U.S.	14.6	14.6	14.9	15.2	15.7	16.2	16.6	17.1	17.4	17.8	18.2	18.8	19.4

- Ohio's average duration of unemployment closely mirrored the U.S. for the past 12 months.

- The Ohio average duration increased to 21.0 weeks for January 2010 while the U.S. average increased to 19.4 weeks for the same period.

Unemployment Insurance Benefit Exhaustions: Ohio and U.S.

The exhaustion rate represents a measure of the proportion of unemployment insurance recipients who ultimately exhaust their benefits.



	Jan. '09	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Jan.
Ohio	33.7	34.8	36.4	38.0	40.4	43.2	44.9	46.0	46.7	47.6	48.3	48.2	48.7
U.S.	42.3	43.7	45.6	47.0	49.1	49.8	50.2	52.0	52.4	52.8	53.8	53.8	54.0

- Ohio and national exhaustion rates have been increasing over the past 12 months.
- Ohio's exhaustion rate stayed consistently lower than that of the U.S.
- Ohio's exhaustion rate increased slightly to 48.7 percent, while the U.S. rate increased slightly 54.0 percent in January 2010.

Employment Data

Ohio Nonagricultural Wage and Salary Employment (Seasonally Adjusted)

Ohio's nonagricultural wage and salary employment fell 18,300 over the quarter, from 5,026,600 in the third quarter of 2009 to 5,008,300 in the fourth quarter of 2009.

Service-providing industries declined 12,100 over the quarter to 4,214,300. Losses were posted in trade, transportation, and utilities (-6,600), financial activities (-5,300), information (-2,300), and government (-2,200). Employment advanced in professional and business services (+3,300), leisure and hospitality (+700), and educational and health services (+300). Total employment in other services was unchanged. The workforce in goods-producing industries, at 794,000, was 6,200 lower. Losses in nondurable goods (-2,800) and durable goods (-1,500) lowered manufacturing employment 4,300. Construction was down 1,600, while mining and logging slipped 300.

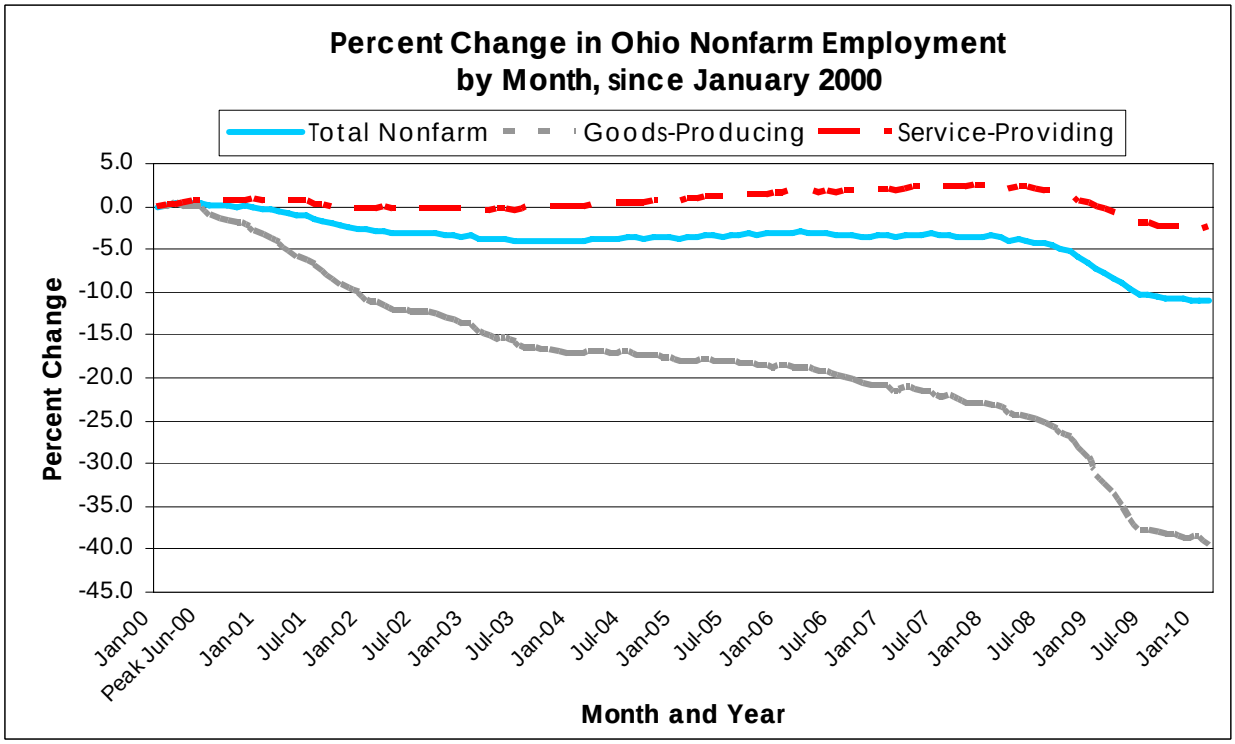
Over the year, nonfarm wage and salary employment decreased 277,700. Goods-producing industries fell 135,100. Manufacturing dropped 104,800 due to declines in durable goods (-84,000) and nondurable goods (-20,800). Construction lost 29,500 jobs. Mining and logging was down 800. Service-providing industries fell 142,600 from fourth quarter 2008. The largest losses were posted in trade, transportation, and utilities (-59,800) and professional and business services (-45,200). The workforce was also lower in financial activities (-14,000), government (-10,000), leisure and hospitality (-8,900), information (-7,200), and other services (-6,300). Educational and health services increased 8,800.

Nonagricultural Wage and Salary Employment Estimates for Ohio[a] Seasonally Adjusted	**Employment** (in thousands)			**Change** (in thousands)		**Percent Change**	
	4th Qtr. 2009	3rd Qtr. 2009	4th Qtr. 2008	From Last Quarter	From Last Year	From Last Quarter	From Last Year
Employer Survey Data[b]							
Total	5,008.3	5,026.6	5,286.0	-18.3	-277.7	-0.4%	-5.3%
Goods-Producing Industries	794.0	800.2	929.1	-6.2	-135.1	-0.8%	-14.5%
Mining and Logging	11.4	11.7	12.2	-0.3	-0.8	-2.6%	-6.6%
Construction	173.8	175.4	203.3	-1.6	-29.5	-0.9%	-14.5%
Manufacturing	608.8	613.1	713.6	-4.3	-104.8	-0.7%	-14.7%
Durable Goods	403.4	404.9	487.4	-1.5	-84.0	-0.4%	-17.2%
Nondurable Goods	205.4	208.2	226.2	-2.8	-20.8	-1.3%	-9.2%
Service-Providing Industries	4,214.3	4,226.4	4,356.9	-12.1	-142.6	-0.3%	-3.3%
Trade, Transportation, and Utilities	953.3	959.9	1,013.1	-6.6	-59.8	-0.7%	-5.9%
Wholesale Trade	215.2	217.6	232.7	-2.4	-17.5	-1.1%	-7.5%
Retail Trade	558.5	558.7	578.6	-0.2	-20.1	0.0%	-3.5%
Transportation, Warehousing, and Utilities	179.6	183.6	201.8	-4.0	-22.2	-2.2%	-11.0%
Information	77.6	79.9	84.8	-2.3	-7.2	-2.9%	-8.5%
Financial Activities	272.8	278.1	286.8	-5.3	-14.0	-1.9%	-4.9%
Finance and Insurance	216.0	217.9	224.0	-1.9	-8.0	-0.9%	-3.6%
Real Estate and Rental and Leasing	56.8	60.2	62.8	-3.4	-6.0	-5.6%	-9.6%
Professional and Business Services	608.5	605.2	653.7	3.3	-45.2	0.5%	-6.9%
Professional and Technical Services	233.2	235.8	248.2	-2.6	-15.0	-1.1%	-6.0%
Management of Companies and Enterprises	107.1	108.2	111.3	-1.1	-4.2	-1.0%	-3.8%
Administrative, Support, and Waste Services	268.2	261.2	294.2	7.0	-26.0	2.7%	-8.8%
Educational and Health Services	828.3	828.0	819.5	0.3	8.8	0.0%	1.1%
Educational Services	108.2	109.1	108.2	-0.9	0.0	-0.8%	0.0%
Health Care and Social Assistance	720.1	718.9	711.3	1.2	8.8	0.2%	1.2%
Leisure and Hospitality	476.1	475.4	485.0	0.7	-8.9	0.1%	-1.8%
Arts, Entertainment, and Recreation	63.9	61.6	62.4	2.3	1.5	3.7%	2.4%
Accommodation and Food Services	412.2	413.8	422.6	-1.6	-10.4	-0.4%	-2.5%
Other Services	211.7	211.7	218.0	0.0	-6.3	0.0%	-2.9%
Government	786.0	788.2	796.0	-2.2	-10.0	-0.3%	-1.3%
Federal Government	77.9	77.9	77.7	0.0	0.2	0.0%	0.3%
State Government	163.7	163.6	164.9	0.1	-1.2	0.1%	-0.7%
Local Government	544.4	546.7	553.4	-2.3	-9.0	-0.4%	-1.6%

[a]Subtotals may not add to totals due to rounding. All data exclude military personnel.

[b]From the Current Employment Statistics Survey, a monthly survey of approximately 12,100 employers conducted by ODJFS in cooperation with the U.S. Bureau of Labor Statistics. Estimates represent nonagricultural wage and salary jobs by place of work.

Trends in Ohio Nonagricultural Wage and Salary Employment



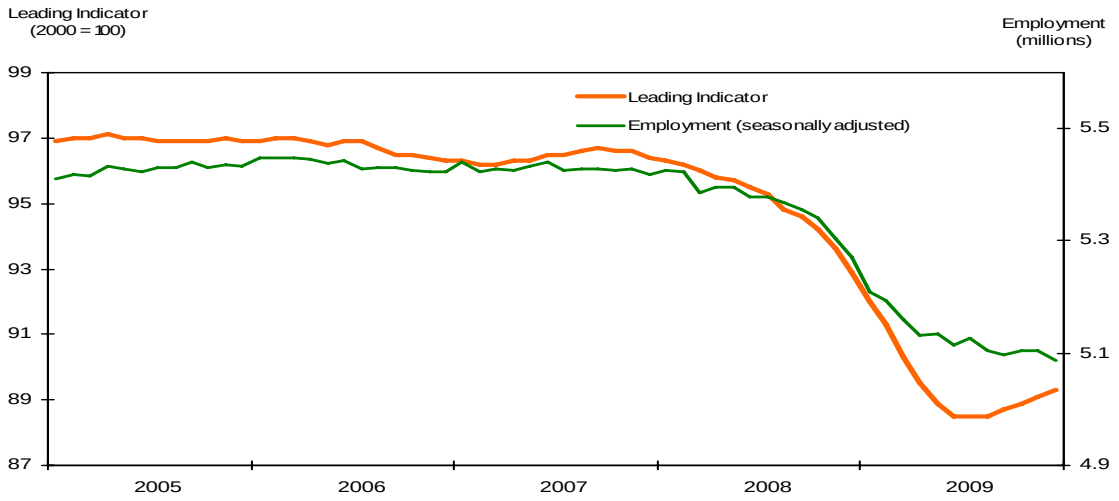
- Since January 2000, Ohio's goods-producing industries (manufacturing, construction and mining and logging) have lost 39.5 percent of their employment while service-providing industries have dropped 2.4 percent.

- In comparison, the U.S. has lost 27.6 percent of the employment in goods-producing industries while service-providing industries increased 5.2 percent.

Leading Indicators: Ohio and U.S. (Seasonally Adjusted)

Ohio's composite index of leading indicators increased from a revised 88.6 to 89.1 for the fourth quarter of 2009. The composite index was lower than for the fourth quarter of 2008. The national composite index of leading economic indicators increased from a revised 102.9 to 105.3, and this was higher than for the fourth quarter of 2008.

Ohio Leading Indicator and Employment



The fourth quarter averages of individual Ohio index components (not seasonally adjusted) were mostly poorer compared to one year ago. Permits and valuation for new housing construction were lower, and the average weekly hours for manufacturing production were lower than for the fourth quarter of 2008. Initial claims for unemployment insurance were lower, which was positive.

Economic Indicators	Data			Change		Percent Change	
	4th Qtr. 2009	3rd Qtr. 2009	4th Qtr. 2008	From Last Quarter	From Last Year	From Last Quarter	From Last Year
Ohio							
Leading Indicator Index (2000=100)	89.1	88.6	93.6	0.5	-4.5	0.6%	-4.8%
Average Initial Claims for Unemployment Insurance	93,324	81,830	113,215	11,494	-19,891	14.0%	-17.6%
Average Weekly Hours for Manufacturing	39.7	39.4	40.2	0.3	-0.5	0.8%	-1.2%
Average Valuation of Housing Permits (millions of dollars)	173.456	216.097	203.386	-42.641	-29.930	-19.7%	-14.7%
Average Number of Housing Permits	1,063	1,249	1,419	-186	-356	-14.9%	-25.1%
National Data							
National Composite Index of Leading Economic Indicators (1996=100)	105.3	102.9	99.1	2.4	6.2	2.3%	6.3%
U.S. Domestic Auto Production (annualized in millions)	2.877	2.537	3.254	0.340	-0.377	13.4%	-11.6%
Difference between 10-Year and 1-Year Treasuries, Constant Maturities	3.11	3.07	2.26	0.04	0.85	1.3%	37.6%
Average Number of Housing Permits	44,884	52,812	47,273	-7,928	-2,389	-15.0%	-5.1%

Jobs Gained or Lost

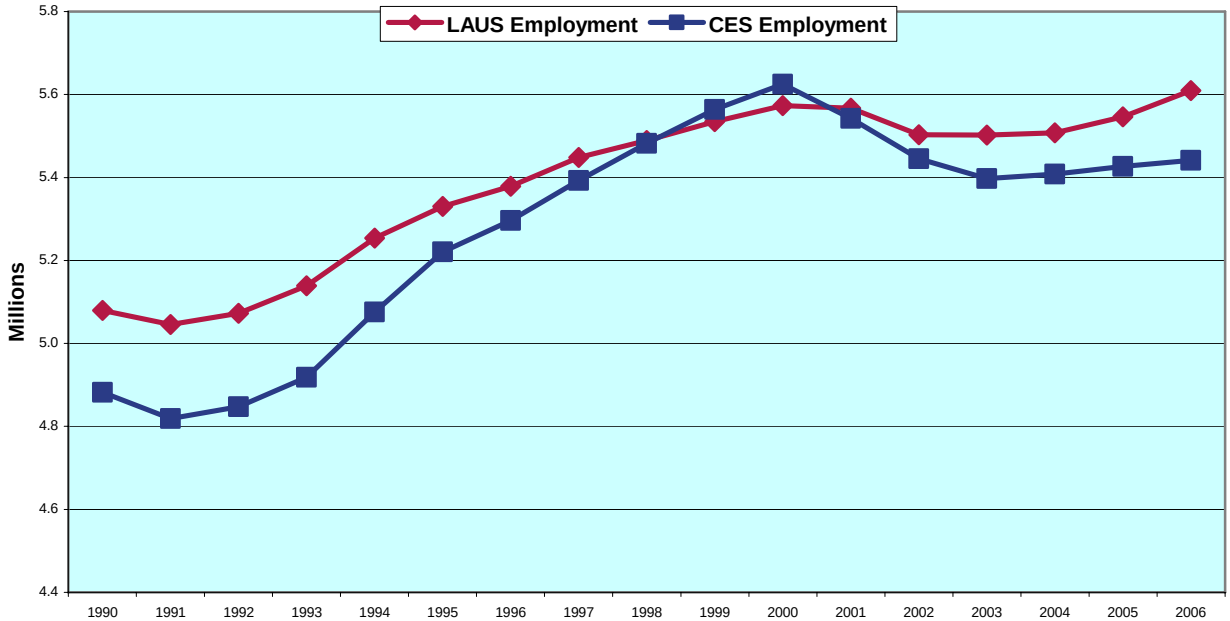
Current Employment Survey (CES)

The most reliable and most easily understood statistic on jobs is the nonagricultural wage and salary employment which comes from the Current Employment Survey (see the Technical Notes section for more detail). This business establishment survey tracks most closely with business cycle changes and is the statistical source most heavily relied on by labor economists, including those at the Bureau of Labor Statistics. It provides information on jobs lost or gained from month-to-month and over the year. The trend in nonagricultural employment is CES data. Of course, there is considerable dynamic activity behind these figures in respect to job changes, layoffs and hiring activity, which in themselves are not represented in the net job statistic.

Local Area Unemployment Statistics (LAUS) and Current Population Survey (CPS)

The employment numbers published under the Employment Situation Indicators chart for Ohio (LAUS data) earlier in this packet are heavily dependent on the Current Population Survey (often referred to as the "Household" survey). These figures are useful for understanding the unemployment rate and can be useful for the labor economist's analysis of what is happening in the labor market. However, as a general measure of job growth or decline and corresponding public announcements, it has proven problematic. The CPS for Ohio contains a small sample of households, tends to be highly volatile and is benchmarked (i.e., controlled to a known universe) only once every 10 years with the decennial census. It has not proven to be a good measure of business cycles. For example, the LAUS employment numbers showed only a slight decline at the onset of the 2001 recession and a much more rapid recovery in 2005 and 2006 than indicated by the CES data (see chart below). The LAUS data have no measure of job loss or gain by industry.

Ohio LAUS and CES Employment Trends, 1990-2006



Mass Layoff Announcements

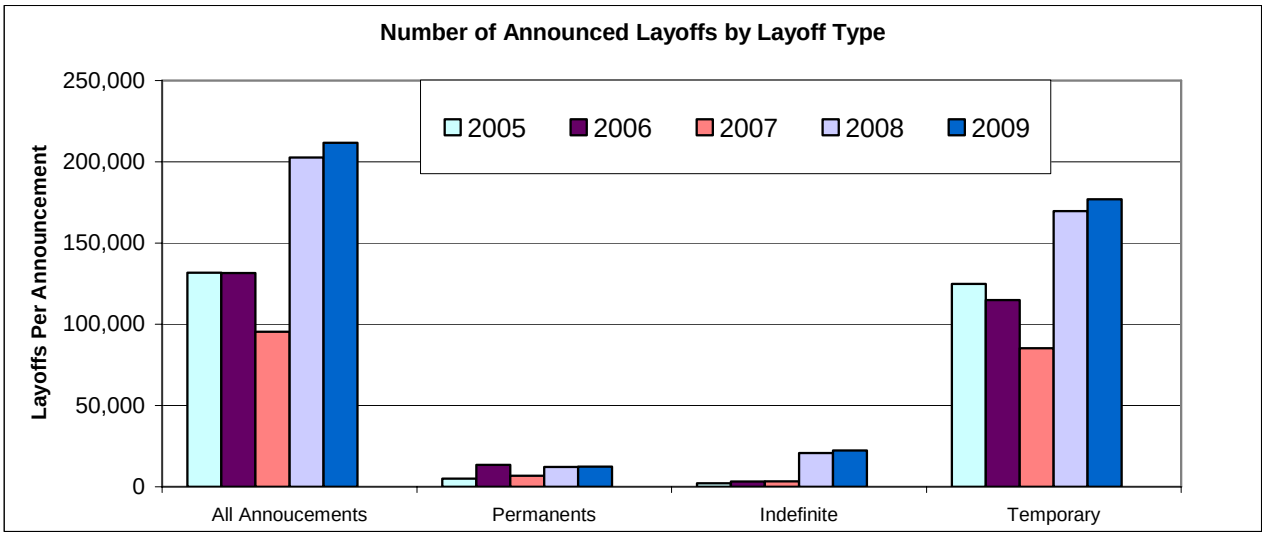
Mass layoff announcements are reported by the business entity. These statistics have proven useful to explain major shifts in the employment situation that may occur at the local level from one month to another. However, they must be used with caution, particularly when considering them at a summary level or as a state-wide indicator. These statistics have the following caveats.

- ODJFS requests employers to provide the greatest number of workers potentially affected and actual numbers are normally less.
- Any employer may announce mass layoffs multiple times and/or for multiple locations over the year.
- There is no formal process or monitoring to assure consistent reporting.
- These numbers are reported "intent" and are never independently verified.
- They may be reported but then circumstances change that decrease the size of the layoff or eliminate the need for a layoff.
- Even if a layoff materializes, it does not necessarily mean people are unemployed as a result. They may retire, work part time, take severance pay or find another job.
- A number of the reported layoffs are part of a normal business cycle, where the business normally restricts operations for product change-over, inventory processes or because of seasonal demand cycles.
- Some layoffs are very short lived, while others could take a year or more to complete. There is no precise measure of timing.

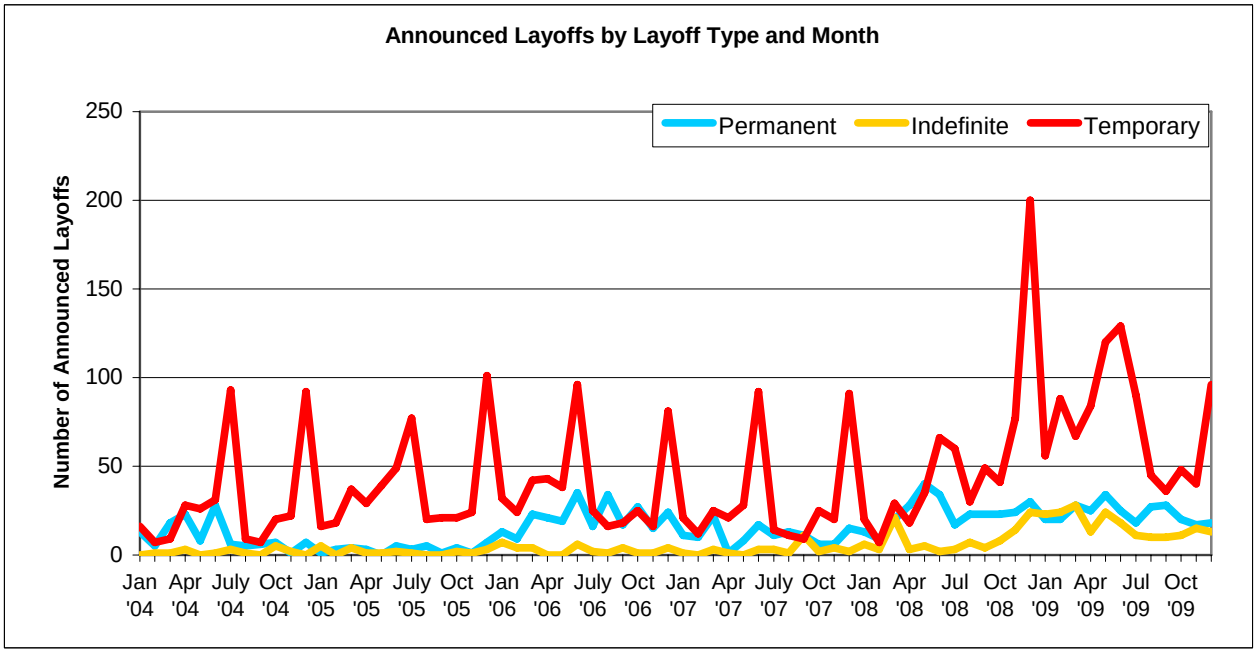
See Mass Layoff Announcements table and graph on next page.

Mass Layoff Announcements, 2004 to 2009

	Layoff Annoucements		Permanent Layoffs		Indefinite Layoffs		Temporary Layoffs	
Year	Events	Employees	Events	Employees	Events	Employees	Events	Employees
2004	504	100,098	127	12,240	17	1,781	360	86,077
2005	509	131,712	37	4,894	20	2,072	452	124,746
2006	743	131,628	253	13,481	34	3,224	456	114,923
2007	531	95,454	131	6,822	31	3,331	369	85,301
2008	1,016	202,657	284	12,305	100	20,671	632	169,681
2009	1,379	211,641	280	12,354	200	22,282	899	177,005



The graph below is an example of the highly seasonal nature of these mass layoff announcements.



Related Information

Related Information

IHS Global Insight Analysis:
IHS Global Insight expects 2.6 percent growth for first quarter 2010. This is slower than the fourth quarter 2009 rate of 5.9 percent. IHS Global Insight believes that the February decline in jobs was largely due to the weather and that the labor market is beginning to improve with modest hiring. An improving job market should increase consumer spending, although it will be constrained by high debt and tight credit. Consumer spending is expected to increase 2.6 percent in the first quarter, up from 1.7 percent in fourth quarter 2009. Single-family housing activity has slumped—the extended tax credit appears to be having limited effect. Spending on business equipment and software is expected to slow during the first quarter after a very good fourth quarter 2009, but overall it is expected to grow 8.9 percent for 2010.

Other Economic Indicators:
The Conference Board's Employment Trends Index increased in February for the sixth consecutive month. The Index stands at 93.5, up from 93.2 in January. February's increase in the ETI was driven by positive contributions from four of its eight components: Number of Temporary Employees, Job Openings, Industrial Production, and Real Manufacturing and Trade Sales.

An analysis by the Federal Reserve Bank of Cleveland found that the typical bottoming out in employment during previous downturns in the business cycle occurred 15 months after a peak in employment, and it takes about 35 months for employment to return to peak levels. Currently, Ohio employment has yet to bottom out 24 months after the last peak, which suggests a long recovery period for this recession.

Technical Notes

Data Sources and Additional Resources Links

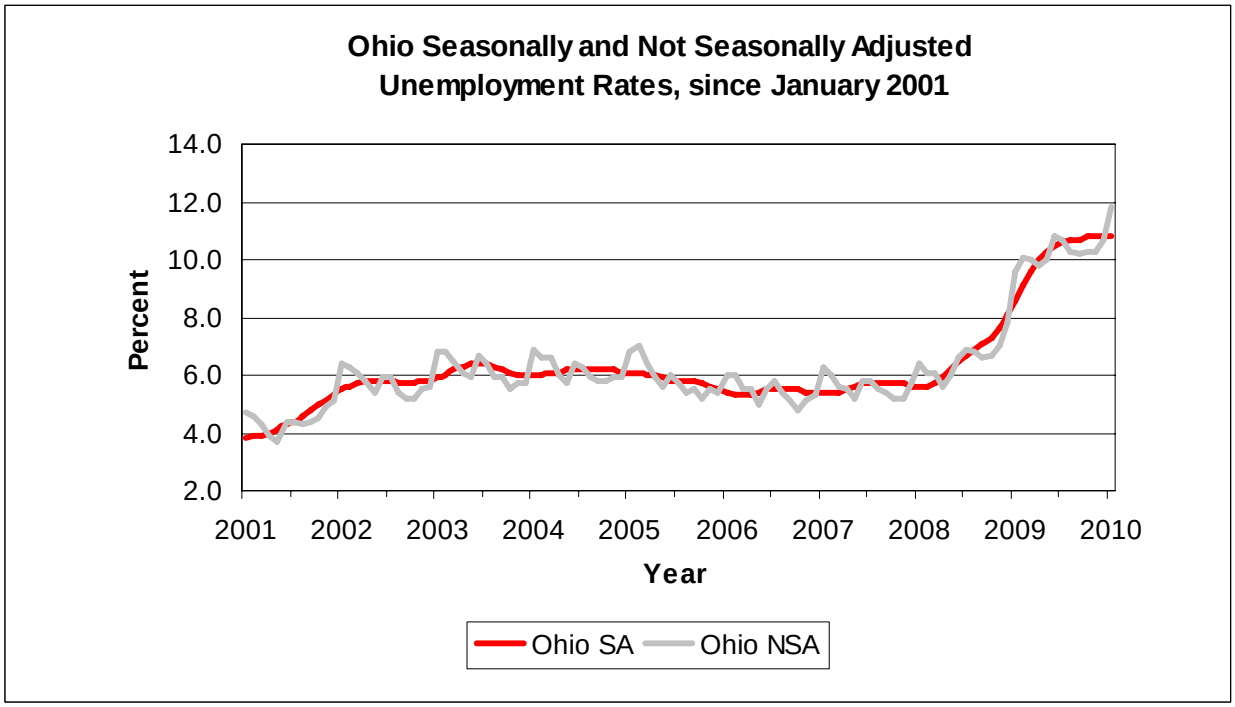
Seasonal Adjustment

Ohio and U.S. unemployment rates and labor force data are published monthly by the BLS. Two sets of data are published: seasonally adjusted data and not seasonally adjusted data. County data are not seasonally adjusted because seasonal adjustment factors tend to be unreliable for small areas.

Seasonal adjustment is used to remove fluctuations in unemployment and labor force trends that normally occur with changes in the season. The removal of seasonal variation allows evaluation of the unemployment rates as an indicator of economic change.

Seasonal variation in the employment situation occurs for a variety of natural and institutional reasons. Examples include reduction of employment involving outdoor activities during winter, large changes in labor force and unemployment levels with opening and closing of schools, and employment reductions during the automobile model changeover period. The overall impact of such events is a seasonal rise in unemployment rates during the winter months, usually peaking in January and February, and a drop in unemployment rates during the spring and late summer with May and September typically the low months.

The graph below presents the wide month-to-month changes that occur in the not seasonally adjusted data which reinforces our use of seasonally adjusted data, when available.



Unemployment Rates and Related Data

Employment Situation: Ohio and U.S

U.S. data are derived from a national household survey known as the Current Population Survey (CPS). This survey is conducted monthly by the U.S. Bureau of the Census for the U.S. Bureau of Labor Statistics (BLS). The survey collects data on the demographic characteristics and labor force status of household members, including employment and unemployment from approximately 60,000 households.

Ohio data are developed in cooperation with the BLS using the State Time Series Analysis and Review System (STARS). This method relies heavily on monthly unpublished CPS data as well as current wage and salary employment and unemployment insurance statistics. The time series model is designed to provide data on employment of all types of workers, based on place of residence.

Ohio Monthly Unemployment Insurance Initial Claims

Initial claims information was obtained from administrative records of the Ohio unemployment compensation program, operated by the Ohio Department of Job and Family Services.

An initial claim is defined as any notice of unemployment filed to request a determination of entitlement to and eligibility for compensation, or to begin a second or subsequent period of eligibility within a benefit year. Initial claims counts presented in this report include new, additional, transitional, and interstate agent claims. Beginning in January 2005, transitional claims are excluded from counts since they do not represent newly unemployed workers.

Average Duration of Unemployment and Unemployment Insurance Benefit Exhaustions: Ohio and U.S

Average duration of unemployment was calculated as the total number of weeks compensated for the previous 12 months divided by the total number of first payments for the same 12 month period. First payment is defined as the first payment in a benefit year for a week of unemployment.

Exhaustion rates were calculated as the number of claimants exhausting benefits divided by the number of claimants' first receiving benefits two quarters earlier.

Quarterly totals for average duration of unemployment and number of exhaustions in the U.S. and Ohio were obtained from the U.S. Department of Labor, Employment and Training Administration (ETA). The national ETA office collects unemployment data from the states, then compiles and redistributes state and national unemployment insurance statistics through a required reporting mechanism in which all states participate.

The Claims and Payment Activities report (ETA-5159) serves as the basis for these figures. The DOL-ETA site is listed below.
http://workforcesecurity.doleta.gov/unemploy/content/data.asp

Unemployment Rates for U.S. and Eight Largest States

The unemployment rates presented are the most recent seasonally adjusted data available from BLS for the nation's eight most populated states. This graph includes data for the three months prior to the current reference month because some the states presented release data after the Ohio release date. URL web links for each State are present below and are the quickest source of the most current data.

California	http://www.labormarketinfo.edd.ca.gov
Florida	http://www.labormarketinfo.com/laus/
Illinois	http://lmi.ides.state.il.us/laus/illaus_seasadj.htm
Michigan	http://www.milmi.org/
New York	http://www.labor.state.ny.us/
Ohio	http://ohiolmi.com/laus/current.htm
Pennsylvania	http://www.paworkstats.state.pa.us
Texas	http://www.tracer2.com/

Ohio County Unemployment Rates

Ohio sub-state employment and unemployment estimates are developed using a complex "building-block" methodology, prescribed by BLS, The methodology creates first approximation estimates of the employed and unemployed which are then proportionately adjusted so that they add to the state totals. A more complete statement of methodology may be found at: http://ohiolmi.com/LAUS/Concepts.htm.

Data for Ohio's sub-state areas are not seasonally adjusted because seasonal adjustment factors for small areas tend to be unreliable.

Employment Data

Ohio Nonagricultural Wage and Salary Employment

Ohio nonfarm employment data are derived from an employer survey known as the Current Employment Survey (CES). This survey is conducted monthly by ODJFS/BLMI, in cooperation with the BLS. The data are compiled from voluntary reports from 11,800 Ohio employers. The employer survey provides data on total employment, and on hours and earnings of production workers, by type of industry.

The employer survey does not include the self-employed, unpaid family workers, private household workers, agricultural workers, or those on strike or unpaid vacation and are based on place of work. Analysts generally regard the nonfarm data as the most reliable indicator of the current economic conditions due to its large sample size and the fact that the data are benchmarked annually to the complete count of employment from administrative unemployment insurance records.

Trends in Ohio Nonagricultural Wage and Salary Employment

Goods-producing industries include natural resources and mining, construction, and manufacturing. Service-providing industries include trade, transportation and utilities, information, financial activities, professional and business services, educational and health services, leisure and hospitality, other services, and government.

Web Links for additional information

U.S. Bureau of Labor Statistics site: http://www.bls.gov
Ohio Bureau of Labor Market Information site: http://ohiolmi.com

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Bureau of Labor Market Information
Business Principles for Workforce Development

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Develop and deploy new information solution tools and systems for the workforce and economic development community.

Provide products and services that are customer and demand driven.

Be known as an important and reliable source for information solutions that support workforce development goals and outcomes.

This quarterly report was prepared by the Ohio Department of Job and Family Services to meet the requirements of the Ohio Revised Code 6301.10.

For further information, visit http://OhioLMI.com or call the Ohio Bureau of Labor Market Information at 1-888-296-7541.

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