

The Vermont Labor Market Quarterly

A newsletter of the Economic & Labor Market Information Division of the Vermont Department of Labor

July, 2017

County Level Changes in Private Employment Since the Recession

The state of Vermont's lowest employment levels during the most recent recession occurred in 2009. During that year, covered employment averaged 292,370. The number of jobs has increased steadily since then – by 2016, average covered employment stood at 307,969, an increase of 5.3%. The private sector was responsible for 97.2% of those jobs. Goods producing industries added 1,014 jobs while service providers added 14,153. The industry super-sector with the largest private-sector increase over the period was Professional & Business Services which added over 5,800 private-sector jobs. Education & Health Services was second with the addition of 5,259 jobs followed by Leisure and Hospitality with 4,555. On a percentage basis the biggest gains were in Professional & Business Services (26.6%), Natural Resources & Mining (22.6%) and Leisure and Hospitality (14.4%). The largest losses are found in Manufacturing (-1,235 jobs or -4.0%), Information (-868 jobs or -15.8%) and Trade, Transportation & Utilities (-594 jobs or -1.1%).

Statewide gains mask significant differences at the county level. Some counties experienced significant employment growth while others have seen declines. The growth in Chittenden and surrounding counties has outpaced the state average significantly. Meanwhile Bennington, Caledonia and Essex Counties had lower employment in 2016 than in 2009. One bright spot outside of Northwest Vermont is Orleans County, where employment has increased 12.8%.

It is perhaps not surprising that the largest gains in employment can be found in Vermont's most densely populated county, Chittenden, where 8,505 jobs were added. In percentage terms, the largest additions were in Lamoille county at 15.0%. Caledonia County experienced the greatest losses at -264 while the largest percentage decline was 24.2% in Essex County.

The largest percentage growth by industry and county was Accommodation & Food Service in Orleans, which experienced 72% growth over the period (an increase of 575 jobs). Transportation & Warehousing in Orleans experienced the second fastest growth rate at 30.7% (+73 jobs). Health Care & Social Assistance in Lamoille increased 25.3%. The largest decline by industry and county was Professional & Technical Services in Orleans, which declined by 35.6% (-145 jobs).

The largest nominal gains were in Chittenden, where Health Care & Social Assistance grew by 1,724 jobs; Professional and Technical Services increased by 1,556 and Accommodation & Food Service increased by 1,532. Outside of Chittenden, the largest nominal growth was in Franklin county's Administrative & Waste Management (+823).

The largest nominal losses were in Chittenden County Manufacturing (-938), Franklin County Information (-404) and Rutland County Retail Trade (-375)

Two important notes about the data discussed here:

1. Counts of total jobs (or employment) referenced here include all industries. Comparisons of industry growth only include data about industries that meet publishable standards. Any data that would identify employment and/or wage data about an individual firm is confidential and not published.
2. Over time a business's primary focus within a region may change. For example, a small Vermont manufacturer might expand production in another state or country while maintaining headquarters here in Vermont. In that case, the data would show a decline in Manufacturing employment and an increase in Management of Companies employment due to an industry reclassification. This means changes in industry employment are gross concepts and not net changes.

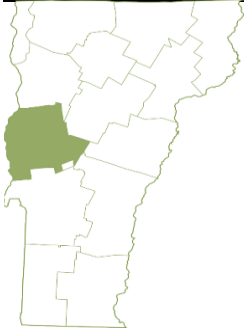
The Economic & Labor Market Information Division (ELMI) of the VT Department of Labor is a primary source of labor market information in Vermont. We produce information about current employment patterns, labor market trends and workforce utilization for the state and various sub-state geographies. ELMI administers labor market data programs in collaboration with our federal partners at the Bureau of Labor Statistics and the Employment & Training Administration.

Labor Market Information Quarterly

Private Sector Employment and Wage changes by County, 2009 – 2016

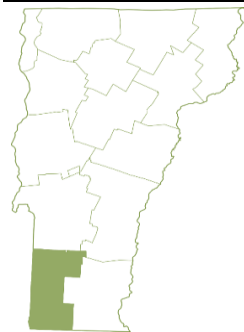
Note: All data comparisons are among sectors that meet publishing standards only

Addison County



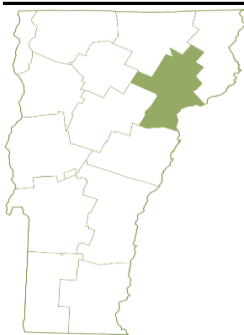
2009 Covered Employment	11,810
2016 Covered Employment	12,996 (+10.0%)
Change in Employment, 2009 – 2016	1,186
Change in Establishments, 2009 – 2016	32
2009 Average Annual Nominal Wage	\$37,338
2016 Average Annual Nominal Wage	\$45,839
Largest Industry Gain (nominal)	Construction (+162)
Largest Industry Gain (average annual growth rate)	Mining (13.2%)
Largest Industry Losses (nominal):	Transport & Warehousing (-28)
Largest Industry Losses (average annual growth rate):	Transport & Warehousing (-1.2%)

Bennington County



2009 Covered Employment:	14,788
2016 Covered Employment:	14,709 (-0.5%)
Change in Employment, 2009 – 2016:	-79
Change in Establishments, 2009 – 2016:	-67
2009 Average Annual Nominal Wage:	\$37,338
2016 Average Annual Nominal Wage:	\$45,839
Largest Industry Gain (nominal)	Administrative & Waste Services (+243)
Largest Industry Gain (average annual growth rate)	Administrative & Waste Services (+6.3%)
Largest Industry Losses (nominal):	Retail Trade (-317)
Largest Industry Losses (average annual growth rate):	Information (-4.4%)

Caledonia County



2009 Covered Employment:	8,964
2016 Covered Employment:	8,700 (-2.9%)
Change in Employment, 2009 – 2016:	-264
Change in Establishments, 2009 – 2016:	-10
2009 Average Annual Nominal Wage:	\$33,442
2016 Average Annual Nominal Wage:	\$38,079
Largest Industry Gain (nominal)	Health Care & Social Assistance (+135)
Largest Industry Gain (average annual growth rate)	Real Estate and Rental and Leasing (3.2%)
Largest Industry Losses (nominal):	Manufacturing (-168)
Largest Industry Losses (average annual growth rate):	Professional & Technical Services (-6.1%)

Chittenden County



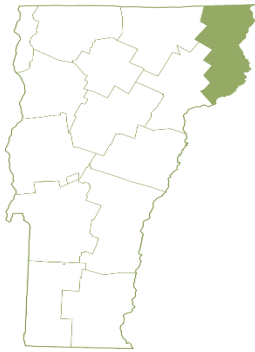
2009 Covered Employment:	76,521
2016 Covered Employment:	85,026 (+11.1%)
Change in Employment, 2009 – 2016:	8,505
Change in Establishments, 2009 – 2016:	733
2009 Average Annual Nominal Wage:	\$44,799
2016 Average Annual Nominal Wage:	\$50,693
Largest Industry Gain (nominal)	Health Care & Social Assistance (+1,724)
Largest Industry Gain (average annual growth rate)	Management of Companies (+19.8%)
Largest Industry Losses (nominal):	Manufacturing (-938)
Largest Industry Losses (average annual growth rate):	Manufacturing (-1.3%)

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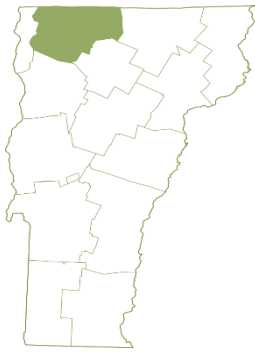
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Essex County



2009 Covered Employment:	836
2016 Covered Employment:	634 (-24.2%)
Change in Employment, 2009 – 2016:	-202
Change in Establishments, 2009 – 2016:	-5
2009 Average Annual Nominal Wage:	\$24,195
2016 Average Annual Nominal Wage:	\$33,039
Largest Industry Gain (nominal)	<i>Insufficient data</i>
Largest Industry Gain (average annual growth rate)	<i>Insufficient data</i>
Largest Industry Losses (nominal):	<i>Insufficient data</i>
Largest Industry Losses (average annual growth rate):	<i>Insufficient data</i>

Franklin County



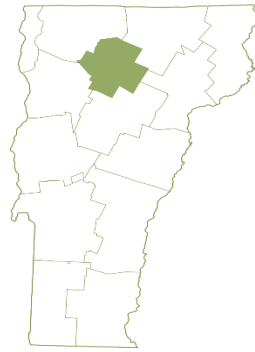
2009 Covered Employment:	12,186
2016 Covered Employment:	13,448 (+10.4%)
Change in Employment, 2009 – 2016:	1,262
Change in Establishments, 2009 – 2016:	47
2009 Average Annual Nominal Wage:	\$35,184
2016 Average Annual Nominal Wage:	\$41,000
Largest Industry Gain (nominal)	Administrative & Waste Mgmt (+823)
Largest Industry Gain (average annual growth rate)	Administrative & Waste Mgmt (+15.2%)
Largest Industry Losses (nominal):	Information (-404)
Largest Industry Losses (average annual growth rate):	Information (-20.4%)

Grand Isle County



2009 Covered Employment:	819
2016 Covered Employment:	870 (+6.2%)
Change in Employment, 2009 – 2016:	51
Change in Establishments, 2009 – 2016:	-10
2009 Average Annual Nominal Wage:	\$29,872
2016 Average Annual Nominal Wage:	\$32,001
Largest Industry Gain (nominal)	<i>Insufficient data</i>
Largest Industry Gain (average annual growth rate)	<i>Insufficient data</i>
Largest Industry Losses (nominal):	<i>Insufficient data</i>
Largest Industry Losses (average annual growth rate):	<i>Insufficient data</i>

Lamoille County



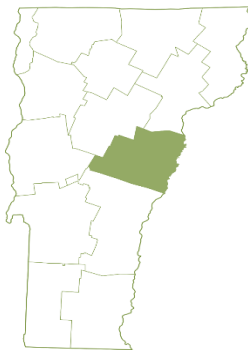
2009 Covered Employment:	8,865
2016 Covered Employment:	10,197 (+15.0%)
Change in Employment, 2009 – 2016:	1,332
Change in Establishments, 2009 – 2016:	0
2009 Average Annual Nominal Wage:	\$31,229
2016 Average Annual Nominal Wage:	\$37,861
Largest Industry Gain (nominal)	Accommodation & Food Service (+535)
Largest Industry Gain (average annual growth rate)	Health Care & Social Assistance (+3.3%)
Largest Industry Losses (nominal):	Professional & Technical Services (-66)
Largest Industry Losses (average annual growth rate):	Professional & Technical Services (-2.4%)

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Private Sector Employment and Wage changes by County, 2009 – 2016

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Orange County



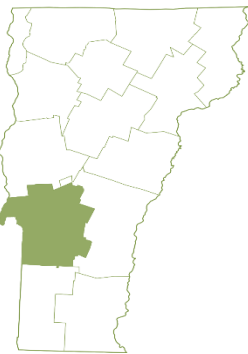
2009 Covered Employment:	5,589
2016 Covered Employment:	5,770 (+3.2%)
Change in Employment, 2009 – 2016:	181
Change in Establishments, 2009 – 2016:	-4
2009 Average Annual Nominal Wage:	\$32,199
2016 Average Annual Nominal Wage:	\$38,024
Largest Industry Gain (nominal)	Health Care & Social Assistance (+206)
Largest Industry Gain (average annual growth rate)	Professional & Technical Services (-3.6%)
Largest Industry Losses (nominal):	Finance & Insurance (-73)
Largest Industry Losses (average annual growth rate):	Real Estate and Rental & Leasing (-11.3%)

Orleans County



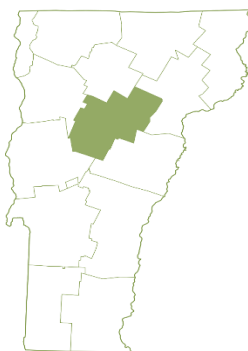
2009 Covered Employment:	7,699
2016 Covered Employment:	8,690 (+12.9%)
Change in Employment, 2009 – 2016:	991
Change in Establishments, 2009 – 2016:	-17
2009 Average Annual Nominal Wage:	\$29,132
2016 Average Annual Nominal Wage:	\$34,158
Largest Industry Gain (nominal)	Accommodation & Food Service (+575)
Largest Industry Gain (average annual growth rate)	Accommodation & Food Service (+8.05%)
Largest Industry Losses (nominal):	Administrative & Waste Mgmt (-85)
Largest Industry Losses (average annual growth rate):	Administrative & Waste Mgmt (-4.8%)

Rutland County



2009 Covered Employment:	22,948
2016 Covered Employment:	23,049 (+0.4%)
Change in Employment, 2009 – 2016:	101
Change in Establishments, 2009 – 2016:	-31
2009 Average Annual Nominal Wage:	\$35,240
2016 Average Annual Nominal Wage:	\$40,992
Largest Industry Gain (nominal)	Health Care & Social Assistance (+495)
Largest Industry Gain (average annual growth rate)	Management of Companies (+45.7%)
Largest Industry Losses (nominal):	Retail Trade (-375)
Largest Industry Losses (average annual growth rate):	Utilities (-4.7%)

Washington County



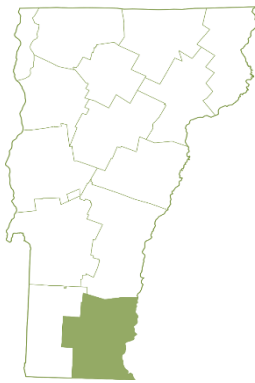
2009 Covered Employment:	24,099
2016 Covered Employment:	25,402 (+5.4%)
Change in Employment, 2009 – 2016:	1,303
Change in Establishments, 2009 – 2016:	101
2009 Average Annual Nominal Wage:	\$38,369
2016 Average Annual Nominal Wage:	\$46,942
Largest Industry Gain (nominal)	Accommodation & Food Service (+545)
Largest Industry Gain (average annual growth rate)	Management of Companies (+48.9%)
Largest Industry Losses (nominal):	Information (-216)
Largest Industry Losses (average annual growth rate):	Information (-6.4%)

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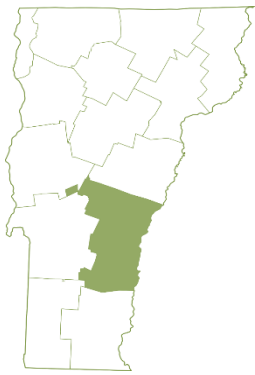
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Windham County



2009 Covered Employment:	18,615
2016 Covered Employment:	19,193 (+3.1%)
Change in Employment, 2009 – 2016:	578
Change in Establishments, 2009 – 2016:	-48
2009 Average Annual Nominal Wage:	\$36,191
2016 Average Annual Nominal Wage:	\$40,581
Largest Industry Gain (nominal)	Health Care and Social Assistance (+498)
Largest Industry Gain (average annual growth rate)	Administrative and Waste Mgmt (+5.6%)
Largest Industry Losses (nominal):	Information (-100)
Largest Industry Losses (average annual growth rate):	Information (-5.5%)

Windsor County



2009 Covered Employment:	17,907
2016 Covered Employment:	18,217 (+1.7%)
Change in Employment, 2009 – 2016:	310
Change in Establishments, 2009 – 2016:	-4
2009 Average Annual Nominal Wage:	\$34,536
2016 Average Annual Nominal Wage:	\$40,844
Largest Industry Gain (nominal)	Health Care & Social Assistance (+234)
Largest Industry Gain (average annual growth rate)	Utilities (+6.3%)
Largest Industry Losses (nominal):	Professional & Technical Services (-309)
Largest Industry Losses (average annual growth rate):	Transportation & Warehousing (-5.2%)

Vermont



2009 Covered Employment:	292,370
2016 Covered Employment:	307,969 (+5.3%)
Change in Employment, 2009 – 2016:	15,599
Change in Establishments, 2009 – 2016:	347
2009 Average Annual Nominal Wage:	\$38,767
2016 Average Annual Nominal Wage:	\$45,059
Largest Industry Gain (nominal)	Health Care & Social Assistance (+4,428)
Largest Industry Gain (average annual growth rate)	Management of Companies (+400.7%)
Largest Industry Losses (nominal):	Durable Goods Manufacturing (-3,498)
Largest Industry Losses (average annual growth rate):	Utilities (-23.5%)

Local Area Unemployment Statistics

The Local Area Unemployment Statistics (LAUS) program produces monthly and annual employment, unemployment, and labor force data for Census regions, states, counties, metropolitan areas, and towns by place of residence. Estimates are derived from a monthly survey of approximately 1,200 Vermont households as part of the Current Population Survey as well as unemployment insurance claims.

Unemployment Rate (not seasonally adjusted)		
County	Jan-17	May-17
Vermont	3.1	3.1
Addison	2.5	3.6
Bennington	3.4	3.8
Caledonia	3.4	4.8
Chittenden	2.2	2.4
Essex	4.5	6.5
Franklin	2.8	3.6
Grand Isle	3.2	5.2
Lamoille	4.0	4.8
Orange	2.7	4.0
Orleans	4.8	7.0
Rutland	3.7	3.9
Washington	2.7	3.9
Windham	3.6	3.2
Windsor	2.7	2.7

Continuing with the theme of county-level assessment, this section reviews changes in the labor force over the first five months of 2017 at both the state and county levels. The statewide, seasonally adjusted unemployment rate for Vermont stood at 3.1% in January. While it briefly fell to 3.0% in February and March it is once again at 3.1% as of May, 2017. The civilian labor force grew by 1,450 between January and March but has since declined to 346,350, 300 higher than the January figure. Employment was the same in January and May, 335,450. Meanwhile the number of unemployed persons increased by 250.

The data for sub-state areas (including counties) is not seasonally adjusted. January data showed the lowest unemployment rate to be in Chittenden County at 2.4%. It has since increased to 2.2%, still the lowest rate in the state. Orleans County had the highest rate in January (7.0%) and that trend continued into May, but that rate has since fallen to 4.8%, the largest percentage point decline in the state. Other counties that saw significant declines over the period include Grand Isle (down 2.0), Essex (down 2.0) and Caledonia (down 1.4). The only counties to experience an increase in the unemployment rate over the period was Windham where the rate increased 0.4 points.

Windham County experienced the largest drop in Labor Force, a decline of 1,050. Windsor saw the second largest drop, -850. The largest gains in labor force were found in Addison County (+250). Overall, ten counties saw labor force declines; Two saw labor force increases (Addison & Franklin) and two were unchanged (Caledonia and Orange).

The number of unemployed persons declined in every county except Windham (+100). The largest declines in the number of unemployed person were in Washington County (-400) followed by Orleans (-300), Chittenden (-250) and Franklin (-250).

Current Employment Statistics

Seasonally adjusted statewide nonfarm payroll employment decreased by 2,200 over the first five months of the year. Private-Sector employment declined by 2,300 while Government increased by 100. The largest statewide gains were found in Transportation, Warehousing & Utilities where payroll employment increased by 500. Arts, Entertainment & Recreation employment increased by 300. Other industries that experienced growth include Real Estate, Rental & Leasing (+100), Administrative & Waste Services (+100), Private Education Services (+100) and State Government (+300).

Over the year (May to May) the Vermont economy added 1,700 jobs. Nine hundred of those were private sector. The largest areas of growth were Leisure & Hospitality (+1,400), Education & Health Services (+800) and Local Government (+800). The most significant declines were in Durable Goods Manufacturing (-1,200) followed by Retail Trade (-300) and Financial Activities (-300).

Seasonally adjusted total nonfarm payroll employment in the Burlington – South Burlington Labor Market Area declined by 800 during the first five months of the year. In the unadjusted series the largest gains were found in Professional & Business Services (+1,000), Mining, Logging & Construction (+700) and Leisure & Hospitality (+600). The largest losses were in State Government Education (-1,100) and Education & Health Services (-400).

Career Planning and Employment Data Resources

The VT Department of Labor has a wide range of resources available to Vermonters seeking to find work, change careers or just explore opportunities. Our staff work to connect Vermont businesses with qualified employees and offer innovative programs to help train motivated individuals. The Economic & Labor Market Information Division houses data related to occupations, industries, wages, income and labor force utilization for the state and various sub-state geographies.

Career Exploration Resources

American Job Centers: The Vermont Department of Labor has 12 Career Resource Centers throughout the state. These centers can assist with job searches and provide access to online resources. www.labor.vermont.gov/workforce-development

Start Where You Are explores the variety of occupations available to Vermonters and offers guidance on where to receive the requisite education and training. www.startwhereyouarevt.org

My Skills My Future is a place to manage your career and create a pathway to success. Tools are available to help students, businesses and career professionals. www.careeronestop.org

My Next Move helps young people and those changing careers make informed decisions about career choices, including a unique exploration tool that allows the user to search by interests and training. www.mynextmove.org

Vermont Job Link is a free, self-service job matching system for jobseekers and employers. Job seekers can post a resume and apply for positions directly from the site. Job Link is hosted by the VT Department of Labor. www.vermontjoblink.com

For questions about this newsletter or for more information, please reach us at:

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Email: labor.lmi@vermont.gov

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Resources for Employers

Vermont Small Business Development Center is a source for no-cost business advising and low-cost training for Vermont entrepreneurs. www.vtsbdc.org

The Agency of Commerce and Community Development is a source for information about starting, expanding and relocating a business in VT. www.accd.vermont.gov/business

Economic & Labor Market Data

From our homepage at www.vtlmi.info, Vermonters can access a wide range of labor market data. This includes all of the background data for sections of this newsletter as well as occupational and industrial projections, wage ranges and quintiles by occupation, fringe benefits comparisons, per capita incomes, an employer database, quarterly workforce indicators and assorted related data. Other sources for labor market data include:

The United States Bureau of Labor Statistics
www.bls.gov

The Employment and Training Administration
www.doleta.gov

Vermont Department of Labor
www.labor.vermont.gov