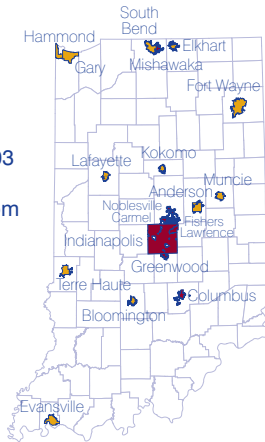


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Indiana's 20 Largest Cities

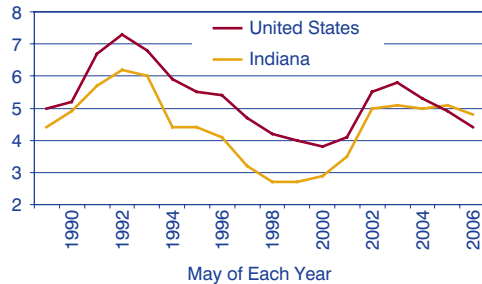
Indianapolis remained the state's largest city in 2005 with more than 784,000 people. With the addition of nearly 2,000 new residents between 2003 and 2004, Noblesville bumped Richmond from the top 20.



Population Change 2000 to 2005
 ■ Gained Population (8)
 ■ Lost Population (12)
 *Change is from April 1, 2000 to July 1, 2005, using the estimates base.

May Unemployment

The gap between national and state unemployment rates widened from May 2005 to 2006. Indiana's 4.8 percent unemployment rate remained 0.4 percentage points higher than the nation (compared to a difference of only 0.2 percentage points last year).



*not seasonally adjusted

Hoosier Hot 50 Jobs

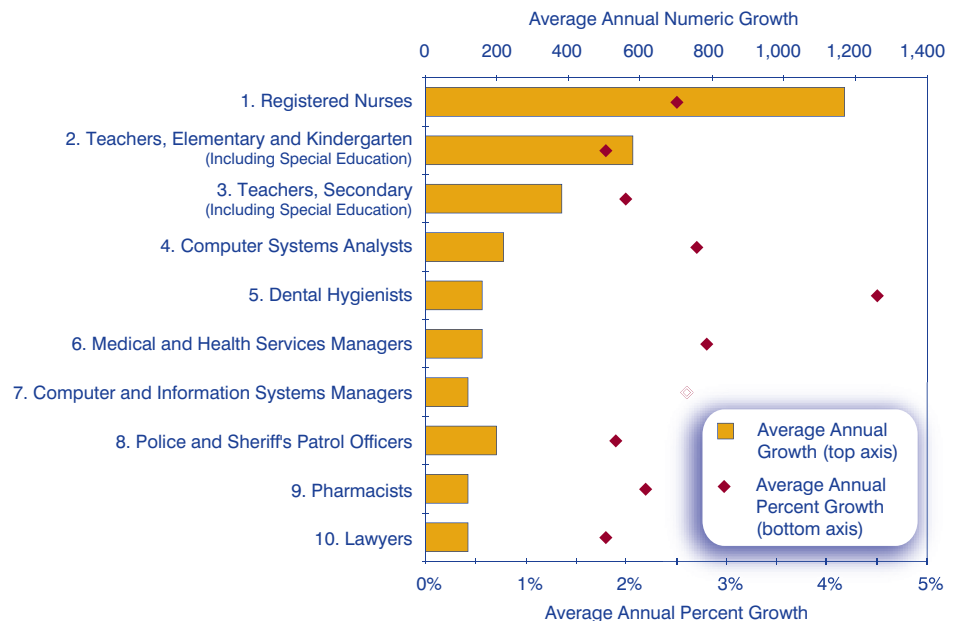
In America, we love winners and the lists that tell us who the winners are. We use lists to choose our movies, music, television shows, stock purchases and where to live. Other lists tell us who is the most beautiful, best-dressed, most popular or has the most money. Our fascination with lists carries over into the area of career planning and guidance. We want to know which occupations offer the most promise for a good job four to six years down the road. We want to know which are the hot jobs.

Frequently, that request results in a list of the fastest-growing occupations in terms of either percentages or straight numeric growth. But those types of lists really have limited value. The

“fastest-growing” lists are typically dominated by occupations with small employment, and the “greatest growth” lists are dominated by low-pay, short-hours occupations. For example, the most recent national “fastest growing” list by the Bureau of Labor Statistics (BLS) featured home health aides—a very low-paying job with little training required—as its number one occupation. On the BLS list of largest job growth, number one was retail salespersons—another low-paying, generally low-skill occupation. Some lists are also too short to give a sense of the breadth of occupational opportunities.

Indiana's Department of Workforce Development wanted to provide a genuinely useful list to assist Hoosiers

FIGURE 1: NUMERIC AND PERCENT GROWTH OF TOP TEN HOOSIER HOT 50 JOBS, 2002 TO 2012



Source: Indiana Department of Workforce Development

TABLE 1: HIGHEST PAYING JOBS ON THE HOOSIER HOT 50 JOBS LIST AND THE DEGREE REQUIRED TO OBTAIN THEM

Rank in the Hot 50	Occupation	Average Annual			Degree Required
		Growth	Percent Growth	Wage	
13	Sales Managers	100	1.9	\$84,331	Work Experience plus Bachelor's or Higher
10	Lawyers	120	1.8	\$81,128	First Professional
9	Pharmacists	120	2.2	\$78,859	First Professional
7	Computer and Information Systems Managers	120	2.6	\$76,057	Work Experience plus Bachelor's or Higher
26	Chemists	40	2.0	\$73,423	Bachelor's
16	Education Administrators, Elementary and Secondary School	80	2.1	\$73,205	Work Experience plus Bachelor's or Higher
12	Computer Software Engineers, Applications	110	2.6	\$67,696	Bachelor's
11	Computer Software Engineers, Systems Software	100	3.2	\$62,380	Bachelor's
6	Medical and Health Services Managers	160	2.8	\$62,244	Work Experience plus Bachelor's or Higher
15	Physician Assistants	30	4.7	\$61,380	Bachelor's

Source: Indiana Department of Workforce Development

in exploring careers and avoid some of the pitfalls discussed above. We included the three components that one might be most interested in while career planning:

- Fast growth
- A large number of opportunities
- Good pay

We also included the levels of education and training that are common in these jobs.

The result is the first edition of *Hoosier Hot 50 Jobs*, which can now be seen in employment offices and career centers—as well at the *Hoosiers by the Numbers* website (www.hoosierdata.in.gov). The list is to be updated every six months.

How Hot Is Hot?

To measure the hotness of a job, three key elements were used: projected job growth (the numeric increase), rate of growth (the percentage increase), and high wages. All selected jobs were required to:

- Be in the top 200 in terms of BOTH total growth and rate of growth in Indiana's 2002–2012 Occupational Projections
- Have wages greater than the statewide median for all occupations according to the latest available Occupational

Employment Statistics Survey (OES) for Indiana.

Each of these elements was indexed to give 50 percent weight to the job growth factors and 50 percent to the wage factor in determining the hottest of the hot jobs.

Figure 1 shows the top 10 jobs on the *Hoosier Hot 50 Jobs* list and their projected growth from 2002 to 2012.

Can I Get a Hot Job Right Out of High School?

The list demonstrates the importance for Hoosiers continuing their education. Table 1 shows the ten highest paying jobs on the *Hoosier Hot 50 Jobs* list and the corresponding degrees required to obtain those jobs. Of the 50 jobs on the list, 32 require a minimum of a bachelor's degree. Another 13 require at least some post-secondary education.

Do you want to be a bill collector? That's the only occupation on the list requiring only short-term, on-the-job training—and it is the lowest-paying on the list.

Highlights of the Hot List:

- Medical fields in general are very hot, containing 21 of the 50 hot jobs (see Table 2).

- Ten hot jobs are found in the computer, science and engineering fields.
- Five are in business.
- Social services/government and education each have four.
- The other six are in legal and construction/production/repair.

Enhancements for Version 1.2

We are currently exploring other hotness indicators that we can incorporate into our index, including use of short-term (two-year) occupational projections for Indiana (due out this summer), the possibility of some weighting based on a sampled frequency with which the occupation is listed on job-matching websites or use of requisite knowledge, skills and abilities—as opposed to formal training requirements. Hot jobs by region for Indiana's economic growth regions are also under development and should be available this summer. Check our website (www.hoosierdata.in.gov) later this summer for the regional hot jobs and future versions of the *Hoosier Hot 50 Jobs* listing.

—Jon Wright, Research and Analysis Department, Indiana Department of Workforce Development

TABLE 2: HOOSIER HOT 50 JOBS BY SECTOR

	Rank	Occupation	Average Annual		Degree and/or Training Required	Top Three Skills
			Growth	Wage		
Medical (21)	1	Registered Nurses	1,170	\$46,242	Associate Degree	Active Listening, Reading Comprehension, Critical Thinking
	5	Dental Hygienists	160	\$52,410	Associate Degree	Active Listening, Speaking, Reading Comprehension
	6	Medical and Health Services Managers	160	\$62,244	Work Experience plus Bachelor's or Higher Degree	Active Listening, Reading Comprehension, Critical Thinking
	9	Pharmacists	120	\$78,859	First Professional Degree	Active Listening, Speaking, Reading Comprehension
	15	Physician Assistants	30	\$61,380	Bachelor's Degree	Active Listening, Active Learning, Speaking
	18	Respiratory Therapists	90	\$40,699	Associate Degree	Active Listening, Instructing, Reading Comprehension
	21	Physical Therapists	70	\$60,326	Master's Degree	Active Listening, Instructing, Time Management
	22	Surgical Technologists	70	\$34,546	Postsecondary Vocational Training	Active Listening, Active Learning, Critical Thinking
	25	Occupational Therapists	50	\$52,255	Bachelor's Degree	Active Listening, Reading Comprehension, Service Orientation
	26	Chemists	40	\$73,423	Bachelor's Degree	Science, Complex Problem Solving, Reading Comprehension
	28	Radiologic Technologists and Technicians	90	\$39,747	Associate Degree	Active Listening, Speaking, Reading Comprehension
	35	Physical Therapist Assistants	40	\$38,536	Associate Degree	Active Listening, Reading Comprehension, Time Management
	36	Medical and Clinical Laboratory Technologists	70	\$42,233	Bachelor's Degree	Quality Control Analysis, Equipment Maintenance, Reading Comprehension
	38	Speech-Language Pathologists	50	\$50,348	Master's Degree	Instructing, Speaking, Active Listening
	41	Clinical, Counseling and School Psychologists	40	\$53,952	Master's Degree	Active Listening, Reading Comprehension, Writing
	42	Cardiovascular Technologists and Technicians	30	\$33,632	Associate Degree	Active Listening, Reading Comprehension, Instructing
	44	Substance Abuse and Behavioral Disorder Counselors	40	\$31,966	Master's Degree	Active Listening, Social Perceptiveness, Service Orientation
	45	Mental Health and Substance Abuse Social Workers	40	\$32,053	Master's Degree	Active Listening, Social Perceptiveness, Critical Thinking
	46	Medical and Public Health Social Workers	40	\$36,836	Bachelor's Degree	Active Listening, Writing, Reading Comprehension
	47	Medical and Clinical Laboratory Technicians	60	\$29,371	Associate Degree	Reading Comprehension, Active Listening, Speaking
	48	Biological Technicians	40	\$34,989	Associate Degree	Science, Reading Comprehension, Instructing
Computer, Science and Engineering (10)	4	Computer Systems Analysts	220	\$59,296	Bachelor's Degree	Active Learning, Reading Comprehension, Complex Problem Solving
	7	Computer and Information Systems Managers	120	\$76,057	Work Experience plus Bachelor's or Higher Degree	Reading Comprehension, Critical Thinking, Active Listening
	11	Computer Software Engineers, Systems Software	100	\$62,380	Bachelor's Degree	Complex Problem Solving, Technology Design, Troubleshooting
	12	Computer Software Engineers, Applications	110	\$67,696	Bachelor's Degree	Programming , Critical Thinking, Complex Problem Solving
	14	Network Systems and Data Communications Analysts	70	\$54,357	Bachelor's Degree	Equipment Selection, Troubleshooting , Complex Problem Solving
	17	Network and Computer Systems Administrators	100	\$50,989	Bachelor's Degree	Reading Comprehension, Troubleshooting , Active Listening
	19	Computer Support Specialists	140	\$36,676	Associate Degree	Troubleshooting , Reading Comprehension, Critical Thinking
	30	Environmental Engineers	30	\$55,277	Bachelor's Degree	Reading Comprehension, Active Listening, Critical Thinking
	31	Database Administrators	50	\$50,023	Bachelor's Degree	Active Learning, Troubleshooting , Critical Thinking
	50	Surveying and Mapping Technicians	30	\$30,170	Postsecondary Vocational Training	Mathematics, Active Listening, Active Learning
Social Services/ Government (4)	8	Police and Sheriff's Patrol Officers	200	\$37,690	Long-Term On-the-Job-Training	Judgment and Decision Making, Active Listening, Critical Thinking
	32	Employment, Recruitment and Placement Specialists	70	\$48,217	Bachelor's Degree	Reading Comprehension, Service Orientation , Active Listening
	33	Child, Family and School Social Workers	100	\$31,040	Bachelor's Degree	Speaking, Active Listening, Monitoring
	43	Social and Community Service Managers	50	\$40,127	Bachelor's Degree	Active Listening, Social Perceptiveness, Speaking
Education (4)	2	Teachers, Elementary and Kindergarten (Including Special Education)	580	\$42,845	Bachelor's Degree	Instructing , Learning Strategies, Monitoring
	3	Teachers, Secondary (Including Special Education)	380	\$43,717	Bachelor's Degree	Instructing , Learning Strategies, Monitoring
	16	Education Administrators, Elementary and Secondary School	80	\$73,205	Work Experience plus Bachelor's or Higher Degree	Active Listening, Reading Comprehension, Monitoring
	29	Education Administrators, Postsecondary	40	\$57,887	Work Experience plus Bachelor's or Higher Degree	Active Listening, Reading Comprehension, Critical Thinking
Business (5)	13	Sales Managers	100	\$84,331	Work Experience plus Bachelor's or Higher Degree	Active Listening, Speaking, Mathematics
	20	Bill and Account Collectors	130	\$28,040	Short-Term On-the-Job-Training	Active Listening, Speaking, Reading Comprehension
	23	Personal Financial Advisors	50	\$55,108	Bachelor's Degree	Active Listening, Speaking, Mathematics
	37	Public Relations Specialists	70	\$37,964	Bachelor's Degree	Writing, Critical Thinking, Reading Comprehension
	39	Training and Development Specialists	70	\$41,758	Bachelor's Degree	Active Listening, Speaking, Time Management
Legal/Construction/ Production/Repair (6)	10	Lawyers	120	\$81,128	First Professional Degree	Reading Comprehension, Judgment and Decision Making, Writing
	24	Paralegals and Legal Assistants	80	\$36,050	Associate Degree	Speaking, Time Management, Active Listening
	27	Heating, Air Conditioning and Refrigeration Mechanics and Installers	100	\$37,699	Long-Term On-the-Job-Training and/or Apprenticeship	Troubleshooting, Repairing, Active Listening
	34	Legal Secretaries	100	\$28,742	Postsecondary Vocational Training	Reading Comprehension, Active Listening, Time Management
	40	Cement Masons and Concrete Finishers	90	\$34,086	Long-Term On-the-Job-Training and/or Apprenticeship	Coordination, Mathematics, Active Listening
	49	Chemical Equipment Operators and Tenders	60	\$30,798	Moderate-Term On-the-Job-Training	Operation and Control, Operation Monitoring, Quality Control Analysis

Source: Indiana Department of Workforce Development

Indiana's Economy Still Growing, but More Slowly

Many observers were encouraged by recent reports that the U.S. economy grew at an annual rate of 3.5 percent in 2005, though the national growth rate was down somewhat from the prior year's 4.2 percent. The growth rate of Indiana's economy, however, while still positive, slowed to 46th in the nation, according to new figures released by the Bureau of Economic Analysis (BEA).

These conclusions are based on preliminary estimates of gross state product (GSP), the most comprehensive measure of a state's overall economic activity. The BEA produces estimates each year for total state GSP, followed some months later by estimated breakouts of GSP by industry.

Indiana's real GSP in 2005 was estimated at \$214.1 billion, up 1.1 percent from 2004 (expressed in 2000 dollars to account for inflation). This modest growth allowed Maryland (which grew by 3.7 percent) to surpass Indiana to claim the 15th largest economy in the nation, with the Hoosier state dropping to 16th.

TABLE 1: TOTAL REAL GSP (MILLIONS OF 2000 DOLLARS), MIDWESTERN STATES, 2000 TO 2005

Geography	2000	2001	2002	2003	2004	2005
United States	9,749,103	9,836,576	9,981,850	10,237,201	10,662,196	11,035,627
Illinois	464,194	464,910	466,150	478,391	489,042	499,456
Ohio	372,006	365,735	373,457	379,439	390,882	394,927
Michigan	337,235	326,869	336,862	344,942	342,371	342,656
Indiana	194,419	190,327	196,828	204,837	211,745	214,093
Wisconsin	175,737	177,434	180,330	184,777	190,597	194,489
Kentucky	111,900	112,166	115,492	118,246	121,738	124,534

Source: IBRC, using Bureau of Economic Analysis data

Overall, the Great Lakes region was the slowest-growing part of the nation in 2005, averaging only 1.3 percent GSP growth over 2004. **Table 1** shows real GSP for Indiana and nearby states as well as the United States from 2000 through 2005, and **Figure 1** indicates the percentage by which these figures changed each year. Several Midwestern manufacturing states, including Indiana, were seriously rocked by the recession and experienced negative economic growth in 2001. All of these states'

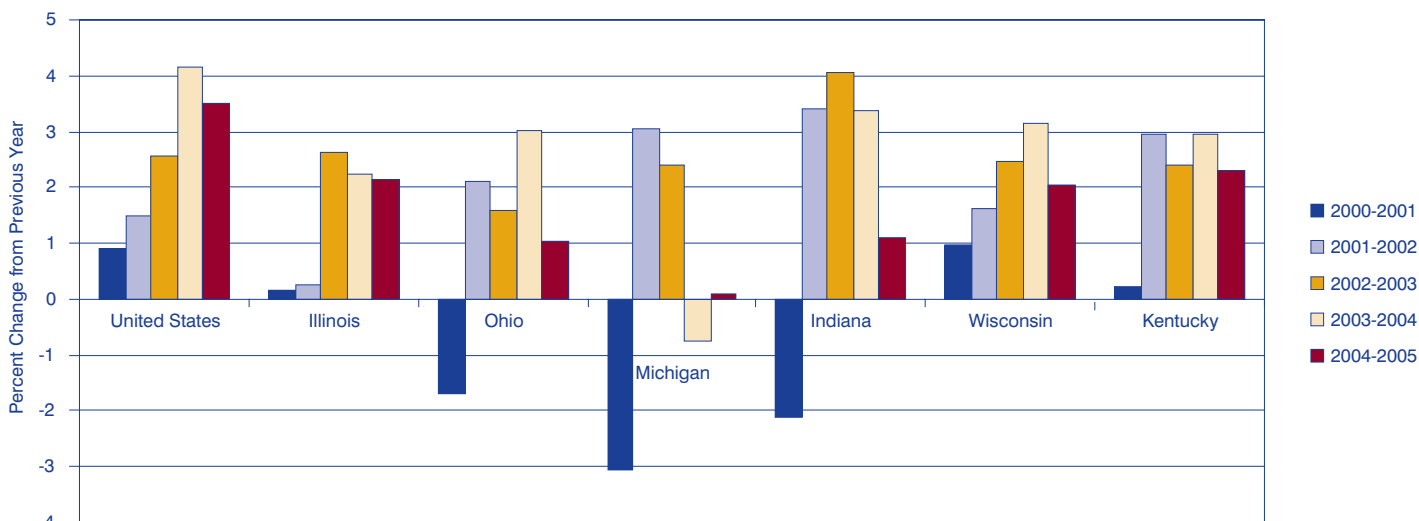
economies have grown somewhat in subsequent years (except for Michigan in 2004), even though the growth rates varied significantly across the states.

Indiana's growth rate led the region in 2002 through 2004, but its growth fell behind Kentucky, Illinois and Wisconsin in 2005.

Figure 2 puts the cumulative effects of these changes into perspective, depicting the cumulative change in GSP since 2001 for Indiana relative to nearby states and the United States. The values in this chart are indexed to a base of

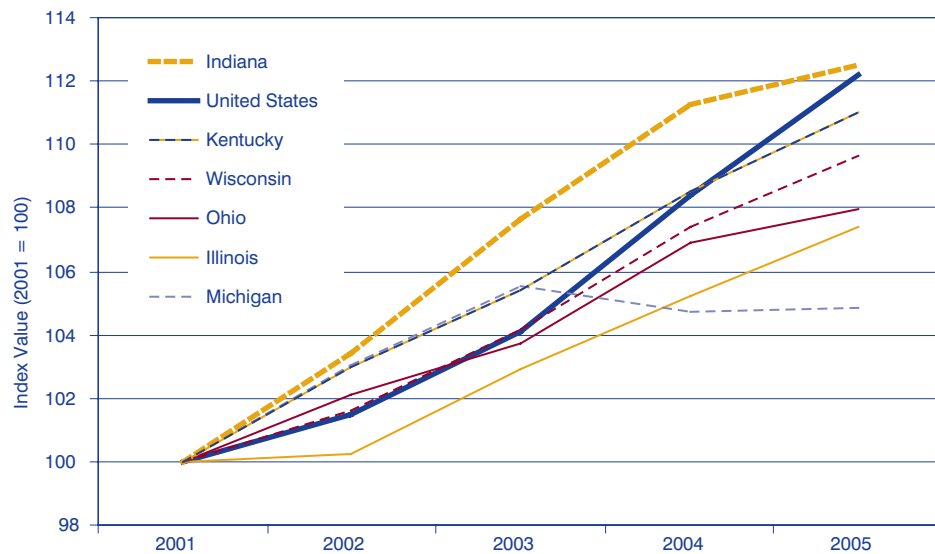
“Indiana's real GSP in 2005 was estimated at \$214.1 billion, up 1.1 percent from 2004 (expressed in 2000 dollars to account for inflation).”

FIGURE 1: ANNUAL CHANGE IN REAL GROSS STATE PRODUCT, 2001 TO 2005



Source: IBRC, using Bureau of Economic Analysis data

FIGURE 2: RELATIVE CHANGE IN TOTAL GSP, 2001 TO 2005



Source: IBRC, using Bureau of Economic Analysis data

100 representing each state's starting value in 2001. Indiana leads the pack with a 2005 index of 112.5, which means that its economy has grown by 12.5 percent since 2001, slightly ahead of the national economy's growth during the same period.

Some Hoosier observers may be concerned with the slowing pace of Indiana's economic growth. Unfortunately, it's difficult at present to diagnose the contributing factors because industry-level GSP data for 2005 are not yet available from the BEA. A breakout of contributions to Indiana's economy by industry for 2004 is shown in **Table 2**, which shows dollar value of output from each major industry group and the corresponding percentage of total GSP for both Indiana and the nation. The table also shows the location quotient (LQ) for each industry based on the GSP data. These location quotients indicate the contribution of each industry to the state's economy expressed relative to the national average. Thus, for example, the LQ of 2.22 for manufacturing indicates that the manufacturing sector

accounts for 2.22 times as high a percentage of Indiana's economy as the sector's percentage of the U.S. economy.

Manufacturing is by far the largest contributor to Indiana's economy,

accounting for more than 30 percent of the state total. It may be that stress in this sector, which continues to experience substantial workforce shrinkage nationally, increased its impact on Indiana in 2005. However, the data to address this issue will not be available for several more months. In the interim, GSP figures for prior years lean in this direction, as the growth rate of Indiana manufacturing output shrank from 12.1 percent in 2002 to 6.4 percent in 2003 and 4.6 percent in 2004. Thus, the sector appears to be contributing less over time to the state's overall economic growth. When new 2005 data are released showing industry details, we will follow up on this issue.

—Jerry Conover, Director, Indiana Business Research Center, Kelley School of Business, Indiana University

TABLE 2: CONTRIBUTIONS TO GSP BY INDUSTRY IN INDIANA AND THE UNITED STATES, 2004

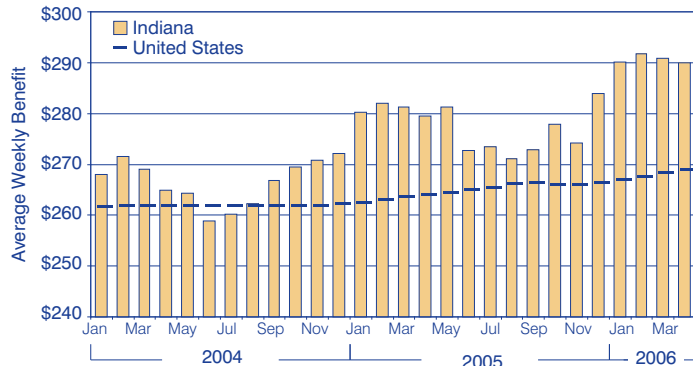
Industry	LQ	Real GSP (millions of 2000 dollars)			
		Indiana		United States	
		Numeric	Percent	Numeric	Percent
Manufacturing	2.22	\$65,365	30.8	\$1,478,108	13.8
Arts, Entertainment and Recreation	1.42	\$2,738	1.3	\$97,321	0.9
Transportation and Warehousing (Excluding Postal Service)	1.09	\$7,005	3.3	\$323,761	3.0
Utilities	1.08	\$4,389	2.1	\$204,535	1.9
Health Care and Social Assistance	1.02	\$13,950	6.6	\$691,215	6.5
Other Services (Except Government)	0.97	\$4,470	2.1	\$231,406	2.2
Agriculture, Forestry, Fishing and Hunting	0.94	\$1,981	0.9	\$105,997	1.0
Retail Trade	0.94	\$14,942	7.0	\$797,696	7.5
Construction	0.93	\$8,015	3.8	\$432,884	4.1
Wholesale Trade	0.88	\$12,023	5.7	\$683,751	6.4
Administrative and Waste Services	0.84	\$5,107	2.4	\$307,526	2.9
Government	0.80	\$18,974	8.9	\$1,186,715	11.1
Accommodation and Food Services	0.79	\$4,392	2.1	\$277,919	2.6
Educational Services	0.78	\$1,279	0.6	\$82,736	0.8
Real Estate, Rental and Leasing	0.74	\$19,634	9.2	\$1,328,027	12.4
Finance and Insurance	0.70	\$11,730	5.5	\$845,256	7.9
Management of Companies and Enterprises	0.60	\$2,429	1.1	\$203,439	1.9
Professional and Technical Services	0.53	\$7,781	3.7	\$732,728	6.9
Information	0.49	\$5,509	2.6	\$563,817	5.3
Mining	0.32	\$680	0.3	\$108,415	1.0

*For additional discussion of the issues involved in analyzing real economic growth based on chain-type quantity indexes or chained dollars measures, refer to the box, "Using Chained Dollar Estimates for Computing Contributions to Economic Growth: A Cautionary Note," in: Lum, Sherlene K. S. and Brian C. Moyer, "Gross Product by Industry, 1995-97," Survey of Current Business 78 (November 1998): 20-40. This explanation is available at www.bea.gov/bea/an/1198gpo/box4.htm.

Source: IBRC, using Bureau of Economic Analysis data

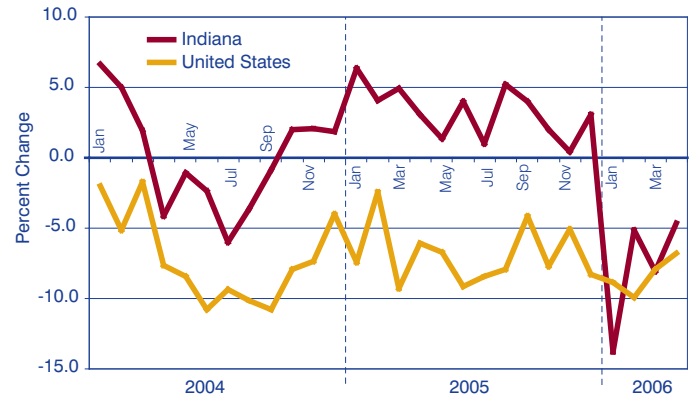
Monthly Metrics: Indiana's Economic Indicators

AVERAGE WEEKLY BENEFITS PAID FOR UNEMPLOYMENT INSURANCE CLAIMS, JANUARY 2004 TO APRIL 2006



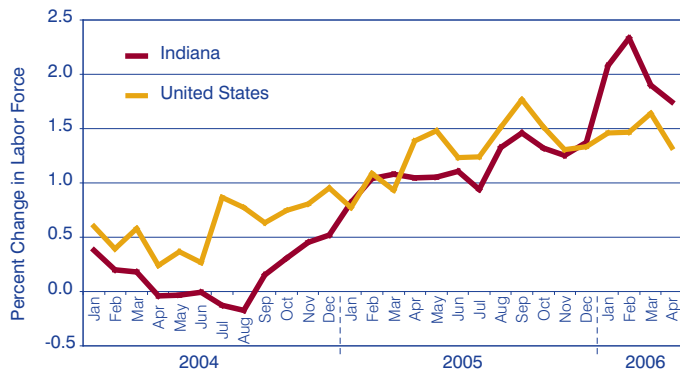
Source: U.S. Department of Labor

PERCENT CHANGE IN UNEMPLOYMENT FROM THE PREVIOUS YEAR*



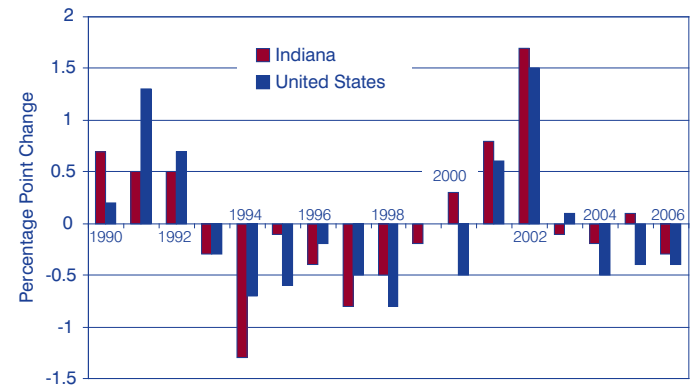
*seasonally adjusted
Source: IBRC, using Bureau of Labor Statistics data

PERCENT CHANGE IN LABOR FORCE FROM PREVIOUS YEAR*



*seasonally adjusted
Source: IBRC, using Bureau of Labor Statistics data

CHANGE IN UNEMPLOYMENT RATE FROM APRIL OF PREVIOUS YEAR*



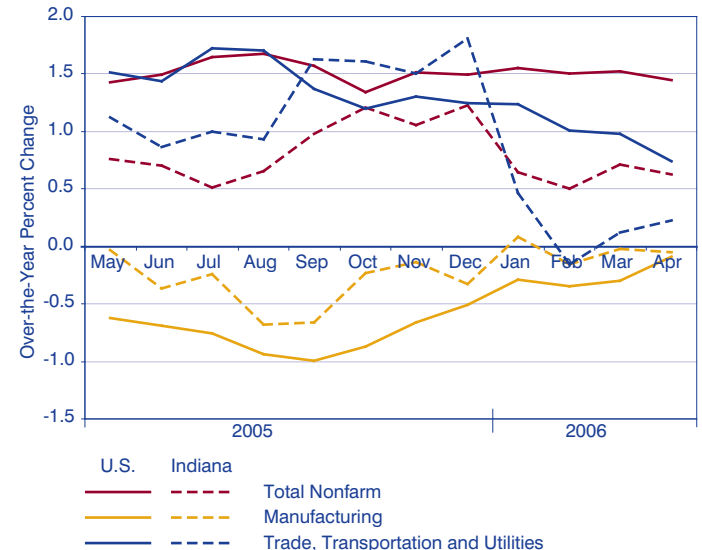
*seasonally adjusted
Source: IBRC, using Bureau of Labor Statistics data

CHANGE IN EMPLOYMENT BY INDUSTRY SUPER-SECTOR, 2005 TO 2006*

Industry	Indiana		United States
	Change in Jobs	Percent Change	Percent Change
Total Nonfarm	18,500	0.6	1.4
Natural Resources and Mining	200	2.9	8.2
Education and Health Services	7,700	2.1	2.4
Leisure and Hospitality	4,500	1.6	1.7
Construction	2,200	1.5	3.7
Financial Activities	1,200	0.9	2.6
Professional and Business Services	1,800	0.7	2.6
Trade, Transportation and Utilities	1,300	0.2	0.7
Government	400	0.1	0.6
Manufacturing	-300	-0.1	-0.1
Information	-100	-0.2	-0.1
Other Services	-400	-0.4	0.1

*April of each year, seasonally adjusted
Source: IBRC, using Bureau of Labor Statistics data

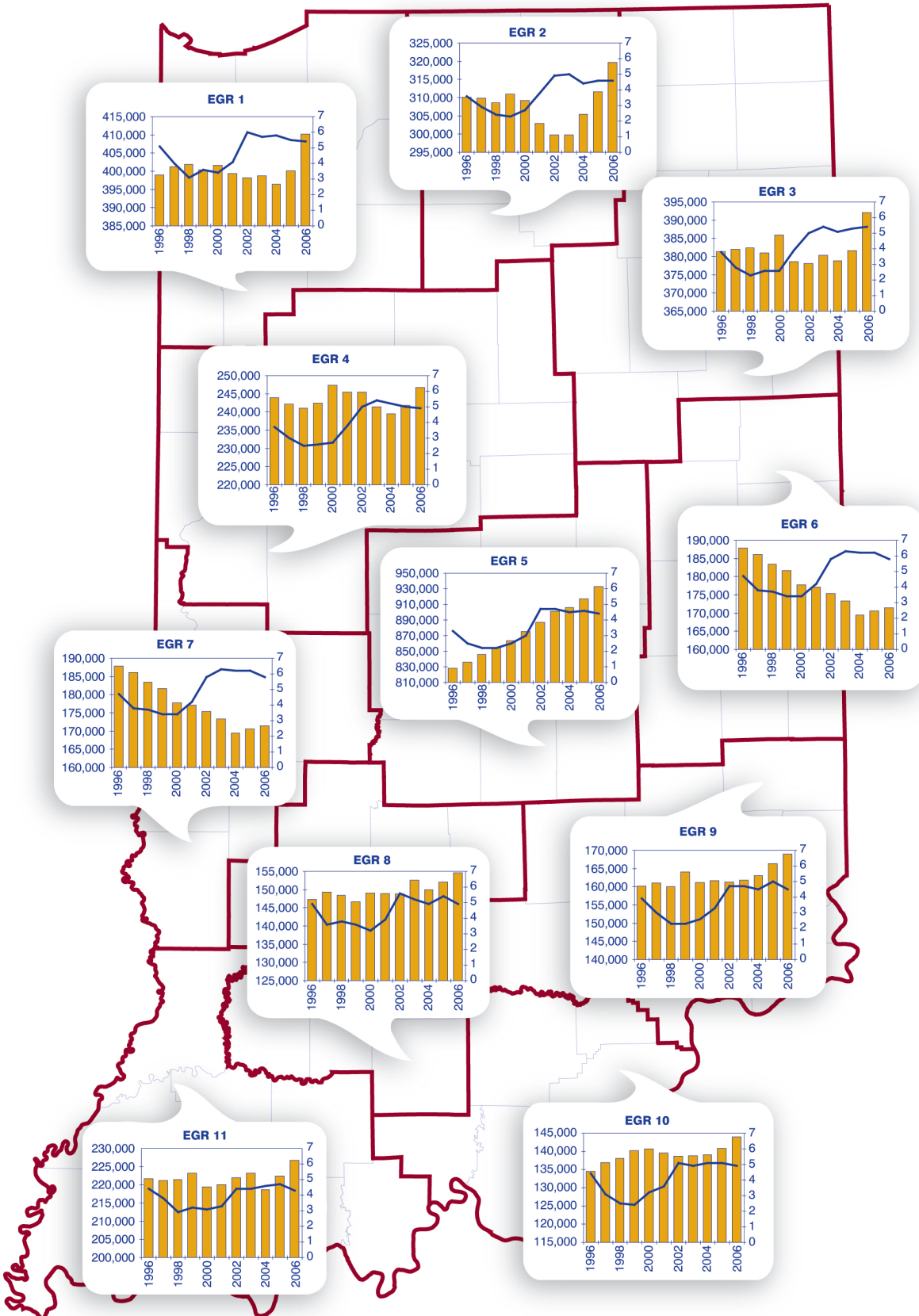
OVER-THE-YEAR PERCENT CHANGE IN EMPLOYMENT BY SUPER-SECTOR*



*seasonally adjusted
Source: IBRC, using Bureau of Labor Statistics and Indiana Department of Workforce Development data

Regional Labor Force and Unemployment Rates

May of Each Year (not seasonally adjusted) ■ Labor Force (left axis) — Unemployment Rate (right axis)



Growth in Indiana's Health Care Sector

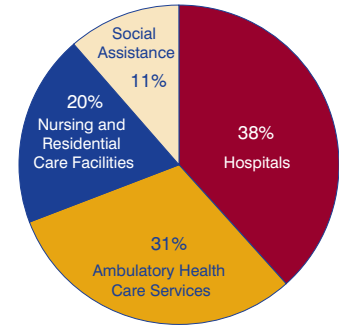
Many of the state's hot jobs are in the medical field, making health care and social assistance one of Indiana's fastest growing sectors. Between the third quarters of 2001 and 2005, Indiana added nearly 26,700 jobs in health care and social assistance. Tying with retail trade at 12 percent, it is the second-largest sector in the

state (manufacturing ranks first at 20 percent). This article will utilize Covered Employment and Wages data to explore the health care and social assistance field, which employs over 348,000 Hoosiers statewide.

Overview

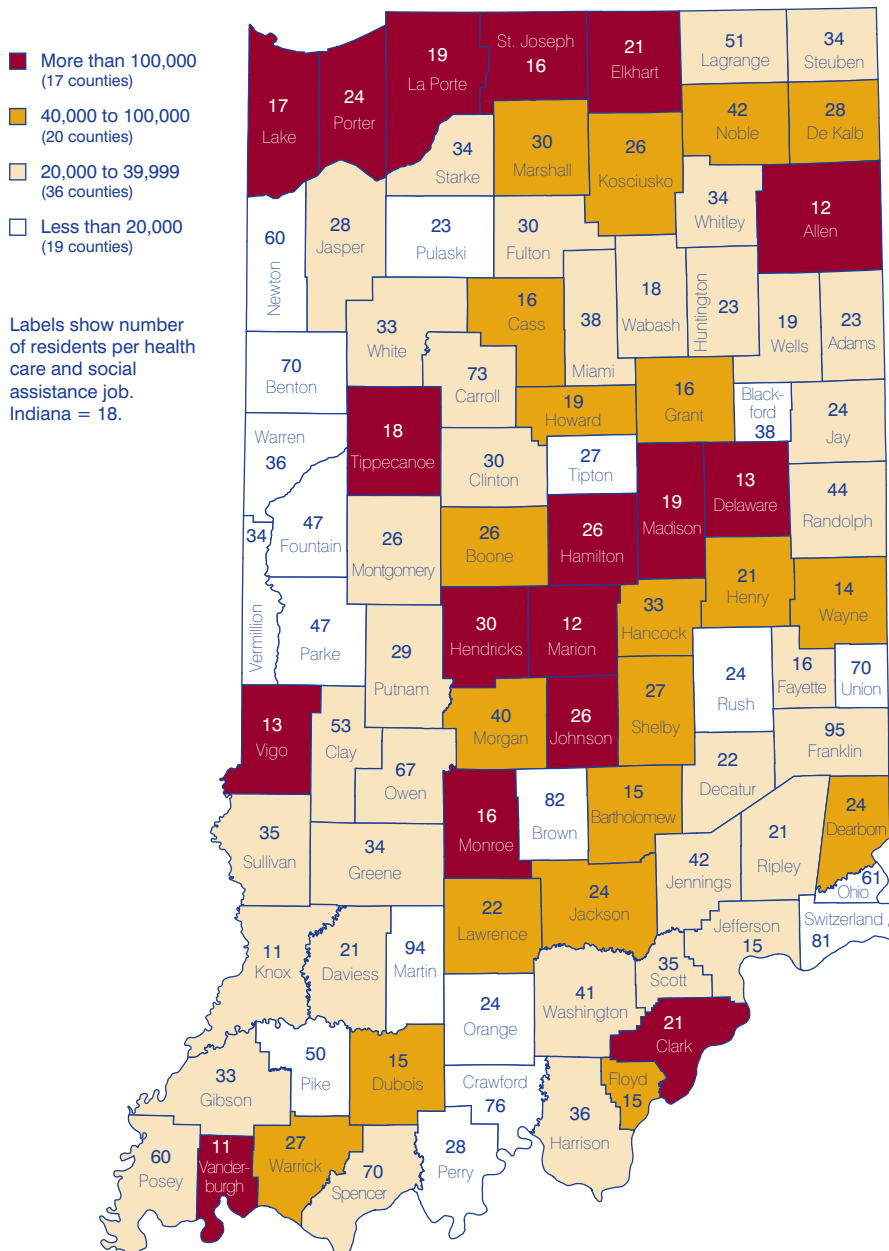
Figure 1 shows the four subsectors comprising the health care and social

FIGURE 1: SUBSECTOR EMPLOYMENT AS A PERCENT OF ENTIRE SECTOR, 2005:3



Source: IBRC, using Bureau of Labor Statistics data

FIGURE 2: POPULATION BY COUNTY AND RESIDENTS PER HEALTH CARE JOB, 2005:3



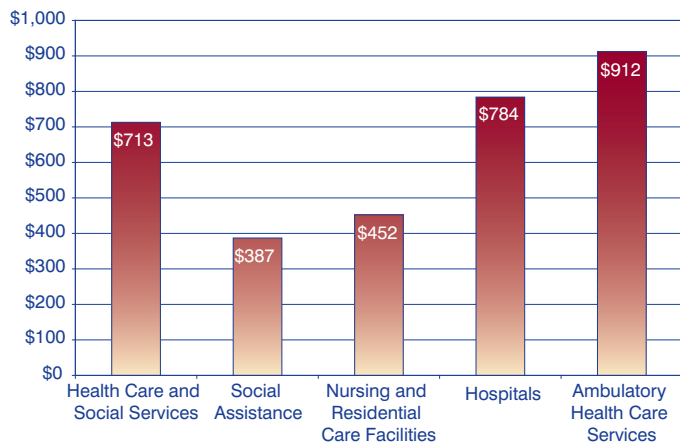
Source: IBRC, using Bureau of Labor Statistics data

assistance sector. Though there are just 179 hospitals statewide, they employ 133,600 people. The ambulatory health care services subsector employs roughly 107,200 people in about 8,100 offices statewide (this includes physicians, dentists and other health practitioners' offices, as well as outpatient care centers, medical/diagnostic laboratories, and home health care services). Almost 68,000 Hoosiers are employed within Indiana's 1,082 nursing and residential care facilities. In addition, roughly 39,400 people work in the state's 2,235 social assistance establishments (which include individual and family services; food, housing and emergency services; vocational rehabilitation; and child daycare).

Jobs

At the county level, tiny Ohio County has less than 100 jobs in health care and social assistance, whereas Marion County has over 71,500. Since the size of the sector generally tends to coincide with the size of the population, how many people are there for each health care and social assistance job? Statewide, there are 18 residents for each job in the sector (see Figure 2). In Vanderburgh and Knox counties, that number drops to 11 residents. At the other end of the spectrum, both Martin and Franklin counties have over

FIGURE 3: HEALTH CARE SUB-SECTOR WAGES, 2005:3



Source: IBRC, using Bureau of Labor Statistics data

90 people per health care and social assistance job (these are two of the 16 counties in the state without a hospital). The median number of residents per sector job equals 27 (meaning half of the counties have a higher number and half fall below it).

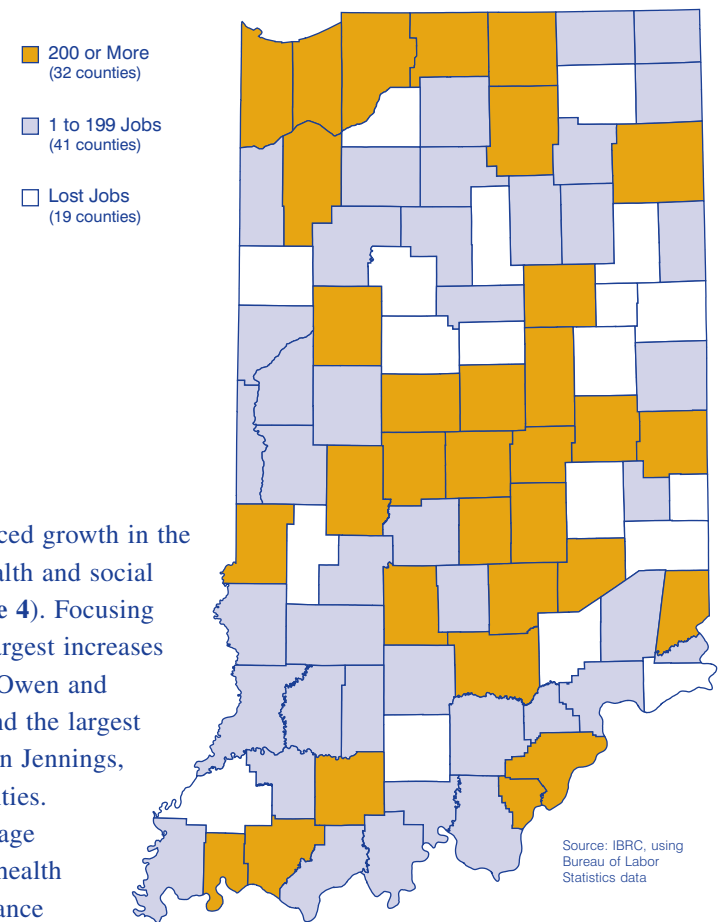
Wages

Overall, average weekly wages for the health care and social services sector equals \$713. This exceeds the state average across all industries, which is \$689 per week, and ranks about in the middle among all 20 NAICS sectors. Pike County has the lowest average weekly wage (\$379), while the average exceeds \$800 in both Marion County (\$862) and Delaware County (\$844). Statewide, wages between the subsectors run the gamut, from social assistance at \$387 to ambulatory health care services at \$912 per week (see **Figure 3**).

Recent Changes

Since the third quarter of 2001, Indiana added 26,688 health care and social assistance jobs—a gain of 8.3 percent. This was the largest growth on a numeric basis and the second largest from a percent basis (trailing the administrative, support and waste management sector, whose growth exceeded 16 percent). Of the state’s 92

FIGURE 4: HEALTH CARE JOB GROWTH, 2001:3 TO 2005:3



Source: IBRC, using Bureau of Labor Statistics data

counties, 73 experienced growth in the number of jobs in health and social assistance (see **Figure 4**). Focusing on percentages, the largest increases occurred in Newton, Owen and Hamilton counties, and the largest declines were found in Jennings, Union and Rush counties.

Statewide, the average weekly wage for the health care and social assistance sector increased by \$111 between 2001:3 and 2005:3. This was a gain of 18.4 percent, which tied with manufacturing as the fourth largest increase across all sectors. At the county level, the fastest wage growth was found in Owen County, with a gain of 91.2 percent (or \$290 per week). Washington and Delaware counties rounded out the top three with gains exceeding 40 percent. Meanwhile, three counties—Brown, Hendricks and Knox—encountered wage declines of -11.2 percent, -2.2 percent and -0.9 percent, respectively.

At the subsector level, Indiana’s nursing and residential care subsector grew the slowest at 10.5 percent (or \$43 per week), while average wages in the hospital subsector grew the most at 25 percent (or \$157 per week). Much of the subsector data for employment and earnings is suppressed at the county level, but a summary of what is available is shown in **Table 1**.

—Rachel Justis, Managing Editor, Indiana Business Research Center, Kelley School of Business, Indiana University

TABLE 1: COUNTIES WITH CHANGE IN HEALTH CARE AND SOCIAL ASSISTANCE SUBSECTORS

	Sector		Ambulatory Health Care Services		Hospitals*		Nursing and Residential Care Facilities		Social Assistance	
	Jobs	Wages	Jobs	Wages	Jobs	Wages	Jobs	Wages	Jobs	Wages
Growth	73	89	60	68	11	15	53	58	19	20
Decline	19	3	18	10	4	0	19	14	6	5
Nondisclosable	0	0	14	14	61	61	20	20	67	67

*Sixteen counties do not have hospitals
Source: IBRC, using Bureau of Labor Statistics data

Regional Perspective: Economic Growth Region 7

Economic Growth Region (EGR) 7, located in the west-central portion of the state, shares a border with Indiana's western neighbor Illinois. It has fewer people calling it home than any of the 11 regions in Indiana with a 2005 population of about 222,400 people (equivalent to 3.5 percent of the state's population). The region consists of six counties: Clay, Parke, Putnam, Sullivan, Vermillion and Vigo. Vigo County makes up more than 46 percent of the region's population (see **Figure 1**). However, Vigo County's share of the population has been declining since 2000 and it had 3,100 fewer people in 2005 than it did at the turn of the century (see **Figure 2**). The other five counties in the region have

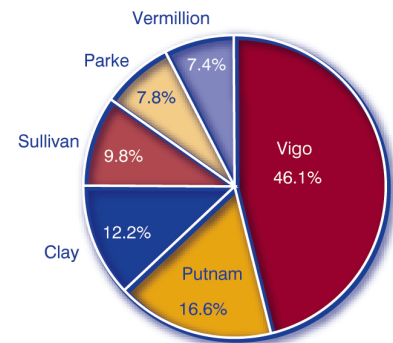
seen at least some population growth over that time span, though it wasn't enough to make up for Vigo County's losses, with the region overall seeing losses of about 1,800 people.

Where is everyone going? Over that same five-year span, the region added about 850 people naturally (more births than deaths), meaning that the loss in population cannot be attributed to a natural decrease. Net migration was -2,359 since 2000, meaning more people moved out of the region than into it.

Jobs

In the third quarter of 2005, there were 4,361 establishments in EGR 7 supplying 84,322 jobs. The industry

FIGURE 1: POPULATION DISTRIBUTION, EGR 7

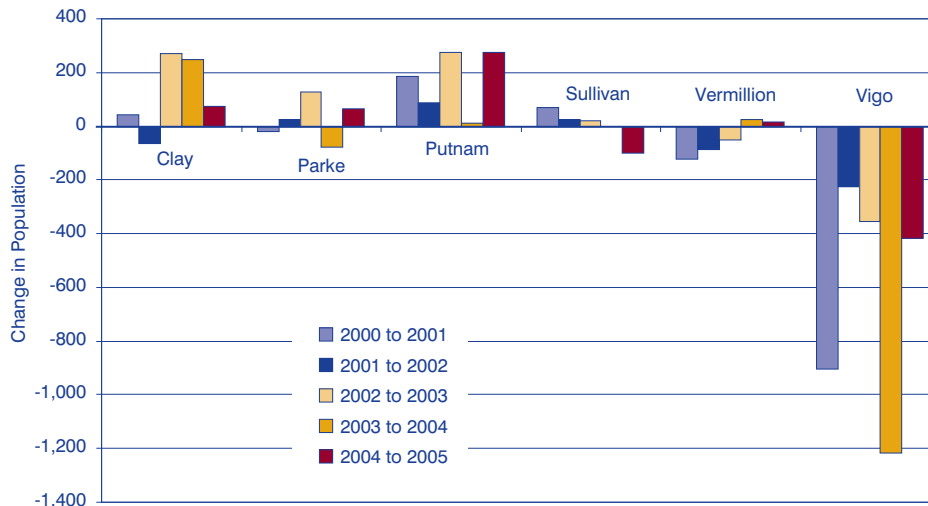


Source: IBRC, using U.S. Census Bureau data

providing the most jobs at both the state and regional level was—to no surprise—manufacturing. However, EGR 7 contributed only 18.1 percent of its workers to the manufacturing industry compared to 19.9 percent at the state level. The change in manufacturing jobs from 2001:3 to 2005:3 moved in opposite directions at the state and regional levels. The number of jobs supplied by the manufacturing industry at the state level during that time decreased by 6.4 percent; Region 7, on the other hand, added 292 jobs in the manufacturing industry over the four-year period for a 2 percent increase.

One of the largest manufacturers in the region is Columbia House, which manufactures music and movies, employs between 1,000 and 5,000 workers, and brings in between \$500 million to \$1 billion in sales each year. **Table 1** shows the nine

FIGURE 2: CHANGE IN POPULATION IN EGR 7 COUNTIES, 2000 TO 2005



Source: IBRC, using U.S. Census Bureau data

TABLE 1: LARGEST MANUFACTURING EMPLOYERS IN EGR 7

Company	City	County	Employees	Sales	Products
Bemis Polyethylene Packaging	Terre Haute	Vigo	1,000 to 4,999	\$100 to \$500 Million	Plastics, Foil and Coated Paper Bags
Columbia House	Terre Haute	Vigo	1,000 to 4,999	\$500 Million to \$1 Billion	Musical Instrument and Supplies Stores
Digital Audio Disc	Terre Haute	Vigo	1,000 to 4,999	\$100 to \$500 Million	Integrated Record Production and Distribution
Eli Lilly	Clinton	Vermillion	500 to 999	Over \$1 Billion	Druggists' Goods Merchant Wholesale
Mason Hanger	Newport	Vermillion	500 to 999	\$50 to \$100 Million	Physical, Engineering and Biological Research
Heartland Automotive	Greencastle	Putnam	500 to 999	\$20 to \$50 Million	All Other Plastics Products
Lear	Greencastle	Putnam	500 to 999	\$100 to \$500 Million	All Other Motor Vehicle Parts
AET	Terre Haute	Vigo	500 to 999	\$100 to \$500 Million	Nonpackaging Plastics Film and Sheet
Federal Correctional Institution	Terre Haute	Vigo	500 to 999	\$50 to \$100 Million	Correctional Facility

Source: InfoUSA

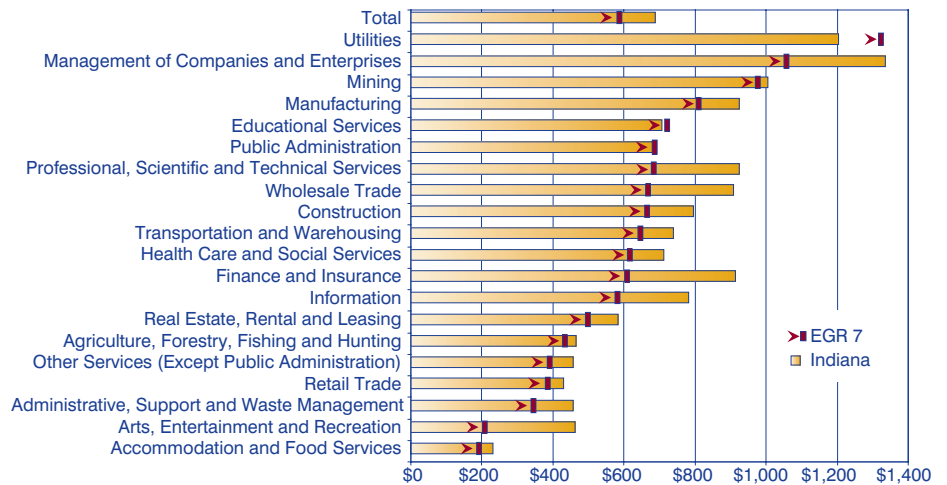
largest manufacturing employers in the region in terms of number of people employed, five of which are located in Vigo County. Eli Lilly is the largest manufacturing contributor to the region's economy outside of Vigo County, bringing in more than \$1 billion in sales each year; it doesn't, however, employ as many workers as Columbia House.

From 2001:3 to 2005:3, the mining industry in EGR 7 saw the most dramatic percent change in jobs, dropping 83.2 percent. In 2001, the industry made up 0.3 percent of all jobs in the region; this figure fell to 0.1 percent in 2005. Numerically, the mining industry in Region 7 lost 243 jobs, making up 57 percent of the mining industry losses for the entire state. The retail trade industry saw the largest numeric decline in jobs and was the only industry in EGR 7 to lose more jobs than the mining industry (see **Table 2**).

Wages

Economic Growth Region 7 has increased average weekly wages across

FIGURE 3: AVERAGE WEEKLY WAGES IN EGR 7 AND INDIANA, 2005:3



Source: IBRC, using Bureau of Labor Statistics data

all industry sectors by \$92; at the state level, average weekly wages increased by \$95, making it appear as though EGR 7 is barely trailing the state. However, a closer look reveals that EGR 7 still pays, on average, \$94 less per week than the state (compared to a \$91 difference in the same direction in 2001).

The biggest difference between state and regional average weekly wages was in the finance and insurance industry, with Indiana paying about \$298 more

per week than the region (see **Figure 3**). This is worse than in 2001, when the state was averaging \$281 more than Region 7. There were three industries that the region paid more than the state: utilities, education services and public administration. Utilities showed the biggest difference between EGR 7 and the state, paying \$125 more per week in EGR 7. This is quite an improvement over the past four years: at the same time in 2001, the state exceeded EGR 7s pay by \$29.

TABLE 2: CHANGE IN JOBS IN EGR 7 AND INDIANA, 2001:3 TO 2005:3

Industry	EGR 7			Indiana		
	2005:3	Change	Percent Change	2005:3	Change	Percent Change
Total	84,322	103	0.1	2,879,527	7,553	0.3
Manufacturing	15,232	292	2.0	572,432	-39,048	-6.4
Health Care and Social Services	11,047	1,320	13.6	348,193	26,688	8.3
Retail Trade	11,177	-1,622	-12.7	332,377	-13,955	-4.0
Accommodation and Food Services	7,654	112	1.5	240,761	9,681	4.2
Educational Services	8,185	356	4.5	207,280	11,293	5.8
Administrative, Support and Waste Management	3,041	18	0.6	163,665	22,953	16.3
Construction	3,975	-41	-1.0	156,147	-367	-0.2
Public Administration	6,644	-34	-0.5	131,786	646	0.5
Transportation and Warehousing	2,623	128	5.1	128,179	-1,730	-1.3
Wholesale Trade	1,801	-100	-5.3	122,664	-473	-0.4
Finance and Insurance	2,296	-107	-4.5	100,555	-4,378	-4.2
Professional, Scientific and Technical Services	1,489	83	5.9	90,212	4,221	4.9
Other Services (Except Public Administration)	2,551	-123	-4.6	84,382	-2,485	-2.9
Arts, Entertainment and Recreation	622	115	22.7	49,948	289	0.6
Information	1,210	-160	-11.7	47,446	-4,000	-7.8
Real Estate, Rental and Leasing	936	94	11.2	39,072	-9	0.0
Management of Companies and Enterprises	168	-117	-41.1	26,175	-372	-1.4
Utilities	564	-43	-7.1	16,508	11	0.1
Agriculture, Forestry, Fishing and Hunting	409	-14	-3.3	14,289	-1,137	-7.4
Mining	49	-243	-83.2	6,567	-426	-6.1

Source: IBRC, using Bureau of Labor Statistics data

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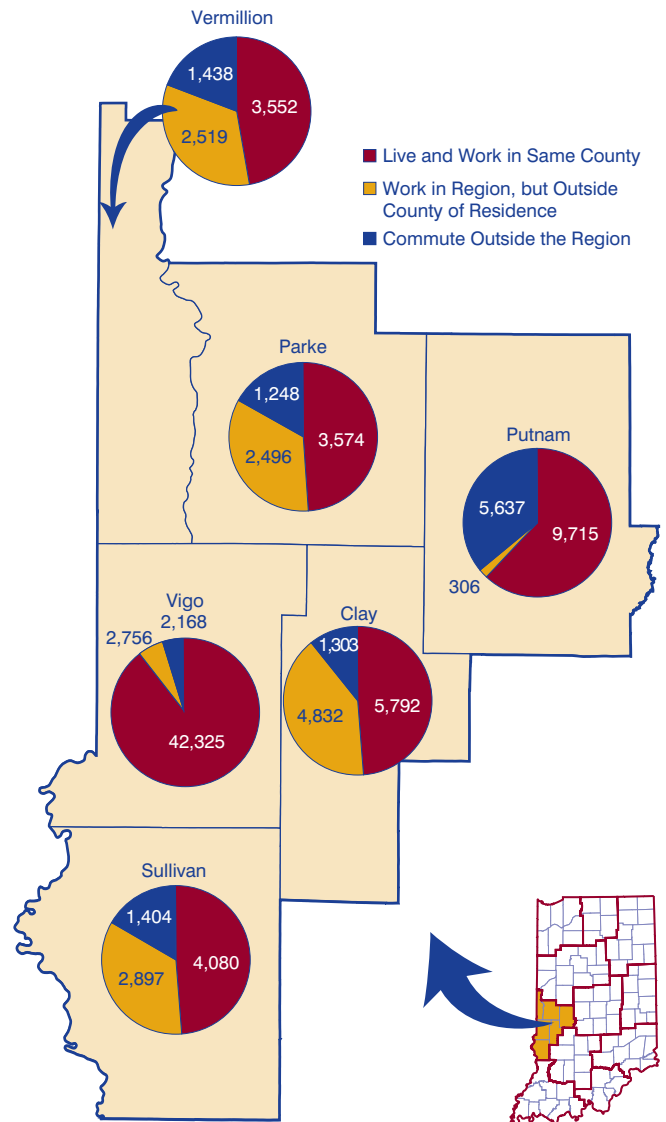
Commuting

Of the approximately 91,100 people who work in EGR 7, 93.2 percent also live in the region.

Figure 4 shows the commuting patterns for Region 7. At the local level, Vigo County unsurprisingly received the most workers from fellow EGR counties, with more than 9,500 people coming in from other parts of the region to work. Next in line was Putnam County with almost 1,900 workers coming from elsewhere within the region.

Meanwhile, Clay County contributed the highest number of workers to the other five counties in the region, sending out over 4,800 workers. Putnam County was the only county that did not provide workers to every other county in the region. Even when it did send out workers to other regional counties, it wasn't sending an equal share. Five of the six counties sent out at least 2,400 workers to other parts of the region; compare that to the 306 people sent out by Putnam County.

FIGURE 4: EGR 7 COMMUTING PATTERNS, 2000



Source: IBRC, using U.S. Census Bureau data

—Molly Marlatt, Research Associate, Indiana Business Research Center, Kelley School of Business, Indiana University