

Yavapai
COLLEGE

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Environmental Scan Summary

2007-08

Office of Academic Affairs

The Office of Institutional Research

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Environmental Scanning Highlights

- As economic costs continue to rise, community college students on average spend \$2,272 annually on tuition, while the average public four-year college tuition is \$5,836. The average in-state tuition cost for a student with 15 hours/semester at Yavapai College is \$1,470 or 35% lower than the national average.
- Research from the University of Arizona's Eller College of Management suggests that Arizona is probably in recession now. The recession of 2007-08 should last a year, give or take a few months, and be relative mild.
- Yavapai College has programs in place or development for six of the 12 highest paying occupations in the region.
- YC offers programs or coursework directly related to 21 of the 30 fastest growing occupations in Arizona.
- YC program areas in the fastest growing occupations include: Registered Nurses, Police and Sheriff Officers, Paralegals, Automotive Service Mechanics, Allied Health, Medical Transcription, Nursing Aides, Emergency Medical Technicians, Preschool Teachers, and Mining (industrial equipment, diesel engines).
- Yavapai County's rapid growth is expected to continue over the next five years. Current population estimates show Yavapai County as the home of 207,656 persons in 2007, and this figure is projected to grow 18% over the next five years.
- Population projections for the next five years continue to suggest a viable market for recruiting traditional age students in east and west Yavapai County. The 20 to 24 age group is forecasted to increase by 12% countywide.

**Environmental Scan Summary
Yavapai College
2007-2008**

National Outlook

Today 46% of all undergraduates attend one of the more than 1,200 community colleges that exist in the United States. As economic costs continue to rise, community college students on average spend \$2,272 annual on tuition, while the average public four-year college tuition is \$5,836. Community colleges continue to be at the forefront of cost-effective and rapid training of the U.S. workforce. Nationally almost 7 million students are enrolled in credit courses, and annually 550,000 associate degrees and 270,000 certificates are awarded by community colleges¹.

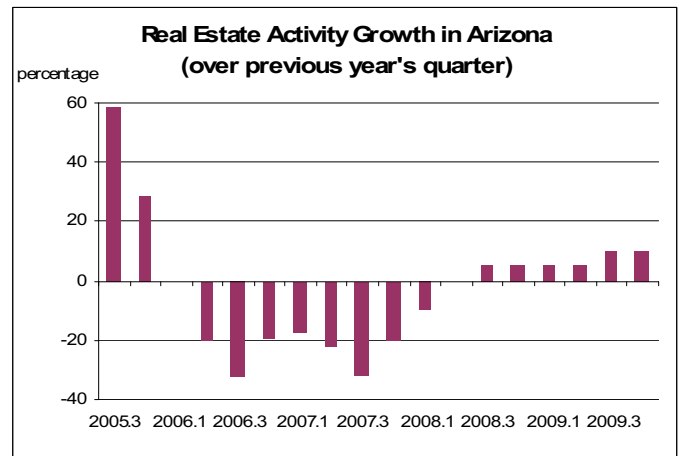
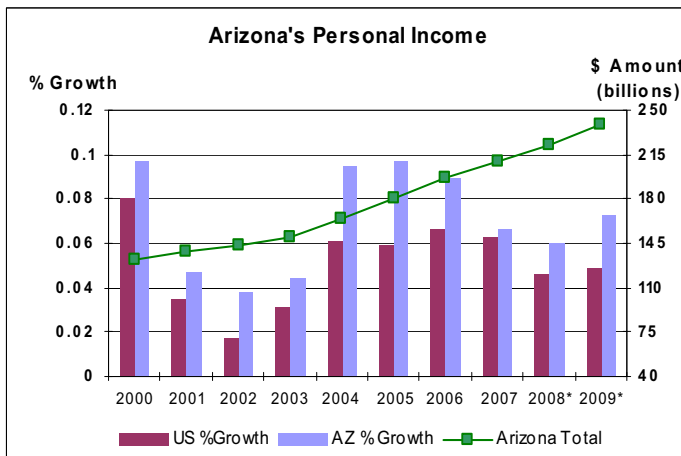
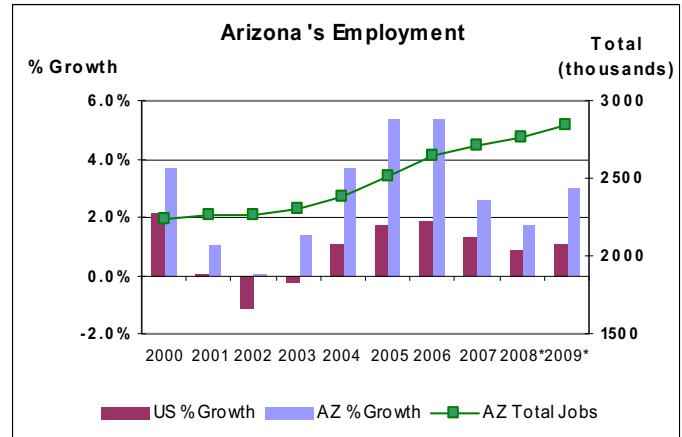
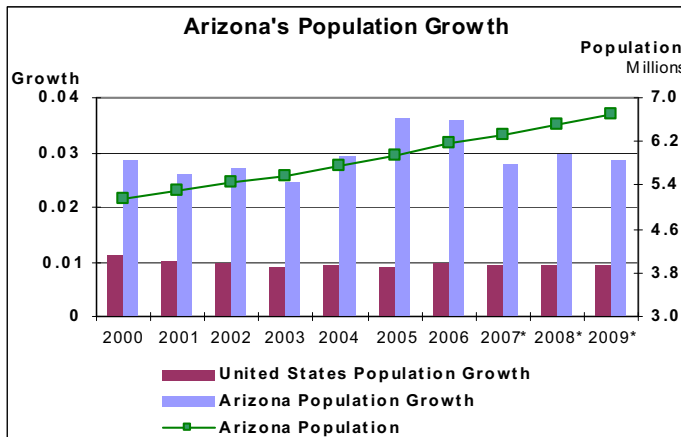
Arizona Outlook

Research from the University of Arizona's Eller College of Management suggests that Arizona is probably in recession now. "Data we have now indicates that a case can be made that the economy peaked as early as the second quarter of 2007. More likely, the data eventually will show that a recession began in the third quarter 2007, punctuated by the collapse of the mortgage lending industry. The recession of 2007-08 should last a year give or take a few months, and be relatively mild."⁴

According to the State of Arizona, Governor's Budget Briefing Report, Yavapai College is looking at probably two years of very difficult budget challenges due to budgeting shortfalls in the legislature. There is little doubt that we will have a decline in the portion of funding from the State of Arizona. Recent tax levies on a local level reflect a decline. In the planning process, the college has to continue to pursue efficiencies and prioritize programs, those that are existing and at the same time freeing up funds to begin programs that have potential for the future.

The following page was taken from the Arizona Governor's Budget Briefing Report and illustrates the Arizona economic indicators for fiscal year 2009.

Arizona Economic Indicators – Calendar Years 2006 Through 2009



Source: US Census Bureau, BEA, Arizona DES

*2008 and 2009 are projections from Census Bureau, Global Insight, Arizona DES, Arizona Blue Chip, and ASU

III. Arizona Outlook

- Population growth in 2007 was 2.9% annually, ranked 2nd in the nation; in-migration/in-flows remain strong.
- Employment growth was strong in 2006 with 5.4% growth, but slowed sharply in the 2nd half of 2007. Arizona economy is expected to continue to grow at a lower estimated growth rate of 2.5% in 2007 and 1.7% in 2008, and is expected to maintain a position among the leaders in the nation.
 - From January 2003 to November 2007, Arizona added 500,500 jobs.
 - Arizona's unemployment rate, currently at 4.1% is lower than the national average of 4.7%
 - Big corporations, such as Intel, are expanding in Arizona, creating new high-wage jobs.
- Personal income (PI) growth for 2006 of 8.9% ranked 3rd in the nation (after Louisiana and Wyoming); PI growth has slowed to 6.7% in the first 3 quarters of 2007, and is expected to grow at 6.0% in 2008.
- Real estate activities decreased by 23% in 2007, and are expected to further decrease in quarter 1 of 2008 before slowly recovering to modest growth in the second half of 2008 and into 2009.
- Consumers continue to spend at a slower rate; retail sales are estimated to grow 4.4% in 2007, and 4.2% in 2008, according to Arizona Blue Chip's consensus forecast.

IV. Arizona Risks

- Any prolonged national downturn will adversely affect the state as it has in the past. Arizona's export, construction and hospitality industries would suffer.
- Arizona is more exposed than most states to the real estate cycle. The state enjoyed considerable growth and prosperity in the up trend of the cycle and in 2007 will experience a drag due to the slowing of real estate activity.

Yavapai County Outlook

Yavapai County and its major cities and towns are expected to continue to grow rapidly in the next five years. Current forecasts show Yavapai County growing 18% over the next half decade⁵. The fastest and highest growth category is in the age group of 25 to 39 years of age. This age group is predicted to grow by 37% over the next five years from 34,370 to 47,207. Another growth area continues to be older individuals who relocate to the area.

In 2006, in-migration to the county totaled 15,453 representing 7.4% of Yavapai County population. One-fourth of those migrating to Yavapai County came from Maricopa County, Arizona. Out-migration from Yavapai County totaled 8,962 representing 4.3% of Yavapai County population. One-third of the out-migration population went to other counties of Arizona.

Major industries in the county continue to be retail trade, services, and public administration. Best paying industries include: finance, insurance and real estate, public administration, and manufacturing⁶. While manufacturing is one of the best paying sectors, it's relatively small.

Occupational Outlook

The occupational outlook uses data from the Arizona Department of Economic Security (DES) and focuses on trends in the highest paying and fastest growing occupations in Arizona. For this report only, occupations that require postsecondary training up through Associates Degrees are included. Additionally, only occupations with job growth of 199 or more jobs are included.

Highest Paying Occupations - Arizona

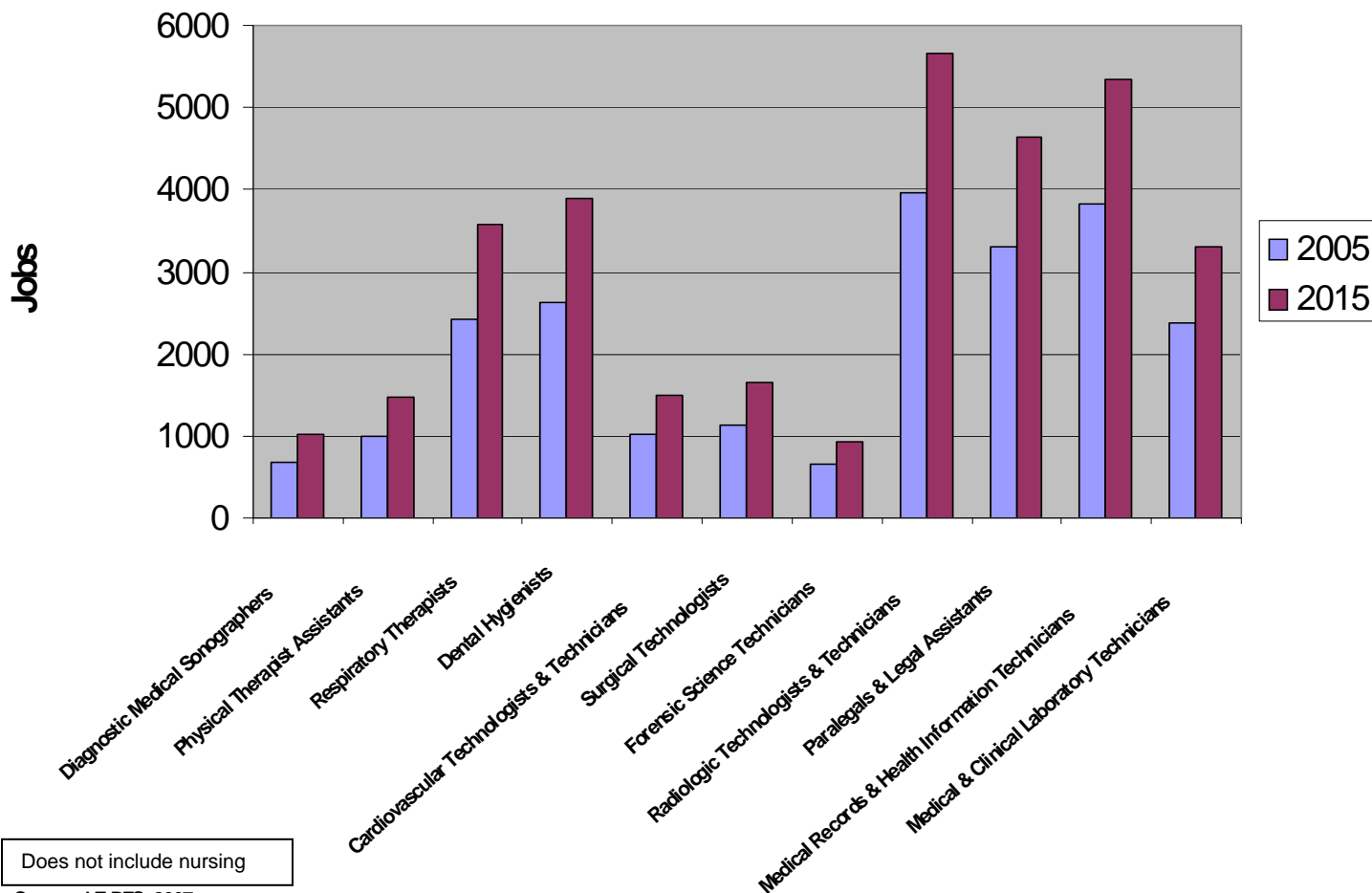
Occupation Title	Average Salary	2005 Jobs	2015 Jobs
Dental Hygienists	\$71,453.00	2636	3889
Diagnostic Medical Sonographers	\$61,728.00	671	1023
Registered Nurses	\$56,277.00	33936	50300
Commercial Pilots	\$51,035.00	1012	1280
Aircraft Mechanics & Service Technicians	\$48,785.00	2856	3357
Electrical & Electronics Repairers,	\$47,801.00	1202	1519
Forensic Science Technicians	\$47,706.00	648	935
Computer Specialists, All Other	\$46,148.00	1183	1460
Radiologic Technologists & Technicians	\$45,256.00	3964	5668
Paralegals & Legal Assistants	\$44,610.00	3312	4635
Electrical & Electronic Engineering	\$44,519.00	5801	6494
Computer Support Specialists	\$43,768.00	12196	15432

Source: AZ DES, 2007

Note: occupations limited to those requiring a postsecondary vocational or Associates Degree

- Yavapai College has programs in place or in development for six of the 12 highest paying occupations in the region.
- Radiologic Technician and Diagnostic Sonographer are set to come on line fall 2009.
- Other high paying occupations (those above the Yavapai County median income figure of \$37,000) include: Registered Nurse, Police and Sheriff Officers, Paralegals, Computer Specialists, Automotive Service Mechanics, and Architectural drafters. Please see the appendix for a complete listing of high paying occupations.

Fastest Growing Occupations



- Registered Nurse positions are forecast to grow from 33,936 in 2005 to 50,300 in 2015. Registered Nurses are not only one of the fastest growing occupations, but also high paying with an average salary of \$56,277.
- Yavapai College offers programs or coursework directly related to 21 of the 30 fastest growing occupations. Please see the appendix for a listing of the fastest growing occupations in Arizona.
- YC Programs in the fastest growing occupations include: Registered Nurses, Police and Sheriff Officers, Paralegals, Automotive Service Mechanics, Allied Health, Medical Transcription, Nursing Aides, Emergency Medical Technicians, Preschool Teachers, and Mining (industrial equipment, diesel engines).

Geo-Demographic Trends

Yavapai County Population by Location Areas and Selected Age Groups

Age Groups	15-19		20-24		25-39		40-49		50-64		All Ages	
	2007	2012	2007	2012	2007	2012	2007	2012	2007	2012	2007	2012
County Pop.	12,659	12,736 (1%)	12,930	14,506 (12%)	34,370	47,207 (37%)	25,091	25,223 (1%)	44,271	51,267 (16%)	207,656	245,725 (18%)

East County	15-19		20-24		25-39		40-49		50-64		All Ages	
	2007	2012	2007	2012	2007	2012	2007	2012	2007	2012	2007	2012
Verde ¹	2,132	2,156 (1%)	1,864	2,100 (13%)	5,707	7,787 (36%)	3,997	4,050 (1%)	6,327	7,304 (15%)	33,108	39,210 (18%)
Camp Verde ²	932	924 (-1%)	806	912 (13%)	2,463	3,371 (37%)	1,677	1,683 (0%)	3,008	3,452 (15%)	14,287	16,876 (18%)
Sedona	605	615 (2%)	566	637 (13%)	1,999	2,759 (38%)	1,930	1,949 (1%)	3,978	4,626 (16%)	14,661	17,351 (18%)
East Total	3,669	3,695 (1%)	3,236	3,649 (13%)	10,169	13,917 (37%)	7,604	7,682 (1%)	13,313	15,382 (16%)	62,056	73,437 (18%)

West County	15-19		20-24		25-39		40-49		50-64		All Ages	
	2007	2012	2007	2012	2007	2012	2007	2012	2007	2012	2007	2012
Prescott	3,644	3,691 (1%)	4,756	5,353 (13%)	8,297	11,458 (38%)	7,000	7,022 (0%)	14,047	16,372 (17%)	60,460	71,498 (18%)
Prescott Valley	2,736	2,719 (-1%)	2,988	3,320 (11%)	9,311	12,725 (37%)	5,134	5,125 (0%)	7,158	8,175 (14%)	43,524	51,545 (18%)
Chino Valley ³	1,402	1,408 (0%)	1,019	1,140 (12%)	3,508	4,862 (39%)	2,755	2,776 (1%)	4,088	4,726 (16%)	19,443	23,010 (18%)
69 Corridor ⁴	647	648 (0%)	427	475 (11%)	1,572	2,170 (38%)	1,292	1,286 (0%)	2,995	3,496 (17%)	11,957	14,131 (18%)
Blk Canyon/Crown King	107	105 (-2%)	101	113 (11%)	365	507 (39%)	355	353 (-1%)	632	735 (16%)	2,372	2,798 (18%)
Congress ⁵	259	264 (2%)	252	283 (12%)	724	989 (37%)	599	608 (2%)	1,356	1,591 (17%)	5,180	6,136 (18%)
Ash Fork/Seligman	170	181 (7%)	138	158 (15%)	350	475 (36%)	292	313 (7%)	556	651 (17%)	2,231	2,658 (19%)
West Total	8,965	9,016 (1%)	9,681	10,842 (12%)	24,127	33,186 (38%)	17,427	17,483 (0%)	30,832	35,746 (16%)	145,167	171,776 (18%)

Source: Economic Modeling Specialists, Inc. - SEPT 2007

Data Sources and Calculations

Demographic Data

The demographic data in this report is compiled from several sources using a specialized process. Sources include US Census Bureau annual estimates, birth and mortality rates from the U.S. Health Department, and projected regional job growth.

State Data Sources

This report uses state data from the following agencies: Arizona Department of Economic Security, Research Administration.

¹Clarkdale, Cottonwood, Cornville, Jerome; ²Camp Verde, Rimrock, Lake Montezuma; ³Chino, Paulden; ⁴Dewey, Humboldt, Mayer; ⁵Congress, Yarnell, Bagdad, Iron Springs, Kirkland.

Notes: EMSI sub-county data uses zip code information to group areas.

- Yavapai County's rapid growth is expected to continue over the next five years. Current population estimates show Yavapai County as the home of 207,656 persons in 2007, and this figure is projected to grow 18% over the next five years.
- Hispanics are the fastest growing population sector and are projected to grow 22% over the next five years and represent 13% of the county's population. The Hispanic population is also considerably younger (median age 26) than the county median average of 46 years of age.
- Population projections for the next five years continue to suggest a viable market for recruiting traditional age students in east and west Yavapai County. The 20 to 24 age group is projected to increase by 12%.
- Past surveys of traditional age students 18-24 show that parents have the strongest influence on students' higher education decisions. Therefore, in addition to marketing to high school students, their parents should also be courted.
- The largest and fastest market growth is occurring in the age range between 25 and 39. Because the majority of this group is already in the workforce the college will have to ensure offerings that meet people's busy lives. On-line, evening and weekend courses will be more important and in demand than ever. Additionally, the predicted rising unemployment rate suggests that many of these students may return to higher education to update and learn new workforce skills if an economic downturn occurs.

¹American Association of Community Colleges (2006). Community College Fact Sheet.

²Wingett, Yvonne and Benson, Matthew (2007). Migrant Law Blocks Benefits: Prop. 300 Denying College Aid, Child Care. Arizona Republic August 2, 2007.

³Barnes (2007). End of Session Report 2007.

⁴Vest, Marshall, (2007). Economic Outlook for 2008-2009 Turbulence Ahead: Eller College of Business and Public Administration, University of Arizona.

⁵CCBenefits, Community College Strategic Planner, (2007): Population Estimates 2006 and 2011.

⁶Profile: Yavapai County, Arizona: 2006. Arizona Department of Commerce.

Appendix

Source Documents:

Arizona Department of Commerce Report – April 2007
American Association of Community Colleges

Highest Paying Occupations - Arizona

Occupation Title	2005	2015	Change	% Change	Average Annual \$	Education Level
Dental Hygienists	2636	3889	1253	47.53%	\$71,453.00	Associate degree
Diagnostic Medical Sonographers	671	1023	352	52.46%	\$61,728.00	Associate degree
Registered Nurses	33936	50300	16364	48.22%	\$56,277.00	Associate degree
Commercial Pilots	1012	1280	268	26.48%	\$51,035.00	Postsecondary vocational training
Aircraft Mechanics & Service Technicians	2856	3357	501	17.54%	\$48,785.00	Postsecondary vocational training
Industrial Equipment	1202	1519	317	26.37%	\$47,801.00	Postsecondary vocational training
Forensic Science Technicians	648	935	287	44.29%	\$47,706.00	Associate degree
Computer Specialists, All Other	1183	1460	277	23.42%	\$46,148.00	Associate degree
Radiologic Technologists & Technicians	3964	5668	1704	42.99%	\$45,256.00	Associate degree
Paralegals & Legal Assistants	3312	4635	1323	39.95%	\$44,610.00	Associate degree
Electrical & Electronic Engineering Technicians	5801	6494	693	11.95%	\$44,519.00	Associate degree
Computer Support Specialists	12196	15432	3236	26.53%	\$43,768.00	Associate degree
Appraisers & Assessors of Real Estate	4184	4993	809	19.34%	\$42,847.00	Postsecondary vocational training
Mechanical Drafters	1586	1877	291	18.35%	\$42,126.00	Postsecondary vocational training
Mechanical Engineering Technicians	1205	1564	359	29.79%	\$41,865.00	Associate degree
Civil Engineering Technicians	1974	2474	500	25.33%	\$41,860.00	Associate degree
Respiratory Therapists	2413	3585	1172	48.57%	\$41,281.00	Associate degree
Architectural & Civil Drafters	2371	2731	360	15.18%	\$41,148.00	Postsecondary vocational training
Mobile Heavy Equipment Mechanics, Except Engines	2910	3630	720	24.74%	\$40,163.00	Postsecondary vocational training
Cardiovascular Technologists & Technicians	1008	1484	476	47.22%	\$39,925.00	Associate degree
Surgical Technologists	1128	1660	532	47.16%	\$39,664.00	Postsecondary vocational training
Interior Designers	2151	2573	422	19.62%	\$39,514.00	Associate degree
Other	1010	1402	392	38.81%	\$38,833.00	Postsecondary vocational training
Repairers	3024	3379	355	11.74%	\$38,701.00	Postsecondary vocational training
Licensed Practical & Licensed Vocational Nurses	9297	11894	2597	27.93%	\$38,615.00	Postsecondary vocational training
Automotive Service Technicians & Mechanics	17011	21195	4184	24.60%	\$38,044.00	Postsecondary vocational training
Legal Secretaries	4236	5400	1164	27.48%	\$37,426.00	Postsecondary vocational training
Security & Fire Alarm Systems Installers	2206	2950	744	33.73%	\$36,111.00	Postsecondary vocational training
Bus & Truck Mechanics & Diesel Engine Specialists	4206	5263	1057	25.13%	\$35,173.00	Postsecondary vocational training
Physical Therapist Assistants	991	1473	482	48.64%	\$33,826.00	Associate degree
Massage Therapists	2351	2860	509	21.65%	\$33,612.00	Postsecondary vocational training
Medical Transcriptionists	1909	2641	732	38.34%	\$30,371.00	Postsecondary vocational training
Medical Secretaries	5100	6264	1164	22.82%	\$28,460.00	Postsecondary vocational training
Medical & Clinical Laboratory Technicians	2368	3296	928	39.19%	\$28,345.00	Associate degree
Fitness Trainers & Aerobics Instructors	3724	4904	1180	31.69%	\$28,301.00	Postsecondary vocational training
Medical Records & Health Information Technicians	3825	5338	1513	39.56%	\$27,324.00	Associate degree
Travel Agents	2209	2639	430	19.47%	\$27,215.00	Postsecondary vocational training
Library Technicians	1957	2528	571	29.18%	\$26,891.00	Postsecondary vocational training
Veterinary Technologists & Technicians	1672	2247	575	34.39%	\$25,758.00	Associate degree
Emergency Medical Technicians & Paramedics	2705	3682	977	36.12%	\$25,533.00	Postsecondary vocational training
& Repairers	2175	2407	232	10.67%	\$24,143.00	Postsecondary vocational training
Slot Key Persons	2112	2594	482	22.82%	\$23,778.00	Postsecondary vocational training
Hairdressers, Hairstylists, & Cosmetologists	8562	9932	1370	16.00%	\$23,312.00	Postsecondary vocational training
Nursing Aides, Orderlies, & Attendants	20189	27909	7720	38.24%	\$22,021.00	Postsecondary vocational training
Preschool Teachers, Except Special Education	6370	8664	2294	36.01%	\$21,177.00	Postsecondary vocational training

Source: AZ DES, 2007

Note: limited to occupations with change in jobs greater than 199

Fastest Growing Occupations - Arizona

Occupation Title	2005	2015	Change	% Change	Average Annual \$	Education Level
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