

AN ALT30 POLIMETRICS RESEARCH PRODUCT

# Arizona Labor Market Monitor

Q3 2026 edition · Workforce Resilience Score v0.1.0

A quarterly reading of employment, wages, unemployment, and shock resilience across Arizona's 15 counties, built from federal administrative and survey data and summarized in one named index.

**Alt30** — Economic research

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Data through: LAUS Jul 2026 (preliminary) · QCEW 2026 Q1 (preliminary) · ACS 2022 5-year

**ALT-30**

This edition is unsponsored. Analysis, index construction, and findings are Alt30's.

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## Summary

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Arizona's covered employment stood at **3,159,818** jobs in 2026 Q1, -0.9% (-28,305 jobs) from 2025 Q1 [2]. The employment-weighted average weekly wage across all industries was **\$1,473**, up 4.3% year over year in nominal terms [2]. Weighted by covered employment, county unemployment averaged **5.4%** in Jul 2026, +0.6 pp from the same month a year earlier; 15 of 15 counties recorded a higher rate than a year ago [1].

The **Workforce Resilience Score** (WRS) ranks Arizona's 15 counties on four dimensions: current conditions, wages and industry, shock resilience, and workforce supply. **Maricopa County** leads this edition with a score of 75 (grade B); **Mohave County** is lowest at 32 (grade D). Grades are distributed B: 1, C: 8, D: 6. 15 of 15 county grades hold under  $\pm 25\%$  perturbation of the dimension weights; 0 are classified as volatile because they sit within a few points of a grade boundary.

Among private-sector industries, **health care & social assistance** added the most jobs year over year (+3,477, +0.7%), while **retail trade** recorded the largest decline (-5,646, -1.7%) [2]. The fastest county job growth was in **Santa Cruz County** (+2.7%); the largest year-over-year rise in unemployment was in **Yuma County** (+2.1 pp) [1].

**Reading this report.** Each source carries its own vintage and lag; they are never combined inside a single figure. County unemployment (LAUS) is monthly and not seasonally adjusted, so year-over-year comparisons are used throughout. QCEW employment and wages are quarterly, lag roughly two quarters, and the latest quarter is preliminary and subject to revision. Structural indicators are from the 2022 ACS 5-year estimates. Full detail in §2 and §7.

## Purpose and methodology

This report provides a quarterly assessment of labor market conditions in each of Arizona's 15 counties. It is intended for workforce development boards, economic development organizations, employers, and educational institutions that need a consistent, citable reading of local labor conditions between the release of official annual statistics.

The Workforce Resilience Score is a composite of 11 indicators grouped into four dimensions. Each indicator is oriented so that a higher value indicates a stronger or more resilient labor market, converted to a percentile rank among the 15 counties (0–100), averaged within its dimension, and combined using the dimension weights below. Letter grades are assigned at fixed cut points (A ≥ 80, B ≥ 65, C ≥ 45, D ≥ 30). Because normalization is within-state, the index describes a county's position relative to other Arizona counties, not relative to the nation.

### Current conditions — weight 30%

| INDICATOR                          | SOURCE                                                         | DIRECTION          |
|------------------------------------|----------------------------------------------------------------|--------------------|
| Unemployment rate, latest month    | BLS LAUS county unemployment, monthly, not seasonally adjusted | Lower is stronger  |
| Unemployment rate, 12-month change | BLS LAUS county unemployment, monthly, not seasonally adjusted | Lower is stronger  |
| Labor force participation, 16+     | Census ACS 5-year estimates                                    | Higher is stronger |

### Wages & industry — weight 30%

| INDICATOR                           | SOURCE                              | DIRECTION          |
|-------------------------------------|-------------------------------------|--------------------|
| Average weekly wage, all industries | BLS QCEW covered employment & wages | Higher is stronger |
| Average weekly wage, year-over-year | BLS QCEW covered employment & wages | Higher is stronger |
| Covered employment, year-over-year  | BLS QCEW covered employment & wages | Higher is stronger |
| Industry concentration (HHI)        | Census ACS 5-year estimates         | Lower is stronger  |

### Shock resilience — weight 25%

| INDICATOR                              | SOURCE                                                                 | DIRECTION         |
|----------------------------------------|------------------------------------------------------------------------|-------------------|
| Unemployment volatility, 2005–2024     | Alt30 ERI recovery-dynamics sub-scores (LAUS 2005–2024, BEA 2001–2024) | Lower is stronger |
| Post-COVID recovery gap (2022 vs 2019) | Alt30 ERI recovery-dynamics sub-scores (LAUS 2005–2024, BEA 2001–2024) | Lower is stronger |

### Workforce supply — weight 15%

| INDICATOR                        | SOURCE                      | DIRECTION          |
|----------------------------------|-----------------------------|--------------------|
| Bachelor's degree or higher, 25+ | Census ACS 5-year estimates | Higher is stronger |
| Age dependency ratio             | Census ACS 5-year estimates | Lower is stronger  |

### Grade confidence

Every edition re-runs a weight-sensitivity test: 2,000 draws in which each dimension weight is perturbed by up to  $\pm 25\%$  and the grade is recomputed. A county whose grade holds in at least 90% of draws is labeled *Robust*; 70–90% *Borderline*; below 70% *Volatile*. Volatile grades are not errors; they identify counties near a cut point whose letter should be read alongside the numeric score.

**Vintages in this edition**

|                                                                        |                                 |
|------------------------------------------------------------------------|---------------------------------|
| BLS LAUS county unemployment, monthly, not seasonally adjusted         | 2026-07 (preliminary)           |
| BLS QCEW covered employment & wages                                    | 2026Q1 (preliminary) vs. 2025Q1 |
| Census ACS 5-year estimates                                            | 2022                            |
| Alt30 ERI recovery-dynamics sub-scores (LAUS 2005-2024, BEA 2001-2024) | 1.0.0                           |

## Statewide labor market conditions

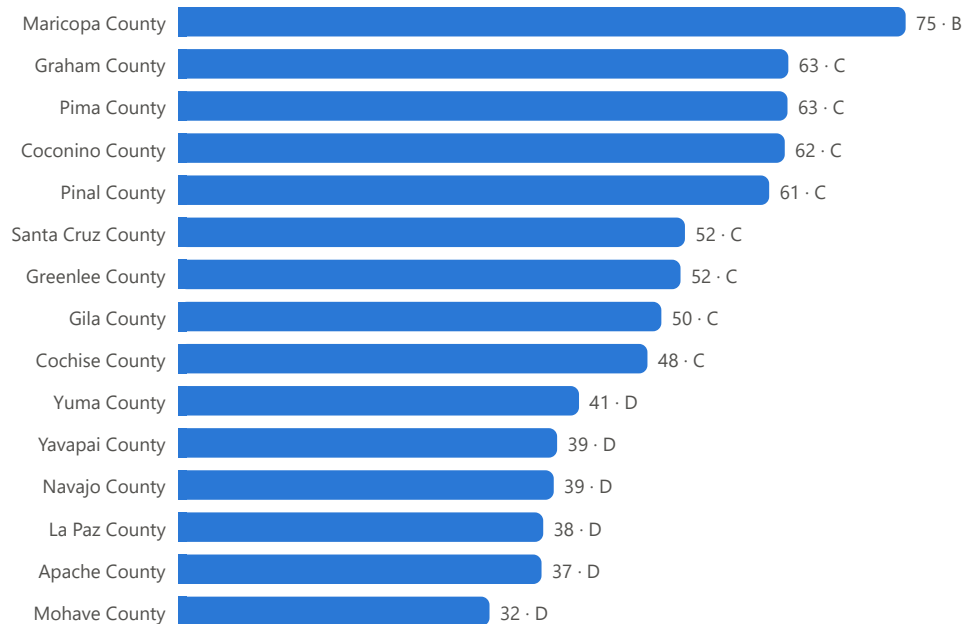
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Covered employment across Arizona's counties totaled 3,159,818 in 2026 Q1, a change of -28,305 jobs (-0.9%) from 2025 Q1 [2]. 4 of 15 counties added jobs over the year. Maricopa County accounts for 73% of the state's covered employment, so statewide aggregates largely reflect conditions in the Phoenix metro; the county tables that follow are where the divergence shows.

The employment-weighted average weekly wage was \$1,473 in 2026 Q1, up 4.3% from a year earlier before inflation adjustment [2]. Wage levels range from \$957 to \$2,151 across counties, a spread that reflects industry mix as much as local pay rates for comparable work.

County unemployment rates in Jul 2026 ranged from 3.8% to 18.9% [1]. The employment-weighted average of 5.4% compares with 4.7% in the same month of the prior year. These are not-seasonally-adjusted figures; the July reading in particular is affected by seasonal patterns in agriculture and education, which is why this report compares against the same month a year earlier rather than the prior month.

**Chart 1. Workforce Resilience Score by county, Q3 2026**



Source: Alt30 calculations from BLS LAUS, BLS QCEW, Census ACS. Percentile-based within Arizona; see §2.

## County rankings: the Workforce Resilience Score

TABLE 1. WORKFORCE RESILIENCE SCORE, DIMENSION SUB-SCORES, AND GRADE CONFIDENCE

| #  | COUNTY            | WRS         | GRADE    | CURRENT<br>CONDITIONS | WAGES &<br>INDUSTRY | SHOCK<br>RESILIENCE | WORKFORCE<br>SUPPLY | HOLD<br>% | CONFIDENCE |
|----|-------------------|-------------|----------|-----------------------|---------------------|---------------------|---------------------|-----------|------------|
| 1  | Maricopa County   | <b>74.7</b> | <b>B</b> | 93                    | 75                  | 43                  | 91                  | 100       | Robust     |
| 2  | Graham County     | <b>62.7</b> | <b>C</b> | 77                    | 68                  | 46                  | 50                  | 100       | Robust     |
| 3  | Pima County       | <b>62.6</b> | <b>C</b> | 67                    | 64                  | 43                  | 84                  | 100       | Robust     |
| 4  | Coconino County   | <b>62.3</b> | <b>C</b> | 70                    | 34                  | 64                  | 100                 | 96        | Robust     |
| 5  | Pinal County      | <b>60.7</b> | <b>C</b> | 60                    | 79                  | 43                  | 57                  | 100       | Robust     |
| 6  | Santa Cruz County | <b>52.1</b> | <b>C</b> | 38                    | 86                  | 29                  | 52                  | 100       | Robust     |
| 7  | Greenlee County   | <b>51.6</b> | <b>C</b> | 85                    | 52                  | 11                  | 54                  | 100       | Robust     |
| 8  | Gila County       | <b>49.6</b> | <b>C</b> | 50                    | 54                  | 57                  | 29                  | 100       | Robust     |
| 9  | Cochise County    | <b>48.2</b> | <b>C</b> | 33                    | 29                  | 82                  | 61                  | 98        | Robust     |
| 10 | Yuma County       | <b>41.2</b> | <b>D</b> | 21                    | 57                  | 50                  | 34                  | 100       | Robust     |
| 11 | Yavapai County    | <b>38.9</b> | <b>D</b> | 37                    | 34                  | 43                  | 46                  | 100       | Robust     |
| 12 | Navajo County     | <b>38.6</b> | <b>D</b> | 44                    | 16                  | 61                  | 36                  | 100       | Robust     |
| 13 | La Paz County     | <b>37.5</b> | <b>D</b> | 24                    | 27                  | 89                  | 0                   | 100       | Robust     |
| 14 | Apache County     | <b>37.3</b> | <b>D</b> | 31                    | 34                  | 50                  | 36                  | 100       | Robust     |
| 15 | Mohave County     | <b>32.0</b> | <b>D</b> | 20                    | 43                  | 39                  | 21                  | 100       | Robust     |

Source: Alt30 calculations. Sub-scores are within-Arizona percentiles (0–100). Hold % is the share of 2,000 weight-perturbation draws in which the grade is unchanged.

Maricopa County leads on the strength of its current conditions and workforce supply sub-scores. Counties graded D or F in this edition are those with high current unemployment, weak or negative covered-employment growth, and above-average historical volatility; their scores should be read as relative positions within Arizona rather than absolute judgments.

## Movers: largest year-over-year changes

TABLE 2. UNEMPLOYMENT RATE CHANGE, JUL 2026 VS. A YEAR EARLIER (PERCENTAGE POINTS)

| SMALLEST INCREASES | NOW  | CHANGE  | LARGEST DETERIORATIONS | NOW   | CHANGE  |
|--------------------|------|---------|------------------------|-------|---------|
| Graham County      | 5.2% | +0.4 pp | Yuma County            | 18.9% | +2.1 pp |
| Maricopa County    | 4.7% | +0.5 pp | Mohave County          | 6.9%  | +1.5 pp |
| Apache County      | 9.5% | +0.5 pp | Yavapai County         | 5.7%  | +1.1 pp |

Source: BLS LAUS, not seasonally adjusted [1].

COVERED EMPLOYMENT CHANGE, 2026 Q1 VS. 2025 Q1

| FASTEST GROWTH    | JOB    | Y/Y   | SLOWEST / DECLINING | JOB    | Y/Y   |
|-------------------|--------|-------|---------------------|--------|-------|
| Santa Cruz County | 14,797 | +2.7% | Cochise County      | 33,459 | -5.8% |
| Gila County       | 15,506 | +1.0% | Apache County       | 16,233 | -4.7% |
| Pinal County      | 81,073 | +0.7% | Coconino County     | 63,448 | -4.5% |

Source: BLS QCEW, all ownerships, third-month employment [2].

Small counties can post large percentage swings on modest absolute changes; a single employer opening or closing moves the rate in counties with fewer than 10,000 covered jobs. Where a mover is a small county, the absolute job figure alongside the percentage is the better guide to significance.

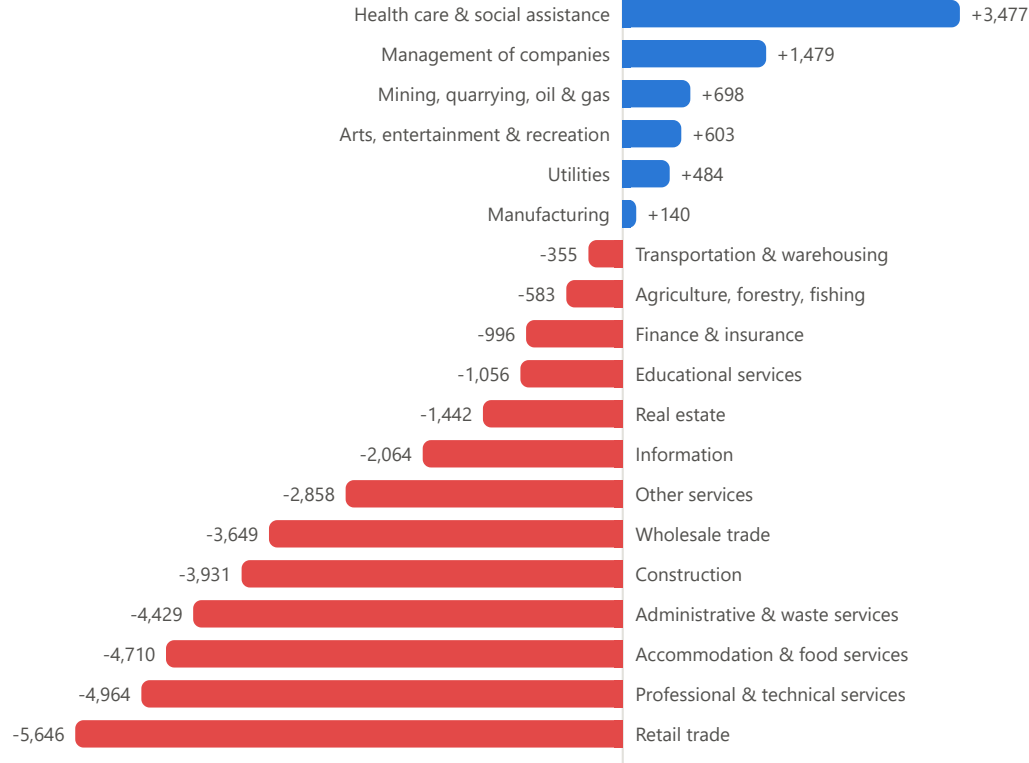
## Industry detail

TABLE 3. PRIVATE-SECTOR EMPLOYMENT AND WAGES BY NAICS SECTOR, STATEWIDE, 2026 Q1

| SECTOR                            | EMPLOYMENT | Y/Y CHANGE | Y/Y % | AVG WEEKLY WAGE | WAGE Y/Y |
|-----------------------------------|------------|------------|-------|-----------------|----------|
| Health care & social assistance   | 473,112    | +3,477     | +0.7% | \$1,340         | +2.7%    |
| Retail trade                      | 336,322    | -5,646     | -1.7% | \$939           | +1.3%    |
| Accommodation & food services     | 310,787    | -4,710     | -1.5% | \$646           | +4.2%    |
| Construction                      | 218,930    | -3,931     | -1.8% | \$1,635         | +4.9%    |
| Administrative & waste services   | 215,764    | -4,429     | -2.0% | \$1,133         | +3.7%    |
| Manufacturing                     | 191,241    | +140       | +0.1% | \$2,310         | +16.2%   |
| Finance & insurance               | 162,242    | -996       | -0.6% | \$2,784         | +6.6%    |
| Professional & technical services | 161,169    | -4,964     | -3.0% | \$2,146         | -0.4%    |
| Transportation & warehousing      | 135,352    | -355       | -0.3% | \$1,224         | +4.9%    |
| Wholesale trade                   | 110,489    | -3,649     | -3.2% | \$2,252         | +2.6%    |
| Other services                    | 83,503     | -2,858     | -3.3% | \$1,043         | +4.1%    |
| Educational services              | 72,137     | -1,056     | -1.4% | \$1,039         | +4.2%    |
| Arts, entertainment & recreation  | 58,744     | +603       | +1.0% | \$993           | +4.9%    |
| Real estate                       | 58,731     | -1,442     | -2.4% | \$1,626         | +3.9%    |
| Information                       | 42,381     | -2,064     | -4.6% | \$2,499         | +1.9%    |
| Management of companies           | 40,406     | +1,479     | +3.8% | \$3,301         | +2.3%    |
| Utilities                         | 13,375     | +484       | +3.8% | \$3,258         | +2.1%    |
| Agriculture, forestry, fishing    | 9,893      | -583       | -5.6% | \$962           | -0.0%    |
| Mining, quarrying, oil & gas      | 9,063      | +698       | +8.3% | \$3,078         | +11.3%   |

Source: BLS QCEW, private ownership, county sector cells summed across counties where both years are disclosable; suppressed cells excluded from both years [2]. Wages are employment-weighted, nominal.

### Chart 2. Year-over-year change in private-sector employment by sector, 2026 Q1



Source: BLS QCEW [2]. Bars to the right are gains; bars to the left are losses.

## What this index does and does not say

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**It is a relative ranking within Arizona.** Percentile normalization means a county's score describes its standing among the other 14 counties in this edition. A county can improve on every indicator and still lose rank if others improve faster. Scores are not comparable across states or to the national Economic Resiliency Index, which normalizes across all U.S. counties.

**Vintages differ by design.** Current-conditions indicators are as of Jul 2026; wage and employment indicators are as of 2026 Q1; structural indicators (participation, education, industry mix, age structure) are 2022 ACS 5-year estimates centered on 2020. The structural dimension therefore changes slowly and mostly reorders counties only when a new ACS vintage is adopted, which is noted in the edition's changelog.

**Not seasonally adjusted.** County LAUS data are not seasonally adjusted; the report uses same-month year-over-year comparisons for that reason. Month-to-month movements are not reported.

**Small-area precision.** ACS 5-year estimates for the smallest counties carry margins of error large enough that single-year differences are not meaningful; the index uses them only as slow-moving structural context. QCEW cells for sectors with few employers are suppressed by BLS and are excluded, not estimated. Sector totals in Table 3 therefore understate statewide employment in sectors concentrated in small counties.

**Wages are nominal and mix-dependent.** Average weekly wage reflects the mix of industries and hours as well as pay rates. A county whose wage rises because low-wage seasonal employment fell has not necessarily seen pay increases.

**Weights are a judgment.** The dimension weights are set by the authors and disclosed in §2. The sensitivity test reports how much each grade depends on them; it does not make the weights correct. Users who prefer a different weighting can recompute the index from the appendix table.

**Descriptive, not causal.** Nothing in this report estimates the effect of a policy or program. It describes conditions and their changes.

## Appendix A: full indicator table

TABLE A-1. RAW INDICATOR VALUES BY COUNTY

| COUNTY     | UNEMP.<br>JUL<br>2026 | 12-MO<br>CHG | LFPR  | COVERED<br>JOBS | JOBS<br>Y/Y | WKLY<br>WAGE | WAGE<br>Y/Y | IND.<br>HHI | UNEMP.<br>VOL. | COVID<br>GAP | BA+   | AGE<br>DEP. |
|------------|-----------------------|--------------|-------|-----------------|-------------|--------------|-------------|-------------|----------------|--------------|-------|-------------|
| Apache     | 9.5%                  | +0.5 pp      | 39.7% | 16,233          | -4.7%       | \$1,130      | +6.1%       | 0.209       | 4.04           | -2.3 pp      | 13.8% | 0.73        |
| Cochise    | 6.9%                  | +1.1 pp      | 50.1% | 33,459          | -5.8%       | \$1,200      | +1.1%       | 0.121       | 1.94           | -1.6 pp      | 26.7% | 0.80        |
| Coconino   | 5.8%                  | +0.6 pp      | 61.3% | 63,448          | -4.5%       | \$1,082      | +5.3%       | 0.149       | 2.23           | -1.5 pp      | 39.6% | 0.50        |
| Gila       | 5.2%                  | +0.7 pp      | 45.7% | 15,506          | +1.0%       | \$1,176      | +2.2%       | 0.126       | 2.74           | -1.6 pp      | 18.1% | 0.96        |
| Graham     | 5.2%                  | +0.4 pp      | 50.6% | 11,306          | +0.5%       | \$1,194      | +5.4%       | 0.119       | 3.03           | -1.4 pp      | 14.0% | 0.68        |
| Greenlee   | 3.8%                  | +0.6 pp      | 59.1% | 5,652           | -0.5%       | \$2,151      | +1.9%       | 0.192       | 4.48           | -1.1 pp      | 16.7% | 0.69        |
| La Paz     | 7.4%                  | +0.8 pp      | 43.0% | 6,656           | -3.8%       | \$957        | +1.2%       | 0.115       | 1.65           | -1.6 pp      | 12.4% | 1.31        |
| Maricopa   | 4.7%                  | +0.5 pp      | 65.0% | 2,297,478       | -0.5%       | \$1,570      | +3.9%       | 0.114       | 2.12           | -0.8 pp      | 35.0% | 0.63        |
| Mohave     | 6.9%                  | +1.5 pp      | 44.8% | 55,471          | -3.2%       | \$1,030      | +3.6%       | 0.119       | 3.03           | -1.4 pp      | 14.4% | 0.92        |
| Navajo     | 7.7%                  | +0.5 pp      | 45.7% | 27,393          | -3.8%       | \$968        | +1.7%       | 0.169       | 3.33           | -2.6 pp      | 17.3% | 0.81        |
| Pima       | 5.6%                  | +0.7 pp      | 58.4% | 383,823         | -1.9%       | \$1,332      | +7.9%       | 0.129       | 1.96           | -0.8 pp      | 35.0% | 0.68        |
| Pinal      | 5.6%                  | +0.7 pp      | 52.6% | 81,073          | +0.7%       | \$1,204      | +3.3%       | 0.108       | 2.45           | -1.2 pp      | 21.4% | 0.75        |
| Santa Cruz | 8.7%                  | +0.9 pp      | 57.2% | 14,797          | +2.7%       | \$1,198      | +7.3%       | 0.110       | 3.73           | -1.3 pp      | 23.5% | 0.81        |
| Yavapai    | 5.7%                  | +1.1 pp      | 48.7% | 71,332          | -1.3%       | \$1,076      | +1.4%       | 0.120       | 2.46           | -1.2 pp      | 28.7% | 0.94        |
| Yuma       | 18.9%                 | +2.1 pp      | 53.9% | 76,191          | -0.7%       | \$1,092      | +3.1%       | 0.108       | 5.55           | -4.5 pp      | 16.4% | 0.81        |

Sources: columns 2–3 BLS LAUS [1]; 5–8 BLS QCEW [2]; 4, 9, 12–13 Census ACS 2022 5-year [3]; 10–11 Alt30 ERI recovery dynamics [4].  
Machine-readable version: labor\_monitor\_results.csv.

## Sources

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1. U.S. Bureau of Labor Statistics, Local Area Unemployment Statistics (LAUS), county series LAUCN{fips}0000000003. <https://www.bls.gov/lau/>
2. U.S. Bureau of Labor Statistics, Quarterly Census of Employment and Wages (QCEW), Open Data API. <https://www.bls.gov/cew/>
3. U.S. Census Bureau, American Community Survey 5-Year Estimates (2022), Data Profiles DP02/DP03/DP05. <https://api.census.gov/data/2022/acs/acs5/profile>
4. Alt30, Economic Resiliency Index v1.0.0, recovery-dynamics dimension. Methodology & Research Brief. <https://base.alt-30.com/resilience>

## Reproducibility

Recipe: `config/reports/labor_monitor.yaml` v0.1.0. Build: `tools/build_labor_monitor.py`. Raw pulls cached under `data/raw/` with source URL and pull timestamp. Sponsor branding is applied at render time only and is not read by any data or scoring step.

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