
North Port-Sarasota-Bradenton & Tampa-St. Petersburg-Clearwater Regional Labor Market Context Analysis

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Outline of presentation

- Background: Data sources and full analysis content
- Highlights of analysis of recent labor market trends
 - Industry analysis
 - Employment by size
 - Career ladders
- Summary of potential opportunities



Data Analysis

- 4-county overview and analysis
- Demographics (people)
 - Education, race/ethnicity, age, industry/occupation, unionization
- Industry analysis (companies)
 - Overall structure
 - Growth, average payroll, concentration
- Sub-sector industry analysis
 - Health Care
 - Manufacturing
 - Information, and Professional & Technical Services (with particular emphasis on software production, and computer systems design and related)
 - Transportation & Warehousing
 - Construction
 - Finance and Insurance Industry
- Employment by employer-size analysis
 - By industry sub-sector
- Analysis of occupations
 - Occupational career ladders by industry sub-sector

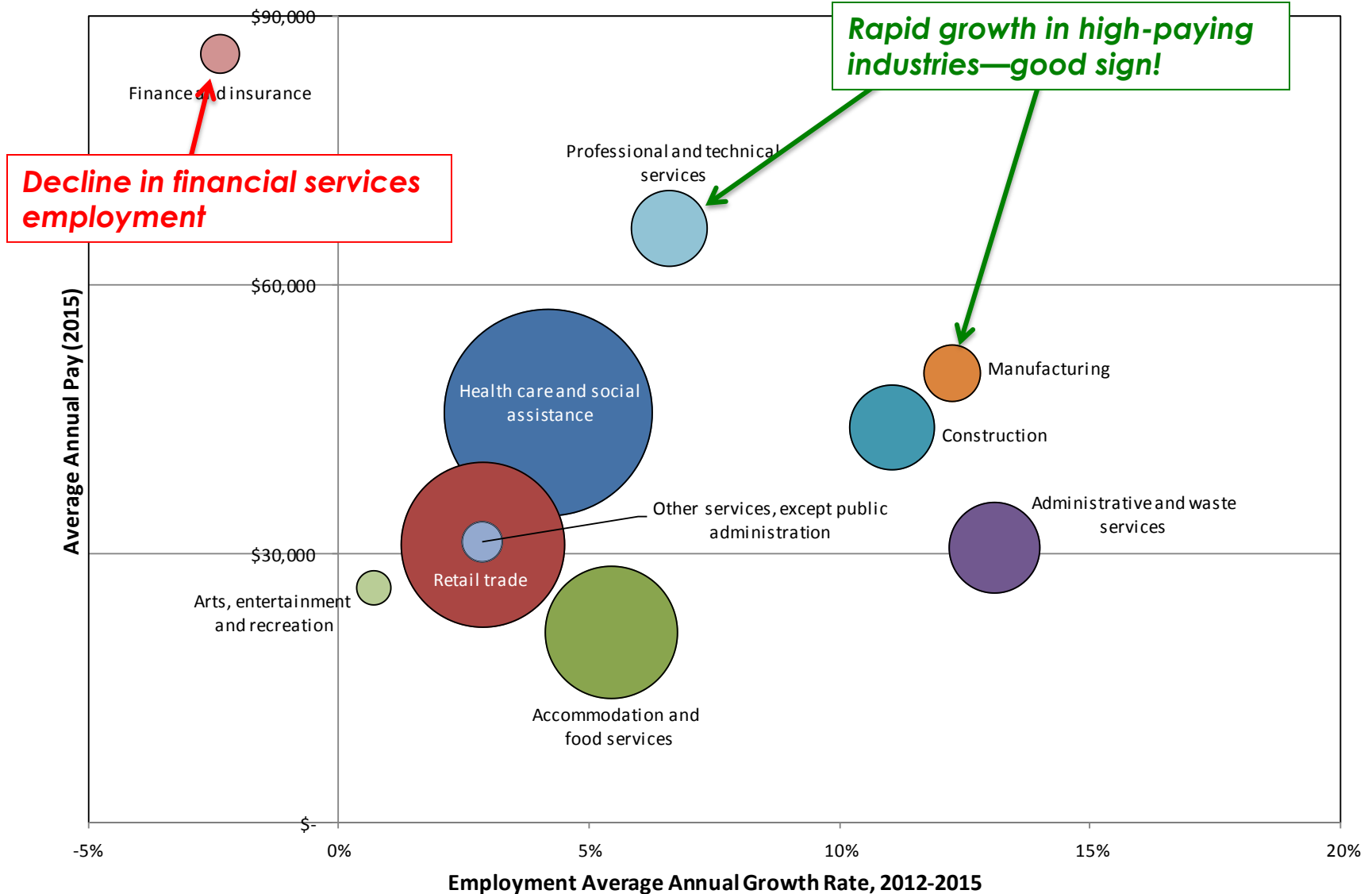
Summary-Sarasota/Manatee Counties

- Sarasota County faster growth overall—fastest in the region
- Most promising growth opportunities appear in:
 - Manufacturing (esp. fabricated metal products)
 - Professional and technical services (esp. computer systems design)
- Solid employment opportunities:
 - Health care remains an important, growing sector
 - Construction growing, though can be cyclical
- Lower priorities:
 - Transportation & Warehousing shows high growth, but small employment base
 - Financial Services show less robust growth
- Career ladders exist in all studied sectors, but educational requirements and certification opportunities vary

Overall Employment

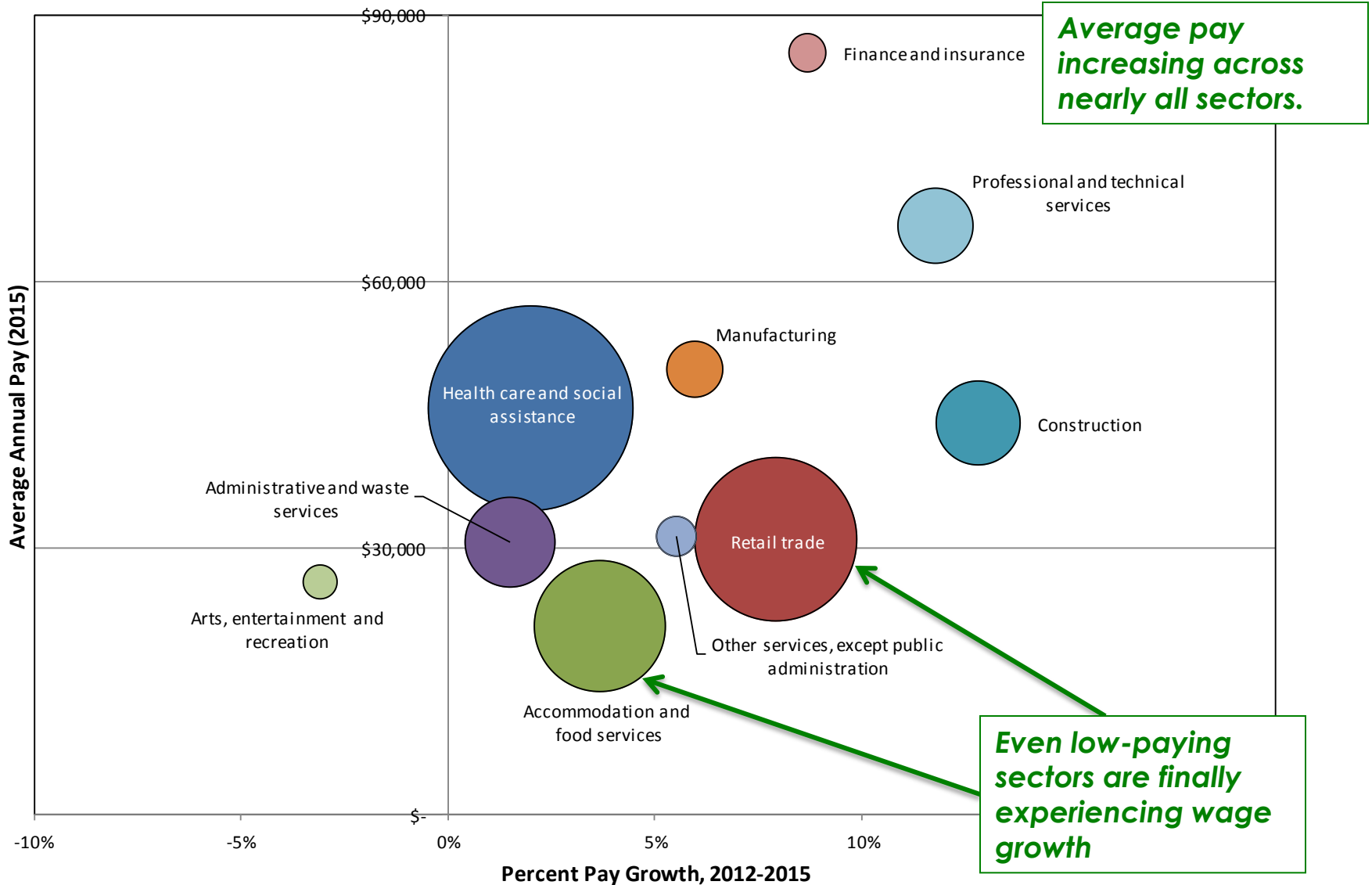
FLORIDA: SARASOTA COUNTY

Annual Average Pay, Size, and Growth, 10 Largest Private Industries



FLORIDA: SARASOTA COUNTY

Pay Growth, Size, and Average Pay, 10 Largest Private Industries

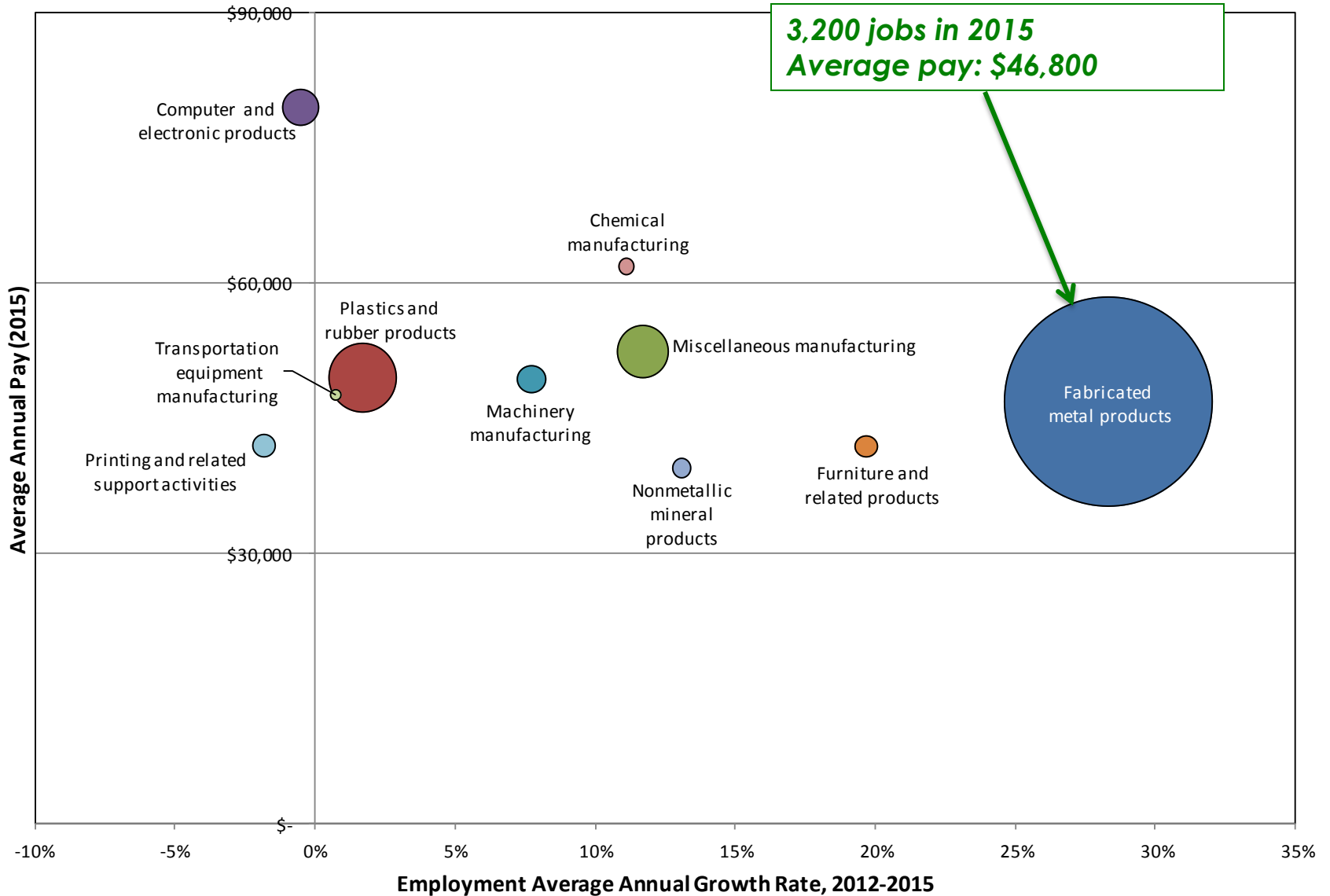


ANALYSIS OF SUB-SECTORS

Manufacturing

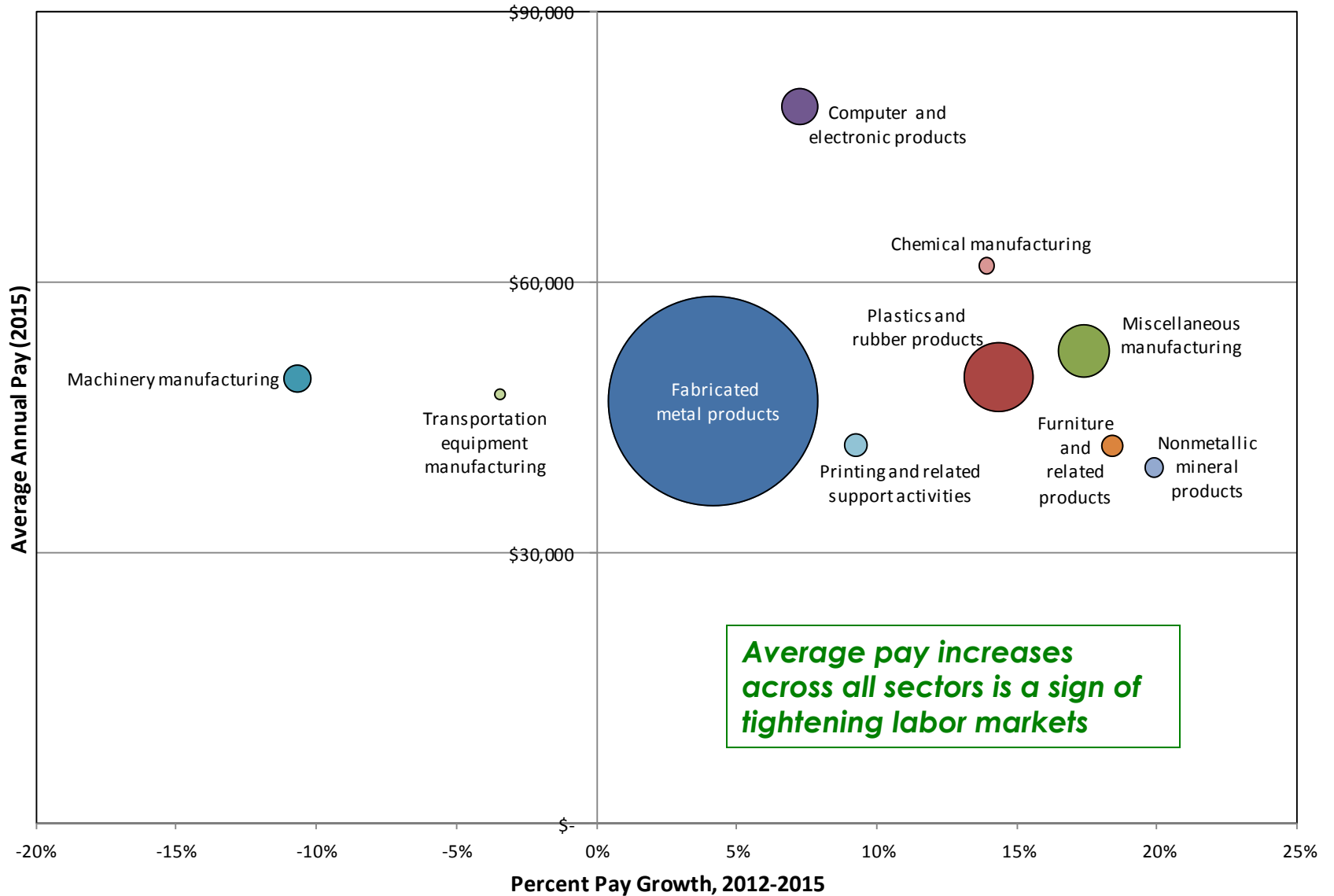
FLORIDA: SARASOTA COUNTY

Annual Average Pay, Size, and Growth, Manufacturing



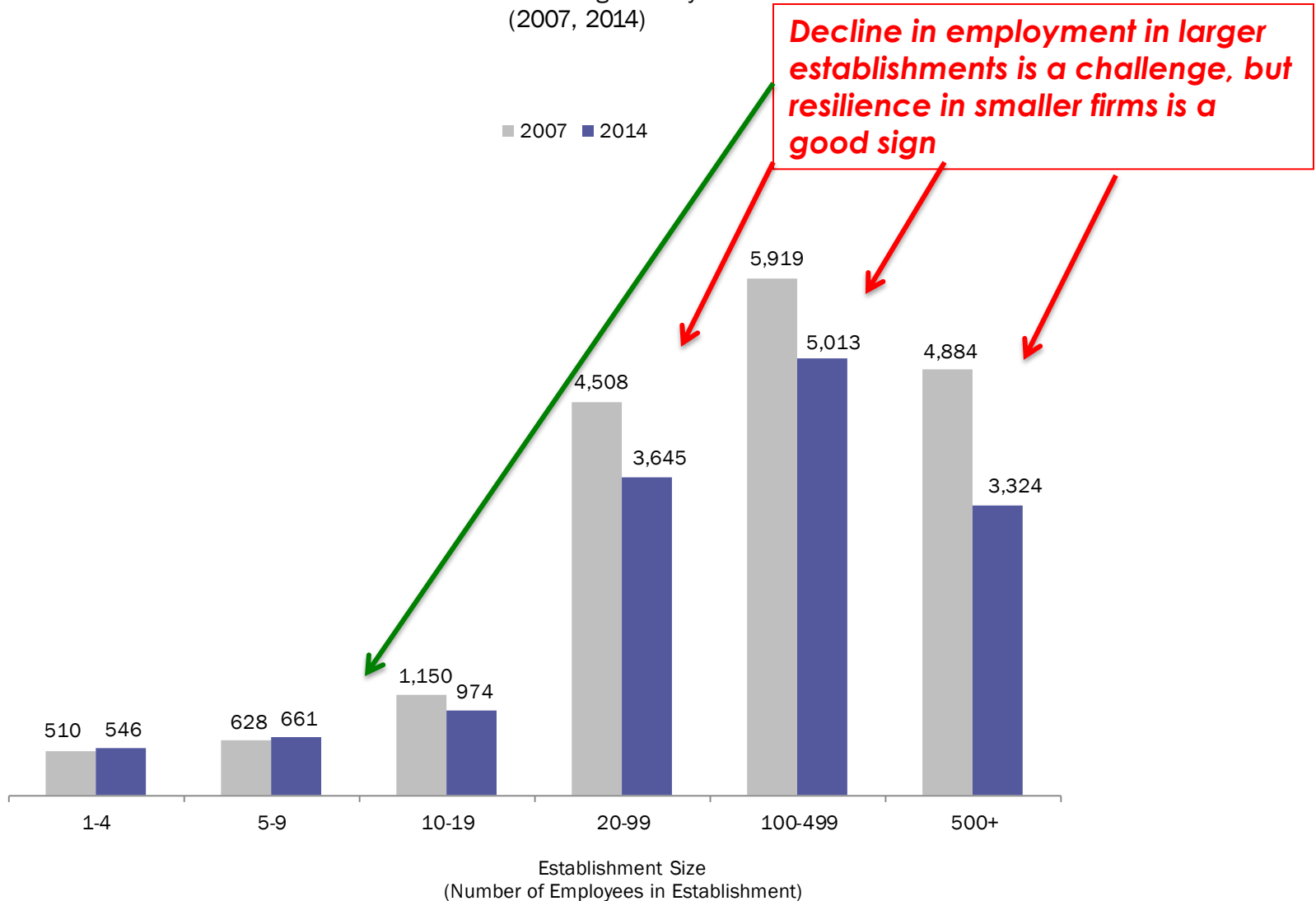
FLORIDA: SARASOTA COUNTY

Pay Growth, Size, and Average Pay, Manufacturing

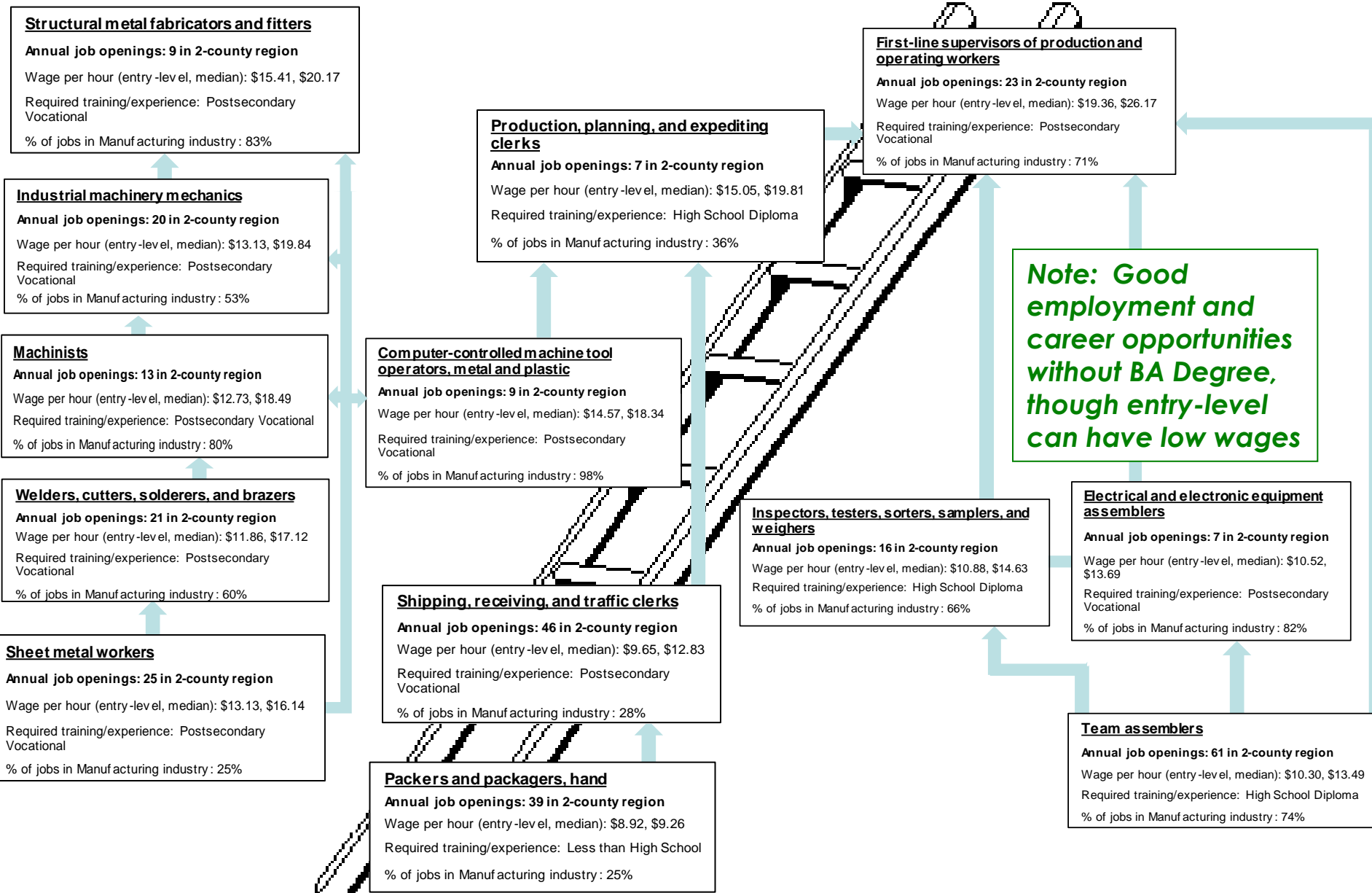


NORTH PORT-SARASOTA REGION: MANUFACTURING

North Port-Sarasota-Bradenton Region
Total Employment by Establishment Size Category
Manufacturing Industry
(2007, 2014)



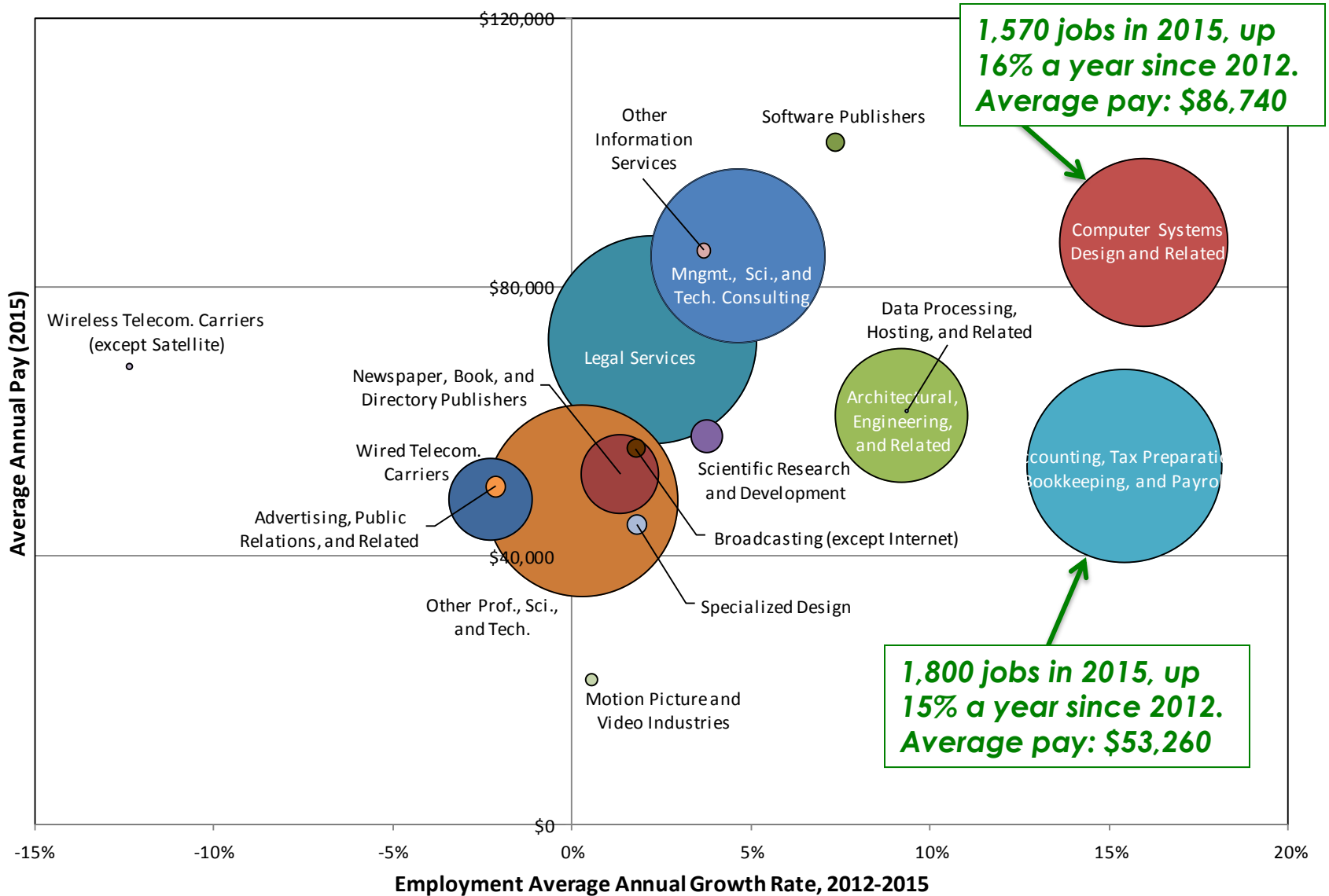
NORTH PORT-SARASOTA REGION: MANUFACTURING CAREER LADDER



ANALYSIS OF SUB-SECTORS

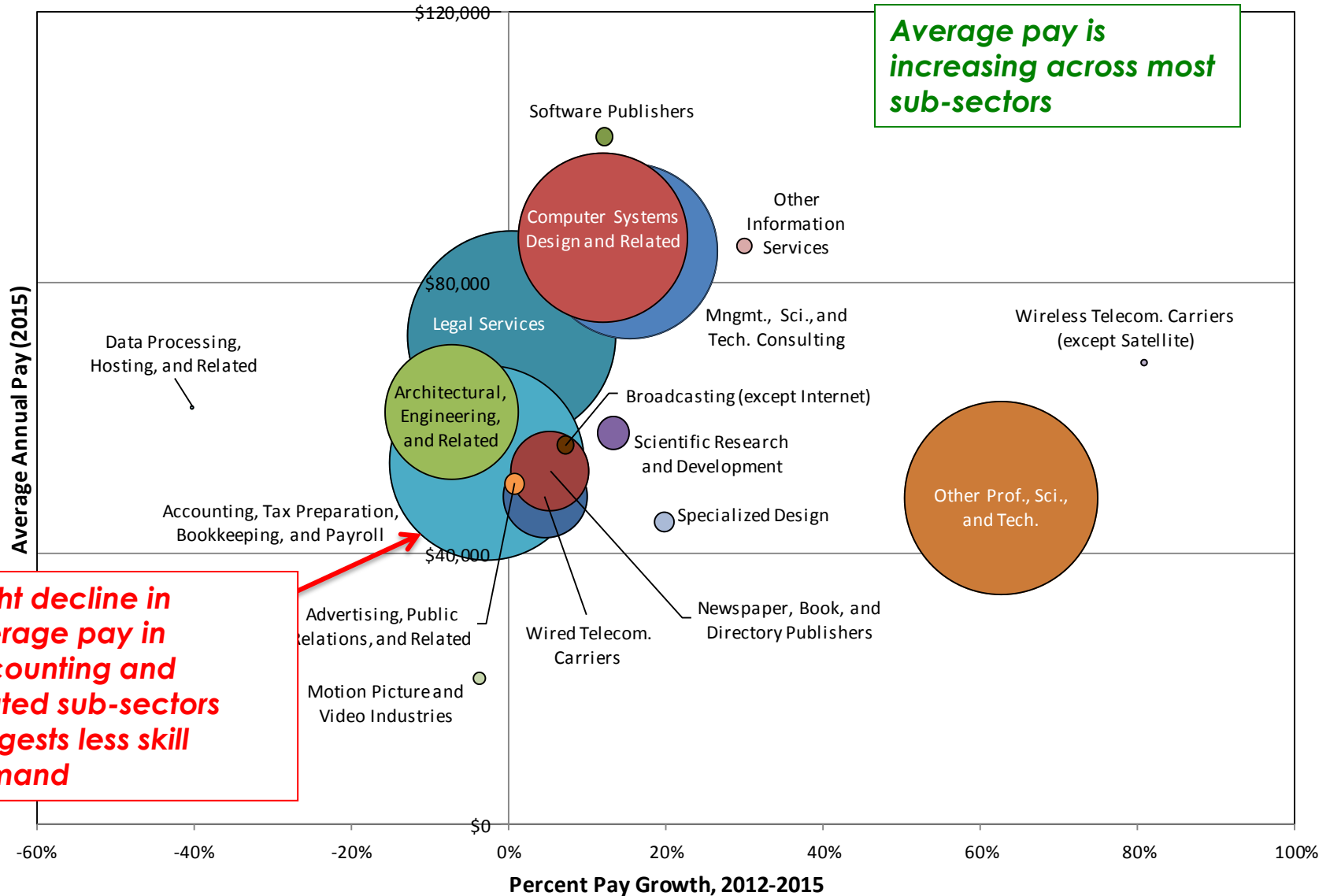
Information and Professional & Technical Services

Annual Average Pay, Size, and Growth, Information and Prof. & Tech. Services



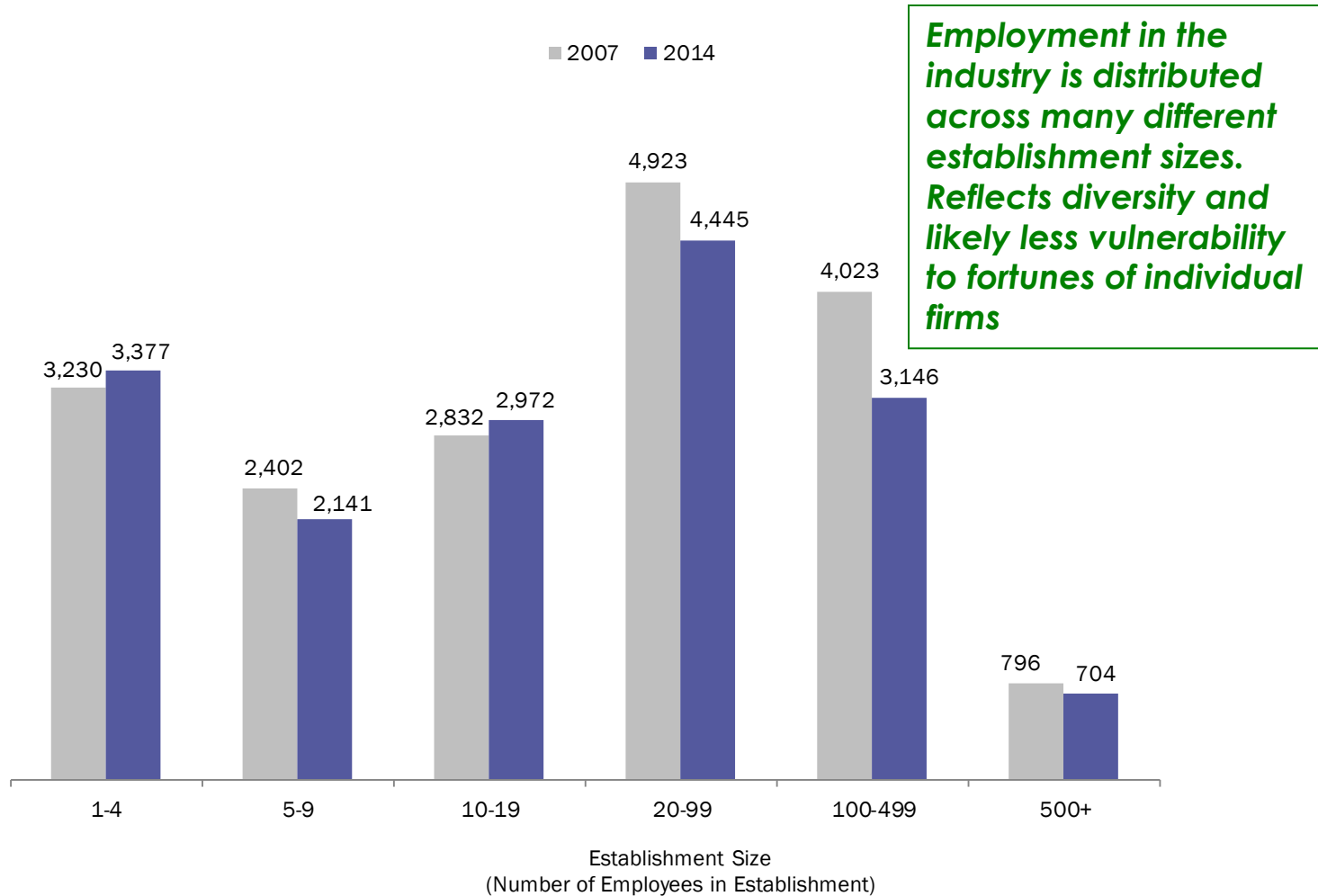
FLORIDA: SARASOTA COUNTY

Pay Growth, Size, and Average Pay, Information and Prof. & Tech. Services

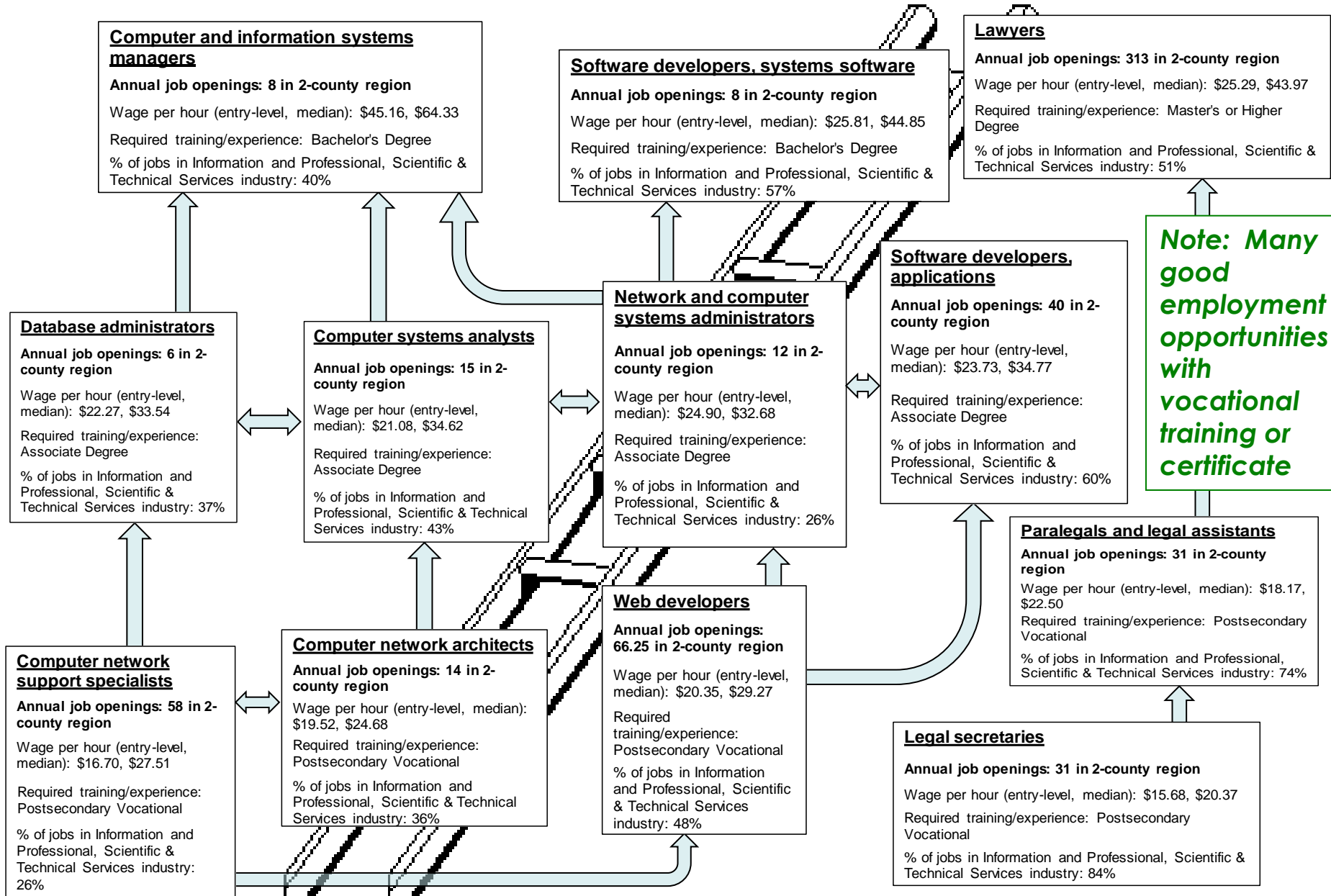


NORTH PORT-SARASOTA REGION: INFORMATION AND PROF. & TECH. SERVICES

North Port-Sarasota-Bradenton Region
Total Employment by Establishment Size Category
Information and Professional & Technical Services Industry
(2007, 2014)



NORTH PORT-SARASOTA REGION: INFORMATION AND PROF. & TECH. SERVICES CAREER LADDER

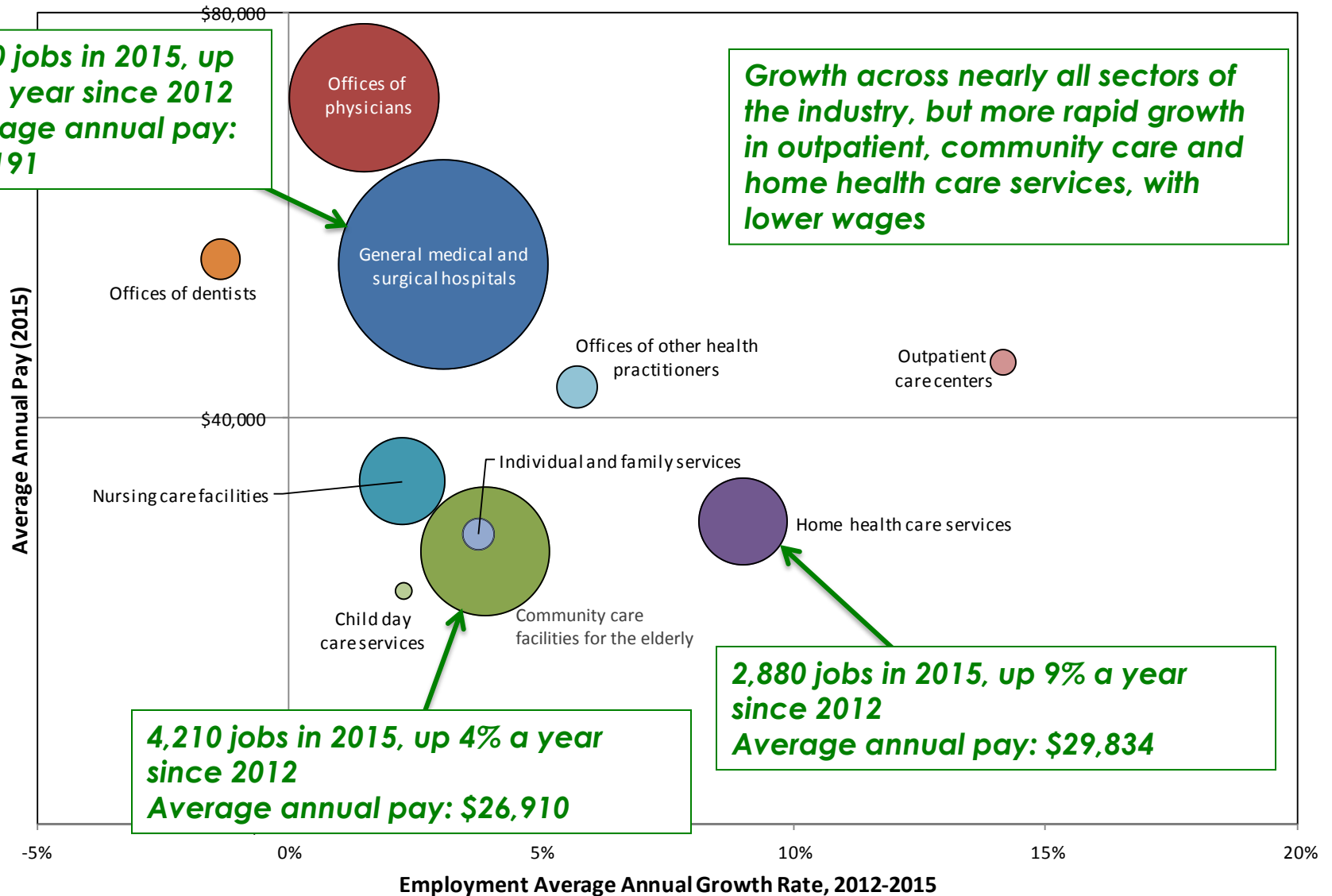


ANALYSIS OF SUB-SECTORS

Health Care

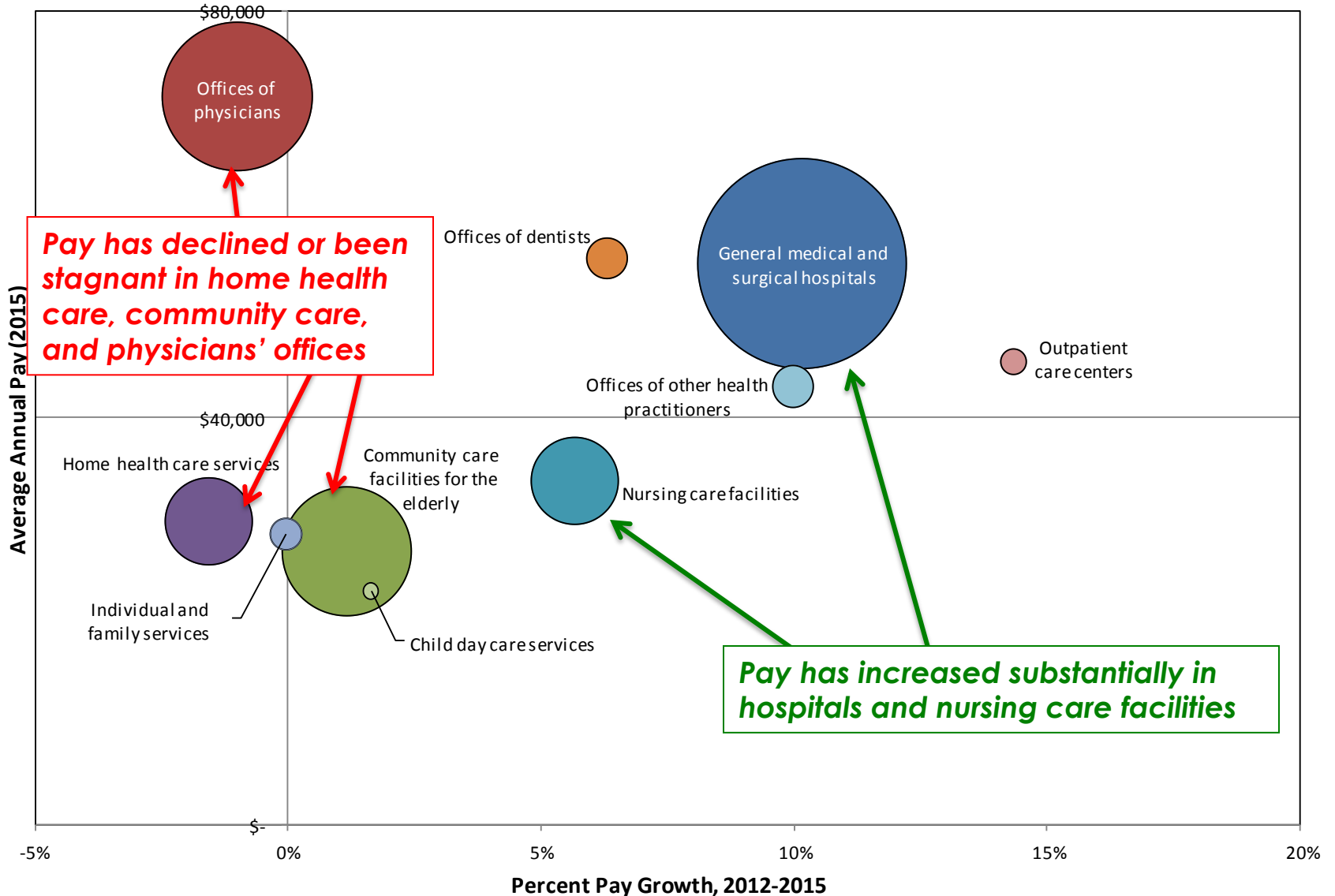
FLORIDA: SARASOTA COUNTY

Annual Average Pay, Size, and Growth, Health and Social Assistance



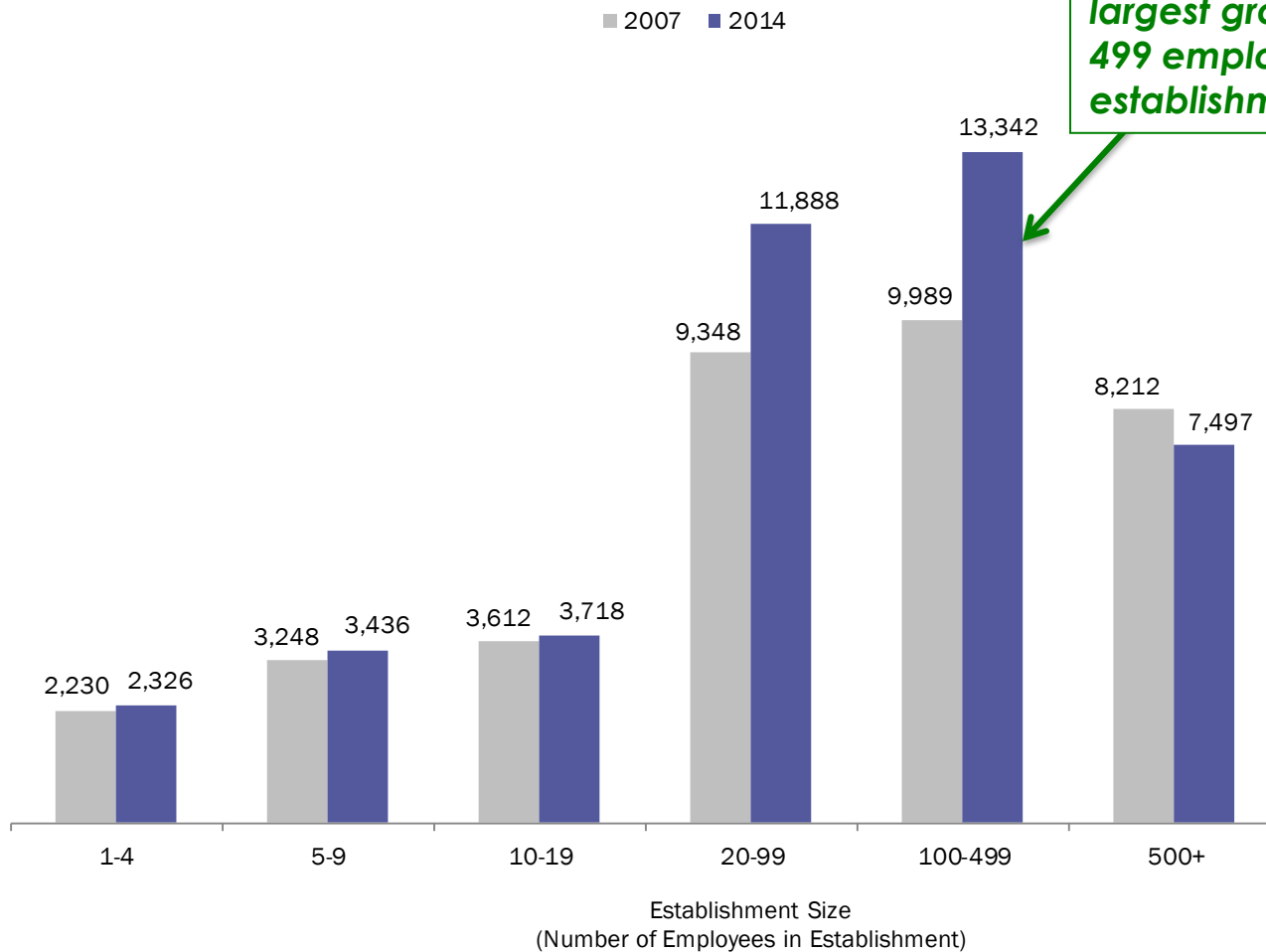
FLORIDA: SARASOTA COUNTY

Pay Growth, Size, and Average Pay, Health and Social Assistance



NORTH PORT-SARASOTA REGION: HEALTH CARE & SOCIAL ASSISTANCE

North Port-Sarasota-Bradenton Region
Total Employment by Establishment Size Category
Health Care & Social Assistance Industry
(2007, 2014)



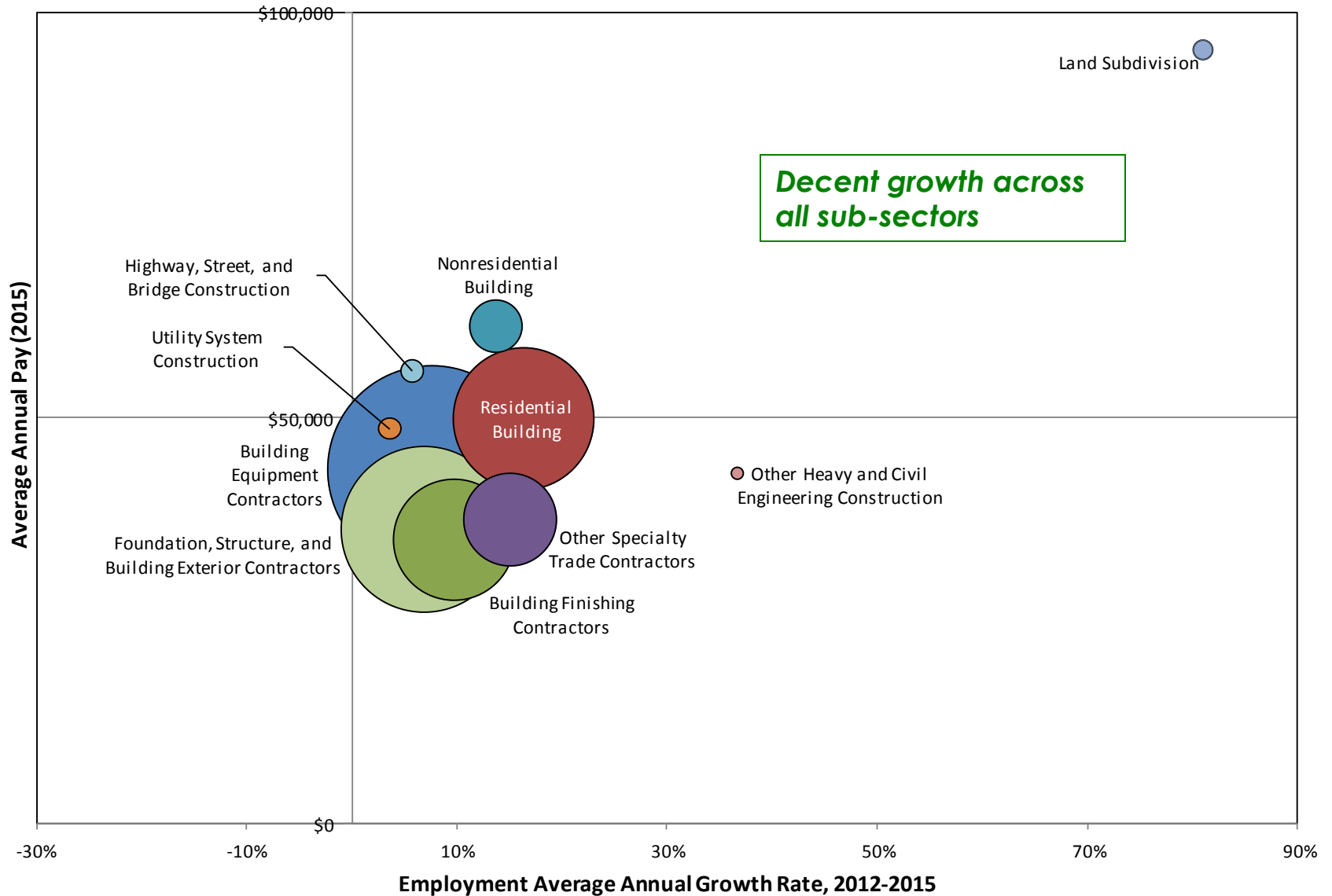
Jobs are mostly in mid-to large-size establishments, with largest growth in 100-499 employee establishments

ANALYSIS OF SUB-SECTORS

Construction

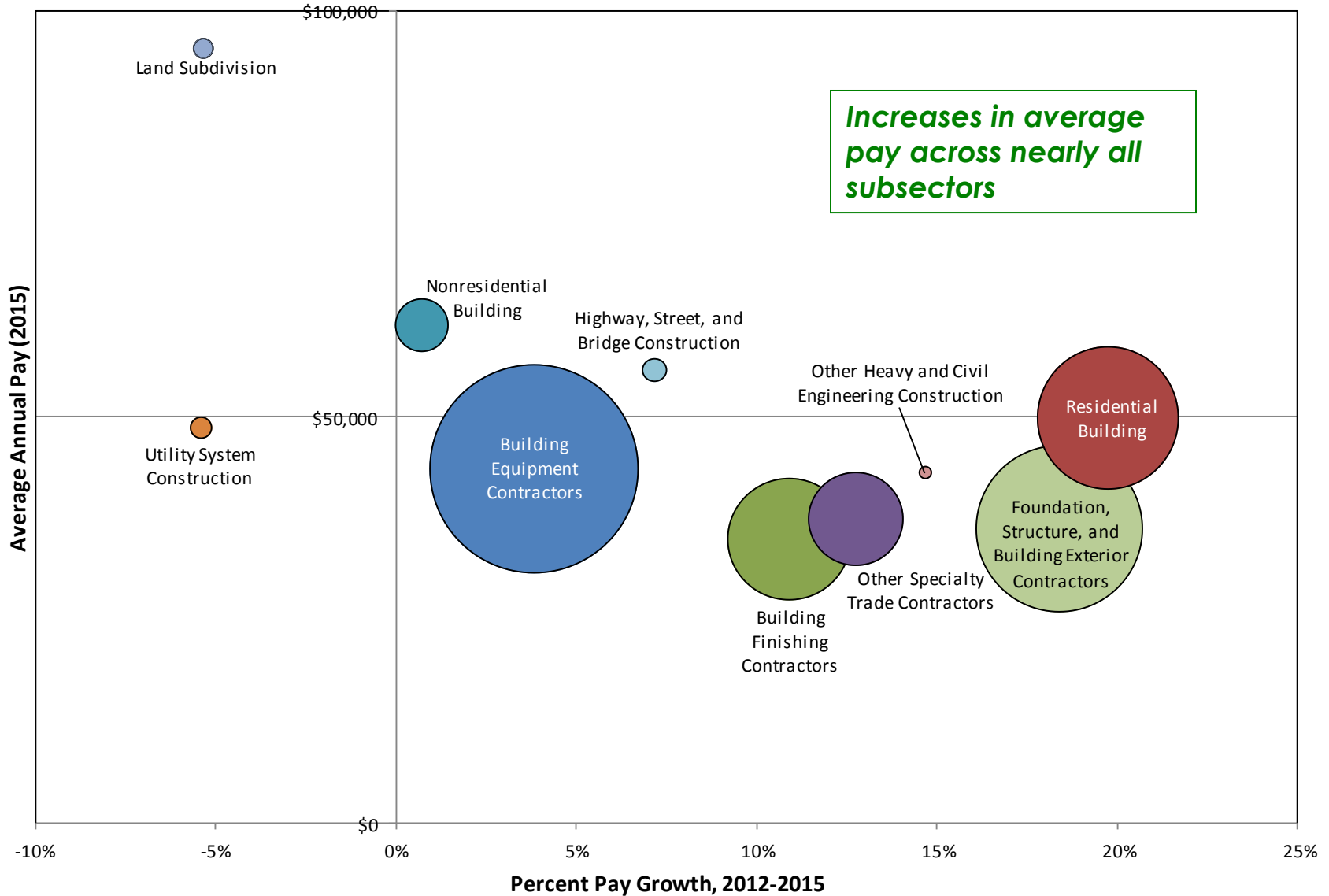
FLORIDA: SARASOTA COUNTY

Annual Average Pay, Size, and Growth, Construction



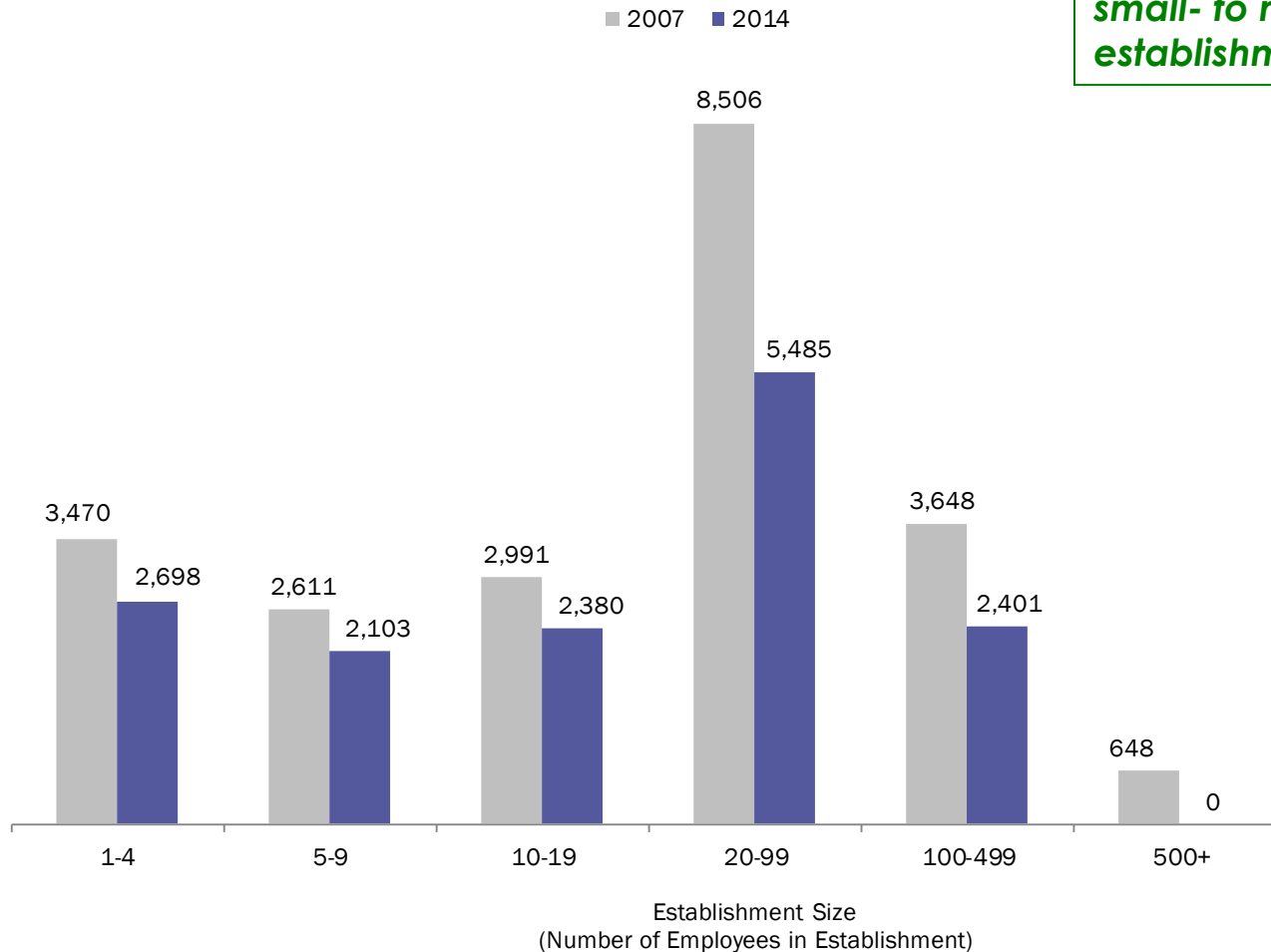
FLORIDA: SARASOTA COUNTY

Pay Growth, Size, and Average Pay, Construction



NORTH PORT-SARASOTA REGION: CONSTRUCTION

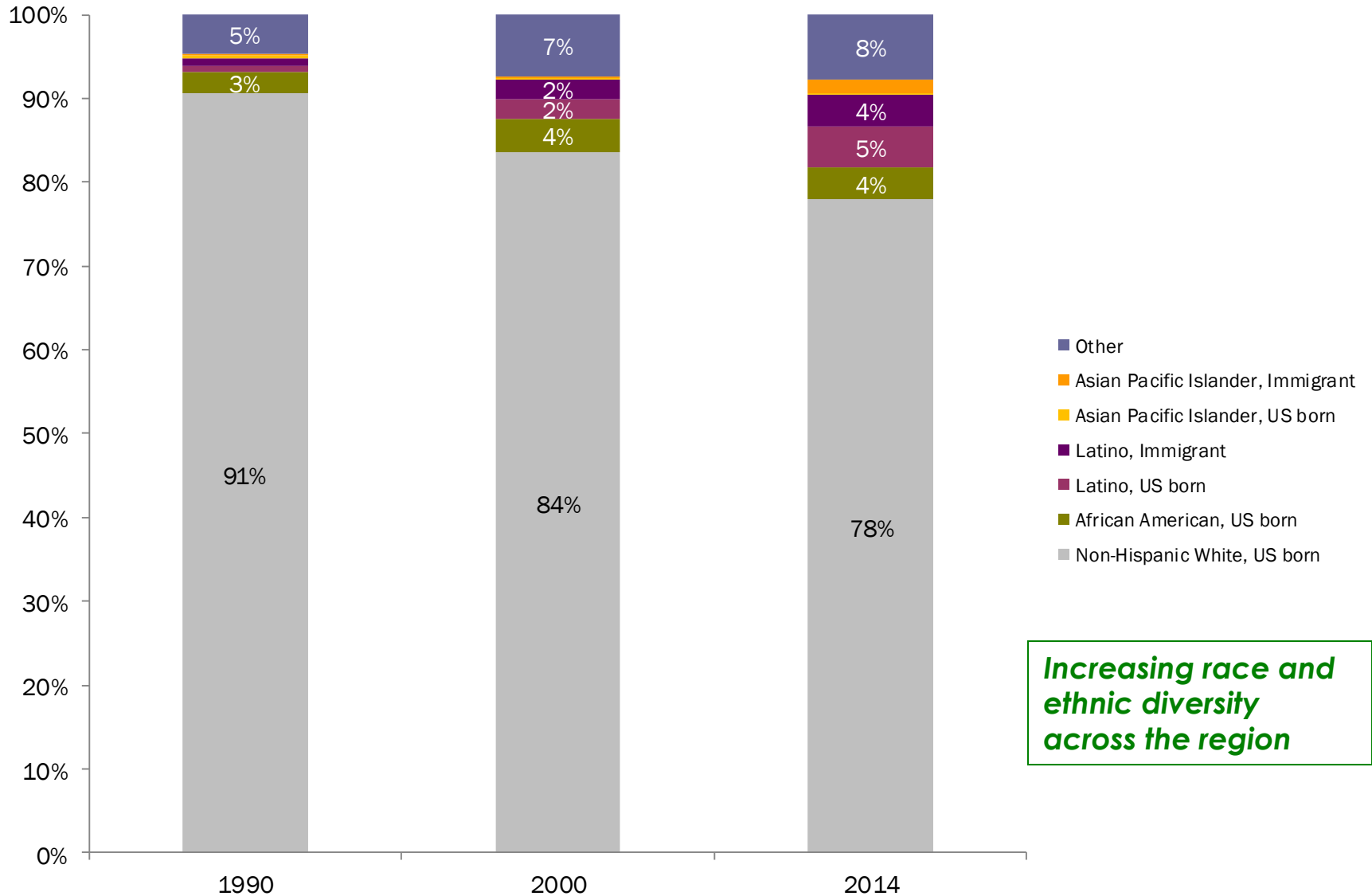
North Port-Sarasota-Bradenton Region
Total Employment by Establishment Size Category
Construction Industry
(2007, 2014)



Jobs are mostly in small- to mid-size establishments

FLORIDA: SARASOTA COUNTY

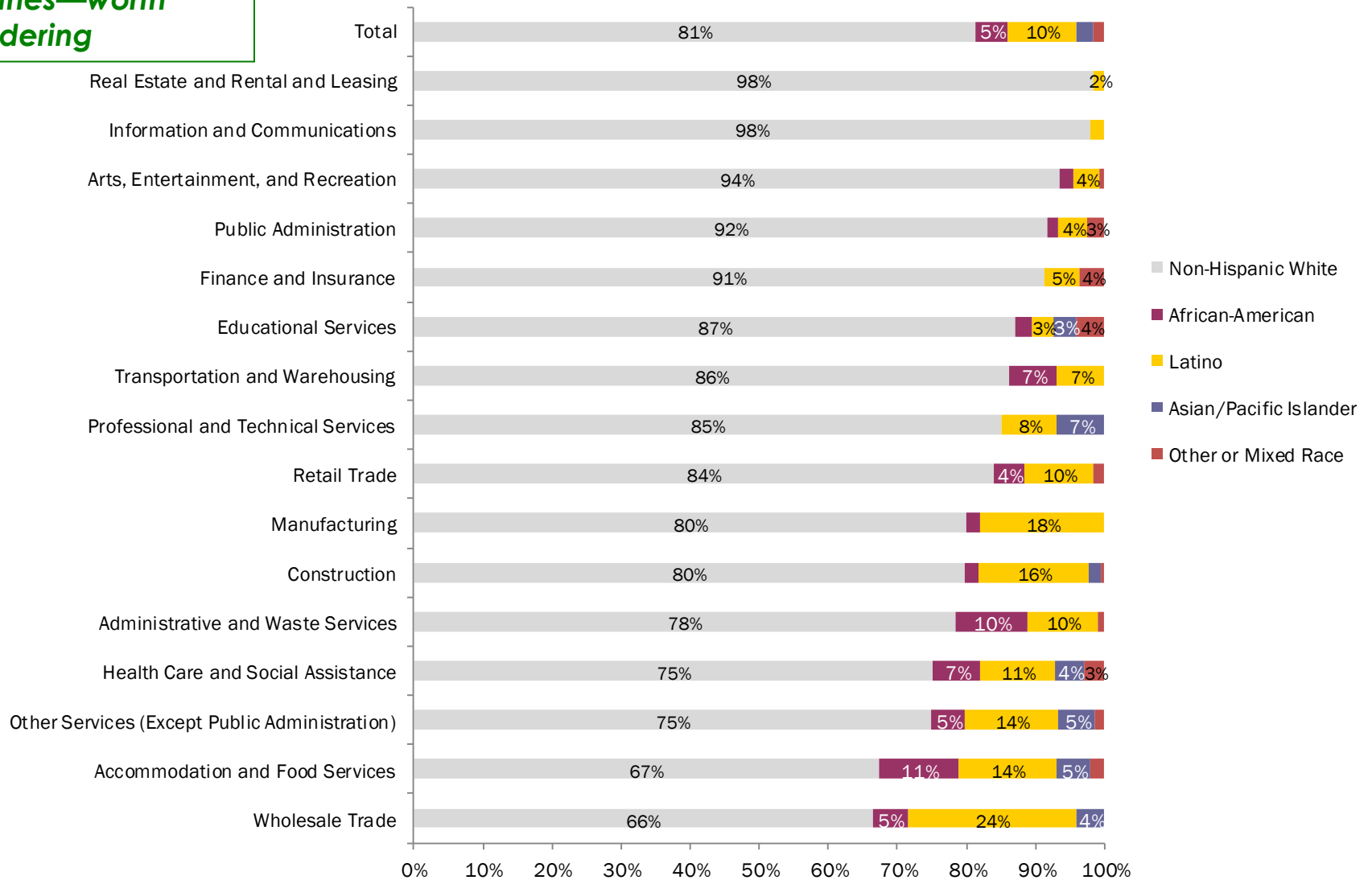
Sarasota County Population by Race/Ethnicity
(1990, 2000, 2014)



FLORIDA: SARASOTA COUNTY

Employment by race differs substantially across different industries—worth considering

Sarasota County
Industry Employment by Race
(2014)



Concluding Points

- Data analysis can be complement to, not substitute for, more in-depth local analysis
- Most promising economic growth potential:
 - Manufacturing
 - Esp. fabricated metal products & transportation equipment
 - More growth in Sarasota and Hillsborough counties
 - Professional and technical services
 - Computer systems design, technical consulting
 - Not so much software
 - Hillsborough County has largest concentration, though dominated by large (500+ enterprises)
 - Sarasota has more medium-sized establishments and enterprises
- Continued employment opportunities in health care and construction

Concluding Points

- Career ladders exist in all studied sectors
 - Most have entry-level positions that don't require advanced training, certifications or degrees, though some may require certification/degree for advancement
 - Professional and technical services typically requires minimum of vocational education certificate for ground-floor
 - One challenge in health sector is the growth of home health care and community health centers, which have lower wages. Building stronger career steps to hospital sector would be beneficial
- Overall average payrolls across all sectors have been rising since 2012—good sign!