
Sarasota-Bradenton Regional Labor Market Update and Context

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Summary

- Recent resurgence in certain industries, including :
 - Manufacturing (fabricated metal, plastics)
 - Construction
 - In Manatee County: rapid percent growth in transportation & warehousing
- Continued opportunities in health care and professional/technical services
- Major challenge of declining earnings
- Career ladders exist in all studied sectors, but educational requirements and certification opportunities vary

Outline of presentation

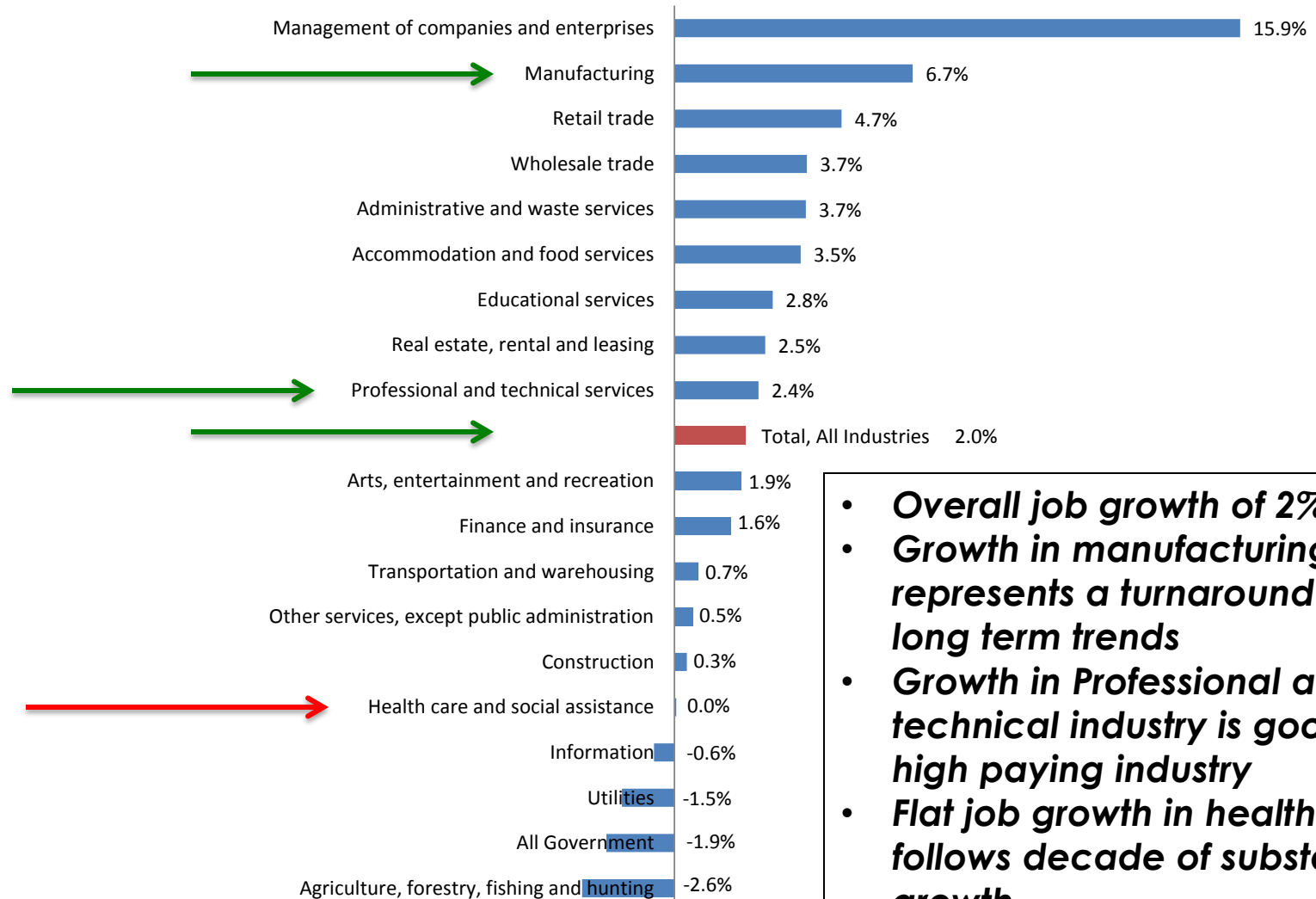
- Data sources and full analysis content
- Highlights of analysis of recent labor market trends
 - Industry analysis
 - Employment by size
 - Career ladders
- Summary of potential opportunities

Data Analysis

- 2-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
 - Information and Professional & Technical Services
 - Transportation & Warehousing
 - Construction
- Employment by employer-size analysis
 - By industry sub-sector
- Analysis of occupations
 - Occupational career ladders by industry sub-sector

Employment Change 2010-2012

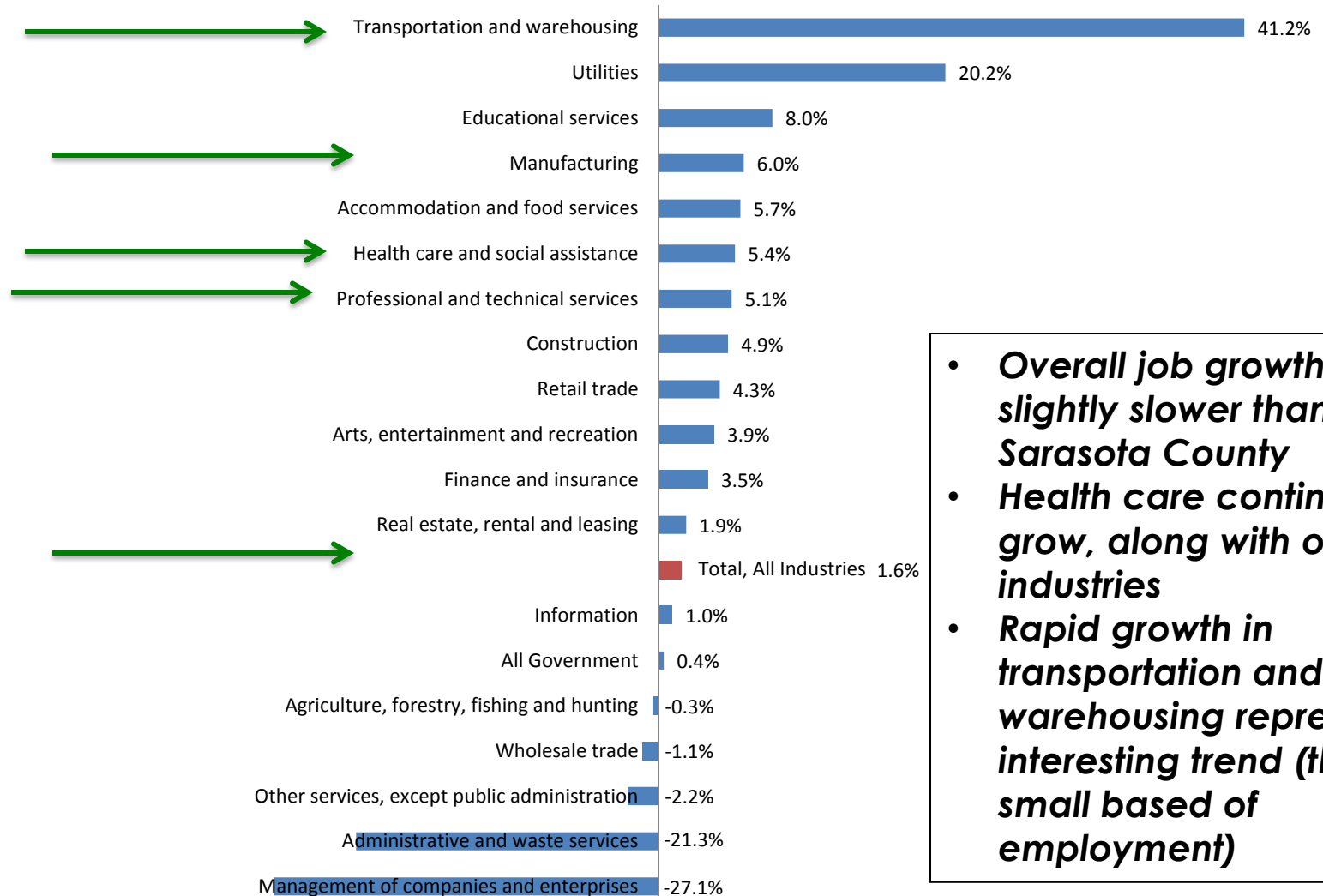
Annual Average Growth Rate



- **Overall job growth of 2% year**
- **Growth in manufacturing represents a turnaround from long term trends**
- **Growth in Professional and technical industry is good—high paying industry**
- **Flat job growth in health care follows decade of substantial growth**

Employment Change 2010-2012

Annual Average Growth Rate

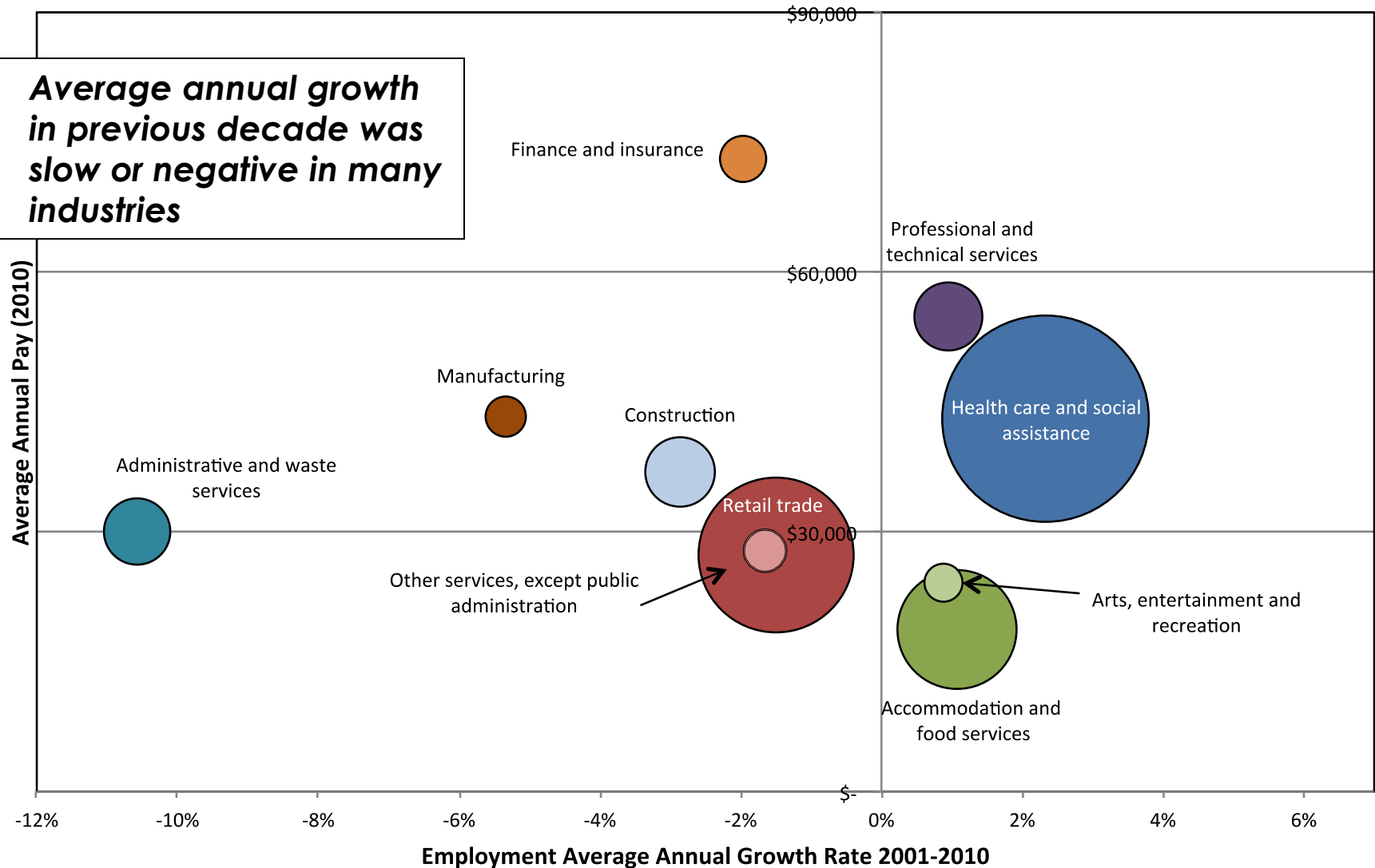


- **Overall job growth slightly slower than Sarasota County**
- **Health care continues to grow, along with other industries**
- **Rapid growth in transportation and warehousing represents interesting trend (though small based of employment)**

FLORIDA: SARASOTA COUNTY, 2001-2010

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

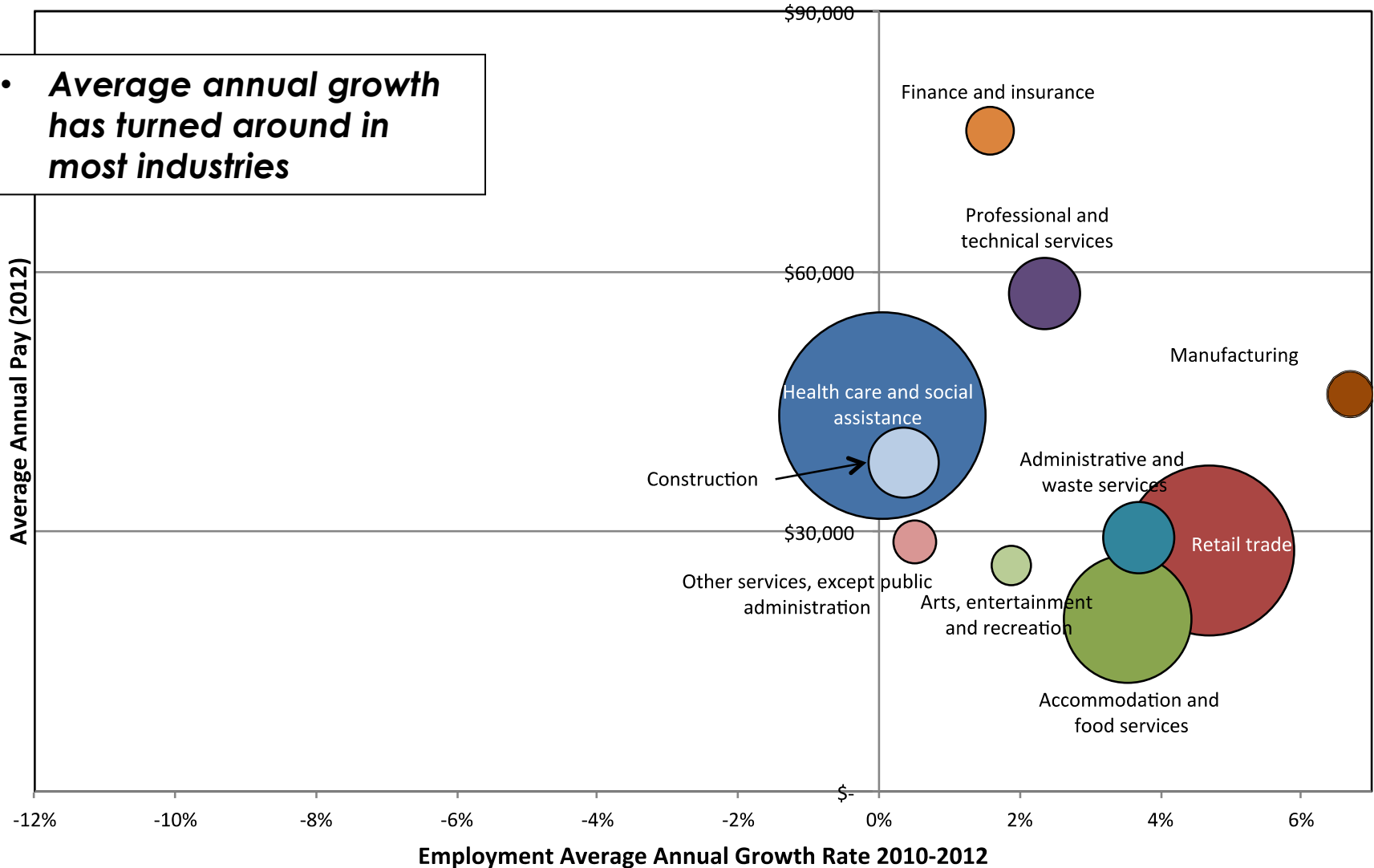
- **Average annual growth in previous decade was slow or negative in many industries**



FLORIDA: SARASOTA COUNTY, 2010-2012

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

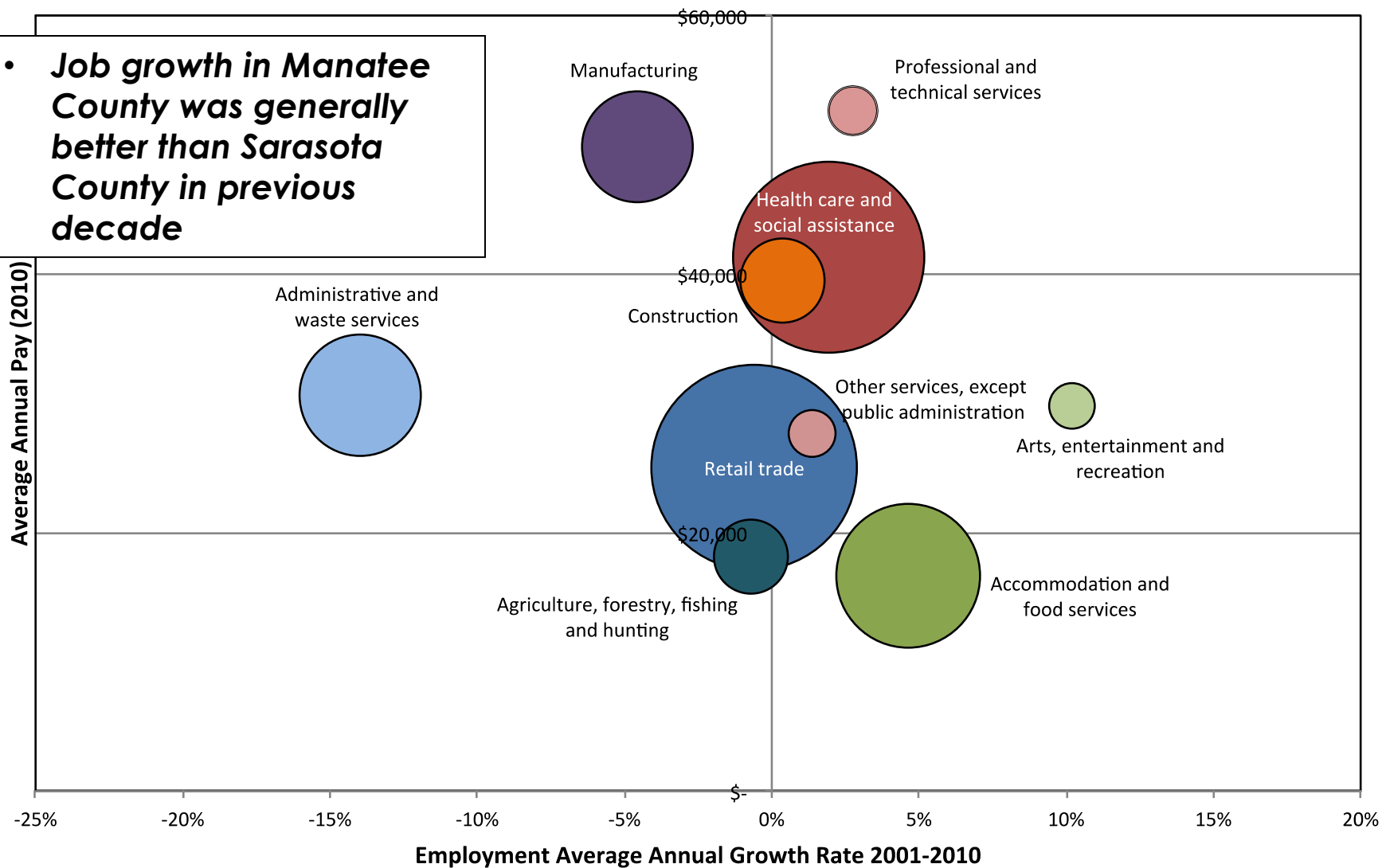
- **Average annual growth has turned around in most industries**



FLORIDA: MANATEE COUNTY, 2001-2010

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

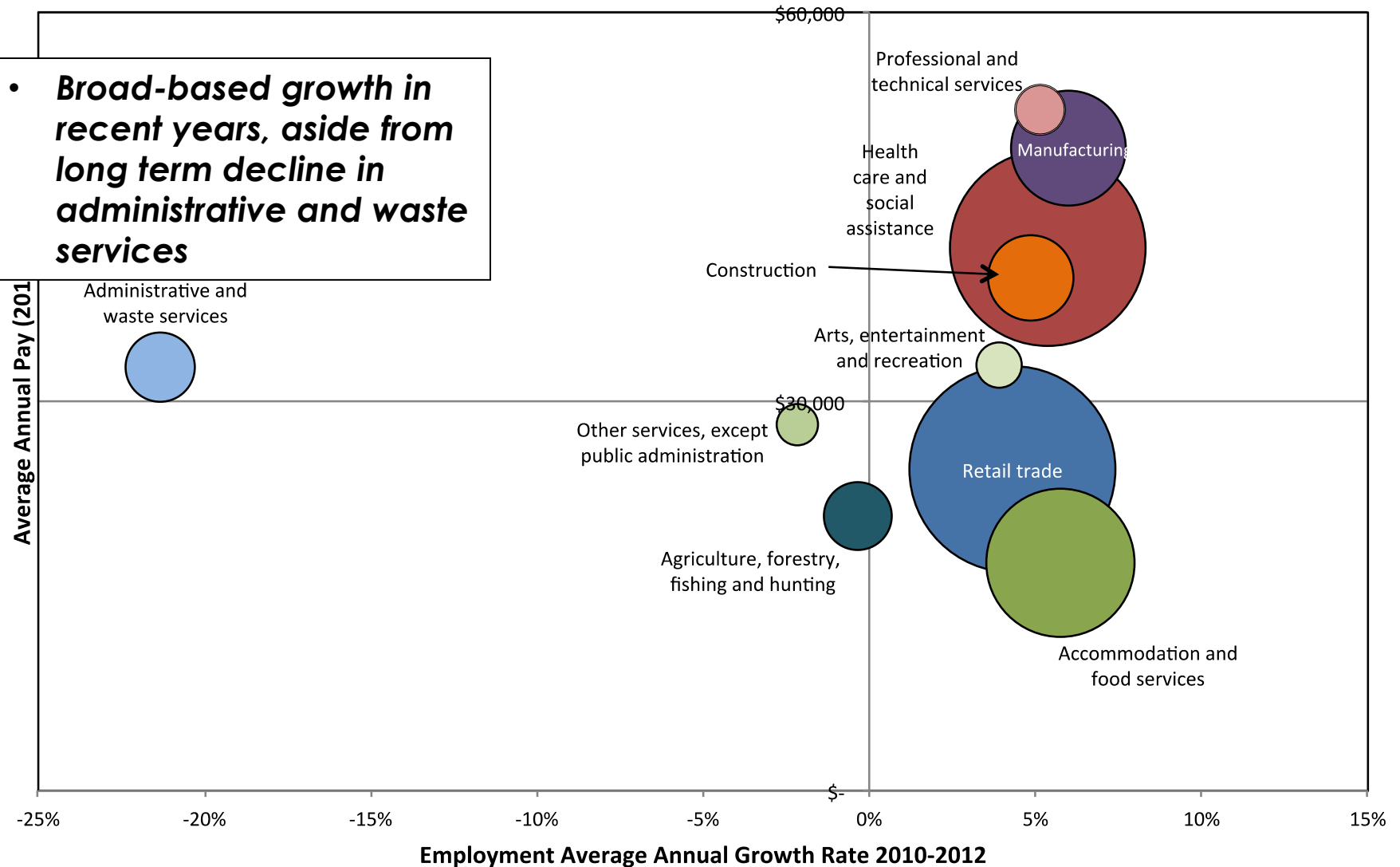
- **Job growth in Manatee County was generally better than Sarasota County in previous decade**



FLORIDA: MANATEE COUNTY, 2010-2012

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

- Broad-based growth in recent years, aside from long term decline in administrative and waste services**



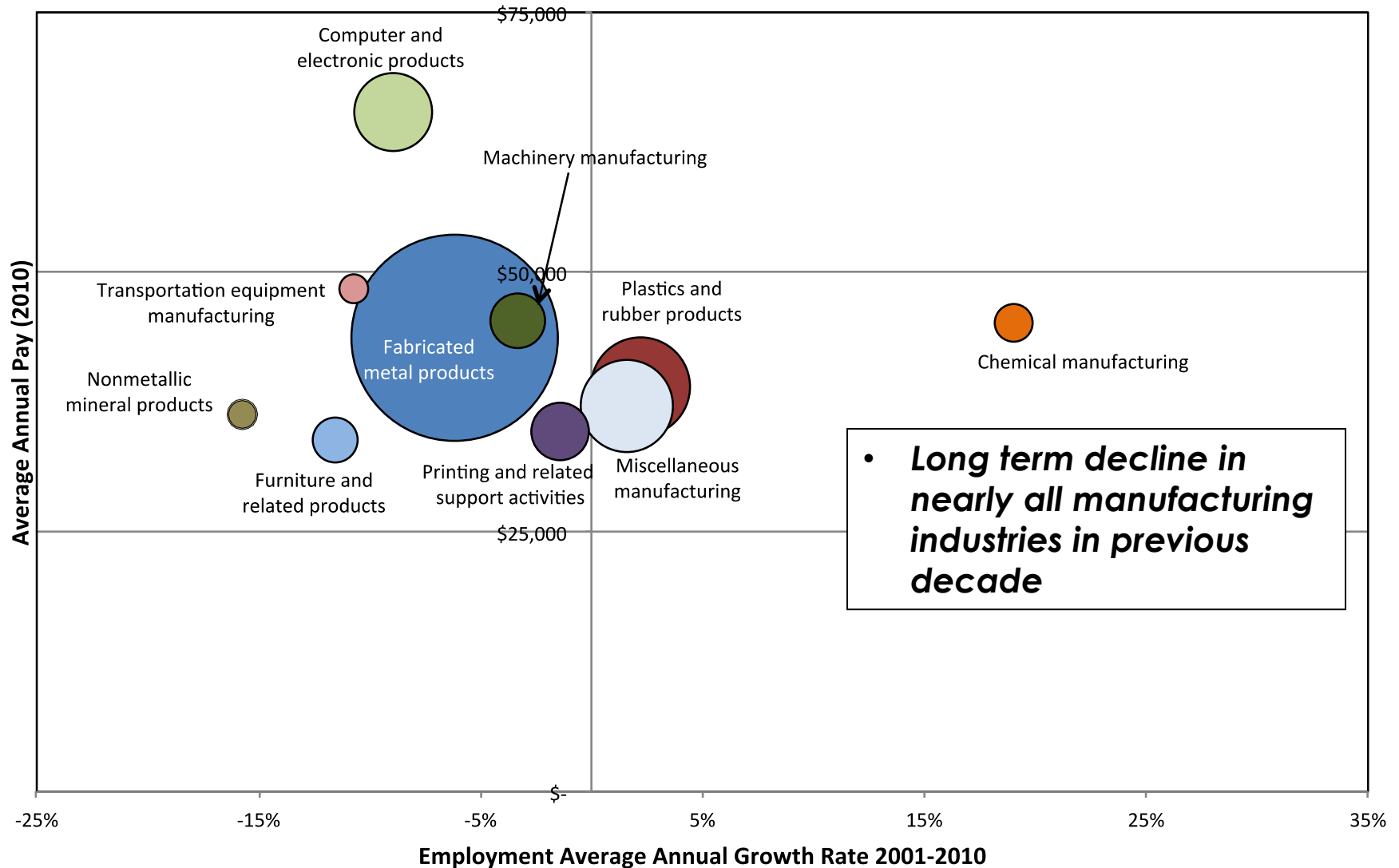
FLORIDA:

ANALYSIS OF SUB-SECTORS

Manufacturing

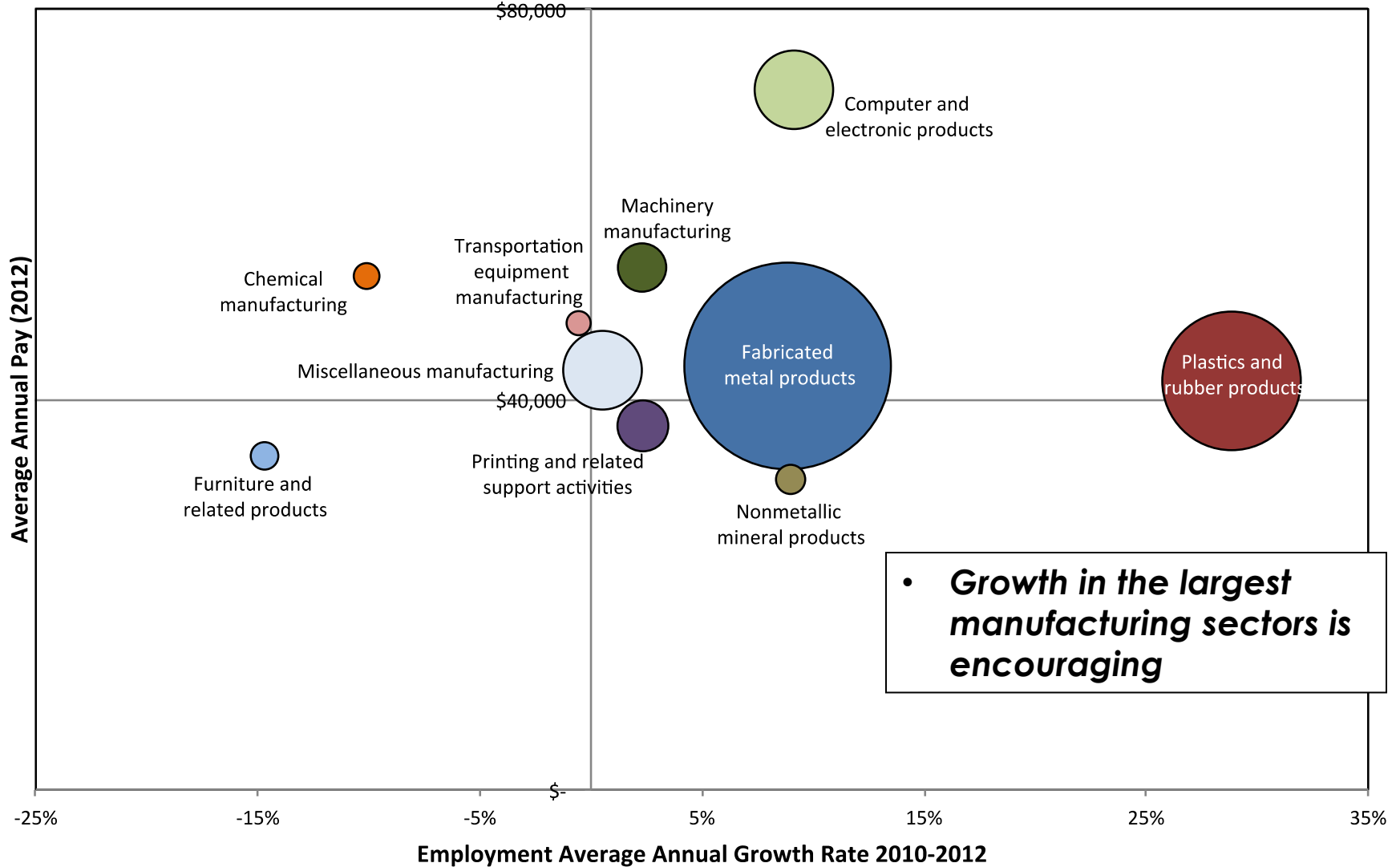
FLORIDA: SARASOTA COUNTY, 2001-2010

Annual Average Pay, Size, and Growth, Manufacturing



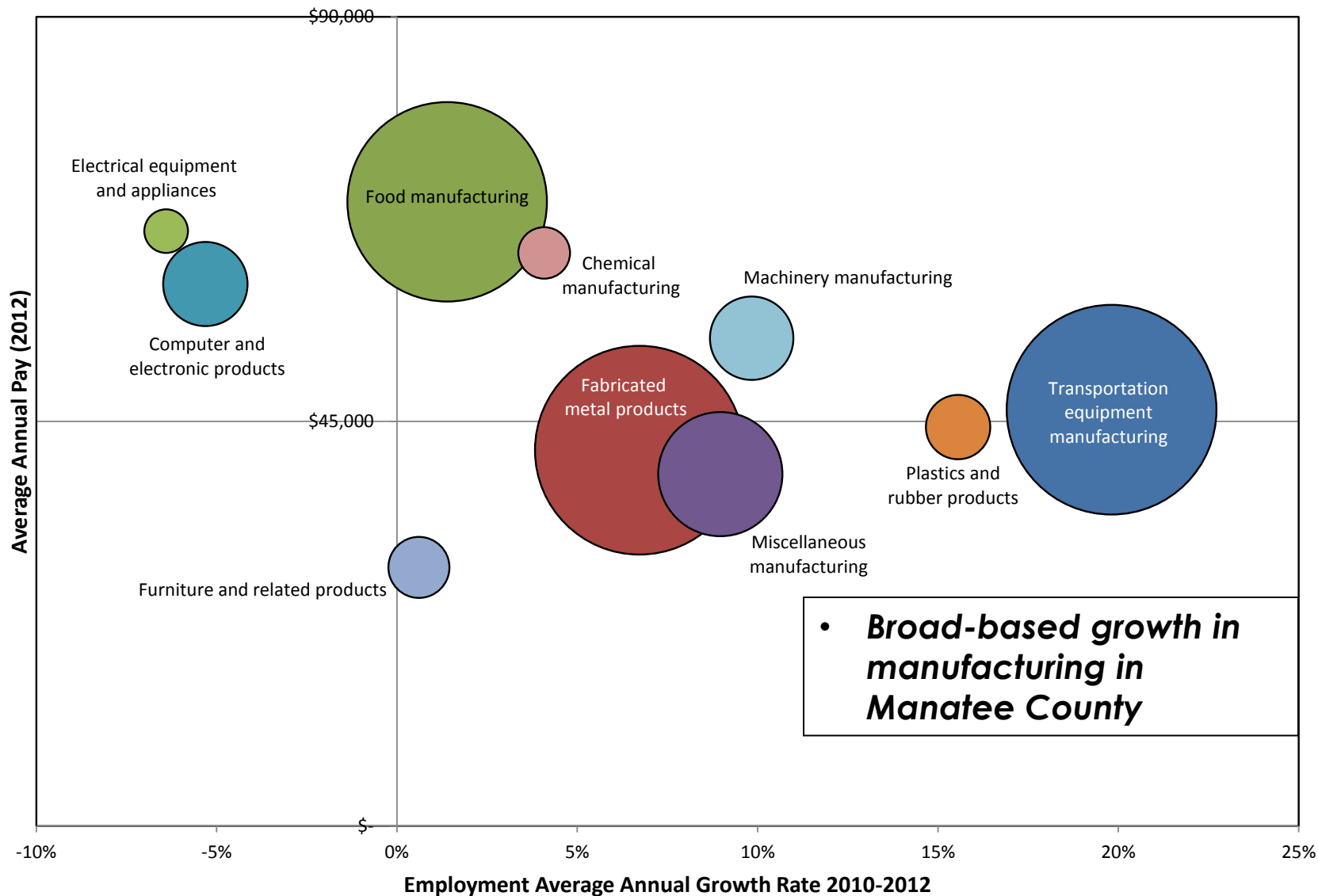
FLORIDA: SARASOTA COUNTY, 2010-2012

Annual Average Pay, Size, and Growth, Manufacturing



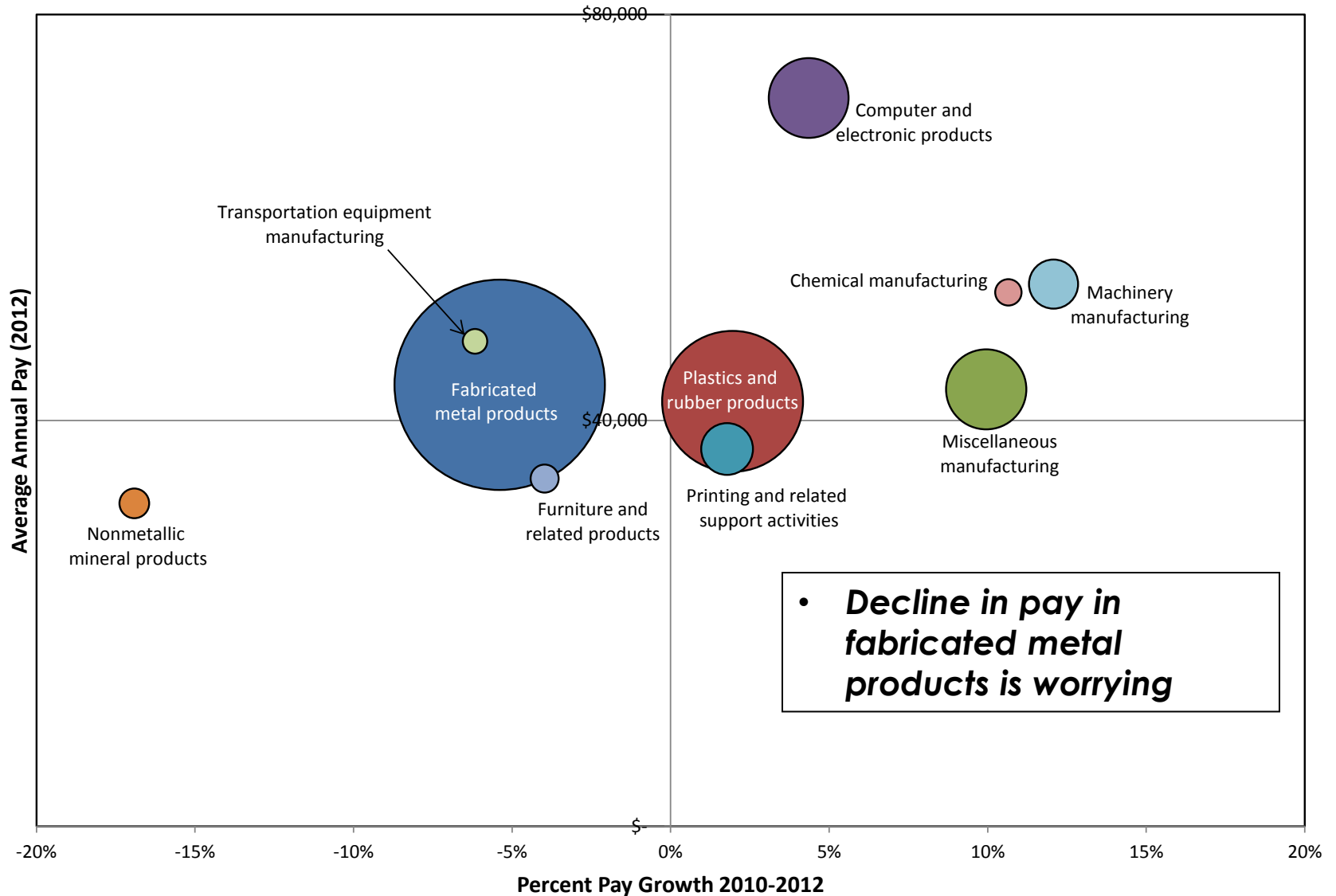
FLORIDA: MANATEE COUNTY, 2010-2012

Annual Average Pay, Size, and Growth, Manufacturing



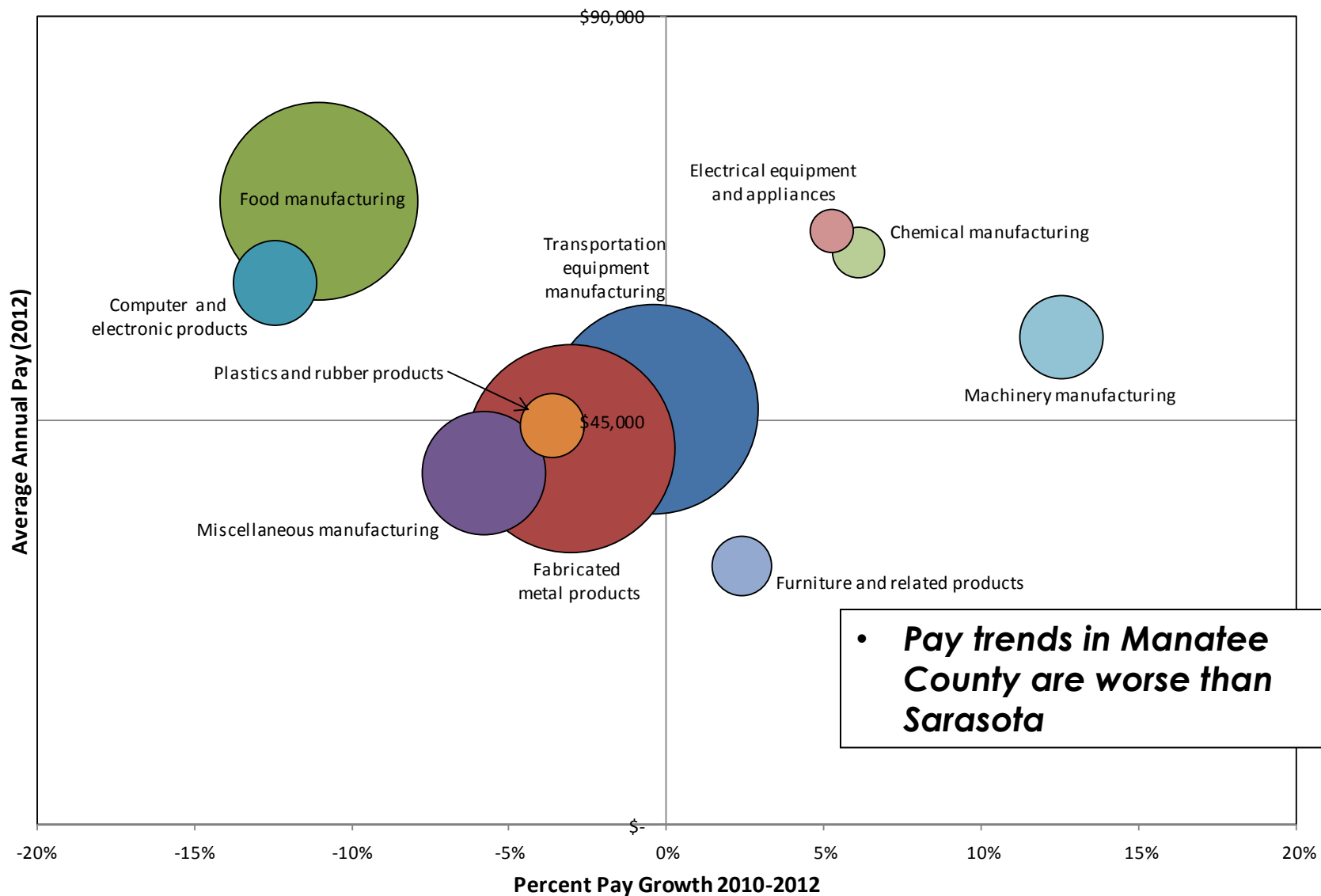
FLORIDA: SARASOTA COUNTY, 2010-2012

Pay Growth, Size, and Average Pay, Manufacturing



FLORIDA: MANATEE COUNTY, 2010-12

Pay Growth, Size, and Average Pay, Manufacturing



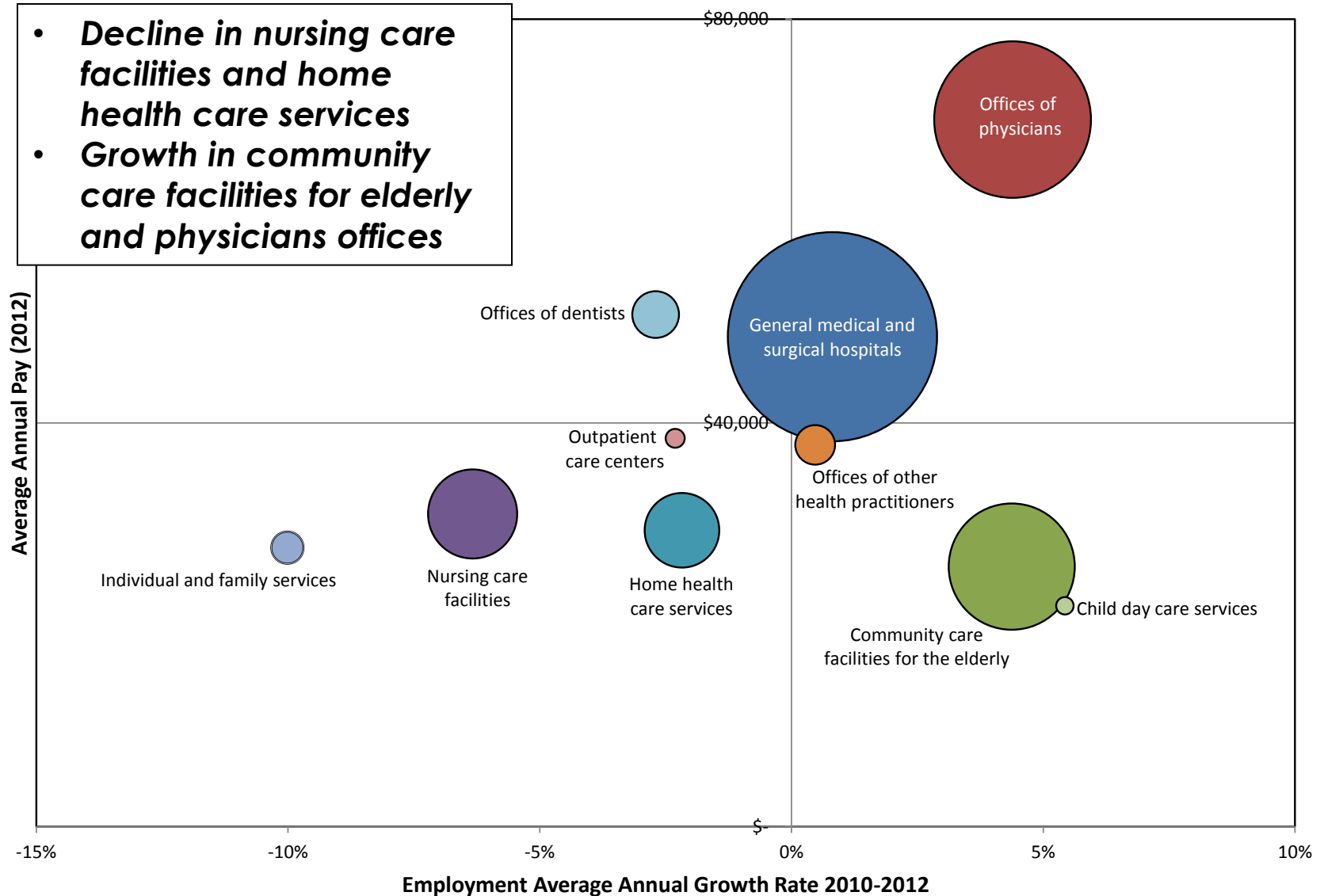
FLORIDA:

ANALYSIS OF SUB-SECTORS

Health Care

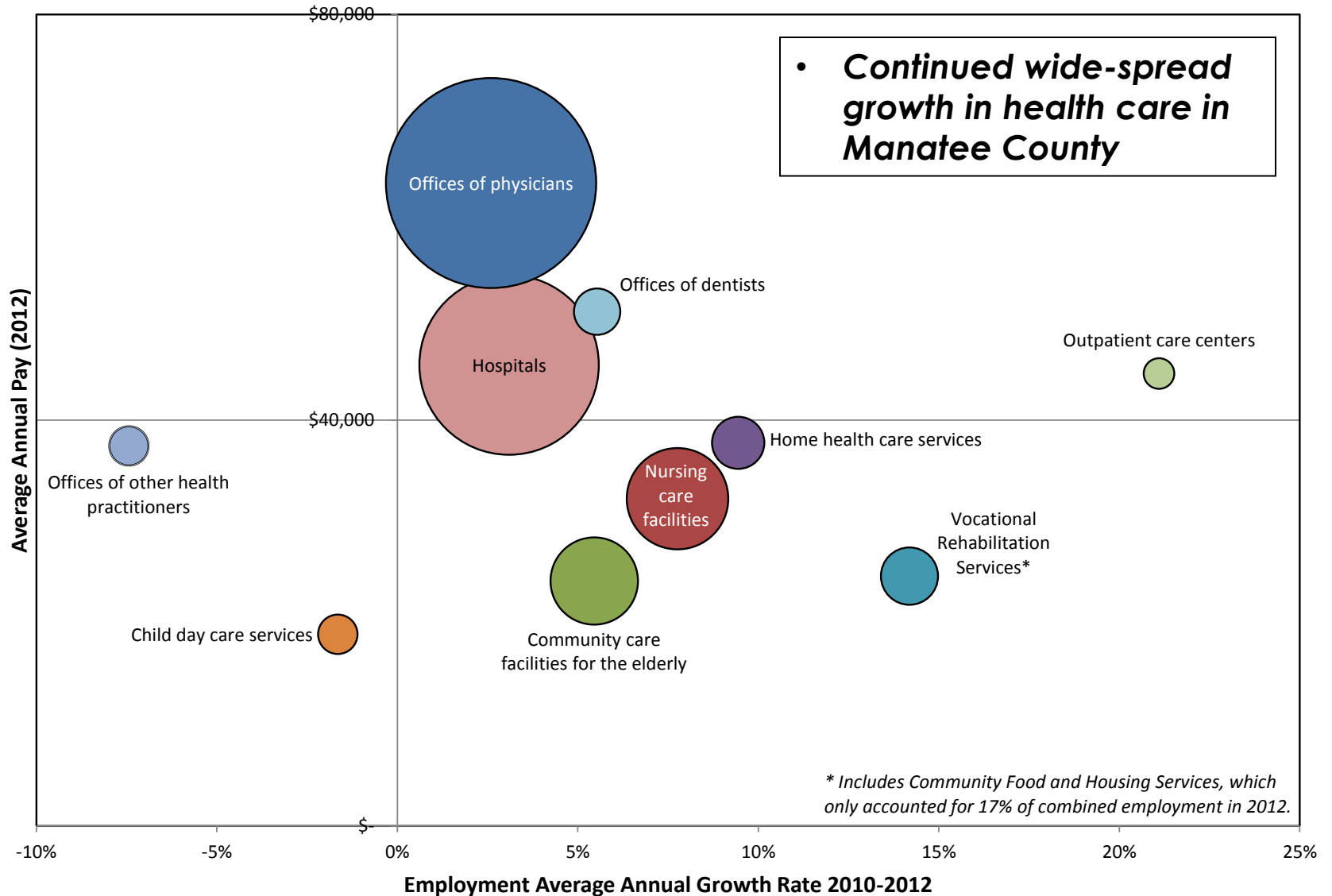
FLORIDA: SARASOTA COUNTY, 2010-2012

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



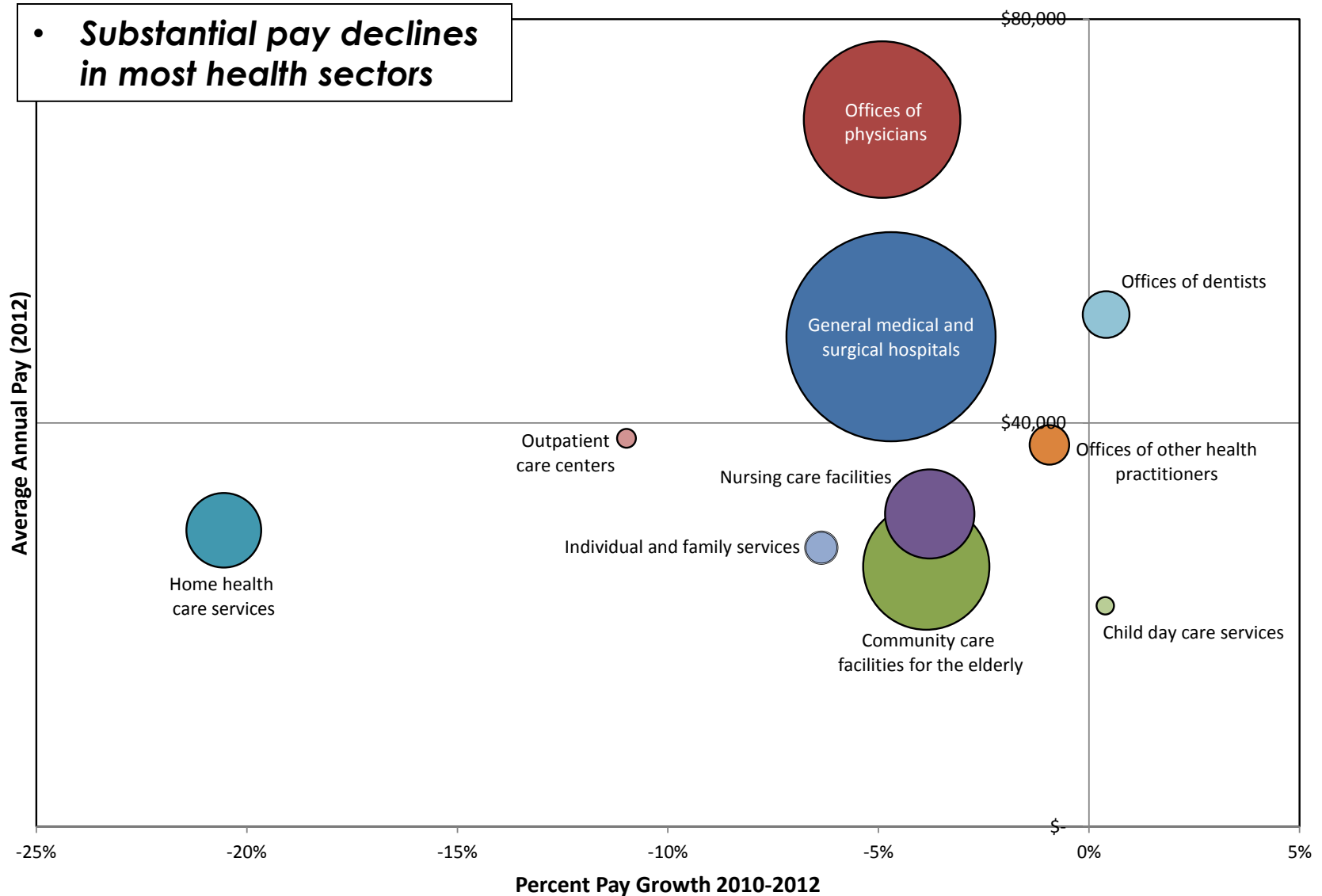
FLORIDA: MANATEE COUNTY, 2010-2012

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



FLORIDA: SARASOTA COUNTY, 2010-2012

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

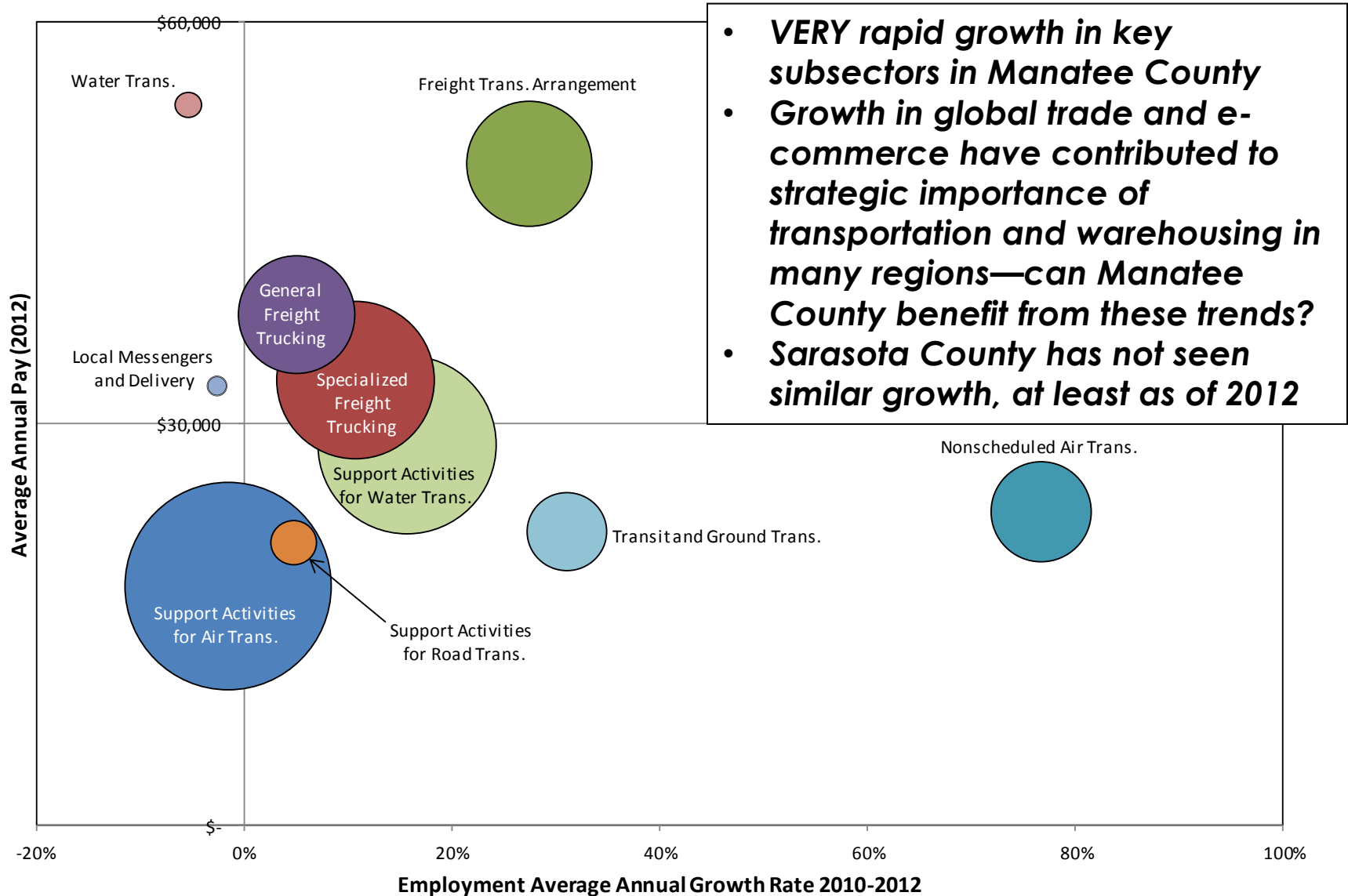


ANALYSIS OF SUB-SECTORS

Transportation & Warehousing

FLORIDA: MANATEE COUNTY, 2010-2012

Annual Average Pay, Size, and Growth, Transportation & Warehousing

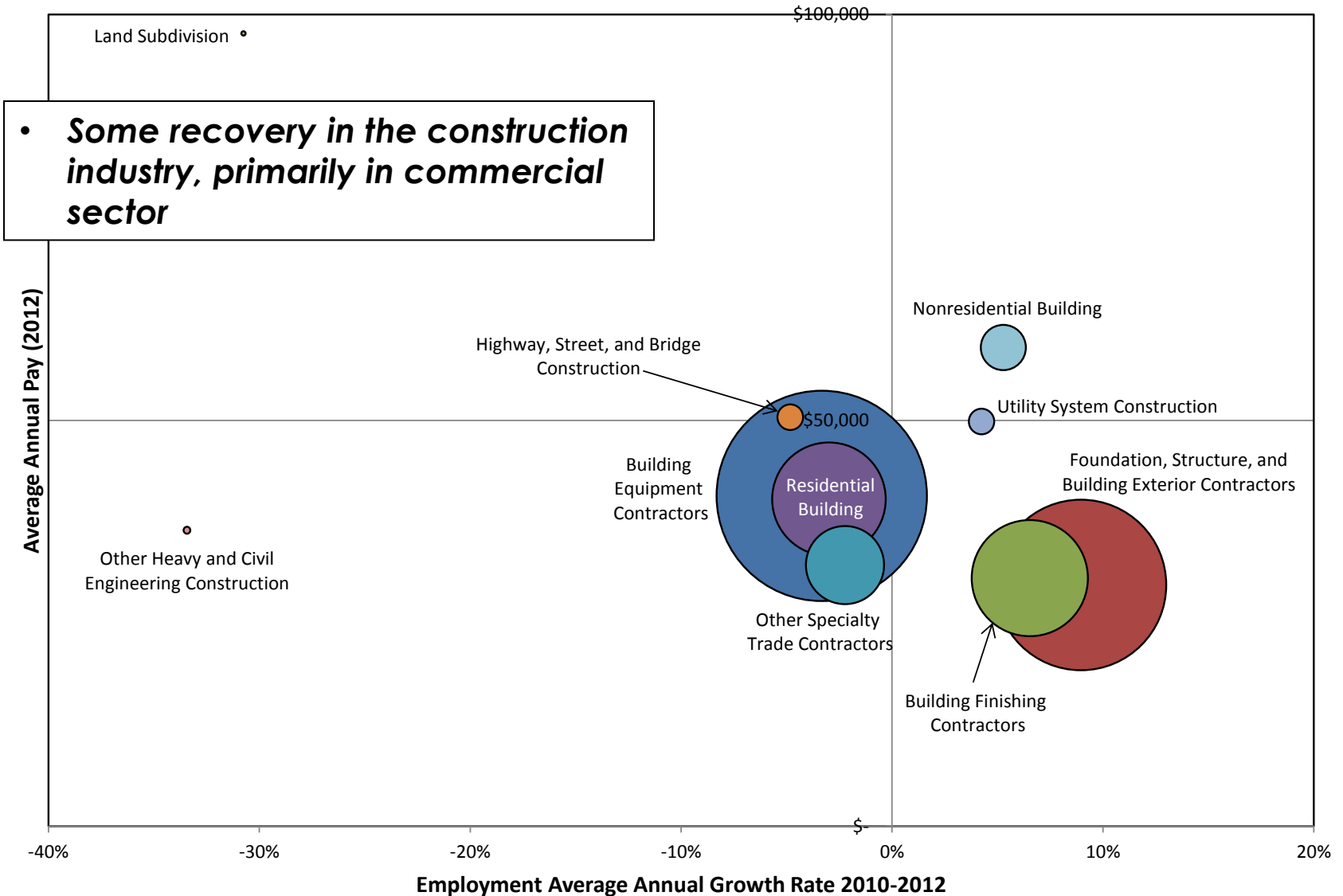


ANALYSIS OF SUB-SECTORS

Construction

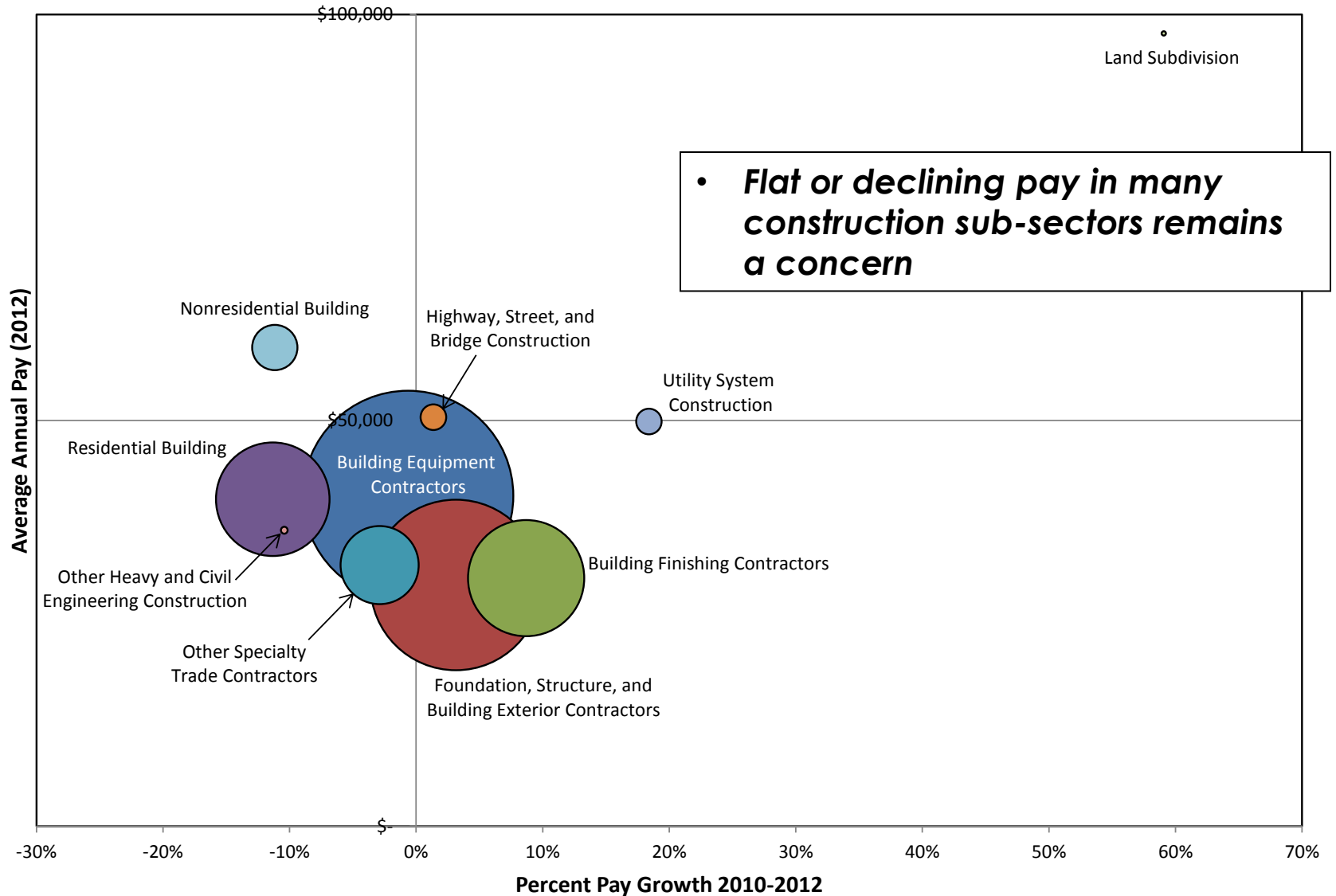
FLORIDA: SARASOTA COUNTY

Annual Average Pay, Size, and Growth, Construction



FLORIDA: SARASOTA COUNTY

Pay Growth, Size, and Average Pay, Construction



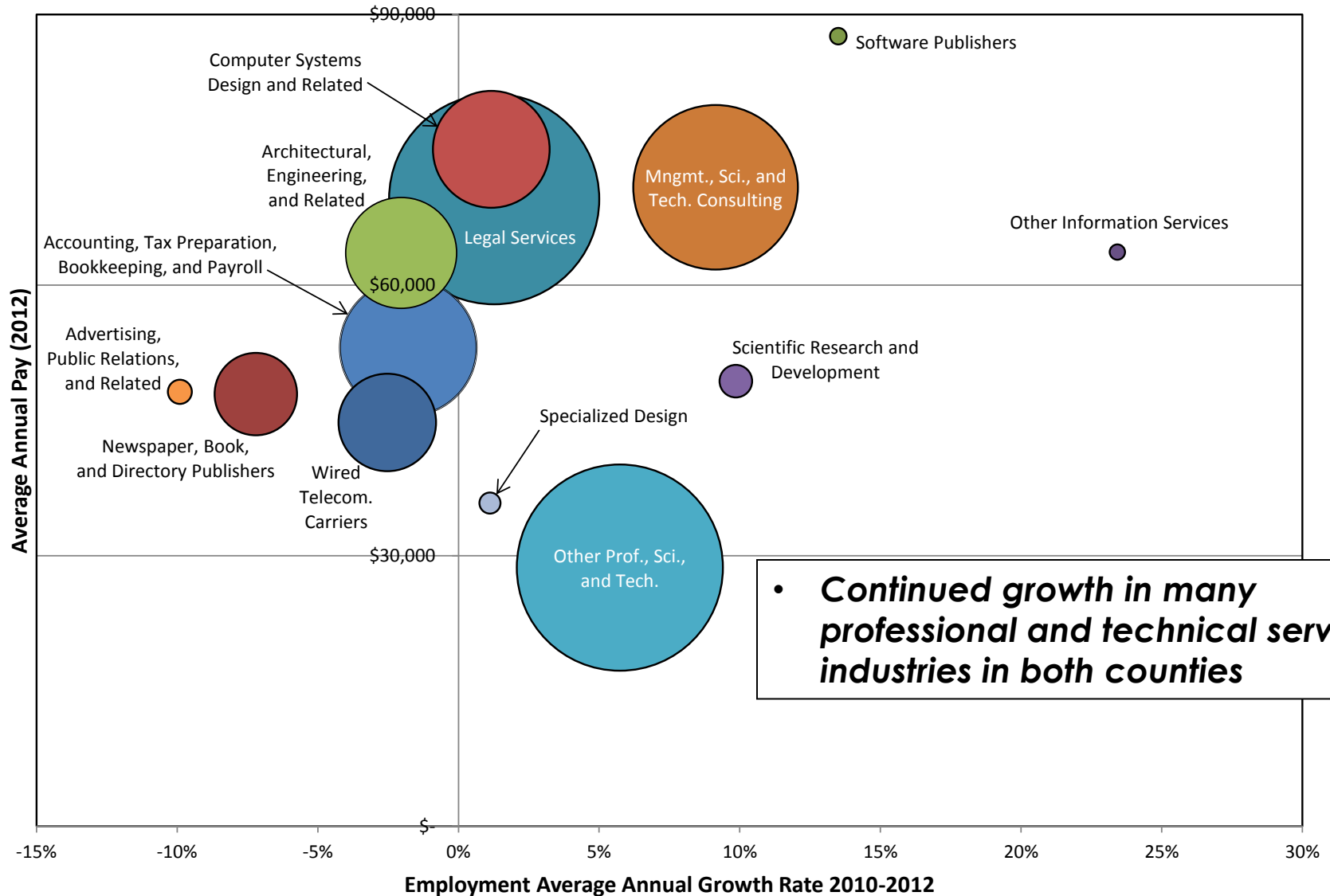
FLORIDA:

ANALYSIS OF SUB-SECTORS

Information and
Professional & Technical Services

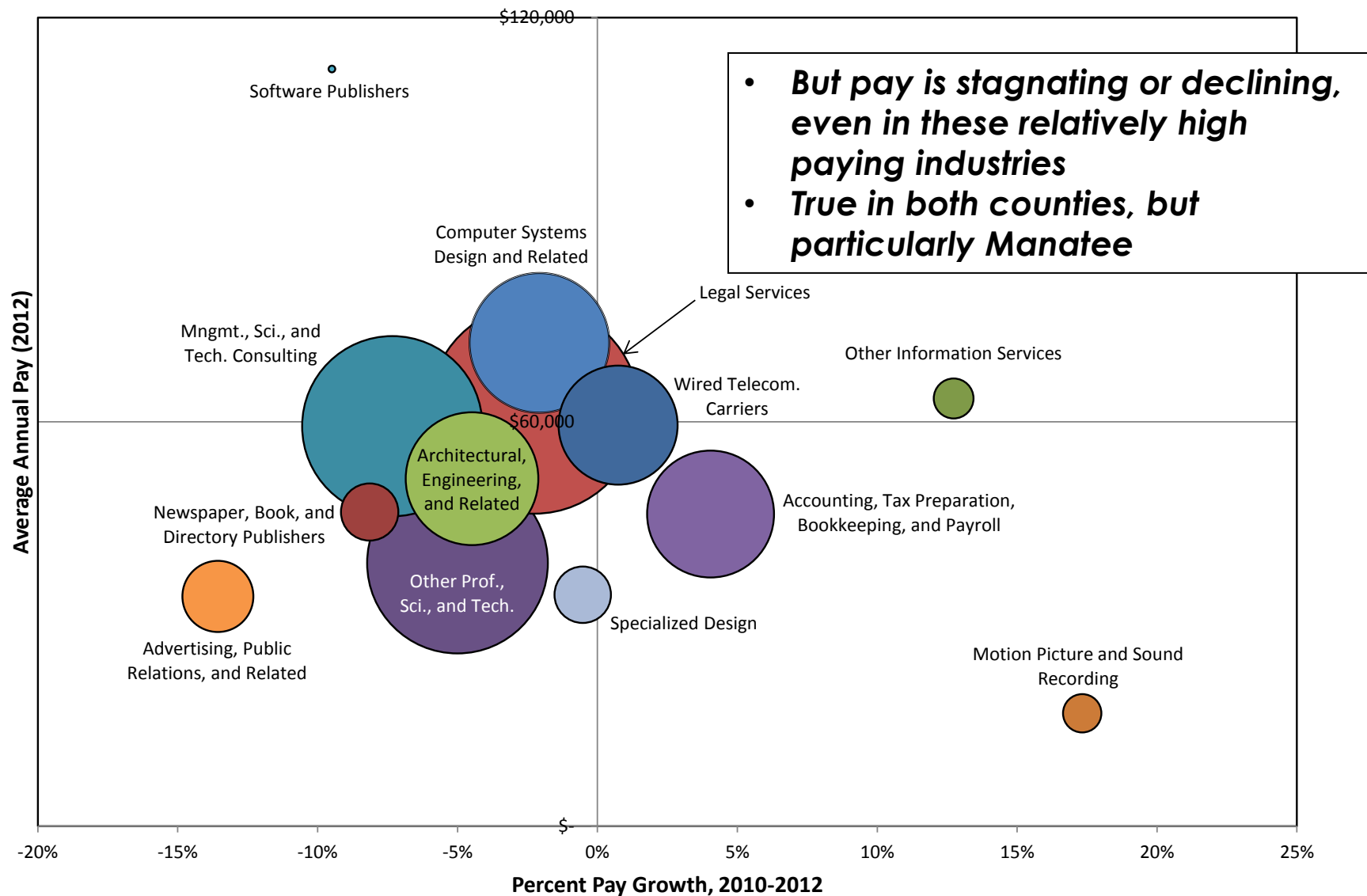
FLORIDA: SARASOTA COUNTY, 2010-12

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



FLORIDA: MANATEE COUNTY, 2010-2012

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



EMPLOYMENT BY EMPLOYER SIZE

All Industries

Employment by Size-Key Points

- Levels of concentration of employment help identify potential strategic interventions
- Health care
 - 4 companies employ more than 7,500 people, but also significant employment in mid-size firms.
- Manufacturing
 - Employment in mostly mid-size firms
 - 2 firms with over 500 employees
- Transportation & Warehousing
 - 1 new large company with over 750 employees
 - Is this linked with Port Manatee?

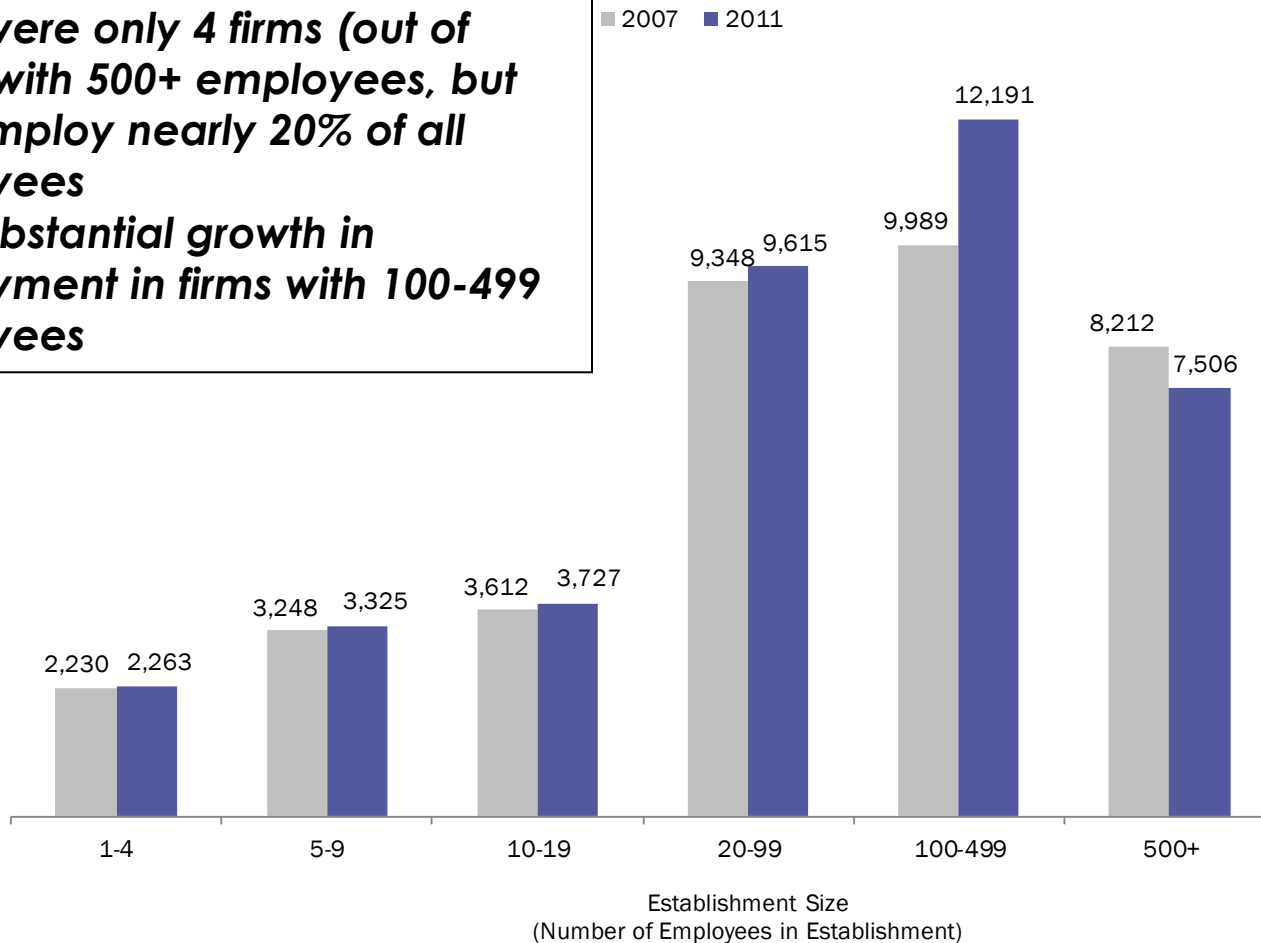
EMPLOYMENT BY EMPLOYER SIZE

Health Care

SARASOTA-BRADENTON: HEALTH CARE & SOCIAL ASSISTANCE

Sarasota-Bradenton Region
Total Employment by Establishment Size Category
Health Care & Social Assistance Industry
(2007, 2011)

- ***There were only 4 firms (out of 2,346) with 500+ employees, but they employ nearly 20% of all employees***
- ***Also substantial growth in employment in firms with 100-499 employees***



EMPLOYMENT BY EMPLOYER SIZE

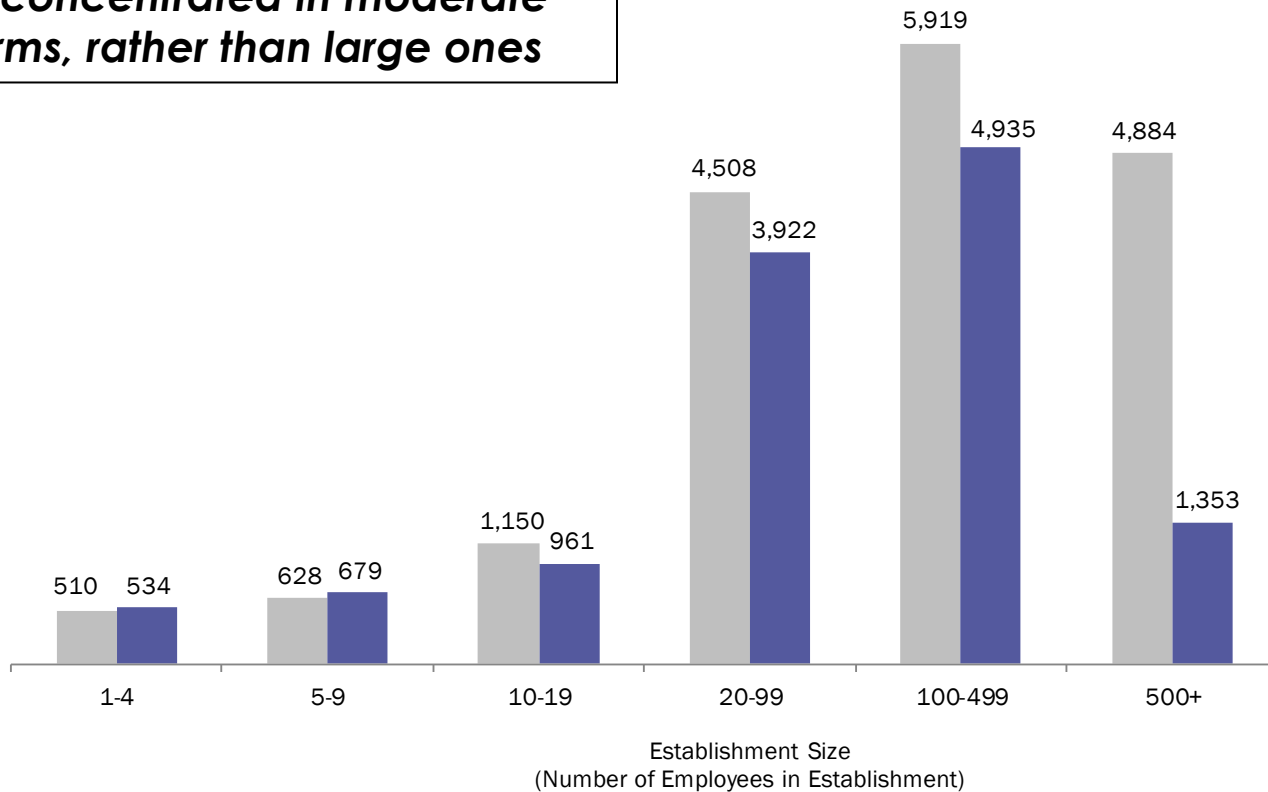
Manufacturing

SARASOTA-BRADENTON: CONSTRUCTION

Sarasota-Bradenton Region
Total Employment by Establishment Size Category
Manufacturing Industry
(2007, 2011)

■ 2007 ■ 2011

- ***Employment in manufacturing is more concentrated in moderate size firms, rather than large ones***



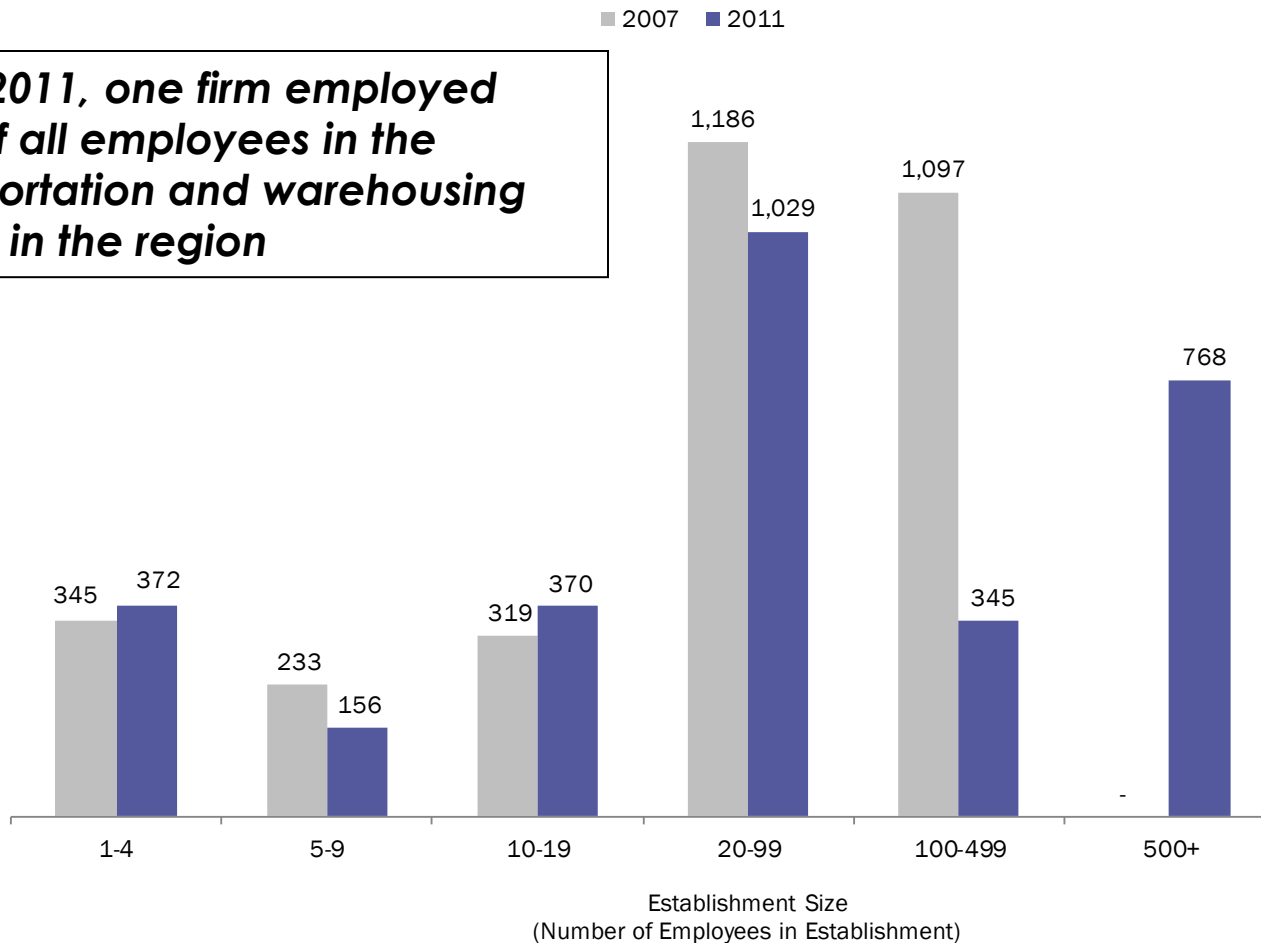
EMPLOYMENT BY EMPLOYER SIZE

Transportation & Warehousing

SARASOTA-BRADENTON: TRANSPORTATION & WAREHOUSING

Sarasota-Bradenton Region
Total Employment by Establishment Size Category
Transportation & Warehousing Industry
(2007, 2011)

- ***As of 2011, one firm employed 25% of all employees in the transportation and warehousing sector in the region***



ANALYSIS OF OCCUPATIONS

By Industry-Subsector

Career Ladders-Key Points

- Career ladders exist in all studied sectors
- In health care and professional/technical services, to reach higher levels typically requires additional certification/education
- In construction, manufacturing, transportation/warehousing, lower formal certification requirements (though also lower wages)

SARASOTA-BRADENTON: HEALTH CARE & SOCIAL ASSISTANCE CAREER LADDER

Medical and Health Services Managers

Annual job openings: 17 in 2-county region

Wage per hour (entry-level, median): \$30.53, \$41.36

Required training/experience: Bachelor's degree

% of jobs in Health Care industry: 78%

Registered Nurses

Annual job openings: 262 in 2-county region

Wage per hour (entry-level, median): \$23.71, \$28.97

Required training/experience: Associate's degree, College Credit Certificate, or Applied Technology Diploma

% of jobs in Health Care industry: 85%

Licensed Practical and Licensed Vocational Nurses

Annual job openings: 100 in 2-county region

Wage per hour (entry-level, median): \$16.73, \$20.81

Required training/experience: Post-secondary vocational certificate

% of jobs in Health Care industry: 83%

Nursing Aides, Orderlies, and Attendants

Annual job openings: 166 in 2-county region

Wage per hour (entry-level, median): \$10.68, \$13.00

Required training/experience: Post-secondary vocational certificate

% of jobs in Health Care industry: 89%

Emergency Medical Technicians and Paramedics

Annual job openings: 12 in 2-county region

Wage per hour (entry-level, median): \$11.62, \$17.54

Required training/experience: Associate's degree, College Credit Certificate, or Applied Technology Diploma

% of jobs in Health Care industry: 67%

Home Health Aides

Annual job openings: 86 in 2-county region

Wage per hour (entry-level, median): \$9.51, \$11.28

Required training/experience: Post-secondary vocational certificate

% of jobs in Health Care industry: 91%

Personal Care Aides

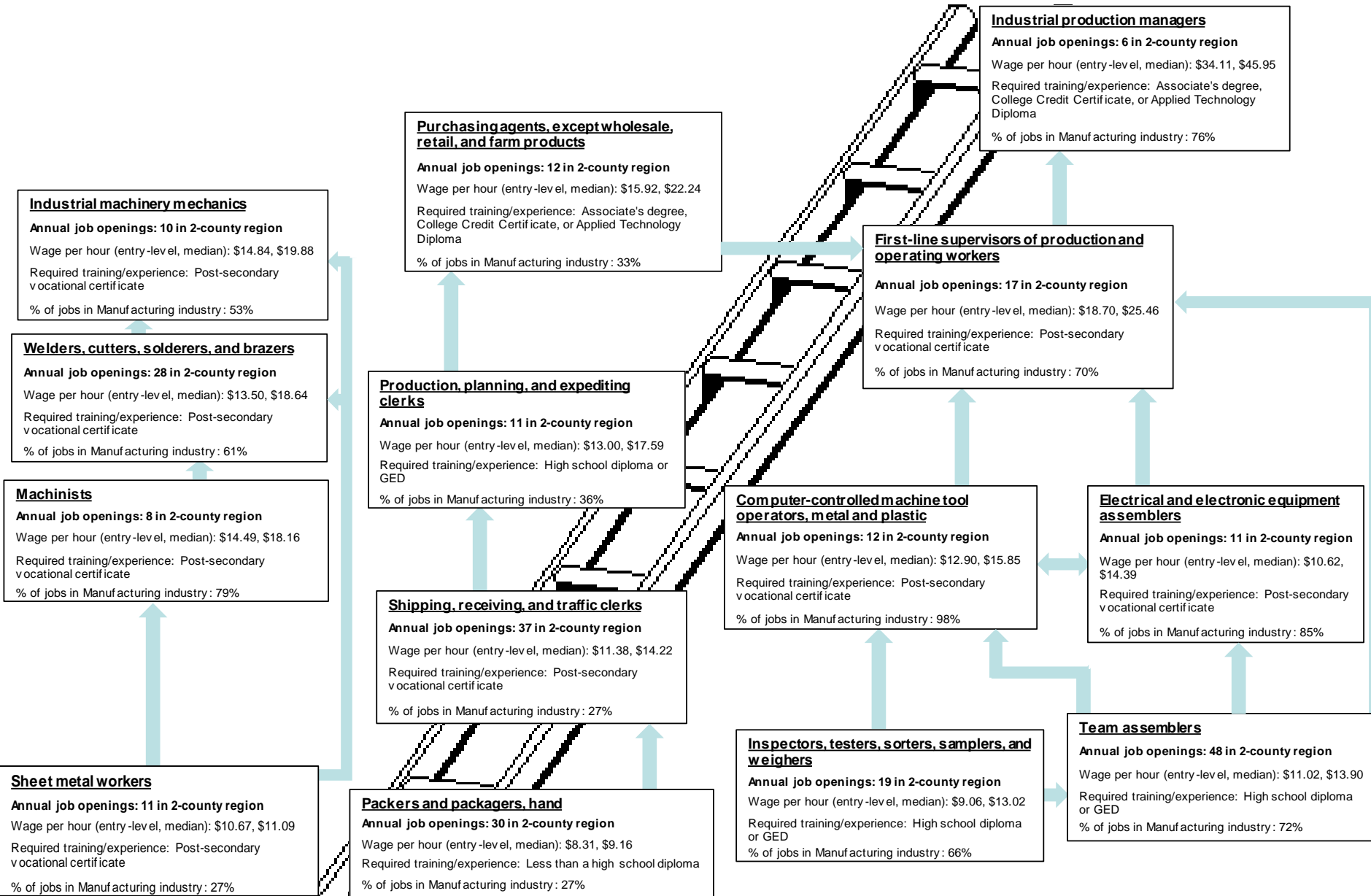
Annual job openings: 48 in 2-county region

Wage per hour (entry-level, median): \$8.24, \$9.61

Required training/experience: Post-secondary vocational certificate

% of jobs in Health Care industry: 74%

SARASOTA-BRADENTON: MANUFACTURING CAREER LADDER



Concluding Points

- Data analysis can be complement to, not substitute for, more in-depth local analysis
- Economic growth potential:
 - Manufacturing (fabricated metal, plastics)
 - Transportation and warehousing
 - Professional and technical services
- Career ladders
 - Professional and technical services typically requires minimum of vocational education certificate for ground-floor
 - Other sectors have true entry-level positions, but may require certification/degree for advancement
- Major challenge of declining earnings