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
**FLORIDA: SARASOTA COUNTY, 2010-12**

### Employment Change 2010-2012

**Annual Average Growth Rate**

- **Management of companies and enterprises**: 15.9%
- **Manufacturing**: 6.7%
- **Retail trade**: 4.7%
- **Wholesale trade**: 3.7%
- **Administrative and waste services**: 3.7%
- **Accommodation and food services**: 3.5%
- **Educational services**: 2.8%
- **Real estate, rental and leasing**: 2.5%
- **Professional and technical services**: 2.4%
- **Total, All Industries**: 2.0%
- **Agriculture, forestry, fishing and hunting**: -2.6%
- **Other services, except public administration**: -1.9%
- **Construction**: -1.5%
- **Transportation and warehousing**: -0.7%
- **Utilities**: -0.6%
- **Information**: -0.5%
- **Health care and social assistance**: 0.0%
- **Finance and insurance**: 1.6%
- **Arts, entertainment and recreation**: 1.9%

- **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**
FLORIDA: MANATEE COUNTY, 2010-2012

Employment Change 2010-2012
Annual Average Growth Rate

- Transportation and warehousing: 41.2%
- Utilities: 20.2%
- Educational services: 8.0%
- Manufacturing: 6.0%
- Accommodation and food services: 5.7%
- Health care and social assistance: 5.4%
- Professional and technical services: 5.1%
- Construction: 4.9%
- Retail trade: 4.3%
- Arts, entertainment and recreation: 3.9%
- Finance and insurance: 3.5%
- Real estate, rental and leasing: 1.9%
- Information: 1.0%
- All Government: 0.4%
- Agriculture, forestry, fishing and hunting: -0.3%
- Wholesale trade: -1.1%
- Other services, except public administration: -2.2%
- Administrative and waste services: -21.3%
- Management of companies and enterprises: -27.1%

• 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

- 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**

![Annual Average Pay, Size, and Growth, 10 Largest Private Industries](chart.png)

- Finance and insurance
- Professional and technical services
- Manufacturing
- Health care and social assistance
- Construction
- Administrative and waste services
- Accommodation and food services
- Arts, entertainment and recreation
- Other services, except public administration
- Retail trade
Job growth in Manatee County was generally better than Sarasota County in previous decade.
• **Broad-based growth in recent years, aside from long term decline in administrative and waste services**
FLORIDA:

ANALYSIS OF SUB-SECTORS

Manufacturing
Long term decline in nearly all manufacturing industries in previous decade
Growth in the largest manufacturing sectors is encouraging.
FLORIDA: MANATEE COUNTY, 2010-2012

Annual Average Pay, Size, and Growth, Manufacturing

- Broad-based growth in manufacturing in Manatee County
• Decline in pay in fabricated metal products is worrying
Pay trends in Manatee County are worse than Sarasota.
FLORIDA:

ANALYSIS OF SUB-SECTORS

Health Care
- **Decline in nursing care facilities and home health care services**
- **Growth in community care facilities for elderly and physicians offices**

<table>
<thead>
<tr>
<th>Category</th>
<th>Average Annual Pay (2012)</th>
<th>Employment Average Annual Growth Rate 2010-2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>General medical and surgical hospitals</td>
<td>$80,000</td>
<td>-15%</td>
</tr>
<tr>
<td>Offices of physicians</td>
<td>$40,000</td>
<td>-10%</td>
</tr>
<tr>
<td>Community care facilities for the elderly</td>
<td>$20,000</td>
<td>-5%</td>
</tr>
<tr>
<td>Nursing care facilities</td>
<td>$15,000</td>
<td>0%</td>
</tr>
<tr>
<td>Home health care services</td>
<td>$10,000</td>
<td>5%</td>
</tr>
<tr>
<td>Offices of other health practitioners</td>
<td>$5,000</td>
<td>10%</td>
</tr>
<tr>
<td>Outpatient care centers</td>
<td>$0</td>
<td>-15%</td>
</tr>
<tr>
<td>Child day care services</td>
<td>$0</td>
<td>10%</td>
</tr>
<tr>
<td>Individual and family services</td>
<td>$0</td>
<td>-15%</td>
</tr>
</tbody>
</table>

**Notes:**
- Averages and percentages are based on the years 2010-2012.
- The data reflects average annual pay and employment growth rates for various sectors within the health and social assistance field in Sarasota County, Florida.
Annual Average Pay, Size, and Growth, Health and Social Assistance

• **Continued wide-spread growth in health care in Manatee County**

* Includes Community Food and Housing Services, which only accounted for 17% of combined employment in 2012.
Pay Growth, Size, and Average Pay, Health and Social Assistance

• Substantial pay declines in most health sectors

- General medical and surgical hospitals
- Offices of physicians
- Community care facilities for the elderly
- Nursing care facilities
- Offices of dentists
- Offices of other health practitioners
- Individual and family services
- Home health care services
- Outpatient care centers
- Nursing care facilities
- Child day care services

Average Annual Pay (2012)

Percent Pay Growth 2010-2012

-25% -20% -15% -10% -5% 0% 5% $80,000 $40,000 $
ANALYSIS OF SUB-SECTORS

Transportation & Warehousing
- VERY rapid growth in key subsectors in Manatee County
- Growth in global trade and e-commerce have contributed to strategic importance of transportation and warehousing in many regions—can Manatee County benefit from these trends?
- Sarasota County has not seen similar growth, at least as of 2012
ANALYSIS OF SUB-SECTORS

Construction
Some recovery in the construction industry, primarily in commercial sector
FLORIDA: SARASOTA COUNTY

Pay Growth, Size, and Average Pay, Construction

- Flat or declining pay in many construction sub-sectors remains a concern

- Pay Growth, Size, and Average Pay, Construction
ANALYSIS OF SUB-SECTORS

Information and Professional & Technical Services

FLORIDA:
• Continued growth in many professional and technical service industries in both counties
But pay is stagnating or declining, even in these relatively high paying industries.

True in both counties, but particularly Manatee.
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
• 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)

- Employment in manufacturing is more concentrated in moderate size firms, rather than large ones.
EMPLOYMENT BY EMPLOYER SIZE

Transportation & Warehousing
• **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**

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**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%

**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%

**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%

**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%

**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%

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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