

# Sarasota-Bradenton Regional Labor Market Update July 2011

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## Summary of findings

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- *Long way to go*: overall employment remains well below pre-recession levels
- *Signs of opportunity*: a few industries that have experienced job growth, despite the recession:
  - *Health Care*: large employment sector with steady growth
  - *Educational services*: smaller total employment than health care, but growing rapidly
  - *Specialized manufacturing*: there are a few small manufacturing sectors with signs of growth
  - *Leisure industries*: signs of recovery in Manatee County primarily—mostly low-wage, but some with better conditions
- *Demographic diversification and inequality*: The region continues to grow in total population, and in ethnic diversity, but with unequal economic opportunities

## Outline of presentation

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- Review overall structure and content of data
- Present updated analysis of labor market trends since 2007, and overall labor market structure
  - Industry analysis
  - Demographic issues
- Highlighting potential opportunities

# Data Analysis

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- 2-county overview and analysis
  - Updates analysis from 3 years ago
- Industry analysis (companies)
  - Latest data from Quarterly Census of Employment and Wages 2010
  - Overall structure
  - Growth, average payroll, concentration
- Sub-sector industry analysis
  - Manufacturing
  - Health care
  - Professional and Technical Services
  - Administrative and Waste Services
  - Construction
- Demographics (people)
  - Latest data from American Community Survey 2009
  - Education, race/ethnicity, age, industry/occupation, unionization



## INDUSTRY STRUCTURE & DYNAMICS

## Recent Industry Dynamics

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- **Great recession impacts**
  - *Between 2007 and 2010, both Sarasota and Manatee Counties experienced substantial employment declines, but Sarasota was more dramatically impacted*
  - *Unemployment levels remain extremely high*
- **“Eds and Meds” strong**
  - *Employment in Education and Health Care Services has continued to grow, despite the recession*
- **Manatee County leisure industry recovering**
  - *Employment in leisure industries (Accommodation/food services, Arts/entertainment/recreation) has recovered in Manatee County to above pre-recession levels*

## Overall Industry Structure

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- Employment declines partially reversing patterns of long term growth
  - *Sarasota County employment down to 1999 levels*
- Job structure clearly driven by combination of elderly population and tourism/recreation
  - *Health care and social assistance*
  - *Retail sales*
  - *Accommodation and food services*
- Relatively low public sector employment
  - *Low school employment perhaps*

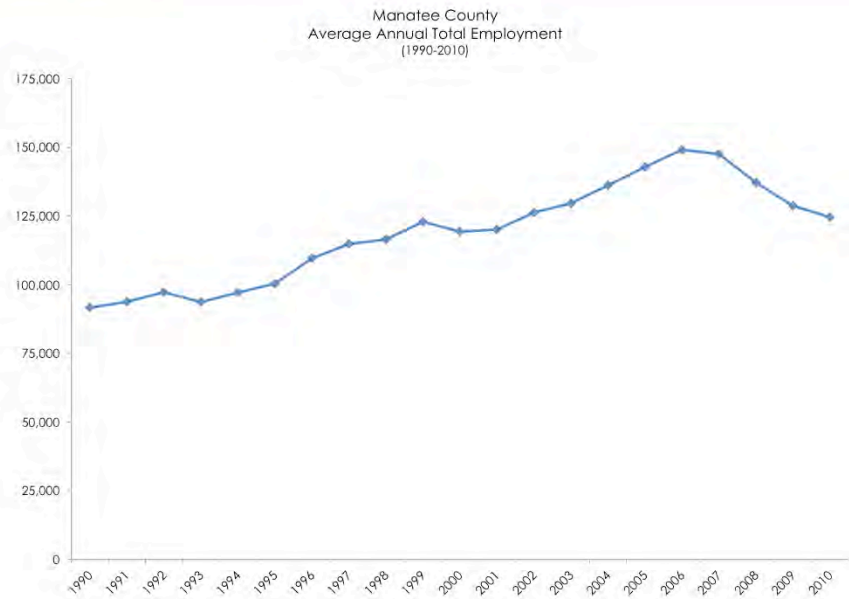


## FLORIDA: SARASOTA COUNTY



This chart shows the average annual total employment from 1990 to 2010.

## FLORIDA: MANATEE COUNTY



This chart shows the average annual total employment from 1990 to 2010.

## FLORIDA: SARASOTA COUNTY



This chart shows the average annual unemployment rate from 1990 to 2010.

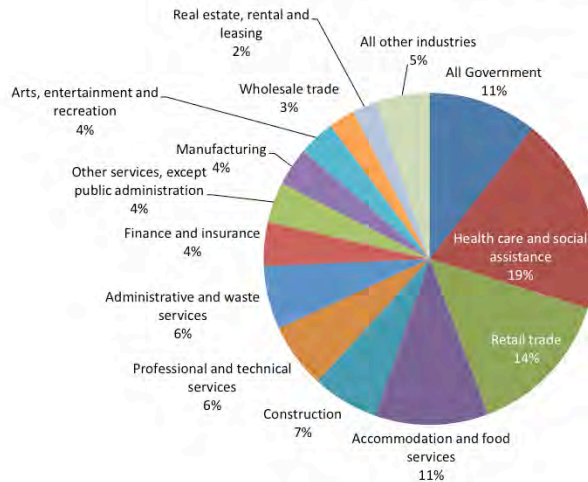
## FLORIDA: MANATEE COUNTY



This chart shows the average annual unemployment rate from 1990 to 2010.

## FLORIDA: SARASOTA COUNTY

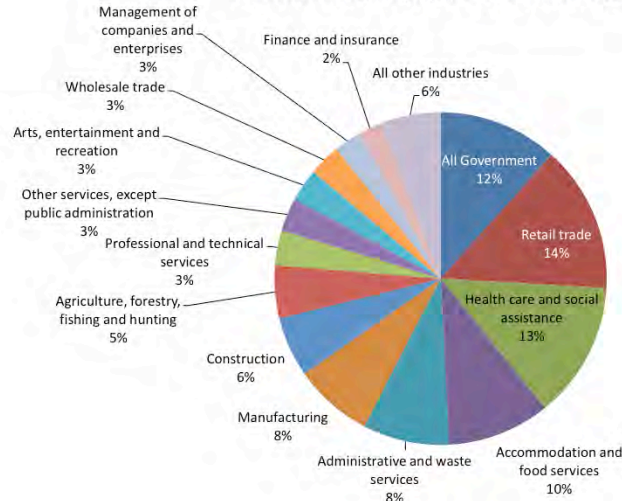
Sarasota County Employment Distribution 2010



This chart shows the overall distribution of employment in the county in 2010.

## FLORIDA: MANATEE COUNTY

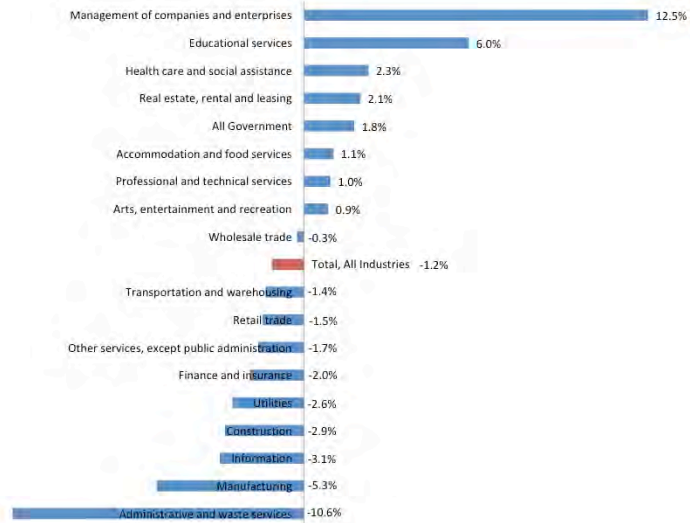
**Manatee County Employment Distribution 2010**



This chart shows the overall distribution of employment in the county in 2010.

## FLORIDA: SARASOTA COUNTY

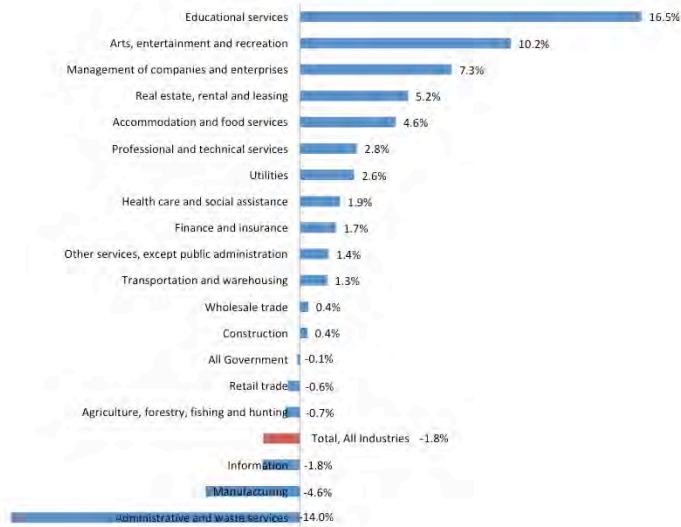
### Employment Change 2001-2010 Annual Average Growth Rate



This chart shows the average annual growth rate by industry sector between 2001-2010

## FLORIDA: MANATEE COUNTY

### Employment Change 2001-2010 Annual Average Growth Rate



This chart shows the average annual growth rate by industry sector between 2001-2010



## ANALYSIS OF INDUSTRY SECTORS

- In the following slides:
  - Bubbles represent industry sectors and sub-sectors
  - Size of bubble is proportional to employment in that sector
  - The horizontal axis represents:
    - Employment Average Annual Growth Rate 2001-2010 in some slides
    - Percent Pay Growth (inflation adjusted) between 2001 and 2010 in the other slides
  - The vertical axis represents:
    - Concentration (a measure of industry competitiveness) in some slides
    - Average Annual pay in 2010 in the other slides
- Bubbles located in the upper right hand quadrant represent more promising sectors in all slides
- Goal is to understand longer term structural trends, not cyclical changes
- First slides represent largest ten sectors in the whole economy
- Subsequent slides provide more detail on sub-sectors
- Each set of bubble-charts is preceded by a table focusing on employment trends from 2007-2010

## FLORIDA: SARASOTA COUNTY

### SARASOTA COUNTY, FLORIDA, ALL 2 DIGIT INDUSTRIES

NAICS CODE	Industry	Employment		Change 2007-2010	
		2007	2010	No.	Percent
62	Health Care and Social Assistance	23,727	25,447	1,720	7.2%
44-45	Retail Trade	21,847	19,104	(2,743)	-12.6%
72	Accommodation and Food Services	15,214	14,670	(544)	-3.6%
23	Construction	15,410	8,580	(6,830)	-44.3%
54	Professional, Scientific, and Technical Services	9,683	8,387	(1,296)	-13.4%
56	Administrative/Support/Waste Management/Remediation Services	13,504	8,170	(5,334)	-39.5%
52	Finance and Insurance	6,780	5,683	(1,097)	-16.2%
81	Other Services (except Public Administration)	6,503	5,215	(1,288)	-19.8%
31-33	Manufacturing	7,482	4,963	(2,519)	-33.7%
71	Arts, Entertainment, and Recreation	4,767	4,678	(89)	-1.9%
42	Wholesale Trade	4,217	3,389	(828)	-19.6%
53	Real Estate and Rental and Leasing	3,654	3,119	(535)	-14.6%
51	Information	2,804	2,282	(522)	-18.6%
61	Educational Services	1,552	2,002	450	29.0%
48-49	Transportation and Warehousing	1,510	1,251	(259)	-17.2%
55	Management of Companies and Enterprises	759	600	(159)	-20.9%
22	Utilities	571	443	(128)	-22.4%
11	Agriculture, Forestry, Fishing and Hunting	281	351	70	24.9%
21	Mining, Quarrying, and Oil and Gas Extraction	97	44	(53)	-54.6%
99	Unclassified	126	14	(112)	-88.9%
	All Government	14,675	14,080	(595)	-4.1%
	Total, All Industries	155,159	132,472	(22,687)	-14.6%

This table shows total employment in the county in 2007 and 2010, and the change in employment between 2007 and 2010, by industry sector.

Note the job growth in health care (NAICS 62) and educational services (NAICS 61). The hardest hit sectors, with the greatest job loss, are construction (NAICS 23) and manufacturing (NAICS 31-33).

## FLORIDA: MANATEE COUNTY

### MANATEE COUNTY, FLORIDA, ALL 2 DIGIT INDUSTRIES

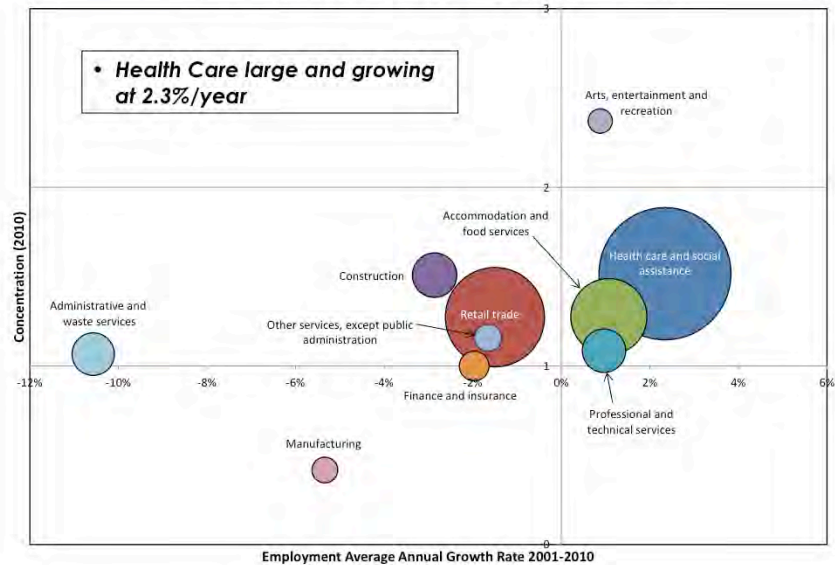
NAICS CODE	Industry	Employment		Change 2007-2010	
		2007	2010	No.	Percent
44-45	Retail Trade	15,948	14,434	(1,514)	-9.5%
62	Health Care and Social Assistance	12,797	13,429	632	4.9%
72	Accommodation and Food Services	9,849	10,101	252	2.6%
56	Administrative/Support/Waste Management/Remediation Services	23,383	8,528	(14,855)	-63.5%
31-33	Manufacturing	9,997	7,787	(2,210)	-22.1%
23	Construction	9,234	5,916	(3,318)	-35.9%
11	Agriculture, Forestry, Fishing and Hunting	6,803	5,201	(1,602)	-23.5%
54	Professional, Scientific, and Technical Services	4,065	3,422	(643)	-15.8%
81	Other Services (except Public Administration)	3,255	3,293	38	1.2%
71	Arts, Entertainment, and Recreation	2,730	3,202	472	17.3%
42	Wholesale Trade	3,741	3,125	(616)	-16.5%
55	Management of Companies and Enterprises	2,953	2,681	(272)	-9.2%
52	Finance and Insurance	3,051	2,335	(716)	-23.5%
53	Real Estate and Rental and Leasing	2,136	2,075	(61)	-2.9%
61	Educational Services	697	1,508	811	116.4%
48-49	Transportation and Warehousing	1,278	1,121	(157)	-12.3%
51	Information	1,325	989	(336)	-25.4%
22	Utilities	212	207	(5)	-2.4%
21	Mining, Quarrying, and Oil and Gas Extraction	27	23	(4)	-14.8%
99	Unclassified	77	5	(72)	-93.5%
	All Government	12,392	11,787	(605)	-4.9%
	-11% Total, All Industries	124,872	101,166	(23,706)	-19.0%

This table shows total employment in the county in 2007 and 2010, and the change in employment between 2007 and 2010, by industry sector.

Note the job growth in health care (NAICS 62), educational services (NAICS 61), and the arts, entertainment and recreation industry (NAICS 71). The hardest hit sectors, with the greatest job loss, are construction (NAICS 23) and manufacturing (NAICS 31-33).

## FLORIDA: SARASOTA COUNTY

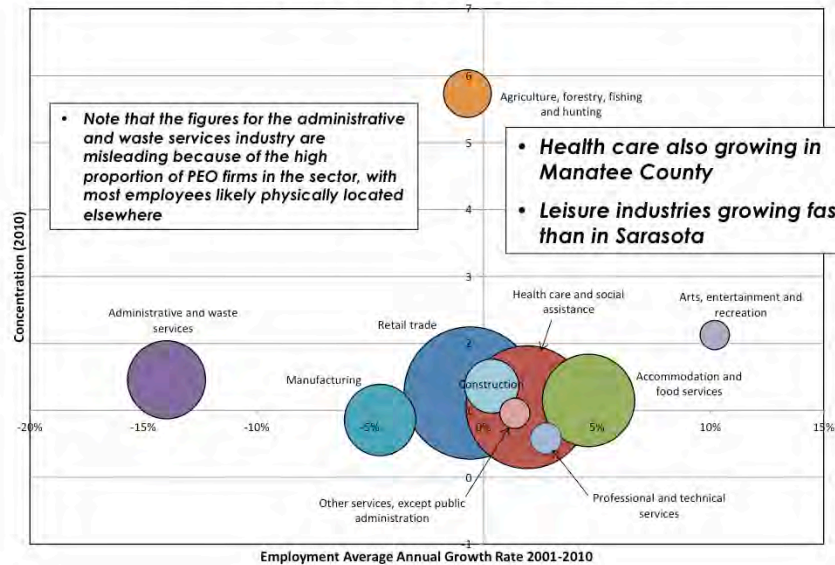
Concentration, Size, and Growth, 10 Largest Private Industries



This chart shows average annual employment growth rate along the horizontal axis and the level of employment concentration along the vertical axis (a value higher than 1.0 means that a higher proportion of people work in that industry in the county than in the nation as a whole). The size of the bubble is proportional to the number of people employed in that industry.

## FLORIDA: MANATEE COUNTY

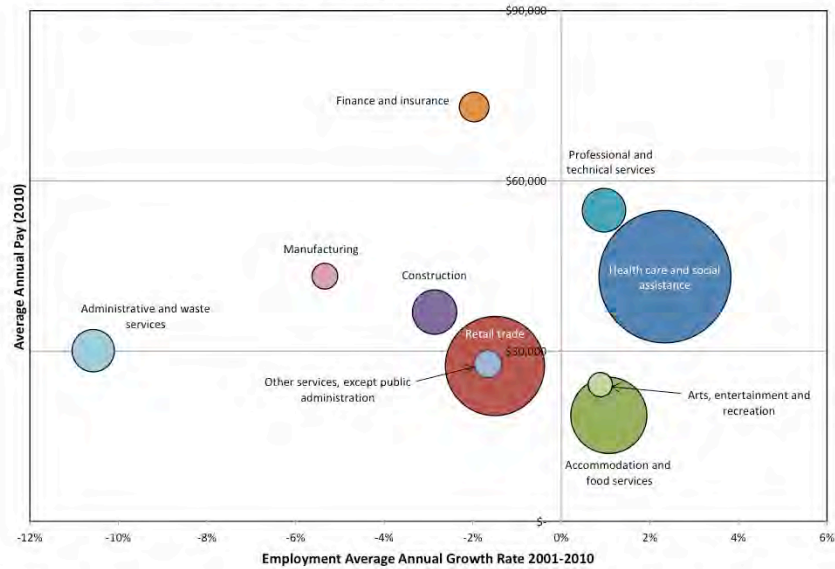
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## FLORIDA: SARASOTA COUNTY

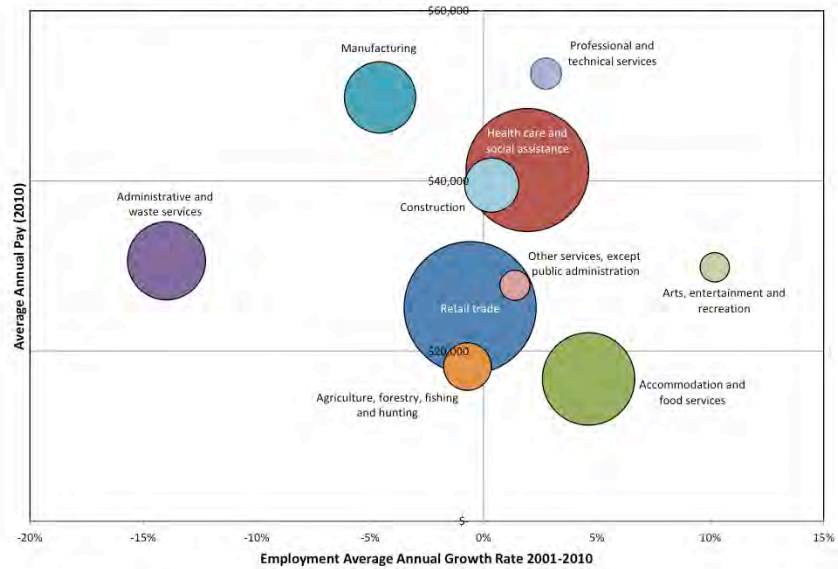
Annual Average Pay, Size, and Growth, 10 Largest Private Industries



This chart shows average annual employment growth rate between 2001 and 2010 rate along the horizontal axis and the average annual pay in 2010 along the vertical axis. The size of the bubble is proportional to the number of people employed in that industry.

## FLORIDA: MANATEE COUNTY

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

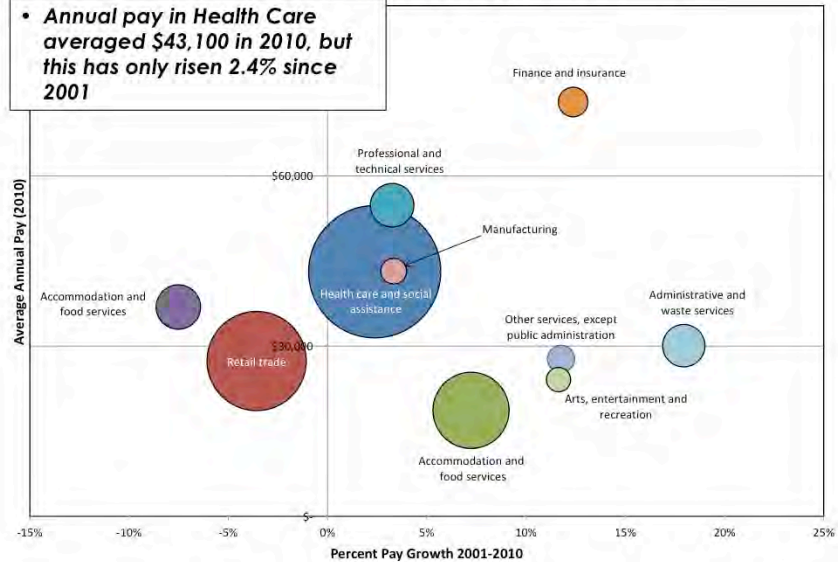


This chart shows average annual employment growth rate between 2001 and 2010 rate along the horizontal axis and the average annual pay in 2010 along the vertical axis. The size of the bubble is proportional to the number of people employed in that industry.

## FLORIDA: SARASOTA COUNTY

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

- Annual pay in Health Care averaged \$43,100 in 2010, but this has only risen 2.4% since 2001

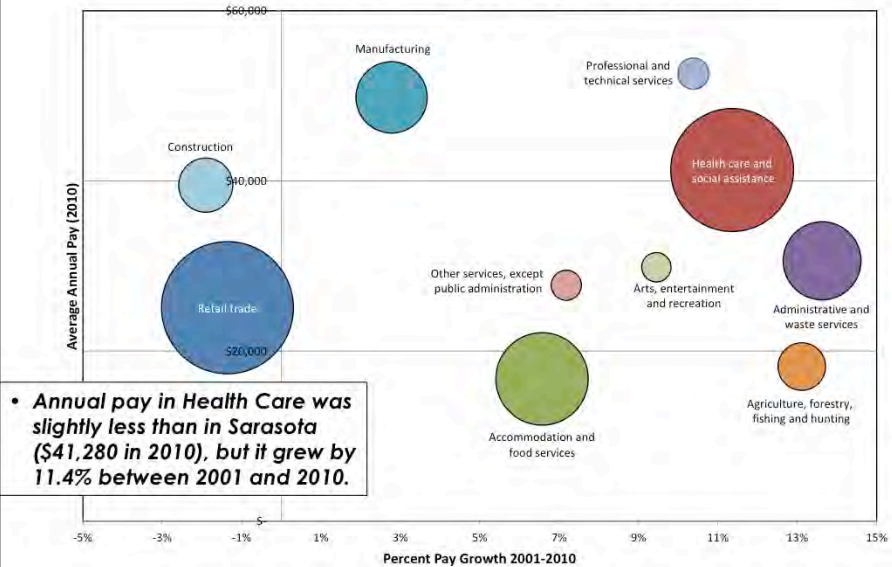


This chart shows the total percent increase in inflation-adjusted average annual pay between 2001 and 2010 along the horizontal axis and the average annual pay in 2010 along the vertical axis. The size of the bubble is proportional to the number of people employed in that industry.



## FLORIDA: MANATEE COUNTY

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



This chart shows the total percent increase in inflation-adjusted average annual pay between 2001 and 2010 along the horizontal axis and the average annual pay in 2010 along the vertical axis. The size of the bubble is proportional to the number of people employed in that industry.

## ANALYSIS OF SUB-SECTORS: Manufacturing

- Substantial employment declines since 2007 (34% in Sarasota, 22% in Manatee)
- Trends in important sub-sectors:
  - *Fabricated metal products:*
    - *Still largest sub-sector. Major employment decline (48% since 2007) in Sarasota, but less in Manatee (17%)*
  - *Food Manufacturing:*
    - *Large employment sector in Manatee. Long-term employment decline seems to have eased a little since 2007*
  - *Some growing sectors even during recession!!*
    - *Plastics/Rubber Products Manufacturing in Sarasota*
    - *Chemical Manufacturing in Manatee*

## FLORIDA: SARASOTA COUNTY

### SARASOTA COUNTY, FLORIDA, MANUFACTURING (NAICS 31-33)

Industry	Employment		Change 2007-2010	
	2007	2010	No.	Percent
Fabricated Metal Product Manufacturing	2,472	1,285	(1,187)	-48.0%
Plastics and Rubber Products Manufacturing	524	615	91	17.4%
Miscellaneous Manufacturing	561	574	13	2.3%
Computer and Electronic Product Manufacturing	706	485	(221)	-31.3%
Printing and Related Support Activities	476	358	(118)	-24.8%
Machinery Manufacturing	408	340	(68)	-16.7%
Furniture and Related Product Manufacturing	463	279	(184)	-39.7%
Chemical Manufacturing	342	235	(107)	-31.3%
Nonmetallic Mineral Product Manufacturing	653	181	(472)	-72.3%
Wood Product Manufacturing	316	180	(136)	-43.0%

This table shows total employment in the county in 2007 and 2010, and the change in employment between 2007 and 2010, by industry sector.

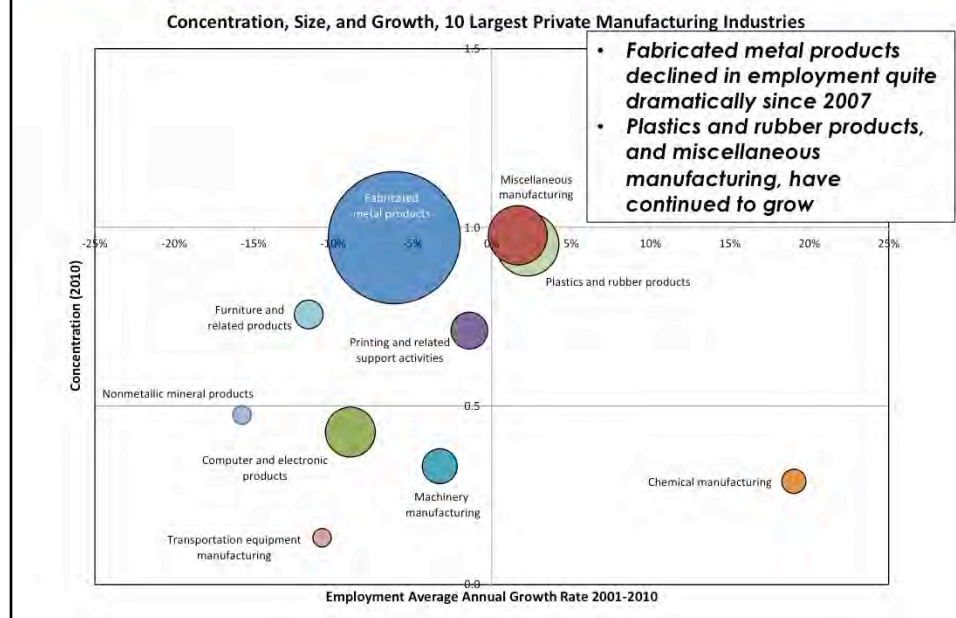
## FLORIDA: MANATEE COUNTY

### MANATEE COUNTY, FLORIDA, MANUFACTURING (NAICS 31-33)

Industry	Employment		Change 2007-2010	
	2007	2010	No.	Percent
Food Manufacturing	1,559	1,318	(241)	-15.5%
Fabricated Metal Product Manufacturing	1,497	1,245	(252)	-16.8%
Transportation Equipment Manufacturing	2,221	992	(1,229)	-55.3%
Miscellaneous Manufacturing	822	710	(112)	-13.6%
Computer and Electronic Product Manufacturing	645	638	(7)	-1.1%
Machinery Manufacturing	617	470	(147)	-23.8%
Furniture and Related Product Manufacturing	540	409	(131)	-24.3%
Electrical Equipment, Appliance, and Component Manufacturing	486	339	(147)	-30.2%
Textile Product Mills	326	328	2	0.6%
Chemical Manufacturing	146	324	178	121.9%
Nonmetallic Mineral Product Manufacturing	256	195	(61)	-23.8%

This table shows total employment in the county in 2007 and 2010, and the change in employment between 2007 and 2010, by industry sector.

## FLORIDA: SARASOTA COUNTY



For sub-sectors within manufacturing industries, this chart shows average annual employment growth rate along the horizontal axis and the level of employment concentration along the vertical axis (a value higher than 1.0 means that a higher proportion of people work in that industry in the county than in the nation as a whole). The size of the bubble is proportional to the number of people employed in that industry.

Roughly 76% of the Fabricated metal products manufacturing in 2010 was in NAICS 3323 Architectural and Structural Metals, down from 85% in 2007.

The bulk of this is in Metal Window and Door Manufacturing (NAICS 332321).

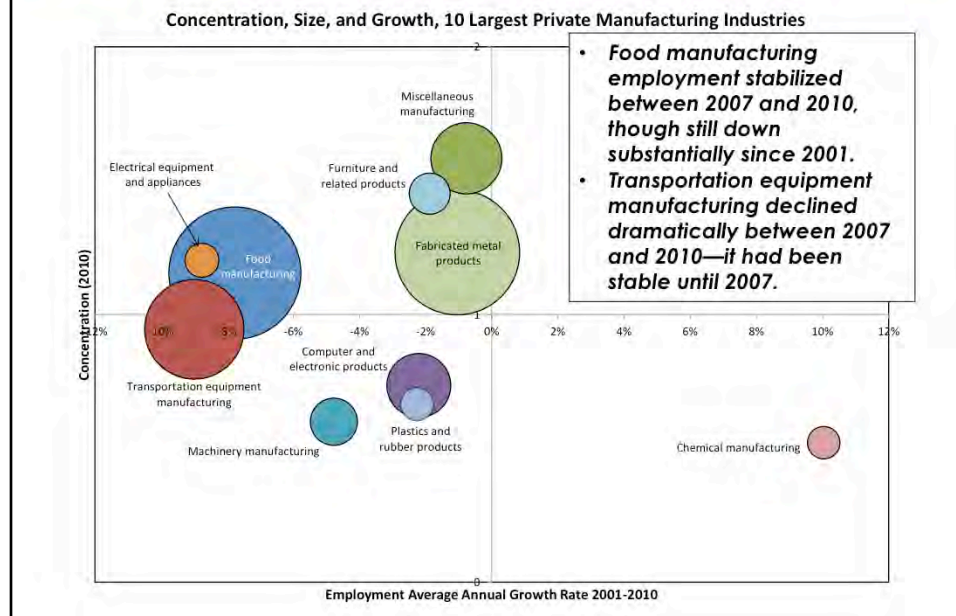
According to County Business Patterns in 2009, there were 41 companies in the county in Fabricated metal products, down from 45 in 2007. Total employment was 1,730, down from 2,846 just two years earlier. 17 of the firms were in Architectural and Structural Metals, down from 20 in 2007.

In 2010, 615 people were employed in Plastics and Rubber Products (NAICS 326), up from 524 in 2007. It is hard to know exactly what this is, since the bulk of employment in this sector is in NAICS 326199, "All other plastics production manufacturing". According to County Business Patterns there were 2 firms employing 100-249 employees each in this sub-sector in 2009 (out of 11 total firms in this sector, 7 of which only had 1-4 employees).

In 2010, 574 were employed in Miscellaneous Manufacturing (NAICS 339), up from 561 in 2007. The largest subsector here was NAICS 3391, Medical Equipment and Supplies Manufacturing, which employed 395 people in 2010.

In 2010, 235 people were employment in Chemical manufacturing (NAICS 325), down from 342 in 2007, but up from 49 in 2001. There was a big jump between 2004 and 2005—likely a new company setting up in the area. Because of non-disclosure requirements, it is hard to tell exactly what this is. Possible sub-sectors, based on firms identified in County Business Patterns, include: Basic Organic Chemical manufacturing (NAICS 325199), Synthetic rubber manufacturing (NAICS 325212), Paint and coating manufacturing (NAICS 325510), Adhesive manufacturing (NAICS 325520), and Photographic film, paper, plate, and chemical manufacturing (NAICS 325992), and Other miscellaneous chemical product manufacturing (NAICS 325998).

## FLORIDA: MANATEE COUNTY



For sub-sectors within manufacturing industries, this chart shows average annual employment growth rate along the horizontal axis and the level of employment concentration along the vertical axis (a value higher than 1.0 means that a higher proportion of people work in that industry in the county than in the nation as a whole). The size of the bubble is proportional to the number of people employed in that industry.

In 2010, 1318 people were employed in food manufacturing (NAICS 311), compared to 1559 in 2007. This includes a very large firm (over 1000 employees in 2009 according to County Business Patterns) in Fruit and Vegetable Canning (NAICS 311421), and 234 people employed in Bakeries and Tortilla Manufacturing (NAICS 3118).

In 2010, 992 people were employed in “Transportation equipment manufacturing” (NAICS 336), down from 2221 in 2007. Of the 2010 total, 257 were employed in Aerospace Product and Parts Manufacturing (NAICS 3364), 194 (down from 978 in 2007!) were employed in “Ship and boat building” (NAICS 3366), and 89 (down from 491 in 2007) were employed in Motor vehicle parts manufacturing (NAICS 3363). Employment in “Motor vehicle body and trailer manufacturing” (NAICS 3362), which was 426 in 2007, had declined to the point of being non-discloseable in 2010.

In 2010, 1245 people were employed in “Fabricated metal product manufacturing” (NAICS 332), down from 1497 people in 2007. Of the 2010 total, 623 was in “Other Fabricated Metal Product Manufacturing (NAICS 3329), 322 (down from 451 in 2007) was in “Architectural and structural metals mfg” (NAICS 3323), and 148 (up from 141 in 2007) was in “Machine shops and threaded product mfg” (NAICS 3327).

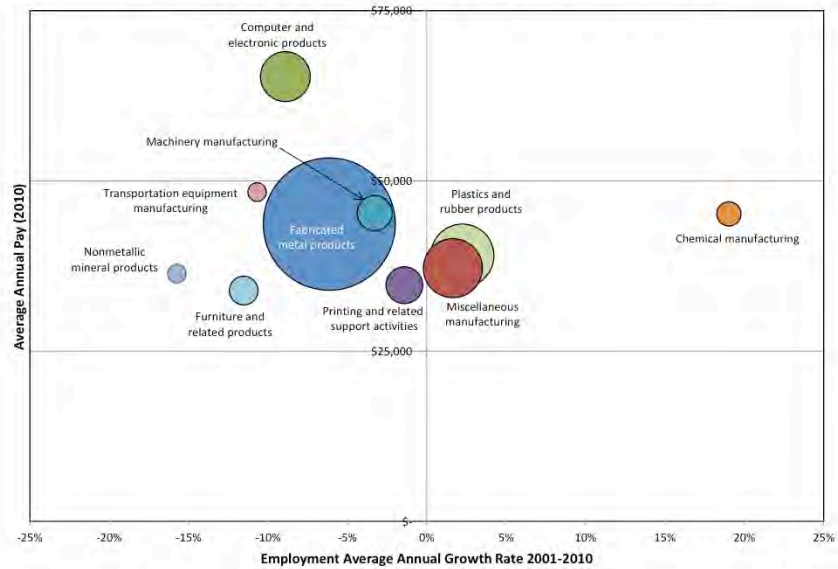
Chemical Manufacturing (NAICS 325) employed 324 people in 2010, more than double the employment in 2007 (146). Because of non-disclosure requirements, it is hard to tell exactly what this is. Possible sub-sectors, based on firms identified in County Business Patterns, include: Industrial Gas Manufacturing (NAICS 325120), Fertilizer (mixing only) manufacturing (NAICS 325314), Pharmaceutical preparation manufacturing (NAICS 325412), Paint and coating manufacturing (NAICS 325510), and Printing Ink Manufacturing (NAICS 325910).

Computer and electronic products (NAICS 334) employed 638 in 2010, down from 645 in 2007 and from 780 in 2001. Of the 2010 total, 334 people is in Communications equipment manufacturing (NAICS 3342).

Miscellaneous manufacturing (NAICS 339) employed 710 people in 2010, down from 822 people in 2007, and from 761 in 2001. Most employment in this sub-sector (623 out of the 710) is in Medical equipment and supplies manufacturing (NAICS 3391).

## FLORIDA: SARASOTA COUNTY

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

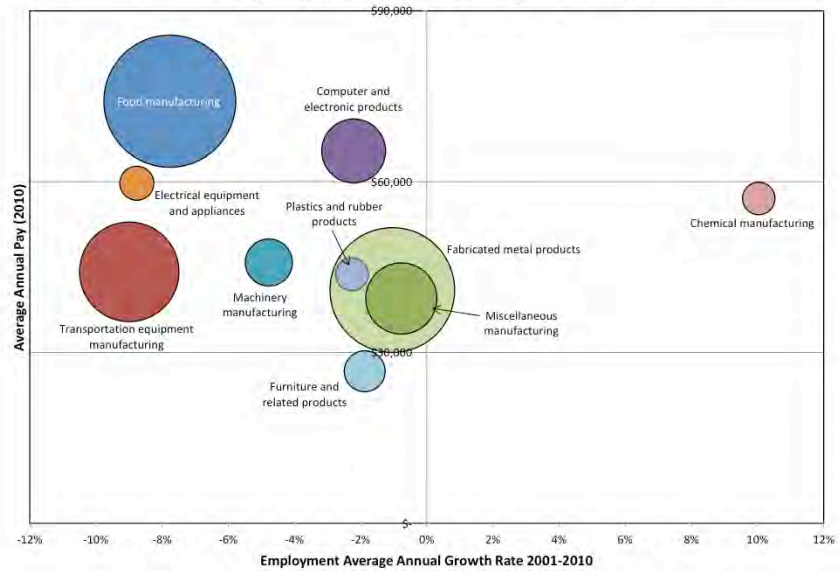


For sub-sectors within manufacturing industries, this chart shows average annual employment growth rate between 2001 and 2010 rate along the horizontal axis and the average annual pay in 2010 along the vertical axis. The size of the bubble is proportional to the number of people employed in that industry.



## FLORIDA: MANATEE COUNTY

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

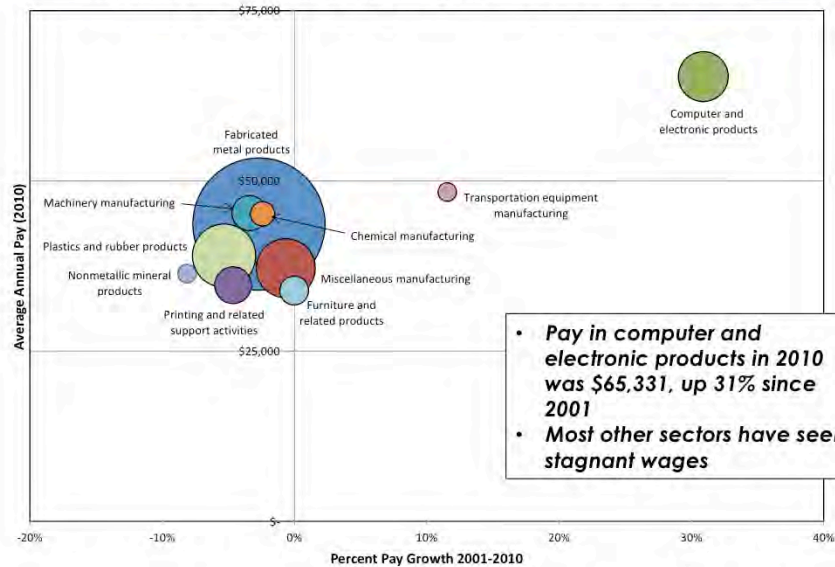


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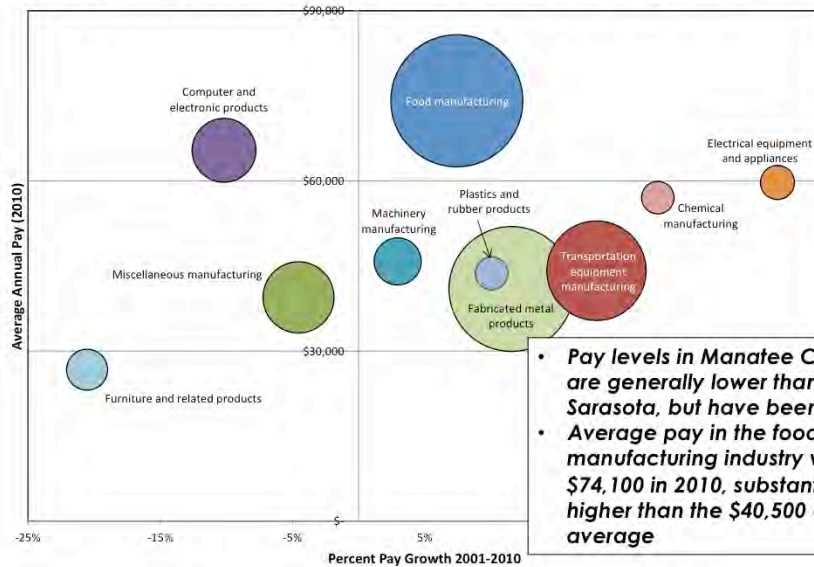
Pay Growth, Size, and Average Pay, 10 Largest Private Manufacturing Industries



For sub-sectors within manufacturing industries, this chart shows the total percent increase in inflation-adjusted average annual pay between 2001 and 2010 along the horizontal axis and the average annual pay in 2010 along the vertical axis. The size of the bubble is proportional to the number of people employed in that industry.

## FLORIDA: MANATEE COUNTY

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



- Pay levels in Manatee County are generally lower than in Sarasota, but have been rising.
- Average pay in the food manufacturing industry was \$74,100 in 2010, substantially higher than the \$40,500 U.S. average

For sub-sectors within manufacturing industries, this chart shows the total percent increase in inflation-adjusted average annual pay between 2001 and 2010 along the horizontal axis and the average annual pay in 2010 along the vertical axis. The size of the bubble is proportional to the number of people employed in that industry.

## ANALYSIS OF SUB-SECTORS: Health Care

- Overall continued employment growth despite recession (7% since 2007 for Sarasota, 5% for Manatee)
- This growth has been across all sub-sectors in Sarasota County
- Employment in Manatee County has been uneven:
  - Employment decline in Nursing Care and Outpatient Care Facilities
  - Employment growth in Home health care services and Community Care Facilities for the elderly.
- Largest employment subsector is still hospitals, but employment levels there are stable, not growing

## FLORIDA: SARASOTA COUNTY

### SARASOTA COUNTY, FLORIDA, Health Care (NAICS 62)

Industry	Employment		Change 2007-2010	
	2007	2010	No.	Percent
General Medical and Surgical Hospitals	6,084	6,125	41	0.7%
Offices of Physicians	3,901	4,279	378	9.7%
Community Care Facilities for the Elderly	3,324	3,446	122	3.7%
Nursing Care Facilities	2,543	3,024	481	18.9%
Home Health Care Services	1,847	2,324	477	25.8%
Offices of Dentists	1,302	1,466	164	12.6%
Individual and Family Services	876	1,183	307	35.0%
Offices of Other Health Practitioners	1,230	1,170	(60)	-4.9%
Outpatient Care Centers	778	591	(187)	-24.0%
Child Day Care Services	518	466	(52)	-10.0%

This table shows total employment in the county in 2007 and 2010, and the change in employment between 2007 and 2010, by industry sector.

## FLORIDA: MANATEE COUNTY

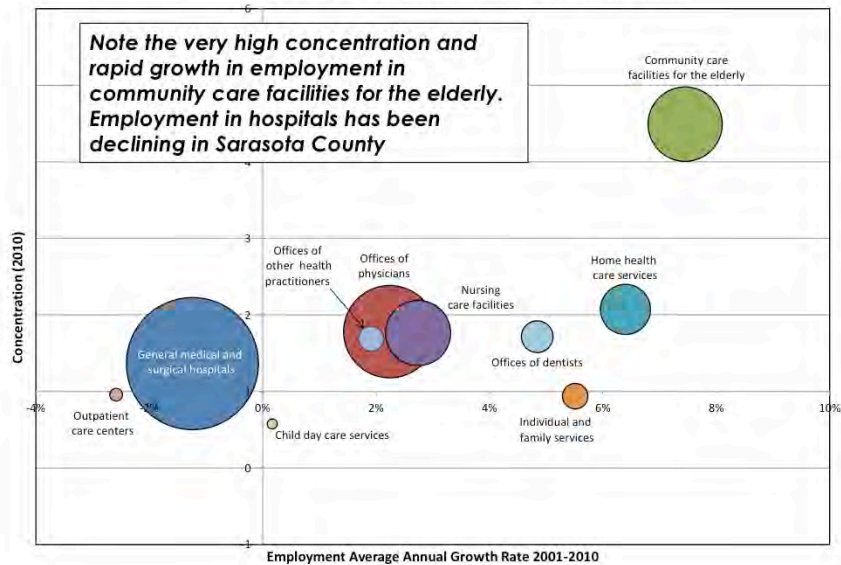
### MANATEE COUNTY, FLORIDA, Health Care (NAICS 62)

Industry	Employment		Change 2007-2010	
	2007	2010	No.	Percent
Offices of Physicians	3,293	3,290	(3)	-0.1%
Hospitals	2,816	2,783	(33)	-1.2%
Nursing Care Facilities	1,576	1,439	(137)	-8.7%
Community Care Facilities for the Elderly	1,009	1,294	285	28.2%
Offices of Other Health Practitioners	604	754	150	24.8%
Home Health Care Services	414	718	304	73.4%
Offices of Dentists	695	686	(9)	-1.3%
Child Day Care Services	501	672	171	34.1%
Outpatient Care Centers	575	343	(232)	-40.3%
Individual and Family Services	467	335	(132)	-28.3%

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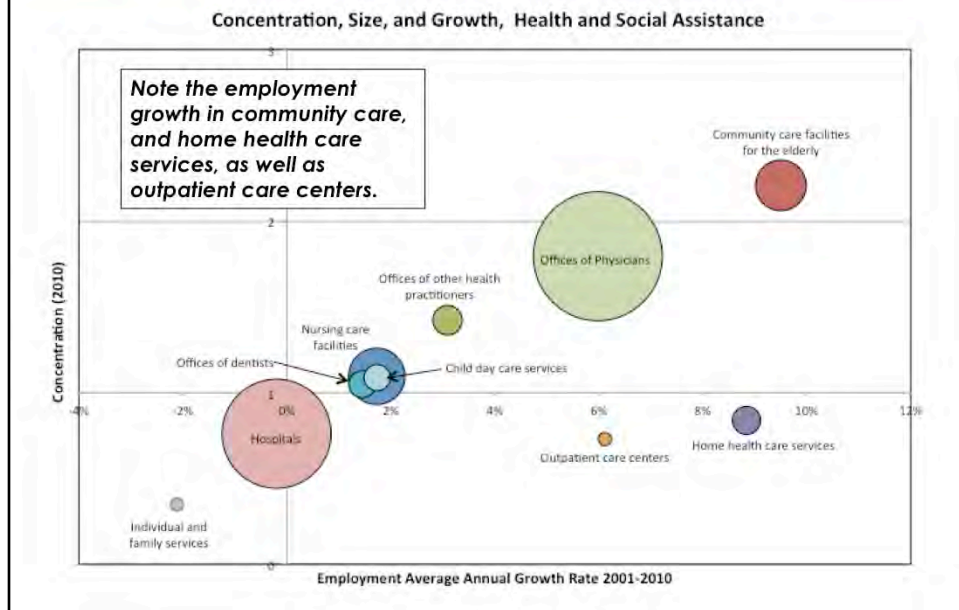
## FLORIDA: SARASOTA COUNTY

Concentration, Size, and Growth, Health and Social Assistance



For sub-sectors within health care and social assistance industries, this chart shows average annual employment growth rate along the horizontal axis and the level of employment concentration along the vertical axis (a value higher than 1.0 means that a higher proportion of people work in that industry in the county than in the nation as a whole). The size of the bubble is proportional to the number of people employed in that industry.

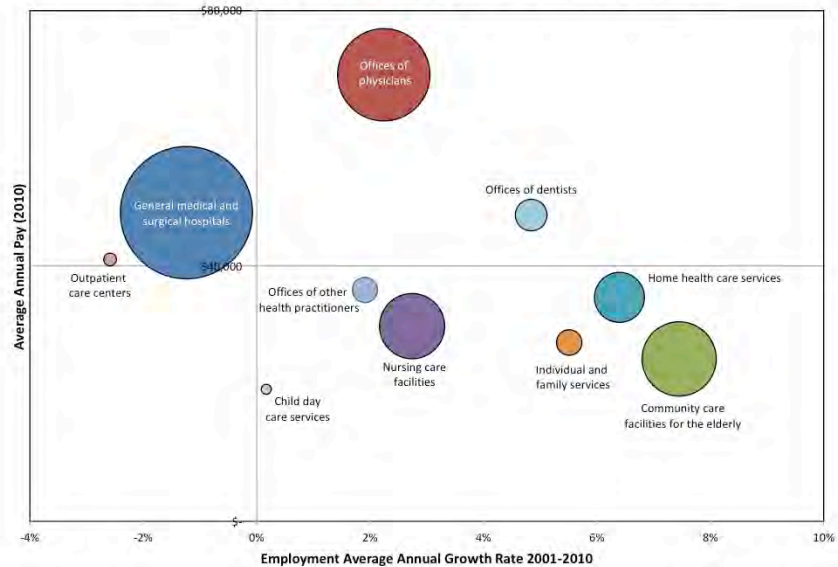
## FLORIDA: MANATEE COUNTY



For sub-sectors within health care and social assistance industries, this chart shows average annual employment growth rate along the horizontal axis and the level of employment concentration along the vertical axis (a value higher than 1.0 means that a higher proportion of people work in that industry in the county than in the nation as a whole). The size of the bubble is proportional to the number of people employed in that industry.

## FLORIDA: SARASOTA COUNTY

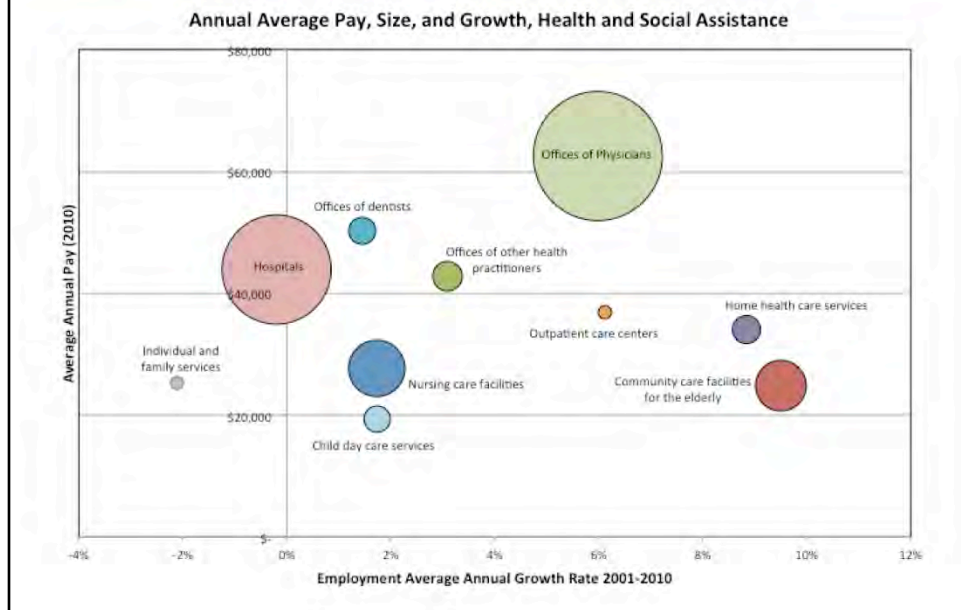
Annual Average Pay, Size, and Growth, Health and Social Assistance



For sub-sectors within health care and social assistance industries, this chart shows average annual employment growth rate between 2001 and 2010 along the horizontal axis and the average annual pay in 2010 along the vertical axis. The size of the bubble is proportional to the number of people employed in that industry.

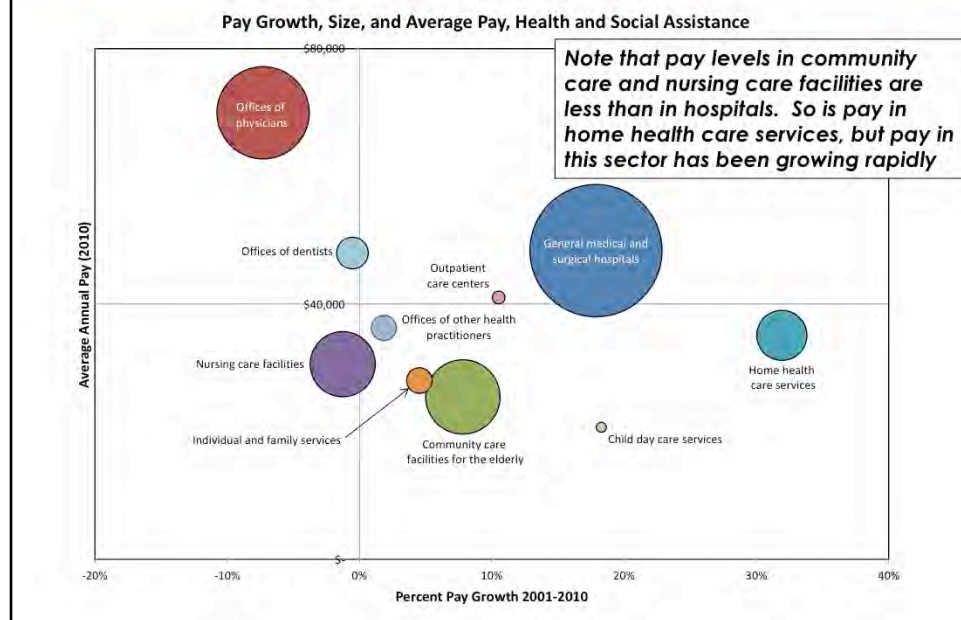


## FLORIDA: MANATEE COUNTY



For sub-sectors within health care and social assistance industries, this chart shows average annual employment growth rate between 2001 and 2010 along the horizontal axis and the average annual pay in 2010 along the vertical axis. The size of the bubble is proportional to the number of people employed in that industry.

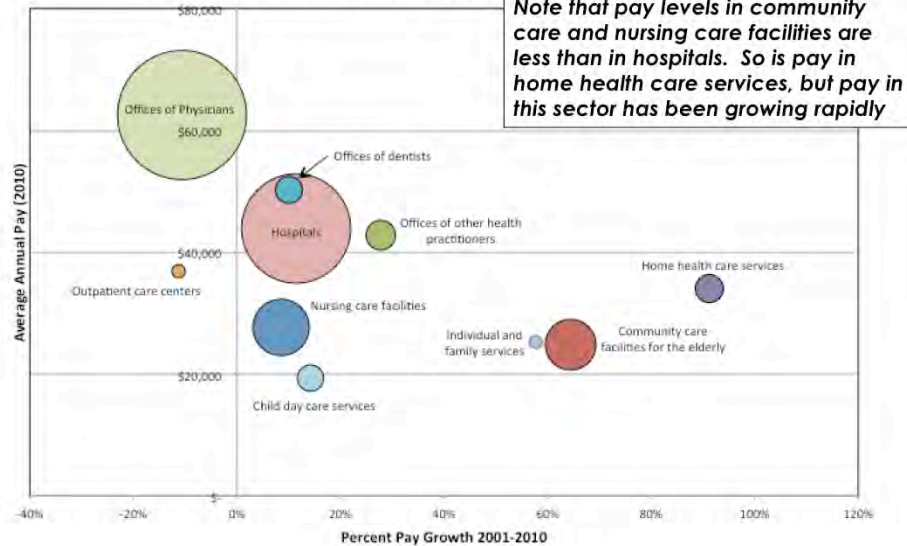
## FLORIDA: SARASOTA COUNTY



For sub-sectors within health care and social assistance industries, this chart shows the total percent increase in inflation-adjusted average annual pay between 2001 and 2010 along the horizontal axis and the average annual pay in 2010 along the vertical axis. The size of the bubble is proportional to the number of people employed in that industry.

## FLORIDA: MANATEE COUNTY

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



For sub-sectors within health care and social assistance industries, this chart shows the total percent increase in inflation-adjusted average annual pay between 2001 and 2010 along the horizontal axis and the average annual pay in 2010 along the vertical axis. The size of the bubble is proportional to the number of people employed in that industry.

## ANALYSIS OF SUB-SECTORS: Administrative & Waste Services

- There has been a dramatic decline in employment in this sector since 2007.
- Official figures show 40% decline in Sarasota County and 64% decline in Manatee County.
- This decline is probably exaggerated because much of the employment in this sector are administrative sites for Professional Employer Organizations (PEOs), whose employees are likely to mostly be located elsewhere

## FLORIDA: SARASOTA COUNTY

### SARASOTA COUNTY, FLORIDA, Administrative and Waste Services (NAICS 56)

Industry	Employment		Change 2007-2010	
	2007	2010	No.	Percent
Services to Buildings and Dwellings	4,116	3,979	(137)	-3.3%
Employment Services	6,088	1,068	(5,020)	-82.5%
Business Support Services	968	948	(20)	-2.1%
Investigation and Security Services	580	716	136	23.4%
Office Administrative Services	513	456	(57)	-11.1%
Travel Arrangement and Reservation Services	557	392	(165)	-29.6%
Waste Collection	269	214	(55)	-20.4%

This table shows total employment in the county in 2007 and 2010, and the change in employment between 2007 and 2010, by industry sector.

## FLORIDA: MANATEE COUNTY

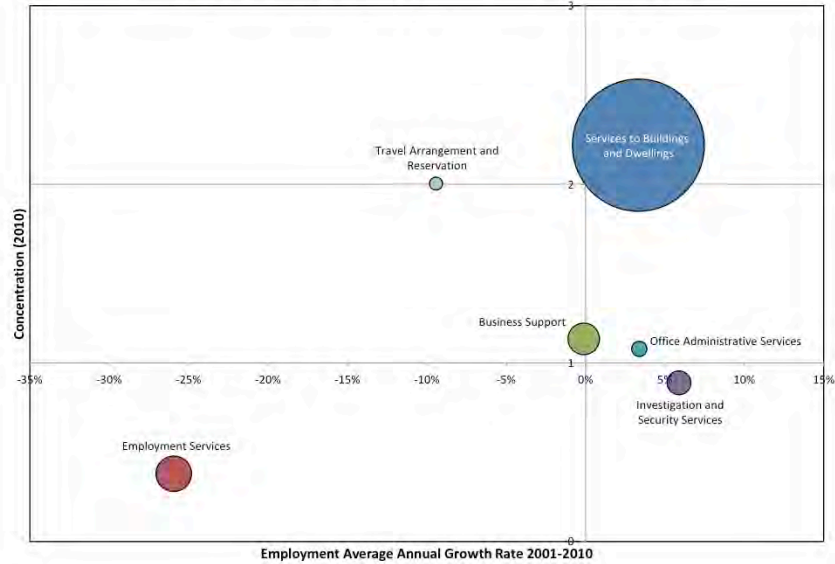
### MANATEE COUNTY, FLORIDA, Administrative and Waste Services (NAICS 56)

Industry	Employment		Change 2007-2010	
	2007	2010	No.	Percent
Employment Services	19,839	5,278	(14,561)	-73.4%
Services to Buildings and Dwellings	2,427	2,038	(389)	-16.0%
Business Support Services	179	383	204	114.0%
Office Administrative Services	319	249	(70)	-21.9%
Other Support Services	79	220	141	178.5%
Investigation and Security Services	154	118	(36)	-23.4%
Travel Arrangement and Reservation Services	78	74	(4)	-5.1%
Remediation and Other Waste Management Services	145	6	(139)	-95.9%

This table shows total employment in the county in 2007 and 2010, and the change in employment between 2007 and 2010, by industry sector.

## FLORIDA: SARASOTA COUNTY

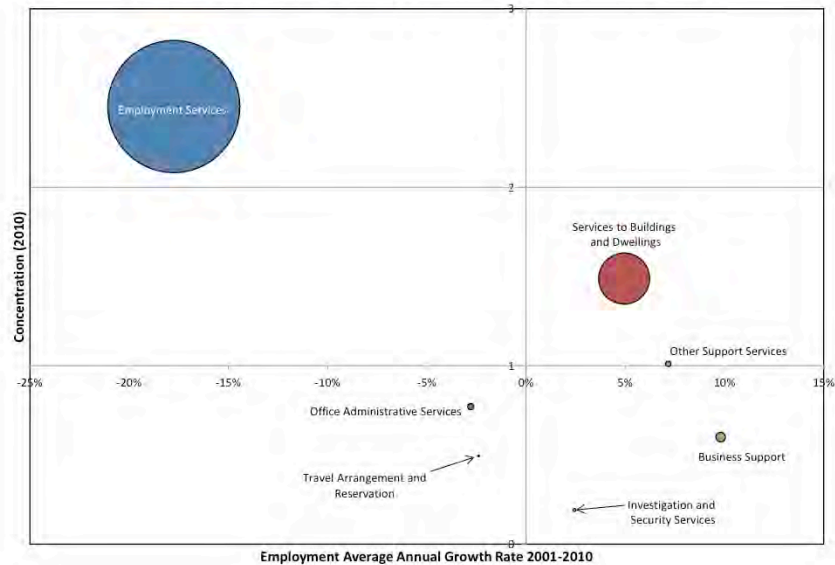
Concentration, Size, and Growth, Administrative and Waste Services



For sub-sectors within administrative and waste services industries, this chart shows average annual employment growth rate along the horizontal axis and the level of employment concentration along the vertical axis (a value higher than 1.0 means that a higher proportion of people work in that industry in the county than in the nation as a whole). The size of the bubble is proportional to the number of people employed in that industry.

## FLORIDA: MANATEE COUNTY

Concentration, Size, and Growth, Administrative and Waste Services

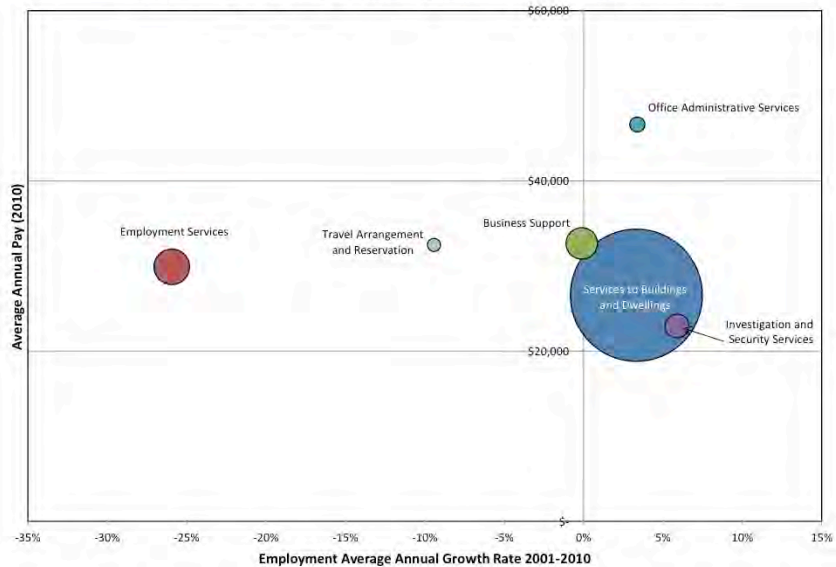


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## FLORIDA: SARASOTA COUNTY

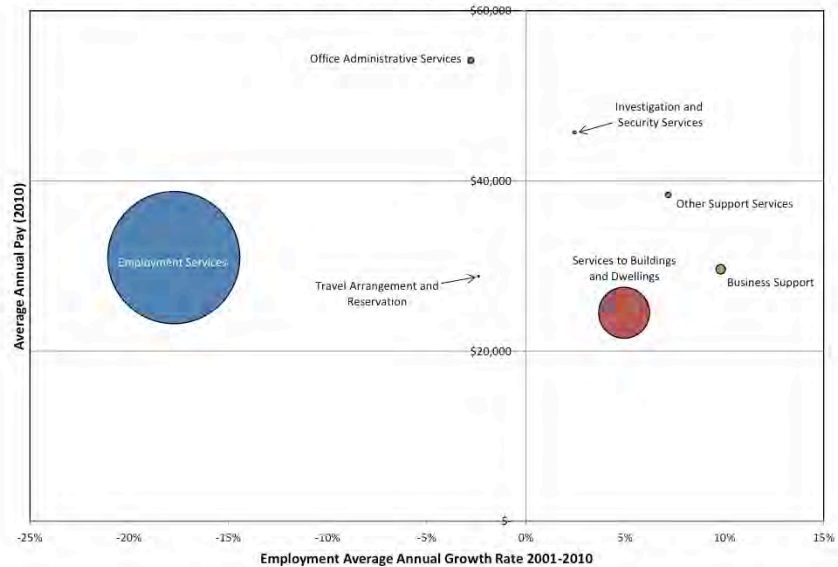
Annual Average Pay, Size, and Growth, Administrative and Waste Services



For sub-sectors within administrative and waste services industries, this chart shows average annual employment growth rate between 2001 and 2010 along the horizontal axis and the average annual pay in 2010 along the vertical axis. The size of the bubble is proportional to the number of people employed in that industry.

## FLORIDA: MANATEE COUNTY

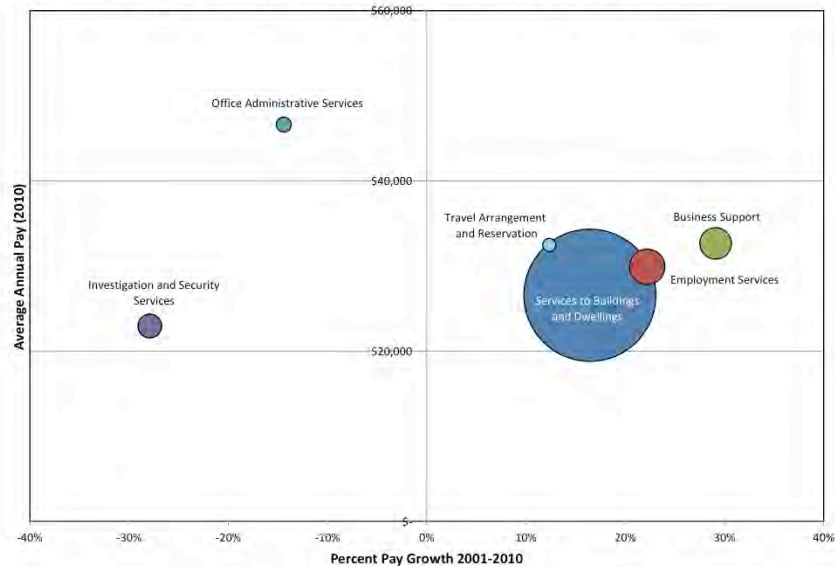
Annual Average Pay, Size, and Growth, Administrative and Waste Services



For sub-sectors within administrative and waste services industries, this chart shows average annual employment growth rate between 2001 and 2010 along the horizontal axis and the average annual pay in 2010 along the vertical axis. The size of the bubble is proportional to the number of people employed in that industry.

## FLORIDA: SARASOTA COUNTY

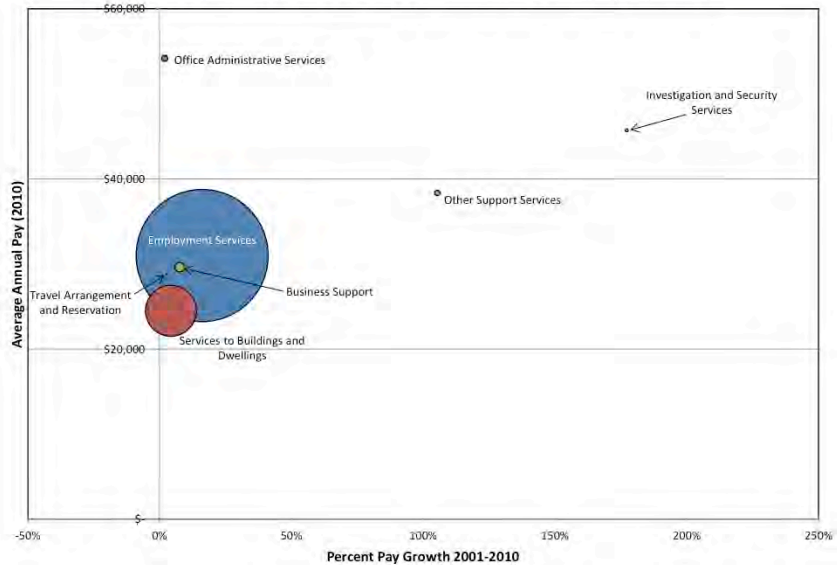
Pay Growth, Size, and Average Pay, Administrative and Waste Services



For sub-sectors within administrative and waste services industries, this chart shows the total percent increase in inflation-adjusted average annual pay between 2001 and 2010 along the horizontal axis and the average annual pay in 2010 along the vertical axis. The size of the bubble is proportional to the number of people employed in that industry.

## FLORIDA: MANATEE COUNTY

Pay Growth, Size, and Average Pay, Administrative and Waste Services



For sub-sectors within administrative and waste services industries, this chart shows the total percent increase in inflation-adjusted average annual pay between 2001 and 2010 along the horizontal axis and the average annual pay in 2010 along the vertical axis. The size of the bubble is proportional to the number of people employed in that industry.

## ANALYSIS OF SUB-SECTORS: Professional & Technical Services

- Since 2007, employment in this sector has declined by 13% in Sarasota County and 16% in Manatee County
- The most dramatic declines are in sub-sectors linked with the construction industry (Architectural/Engineering, and Specialized Design services)
- Some growth, despite the recession, in Scientific related services
- Long-term growth is still substantial, and annual earnings are generally high

## FLORIDA: SARASOTA COUNTY

### SARASOTA COUNTY, FLORIDA, Professional and Technical Services (NAICS 54)

Industry	Employment		Change 2007-2010	
	2007	2010	No.	Percent
Legal Services	2,061	1,762	(299)	-14.5%
Other Professional, Scientific, and Technical Services	1,645	1,584	(61)	-3.7%
Accounting, Tax Preparation, Bookkeeping, and Payroll Services	1,249	1,216	(33)	-2.6%
Management, Scientific, and Technical Consulting Services	1,111	1,187	76	6.8%
Architectural, Engineering, and Related Services	1,589	993	(596)	-37.5%
Computer Systems Design and Related Services	986	980	(6)	-0.6%
Advertising, Public Relations, and Related Services	379	255	(124)	-32.7%
Scientific Research and Development Services	289	232	(57)	-19.7%
Specialized Design Services	374	177	(197)	-52.7%

This table shows total employment in the county in 2007 and 2010, and the change in employment between 2007 and 2010, by industry sector.

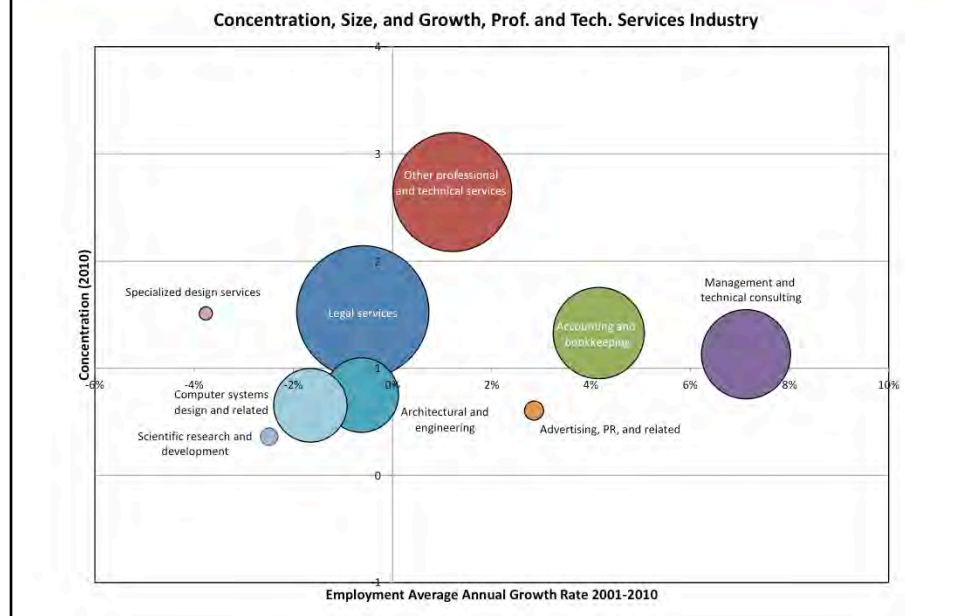
## FLORIDA: MANATEE COUNTY

### MANATEE COUNTY, FLORIDA, Professional and Technical Services (NAICS 54)

Industry	Employment		Change 2007-2010	
	2007	2010	No.	Percent
Legal Services	736	695	(41)	-5.6%
Other Professional, Scientific, and Technical Services	539	582	43	8.0%
Management, Scientific, and Technical Consulting Services	528	471	(57)	-10.8%
Accounting, Tax Preparation, Bookkeeping, and Payroll Services	556	463	(93)	-16.7%
Architectural, Engineering, and Related Services	857	457	(400)	-46.7%
Computer Systems Design and Related Services	450	420	(30)	-6.7%
Specialized Design Services	220	141	(79)	-35.9%
Advertising, Public Relations, and Related Services	150	101	(49)	-32.7%
Scientific Research and Development Services	28	91	63	225.0%

This table shows total employment in the county in 2007 and 2010, and the change in employment between 2007 and 2010, by industry sector.

## FLORIDA: SARASOTA COUNTY



For sub-sectors within this industry, this chart shows average annual employment growth rate along the horizontal axis and the level of employment concentration along the vertical axis (a value higher than 1.0 means that a higher proportion of people work in that industry in the county than in the nation as a whole). The size of the bubble is proportional to the number of people employed in that industry.

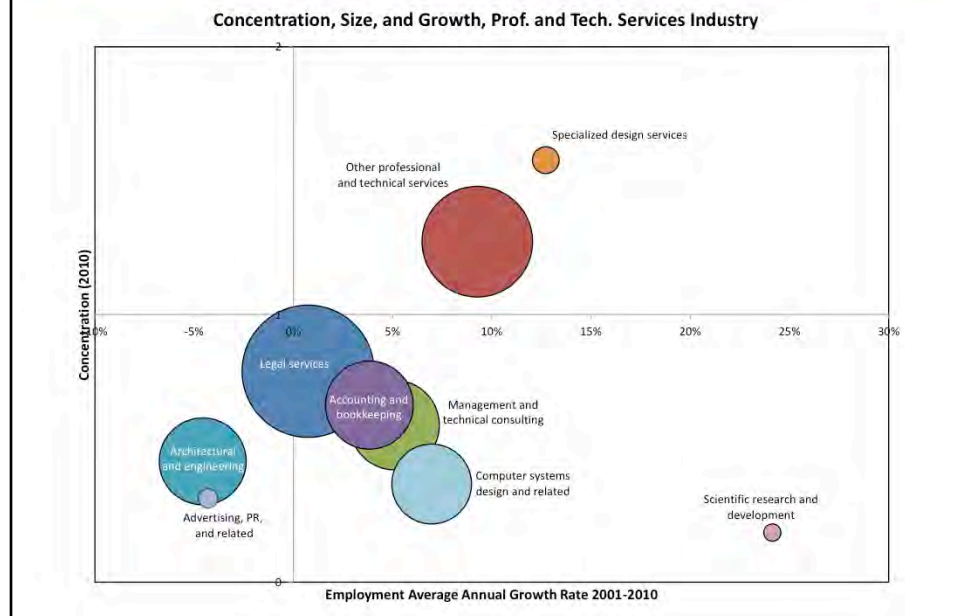
Within “Other professional and technical services” (NAICS 5419), the two largest sub-sectors are Marketing Research and Public Opinion Polling (54191) and Veterinary Services (54194).

Specialized design services (NAICS 5414) employed 177 people in 2010, down from 374 people in 2007 and from 250 in 2001. Prominent sub-sectors within this sector are Interior Design Services (NAICS 54141) and graphic design services (NAICS 54143)

Computer systems design (NAICS 5415) employed 980 people in 2010, down only slightly from 986 in 2007 and from 1139 in 2001.



## FLORIDA: MANATEE COUNTY



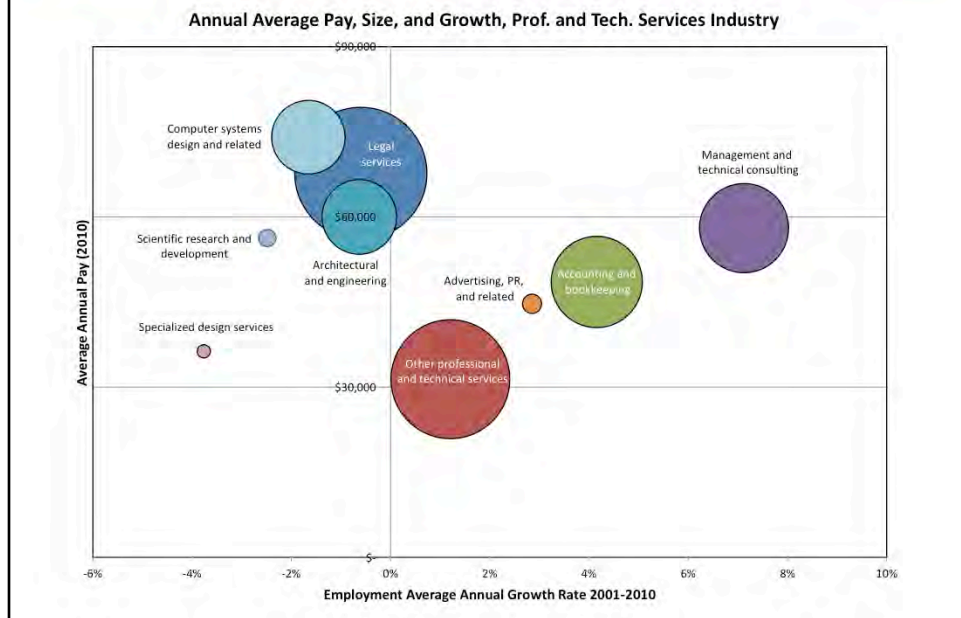
For sub-sectors within this industry, this chart shows average annual employment growth rate along the horizontal axis and the level of employment concentration along the vertical axis (a value higher than 1.0 means that a higher proportion of people work in that industry in the county than in the nation as a whole). The size of the bubble is proportional to the number of people employed in that industry.

Management and technical consulting (NAICS 5416) employed 471 people in 2010, down from 528 people in 2007.

Other professional and technical services (NAICS 5419) employed 580 people in 2010, up from 539 people in 2007. The largest sub-categories were Veterinary services (NAICS 54194) and “All other professional and technical services” (NAICS 54199).

Specialized design services (NAICS 5414) employed only 220 people in 2007, up from 48 in 2001, but down from 256 in 2006. 113 (51%) were in Interior Design Services (NAICS 54141), and 81 (37%) were in Industrial design services (NAICS 54142)

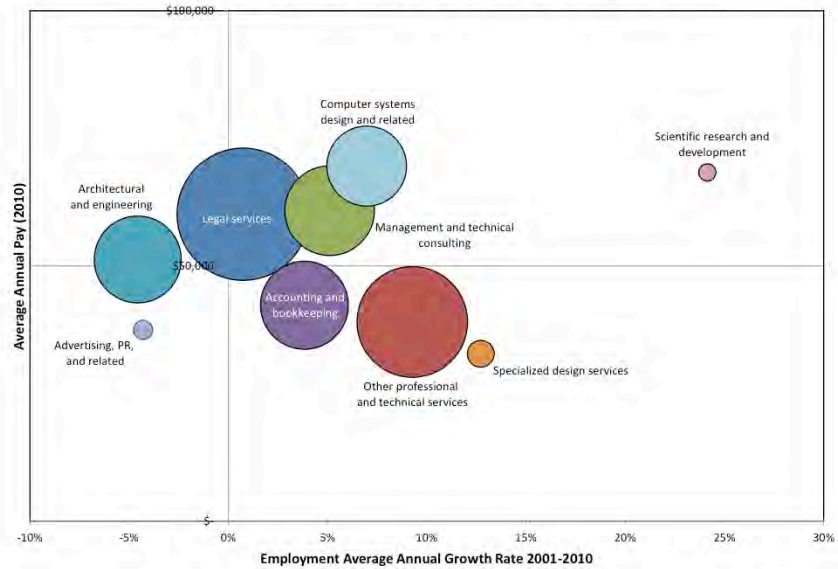
## FLORIDA: SARASOTA COUNTY



For sub-sectors within this industry, this chart shows average annual employment growth rate between 2001 and 2010 along the horizontal axis and the average annual pay in 2010 along the vertical axis. The size of the bubble is proportional to the number of people employed in that industry.

## FLORIDA: MANATEE COUNTY

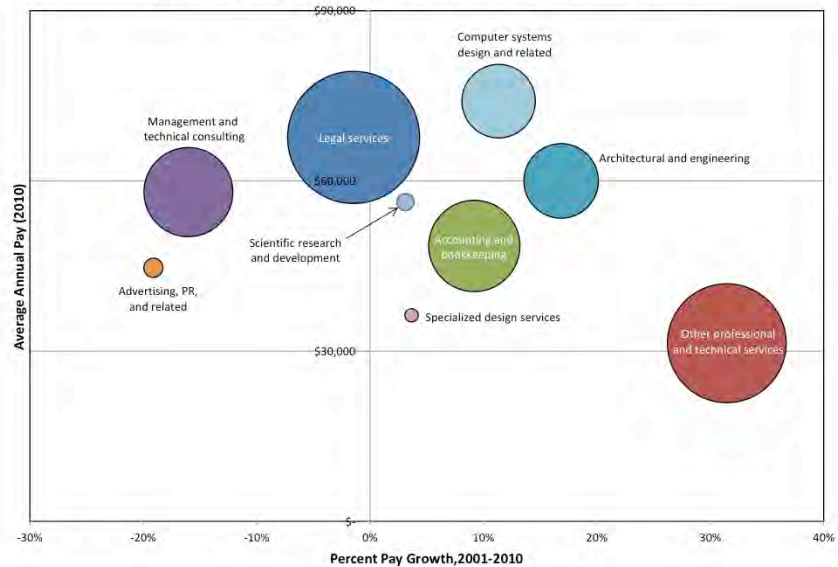
Annual Average Pay, Size, and Growth, Prof. and Tech. Services Industry



For sub-sectors within this industry, this chart shows average annual employment growth rate between 2001 and 2010 along the horizontal axis and the average annual pay in 2010 along the vertical axis. The size of the bubble is proportional to the number of people employed in that industry.

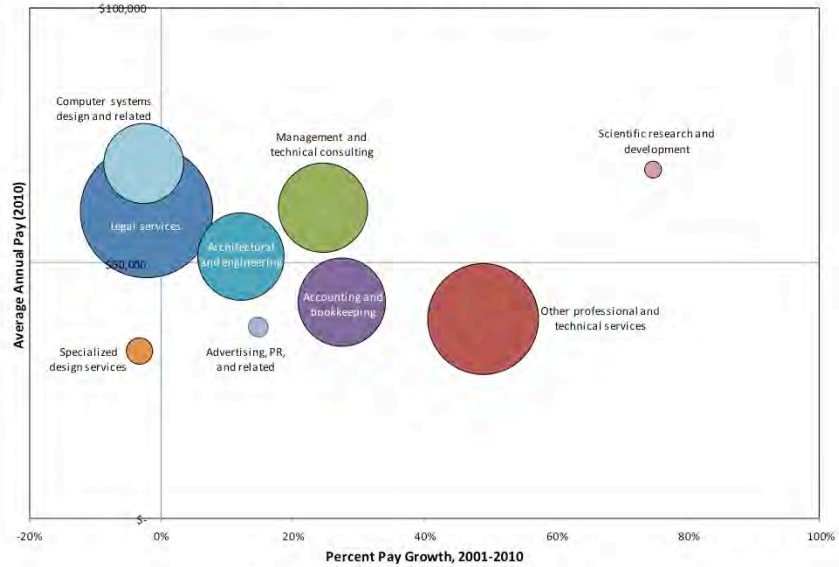
## FLORIDA: SARASOTA COUNTY

Pay Growth, Size, and Average Pay, Prof. and Tech. Services Industry



For sub-sectors within this industry, this chart shows the total percent increase in inflation-adjusted average annual pay between 2001 and 2010 along the horizontal axis and the average annual pay in 2010 along the vertical axis. The size of the bubble is proportional to the number of people employed in that industry.

Pay Growth, Size, and Average Pay, Prof. and Tech. Services Industry



For sub-sectors within this industry, this chart shows the total percent increase in inflation-adjusted average annual pay between 2001 and 2010 along the horizontal axis and the average annual pay in 2010 along the vertical axis. The size of the bubble is proportional to the number of people employed in that industry.

## ANALYSIS OF SUB-SECTORS: Construction

- Construction is the sector most dramatically impacted by the recession. Overall construction employment in 2010 was down 44% from 2007 in Sarasota County and 36% in Manatee County
- Non-residential building construction in Manatee County seems to be showing some signs of recovery, but it will take a long time in both counties to recover to pre-recession employment levels

## FLORIDA: SARASOTA COUNTY

### SARASOTA COUNTY, FLORIDA, Construction (NAICS 23)

Industry	Employment		Change 2007-2010	
	2007	2010	No.	Percent
Building Equipment Contractors	3,694	2,442	(1,252)	-33.9%
Foundation, Structure, and Building Exterior Contractors	2,994	1,560	(1,434)	-47.9%
Residential Building Construction	2,642	1,309	(1,333)	-50.5%
Building Finishing Contractors	2,443	1,112	(1,331)	-54.5%
Other Specialty Trade Contractors	1,446	886	(560)	-38.7%
Nonresidential Building Construction	732	443	(289)	-39.5%
Highway, Street, and Bridge Construction	627	308	(319)	-50.9%
Utility System Construction	414	254	(160)	-38.6%
Other Heavy and Civil Engineering Construction	186	167	(19)	-10.2%
Land Subdivision	234	98	(136)	-58.1%

This table shows total employment in the county in 2007 and 2010, and the change in employment between 2007 and 2010, by industry sector.

## FLORIDA: MANATEE COUNTY

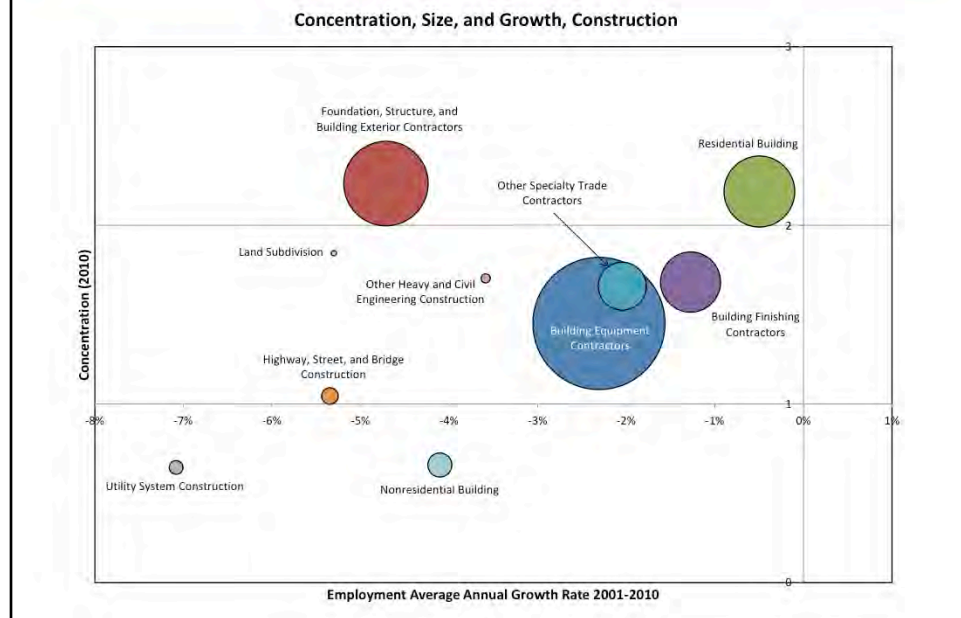
### MANATEE COUNTY, FLORIDA, Construction (NAICS 23)

Industry	Employment		Change 2007-2010	
	2007	2010	No.	Percent
Building Equipment Contractors	2,038	1,513	(525)	-25.8%
Foundation, Structure, and Building Exterior Contractors	2,101	964	(1,137)	-54.1%
Other Specialty Trade Contractors	1,194	818	(376)	-31.5%
Utility System Construction	935	607	(328)	-35.1%
Building Finishing Contractors	1,017	539	(478)	-47.0%
Residential Building Construction	845	520	(325)	-38.5%
Nonresidential Building Construction	412	438	26	6.3%
Highway, Street, and Bridge Construction	427	347	(80)	-18.7%
Land Subdivision	231	126	(105)	-45.5%
Other Heavy and Civil Engineering Construction	35	43	8	22.9%

This table shows total employment in the county in 2007 and 2010, and the change in employment between 2007 and 2010, by industry sector.

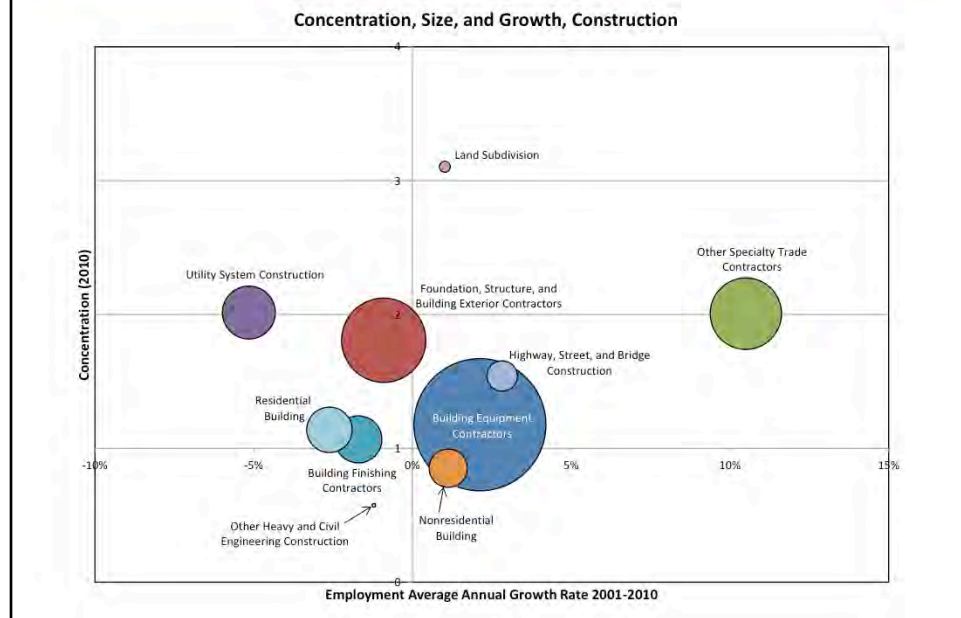


## FLORIDA: SARASOTA COUNTY



For sub-sectors within this industry, this chart shows average annual employment growth rate along the horizontal axis and the level of employment concentration along the vertical axis (a value higher than 1.0 means that a higher proportion of people work in that industry in the county than in the nation as a whole). The size of the bubble is proportional to the number of people employed in that industry.

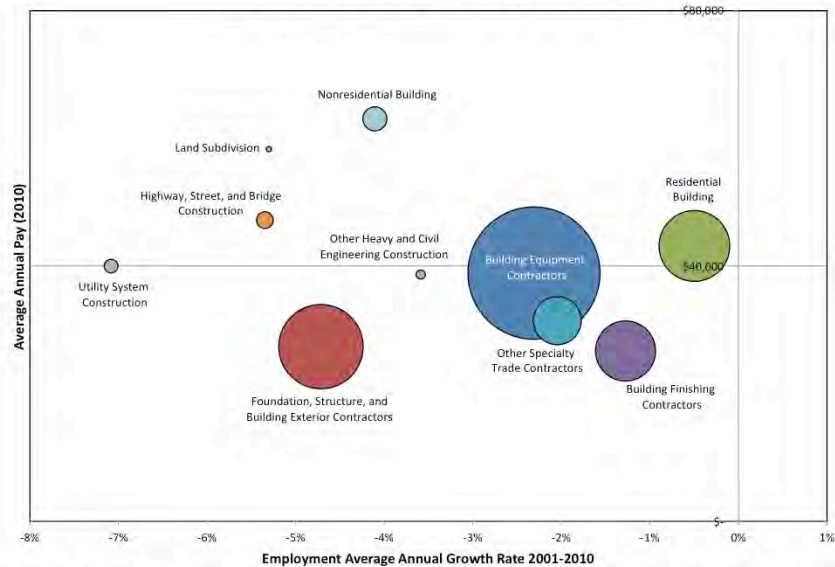
## FLORIDA: MANATEE COUNTY



For sub-sectors within this industry, this chart shows average annual employment growth rate along the horizontal axis and the level of employment concentration along the vertical axis (a value higher than 1.0 means that a higher proportion of people work in that industry in the county than in the nation as a whole). The size of the bubble is proportional to the number of people employed in that industry.

## FLORIDA: SARASOTA COUNTY

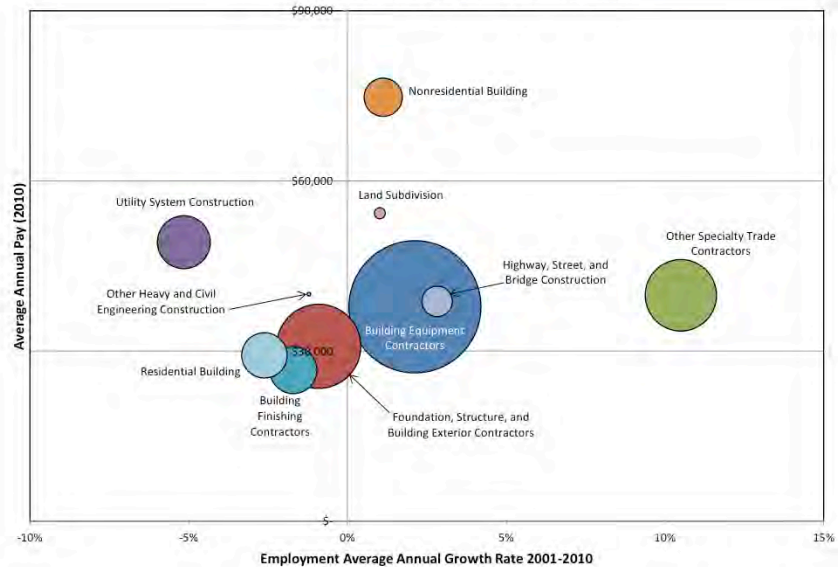
Annual Average Pay, Size, and Growth, Construction



For sub-sectors within this industry, this chart shows average annual employment growth rate between 2001 and 2010 along the horizontal axis and the average annual pay in 2010 along the vertical axis. The size of the bubble is proportional to the number of people employed in that industry.

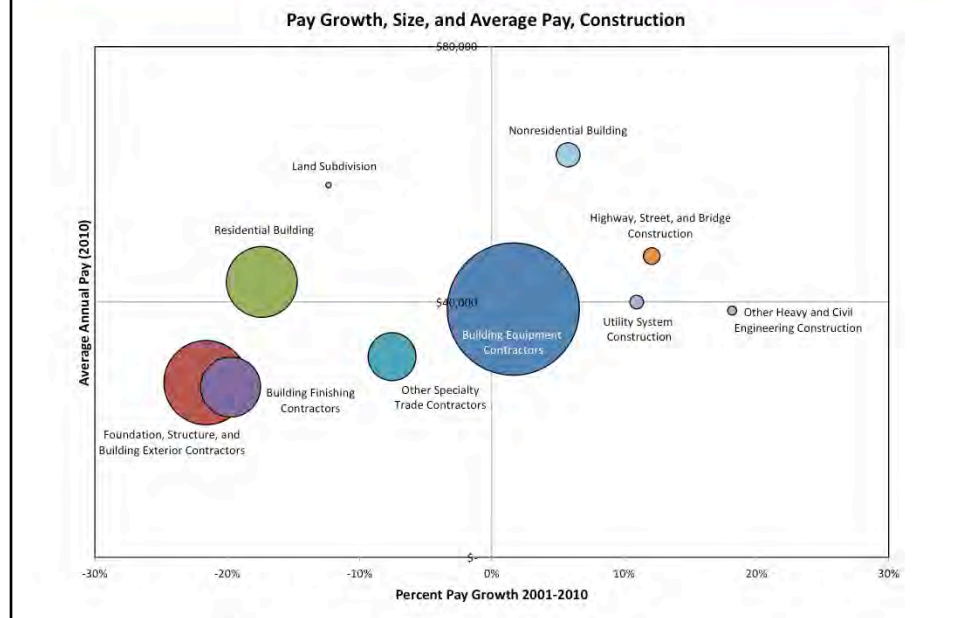
## FLORIDA: MANATEE COUNTY

Annual Average Pay, Size, and Growth, Construction



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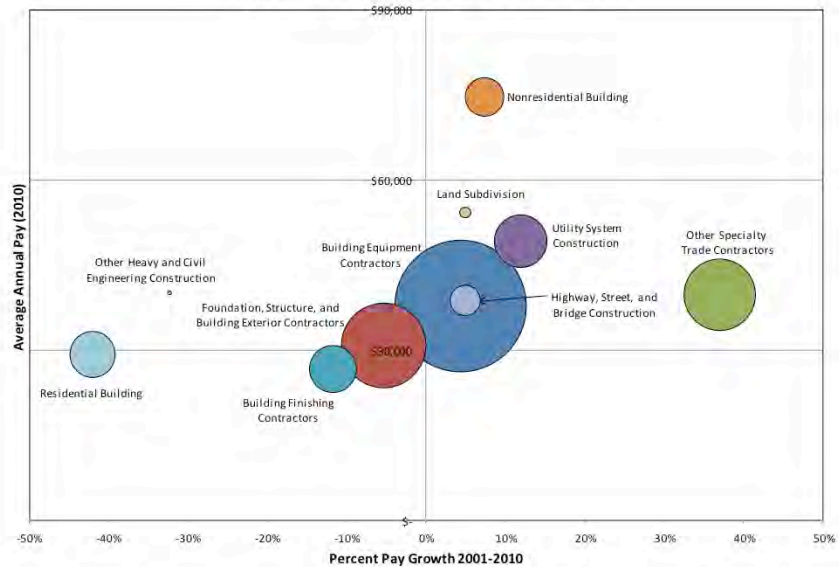
## FLORIDA: SARASOTA COUNTY



For sub-sectors within this industry, this chart shows the total percent increase in inflation-adjusted average annual pay between 2001 and 2010 along the horizontal axis and the average annual pay in 2010 along the vertical axis. The size of the bubble is proportional to the number of people employed in that industry.

## FLORIDA: MANATEE COUNTY

Pay Growth, Size, and Average Pay, Construction



For sub-sectors within this industry, this chart shows the total percent increase in inflation-adjusted average annual pay between 2001 and 2010 along the horizontal axis and the average annual pay in 2010 along the vertical axis. The size of the bubble is proportional to the number of people employed in that industry.



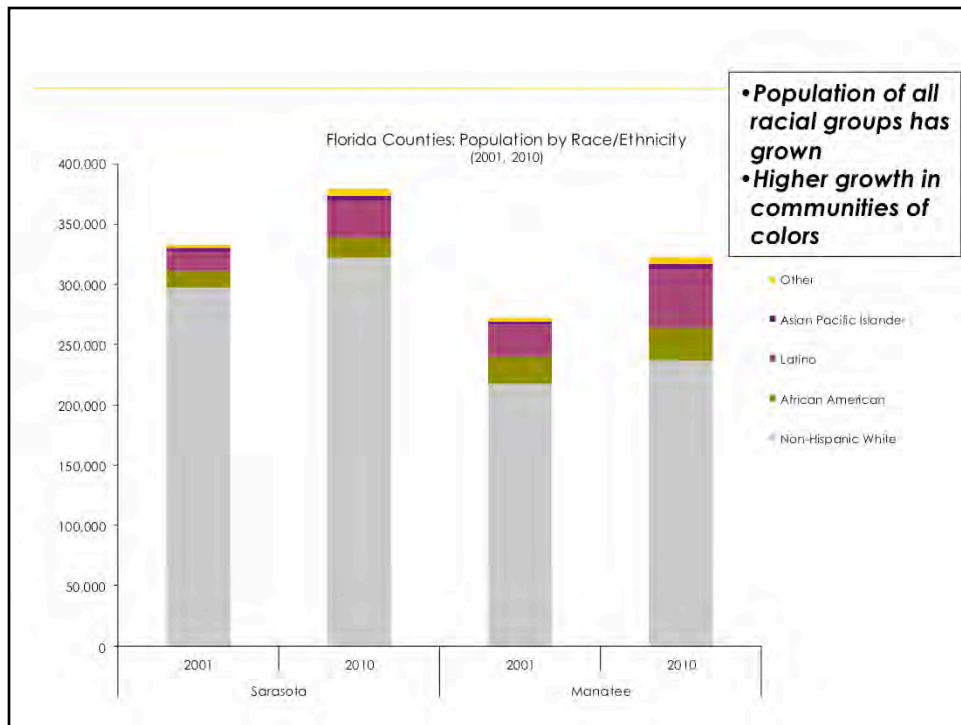
## DEMOGRAPHICS

## Demographics-Key points

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- Growing diversity, especially in Manatee County
- Large portion of people born elsewhere
- High levels of irregular work
- Notice differences in racial structure of employment in healthcare support occupations vs. healthcare practitioners and technical occupations
- Notice entry-level and career ladder opportunities in various sectors/occupational groupings, including:
  - Health care
  - Retail/Sales and perhaps accommodation & food svcs.

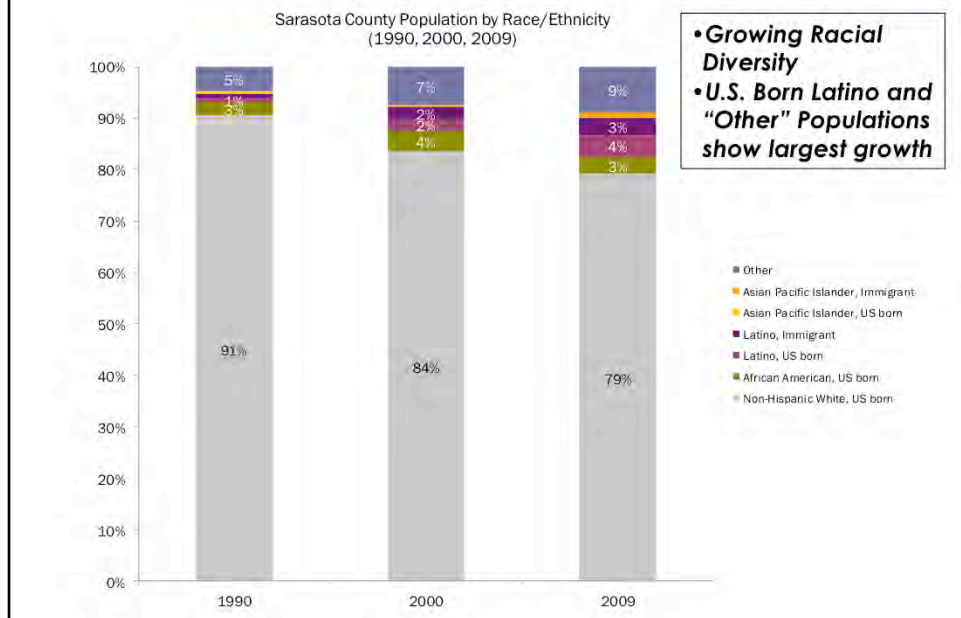




This chart compares the total population by race/ethnicity of the counties in the region, in both 2000 and 2010 [1].

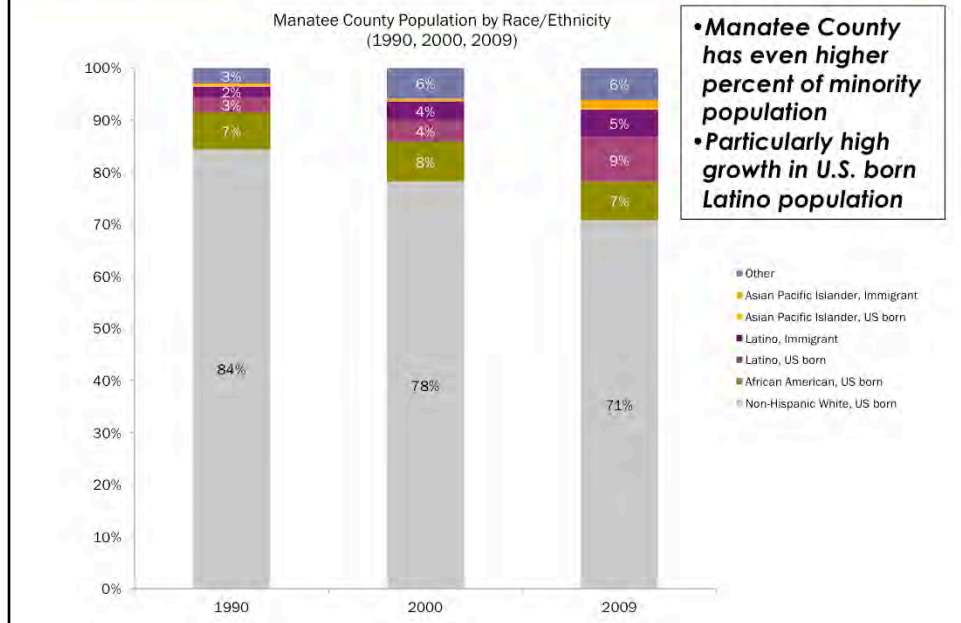
[1] 2001 data from U.S. Census, Population Division: County Characteristics Resident Population Estimates File, released August 7, 2008. 2010 data from 2010 Census Redistricting File (PL 94-171).

## FLORIDA: SARASOTA COUNTY

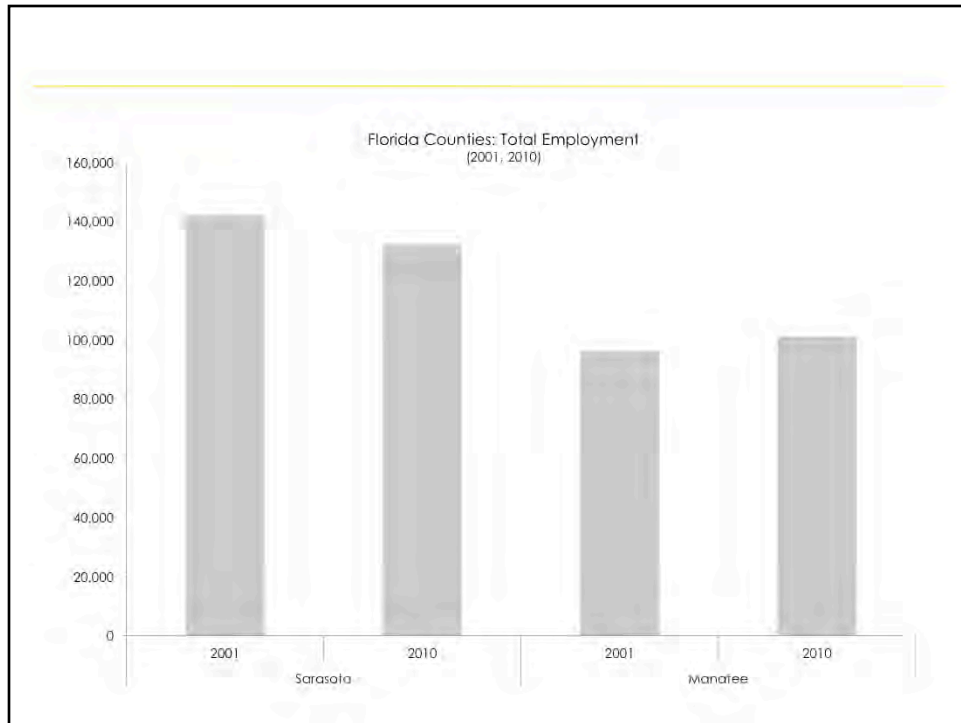


This chart shows total county population by race/ethnicity, and how it changed from 1990 to 2009.

## FLORIDA: MANATEE COUNTY

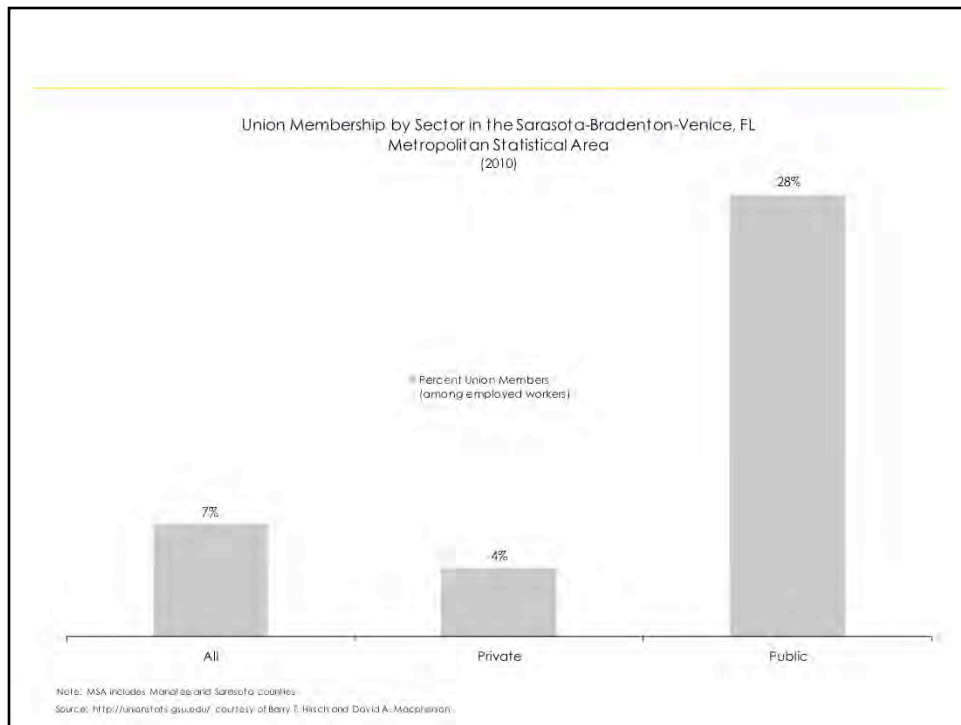


This chart shows total county population by race/ethnicity, and how it changed from 1990 to 2009.



This chart compares total employment of the counties in the region, in both 2001 and 2010 [1].

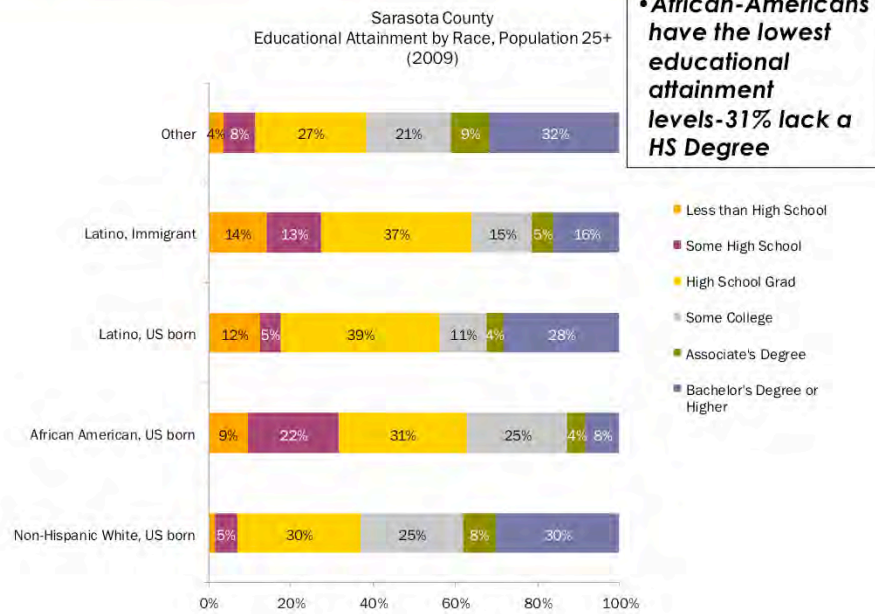
[1] From Bureau of Labor Statistics, Quarterly Census of Employment and Wages.



This chart shows union membership rates in the metropolitan region in 2010, for private sector employment, public sector employment, and for all employed workers [1].

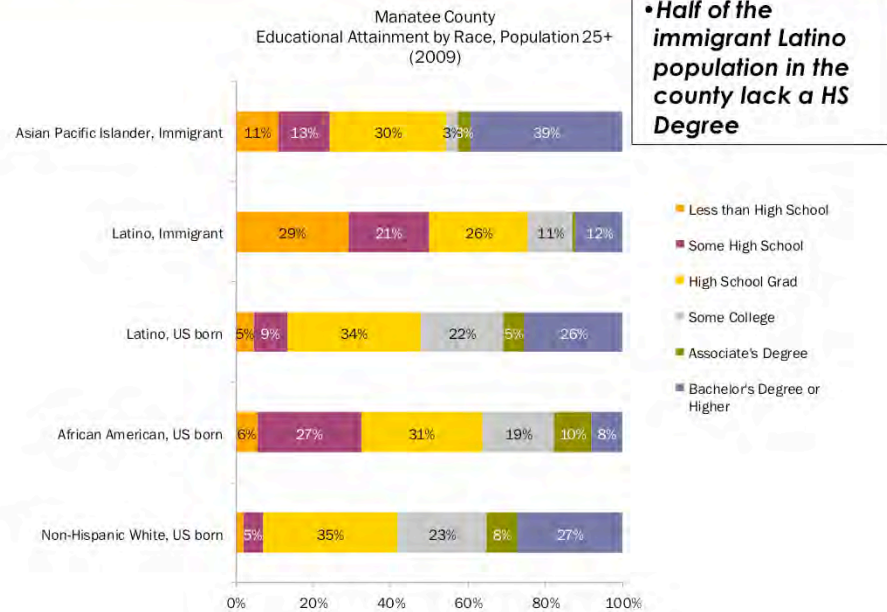
[1] From <http://unionstats.gsu.edu/>, courtesy of Barry T. Hirsch and David A. Macpherson.

## FLORIDA: SARASOTA COUNTY

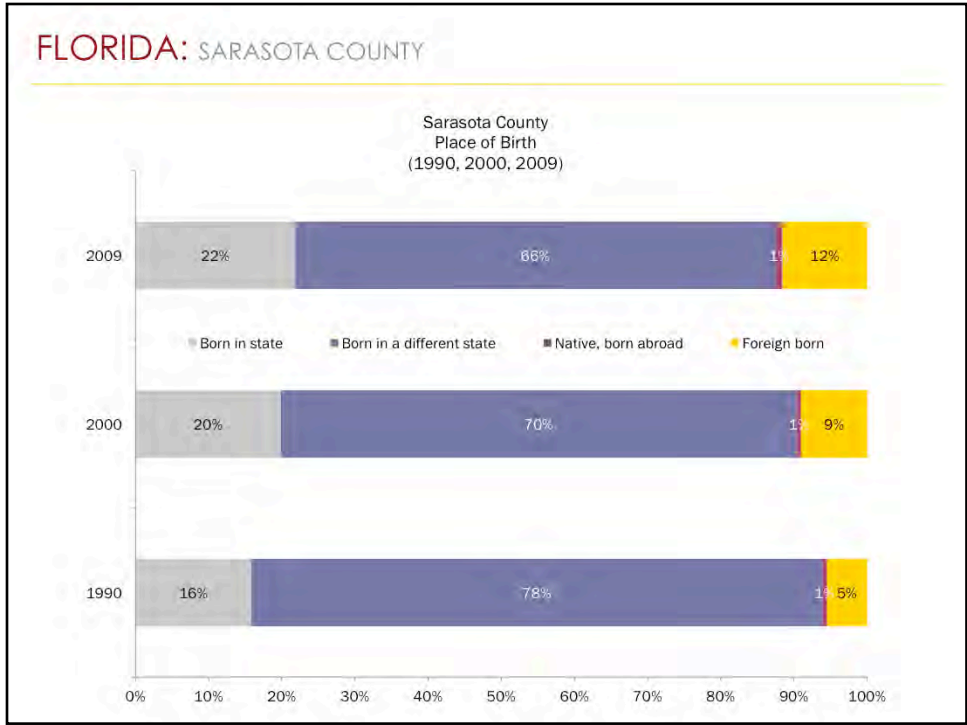


Educational attainment differs significantly by race, as shown in this chart which looks at educational attainment by race in 2009.

## FLORIDA: MANATEE COUNTY



Educational attainment differs significantly by race, as shown in this chart which looks at educational attainment by race in 2009.



This chart shows the population of the county by place of birth, in 1990, 2000 and 2009.

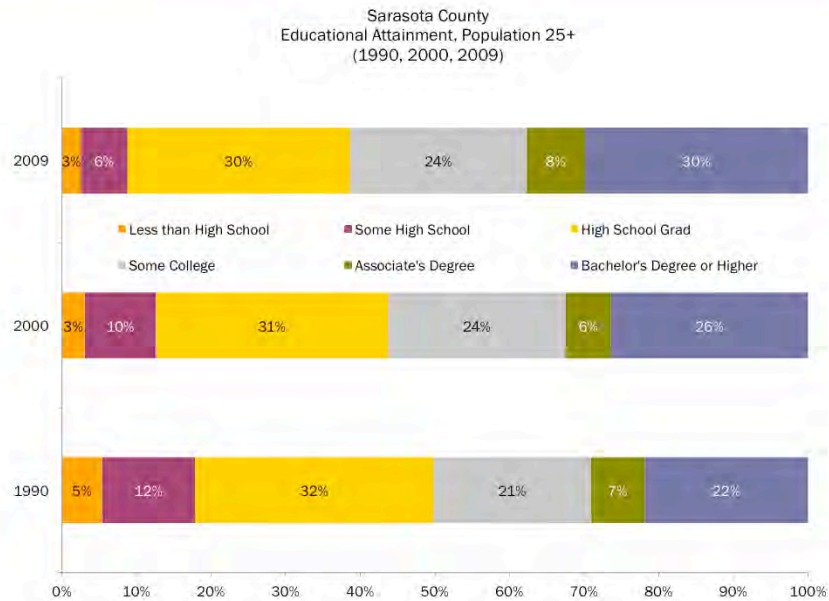


## FLORIDA: MANATEE COUNTY



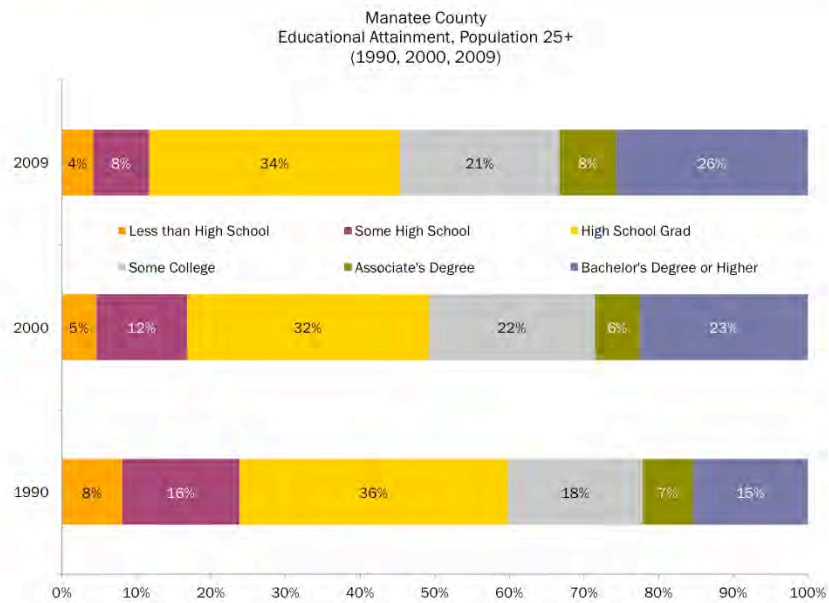
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## FLORIDA: SARASOTA COUNTY



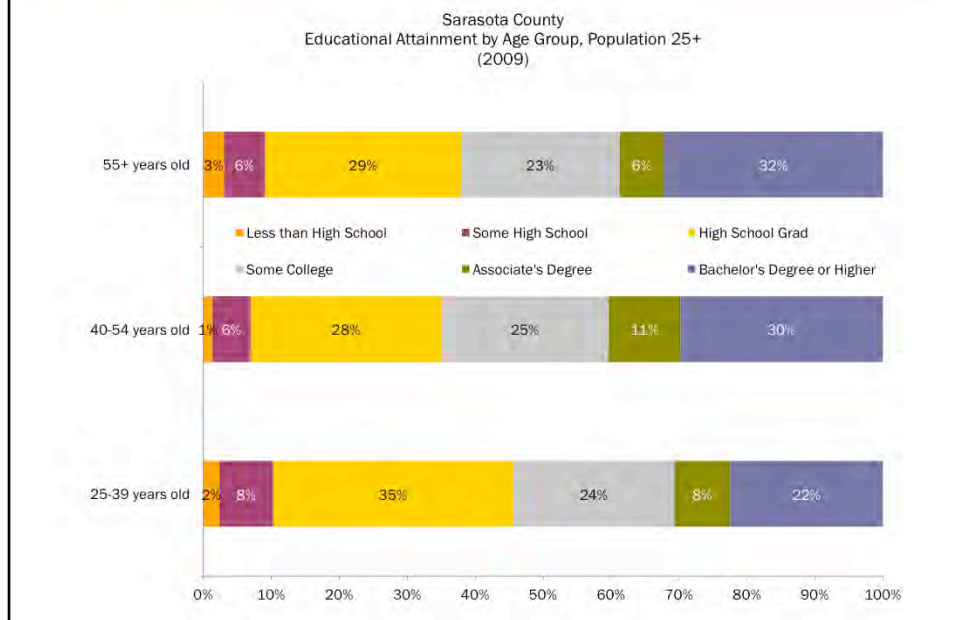
This chart shows the overall educational attainment of the adult population aged 25 years and older, in 1990, 2000 and 2009.

## FLORIDA: MANATEE COUNTY



This chart shows the overall educational attainment of the adult population aged 25 years and older, in 1990, 2000 and 2009

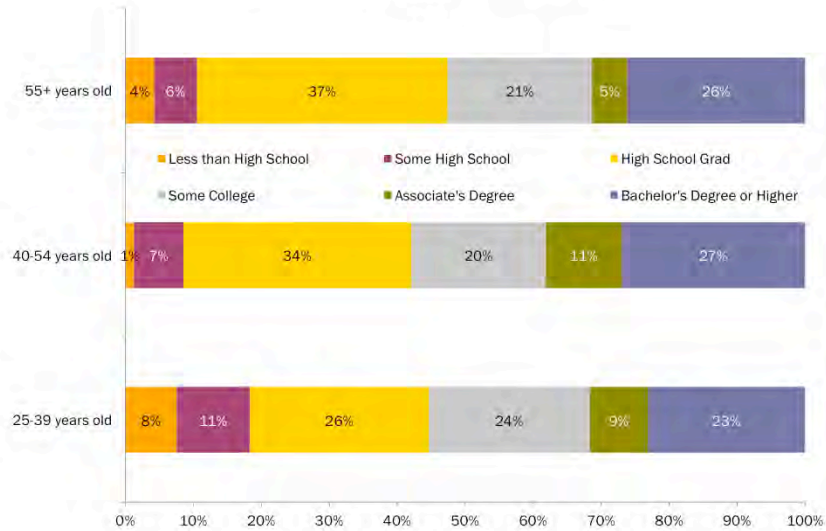
## FLORIDA: SARASOTA COUNTY



Educational differs somewhat by age, as shown in this graph which looks at educational attainment by age group in 2009.

## FLORIDA: MANATEE COUNTY

Manatee County  
Educational Attainment by Age Group, Population 25+  
(2009)



Educational differs somewhat by age, as shown in this graph which looks at educational attainment by age group in 2009.

## Employment demographics

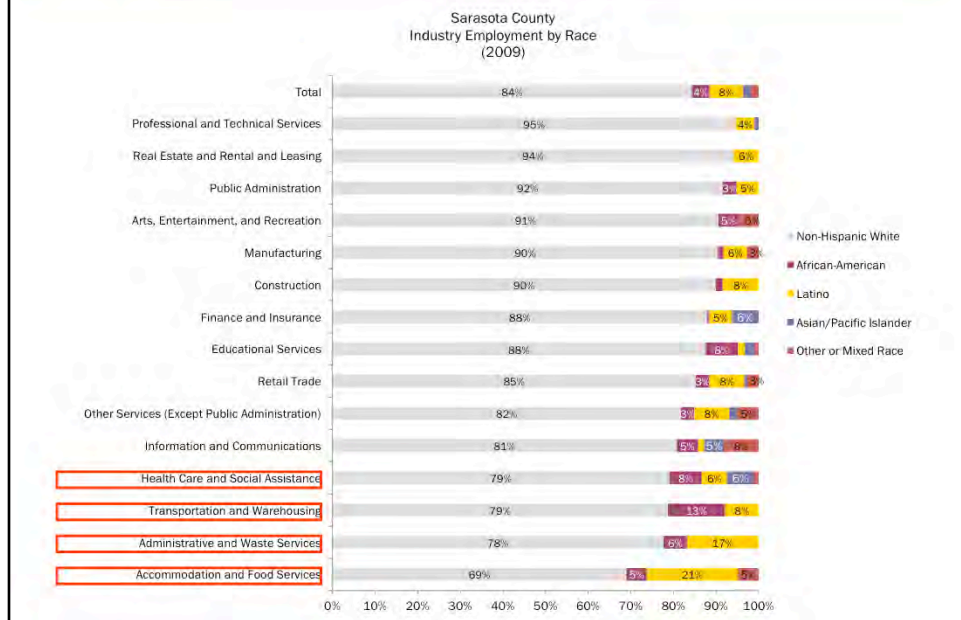
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- Examining demographic characteristics of employees by industry and occupation provides important clues about career opportunities for particular target populations
- Following slides examine employment patterns by race and age

## Industry employment by race

- In Sarasota County, industries with the highest level of racial diversity include:
  - *Accommodation and Food Service (31% non-white)*
  - *Administrative and waste services (22%)*
  - *Transportation and warehousing (21%)*
  - *Health care and social assistance (21%)*
- Dramatic shift in manufacturing employment, from 33% non-white in 2007 to 10% non-white in 2009.
  - *Likely related to major decline in fabricated metal products manufacturing, particularly Metal Window and Door Manufacturing (NAICS 332321)*
- Latino population disproportionately employed in Accommodation/Food Services, Administrative Services, Retail and construction industries
- African-American population disproportionately employed in transportation and warehousing

## FLORIDA: SARASOTA COUNTY



These inequalities in educational attainment directly relate to inequalities in the labor market, as shown in this graph and the next one. The racial composition of the workforce in any particular industry or occupation also differs dramatically.



## Industry employment by race

---

- In Manatee County, industries with the highest level of racial diversity include:
  - Accommodation and food services (41%)
  - Construction (35%)
  - Administrative and Waste Services (29%)
  - Health care and social assistance (28%)
- Shift in Transportation and warehousing employment, from 39% non-white in 2007 to 23% in 2009
  - Total employment in this industry is small, though, so could just be statistical error
- Latino population disproportionately employed in Administrative and Waste Services, Construction, Arts/entertainment/recreation, and Wholesale industries
- African-American population disproportionately employed in Accommodation and food services, health care and educational services

## FLORIDA: MANATEE COUNTY



These inequalities in educational attainment directly relate to inequalities in the labor market, as shown in this graph and the next one. The racial composition of the workforce in any particular industry or occupation also differs dramatically.

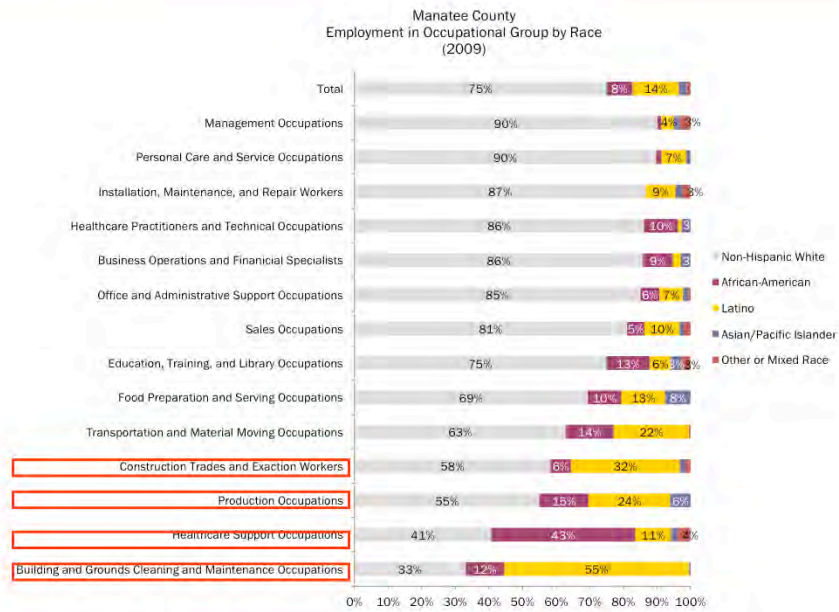
# Occupational employment by race

- Occupations with the highest levels of racial diversity include:
  - In Sarasota County:
    - *Food Preparation and Serving Occupations* (27% non-white)
    - *Health care support occupations* (31%)
    - *Building and grounds cleaning and maintenance occupations* (28%)
    - *Production occupations* (23%)
    - *Personal care and service occupations* experienced major shift (26% in 2007 to 11% in 2009 )
  - In Manatee County
    - *Buildings and Grounds Cleaning and Maintenance* (67%)
    - *Health care Support occupations* (59%, up from 48%)
    - *Production Occupations* (45%)
    - *Construction Trades* (42%)
- Health care support occupations include a significantly more diverse population than health care practitioners and technical occupations→ potential for improving career opportunities for disadvantaged populations through a focus on health care careers.
- Health care support occupations also have the highest proportion of African-Americans in the workforce in both counties; over 40% of the workforce in health care support occupations in Manatee County are African-American.

## FLORIDA: SARASOTA COUNTY



## FLORIDA: MANATEE COUNTY



# Industry age structure

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- Industries with large shares of employees over age 55 may provide opportunities for new entrants as older employees begin to retire.
- Industries with relatively high shares of workers 55 years of age or older include:
  - Sarasota County:
    - *Real estate and rental and leasing* (58 percent of the workforce 55 years of age or older);
    - *Transportation and warehousing* (49 percent),
    - *Professional and Technical Services* (46 percent); and
    - *Finance and insurance* (43 percent).
  - Manatee County:
    - *Educational services* (34 percent);
    - *Public Administration* (33 percent),
    - *Manufacturing* (31 percent); and
    - *Health care and social assistance* (30 percent).

## FLORIDA: SARASOTA COUNTY



Though all (or nearly all) industries and occupations have a majority of workers who are 25 to 54 years old, there is considerable variation in the age composition across industries and occupations, as shown in this graph and the next one.

## FLORIDA: MANATEE COUNTY



Though all (or nearly all) industries and occupations have a majority of workers who are 25 to 54 years old, there is considerable variation in the age composition across industries and occupations, as shown in this graph and the next one.

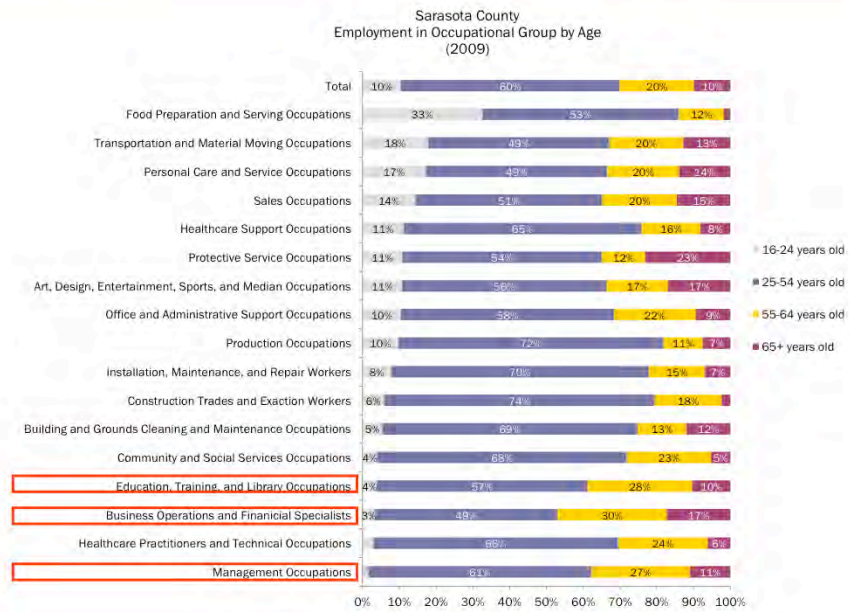


## Occupational age structure

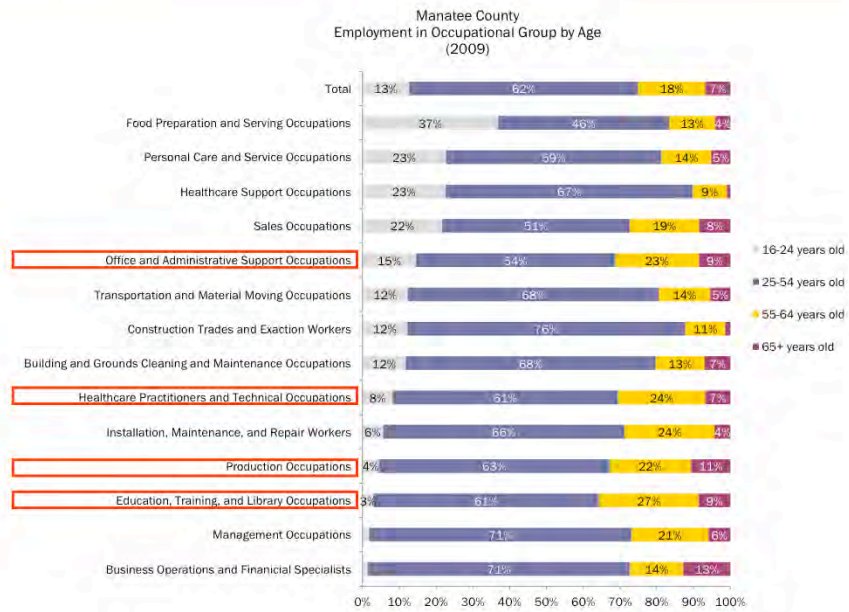
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- Occupational groupings with relatively large shares of workers over age 55 include:
  - Sarasota County:
    - *Business operations and financial specialists* (47 percent 55 years of age or older);
    - *Education, training and library occupations* (38 percent); and
    - *Management Occupations* (38 percent).
  - Manatee County:
    - *Education, training and library occupations* (36 percent);
    - *Production Occupations* (33 percent);
    - *Health care practitioners and technical occupations* (31 percent); and
    - *Office and Administrative Support Occupations* (32 percent).

## FLORIDA: SARASOTA COUNTY

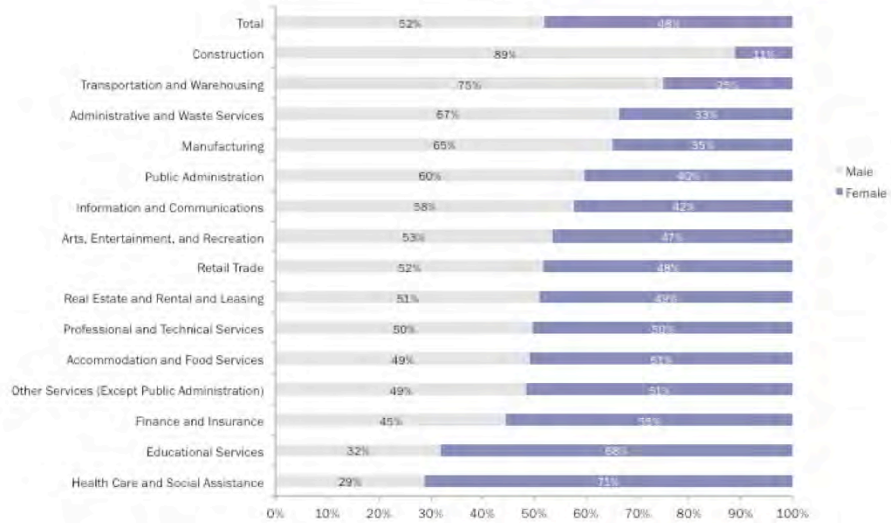


## FLORIDA: MANATEE COUNTY



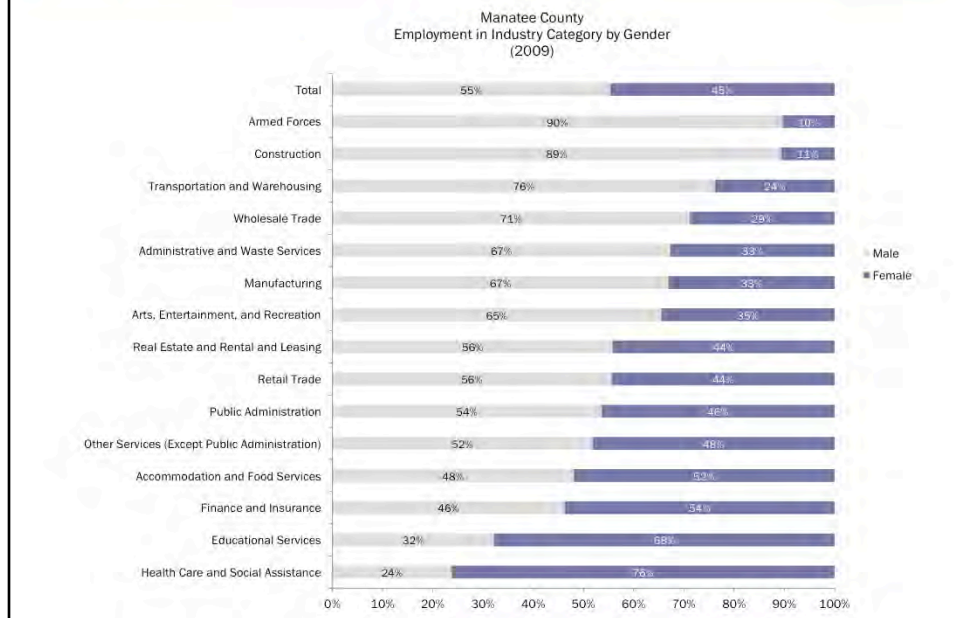
## FLORIDA: SARASOTA COUNTY

Sarasota County  
Employment in Industry Category by Gender  
(2009)



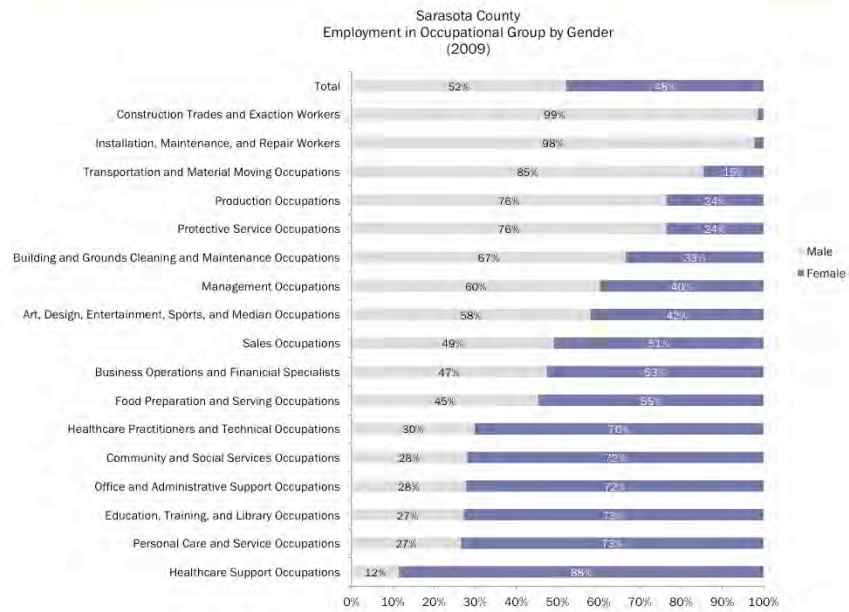
There is also considerable variation in the gender composition across industries and (even more so) occupations, as shown in this graph and the next one.

## FLORIDA: MANATEE COUNTY

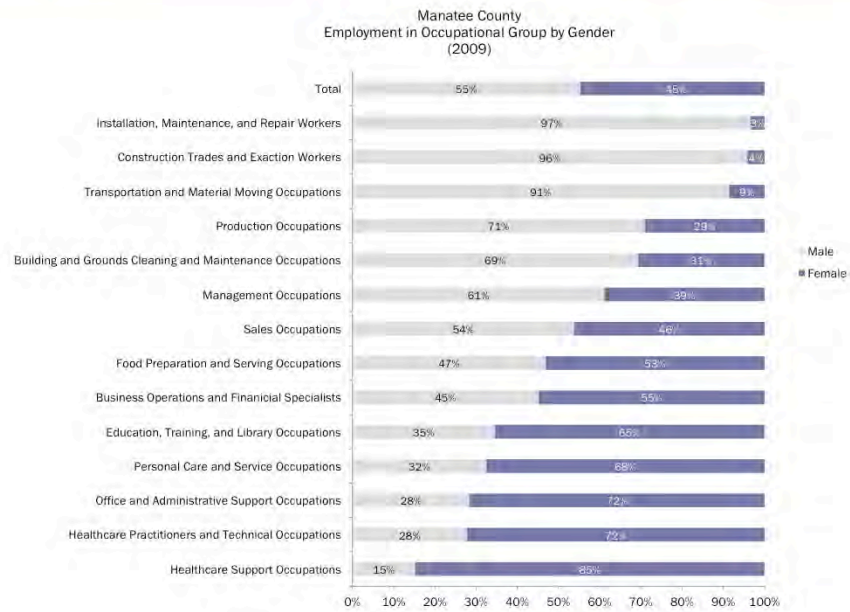


There is also considerable variation in the gender composition across industries and (even more so) occupations, as shown in this graph and the next one.

## FLORIDA: SARASOTA COUNTY



## FLORIDA: MANATEE COUNTY



## Identifying career opportunities

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- Goal is to identify not just good jobs, but also career advancement opportunities.
- One indicator of this is industries and occupations that have both a range of educational attainment levels and a large share of workers with Associates' degrees.
- This suggests that the industry hires workers with mid-level skills, and that there are advancement opportunities

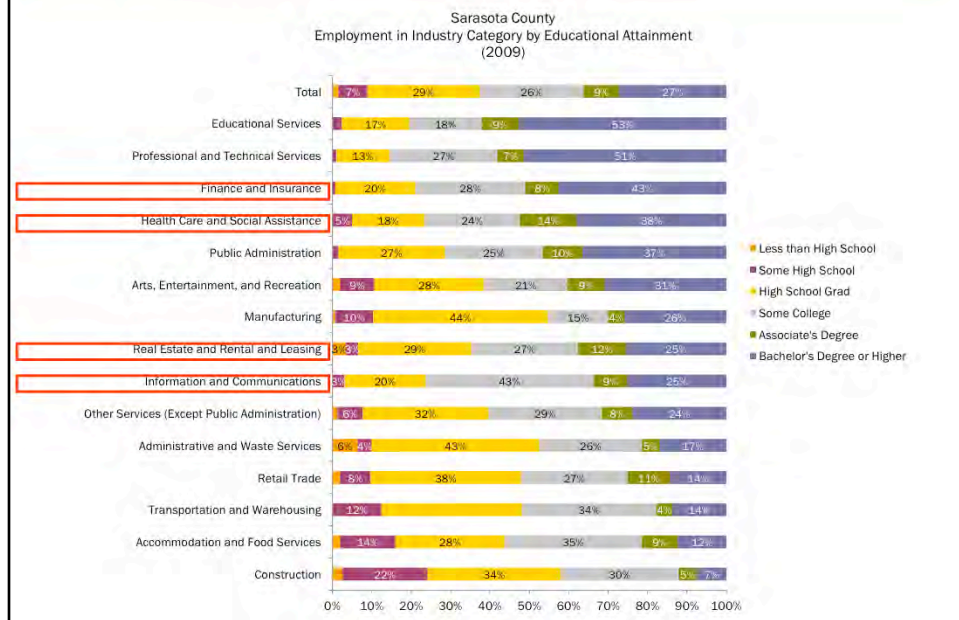


## Identifying career opportunities

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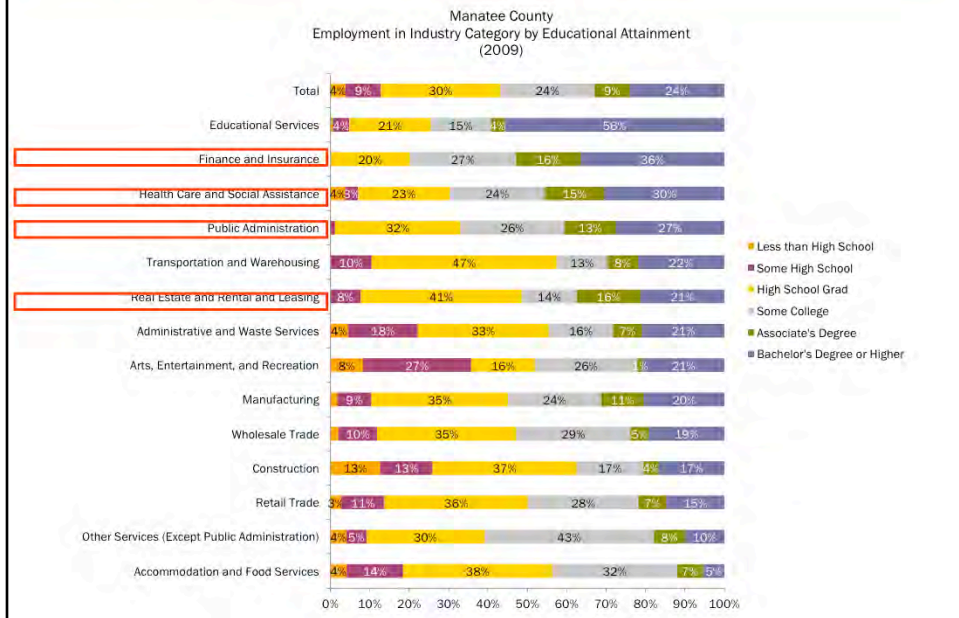
- Industries with both significant entry-level positions and advancement opportunities include:
  - Sarasota County:
    - *Finance and insurance (57 percent of employees have less than a Bachelor's degree, including 8 percent with an Associate's degree);*
    - *Health care and social assistance (62 percent and 14 percent);*
    - *Real estate, rental and leasing (75 percent and 12 percent); and*
    - *Information and communications (75 percent and 9 percent).*
  - Manatee County:
    - *Health care and social assistance (70 percent and 15 percent);*
    - *Finance and Insurance (64 percent and 16 percent)*
    - *Real Estate and Rental and Leasing (79 percent and 16 percent); and*
    - *Public administration (73 percent and 13 percent); and*

## FLORIDA: SARASOTA COUNTY



Employees with different levels of educational attainment tend to be concentrated in very different industries and occupations, as shown in this graph and the next one.

## FLORIDA: MANATEE COUNTY



Employees with different levels of educational attainment tend to be concentrated in very different industries and occupations, as shown in this graph and the next one.

## Identifying career opportunities

---

- Occupational groupings with both significant entry-level positions and advancement opportunities include:
  - Sarasota County:
    - *Health care practitioners and technical occupations (47 percent have less than a Bachelor's degree including 22 percent with an Associate's degree);*
    - *Art, Design, Entertainment, Sports and Median Occupations (65 percent and 11 percent); and*
    - *Management Occupations (55 percent and 11 percent).*
  - Manatee County:
    - *Health care practitioners and technical occupations (50 percent and 26 percent);*
    - *Management occupations (57 percent and 15 percent).*

## FLORIDA: SARASOTA COUNTY

Sarasota County  
Employment in Occupational Group by Educational Attainment  
(2009)



## FLORIDA: MANATEE COUNTY

Manatee County  
Employment in Occupational Group by Educational Attainment  
(2009)



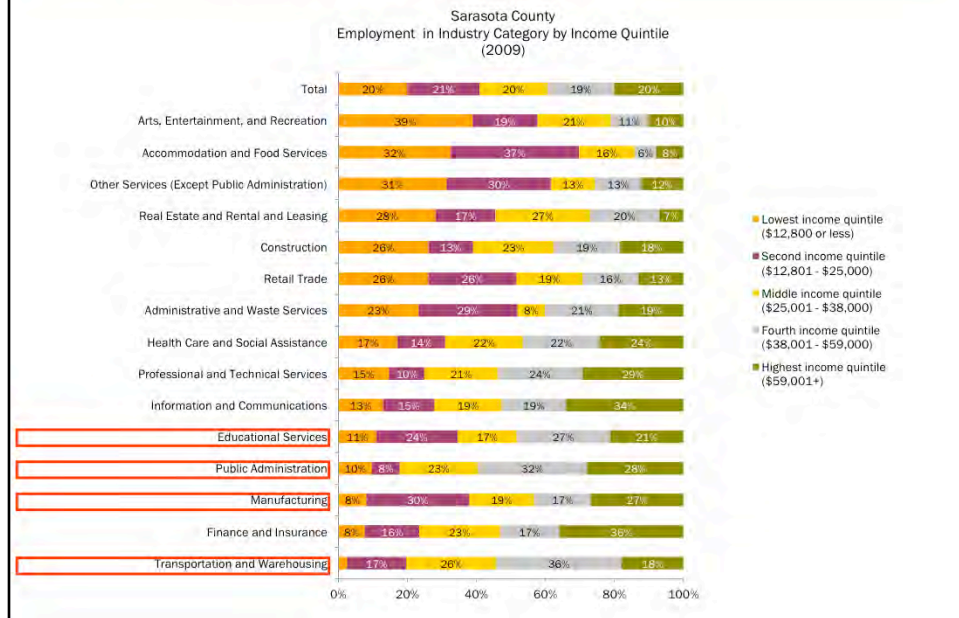
# Identifying career opportunities

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- Another indicator of career opportunities is an industry or occupation with a large percentage of middle wage earners and less than 25 percent of employees earning in the lowest income quintile.
- Industries that meet these criteria include:
  - Sarasota County:
    - *Transportation and warehousing (79 percent percent of employees in the three middle income quintiles);*
    - *Educational Services (68 percent);*
    - *Manufacturing (66 percent);*
    - *Public administration (63 percent).*
  - Manatee County:
    - *Transportation and Warehousing (73 percent)*
    - *Administrative and Waste Services (68 percent)*
    - *Health care and social assistance (63 percent);*
    - *Educational Services (62 percent)*
    - *Finance and Insurance (61 percent).*



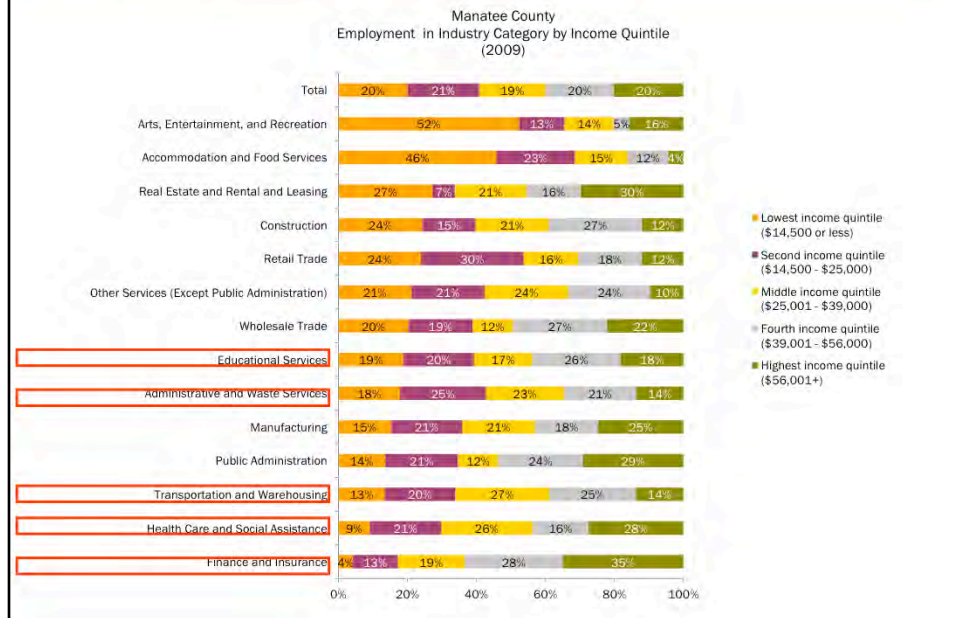
## FLORIDA: SARASOTA COUNTY



There is also substantially different distributions of income earned from work across industries and occupations, as shown in this graph and the next one.



## FLORIDA: MANATEE COUNTY



There is also substantially different distributions of income earned from work across industries and occupations, as shown in this graph and the next one.

# Identifying career opportunities

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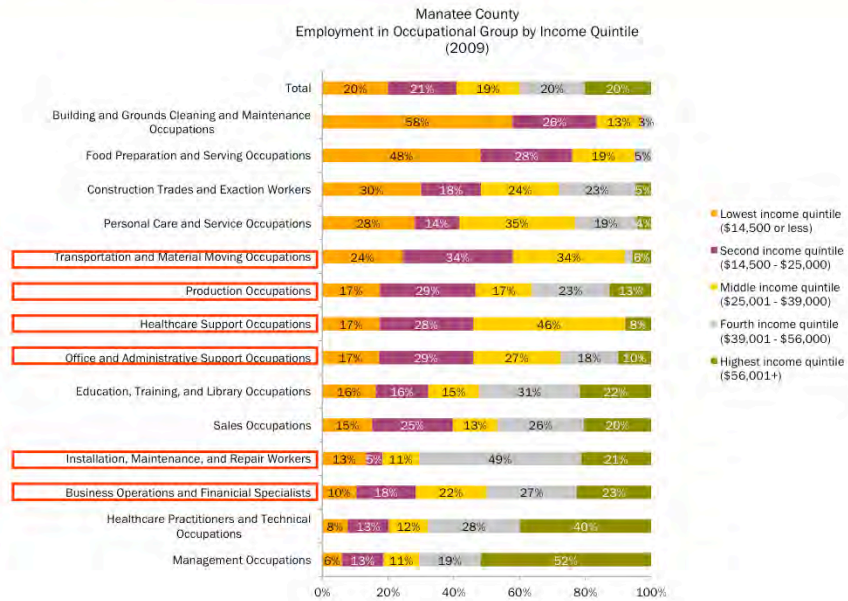
- Promising occupational groupings, based on this analysis of income distribution, include:
  - Sarasota County:
    - Production Occupations (81 percent of employees in the three middle income quintiles);
    - Office and Administrative support Occupations (72 percent);
    - Installation, maintenance and repair workers (71 percent);
    - Protective Service Occupations (64 percent)
    - Community and social services occupations (63 percent)
  - Manatee County:
    - *Health care support occupations* (75 percent of employees in the three middle income quintiles)
    - Office and administrative support occupations (73 percent).
    - *Transportation and Material Moving Occupations* (70 percent)
    - *Production Occupations* (70 percent)
    - *Business Operations and Financial Specialists*
    - *Installation, Maintenance and Repair Occupations* (66 percent)

## FLORIDA: SARASOTA COUNTY

Sarasota County  
Employment in Occupational Group by Income Quintile  
(2009)



## FLORIDA: MANATEE COUNTY

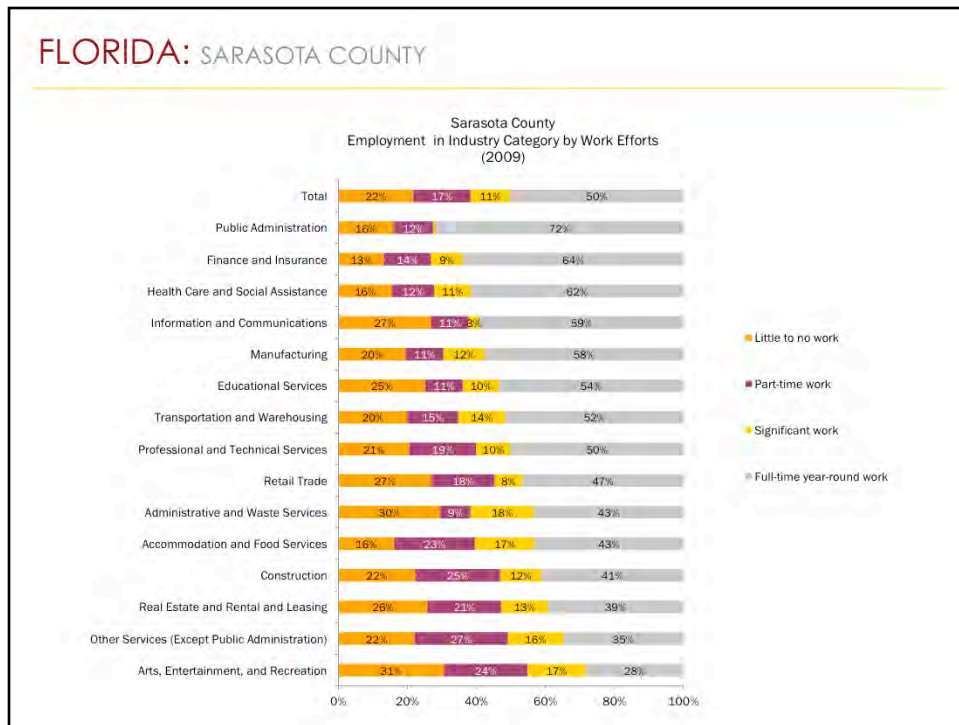


## Demographics-Key points

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- Industries that most consistently emerge in this analysis that can provide decent career opportunities, especially for the growing diverse workforce, include:
  - Health care and social assistance
  - Transportation and warehousing
- Occupations that most consistently emerge include:
  - Health care support occupations, with links to health care practitioners and technical occupations

## FLORIDA: SARASOTA COUNTY



This graph and the next show work efforts for employees of different industries and occupations. The mutually exclusive categories of work effort are defined as follows:

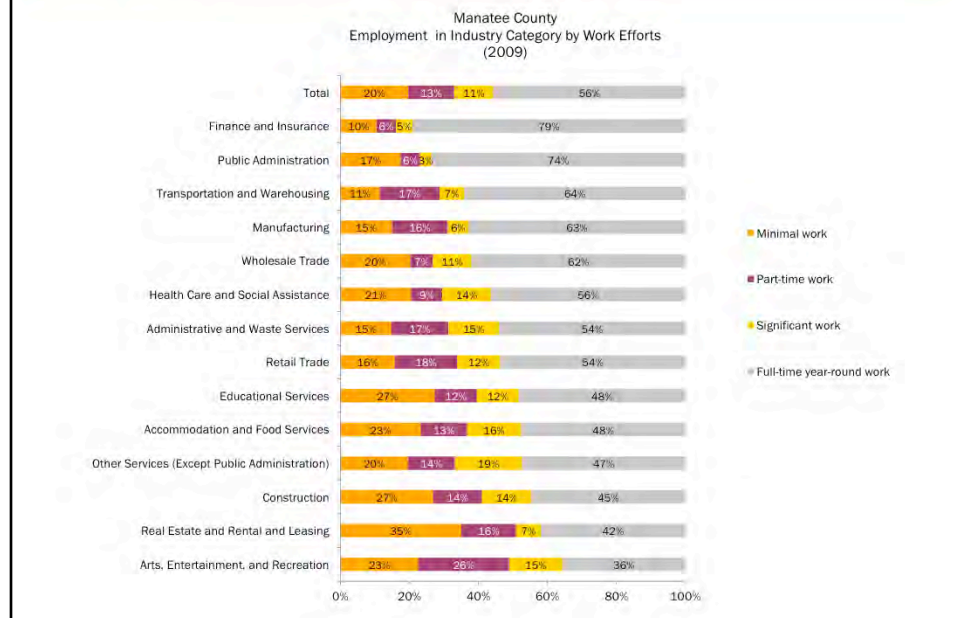
Full-time year-round work = at least 35 (usual) hours worked per week and 50 weeks during the previous year;

Significant work = at least 26 (usual) hours worked per week and 40 weeks during the previous year, but less than Full-time year-round work;

Part-time work = at least 10 (usual) hours worked per week and 14 weeks during the previous year, but less than Significant work;

Little to no work = less than Part-time work.

## FLORIDA: MANATEE COUNTY



This graph and the next show work efforts for employees of different industries and occupations. The mutually exclusive categories of work effort are defined as follows:

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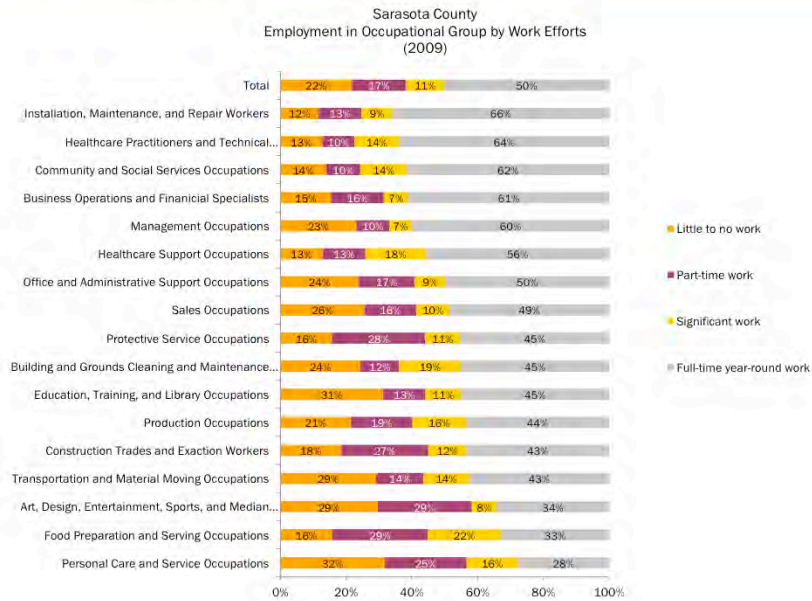
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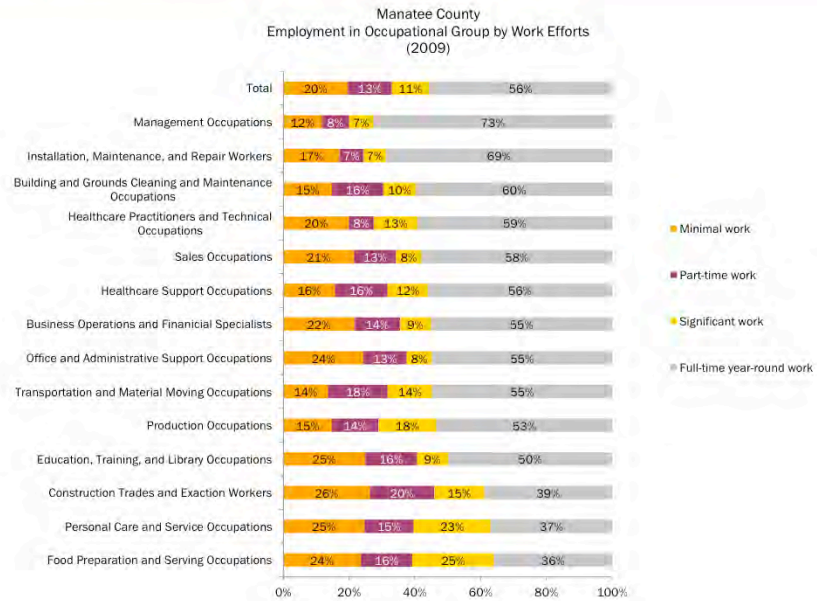


## FLORIDA: SARASOTA COUNTY

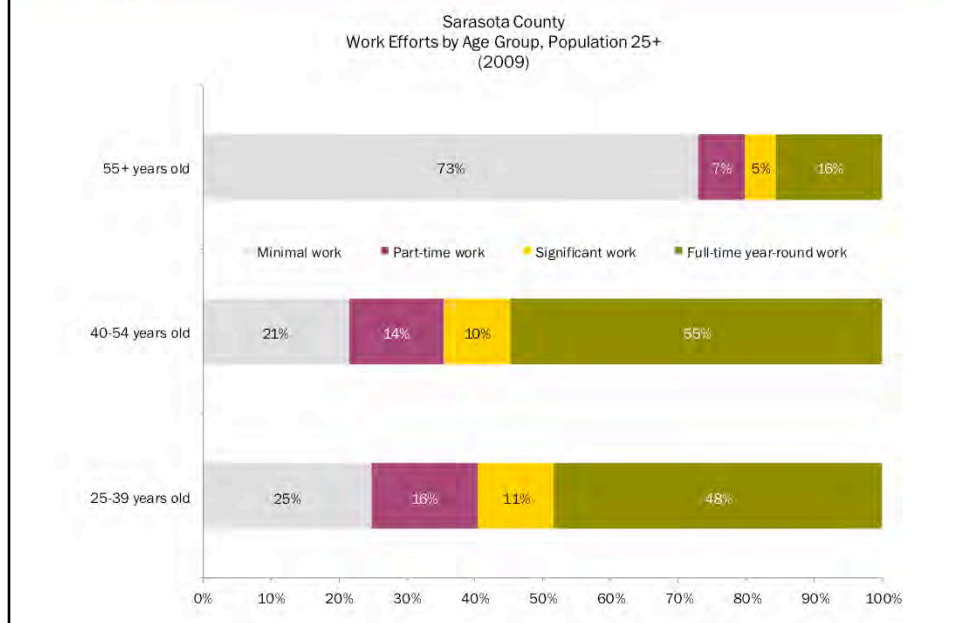




## FLORIDA: MANATEE COUNTY

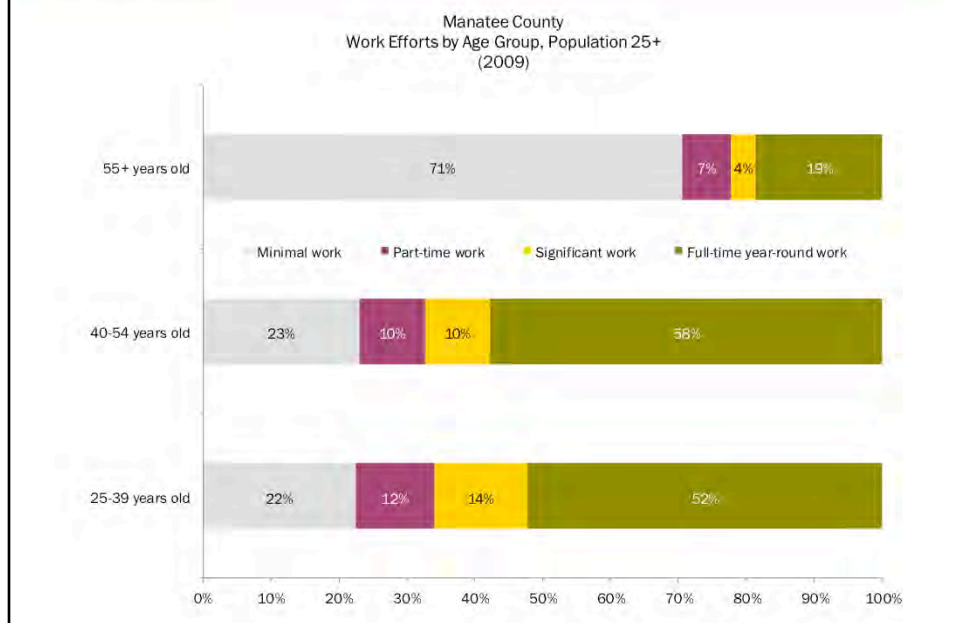


## FLORIDA: SARASOTA COUNTY



Work efforts differ by age, as shown in this graph which looks at the same categories of work effort (shown above) by age group.

## FLORIDA: MANATEE COUNTY



Work efforts differ by age, as shown in this graph which looks at the same categories of work effort (shown above) by age group.

## Workforce Development Opportunities?

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- **Health care industry**
  - Large industry, growing, decent pay in some sectors
  - Possible career ladders
    - From health care support occupations to more technical occupations within hospitals
    - Possible intermediary strategies linking home health care and community clinics to hospitals
  - Disproportionate benefits for African-American population, especially in Manatee County
- **Educational Services**
  - Rapidly growing industry and potential retirement replacements, though smaller total employment
  - Possible career ladders
    - Paraprofessionals and support staff to accelerated teacher certification programs?

## Workforce Development Opportunities?

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- Specialty manufacturing?
  - Plastics/Rubber Products, Chemical, and Miscellaneous Manufacturing in Sarasota
    - Not clear from data what the plastics/rubber or chemical products strength is—will require more nuanced local knowledge and company-level data
    - Miscellaneous manufacturing looks like Medical Equipment
  - Chemical Manufacturing and Food processing in Manatee County
    - Chemical manufacturing could be:
      - Industrial Gas Manufacturing (NAICS 325120)
      - Fertilizer (mixing only) manufacturing (NAICS 325314)
      - Pharmaceutical preparation manufacturing (NAICS 325412)
      - Paint and coating manufacturing (NAICS 325510)
      - Printing Ink Manufacturing (NAICS 325910)
    - Food processing is a large Fruit and Vegetable Canning (NAICS 311421) operation that seemingly has stabilized a bit, and pays relatively well