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

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Outline of presentation

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

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

- Sarasota County faster growth overall—fastest in the region
- Most promising growth opportunities appear in:
  - Manufacturing (esp. fabricated metal products)
  - Professional and technical services (esp. computer systems design)
- Solid employment opportunities:
  - Health care remains an important, growing sector
  - Construction growing, though can be cyclical
- Lower priorities:
  - Transportation & Warehousing shows high growth, but small employment base
  - Financial Services show less robust growth
- Career ladders exist in all studied sectors, but educational requirements and certification opportunities vary
Overall Employment
Annual Average Pay, Size, and Growth, 10 Largest Private Industries

- **Health care and social assistance**
- **Retail trade**
- **Accommodation and food services**
- **Administrative and waste services**
- **Construction**
- **Professional and technical services**
- **Manufacturing**
- **Other services, except public administration**
- **Finance and insurance**
- **Arts, entertainment and recreation**

**FLORIDA: SARASOTA COUNTY**

- **Decline in financial services employment**
- **Rapid growth in high-paying industries—good sign!**
Pay Growth, Size, and Average Pay, 10 Largest Private Industries

Even low-paying sectors are finally experiencing wage growth.

Average pay increasing across nearly all sectors.
ANALYSIS OF SUB-SECTORS
Manufacturing
Annual Average Pay, Size, and Growth, Manufacturing

3,200 jobs in 2015
Average pay: $46,800
Average pay increases across all sectors is a sign of tightening labor markets.
North Port-Sarasota-Bradenton Region
Total Employment by Establishment Size Category
Manufacturing Industry
(2007, 2014)

Decline in employment in larger establishments is a challenge, but resilience in smaller firms is a good sign.
**NORTH PORT-SARASOTA REGION:** MANUFACTURING CAREER LADDER

### Structural metal fabricators and fitters
- **Annual job openings:** 9 in 2-county region
- **Wage per hour (entry-level, median):** $15.41, $20.17
- **Required training/experience:** Postsecondary Vocational
- **% of jobs in Manufacturing industry:** 83%

### Machinists
- **Annual job openings:** 13 in 2-county region
- **Wage per hour (entry-level, median):** $12.73, $18.49
- **Required training/experience:** Postsecondary Vocational
- **% of jobs in Manufacturing industry:** 80%

### Welders, cutters, solderers, and brazers
- **Annual job openings:** 21 in 2-county region
- **Wage per hour (entry-level, median):** $11.86, $17.12
- **Required training/experience:** Postsecondary Vocational
- **% of jobs in Manufacturing industry:** 60%

### Sheet metal workers
- **Annual job openings:** 25 in 2-county region
- **Wage per hour (entry-level, median):** $13.13, $16.14
- **Required training/experience:** Postsecondary Vocational
- **% of jobs in Manufacturing industry:** 28%

### Industrial machinery mechanics
- **Annual job openings:** 20 in 2-county region
- **Wage per hour (entry-level, median):** $13.13, $19.84
- **Required training/experience:** Postsecondary Vocational
- **% of jobs in Manufacturing industry:** 53%

### Production, planning, and expediting clerks
- **Annual job openings:** 7 in 2-county region
- **Wage per hour (entry-level, median):** $15.05, $19.81
- **Required training/experience:** High School Diploma
- **% of jobs in Manufacturing industry:** 36%

### Computer-controlled machine tool operators, metal and plastic
- **Annual job openings:** 9 in 2-county region
- **Wage per hour (entry-level, median):** $14.57, $18.34
- **Required training/experience:** Postsecondary Vocational
- **% of jobs in Manufacturing industry:** 98%

### Inspectors, testers, sorters, samplers, and weighers
- **Annual job openings:** 16 in 2-county region
- **Wage per hour (entry-level, median):** $10.88, $14.63
- **Required training/experience:** High School Diploma
- **% of jobs in Manufacturing industry:** 66%

### Shipping, receiving, and traffic clerks
- **Annual job openings:** 46 in 2-county region
- **Wage per hour (entry-level, median):** $9.65, $12.83
- **Required training/experience:** Postsecondary Vocational
- **% of jobs in Manufacturing industry:** 66%

### Packers and packagers, hand
- **Annual job openings:** 39 in 2-county region
- **Wage per hour (entry-level, median):** $8.92, $9.26
- **Required training/experience:** Less than High School
- **% of jobs in Manufacturing industry:** 25%

### Welders, cutters, solderers, and brazers
- **Annual job openings:** 25 in 2-county region
- **Wage per hour (entry-level, median):** $13.13, $19.84
- **Required training/experience:** Postsecondary Vocational
- **% of jobs in Manufacturing industry:** 60%

### First-line supervisors of production and operating workers
- **Annual job openings:** 23 in 2-county region
- **Wage per hour (entry-level, median):** $19.36, $26.17
- **Required training/experience:** Postsecondary Vocational
- **% of jobs in Manufacturing industry:** 71%

### Electrical and electronic equipment assemblers
- **Annual job openings:** 7 in 2-county region
- **Wage per hour (entry-level, median):** $10.52, $13.69
- **Required training/experience:** Postsecondary Vocational
- **% of jobs in Manufacturing industry:** 82%

### Team assemblers
- **Annual job openings:** 61 in 2-county region
- **Wage per hour (entry-level, median):** $10.30, $13.49
- **Required training/experience:** High School Diploma
- **% of jobs in Manufacturing industry:** 74%

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**Note:** Good employment and career opportunities without BA Degree, though entry-level can have low wages.
ANALYSIS OF SUB-SECTORS

Information and Professional & Technical Services
1,570 jobs in 2015, up 16% a year since 2012. Average pay: $86,740

1,800 jobs in 2015, up 15% a year since 2012. Average pay: $53,260
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Pay Growth, Size, and Average Pay, Information and Prof. & Tech. Services

Average pay is increasing across most sub-sectors

Slight decline in average pay in accounting and related sub-sectors suggests less skill demand
North Port-Sarasota-Bradenton Region
Total Employment by Establishment Size Category
Information and Professional & Technical Services Industry
(2007, 2014)

Employment in the industry is distributed across many different establishment sizes. Reflects diversity and likely less vulnerability to fortunes of individual firms.
ANALYSIS OF SUB-SECTORS

Health Care
FLORIDA: SARASOTA COUNTY

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

6,810 jobs in 2015, up 3% a year since 2012
Average annual pay: $55,191

Growth across nearly all sectors of the industry, but more rapid growth in outpatient, community care and home health care services, with lower wages

4,210 jobs in 2015, up 4% a year since 2012
Average annual pay: $26,910

2,880 jobs in 2015, up 9% a year since 2012
Average annual pay: $29,834
Pay Growth, Size, and Average Pay, Health and Social Assistance

- **Pay has increased substantially in hospitals and nursing care facilities**
- **Pay has declined or been stagnant in home health care, community care, and physicians’ offices**

### Average Annual Pay (2015)
- **$80,000**
- **$40,000**

### Percent Pay Growth, 2012-2015
- **-5%**
- **0%**
- **5%**
- **10%**
- **15%**
- **20%**

### FLORIDA: SARASOTA COUNTY

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

Pay has increased substantially in hospitals and nursing care facilities.
North Port-Sarasota-Bradenton Region
Total Employment by Establishment Size Category
Health Care & Social Assistance Industry
(2007, 2014)

- Jobs are mostly in mid-to-large-size establishments, with largest growth in 100-499 employee establishments.
ANALYSIS OF SUB-SECTORS

Construction
Annual Average Pay, Size, and Growth, Construction

Decent growth across all sub-sectors

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Average Annual Pay (2015)

Employment Average Annual Growth Rate, 2012-2015

-30% -10% 10% 30% 50% 70% 90%

$0 $50,000 $100,000

Highway, Street, and Bridge Construction
Utility System Construction
Nonresidential Building
Residential Building
Building Equipment Contractors
Foundation, Structure, and Building Exterior Contractors
Building Finishing Contractors
Other Specialty Trade Contractors
Other Heavy and Civil Engineering Construction
Land Subdivision
Increases in average pay across nearly all subsectors
North Port-Sarasota-Bradenton Region
Total Employment by Establishment Size Category
Construction Industry
(2007, 2014)

Jobs are mostly in small- to mid-size establishments
Sarasota County Population by Race/Ethnicity
(1990, 2000, 2014)

Increasing race and ethnic diversity across the region
**FLORIDA: SARASOTA COUNTY**

**Employment by race differs substantially across different industries—worth considering**

<table>
<thead>
<tr>
<th>Industry Category</th>
<th>Non-Hispanic White</th>
<th>African-American</th>
<th>Latino</th>
<th>Asian/Pacific Islander</th>
<th>Other or Mixed Race</th>
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<tbody>
<tr>
<td>Total</td>
<td>81%</td>
<td>5%</td>
<td>10%</td>
<td>2%</td>
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<tr>
<td>Real Estate and Rental and Leasing</td>
<td>98%</td>
<td>2%</td>
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<tr>
<td>Information and Communications</td>
<td>98%</td>
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<td>Arts, Entertainment, and Recreation</td>
<td>94%</td>
<td>4%</td>
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<tr>
<td>Public Administration</td>
<td>92%</td>
<td>4%</td>
<td>3%</td>
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</tr>
<tr>
<td>Finance and Insurance</td>
<td>91%</td>
<td>4%</td>
<td>5%</td>
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<td>Educational Services</td>
<td>87%</td>
<td>3%</td>
<td>0%</td>
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<td>Transportation and Warehousing</td>
<td>86%</td>
<td>7%</td>
<td>7%</td>
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<td>Professional and Technical Services</td>
<td>85%</td>
<td>8%</td>
<td>7%</td>
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<td>Retail Trade</td>
<td>84%</td>
<td>4%</td>
<td>10%</td>
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<td>Manufacturing</td>
<td>80%</td>
<td>18%</td>
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<tr>
<td>Construction</td>
<td>80%</td>
<td>16%</td>
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<td>Administrative and Waste Services</td>
<td>78%</td>
<td>10%</td>
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<td>Health Care and Social Assistance</td>
<td>75%</td>
<td>7%</td>
<td>11%</td>
<td>4%</td>
<td>3%</td>
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<td>Other Services (Except Public Administration)</td>
<td>75%</td>
<td>5%</td>
<td>14%</td>
<td>5%</td>
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<tr>
<td>Accommodation and Food Services</td>
<td>67%</td>
<td>11%</td>
<td>14%</td>
<td>5%</td>
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<tr>
<td>Wholesale Trade</td>
<td>66%</td>
<td>5%</td>
<td>24%</td>
<td>4%</td>
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</table>

**Sarasota County Industry Employment by Race (2014)**
Concluding Points

• Data analysis can be complement to, not substitute for, more in-depth local analysis

• Most promising economic growth potential:
  – Manufacturing
    • Esp. fabricated metal products & transportation equipment
    • More growth in Sarasota and Hillsborough counties
  – Professional and technical services
    • Computer systems design, technical consulting
    • Not so much software
    • Hillsborough County has largest concentration, though dominated by large (500+ enterprises)
    • Sarasota has more medium-sized establishments and enterprises

• Continued employment opportunities in health care and construction
Concluding Points

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

• Overall average payrolls across all sectors have been rising since 2012—good sign!