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

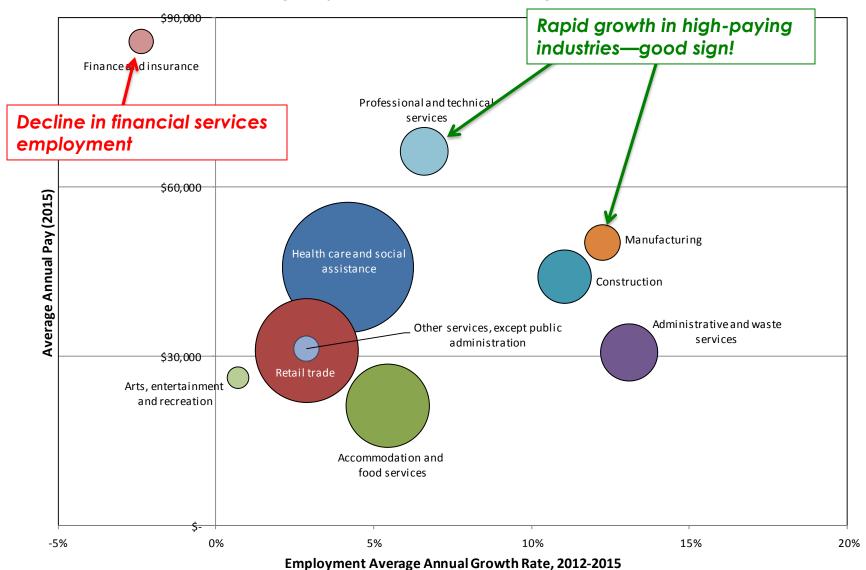
- 4-county overview and analysis
- Demographics (people)
 - Education, race/ethnicity, age, industry/occupation, unionization
- Industry analysis (companies)
 - Overall structure
 - Growth, average payroll, concentration
- Sub-sector industry analysis
 - Health Care
 - Manufacturing
 - Information, and 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

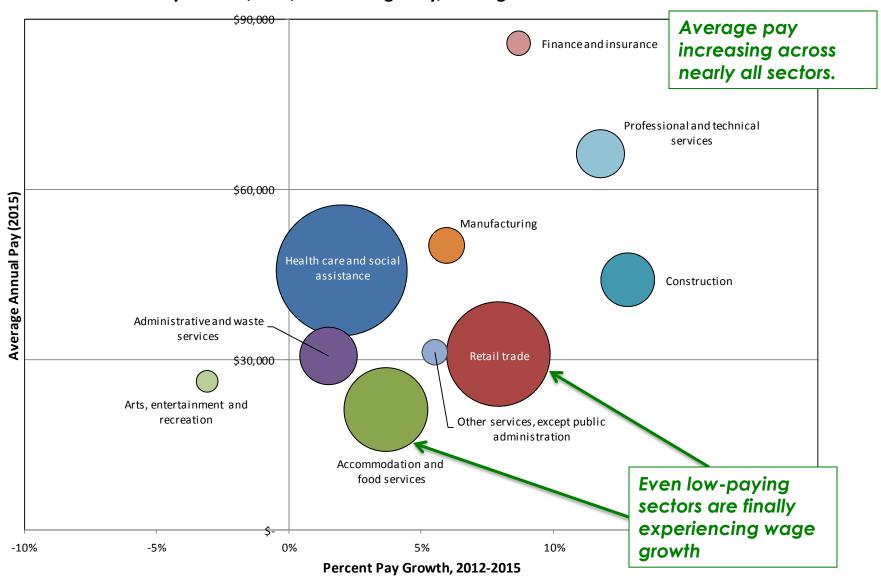
- Sarasota County faster growth overall—fastest in the region
- Most promising growth opportunities appear in:
 - Manufacturing (esp. fabricated metal products)
 - Professional and technical services (esp. computer systems design)
- Solid employment opportunities:
 - Health care remains an important, 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



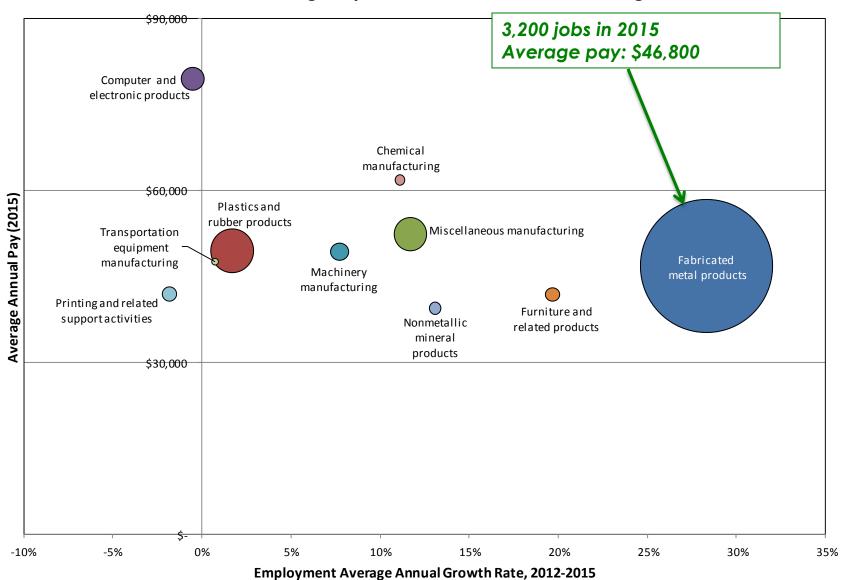
Pay Growth, Size, and Average Pay, 10 Largest Private Industries



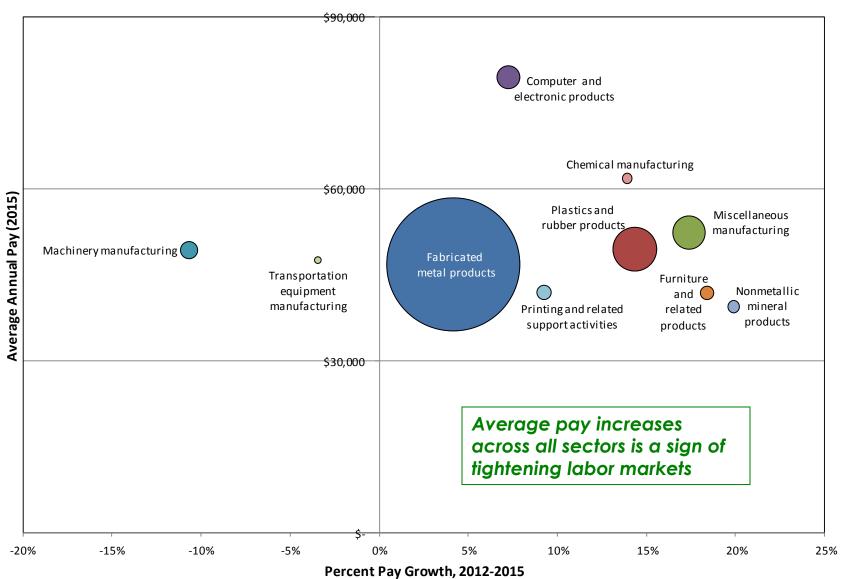
ANALYSIS OF SUB-SECTORS

Manufacturing

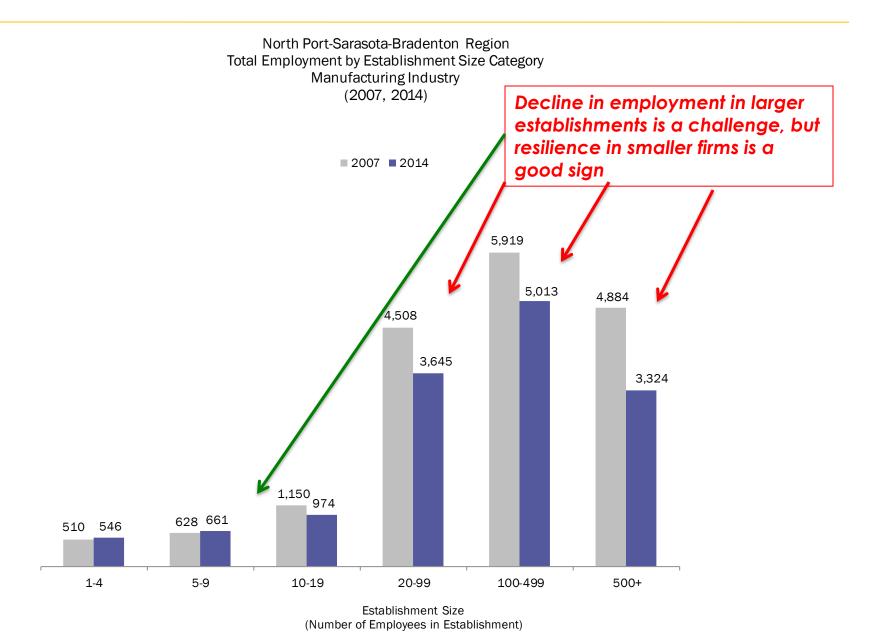
Annual Average Pay, Size, and Growth, Manufacturing



Pay Growth, Size, and Average Pay, Manufacturing



NORTH PORT-SARASOTA REGION: MANUFACTURING



NORTH PORT-SARASOTA REGION: MANUFACTURING CARFFR LADDER

Structural metal fabricators and fitters

Annual job openings: 9 in 2-county region

Wage per hour (entry -lev el, median): \$15.41, \$20.17

Required training/experience: Postsecondary

% of jobs in Manufacturing industry: 83%

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%

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

% of jobs in Manufacturing industry: 25%

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

% of jobs in Manufacturing industry: 98%

Inspectors, testers, sorters, samplers, and

Annual job openings: 16 in 2-county region

weighers

Wage per hour (entry-level, median): \$10.88, \$14.63

Required training/experience: High School Diploma

% of jobs in Manufacturing industry: 66%

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%

Note: Good employment and career opportunities without BA Degree. though entry-level can have low wages

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

% 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%

% of jobs in Manufacturing industry: 25%

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: 28%

Packers and packagers, hand

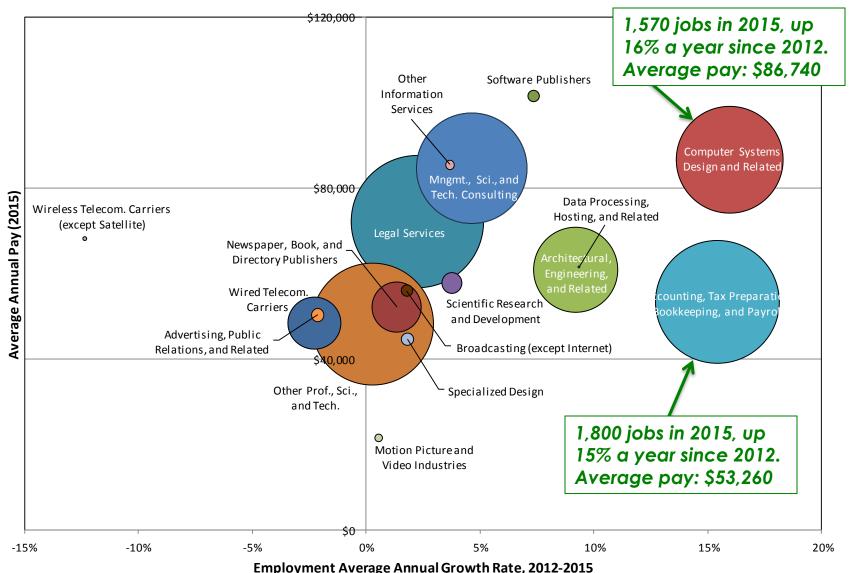
Annual job openings: 39 in 2-county region

Wage per hour (entry-level, median): \$8.92, \$9.26 Required training/experience: Less than High School

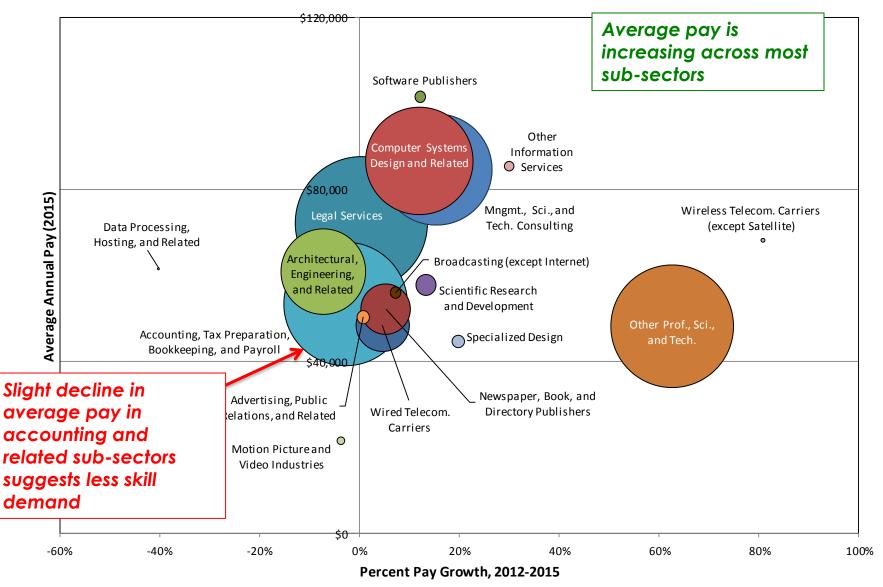
ANALYSIS OF SUB-SECTORS

Information and Professional & Technical Services

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

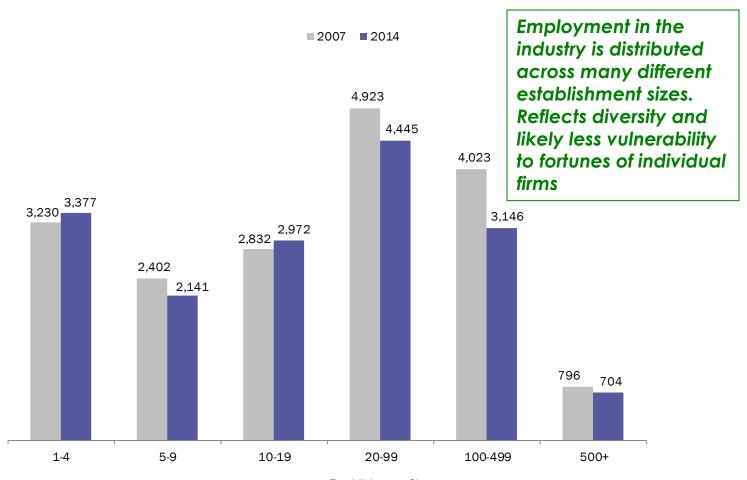


Pay Growth, Size, and Average Pay, Information and Prof. & Tech. Services



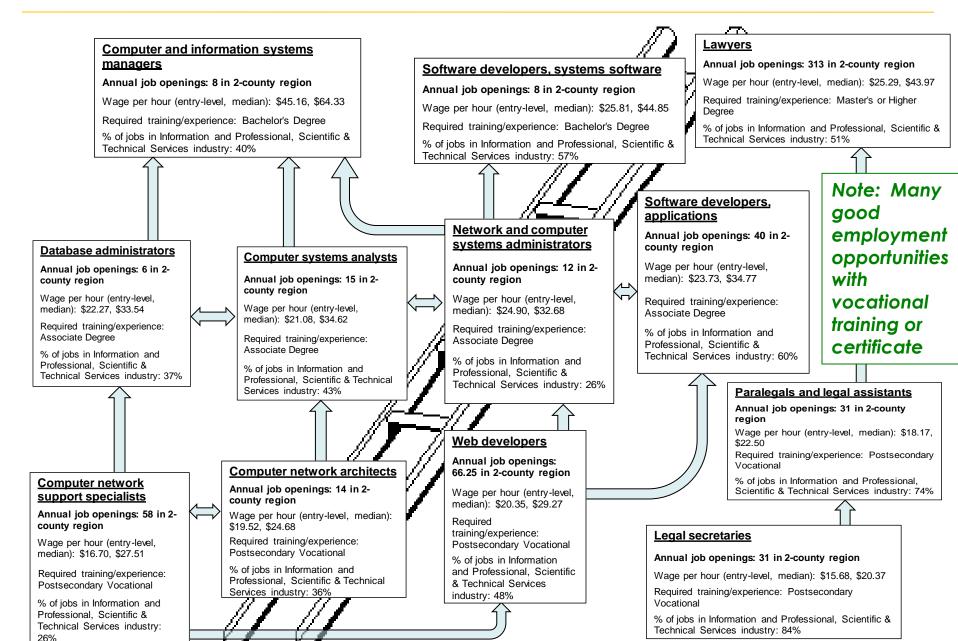
NORTH PORT-SARASOTA REGION: INFORMATION AND PROF. & TECH. SERVICES

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



Establishment Size (Number of Employees in Establishment)

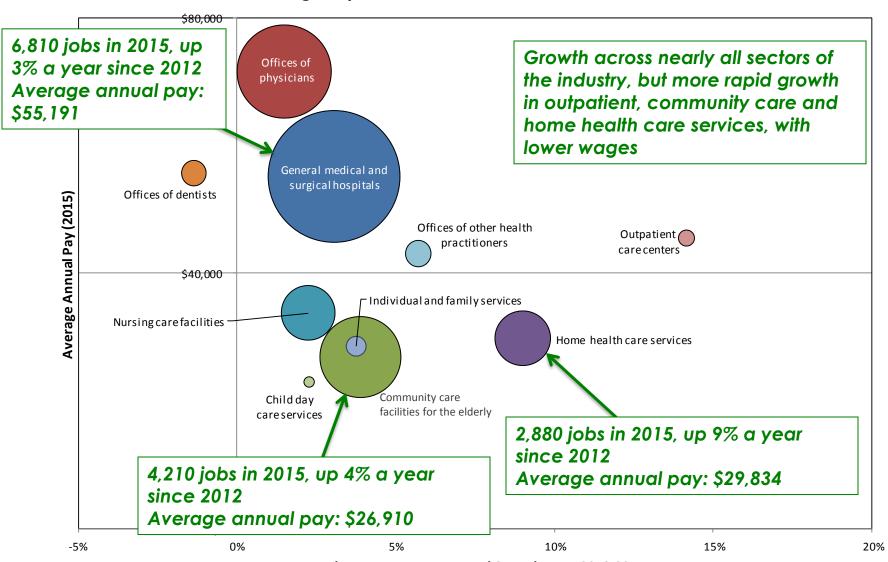
NORTH PORT-SARASOTA REGION: INFORMATION AND PROF. & TECH. SERVICES CAREER LADDER



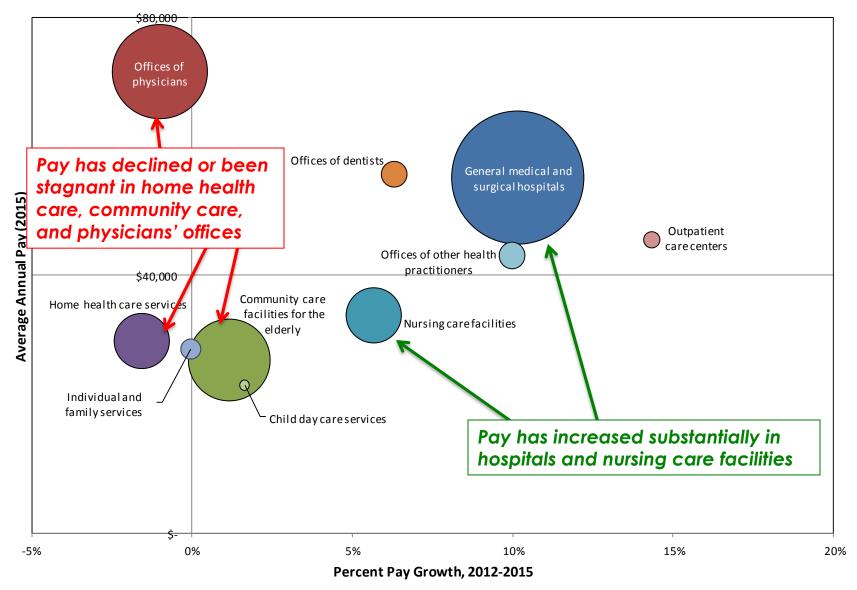
ANALYSIS OF SUB-SECTORS

Health Care

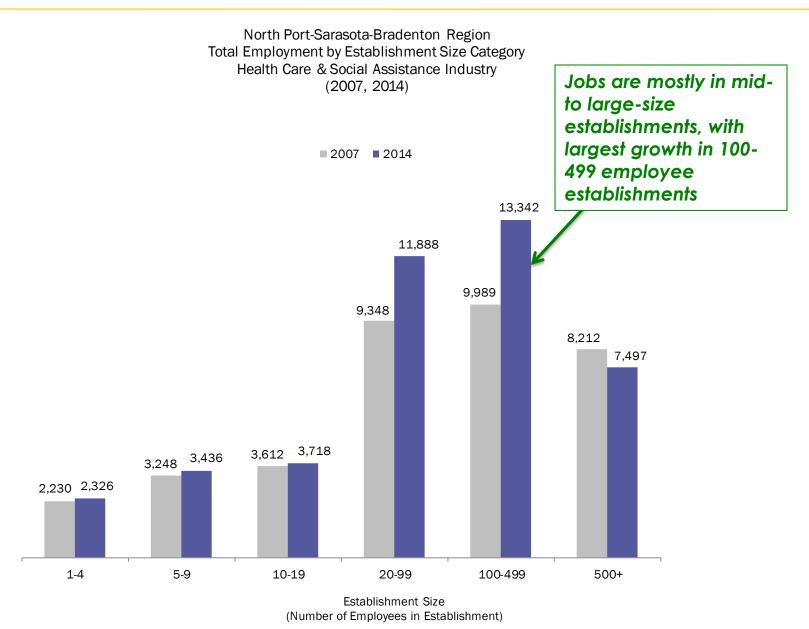
Annual Average Pay, Size, and Growth, Health and Social Assistance



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



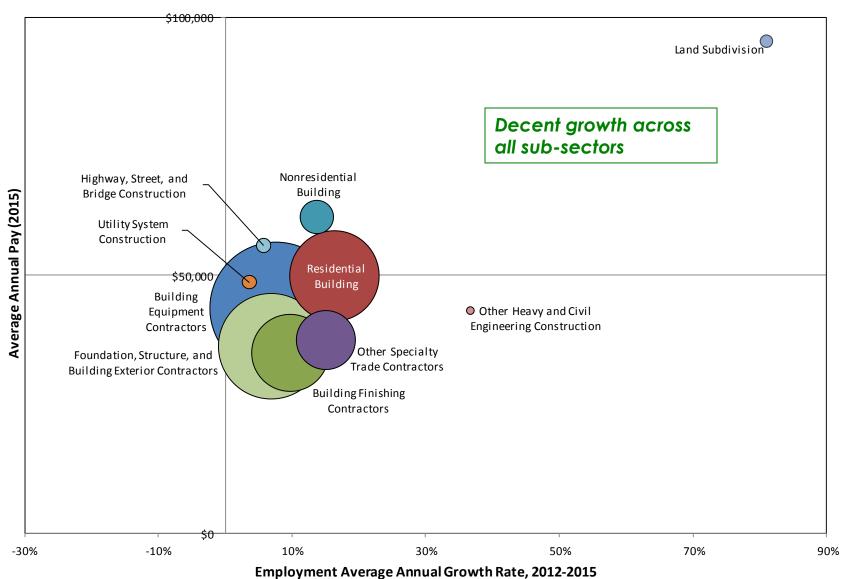
NORTH PORT-SARASOTA REGION: HEALTH CARE & SOCIAL ASSISTANCE



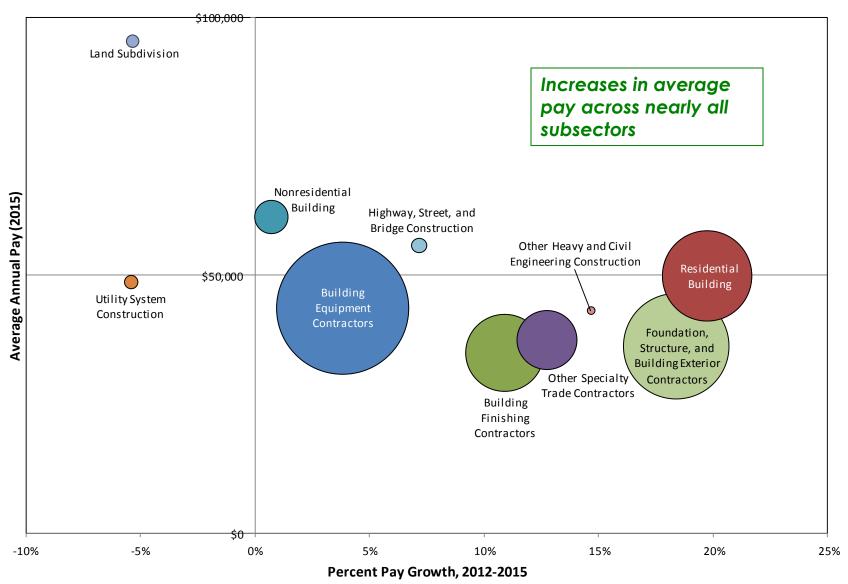
ANALYSIS OF SUB-SECTORS

Construction

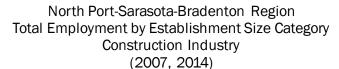
Annual Average Pay, Size, and Growth, Construction

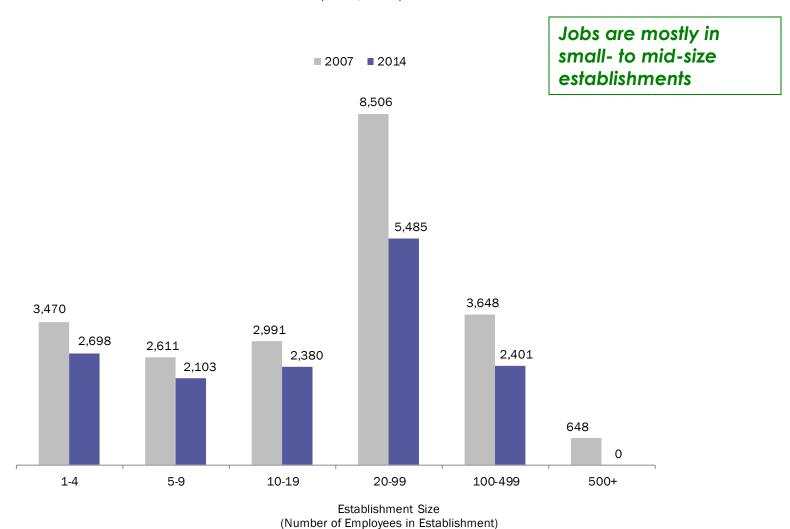


Pay Growth, Size, and Average Pay, Construction

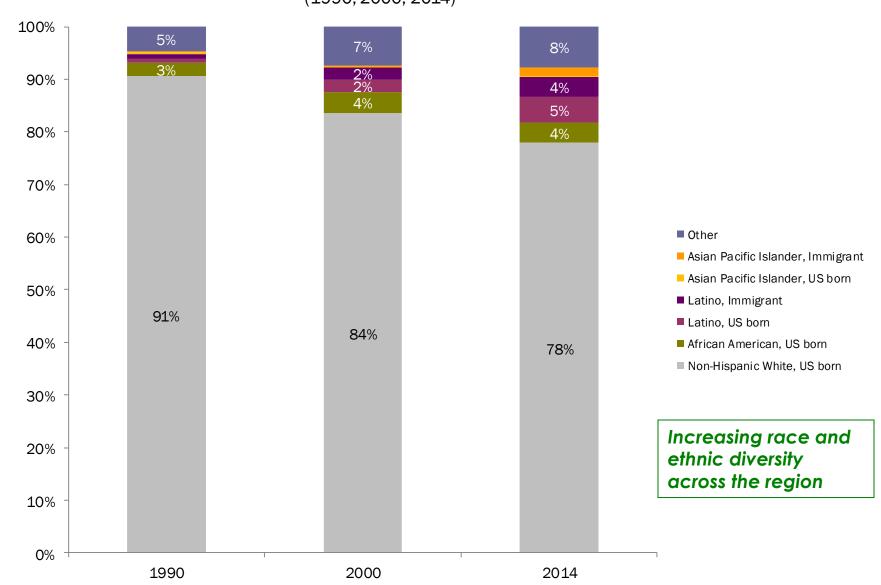


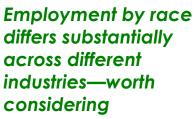
NORTH PORT-SARASOTA REGION: CONSTRUCTION



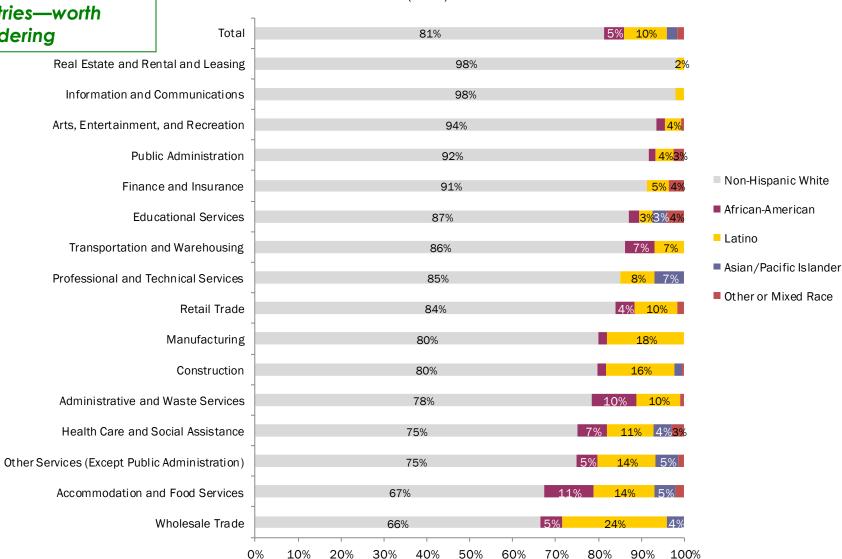








Sarasota County Industry Employment by Race (2014)



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 groundfloor
 - 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!

