LABOR MARKET TRENDS IN THE CAPITAL AREA

An Initial Research Brief for the Capital Area Economic Development District Board
• What does unemployment look like in the region? Specifically, are there enough jobs, and are people qualified to get them?
## Unemployment Trending Down in the Region

<table>
<thead>
<tr>
<th>Metropolitan area</th>
<th>August 2016 Unemployment Rate</th>
<th>Rank</th>
</tr>
</thead>
<tbody>
<tr>
<td>Denver-Aurora-Lakewood, CO</td>
<td>3.2</td>
<td>1</td>
</tr>
<tr>
<td>Salt Lake City, UT</td>
<td>3.2</td>
<td>1</td>
</tr>
<tr>
<td><strong>Austin-Round Rock, TX</strong></td>
<td><strong>3.5</strong></td>
<td><strong>3</strong></td>
</tr>
<tr>
<td>Boston-Cambridge-Nashua, MA-NH</td>
<td>3.5</td>
<td>3</td>
</tr>
<tr>
<td>Minneapolis-St. Paul-Bloomington, MN-WI</td>
<td>3.6</td>
<td>5</td>
</tr>
<tr>
<td>Columbus, OH</td>
<td>3.9</td>
<td>6</td>
</tr>
<tr>
<td>Nashville-Davidson--Murfreesboro--Franklin, TN</td>
<td>3.9</td>
<td>6</td>
</tr>
<tr>
<td>Washington-Arlington-Alexandria, DC-VA-MD-WV</td>
<td>4</td>
<td>8</td>
</tr>
<tr>
<td>Cincinnati, O-KY-IN</td>
<td>4.1</td>
<td>9</td>
</tr>
<tr>
<td><strong>Dallas-Fort Worth-Arlington, TX</strong></td>
<td><strong>4.1</strong></td>
<td><strong>9</strong></td>
</tr>
<tr>
<td>Louisville/Jefferson County, KY-IN</td>
<td>4.1</td>
<td>9</td>
</tr>
<tr>
<td><strong>San Antonio-New Braunfels, TX</strong></td>
<td><strong>4.1</strong></td>
<td><strong>9</strong></td>
</tr>
<tr>
<td>San Francisco-Oakland-Hayward, CA</td>
<td>4.1</td>
<td>9</td>
</tr>
<tr>
<td>San Jose-Sunnyvale-Santa Clara, CA</td>
<td>4.1</td>
<td>9</td>
</tr>
</tbody>
</table>

Source: Bureau of Labor Statistics
Unemployment Trending Down in the Region

Unemployment Over Time in the Capital Area

Source: Bureau of Labor Statistics
Pockets of Deep Unemployment Remain

Source: U.S. Census Bureau
Variation in Unemployment by Race/Ethnicity

Unemployment Rate by Race/Ethnicity (2015)

Source: U.S. Census Bureau
Variation in Unemployment by Education

Unemployment Rate by Education (2015)

Source: U.S. Census Bureau
Unemployment in the Austin MSA by Occupation Group

- Office and Administrative Support: 5,000
- Construction and Extraction: 4,000
- Sales and Related: 3,000
- No Previous Work Experience/Unspecified: 3,000
- Management: 3,000
- Food Preparation and Serving Related: 2,000
- Transportation and Material Moving: 2,000
- Business and Financial Operations: 2,000
- Installation, Maintenance, and Repair: 2,000
- Production: 2,000
- Education, Training, and Library: 1,000
- Architecture and Engineering: 1,000
- Building and Grounds Cleaning and Maintenance: 1,000
- Computer and Mathematical: 1,000
- Personal Care and Service: 1,000
- Arts, Design, Entertainment, Sports, and Media: 1,000
- Healthcare Support: 1,000
- Healthcare Practitioners and Technical: 1,000
- Legal: 1,000
- Protective Service: 1,000
- Community and Social Service: 1,000
- Life, Physical, and Social Science: 1,000
- Farming, Fishing, and Forestry: 1,000

Source: EMSI
Unemployment isn’t really correlated with wage

Source: EMSI
Proposed Answer to Question #1

• What does unemployment look like in the region? Specifically, are there enough jobs, and are people qualified to get them?
  
  • Generally, unemployment is very low in the region
  
  • There are pockets of deep unemployment that are broadly geographically distributed
  
  • Unemployment is a bigger issue for workers with low educational attainment
Question #2 – Job Creation and Distribution

• Are we creating the “right” jobs in terms of:
  
  • Economic resiliency?
  
  • Economic competitiveness?
  
  • Equity and affordability?
Employment is distributed across a healthy number of clusters, and Austin’s clusters are growing...

Industry Clusters for Austin-RR MSA as of 2016Q2

Source: JobsEQ®, Data as of 2016Q2
particularly compared to the national picture

Industry Clusters for USA as of 2016Q2

Average Annual Employment Forecast Rate(%) 2016Q2-2026Q2

Source: JobsEQ®, Data as of 2016Q2
How are Austin’s jobs distributed, relative to peers?

Employment by Occupation Group

Architecture and Engineering
Arts, Design, Entertainment, Sports, and Media
Building and Grounds Cleaning and Maintenance
Business and Financial Operations
Community and Social Service
Computer and Mathematical
Construction and Extraction
Education, Training, and Library
Farming, Fishing, and Forestry
Food Preparation and Serving Related
Healthcare Practitioners and Technical
Healthcare Support
Installation, Maintenance, and Repair
Legal
Life, Physical, and Social Science
Management
Military
Office and Administrative Support
Personal Care and Service
Production
Protective Service
Sales and Related
Transportation and Material Moving

Source: EMSI

Click Here! This Graphic is Interactive.
Employment in Advanced Industries is Booming

Advanced Industries Employment in the Capital Area

Source: EMSI
## Employment Change by Occupation Group

<table>
<thead>
<tr>
<th>SOC</th>
<th>Description</th>
<th>2010 Jobs</th>
<th>2016 Jobs</th>
<th>2010 - 2016 Change</th>
<th>2010 - 2016 % Change</th>
<th>Avg. Hourly Earnings</th>
</tr>
</thead>
<tbody>
<tr>
<td>11-0000</td>
<td>Management</td>
<td>40,963</td>
<td>51,187</td>
<td>10,224</td>
<td>25%</td>
<td>$52.05</td>
</tr>
<tr>
<td>13-0000</td>
<td>Business and Financial Operations</td>
<td>51,319</td>
<td>64,374</td>
<td>13,055</td>
<td>25%</td>
<td>$35.39</td>
</tr>
<tr>
<td>15-0000</td>
<td>Computer and Mathematical</td>
<td>40,961</td>
<td>62,290</td>
<td>21,329</td>
<td>52%</td>
<td>$40.35</td>
</tr>
<tr>
<td>17-0000</td>
<td>Architecture and Engineering</td>
<td>21,863</td>
<td>25,437</td>
<td>3,574</td>
<td>16%</td>
<td>$40.63</td>
</tr>
<tr>
<td>19-0000</td>
<td>Life, Physical, and Social Science</td>
<td>8,907</td>
<td>9,797</td>
<td>890</td>
<td>10%</td>
<td>$29.15</td>
</tr>
<tr>
<td>21-0000</td>
<td>Community and Social Service</td>
<td>12,161</td>
<td>13,206</td>
<td>1,045</td>
<td>9%</td>
<td>$22.98</td>
</tr>
<tr>
<td>23-0000</td>
<td>Legal</td>
<td>10,557</td>
<td>12,149</td>
<td>1,592</td>
<td>15%</td>
<td>$47.28</td>
</tr>
<tr>
<td>25-0000</td>
<td>Education, Training, and Library</td>
<td>59,203</td>
<td>61,228</td>
<td>2,025</td>
<td>3%</td>
<td>$22.65</td>
</tr>
<tr>
<td>27-0000</td>
<td>Arts, Design, Entertainment, Sports, and Media</td>
<td>19,040</td>
<td>24,110</td>
<td>5,070</td>
<td>27%</td>
<td>$24.74</td>
</tr>
<tr>
<td>29-0000</td>
<td>Healthcare Practitioners and Technical</td>
<td>36,398</td>
<td>45,873</td>
<td>9,475</td>
<td>26%</td>
<td>$37.50</td>
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<tr>
<td>31-0000</td>
<td>Healthcare Support</td>
<td>15,982</td>
<td>20,202</td>
<td>4,220</td>
<td>26%</td>
<td>$14.93</td>
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<tr>
<td>33-0000</td>
<td>Protective Service</td>
<td>18,607</td>
<td>20,506</td>
<td>1,899</td>
<td>10%</td>
<td>$22.40</td>
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<tr>
<td>35-0000</td>
<td>Food Preparation and Serving Related</td>
<td>73,853</td>
<td>102,676</td>
<td>28,823</td>
<td>39%</td>
<td>$11.45</td>
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<tr>
<td>37-0000</td>
<td>Building and Grounds Cleaning and Maintenance</td>
<td>29,529</td>
<td>38,356</td>
<td>8,827</td>
<td>30%</td>
<td>$12.26</td>
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<tr>
<td>39-0000</td>
<td>Personal Care and Service</td>
<td>30,516</td>
<td>40,624</td>
<td>10,108</td>
<td>33%</td>
<td>$12.52</td>
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<tr>
<td>41-0000</td>
<td>Sales and Related</td>
<td>90,596</td>
<td>113,250</td>
<td>22,654</td>
<td>25%</td>
<td>$20.89</td>
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<tr>
<td>43-0000</td>
<td>Office and Administrative Support</td>
<td>146,331</td>
<td>178,276</td>
<td>31,945</td>
<td>22%</td>
<td>$18.16</td>
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<tr>
<td>45-0000</td>
<td>Farming, Fishing, and Forestry</td>
<td>1,363</td>
<td>1,714</td>
<td>351</td>
<td>26%</td>
<td>$12.78</td>
</tr>
<tr>
<td>47-0000</td>
<td>Construction and Extraction</td>
<td>39,235</td>
<td>51,835</td>
<td>12,600</td>
<td>32%</td>
<td>$18.31</td>
</tr>
<tr>
<td>49-0000</td>
<td>Installation, Maintenance, and Repair</td>
<td>28,496</td>
<td>35,371</td>
<td>6,875</td>
<td>24%</td>
<td>$19.63</td>
</tr>
<tr>
<td>51-0000</td>
<td>Production</td>
<td>29,563</td>
<td>34,187</td>
<td>4,624</td>
<td>16%</td>
<td>$16.50</td>
</tr>
<tr>
<td>53-0000</td>
<td>Transportation and Material Moving</td>
<td>33,519</td>
<td>43,852</td>
<td>10,333</td>
<td>31%</td>
<td>$15.48</td>
</tr>
<tr>
<td>55-0000</td>
<td>Military</td>
<td>4,205</td>
<td>4,608</td>
<td>403</td>
<td>10%</td>
<td>$16.92</td>
</tr>
</tbody>
</table>

Source: EMSI
<table>
<thead>
<tr>
<th>SOC</th>
<th>Description</th>
<th>2010 Jobs</th>
<th>2016 Jobs</th>
<th>2010 - 2016 Change</th>
<th>2010 - 2016 % Change</th>
<th>Avg. Hourly Earnings</th>
</tr>
</thead>
<tbody>
<tr>
<td>11-1021</td>
<td>General and Operations Managers</td>
<td>11,771</td>
<td>15,392</td>
<td>3,621</td>
<td>31%</td>
<td>$57.67</td>
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<tr>
<td>13-1071</td>
<td>Human Resources Specialists</td>
<td>3,789</td>
<td>4,883</td>
<td>1,094</td>
<td>29%</td>
<td>$32.83</td>
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<tr>
<td>13-1111</td>
<td>Management Analysts</td>
<td>5,008</td>
<td>6,209</td>
<td>1,201</td>
<td>24%</td>
<td>$43.68</td>
</tr>
<tr>
<td>13-1161</td>
<td>Market Research Analysts and Marketing Specialists</td>
<td>3,883</td>
<td>5,711</td>
<td>1,828</td>
<td>47%</td>
<td>$38.36</td>
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<tr>
<td>13-2011</td>
<td>Accountants and Auditors</td>
<td>9,498</td>
<td>12,462</td>
<td>2,964</td>
<td>31%</td>
<td>$34.33</td>
</tr>
<tr>
<td>SOC</td>
<td>Description</td>
<td>2010 Jobs</td>
<td>2016 Jobs</td>
<td>2010 - 2016 Change</td>
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<td>Avg. Hourly Earnings</td>
</tr>
<tr>
<td>----------</td>
<td>--------------------------------------------</td>
<td>-----------</td>
<td>-----------</td>
<td>--------------------</td>
<td>----------------------</td>
<td>---------------------</td>
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<tr>
<td>15-1121</td>
<td>Computer Systems Analysts</td>
<td>7,027</td>
<td>11,514</td>
<td>4,487</td>
<td>64%</td>
<td>$40.33</td>
</tr>
<tr>
<td>15-1131</td>
<td>Computer Programmers</td>
<td>2,821</td>
<td>3,996</td>
<td>1,175</td>
<td>42%</td>
<td>$42.75</td>
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<tr>
<td>15-1132</td>
<td>Software Developers, Applications</td>
<td>7,450</td>
<td>12,210</td>
<td>4,760</td>
<td>64%</td>
<td>$45.96</td>
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<tr>
<td>15-1133</td>
<td>Software Developers, Systems Software</td>
<td>4,801</td>
<td>7,276</td>
<td>2,475</td>
<td>52%</td>
<td>$48.18</td>
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<tr>
<td>15-1134</td>
<td>Web Developers</td>
<td>1,363</td>
<td>2,427</td>
<td>1,064</td>
<td>78%</td>
<td>$33.71</td>
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<tr>
<td>15-1142</td>
<td>Network and Computer Systems Administrators</td>
<td>3,264</td>
<td>4,623</td>
<td>1,359</td>
<td>42%</td>
<td>$41.48</td>
</tr>
<tr>
<td>15-1151</td>
<td>Computer User Support Specialists</td>
<td>6,124</td>
<td>8,774</td>
<td>2,650</td>
<td>43%</td>
<td>$24.65</td>
</tr>
</tbody>
</table>

Source: EMSI
Low-Wage Job Growth is Most Robust

Job Creation by Average Annual Wage (2015-2016)

- < $25,000: 8,376 jobs
- $25,000 - $40,000: 13,467 jobs
- $40,000 - $55,000: 4,945 jobs
- $55,000 - $70,000: 4,469 jobs
- $70,000 - $85,000: 2,974 jobs
- $85,000 - $100,000: 1,628 jobs
- > $100,000: 2,526 jobs

Source: EMSI
Austin has more low-wage job growth than most peer cities

Share of New Jobs by Average Annual Wages (2015-2016)

<table>
<thead>
<tr>
<th>City</th>
<th>&lt; $25,000</th>
<th>$25,000 - $40,000</th>
</tr>
</thead>
<tbody>
<tr>
<td>San Antonio</td>
<td>29%</td>
<td>34%</td>
</tr>
<tr>
<td>Raleigh</td>
<td>23%</td>
<td>38%</td>
</tr>
<tr>
<td>Phoenix</td>
<td>15%</td>
<td>45%</td>
</tr>
<tr>
<td>Las Vegas</td>
<td>9%</td>
<td>49%</td>
</tr>
<tr>
<td>Austin</td>
<td>22%</td>
<td>35%</td>
</tr>
<tr>
<td>Denver</td>
<td>21%</td>
<td>34%</td>
</tr>
<tr>
<td>Columbus</td>
<td>18%</td>
<td>35%</td>
</tr>
<tr>
<td>Nashville</td>
<td>5%</td>
<td>47%</td>
</tr>
<tr>
<td>Minneapolis</td>
<td>17%</td>
<td>33%</td>
</tr>
<tr>
<td>Portland</td>
<td>10%</td>
<td>38%</td>
</tr>
<tr>
<td>Kansas City</td>
<td>18%</td>
<td>30%</td>
</tr>
<tr>
<td>Seattle</td>
<td>5%</td>
<td>36%</td>
</tr>
<tr>
<td>Boston</td>
<td>4%</td>
<td>31%</td>
</tr>
<tr>
<td>Milwaukee</td>
<td>10%</td>
<td>23%</td>
</tr>
<tr>
<td>San Francisco</td>
<td>8%</td>
<td>23%</td>
</tr>
<tr>
<td>San Jose</td>
<td>7%</td>
<td>20%</td>
</tr>
</tbody>
</table>

Source: EMSI
## Fast Growing Occupations: Food Service

<table>
<thead>
<tr>
<th>SOC</th>
<th>Description</th>
<th>2010 Jobs</th>
<th>2016 Jobs</th>
<th>2010 - 2016 Change</th>
<th>2010 - 2016 % Change</th>
<th>Avg. Hourly Earnings</th>
</tr>
</thead>
<tbody>
<tr>
<td>35-1012</td>
<td>First-Line Supervisors of Food Preparation and Serving Workers</td>
<td>4,886</td>
<td>6,887</td>
<td>2,001</td>
<td>41%</td>
<td>$18.01</td>
</tr>
<tr>
<td>35-2014</td>
<td>Cooks, Restaurant</td>
<td>6,878</td>
<td>9,763</td>
<td>2,885</td>
<td>42%</td>
<td>$11.34</td>
</tr>
<tr>
<td>35-2021</td>
<td>Food Preparation Workers</td>
<td>4,087</td>
<td>5,420</td>
<td>1,333</td>
<td>33%</td>
<td>$11.67</td>
</tr>
<tr>
<td>35-3011</td>
<td>Bartenders</td>
<td>3,804</td>
<td>5,434</td>
<td>1,630</td>
<td>43%</td>
<td>$13.37</td>
</tr>
<tr>
<td>35-3021</td>
<td>Combined Food Preparation and Serving Workers, Including Fast Food</td>
<td>18,408</td>
<td>27,211</td>
<td>8,803</td>
<td>48%</td>
<td>$10.22</td>
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<tr>
<td>35-3031</td>
<td>Waiters and Waitresses</td>
<td>16,277</td>
<td>21,976</td>
<td>5,699</td>
<td>35%</td>
<td>$11.30</td>
</tr>
</tbody>
</table>

*Source: EMSI*
## Fast Growing Occupations: Office Support

<table>
<thead>
<tr>
<th>SOC</th>
<th>Description</th>
<th>2010 Jobs</th>
<th>2016 Jobs</th>
<th>2010 - 2016 Change</th>
<th>2010 - 2016 % Change</th>
<th>Avg. Hourly Earnings</th>
</tr>
</thead>
<tbody>
<tr>
<td>43-1011</td>
<td>First-Line Supervisors of Office and Administrative Support Workers</td>
<td>9,266</td>
<td>11,483</td>
<td>2,217</td>
<td>24%</td>
<td>$30.92</td>
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<tr>
<td>43-3031</td>
<td>Bookkeeping, Accounting, and Auditing Clerks</td>
<td>9,049</td>
<td>10,557</td>
<td>1,508</td>
<td>17%</td>
<td>$19.98</td>
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<tr>
<td>43-4051</td>
<td>Customer Service Representatives</td>
<td>18,506</td>
<td>23,937</td>
<td>5,431</td>
<td>29%</td>
<td>$15.34</td>
</tr>
<tr>
<td>43-5081</td>
<td>Stock Clerks and Order Fillers</td>
<td>9,134</td>
<td>11,050</td>
<td>1,916</td>
<td>21%</td>
<td>$12.63</td>
</tr>
<tr>
<td>43-6011</td>
<td>Executive Secretaries and Executive Administrative Assistants</td>
<td>7,962</td>
<td>9,231</td>
<td>1,269</td>
<td>16%</td>
<td>$27.44</td>
</tr>
<tr>
<td>43-6013</td>
<td>Medical Secretaries</td>
<td>4,662</td>
<td>6,471</td>
<td>1,809</td>
<td>39%</td>
<td>$17.20</td>
</tr>
<tr>
<td>43-6014</td>
<td>Secretaries and Administrative Assistants, Except Legal, Medical, and Executive</td>
<td>19,028</td>
<td>23,056</td>
<td>4,028</td>
<td>21%</td>
<td>$16.22</td>
</tr>
<tr>
<td>43-9061</td>
<td>Office Clerks, General</td>
<td>24,419</td>
<td>30,382</td>
<td>5,963</td>
<td>24%</td>
<td>$16.62</td>
</tr>
</tbody>
</table>

*Source: EMSI*
# Fast Growing Occupations: Construction and Trades

<table>
<thead>
<tr>
<th>SOC</th>
<th>Description</th>
<th>2010 Jobs</th>
<th>2016 Jobs</th>
<th>2010 - 2016 Change</th>
<th>2010 - 2016 % Change</th>
<th>Avg. Hourly Earnings</th>
</tr>
</thead>
<tbody>
<tr>
<td>47-1011</td>
<td>First-Line Supervisors of Construction Trades and Extraction Workers</td>
<td>4,073</td>
<td>5,476</td>
<td>1,403</td>
<td>34%</td>
<td>$28.96</td>
</tr>
<tr>
<td>47-2031</td>
<td>Carpenters</td>
<td>4,834</td>
<td>6,141</td>
<td>1,307</td>
<td>27%</td>
<td>$17.02</td>
</tr>
<tr>
<td>47-2061</td>
<td>Construction Laborers</td>
<td>7,647</td>
<td>11,741</td>
<td>4,094</td>
<td>54%</td>
<td>$13.74</td>
</tr>
<tr>
<td>49-3023</td>
<td>Automotive Service Technicians and Mechanics</td>
<td>3,563</td>
<td>4,563</td>
<td>1,000</td>
<td>28%</td>
<td>$17.97</td>
</tr>
<tr>
<td>49-9071</td>
<td>Maintenance and Repair Workers, General</td>
<td>7,006</td>
<td>8,550</td>
<td>1,544</td>
<td>22%</td>
<td>$17.28</td>
</tr>
</tbody>
</table>

Source: EMSI
Wages in Austin are largely in line with statewide levels

Cost of Living Adjustment?  
No

Compare Austin to Whom?  
Texas

Wages by Occupation Group

Architecture and Engineering
Arts, Design, Entertainment, Sports, and Media
Building and Grounds Cleaning and Maintenance
Business and Financial Operations
Community and Social Service
Computer and Mathematical
Construction and Extraction
Education, Training, and Library
Farming, Fishing, and Forestry
Food Preparation and Serving Related
Healthcare Practitioners and Technical
Healthcare Support
Installation, Maintenance, and Repair
Legal
Life, Physical, and Social Science
Management
Military
Office and Administrative Support
Personal Care and Service
Production
Protective Service
Sales and Related
Transportation and Material Moving

Average Hourly Wage

Source: EMSI
• Are we creating the “right” jobs in terms of:
  • Economic resiliency?
  • Economic competitiveness?
  • Equity and affordability?

• We seem to have a broadly diversified base of employment, with strong growth numbers shown across multiple sectors

• We are showing growth in “Advanced Industries” employment and in high-skill occupations that is consistent with a strong outlook for economic competitiveness

• That said, in terms of volume, job creation is weighted toward the low-end of the wage spectrum. This seems like a function of robust growth in retail, office support, and food service sectors. It may not be feasible to expect wage growth in these sectors that will keep pace with rising cost-of-living in the region.
• So, new jobs are being created. That seems good. And unemployment is low. That also seems good. But is everyone happy where they are?

• In other words, can employers find the qualified candidates they’re looking for? Can workers find the training and vacancies needed to change jobs?
There does seem to be a need for more workers, particularly in fields that pay between $40k and $100k.

Source: EMSI

Click Here! This Graphic is Interactive.
The largest projected gaps are for occupations that require a Bachelor’s Degree.
Here’s the picture for the healthcare sector

Projected Annual Occupation Supply Gaps by Education Required (Austin MSA)

- No formal educational credential
- High school diploma or equivalent
- Postsecondary nondegree award
- Associate’s degree
- Bachelor’s degree
- Master’s degree
- Doctoral or professional degree

Annual Supply Gap (Negative Number Implies Oversupply)

Medical assistants

Registered nurses

Source: EMSI
And for “Computer and Mathematical” Occupations

Projected Annual Occupation Supply Gaps by Education Required (Austin MSA)

- Some college, no degree
- Associate’s degree
- Bachelor’s degree
- Master’s degree
- Doctoral or professional degree

Annual Supply Gap (Negative Number Implies Oversupply)

Source: EMSI

Click Here! This Graphic is Interactive
And for “Construction and Trades” Occupations

Projected Annual Occupation Supply Gaps by Education Required (Austin MSA)

- No formal educational credential
- High school diploma or equivalent
- Some college, no degree
- Postsecondary nondegree award
- Associate’s degree

Electricians
Carpenters

Annual Supply Gap (Negative Number Implies Oversupply)

Source: EMSI
Hiring Difficulty

Source: Greater Austin Chamber

AUSTIN CHAMBER OF COMMERCE
Hiring Difficulty for Employers for Top 20 Job Postings & Typical Education Needed for Entry
Austin-Round Rock-San Marcos MSA from Sep 14, 2016 to Oct 13, 2016

- Austin MSA Hiring Difficulty (score ranges from 1 to 99, with 99 indicating hardest-to-fill)

- Registered Nurses
  - Bachelor's degree: 75
- Software Developers, Applications
  - Bachelor's degree: 84
- Web Developers
  - Associate's degree: 94
- First-Line Supervisors of Retail Sales Workers
  - High school diploma or equivalent + Less than 5 yrs related work experience: 69
- Customer Service Representatives
  - High school diploma or equivalent + Short-term on-the-job training: 27
- Network and Computer Systems Administrators
  - Bachelor's degree: 85
- Retail Salespersons
  - No formal educational credential + Short-term on-the-job training: 20
- Computer Systems Analysts
  - Bachelor's degree: 58
- Management Analysts
  - Bachelor's degree + Less than 5 yrs related work experience: 83
- Computer User Support Specialists
  - Some college, no degree: 70
- First-Line Supervisors of Food Preparation and Serving Workers
  - High school diploma or equivalent + Less than 5 yrs related work experience: 61
- Marketing Managers
  - Bachelor's degree + 5 yrs related work experience: 94
- Heavy and Tractor-Trailer Truck Drivers
  - Postsecondary nondegree award + Short-term on-the-job training: 81
- First-Line Supervisors of Office and Administrative Support Workers
  - High school diploma or equivalent + Less than 5 yrs related work experience: 30
- Maintenance and Repair Workers, General
  - High school diploma or equivalent + Long-term on-the-job training: 46
- Information Technology Project Managers
  - Bachelor's degree: 93
- Maids and Housekeeping Cleaners
  - No formal educational credential + Short-term on-the-job training: 6
- Medical and Health Services Managers
  - Bachelor's degree + Less than 5 yrs related work experience: 91
- Sales Managers
  - Bachelor's degree + Less than 5 yrs related work experience: 91
- Computer Systems Engineers/Architects
  - Bachelor's degree: 93
In-Migration by Education

Share of 2014 In-Migration with a Bachelor’s Degree or Above

Source: U.S. Census Bureau
In-Migration by Origin

Share of 2014 In-Migration from Another State

<table>
<thead>
<tr>
<th>County</th>
<th>Share 2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bastrop County, Texas</td>
<td>13.9%</td>
</tr>
<tr>
<td>Blanco County, Texas</td>
<td>25.6%</td>
</tr>
<tr>
<td>Burnet County, Texas</td>
<td>14.0%</td>
</tr>
<tr>
<td>Caldwell County, Texas</td>
<td>13.6%</td>
</tr>
<tr>
<td>Fayette County, Texas</td>
<td>18.8%</td>
</tr>
<tr>
<td>Hays County, Texas</td>
<td>17.4%</td>
</tr>
<tr>
<td>Lee County, Texas</td>
<td>13.2%</td>
</tr>
<tr>
<td>Llano County, Texas</td>
<td>15.5%</td>
</tr>
<tr>
<td>Travis County, Texas</td>
<td>40.0%</td>
</tr>
<tr>
<td>Williamson County, Texas</td>
<td>31.8%</td>
</tr>
</tbody>
</table>

Source: U.S. Census Bureau
So, new jobs are being created. That seems good. And unemployment is low. That also seems good. But is everyone happy where they are?

In other words, can employers find the qualified candidates they’re looking for? Can workers find the training and vacancies needed to change jobs?

- Employers seem to be having a harder time finding enough high-skilled workers, particularly in computers fields.

- Some of the in-migration appears to be a function of demand for workers with a bachelor’s degree.

- For workers, the decision to up-skill and may or may not pay off, depending on credential achieved and occupation chosen.
Where do we go from here?

• Now that we’ve got a solid foundation in the data, how do we move to policy and programmatic recommendations and advocacy?

• How do we narrow the focus?
  
  • Focus on unemployment and uncovering issues where deep pockets of unemployment remain?
  
  • Focus on supply of workers?
    • High skill – can we produce more, so that existing occupation gaps are filled?
    • Medium skill – should we drill down into specific needs here?
  
  • Look for case studies from peer regions that inform our current situation?
  
  • Focus on labor/skills competitiveness in Target Industries for recruitment/expansion across the region?
Thank you

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