



Southwest Florida Workforce Overview Study 2016



December 2016

Prepared by the Research Team:





Report Information

This report is conducted annually by *Workforce Now*, a regional research initiative conducted by Southwest Florida's leading research institutions. The lead researchers of *Workforce Now* are grateful to the many individuals whose help and input make their work possible.

Preliminary drafts of this document were created by the Regional Economic Research Institute at Florida Gulf Coast University, which studies, analyzes, and reports on the regional economy encompassing Collier, Lee, Charlotte, Hendry, and Glades counties. Established in 2005, it serves as a public service and economic development unit of the Lutgert College of Business and strives to connect Southwest Florida to the resources of Florida Gulf Coast University.

Later drafts of this document were vetted and put into final format by researchers at Hodges University and Florida Southwestern State College, both of which maintain campuses in the five-county region, serving over 23,000 students and are active in workforce initiatives in Southwest Florida.

For more information, please contact:

Regional Economic Research Institute
Lutgert College of Business
Florida Gulf Coast University
10501 FGCU Blvd, S.
Fort Myers, FL 33965-6565
(239) 590-1000
<http://www.fgcu.edu/cob/reri/>

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PREFACE

Workforce Now is a regional research initiative to identify current and future talent requirements for the five counties of Southwest Florida. The initiative was created in October 2012 as an outcome of discussions following the Education Summits produced by The News-Press Media Group. It is envisioned as a systematic, strategic multi-year focus on understanding and meeting critical workforce needs.

The initiative is designed to provide better information on workforce gaps including skills, knowledge, and characteristics desired by regional employers. The plan is to provide a continuous stream of labor force information to employers and educational institutions and to look for ways to create dialogue and new partnerships between businesses and educational institutions. The quality of the regional workforce is a primary competitive factor in the region's ability to grow and prosper in a global marketplace.

This report is an annual overview of the Southwest Florida labor market that identifies the mix of industries, the industry growth trends, current employment gaps, and the average annual projected demand for regional occupations through 2023. It also defines the size of the regional employment gaps and identifies areas for further research. This information will help students, parents, businesses, and educators make more informed decisions about careers, employees, and programs.

This project and report would not be possible without the assistance of the Florida Department of Economic Opportunity and the generous support of the founding Workforce Now investors:

- The News-Press Media Group
- Partnership for Collier's Future Economy – Opportunity Naples
- The Lee County Industrial Development Authority
- The Southwest Florida Workforce Development Board
- Arthrex, Inc.
- Busey Bank
- Chico's FAS, Inc.
- Florida Gulf Coast University
- Florida SouthWestern State College
- Hodges University
- Manhattan Construction

The authors would like to thank Sarah Owen, President and CEO of the Southwest Florida Community Foundation, for leading this effort, and to Workforce Now's numerous sponsors. We would also like to acknowledge Mei-Mei Chan, the former President and Publisher of the News-Press Media Group, whose past leadership and influence helped shape Workforce Now into such an important ongoing research effort, and Dr. Gary Jackson, whose contributions to previous Workforce Overview studies continue to influence this project. Florida Gulf Coast University, Florida SouthWestern State College, and Hodges University provided the research leadership and staff to complete this fourth Workforce Now annual overview report.

The views expressed in the report and any errors contained are those of the authors and not of the institutions or companies that supported or participated in the Workforce Now project. The Workforce Now Reports are available at www.fgcu.edu/cob/reri/wfn/.

Christopher Westley

Dr. Christopher Westley
Director

Regional Economic Research Institute
Lutgert College of Business
Florida Gulf Coast University

John Meyer

Dr. John Meyer
Dean

School of Business & Technology
Florida SouthWestern State College

Aysegul Timur

Dr. Aysegul Timur
Dean

Johnson School of Business
Hodges University

RESEARCH TEAM

Florida Gulf Coast University

Dr. Christopher Westley is the Director of the Regional Economic Research Institute at Florida Gulf Coast University and a Professor of Economics.

Florida SouthWestern State College

Dr. John Meyer is the Dean of the School of Business and Technology at Florida SouthWestern State College.

Hodges University

Dr. Aysegul Timur is the Dean of the Johnson School of Business and a Professor of Economics.



EXECUTIVE SUMMARY

This is the fourth annual Southwest Florida workforce overview study providing key information about industries, occupations, employment gaps, and projected job growth. The study is divided into three major sections:

- ✓ Historic, current, and projected employment by industry
- ✓ Employment gaps by occupation as of Summer 2016
- ✓ Projected employment demand by occupation

This information can be used by key stakeholders throughout the region to define the size of the regional employment gaps. In addition, the information will help students, parents, businesses, and educators make more informed decisions about careers, employees, and programs. Finally, the study helps researchers target future areas of investigation that will be needed to identify the regional specific skills, tasks, knowledge, abilities, and work activities for the occupational gaps identified by this study.

The study began in the middle of October 2016 and was completed by the end of that year. Primary data collection and analysis were conducted by Dr. Christopher Westley and the Regional Economic Research Institute at Florida Gulf Coast University. The predominant source of workforce data for the study was the Florida Department of Economic Opportunity. Final report development, editing, and formatting were supported by the Workforce Now team. The Southwest Florida region is defined as Charlotte, Collier, Glades, Hendry, and Lee Counties.



Historic, Current, and Projected Employment by Industry

- Economic recovery continues with employment and unemployment rates reaching levels closer to normal long-term values;
- Southwest Florida has 539,261 employed workers, compared to 9.68 million employed in Florida and 157.13 million for the nation;
- The average annual Southwest Florida wage is \$40,189 compared to \$45,562 for Florida and \$52,876 for the nation;
- The largest industries by employment are retail trade (19.0%), accommodation and food services (15.5%, same as last year), health care and social assistance (13.8%, down from 14.1% last year), construction (10.6%, up from 9.9% last year), and administrative and waste services (7.1%, same as last year);
- The largest industries by wage income are health care and social assistance (17.6%, down from 18.1% last year), retail trade (13.9%, up from 13.8%), construction (11.1%, up from 10.3%), professional and technical services (8.6%, up from 8.3%), and accommodation and food services (8.4%, same as last year, but down to 5th from 4th);
- The fastest growing industries between 2011 and 2015 as measured by employment are construction (12,241, or 50% of the overall increase in employment), accommodation and food services (11,919), retail trade (10,745), health care and social assistance (5,359), and administrative and waste services (5,327);
- The slowest growth industries from 2011 to 2015 have been utilities (-32), unclassified (18), management of companies and enterprises (92), mining, quarrying, and oil and gas extraction (132), and information (151);
- The fastest growth industries between 2016 and 2024 are projected to be health care and social assistance adding 1,442 jobs per year, retail trade adding 1,274 jobs per year, construction adding 1,072 jobs per year, accommodation and food services adding 988 jobs per year, and self-employed and unpaid family workers adding 726 jobs per year.

Historic, Current, and Projected Employment by Industry

Category	Industry/Region	Metric	Annual Change	Percent Change
Employed Workers, 2016	• Southwest Florida	539,261	14,484	2.8%
	• Florida	9.7 Million	0.1 Million	0.7%
	• United States	157.1 Million	1.2 Million	0.8%
Annual Wage, 2015	• Southwest Florida	\$40,189	\$1,337	3.4%
	• Florida	\$45,562	\$1,497	3.4%
	• United States	\$52,876	\$1,580	3.1%
Largest Industries by Employment, 2015	• Retail Trade	70,611	3,544	5.3%
	• Accommodation and Food Services	57,714	3,090	5.7%
	• Health Care and Social Assistance	51,478	1,759	3.5%
	• Construction	39,311	4,413	12.6%
	• Administrative and Waste Services	26,459	1,536	6.2%
Largest Industries by Wages, 2015	• Health Care and Social Assistance	\$2.6 Billion	\$0.2 Billion	6.1%
	• Retail Trade	\$2.1 Billion	\$0.2 Billion	9.5%
	• Construction	\$1.7 Billion	\$0.2 Billion	17.5%
	• Professional and Technical Services	\$1.3 Billion	\$0.2 Billion	13.2%
	• Accommodation and Food Services	\$1.3 Billion	\$0.1 Billion	8.6%
Fastest Growing Industries by Employment, 2011 to 2015 ^a	• Construction	12,241	4,667	61.6%
	• Accommodation and Food Services	11,919	1,263	11.9%
	• Retail Trade	10,745	2,014	23.1%
	• Health Care and Social Assistance	5,359	534	11.1%
	• Administrative and Waste Services	5,327	760	16.6%
Slowest Growing Industries by Employment, 2011 to 2015 ^a	• Utilities	-32	-56	-233.3%
	• Management of Companies and Enterprises	92	-691	-88.3%
	• Mining, Quarrying, and Oil and Gas Extraction	132	10	8.2%
	• Information	151	38	33.6%
	• Agriculture, Forestry, Fishing and Hunting	347	-1,113	-76.2%
Fastest Projected Growing Industries by Employment, 2016 to 2024 ^b	• Health Care and Social Assistance	1,442	-113	-7.3%
	• Retail Trade	1,274	144	12.7%
	• Construction	1,072	-1,107	-50.8%
	• Accommodation and Food Services	988	-152	-13.3%
	• Self-Employed and Unpaid Family Workers	726	-1	-0.1%

a Annual change and percent change compared to fastest/slowest growing industries by employment, 2010 to 2014 estimates.

b Annual change and percent change compared to fastest projected growing industries by Employment, 2015 to 2023 estimates.

Top 10 Short-Term Employment Gaps

Summer 2016

Occupation	Current Supply Gap	Current Employment	Median Wage	Minimum Education
First-Line Supervisors of Retail Sales Workers	-317	8,604	\$19.34	PS Adult Voc
First-Line Supervisors of Food Preparation and Serving Workers	-288	4,029	\$15.66	PS Adult Voc
Retail Salespersons	-262	24,434	\$11.11	HS/GED
Maintenance and Repair Workers, General	-154	5,406	\$16.32	PS Adult Voc
First-Line Supervisors of Construction Trades and Extraction Workers	-150	3,486	\$26.08	Some College
Landscaping and Groundskeeping Workers	-140	11,858	\$11.10	Less HS/GED
Securities, Commodities, and Financial Services Sales Agents	-123	724	\$34.64	Bachelor's
Registered Nurses	-114	9,364	\$29.49	Some College
First-Line Supervisors of Office and Administrative Support Workers	-108	4,285	\$22.32	Some College
Physical Therapists	-107	838	\$40.68	Master's or Higher

Source: Occupational Supply/Demand Report, Florida Department of Economic Opportunity

Current Employment Gaps by Occupation

The Florida Department of Economic Opportunity study/data identified 4,725 current employment gap positions for Southwest Florida, signifying a 40-percent increase (or 1,353 positions) compared to the figure reported in the Workforce Overview Study for 2015.

The top 10 employment gaps where demand is estimated to be greater than supply are shown in the table above. Two of the top 10 occupations are in the health care industry, which compares from four of the top 10 in the previous report. These include retail supervisors, supervisors for food preparation and serving, retail salespersons, maintenance and repair workers, construction trades supervisors, landscaping and groundskeepers, financial service sales agents, registered nurses, administrative supervisors, and physical therapists. The median wage varies from \$11.10 per hour to \$40.68 per hour.

- First line supervisors of retail salespersons had highest employment gap of -317. On average, each 10 jobs filled are worth an additional \$386,800 in income;
- First line supervisors of food preparation and serving workers had the second highest employment gap of -288. On average, each 10 jobs filled are worth an addition \$313,200 in income;
- Retail salespersons made up the next highest employment gap of -262. On average, for each 10 jobs filled, income would rise by \$222,200;
- Maintenance and repair workers employment gap was -154. For each 10 positions filled, \$326,400 in additional income is earned;
- First line supervisors in the construction trades' employment gap was -150. For each 10 positions filled, income would rise by \$521,600;
- Landscaping and groundskeeping workers employment gap was -140. On average, each 10 jobs filled would raise income by \$222,000;
- Securities, commodities, and financial service sales agents employment gap came next, registering -123. For each 10 vacancies filled, additional income of \$692,800 would be generated;
- The employment gap for registered nurse occupations, the top-ranked employment gap from last year when it totaled -534, registered -114 positions in the present study. For each 10 job vacancies filled, additional income of \$589,800 would be generated;

- Another occupational group is first line supervisors of office and administrative support workers. The study identified an employment gap of -108. On average, for each 10 job vacancies filled, additional income of \$446,400 would be generated;
- Rounding out the top 10 employment gaps were physical therapist occupations. The study found an employment gap of -107. For each 10 job vacancies filled, additional income of \$813,600 would be generated.
- Other employment gaps were found in product promoters, speech-language pathologists, sales representatives, fast food workers, housekeepers, tellers, carpenters, health service managers, electricians, and janitors.

Projected Employment Demand by Occupation

The top 10 projected high demand regional growth occupations for 2015 to 2023 are shown in the following table. The top growth occupation is retail salespersons with an average annual demand for 1,369 employees per year. This is followed by waiters and waitresses at 1,047 employees per year, food preparation and serving workers at 775 employees per year, cashiers at 692 employees per year, and landscaping and groundskeeping workers at 592 employees per year.

The next five highest occupations in demand are secretaries and administrative assistants, registered nurses, carpenters, customer service representatives, and construction laborers.

Top 10 Long-Term Growth Occupations 2015 to 2023				
Occupation	Average Annual Growth	Current Employment	Median Wage	Minimum Education
Retail Salespersons	1,369	24,434	\$11.11	HS/GED
Waiters and Waitresses	1,047	15,853	\$9.21	Less HS/GED
Combined Food Preparation and Serving Workers, Including Fast Food	775	11,736	\$9.17	Less HS/GED
Cashiers	692	13,071	\$9.42	HS/GED
Landscaping and Groundskeeping Workers	592	11,858	\$11.10	Less HS/GED
Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	460	11,579	\$14.75	PS Adult Voc
Registered Nurses	426	9,364	\$29.49	Some College
Carpenters	369	6,188	\$17.68	PS Adult Voc
Customer Service Representatives	365	7,443	\$14.67	PS Adult Voc
Construction Laborers	362	5,593	\$13.18	Less HS/GED

Source: Occupational Supply/Demand Report, Florida Department of Economic Opportunity

Projected Fastest-Growing Occupations by Minimal Education Requirement

The study finally looked at long-run occupational growth by identifying the fastest-growing occupations by the minimal educational requirement including:

- ✓ Post-Secondary Adult Vocational
- ✓ Some College
- ✓ Bachelor's Degree
- ✓ Master's Degree or Higher

Post-Secondary Adult Vocational

The top projected adult vocational education growth occupations are shown in the following table. These represent positions in sales, construction, food preparation, administrative support, health care, and maintenance and are expected to grow between 172 and 460 positions for each year from 2015 to 2023.

Top 10 Adult Vocational Growth Occupations 2015 to 2023			
Occupation	Average Annual Growth	Current Employment	Median Wage
Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	460	11,579	\$14.75
Carpenters	369	6,188	\$17.68
Customer Service Representatives	365	7,443	\$14.67
Cooks, Restaurant	309	6,750	\$11.37
Nursing Assistants	308	5,865	\$12.61
First-Line Supervisors of Retail Sales Workers	301	8,604	\$19.34
First-Line Supervisors of Food Preparation and Serving Workers	214	4,029	\$15.66
Painters, Construction and Maintenance	212	3,234	\$14.44
Maintenance and Repair Workers, General	200	5,406	\$16.32
Roofers	172	2,062	\$15.22

Source: Occupational Supply/Demand Report, Florida Department of Economic Opportunity

Some College

The top projected “some college” education growth occupations are shown in the following table. These represent positions in health care, construction, office and administrative support, management, and business and financial operations, and are expected to grow between 92 and 426 positions for each year from 2015 to 2023.

Top 10 Some College Growth Occupations 2015 to 2023			
Occupation	Average Annual Growth	Current Employment	Median Wage
Registered Nurses	426	9,364	\$29.49
First-Line Supervisors of Construction Trades and Extraction Workers	218	3,486	\$26.08
First-Line Supervisors of Office and Administrative Support Workers	191	4,285	\$22.32
Construction Managers	184	3,661	\$34.86
Bookkeeping, Accounting, and Auditing Clerks	169	5,279	\$16.47
General and Operations Managers	162	3,755	\$45.91
Farmers, Ranchers, and Other Agricultural Managers	118	7,358	\$32.30
Property, Real Estate, and Community Association Managers	118	2,797	\$26.85
Business Operations Specialists, All Other	107	2,703	\$28.41
Cost Estimators	92	1,031	\$25.17

Source: Occupational Supply/Demand Report, Florida Department of Economic Opportunity

Bachelor's Degree or Higher

The top projected Bachelor's degree or higher education growth occupations are shown in the following table. These represent positions in education, business and financial operations, health care, legal, and engineering and are expected to grow between 43 and 208 positions for each year from 2015 to 2023.

Top 10 Bachelor's or Higher Growth Occupations 2015 to 2023				
Occupation	Average Annual Growth	Current Employment	Median Wage	Minimum Education
Elementary School Teachers, Except Special Education	208	3,960	\$29.54	Bachelor's
Accountants and Auditors	189	3,668	\$29.03	Bachelor's
Secondary School Teachers, Except Special and Career/Technical Education	112	2,240	\$30.86	Bachelor's
Middle School Teachers, Except Special and Career/Technical Education	104	1,973	\$29.73	Bachelor's
Management Analysts	90	1,710	\$34.04	Bachelor's
Lawyers	65	1,809	\$39.83	Master's or higher
Family and General Practitioners	47	1,006	\$94.59	Master's or higher
Physical Therapists	47	838	\$40.68	Master's or higher
Kindergarten Teachers, Except Special Education	44	737	\$28.79	Bachelor's
Civil Engineers	43	685	\$39.06	Bachelor's

Source: Occupational Supply/Demand Report, Florida Department of Economic Opportunity

Summary and Recommendations

This fourth annual study provides an annual overview of Southwest Florida's labor market including identification of current employment gaps and projected growth occupations. The overall market assessment of the current and expected occupational needs is an important component in the development of new or modified educational programs. The information gathered in this report includes the median hourly wage and the minimum educational requirements complementing the other Workforce Now studies completed last year. In closing, the following recommendations are put forward by the study team:

1. A Southwest Florida Labor Market overview should be completed annually and timed to use the latest forecasts provided by the Florida Department of Economic Opportunity.
2. The labor market overviews should identify future research opportunities and collaborative opportunities for businesses and educators.
3. Further study of the employment gaps is needed to explore local skills, knowledge, tasks, abilities and activities required to fill the employment gaps and increased demand.
4. The data show consistency with those of last year, in terms of the positions listed, median wage, and minimum education required. There was a small amount of fluidity in the order and type of positions listed. For instance, registered nurses fell from 1st to 8th in terms of short-term employment gaps in the present survey; meanwhile, its median wage rose a mere 21 cents.

INTRODUCTION

Workforce Now is a regional initiative to better understand Southwest Florida's labor market including employment gaps, specific skills desired, and forecast occupational growth. This is the fourth in a series of Southwest Florida labor market overviews which are updated annually.

The purpose of this updated report is to conduct retrospective and prospective data analysis of information and forecasts from the Florida Department of Economic Opportunity to identify the mix of industries, the industry growth trends, current employment gaps, and the average annual projected demand for regional occupations through the year 2023.

The study was started in July 2016 and was completed at the end of that year. Primary data collection and analysis were conducted by Dr. Christopher Westley and the Regional Economic Research Institute at Florida Gulf Coast University. The final report development, editing, and formatting were supported by the Workforce Now research team. For the purposes of this study, the Southwest Florida region is defined as Charlotte, Collier, Glades, Hendry, and Lee Counties.



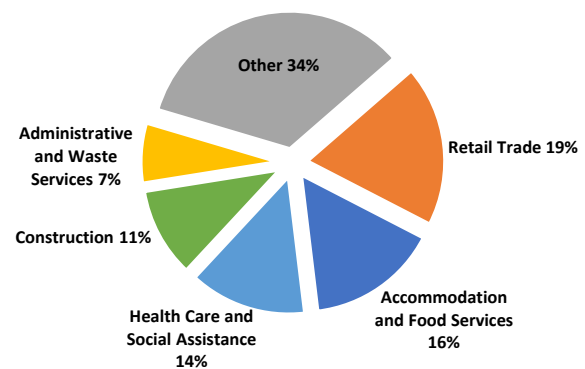
EMPLOYMENT AND INCOME RANKED BY INDUSTRY

Retail trade is the largest industry in Southwest Florida when ranked by employment, with 70,611 employees and 19 percent of all employment, as shown in Chart 1 and Table 1, based on the data provided by the Quarterly Census of Employment and Wages (QCEW). This data is based on employees covered by the Florida unemployment insurance (so it does not include workers who are self-employed).

The second largest industry employer is accommodation and food services, with 57,714 employees and 15.5 percent of regional employment. The third largest industry is health care and social assistance at 51,478, which represents 13.8 percent of the region's employment. Construction continues to rebound from the recession and is the fourth largest industry with 39,311 employees and 10.6 percent of the region's employment. While the top four industries comprise 58.9 percent of the region's workforce, it remained relatively consistent when compared to 2014, which made up 58.6 percent of the region's workforce. The fifth largest industry is administrative and waste services employing 26,459 and with 7.1 percent of the region's workforce. This industry includes many service-type occupations.



Chart 1: Southwest Florida Employment by Industry, 2015



Source: Quarterly Census of Employment and Wages, Bureau of Labor Statistics

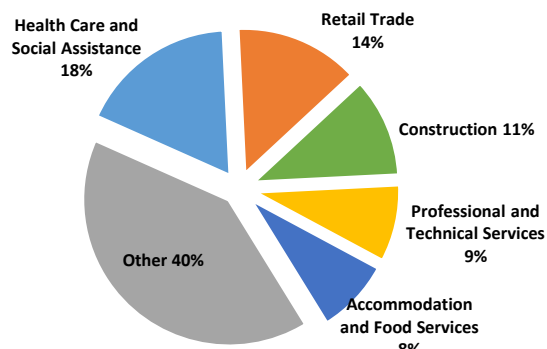
Table 1: Southwest Florida Employment by Industry
2015

Industry	Average Monthly Employment	Percent of Total Employment
Retail Trade	70,611	19.0%
Accommodation and Food Services	57,714	15.5%
Health Care and Social Assistance	51,478	13.8%
Construction	39,311	10.6%
Administrative and Waste Services	26,459	7.1%
Professional and Technical Services	19,834	5.3%
Arts, Entertainment, and Recreation	16,152	4.3%
Other Services, Except Public Administration	15,476	4.2%
Agriculture, Forestry, Fishing and Hunting	11,940	3.2%
Finance and Insurance	10,864	2.9%
Other Industry Sectors	52,380	14.1%
Total, All Industries	372,219	100.0%

Source: Quarterly Census of Employment and Wages, Bureau of Labor Statistics

The largest contribution to total wage income is health care and social assistance—with average annual wage expenditures of \$2.6 billion—representing 17.6 percent of total wage expenditures in Southwest Florida. Retail trade is the next largest industry in terms of total wage expenditure, with 13.9 percent of the region’s total annual wage and expenditures of \$2.1 billion. The third largest industry measured by total wage expenditures is construction, with 11.1 percent of the total regional wage expenditures at \$1.7 billion. Professional and technical services is the fourth largest industry as measured by total wages at \$1.3 billion or 8.6 percent of the region’s total wage expenditures. Finally, accommodation and food services is the fifth largest in terms of total wage expenditures, with \$1.3 billion or 8.4 percent of the region’s total wage expenditures. The total wage expenditures by industry are shown in Chart 2 and Table 2.

Chart 2: Southwest Florida Total Wages by Industry, 2015



Source: Quarterly Census of Employment and Wages, Bureau of Labor Statistics

Table 2: Southwest Florida Total Wages by Industry
2015

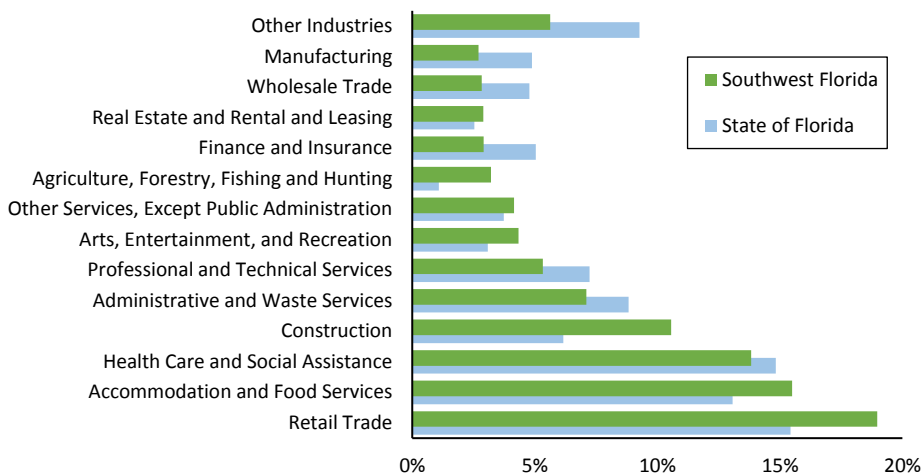
Industry	Total Wages (Billions of Dollars)	Percent of Total Wages
Health Care and Social Assistance	2.63	17.6%
Retail Trade	2.07	13.9%
Construction	1.66	11.1%
Professional and Technical Services	1.29	8.6%
Accommodation and Food Services	1.25	8.4%
Finance and Insurance	0.88	5.9%
Administrative and Waste Services	0.86	5.8%
Wholesale Trade	0.66	4.4%
Real Estate and Rental and Leasing	0.54	3.6%
Manufacturing	0.52	3.5%
Other Industry Sectors	2.60	17.4%
Total, All Industries	14.96	100.0%

Source: Quarterly Census of Employment and Wages, Bureau of Labor Statistics

SOUTHWEST FLORIDA INDUSTRY MIX COMPARED TO THE STATE OF FLORIDA

Southwest Florida has a higher percentage of employees in retail trade, accommodation and food services, construction, arts, entertainment, and recreation, real estate and rental and leasing, and agriculture, forestry, fishing and hunting, when compared to the State of Florida, as shown in Chart 3 and Table 3. Southwest Florida's comparative advantage as a preferred location for tourism and retirement certainly helps to explain why the region differs from the state-level percentages. The largest differentials are in the areas, respectively, of construction and retail trade.

Chart 3: Southwest Florida vs. State of Florida Employment, 2015



Source: Quarterly Census of Employment and Wages, Bureau of Labor Statistics

The region has a smaller percentage of employment than the state in manufacturing, finance and insurance, professional and technical services, health care and social assistance, administrative and waste services, and wholesale trade. Manufacturing employment in Southwest Florida is only 2.7 percent of employment, compared to 4.9 percent for the state as whole.

Table 3: Southwest Florida vs. State of Florida Employment
2015

Industry	State of Florida	Southwest Florida
Retail Trade	15.4%	19.0%
Accommodation and Food Services	13.1%	15.5%
Health Care and Social Assistance	14.8%	13.8%
Construction	6.2%	10.6%
Administrative and Waste Services	8.8%	7.1%
Professional and Technical Services	7.2%	5.3%
Arts, Entertainment, and Recreation	3.1%	4.3%
Other Services, Except Public Administration	3.7%	4.2%
Agriculture, Forestry, Fishing and Hunting	1.1%	3.2%
Finance and Insurance	5.0%	2.9%
Real Estate and Rental and Leasing	2.5%	2.9%
Wholesale Trade	4.8%	2.8%
Manufacturing	4.9%	2.7%
Other Industries	9.3%	5.6%

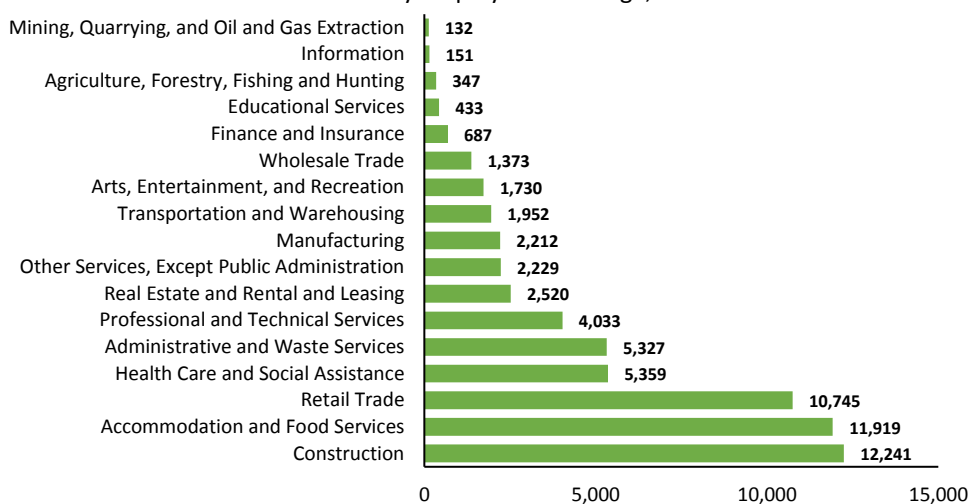
Source: Quarterly Census of Employment and Wages, Bureau of Labor Statistics

FASTEST AND SLOWEST GROWTH INDUSTRIES, 2011 TO 2015

Southwest Florida's economic growth continued to strengthen from 2011 to 2015. During the time period, the region has experienced an increase of 63,318 employees. The fastest growing industries from 2011 to 2015 were construction, accommodation and food services, retail trade, health care and social assistance, and administrative and waste services. The slowest-growing industries were utilities, management of companies and enterprises, mining, quarrying, and oil and natural gas, and information (media), as shown in Table 4 and Chart 4.

While the construction industry continues to recover from the recession, both the accommodation and food services and retail trade have grown immensely since 2011. The growth can be attributed to an increasing population in the region, along with increases in tourism as well. While most industries were shown to have growth over this time period, only utilities had contraction from 2011 to 2015.

Chart 4: Industry Employment Change, 2011 to 2015



Source: Quarterly Census of Employment and Wages, Bureau of Labor Statistics

Table 4: Industry Employment Change
2011 to 2015

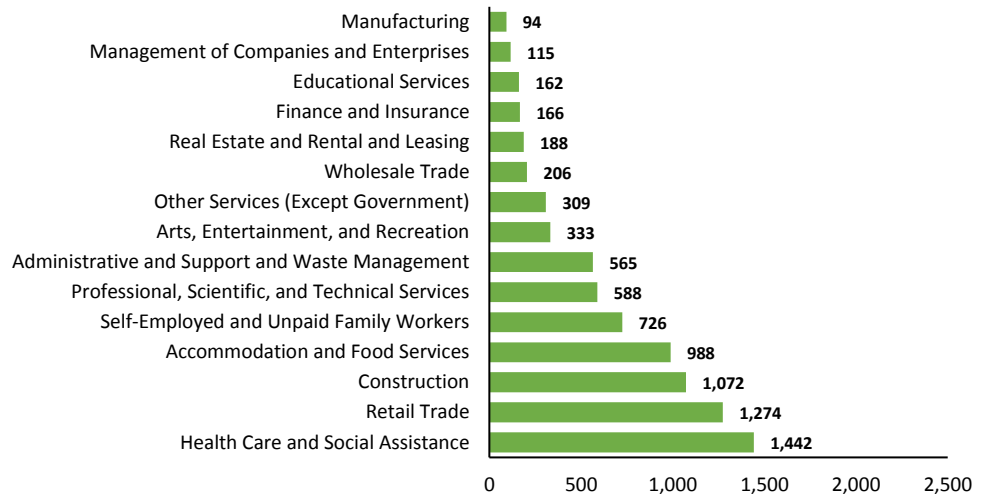
Industry	Growth	Percent
Construction	12,241	45.2%
Accommodation and Food Services	11,919	26.0%
Retail Trade	10,745	17.9%
Health Care and Social Assistance	5,359	11.6%
Administrative and Waste Services	5,327	25.2%
Professional and Technical Services	4,033	25.5%
Real Estate and Rental and Leasing	2,520	30.4%
Other Services, Except Public Administration	2,229	16.8%
Manufacturing	2,212	28.1%
Transportation and Warehousing	1,952	43.7%
Arts, Entertainment, and Recreation	1,730	12.0%
Wholesale Trade	1,373	15.0%
Finance and Insurance	687	6.8%
Educational Services	433	10.6%
Agriculture, Forestry, Fishing and Hunting	347	3.0%
Information	151	3.1%
Mining, Quarrying, and Oil and Gas Extraction	132	66.7%
Management of Companies and Enterprises	92	2.7%
Utilities	-32	-2.7%

Source: Quarterly Census of Employment and Wages, Bureau of Labor Statistics

PROJECTED INDUSTRY EMPLOYMENT GROWTH, 2016 TO 2024

Each year, the Florida Department of Economic Opportunity provides an employment forecast by industry, which is shown in Chart 5 and Table 5. Health care and social assistance is projected to be the fastest-growing industry in Southwest Florida, adding an average of 1,442 employees each year from 2016 to 2024. Retail trade is projected to add the second largest number of employees, adding 1,274 per year. This is followed by construction at 1,072 employees per year, accommodation and food services at 988 employees per year, and self-employed and unpaid family workers at 726 employees per year. Professional, scientific, and technical services are projected to add 588 employees per year, administrative, support and waste management are projected to add 565 per year and arts, entertainment, and recreation is projected to add 333 per year. The “other services” industry is projected to grow by 309 employees per year, wholesale trade by 206 employees per year, real estate by 188 employees per year, finance and insurance by 166 employees per year, educational services by 162 employees per year, management of companies by 115 employees per year, and manufacturing by 94 employees per year.

Chart 5: Projected Average Annual Employment Change, 2016 to 2024



Source: Employment Projections, Florida Department of Economic Opportunity

Table 5: Projected Average Annual Employment Change by Industry
2016 to 2024

Industry	Average Annual Increase	Average Annual Percentage Increase
Health Care and Social Assistance	1,442	2.7%
Retail Trade	1,274	1.7%
Construction	1,072	2.5%
Accommodation and Food Services	988	1.6%
Self-Employed and Unpaid Family Workers	726	1.7%
Professional, Scientific, and Technical Services	588	2.6%
Administrative and Support and Waste Management	565	1.9%
Arts, Entertainment, and Recreation	333	2.0%
Other Services (Except Government)	309	1.6%
Wholesale Trade	206	1.7%
Real Estate and Rental and Leasing	188	1.6%
Finance and Insurance	166	1.4%
Educational Services	162	2.8%
Management of Companies and Enterprises	115	3.2%
Manufacturing	94	0.9%
Other	18	0.1%
Total, All Industries	8,244	1.8%

Source: Employment Projections, Florida Department of Economic Opportunity

OCCUPATIONAL EMPLOYMENT GAPS

The study team worked with the Florida Department of Economic Opportunity to identify estimates of the most recent Southwest Florida employment gaps by using online job postings and graduations to identify summer 2016 employment gaps. Employment gaps are defined as summer 2016 demand minus the supply of applicants and graduates. The overall employment gap identified by this study using the Florida Department of Economic Opportunity demand and supply analysis was approximately 4,725 positions.

Employment gaps are positions that have a regional demand greater than the estimated supply available for the Southwest Florida market. Some of these positions will be filled from outside the region, firms may hire less qualified candidates, or the positions may be left vacant for an extended period of time. It is our hope that identifying these regional employment gaps can assist parents, students, employers, and educators in identifying potential opportunities.

The top 10 employment gaps were for first-line supervisors of retail sales, first-line supervisors of food preparation and service, retail salespersons, maintenance and repair workers, first-line supervisors of construction trades, landscaping and groundskeeping workers, financial services sales agents, registered nurses, first-line supervisors of office workers, and physical therapists. The employment gap, current employment level, median wage and minimum educational requirements for the top 10 employment gaps are shown in Table 6. The median hourly wages for the top 10 employment gaps ranged from \$11.10 per hour to \$40.68 per hour. The minimum education requirements for each occupation varied from less than high school to at least a master's degree.

A complete list of the top 50 employment gaps in Southwest Florida can be found in the Appendix.

Table 6: Top Employment Gaps
Summer 2016

Occupation	Current Supply Gap	Current Employment	Median Wage	Minimum Education
First-Line Supervisors of Retail Sales Workers	-317	8,604	\$19.34	PS Adult Voc
First-Line Supervisors of Food Preparation and Serving Workers	-288	4,029	\$15.66	PS Adult Voc
Retail Salespersons	-262	24,434	\$11.11	HS/GED
Maintenance and Repair Workers, General	-154	5,406	\$16.32	PS Adult Voc
First-Line Supervisors of Construction Trades and Extraction Workers	-150	3,486	\$26.08	Some College
Landscaping and Groundskeeping Workers	-140	11,858	\$11.10	Less HS/GED
Securities, Commodities, and Financial Services Sales Agents	-123	724	\$34.64	Bachelor's
Registered Nurses	-114	9,364	\$29.49	Some College
First-Line Supervisors of Office and Administrative Support Workers	-108	4,285	\$22.32	Some College
Physical Therapists	-107	838	\$40.68	Master's or Higher

Source: Occupational Supply/Demand Report, Florida Department of Economic Opportunity

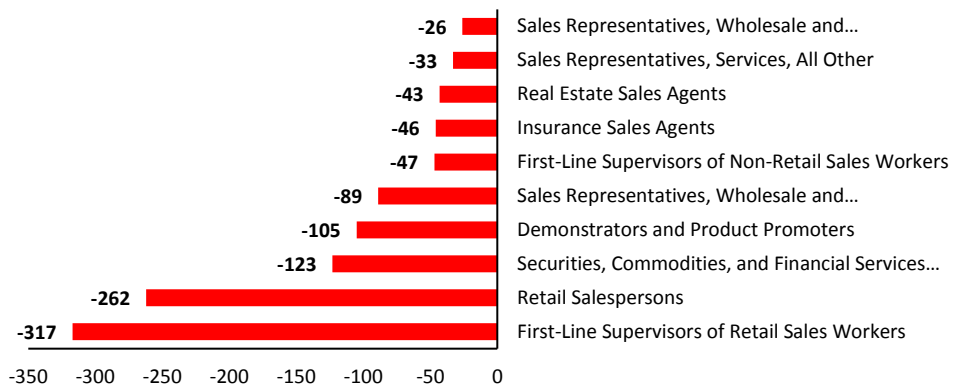
CURRENT EMPLOYMENT GAPS BY MAJOR OCCUPATIONAL GROUP

The Southwest Florida employment gaps can also be viewed by major occupational groups. The largest occupations groups, ranked by total employment gaps, include sales, health care, construction, food preparation, maintenance, building and grounds cleaning, administrative, business, transportation, and management. More information on the largest occupation groups can be found below.

Sales Occupations

The overall employment gap identified for sales occupations was approximately 1,153 positions. The top 10 employment gaps for sales occupations include first-line supervisors of retail sales, retail salespersons, financial services sales agents, demonstrators and product promoters, sales representatives (except technical and scientific products), first-line supervisors of non-retail sales, insurance sales agents, real estate sales agents, sales representatives for other services, and sales representatives for technical and scientific products. The median wage for the top 10 employment gaps in sales occupations ranged from \$10.63 per hour to \$34.64 per hour. Minimum education for these occupations ranged from high school or GED to Bachelor's degree. More information can be found in Table 7 and Chart 6.

Chart 6: Supply Gap for Sales, Summer 2016



Source: Occupational Supply/Demand Report, Florida Department of Economic Opportunity

Table 7: Sales and Related Occupations
Summer 2016

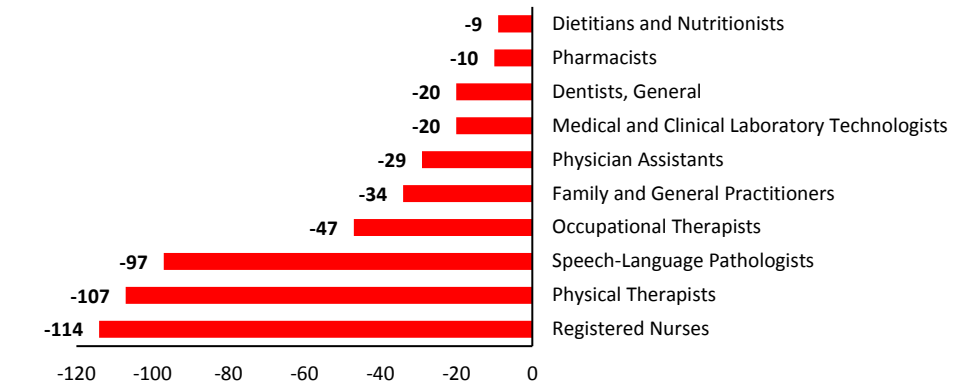
Occupation	Supply Gap	Current Employment	Median Wage	Minimum Education
First-Line Supervisors of Retail Sales Workers	-317	8,604	\$19.34	PS Adult Voc
Retail Salespersons	-262	24,434	\$11.11	HS/GED
Securities, Commodities, and Financial Services Sales Agents	-123	724	\$34.64	Bachelor's
Demonstrators and Product Promoters	-105	255	\$10.63	HS/GED
Sales Representatives, Wholesale and Manufacturing, Except Technical and Scientific Products	-89	4,395	\$20.79	PS Adult Voc
First-Line Supervisors of Non-Retail Sales Workers	-47	1,075	\$30.48	Some College
Insurance Sales Agents	-46	1,752	\$22.21	PS Adult Voc
Real Estate Sales Agents	-43	3,870	\$17.98	PS Adult Voc
Sales Representatives, Services, All Other	-33	4,473	\$25.08	HS/GED
Sales Representatives, Wholesale and Manufacturing, Technical and Scientific Products	-26	549	\$32.57	PS Adult Voc

Source: Occupational Supply/Demand Report, Florida Department of Economic Opportunity

Health Care Occupations

The overall employment gap identified for health care occupations was approximately 518 positions. The top 10 employment gaps for health care occupations include registered nurses, physical therapists, speech-language pathologists, occupational therapists, family and general practitioners, physician assistants, medical and clinical laboratory technologists, dentists, pharmacists, and dietitians and nutritionists. The median wage for the top 10 employment gaps in health care occupations ranged from \$25.61 per hour to \$94.59 per hour. Minimum education for these occupations ranged from some college to Master's Degree or higher. More information can be found in Table 8 and Chart 7.

Chart 7: Supply Gap for Healthcare, Summer 2016



Source: Occupational Supply/Demand Report, Florida Department of Economic Opportunity

Table 8: Healthcare Practitioners and Technical Occupations
Summer 2016

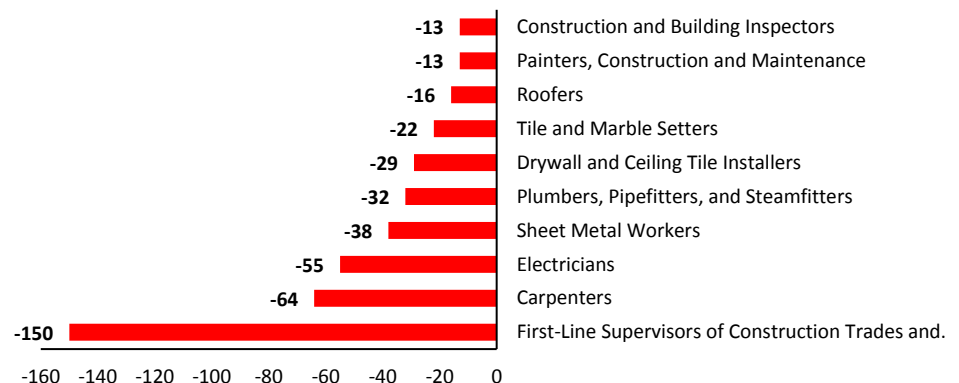
Occupation	Supply Gap	Current Employment	Median Wage	Minimum Education
Registered Nurses	-114	9,364	\$29.49	Some College
Physical Therapists	-107	838	\$40.68	Master's or Higher
Speech-Language Pathologists	-97	401	\$37.41	Master's or Higher
Occupational Therapists	-47	338	\$42.38	Master's or Higher
Family and General Practitioners	-34	1,006	\$94.59	Master's or Higher
Physician Assistants	-29	386	\$48.77	Bachelor's
Medical and Clinical Laboratory Technologists	-20	433	\$27.73	Some College
Dentists, General	-20	672	\$61.03	Master's or Higher
Pharmacists	-10	962	\$59.12	Master's or Higher
Dietitians and Nutritionists	-9	178	\$25.61	Bachelor's

Source: Occupational Supply/Demand Report, Florida Department of Economic Opportunity

Construction Occupations

The overall employment gap identified for construction occupations was approximately 507 positions. The top 10 employment gaps for construction occupations include first-line supervisors of construction workers, carpenters, electricians, sheet metal workers, plumbers, pipefitters, and steamfitters, drywall and ceiling tile installers, roofers, painters, and construction and building inspectors. The median wage for the top 10 employment gaps in construction occupations ranged from \$14.27 per hour to \$27.69 per hour. Minimum

Chart 8: Supply Gap for Construction, Summer 2016



Source: Occupational Supply/Demand Report, Florida Department of Economic Opportunity

education for these occupations ranged from post-secondary adult vocational to some college. More information can be found in Table 9 and Chart 8.

Table 9: Construction and Extraction Occupations
Summer 2016

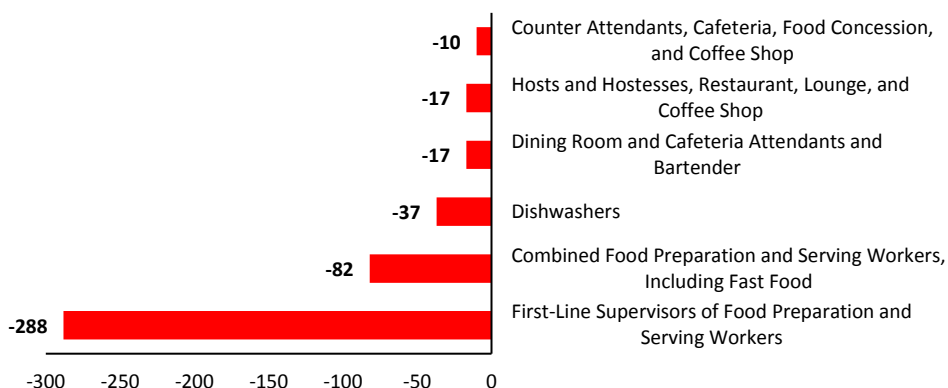
Occupation	Supply Gap	Current Employment	Median Wage	Minimum Education
First-Line Supervisors of Construction Trades and Extraction Workers	-150	3,486	\$26.08	Some College
Carpenters	-64	6,188	\$17.68	PS Adult Voc
Electricians	-55	2,432	\$17.86	PS Adult Voc
Sheet Metal Workers	-38	679	\$15.17	PS Adult Voc
Plumbers, Pipefitters, and Steamfitters	-32	1,848	\$18.89	PS Adult Voc
Drywall and Ceiling Tile Installers	-29	535	\$14.27	PS Adult Voc
Tile and Marble Setters	-22	722	\$17.81	PS Adult Voc
Roofers	-16	2,062	\$15.22	PS Adult Voc
Painters, Construction and Maintenance	-13	3,234	\$14.44	PS Adult Voc
Construction and Building Inspectors	-13	452	\$27.69	PS Adult Voc

Source: Occupational Supply/Demand Report, Florida Department of Economic Opportunity

Food Preparation Occupations

The overall employment gap identified for food preparation occupations was approximately 507 positions. The top employment gaps for food preparation occupations include first-line supervisors of food preparation workers, food preparation workers (including fast food), dishwashers, dining room and cafeteria attendants, restaurant hosts and hostesses, and counter attendants and food concessions. The median wage for the top employment gaps in food preparation occupations ranged from \$9.04 per hour to \$15.66 per hour. Minimum education for these occupations ranged from less than high school to post-secondary adult vocational. More information can be found in Table 10 and Chart 9.

Chart 9: Supply Gap for Food Preparation, Summer 2016



Source: Occupational Supply/Demand Report, Florida Department of Economic Opportunity

Table 10: Food Preparation and Service Occupations
Summer 2016

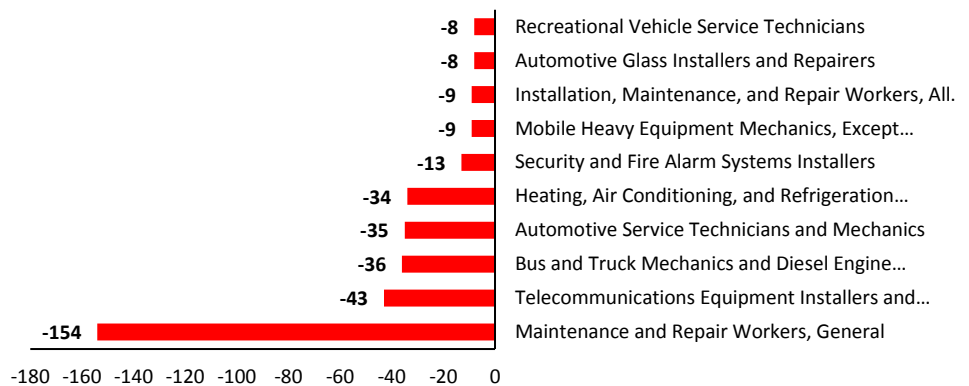
Occupation	Supply Gap	Current Employment	Median Wage	Minimum Education
First-Line Supervisors of Food Preparation and Serving Workers	-288	4,029	\$15.66	PS Adult Voc
Combined Food Preparation and Serving Workers, Including Fast Food	-82	11,736	\$9.17	Less HS/GED
Dishwashers	-37	2,564	\$9.28	Less HS/GED
Dining Room and Cafeteria Attendants and Bartender	-17	2,649	\$9.44	Less HS/GED
Hosts and Hostesses, Restaurant, Lounge, and Coffee Shop	-17	2,187	\$10.09	Less HS/GED
Counter Attendants, Cafeteria, Food Concession, and Coffee Shop	-10	1,681	\$9.04	Less HS/GED

Source: Occupational Supply/Demand Report, Florida Department of Economic Opportunity

Maintenance Occupations

The overall employment gap identified for maintenance occupations was approximately 382 positions. The top 10 employment gaps for maintenance occupations include maintenance and repair workers, telecommunication equipment installers, bus and truck mechanics, automotive service technicians, heating, air conditioning and refrigeration mechanics, security and fire alarm installers, mobile heavy equipment mechanics, maintenance and repair workers (all other), automotive glass installers, and recreational vehicle service technicians. The median wage for the top employment gaps in maintenance occupations ranged from \$14.15 per hour to \$26.36 per hour. Minimum education for these occupations ranged from less than high school to post-secondary adult vocational. More information can be found in Table 11 and Chart 10.

Chart 10: Supply Gap for Maintenance, Summer 2016



Source: Occupational Supply/Demand Report, Florida Department of Economic Opportunity

Table 11: Installation, Maintenance, and Repair Occupations
Summer 2016

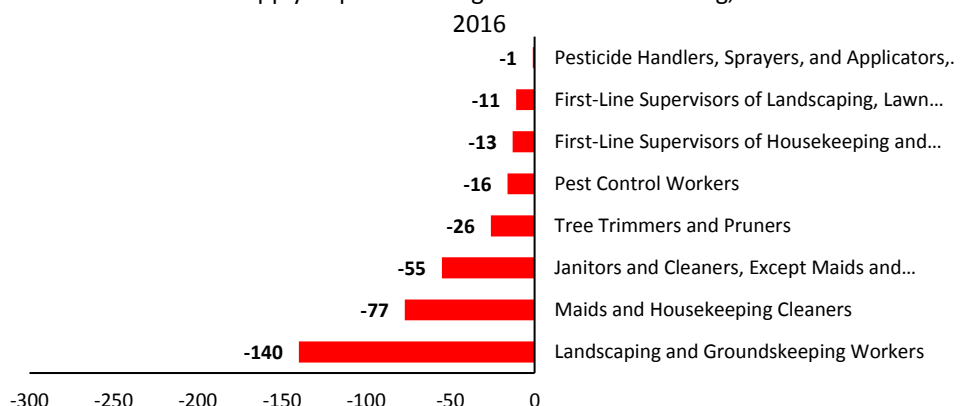
Occupation	Supply Gap	Current Employment	Median Wage	Minimum Education
Maintenance and Repair Workers, General	-154	5,406	\$16.32	PS Adult Voc
Telecommunications Equipment Installers and Repair	-43	840	\$26.36	PS Adult Voc
Bus and Truck Mechanics and Diesel Engine Specialists	-36	498	\$19.66	PS Adult Voc
Automotive Service Technicians and Mechanics	-35	3,293	\$19.12	PS Adult Voc
Heating, Air Conditioning, and Refrigeration Mechanics and Installers	-34	2,120	\$18.15	PS Adult Voc
Security and Fire Alarm Systems Installers	-13	318	\$19.90	PS Adult Voc
Mobile Heavy Equipment Mechanics, Except Engines	-9	234	\$18.94	PS Adult Voc
Installation, Maintenance, and Repair Workers, All Other	-9	1,628	\$14.15	HS/GED
Automotive Glass Installers and Repairers	-8	N/R	\$16.83	Less HS/GED
Recreational Vehicle Service Technicians	-8	N/R	N/R	PS Adult Voc

Source: Occupational Supply/Demand Report, Florida Department of Economic Opportunity

Building and Grounds Cleaning Occupations

The overall employment gap identified for building and grounds cleaning occupations was approximately 339 positions. The top 10 employment gaps for building and grounds keeping occupations include landscaping and groundskeeping workers, housekeeping cleaners, janitors and cleaners, tree trimmers and pruners, pest control workers, first-line supervisors of janitorial workers, first-line supervisors of groundskeeping workers, and pesticide handlers. The median wage for the top employment gaps in building and

Chart 11: Supply Gap for Building and Grounds Cleaning, Summer 2016



Source: Occupational Supply/Demand Report, Florida Department of Economic Opportunity

grounds cleaning occupations ranged from \$10.22 per hour to \$20.47 per hour. Minimum education for these occupations ranged from less than high school to some college. More information can be found in Table 12 and Chart 11.

Table 12: Building and Grounds Cleaning Occupations
Summer 2016

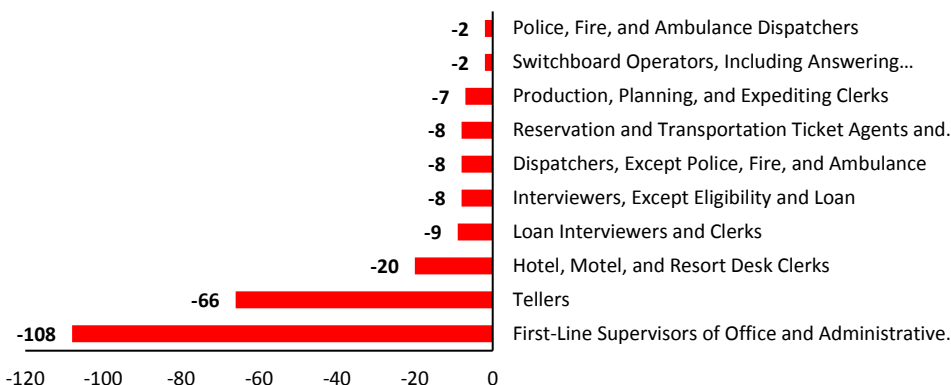
Occupation	Supply Gap	Current Employment	Median Wage	Minimum Education
Landscaping and Groundskeeping Workers	-140	11,858	\$11.10	Less HS/GED
Maids and Housekeeping Cleaners	-77	5,494	\$10.22	Less HS/GED
Janitors and Cleaners, Except Maids and Housekeeping Cleaners	-55	5,449	\$11.34	Less HS/GED
Tree Trimmers and Pruners	-26	N/R	\$13.67	Less HS/GED
Pest Control Workers	-16	N/R	\$12.27	PS Adult Voc
First-Line Supervisors of Housekeeping and Janitorial Workers	-13	1,009	\$18.32	PS Adult Voc
First-Line Supervisors of Landscaping, Lawn Service, and Groundskeeping Workers	-11	2,836	\$20.47	PS Adult Voc
Pesticide Handlers, Sprayers, and Applicators, Vegetation	-1	416	\$16.45	Some College

Source: Occupational Supply/Demand Report, Florida Department of Economic Opportunity

Administrative Occupations

The overall employment gap identified for administrative occupations was approximately 243 positions. The top 10 employment gaps for administrative occupations include first-line supervisors for administrative workers, tellers, hotel desk clerks, loan clerks, interviewers (except loan), dispatchers (except police, fire, and ambulance), reservation ticket agents, switchboard operators, and police, fire, and ambulance dispatchers. The median wage for the top employment gaps in administrative occupations ranged from \$11.65 per hour to \$22.32 per hour. Minimum education for these occupations ranged from high school diploma to some college. More information can be found in Table 13 and Chart 12.

Chart 12: Supply Gap for Administrative, Summer 2016



Source: Occupational Supply/Demand Report, Florida Department of Economic Opportunity

Table 13: Office and Administrative Support Occupations
Summer 2016

Occupation	Supply Gap	Current Employment	Median Wage	Minimum Education
First-Line Supervisors of Office and Administrative Support Workers	-108	4,285	\$22.32	Some College
Tellers	-66	2,116	\$13.54	PS Adult Voc
Hotel, Motel, and Resort Desk Clerks	-20	1,390	\$11.65	HS/GED
Loan Interviewers and Clerks	-9	368	\$16.99	PS Adult Voc
Interviewers, Except Eligibility and Loan	-8	391	\$14.32	HS/GED
Dispatchers, Except Police, Fire, and Ambulance	-8	555	\$15.49	HS/GED
Reservation and Transportation Ticket Agents and Travel Clerks	-8	642	\$13.08	HS/GED
Production, Planning, and Expediting Clerks	-7	137	\$17.26	HS/GED
Switchboard Operators, Including Answering Service	-2	394	\$11.71	HS/GED
Police, Fire, and Ambulance Dispatchers	-2	320	\$18.00	PS Adult Voc

Source: Occupational Supply/Demand Report, Florida Department of Economic Opportunity

Business Occupations

The overall employment gap identified for business occupations was approximately 175 positions. The top 10 employment gaps for business occupations include loan officers, personal financial advisors, claims adjusters, training and development specialists, market research analysts, purchasing agents (except wholesale, retail, and farm products), accountants and auditors, human resources specialists, cost estimators, and compensation specialists. The median wage for the top employment gaps in business occupations ranged from \$23.21 per hour to \$39.36 per hour. Minimum education for these occupations ranged from post-secondary adult vocational to Bachelor's Degree. More information can be found in Table 14 and Chart 13.

Chart 13: Supply Gap for Business, Summer 2016



Source: Occupational Supply/Demand Report, Florida Department of Economic Opportunity

Table 14: Business and Financial Occupations
Summer 2016

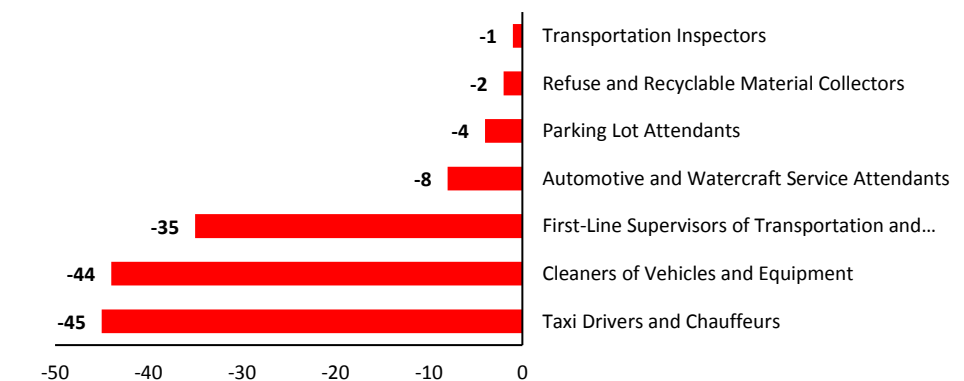
Occupation	Supply Gap	Current Employment	Median Wage	Minimum Education
Loan Officers	-55	632	\$37.94	Some College
Personal Financial Advisors	-28	895	\$39.36	Bachelor's
Claims Adjusters, Examiners, and Investigators	-18	411	\$24.11	PS Adult Voc
Training and Development Specialists	-15	519	\$26.03	Bachelor's
Market Research Analysts and Marketing Specialists	-13	595	\$25.14	Bachelor's
Purchasing Agents, Except Wholesale, Retail, and Farm Products	-13	429	\$23.21	Some College
Accountants and Auditors	-8	3,668	\$29.03	Bachelor's
Human Resources Specialists	-7	983	\$24.15	Some College
Cost Estimators	-5	1,031	\$25.17	Some College
Compensation, Benefits, and Job Analysis Specialists	-5	137	\$27.26	Some College

Source: Occupational Supply/Demand Report, Florida Department of Economic Opportunity

Transportation Occupations

The overall employment gap identified for transportation occupations was approximately 139 positions. The top employment gaps for transportation occupations include taxi drivers, cleaners of vehicles and equipment, first-line supervisors of vehicle operators, automotive service attendants, parking lot attendants, refuse material collectors, transportation inspectors. The median wage for the top employment gaps in transportation occupations ranged from \$9.16 per hour to \$24.74 per hour. Minimum education for these occupations ranged from less than high school to post-secondary adult vocational. More information can be found in Table 15 and Chart 14.

Chart 14: Supply Gap for Transportation, Summer 2016



Source: Occupational Supply/Demand Report, Florida Department of Economic Opportunity

Table 15: Transportation and Material Moving Occupations

Summer 2016

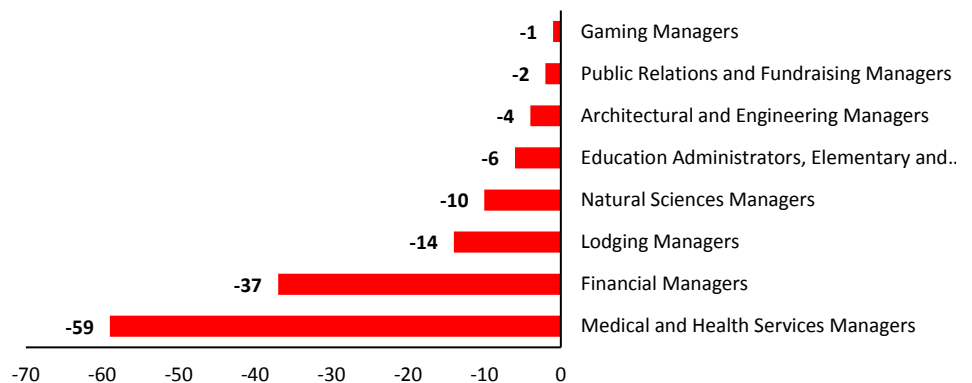
Occupation	Supply Gap	Current Employment	Median Wage	Minimum Education
Taxi Drivers and Chauffeurs	-45	1,048	\$9.98	Less HS/GED
Cleaners of Vehicles and Equipment	-44	1,493	\$9.64	Less HS/GED
First-Line Supervisors of Transportation and Material-Moving Machine and Vehicle Operators	-35	395	\$24.74	PS Adult Voc
Automotive and Watercraft Service Attendants	-8	333	\$10.96	Less HS/GED
Parking Lot Attendants	-4	430	\$9.16	Less HS/GED
Refuse and Recyclable Material Collectors	-2	305	\$9.35	Less HS/GED
Transportation Inspectors	-1	N/R	N/R	HS/GED

Source: Occupational Supply/Demand Report, Florida Department of Economic Opportunity

Management Occupations

The overall employment gap identified for management occupations was approximately 133 positions. The top employment gaps for management occupations include health service managers, financial managers, lodging managers, natural sciences managers, education administrators, engineering managers, public relations managers, and gaming managers. The median wage for the top employment gaps in management occupations ranged from \$29.13 per hour to \$56.60 per hour. Minimum education for these occupations ranged from post-secondary adult vocational to Bachelor's Degree. More information can be found in Table 16 and Chart 15.

Chart 15: Supply Gap for Management, Summer 2016



Source: Occupational Supply/Demand Report, Florida Department of Economic Opportunity

Table 16: Management Occupations

Summer 2016

Occupation	Supply Gap	Current Employment	Median Wage	Minimum Education
Medical and Health Services Managers	-59	665	\$47.99	Bachelor's
Financial Managers	-37	796	\$50.41	Bachelor's
Lodging Managers	-14	130	\$29.13	Some College
Natural Sciences Managers	-10	39	\$48.69	Bachelor's
Education Administrators, Elementary and Secondary	-6	263	\$49.83	Bachelor's
Architectural and Engineering Managers	-4	235	\$56.60	Bachelor's
Public Relations and Fundraising Managers	-2	42	\$51.33	Bachelor's
Gaming Managers	-1	N/R	N/R	PS Adult Voc

Source: Occupational Supply/Demand Report, Florida Department of Economic Opportunity

LONG-TERM AVERAGE ANNUAL EMPLOYMENT GROWTH BY OCCUPATION, 2015 TO 2023

The Florida Department of Economic Opportunity provided its forecast average annual demand for Southwest Florida employees for the period 2015 to 2023. This forecast provides additional information about expected annual occupational demands for the region. Information is presented for the top 10 growth occupations along with the current hourly wage and educational requirements. The top 10 employment growth occupations are retail salespersons, waiters and waitresses, food preparation and serving workers, cashiers, landscaping and groundskeepers, secretaries and administrative assistants, registered nurses, carpenters, customer service representatives, and construction laborers.

Table 17 provides the average annual growth for the top 10 employment growth occupations, along with the current median wage and minimum educational requirement. The top 10 growth occupations primarily reflect expected increases in retail, tourism, health care, and construction. Four of the top growth occupations require less than a high school degree, two require a high school degree or GED, three require adult vocational training, and one requires some college. Median wage varied from \$9 per hour to \$29 per hour and was highly correlated with the required minimum education.

A complete list of the top 50 long-term annual employment growth occupations in Southwest Florida can be found in the Appendix.

Table 17: Top 10 Long-Term Employment Growth Occupations
2015 to 2023

Occupation	Average Annual Growth	Current Employment	Median Wage	Minimum Education
Retail Salespersons	1,369	24,434	\$11.11	HS/GED
Waiters and Waitresses	1,047	15,853	\$9.21	Less HS/GED
Combined Food Preparation and Serving Workers, Including Fast Food	775	11,736	\$9.17	Less HS/GED
Cashiers	692	13,071	\$9.42	HS/GED
Landscaping and Groundskeeping Workers	592	11,858	\$11.10	Less HS/GED
Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	460	11,579	\$14.75	PS Adult Voc
Registered Nurses	426	9,364	\$29.49	Some College
Carpenters	369	6,188	\$17.68	PS Adult Voc
Customer Service Representatives	365	7,443	\$14.67	PS Adult Voc
Construction Laborers	362	5,593	\$13.18	Less HS/GED

Source: Occupational Supply/Demand Report, Florida Department of Economic Opportunity

TOP GROWTH OCCUPATIONS BY MINIMUM EDUCATIONAL REQUIREMENT

The study looked at long-run occupational growth by identifying the fastest-growing occupations by the minimal educational requirement including:

- ✓ Post-Secondary Adult Vocational
- ✓ Some College
- ✓ Bachelor's Degree
- ✓ Master's Degree or Higher

Post-Secondary Adult Vocational

The expected top 10 long-run growth occupations requiring a minimum of post-secondary adult vocational training are secretaries and administrative assistants, carpenters, customer service representatives, cooks, nursing assistants, first-line supervisors of retail sales, first-line supervisors of food preparation workers, painters, maintenance and repair workers, and roofers. The top 20 average annual growth occupations for adult vocational, along with the median wage and current employment, can be found in table 18.

Table 18: Adult Vocational Long-term Growth Occupations
2015 to 2023

#	Occupation	Average Annual Growth	Current Employment	Median Wage
1	Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	460	11,579	\$14.75
2	Carpenters	369	6,188	\$17.68
3	Customer Service Representatives	365	7,443	\$14.67
4	Cooks, Restaurant	309	6,750	\$11.37
5	Nursing Assistants	308	5,865	\$12.61
6	First-Line Supervisors of Retail Sales Workers	301	8,604	\$19.34
7	First-Line Supervisors of Food Preparation and Serving Workers	214	4,029	\$15.66
8	Painters, Construction and Maintenance	212	3,234	\$14.44
9	Maintenance and Repair Workers, General	200	5,406	\$16.32
10	Roofers	172	2,062	\$15.22
11	Sales Representatives, Wholesale and Manufacturing, Except Technical and Scientific Products	166	4,395	\$20.79
12	Licensed Practical and Licensed Vocational Nurses	166	2,900	\$20.89
13	Automotive Service Technicians and Mechanics	149	3,293	\$19.12
14	Childcare Workers	146	2,641	\$10.31
15	Security Guards	142	4,145	\$11.19
16	Medical Assistants	136	2,528	\$15.18
17	Electricians	133	2,432	\$17.86
18	Real Estate Sales Agents	131	3,870	\$17.98
19	Heating, Air Conditioning, and Refrigeration Mechanics and Installers	131	2,120	\$18.15
20	Cement Masons and Concrete Finishers	119	1,246	\$14.50

Source: Occupational Supply/Demand Report, Florida Department of Economic Opportunity

Some College

The forecast top 10 occupations for growth from 2015 to 2023 requiring a minimum of “some college” are registered nurses, first-line supervisors of construction trades, first-line supervisors of administrative support workers, construction managers, bookkeeping, accounting, and auditing clerks, operations managers, farmers, ranchers and other agricultural managers, property, real estate, and community association managers, business operations specialists, and cost estimators. The top 20 average annual growth occupations for “some college”, along with the median wage and current employment, can be found in table 19.

Table 19: Some College Long-term Growth Occupations
2015 to 2023

#	Occupation	Average Annual Growth	Current Employment	Median Wage
1	Registered Nurses	426	9,364	\$29.49
2	First-Line Supervisors of Construction Trades and Extraction Workers	218	3,486	\$26.08
3	First-Line Supervisors of Office and Administrative Support Workers	191	4,285	\$22.32
4	Construction Managers	184	3,661	\$34.86
5	Bookkeeping, Accounting, and Auditing Clerks	169	5,279	\$16.47
6	General and Operations Managers	162	3,755	\$45.91
7	Farmers, Ranchers, and Other Agricultural Managers	118	7,358	\$32.30
8	Property, Real Estate, and Community Association Managers	118	2,797	\$26.85
9	Business Operations Specialists, All Other	107	2,703	\$28.41
10	Cost Estimators	92	1,031	\$25.17
11	Preschool Teachers, Except Special Education	50	943	\$11.04
12	Recreation Workers	49	1,408	\$11.98
13	Managers, All Other	49	1,184	\$36.00
14	Human Resources Specialists	38	983	\$24.15
15	Dental Hygienists	37	693	\$33.26
16	Food Service Managers	36	1,123	\$28.52
17	Veterinary Technologists and Technicians	34	693	\$15.68
18	Graphic Designers	31	713	\$19.45
19	Emergency Medical Technicians and Paramedics	31	665	\$17.81
20	Software Developers, Applications	28	718	\$32.70

Source: Occupational Supply/Demand Report, Florida Department of Economic Opportunity

Bachelor's Degree

The forecast top 10 occupations for growth from 2015 to 2023 requiring a Bachelor's Degree include elementary school teachers, accountants and auditors, secondary school teachers, middle school teachers, management analysts, kindergarten teachers, civil engineers, market research analysts, teachers and instructors, and medical and health service managers. The top 20 average annual growth occupations for Bachelor's Degree, along with the median wage and current employment, can be found in table 20.

Table 20: Bachelor's Degree Long-term Growth Occupations
2015 to 2023

#	Occupation	Average Annual Growth	Current Employment	Median Wage
1	Elementary School Teachers, Except Special Education	208	3,960	\$29.54
2	Accountants and Auditors	189	3,668	\$29.03
3	Secondary School Teachers, Except Special and Career/Technical Education	112	2,240	\$30.86
4	Middle School Teachers, Except Special and Career/Technical Education	104	1,973	\$29.73
5	Management Analysts	90	1,710	\$34.04
6	Kindergarten Teachers, Except Special Education	44	737	\$28.79
7	Civil Engineers	43	685	\$39.06
8	Market Research Analysts and Marketing Specialists	38	595	\$25.14
9	Teachers and Instructors, All Other	38	952	N/R
10	Medical and Health Services Managers	37	665	\$47.99
11	Personal Financial Advisors	33	895	\$39.36
12	Special Education Teachers, All Other	33	857	\$32.82
13	Chief Executives	33	772	\$88.78
14	Financial Managers	31	796	\$50.41
15	Clergy	28	856	\$21.52
16	Physician Assistants	26	386	\$48.77
17	Sales Managers	25	545	\$61.68
18	Environmental Scientists and Specialists, Including Health	23	536	\$23.58
19	Training and Development Specialists	23	519	\$26.03
20	Career/Technical Education Teachers, Secondary School	21	430	\$34.20

Source: Occupational Supply/Demand Report, Florida Department of Economic Opportunity

Master's Degree or Higher

The forecast top 10 occupations for growth from 2015 to 2023 requiring a Master's Degree or higher include lawyers, family and general practitioners, physical therapists, pharmacists, dentists, nurse practitioners, health care social workers, architects, child, family, and school social workers, and health specialties teachers. The top 20 average annual growth occupations for Master's Degree or higher, along with the median wage and current employment, can be found in table 21.

Table 21: Master's Degree or Higher Long-term Growth Occupations
2015 to 2023

#	Occupation	Average Annual Growth	Current Employment	Median Wage
1	Lawyers	65	1,809	\$39.83
2	Family and General Practitioners	47	1,006	\$94.59
3	Physical Therapists	47	838	\$40.68
4	Pharmacists	42	962	\$59.12
5	Dentists, General	28	672	\$61.03
6	Nurse Practitioners	26	402	\$48.99
7	Healthcare Social Workers	24	431	\$23.25
8	Architects, Except Landscape and Naval	23	384	\$32.01
9	Child, Family, and School Social Workers	22	511	\$18.29
10	Health Specialties Teachers, Postsecondary	19	264	\$28.90
11	Educational, Guidance, School, and Vocational Counselors	18	392	\$31.60
12	Veterinarians	18	332	\$46.86
13	Instructional Coordinators	17	480	\$23.17
14	Speech-Language Pathologists	16	401	\$37.41
15	Occupational Therapists	15	338	\$42.38
16	Nurse Anesthetists	15	255	\$70.89
17	Librarians	13	267	\$28.71
18	Clinical, Counseling, and School Psychologists	11	202	\$41.27
19	Mental Health and Substance Abuse Social Workers	9	203	\$15.47
20	Operations Research Analysts	9	160	\$27.52

Source: Occupational Supply/Demand Report, Florida Department of Economic Opportunity

INDUSTRY DIVERSIFICATION INDEX

The FGCU Industry Diversification Index (IDI) is a measure of market concentration within a region. The IDI is computed quarterly by the Regional Economic Research Institute's Industry Diversification project, which tracks industry diversification by MSA, workforce region, and state.

The team computed the IDI for Southwest Florida's workforce in an effort to track, over time, its degree of workforce diversity based on the assumption that a more diverse labor market (in which most jobs are spread out among many industries) would have a higher IDI, and a less diverse one (in which most jobs are concentrated in a few industries) would have a lower IDI.

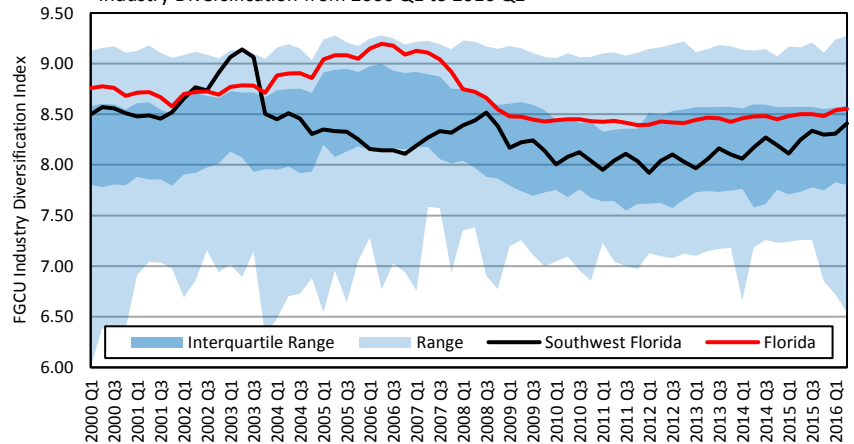
Industry diversification is an important factor explaining our state and region's tendency to overheat during expansions in the business cycle and overcorrect during contractions in the business cycle.

As shown in Chart 16, Southwest Florida's workforce became less diversified in the years leading up to the 2008 recession. The decline in concentration from second quarter of 2003 to the first quarter of 2007 is recorded by the IDI decreasing from 9.14 to 8.19, a decrease of 10 percent. However, the increase in concentration that followed can be explained (partly) by the contraction of the construction industry (beginning prior to the recession), as well as by reductions in the labor force by other industries that contributed to workforce concentration during the boom. Since the recession, we see now that the region has a seasonal trend, with the peak quarters occurring between April and September (off-season) and the low points occurring between October and March (season). The lower measures are explained by the influx of tourism and seasonal residents during the winter season, increasing demand for retail trade and accommodation and food service jobs. This increase makes Southwest Florida more concentrated in these industries, therefore dropping the IDI.

The index also reflects structural changes to Southwest Florida's economy that have occurred since 2008. According to data released by the U.S. Census Bureau in December 2016, the state of Florida lost 340,000 manufacturing jobs and almost 150,000 construction jobs during the recession. Although these industries have started to recover, they are the types of industries that promote a balanced labor force and many workers who lost those jobs ended leaving the state, finding employment in other sectors, or leaving the labor force entirely. The effects of these statewide trends are reflected in a marked decrease in diversification in our region. From 2000 to 2004, Southwest Florida's average annual level of diversification was 8.6318. From 2010 to 2015, this average fell to 8.1027, or about 6 percent. In contrast, the state overall saw a decrease in

Chart 16: Southwest Florida

Industry Diversification from 2000 Q1 to 2016 Q2



Source: FGCU Industry Diversification Index calculated by the RERI, using data obtained from the Quarterly Census of Employment and Wages.

Table 22: Average Annual Industry Diversification Index
2000 to 2015

Year	Southwest Florida	Florida
2000	8.534	8.744
2001	8.486	8.668
2002	8.767	8.709
2003	8.942	8.762
2004	8.430	8.887
2005	8.316	9.064
2006	8.138	9.153
2007	8.278	9.049
2008	8.432	8.670
2009	8.193	8.457
2010	8.062	8.443
2011	8.035	8.416
2012	8.024	8.414
2013	8.071	8.449
2014	8.175	8.468
2015	8.249	8.492

Source: FGCU Industry Diversification Index calculated by the RERI, using data obtained from the Quarterly Census of Employment and Wages.

diversification by 3.5 percent for the same time periods. IDI measures for the region, state, and country are presented in Table 22 below. For more information on industry diversity, see the web site of the Industry Diversification Project, at lutgert.fgcu.edu/IDP.

SUMMARY AND CONCLUSIONS

Education and training and other activities that improve human capital tend to lead to greater productivity and higher wages. Eighteen percent of the top 50 employment gaps identified an education requirement less than high school with a weighted average median wage in Southwest Florida of \$10.43 per hour. Adult vocational training covers a wide range of occupations and represented 38 percent of the top 50 employment gaps identified. The median wage for occupations requiring adult vocational training was higher at \$17.65. Some college or higher including an associate degree was required by 12 percent of the top 50 employment gaps with a median wage of \$26.55. The weighted average median wage reported below is based on all regional occupations reporting an employment gap. Since wages, serving as the price for labor, attract workers to different types of employment, we would expect those showing higher wage increases today to attract workers over time and thus place a downward pressure on employment gaps in the future.

Table 23: Occupations With Employment Gaps
2015 to 2016

Minimum Education	Percent of Top 50 Employment Gaps			Weighted Average Median Wage		
	2015	2016	Change	2015	2016	Change
Less HS/GED	12%	18%	6%	\$10.15	\$10.43	2.76%
HS/GED	10%	10%	0%	\$13.57	\$13.35	-1.66%
PS Adult Voc	42%	38%	-4%	\$17.33	\$17.65	1.82%
Some College	18%	12%	-6%	\$26.45	\$26.55	0.36%
Bachelor's	10%	14%	4%	\$31.42	\$32.42	3.18%
Master's or Higher	8%	8%	0%	\$49.61	\$48.30	-2.63%

This study has provided an overview of Southwest Florida's labor market including the mix of industries, current employment gaps and forecast growth occupations. The quality, depth, and diversity of a region's workforce are critical components in fostering economic growth and development. The importance of this information in understanding what opportunities exist for students, parents, businesses, and educators will help foster discussion, better decisions, and more collaboration. Technology and globalization are driving change in our lives and employment opportunities. The Workforce Now research is designed to provide a continuous flow of research focused on Southwest Florida's labor market.

APPENDIX: TOP 50 OCCUPATIONAL EMPLOYMENT GAPS

Below is a list of the top 50 occupational employment gaps identified in summer 2016.

Table 24: Top 25 Employment Gaps
Summer 2016

#	Occupation	Current Supply Gap	Current Employment	Median Wage	Minimum Education
1	First-Line Supervisors of Retail Sales Workers	-317	8,604	\$19.34	PS Adult Voc
2	First-Line Supervisors of Food Preparation and Serving Workers	-288	4,029	\$15.66	PS Adult Voc
3	Retail Salespersons	-262	24,434	\$11.11	HS/GED
4	Maintenance and Repair Workers, General	-154	5,406	\$16.32	PS Adult Voc
5	First-Line Supervisors of Construction Trades and Extraction Workers	-150	3,486	\$26.08	Some College
6	Landscaping and Groundskeeping Workers	-140	11,858	\$11.10	Less HS/GED
7	Securities, Commodities, and Financial Services Sales Agents	-123	724	\$34.64	Bachelor's
8	Registered Nurses	-114	9,364	\$29.49	Some College
9	First-Line Supervisors of Office and Administrative Support Workers	-108	4,285	\$22.32	Some College
10	Physical Therapists	-107	838	\$40.68	Master's or Higher
11	Demonstrators and Product Promoters	-105	255	\$10.63	HS/GED
12	Speech-Language Pathologists	-97	401	\$37.41	Master's or Higher
13	Sales Representatives, Wholesale and Manufacturing, Except Technical and Scientific Products	-89	4,395	\$20.79	PS Adult Voc
14	Combined Food Preparation and Serving Workers, Including Fast Food	-82	11,736	\$9.17	Less HS/GED
15	Maids and Housekeeping Cleaners	-77	5,494	\$10.22	Less HS/GED
16	Tellers	-66	2,116	\$13.54	PS Adult Voc
17	Carpenters	-64	6,188	\$17.68	PS Adult Voc
18	Medical and Health Services Managers	-59	665	\$47.99	Bachelor's
19	Electricians	-55	2,432	\$17.86	PS Adult Voc
20	Janitors and Cleaners, Except Maids and Housekeeping Cleaners	-55	5,449	\$11.34	Less HS/GED
21	Loan Officers	-55	632	\$37.94	Some College
22	First-Line Supervisors of Non-Retail Sales Workers	-47	1,075	\$30.48	Some College
23	Occupational Therapists	-47	338	\$42.38	Master's or Higher
24	Insurance Sales Agents	-46	1,752	\$22.21	PS Adult Voc
25	Computer Systems Analysts	-45	501	\$36.35	Some College

Source: Occupational Supply/Demand Report, Florida Department of Economic Opportunity

Table 25: Ranked 26-50 Employment Gaps
Summer 2016

#	Occupation	Current Supply Gap	Current Employment	Median Wage	Minimum Education
26	Taxi Drivers and Chauffeurs	-45	1,048	\$9.98	Less HS/GED
27	Cleaners of Vehicles and Equipment	-44	1,493	\$9.64	Less HS/GED
28	Real Estate Sales Agents	-43	3,870	\$17.98	PS Adult Voc
29	Telecommunications Equipment Installers and Repair	-43	840	\$26.36	PS Adult Voc
30	Merchandise Displayers and Window Trimmers	-40	385	\$12.08	HS/GED
31	Sheet Metal Workers	-38	679	\$15.17	PS Adult Voc
32	Dishwashers	-37	2,564	\$9.28	Less HS/GED
33	Financial Managers	-37	796	\$50.41	Bachelor's
34	Bus and Truck Mechanics and Diesel Engine Specialists	-36	498	\$19.66	PS Adult Voc
35	Automotive Service Technicians and Mechanics	-35	3,293	\$19.12	PS Adult Voc
36	First-Line Supervisors of Transportation and Material-Moving Machine and Vehicle Operators	-35	395	\$24.74	PS Adult Voc
37	Coaches and Scouts	-34	402	\$23.60	HS/GED
38	Family and General Practitioners	-34	1,006	\$94.59	Master's or Higher
39	Heating, Air Conditioning, and Refrigeration Mechanics and Installers	-34	2,120	\$18.15	PS Adult Voc
40	Sales Representatives, Services, All Other	-33	4,473	\$25.08	HS/GED
41	Plumbers, Pipefitters, and Steamfitters	-32	1,848	\$18.89	PS Adult Voc
42	Drywall and Ceiling Tile Installers	-29	535	\$14.27	PS Adult Voc
43	Physician Assistants	-29	386	\$48.77	Bachelor's
44	Personal Financial Advisors	-28	895	\$39.36	Bachelor's
45	Personal Care Aides	-27	1,043	\$10.42	PS Adult Voc
46	Sales Representatives, Wholesale and Manufacturing, Technical and Scientific Products	-26	549	\$32.57	PS Adult Voc
47	Tree Trimmers and Pruners	-26	N/R	\$13.67	Less HS/GED
48	Amusement and Recreation Attendants	-23	1,728	\$9.38	Less HS/GED
49	Industrial Engineers	-23	241	\$33.31	Bachelor's
50	Public Relations Specialists	-23	398	\$23.46	Bachelor's

Source: Occupational Supply/Demand Report, Florida Department of Economic Opportunity

APPENDIX: TOP 50 LONG-TERM AVERAGE ANNUAL EMPLOYMENT GROWTH BY OCCUPATION

Below is a list of the top 50 occupational employment gaps identified in summer 2016.

**Table 26: Top 25 Long-Term Employment Growth Occupations
2015 to 2023**

#	Occupation	Average Annual Growth	Current Employment	Median Wage	Minimum Education
1	Retail Salespersons	1,369	24,434	\$11.11	HS/GED
2	Waiters and Waitresses	1,047	15,853	\$9.21	Less HS/GED
3	Combined Food Preparation and Serving Workers, Including Fast Food	775	11,736	\$9.17	Less HS/GED
4	Cashiers	692	13,071	\$9.42	HS/GED
5	Landscaping and Groundskeeping Workers	592	11,858	\$11.10	Less HS/GED
6	Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	460	11,579	\$14.75	PS Adult Voc
7	Registered Nurses	426	9,364	\$29.49	Some College
8	Carpenters	369	6,188	\$17.68	PS Adult Voc
9	Customer Service Representatives	365	7,443	\$14.67	PS Adult Voc
10	Construction Laborers	362	5,593	\$13.18	Less HS/GED
11	Office Clerks, General	343	8,666	\$12.43	HS/GED
12	Laborers and Freight, Stock, and Material Movers, Hand	334	6,067	\$10.58	Less HS/GED
13	Cooks, Restaurant	309	6,750	\$11.37	PS Adult Voc
14	Nursing Assistants	308	5,865	\$12.61	PS Adult Voc
15	First-Line Supervisors of Retail Sales Workers	301	8,604	\$19.34	PS Adult Voc
16	Sales Representatives, Services, All Other	271	4,473	\$25.08	HS/GED
17	Receptionists and Information Clerks	256	4,978	\$13.12	HS/GED
18	Stock Clerks and Order Fillers	251	7,147	\$11.39	HS/GED
19	Maids and Housekeeping Cleaners	236	5,494	\$10.22	Less HS/GED
20	Janitors and Cleaners, Except Maids and Housekeeping Cleaners	230	5,449	\$11.34	Less HS/GED
21	Hosts and Hostesses, Restaurant, Lounge, and Coffee Shop	219	2,187	\$10.09	Less HS/GED
22	First-Line Supervisors of Construction Trades and Extraction Workers	218	3,486	\$26.08	Some College
23	First-Line Supervisors of Food Preparation and Serving Workers	214	4,029	\$15.66	PS Adult Voc
24	Farmworkers and Laborers, Crop, Nursery, and Greenhouse	212	6,929	\$9.38	Less HS/GED
25	Painters, Construction and Maintenance	212	3,234	\$14.44	PS Adult Voc

Source: Occupational Supply/Demand Report, Florida Department of Economic Opportunity

**Table 27: Ranked 26-50 Long-Term Employment Growth Occupations
2015 to 2023**

#	Occupation	Average Annual Growth	Current Employment	Median Wage	Minimum Education
26	Elementary School Teachers, Except Special Education	208	3,960	\$29.54	Bachelor's
27	Maintenance and Repair Workers, General	200	5,406	\$16.32	PS Adult Voc
28	First-Line Supervisors of Office and Administrative Support Workers	191	4,285	\$22.32	Some College
29	Accountants and Auditors	189	3,668	\$29.03	Bachelor's
30	Construction Managers	184	3,661	\$34.86	Some College
31	Food Preparation Workers	177	4,022	\$10.11	Less HS/GED
32	Dining Room and Cafeteria Attendants and Bartender	172	2,649	\$9.44	Less HS/GED
33	Roofers	172	2,062	\$15.22	PS Adult Voc
34	Bookkeeping, Accounting, and Auditing Clerks	169	5,279	\$16.47	Some College
35	Dishwashers	166	2,564	\$9.28	Less HS/GED
36	Sales Representatives, Wholesale and Manufacturing, Except Technical and Scientific Products	166	4,395	\$20.79	PS Adult Voc
37	Licensed Practical and Licensed Vocational Nurses	166	2,900	\$20.89	PS Adult Voc
38	Bartenders	163	2,813	\$9.24	Less HS/GED
39	General and Operations Managers	162	3,755	\$45.91	Some College
40	Automotive Service Technicians and Mechanics	149	3,293	\$19.12	PS Adult Voc
41	Childcare Workers	146	2,641	\$10.31	PS Adult Voc
42	Security Guards	142	4,145	\$11.19	PS Adult Voc
43	Medical Assistants	136	2,528	\$15.18	PS Adult Voc
44	Counter Attendants, Cafeteria, Food Concession, and Coffee Shop	134	1,681	\$9.04	Less HS/GED
45	Electricians	133	2,432	\$17.86	PS Adult Voc
46	Real Estate Sales Agents	131	3,870	\$17.98	PS Adult Voc
47	Heating, Air Conditioning, and Refrigeration Mechanics and Installers	131	2,120	\$18.15	PS Adult Voc
48	Amusement and Recreation Attendants	123	1,728	\$9.38	Less HS/GED
49	Cement Masons and Concrete Finishers	119	1,246	\$14.50	PS Adult Voc
50	Farmers, Ranchers, and Other Agricultural Managers	118	7,358	\$32.30	Some College

Source: Occupational Supply/Demand Report, Florida Department of Economic Opportunity