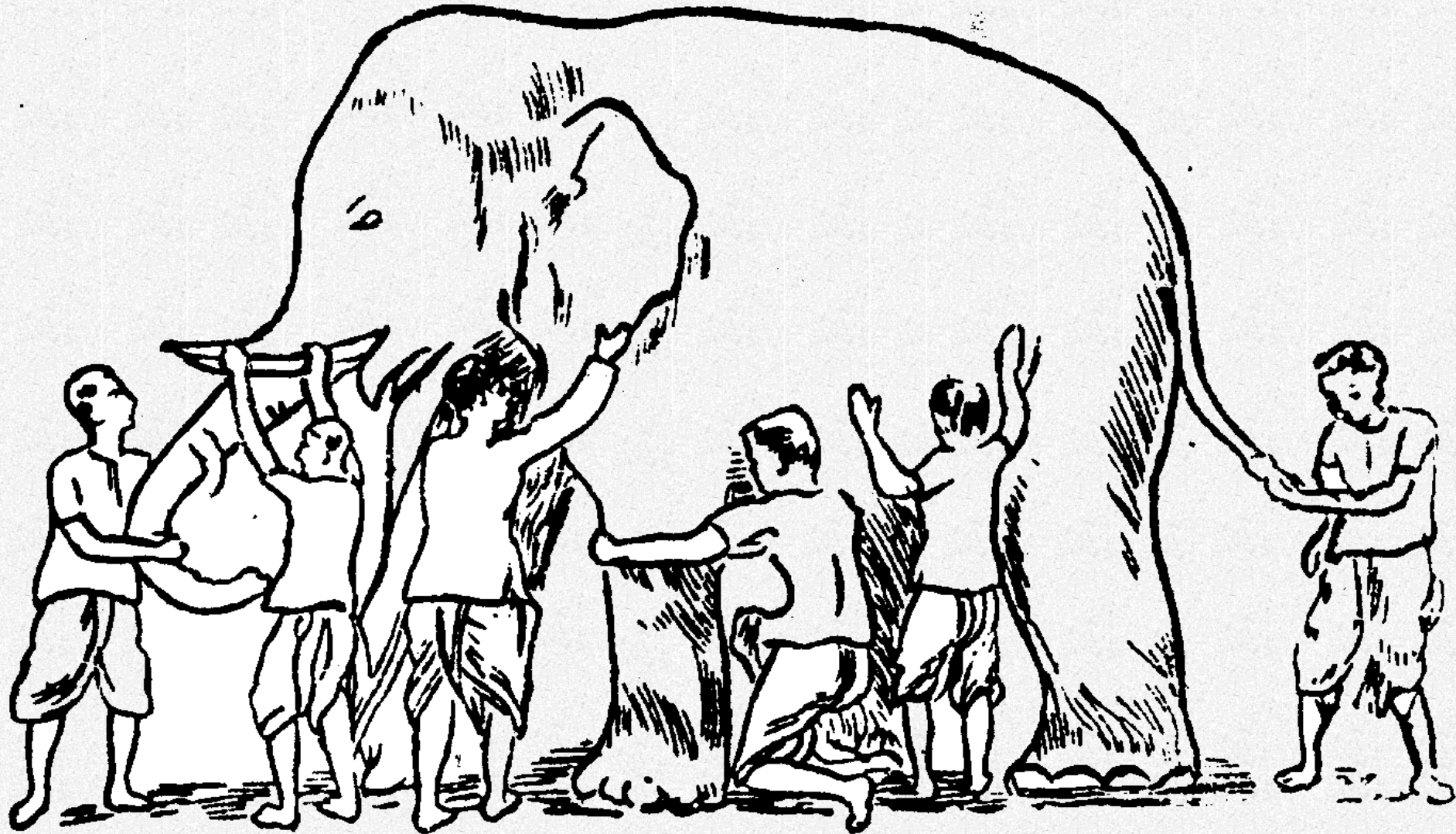


Integrating LED Data into Regional Labor Market Storytelling

**Labor Market & Career Information (LMCI)
Texas Workforce Commission**

**richard.froeschle@twc.state.tx.us
(512) 936-3105**

Understanding a Regional Economy: In Search of **Convergent Validity**

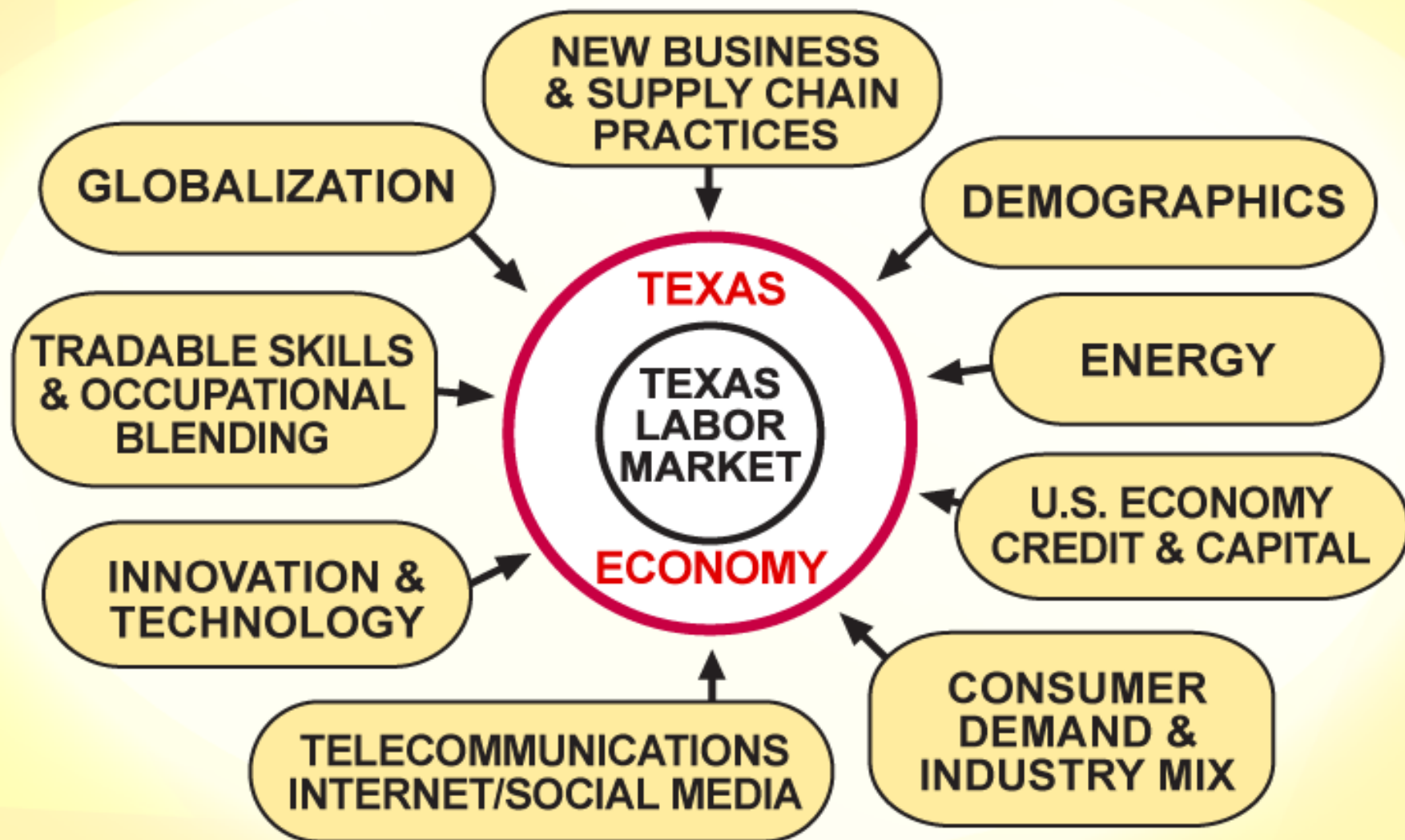


The Storyline:

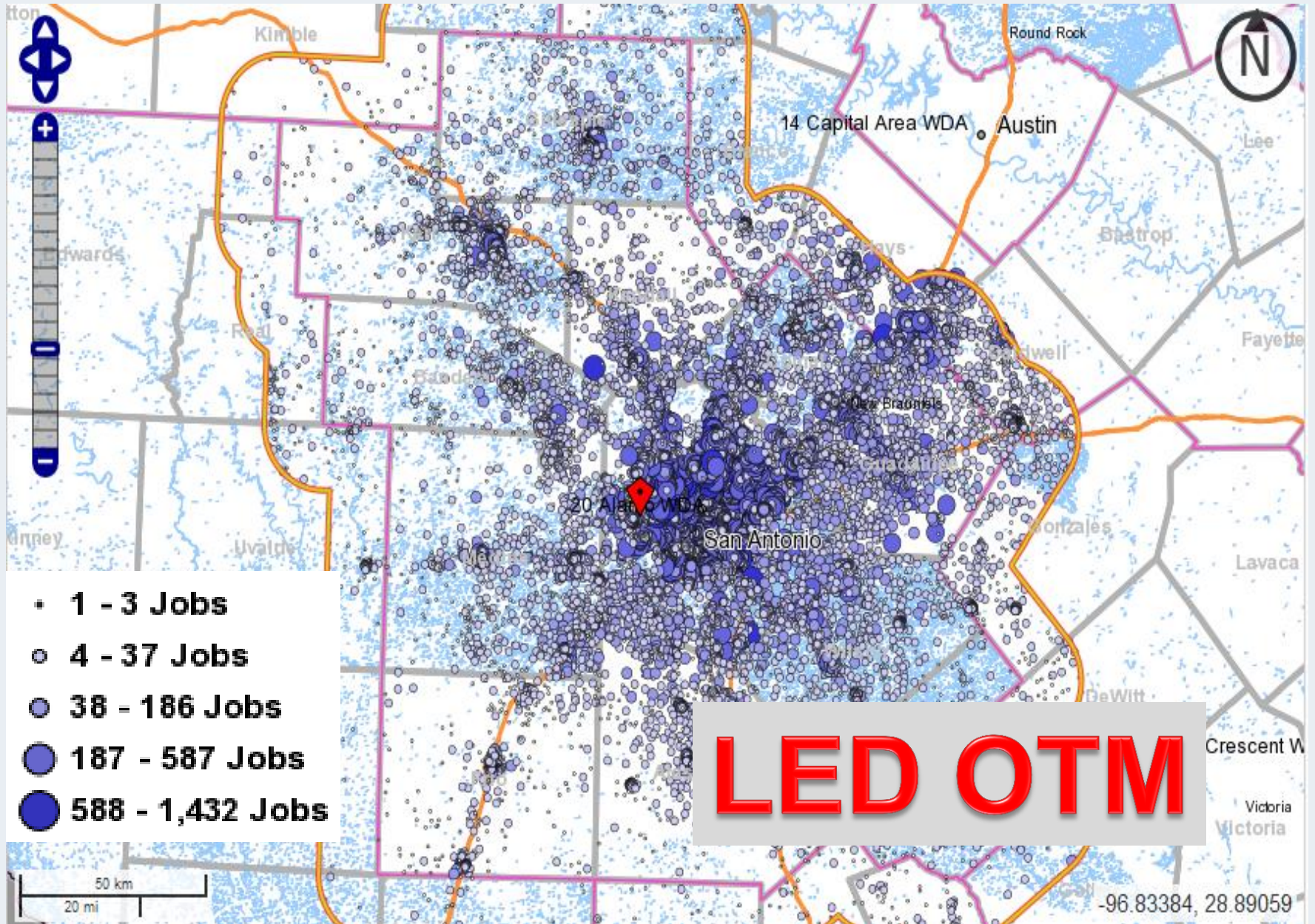
The Alamo workforce board in San Antonio Texas wants to better understand their regional economy to provide guidance and support to the local community college system to provide market-responsive training programs

The Changing Face of the Texas Labor Market

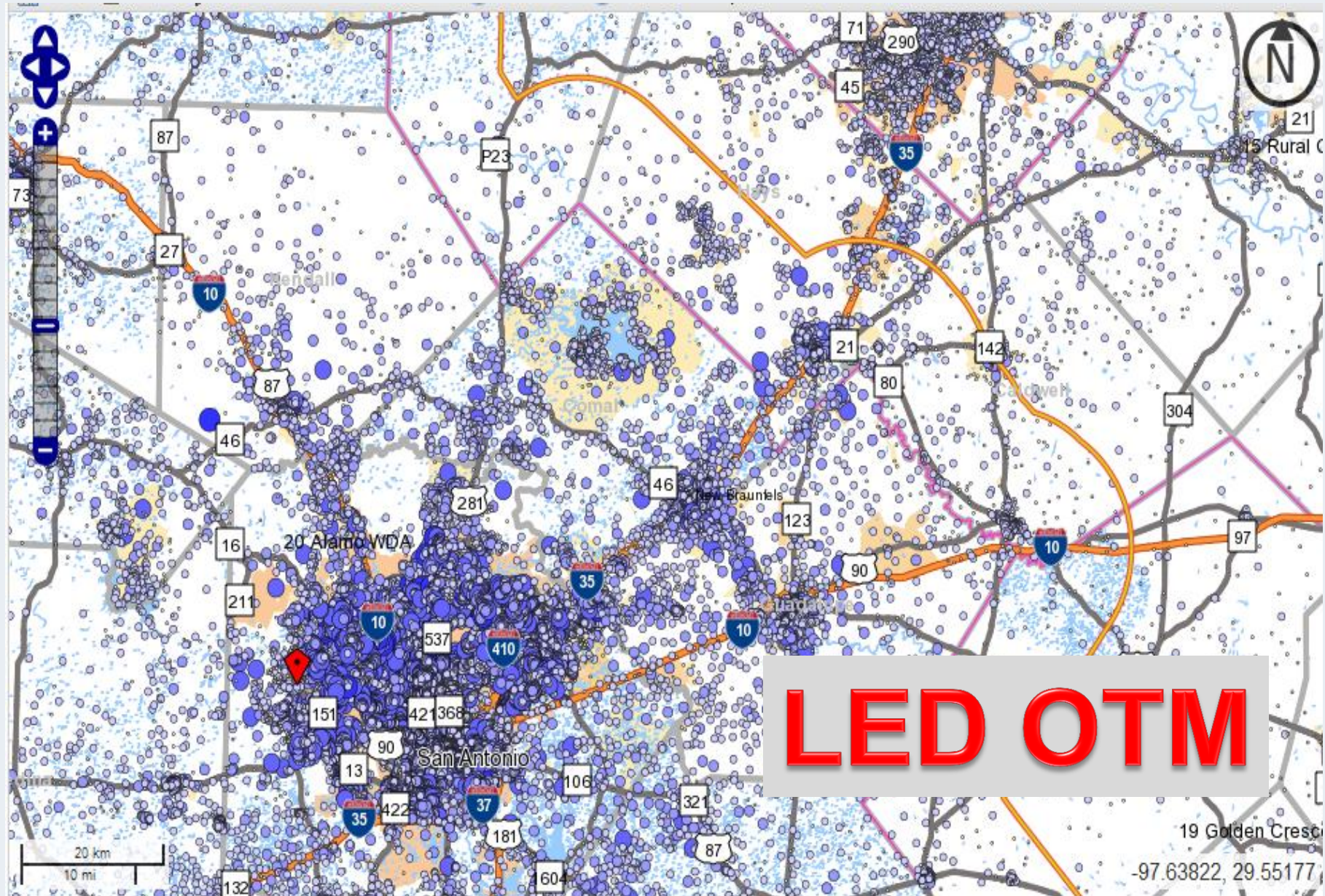
STRUCTURAL TRANSFORMATIONS



Worker Concentrations in Alamo LWDA



Alamo Commuting Patterns



Alamo Commuters: The Austin Connection

Jobs by Distance - Work Census Block to Home Census Block

2009

	Count	Share
Total All Jobs	875,923	100.0%
Less than 10 miles	430,224	49.1%
10 to 24 miles	232,677	26.6%
25 to 50 miles	64,344	7.3%
Greater than 50 miles	148,678	17.0%

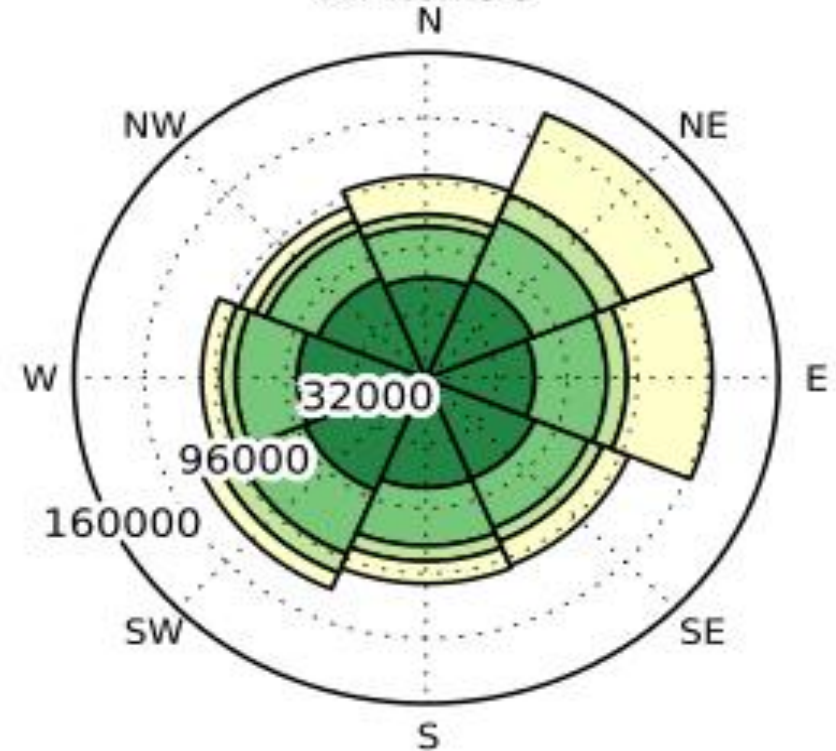
Jobs Counts by Places (Cities, CDPs, etc.) Where Workers Live - All Jobs

2009

	Count	Share
All Places (Cities, CDPs, etc.)	875,923	100.0%
San Antonio city, TX	453,744	51.8%
Austin city, TX	16,569	1.9%
New Braunfels city, TX	16,260	1.9%
Houston city, TX	13,421	1.5%
Schertz city, TX	10,270	1.2%
San Marcos city, TX	9,300	1.1%
Sequin city, TX	9,238	1.1%
Kerrville city, TX	8,279	0.9%
Universal City city, TX	5,813	0.7%
Canyon Lake CDP, TX	5,491	0.6%
All Other Locations	327,538	37.4%

Job Counts by Distance/Direction in 2009

All Workers



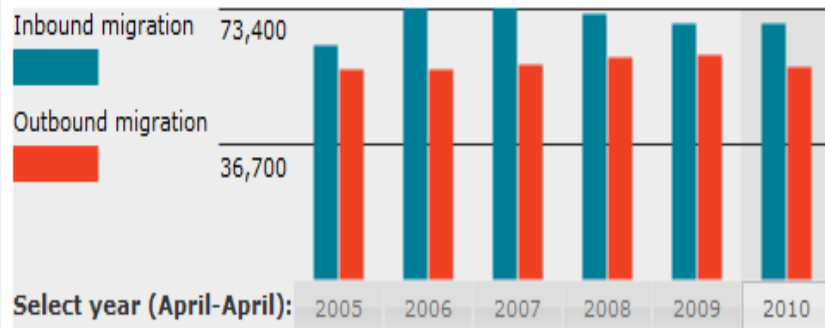
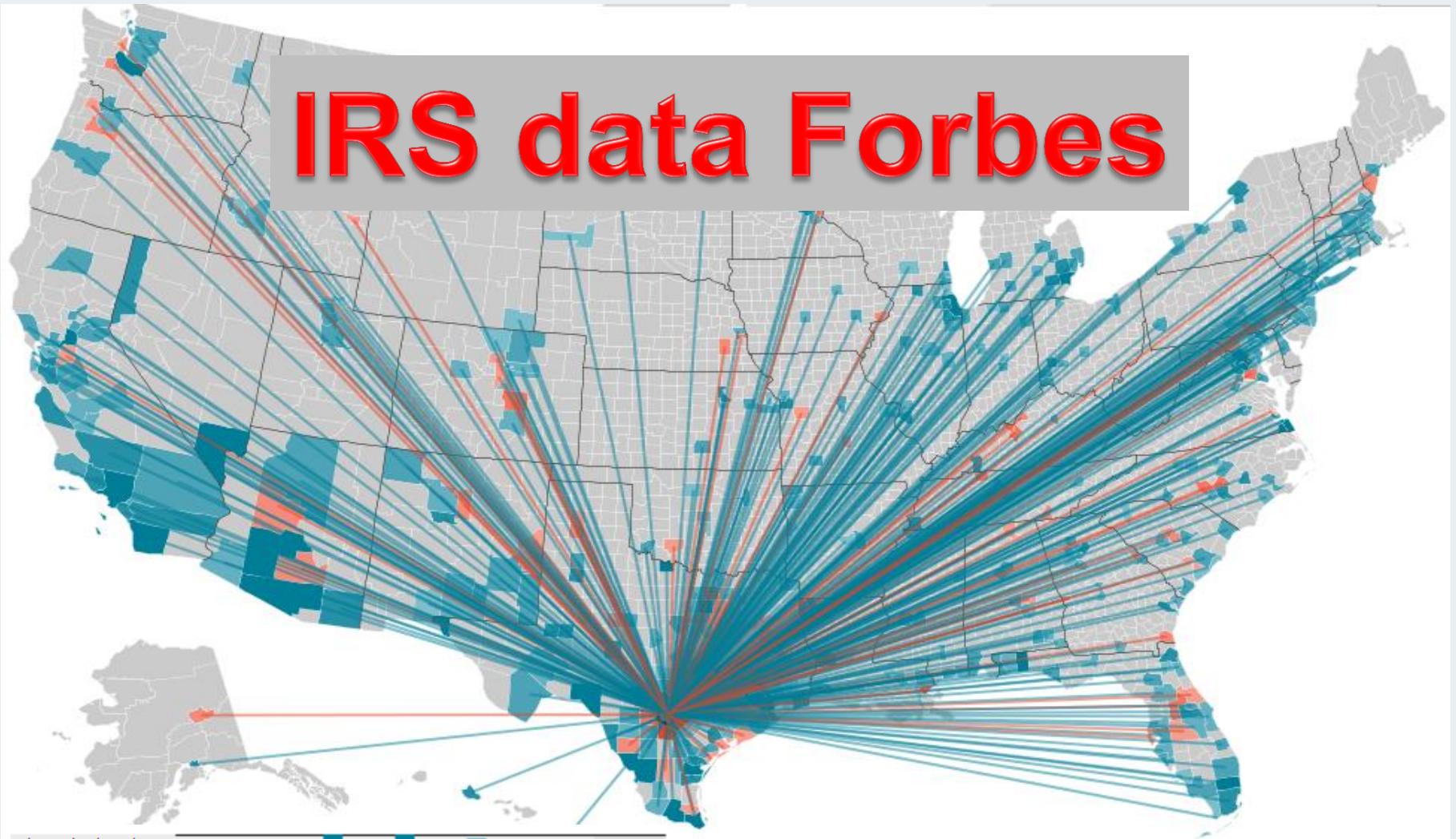
Comparative Total Population Change in Texas 2000-2010

	2000 Population	2010 Population	ABS CHG 2000-10	PCT CHG 2000-10
United States	281,421,906	308,745,538	27,323,632	9.7%
Texas	20,851,820	25,145,561	4,293,741	20.6%
California	33,871,648	37,253,956	3,382,308	10.0%
Florida	15,000,272	18,801,310	2,818,932	17.6%
Georgia	8,553,553	10,553,553	1,501,200	18.3%
North Carolina	8,553,553	10,553,553	1,486,170	18.5%
Arizona	5,130,632	6,392,017	1,261,385	24.6%

Census

Decennial census counts for April 1, 2000 and April 1, 2010

IRS data Forbes



**Migrations Patterns for
Bexar County, Texas**

Texas & U.S. Labor Market Statistics

	Dec 2011	Nov 2011	Dec 2010
Texas Labor Force +169,500 YOY	12,378,800	12,361,500	12,209,300
Texas Unemployed	850,400	807,100	1,010,700
Texas U Rate			8.3%
U.S. Labor Force +274,000 YOY	153,887,000	153,937,000	153,613,000
U.S. Unemployed	13,097,000	13,323,000	14,393,000
U.S. Urate	8.5%	8.7%	9.4%
San Antonio Urate**	6.8%	7.0%	7.2%

BLS LAUS data

U.S. and Texas Civilian Labor Force

(1,000s)

156,000

154,000

152,000

150,000

148,000

146,000

144,000

142,000

140,000

138,000

136,000

— US CLF (sa)

— Texas CLF (sa)

13,000,000

12,500,000

12,000,000

11,500,000

11,000,000

10,500,000

10,000,000

9,500,000

recession

CPS and LAUS

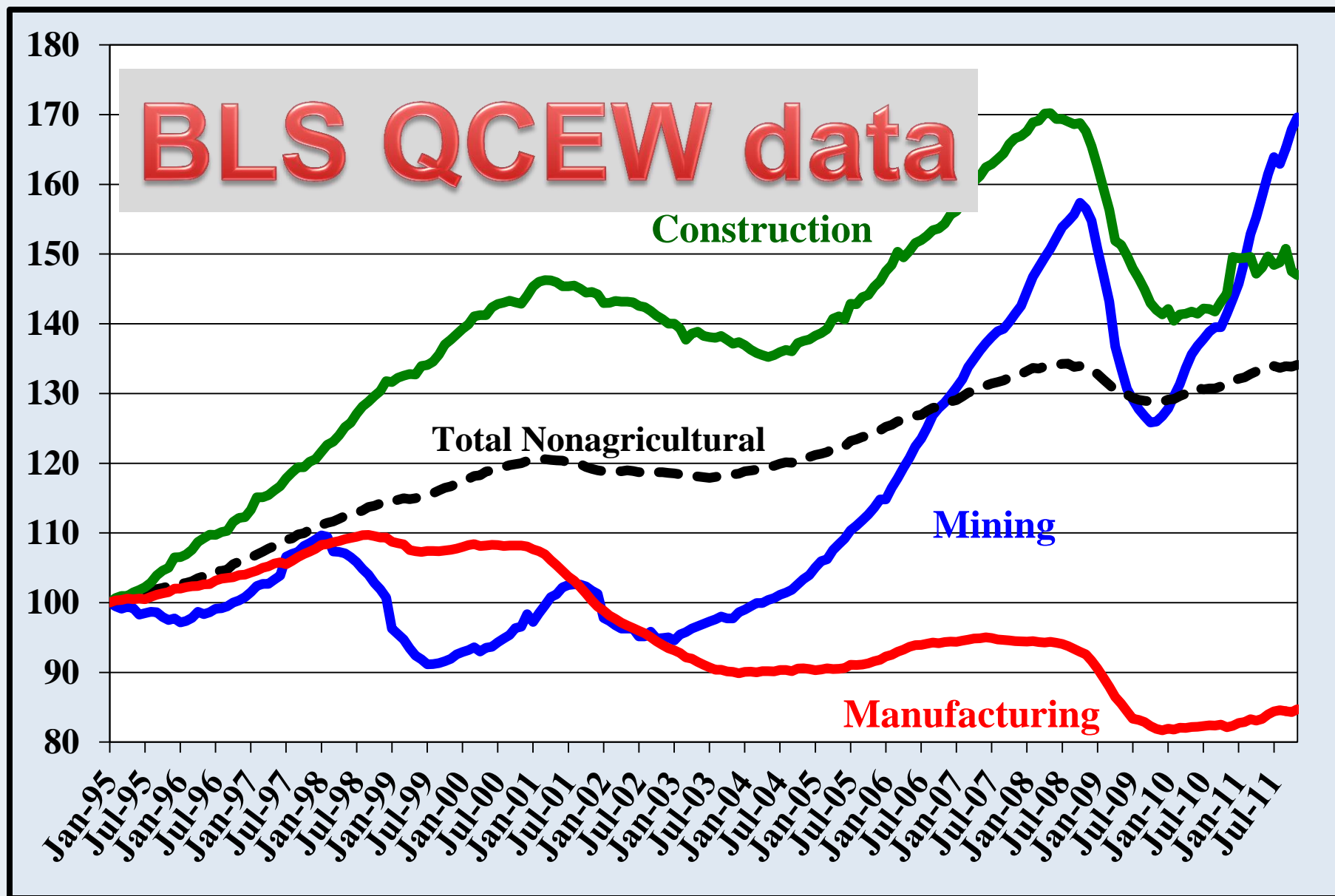
Jan-01
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Sep-11

San Antonio MSA Industry Growth 2010-11 YOY

Industry	Dec-11	ABS CHG	PER CHG
Total Nonagricultural	850,300	2,900	0.3%
Total Nongovernment (aka private)	691,300	8,000	1.2%
Goods-Producing	91,800	2,000	2.2%
Service-Providing	758,500	900	0.1%
Professional and Business Services	97,500	-4,400	-4.3%
Trade, Transportation, and Utilities	20,400	200	1.0%
Leisure and Hospitality	101,300	900	0.9%
Mining, Logging, Construction	45,500	500	1.1%
Education and Health Services	100,000	7,000	5.3%
Manufacturing	100,000	1,500	3.3%
Financial Activities	100,000	-2,100	-3.2%
Other Services	32,000	500	1.6%
Information	17,100	-800	-4.5%
Government	159,000	-5,100	-3.1%

BLS CES data

Goods Producing Employment Trends (1995-2011)



GAINERS: Alamo WDA Sectors (2009-11)	EMP 2011Q2	ABS CHG	PCT CHG	Trend vs 2018
Tourism, Hospitality and Leisure: restaurants and hotels	119,475	6,003	5.3	Above
Business and Financial Services: Insurance, non-bank financial	139,052	4,656	3.5	Above
Biotechnology, Life Sciences & Medical: Hospitals, Physicians Offices	73,725	4,426	6.4	Above
Corporate HQ, Administrative & Government: federal govt.	88,927	3,682	4.3	Above
Personal and nursing care	BLS QCEW data			
Transportation				
manufacturing, auto repair	31,910	2,817	9.7	Above
Legal, Protective & Human Support Services: individual family services, legal and emergency services	28,136	1,735	6.6	Above
Electronics & Applied Computer Equipment: semi-conductors, commercial electronic & medical equipment wholesalers	11,949	1,069	9.8	Above

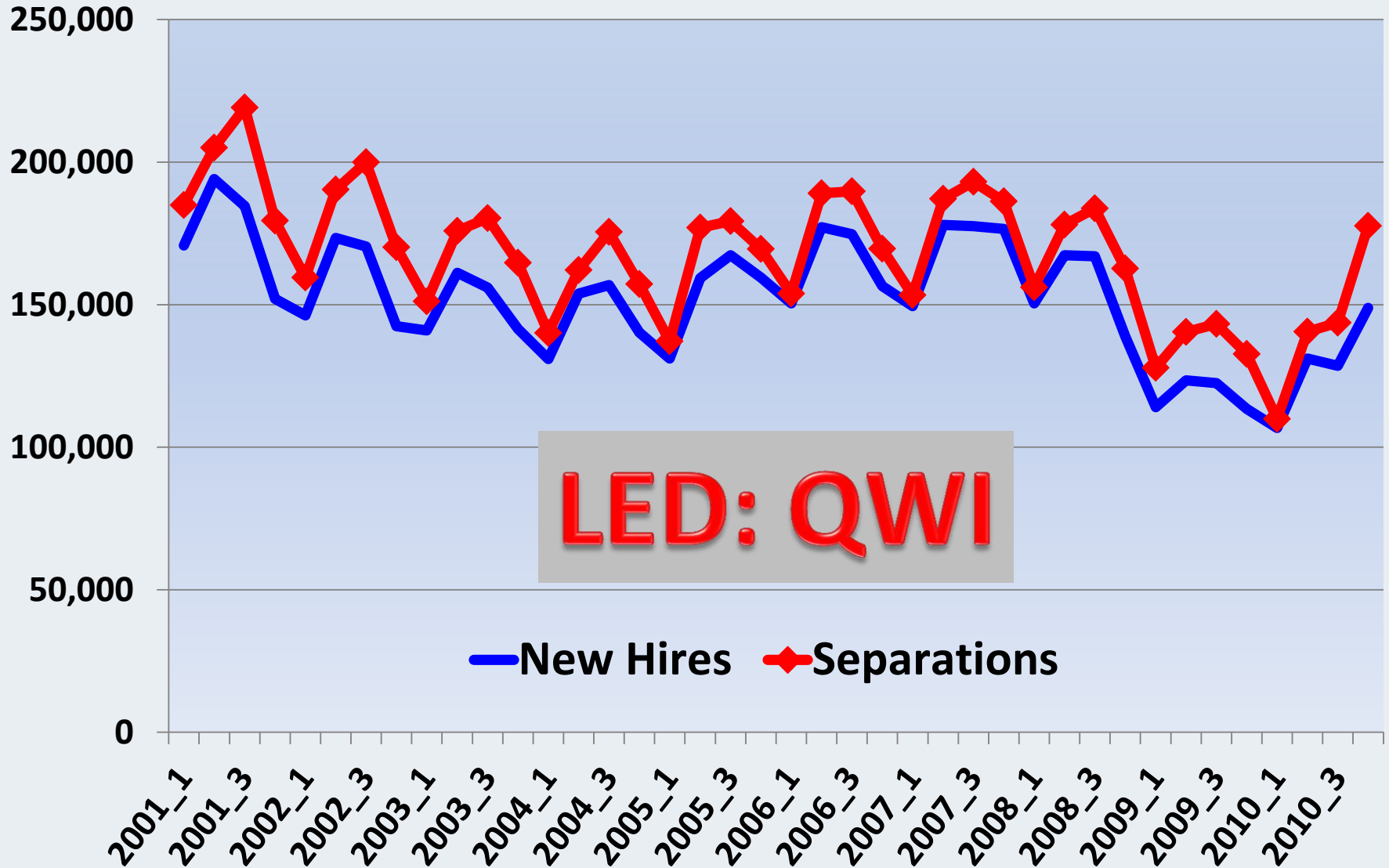
Job Churn: San Antonio MSA Private Sector New Hires

San Antonio New Hire Activity	Hiring (2010 4th)	Earnings All Workers	Earnings New Hires
All NAICS subsectors	55,321	\$3,518	\$2,223
Food Services & Drinking Places	9,426	\$1,494	\$1,068
Administrative & Support Services	5,804	\$2,871	\$1,971
Ambulatory Health Care Services	5,200	\$3,803	\$2,470
Professional, Scientific, Tech Services	2,864	\$5,254	\$3,774
Specialty Trade Contractors	2,106	\$3,507	\$2,664
Credit Intermediation Activities	1,407	\$4,105	\$2,048
Nursing & Health Care	1,226	\$4,126	\$1,126
Social Assistance	1,158	\$4,158	\$1,158
Hospitals	1,296	\$4,511	\$3,711
Accommodation	1,206	\$2,139	\$1,643
General Merchandise Stores	1,325	\$2,093	\$1,211
Insurance Carriers & Related Activities	991	\$6,434	\$4,112

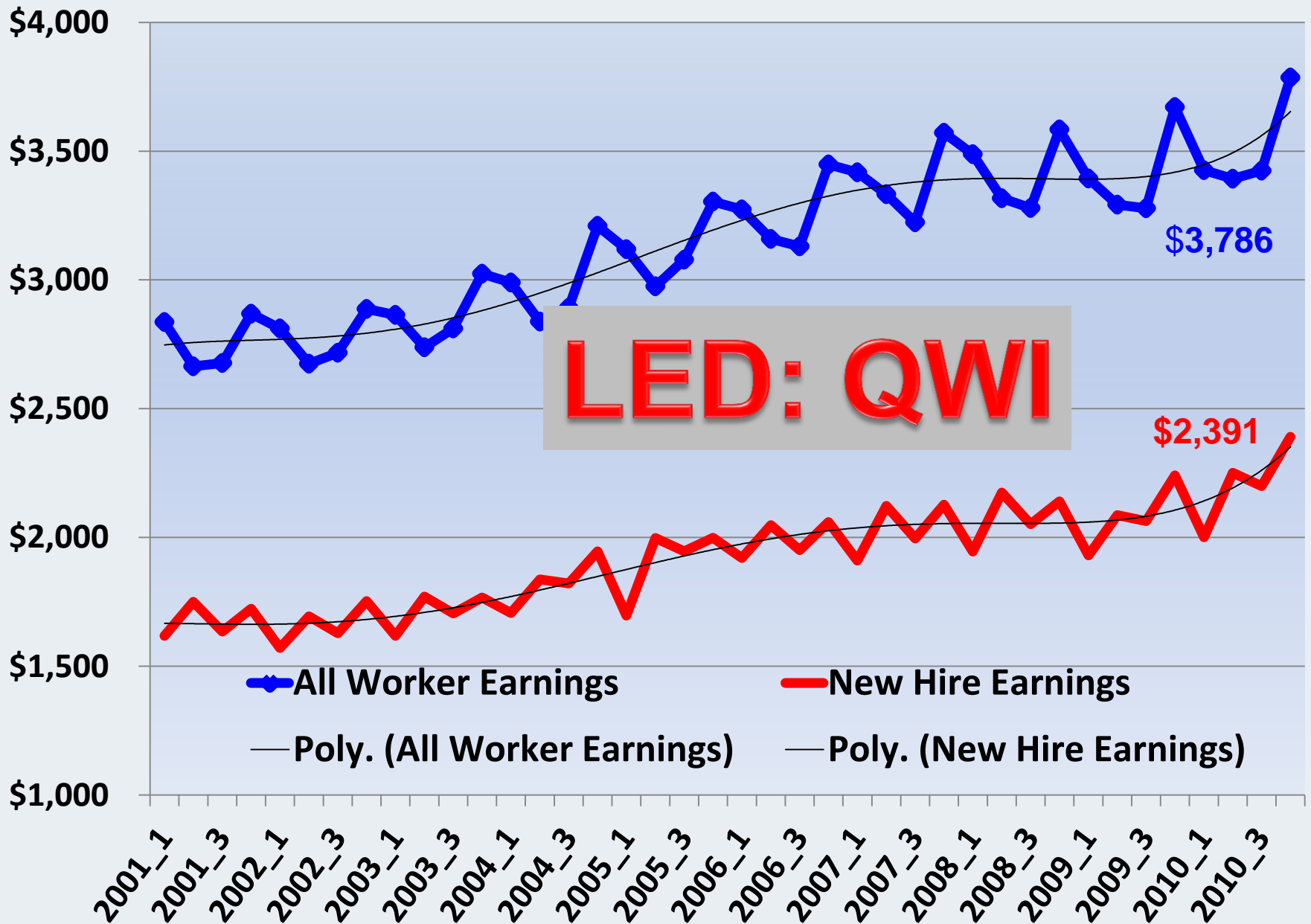
LED: Industry Focus

Increase in Job Activity: San Antonio MSA

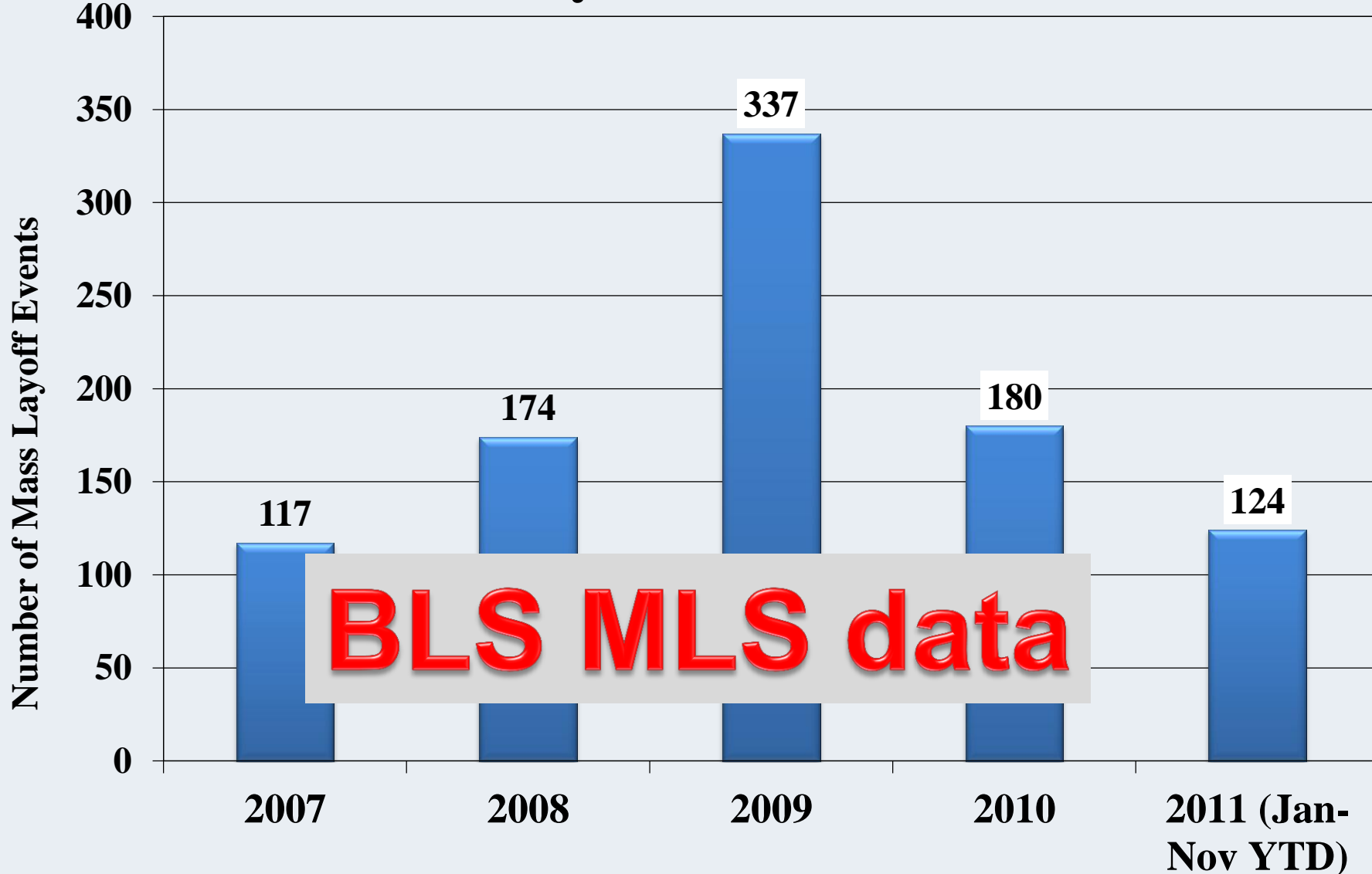
New Hires vs. Separations



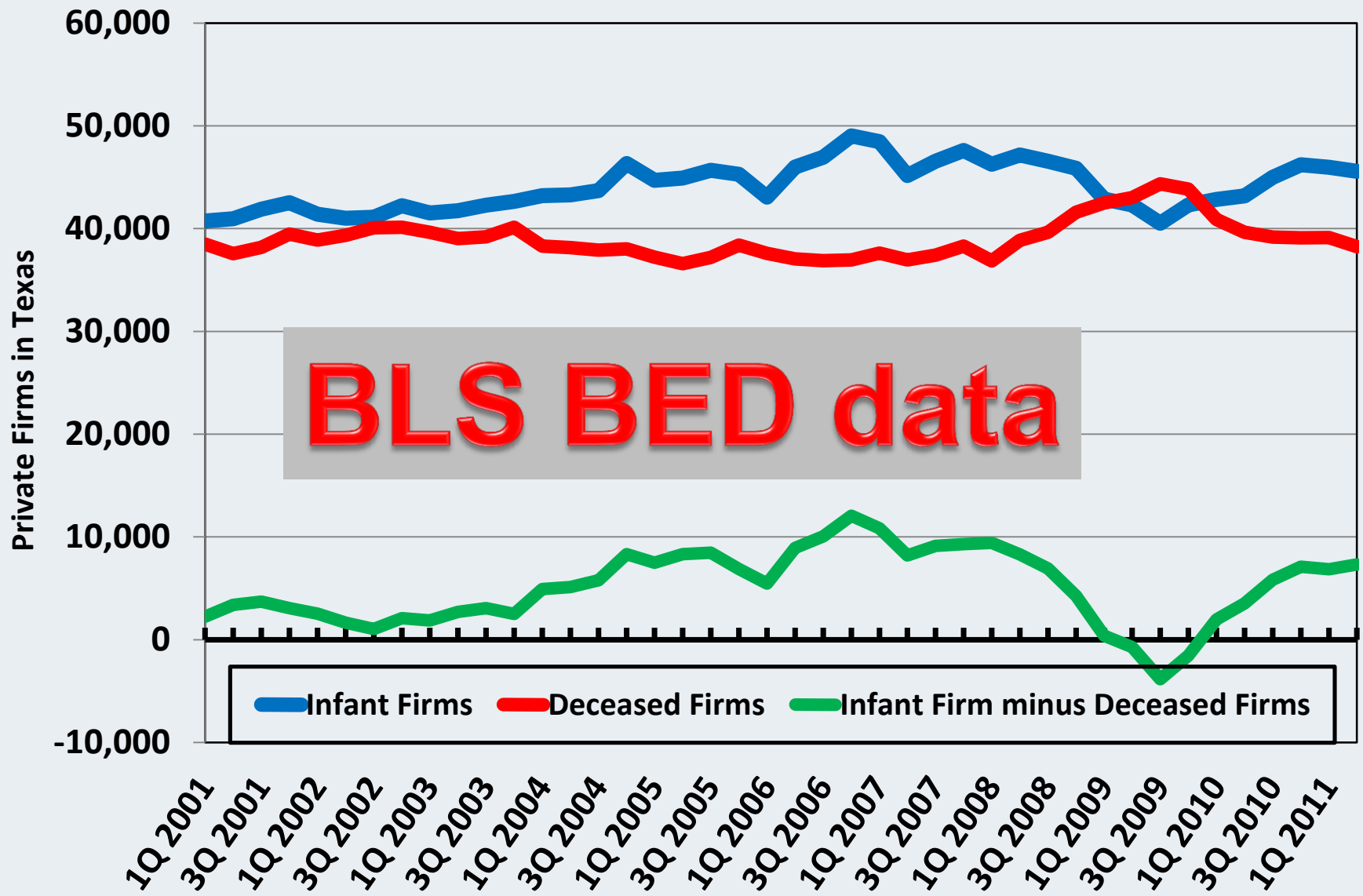
San Antonio MSA New Hire Earnings vs. All Workers



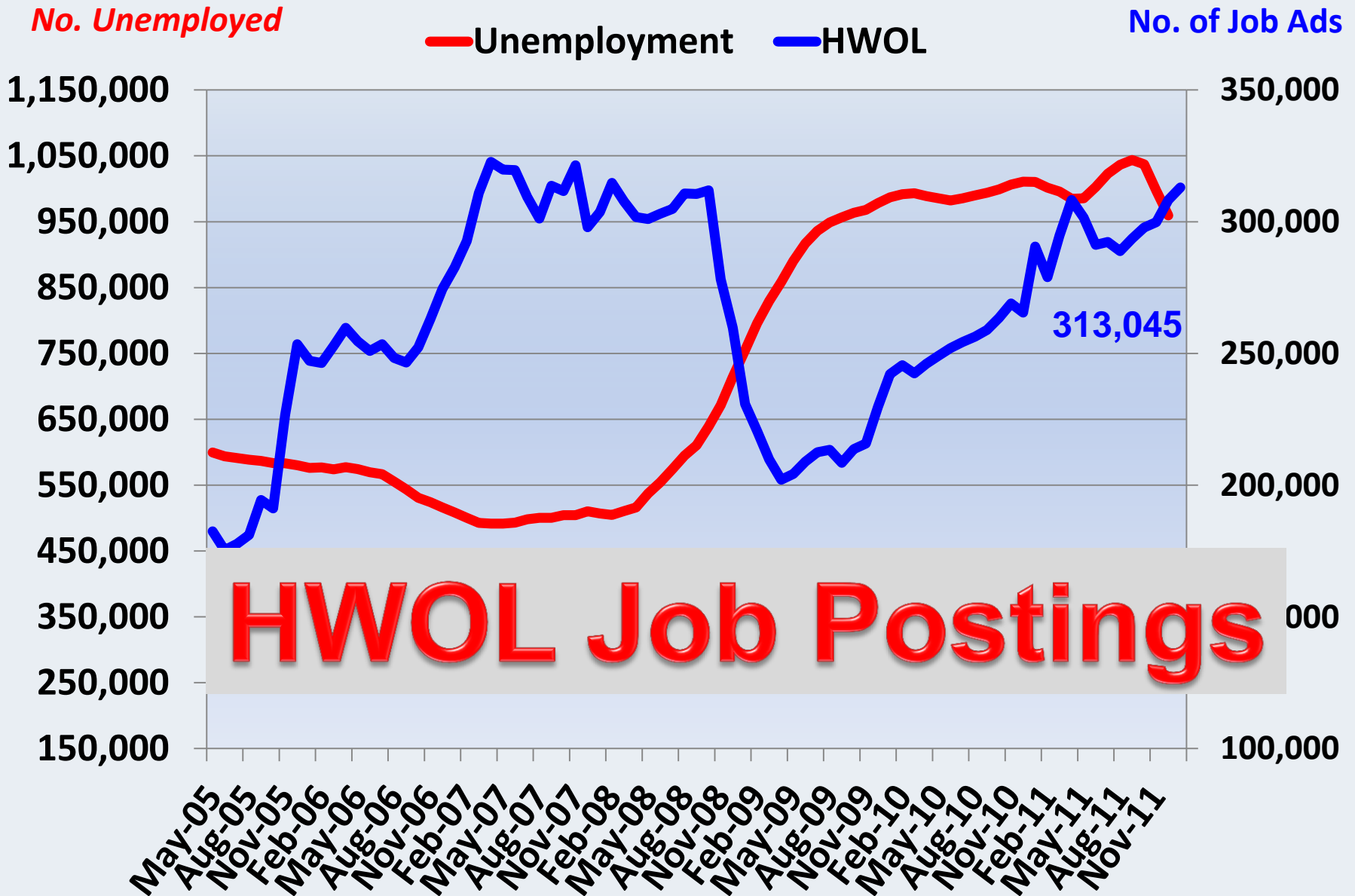
Mass Layoff Events in Texas



Texas Firm Births vs. Deaths



Texas Job Posting Activity: The Conference Board HWOL



San Antonio MSA HWOL Online Job Postings Last 90 Days Feb 2012

Occupation	Postings	CHG	Preferred training
Registered Nurses	2,193	326	Associate's/Bachelor's
Truck Drivers, Tractor-Trailer	2,006	1,011	Short term OJT
Customer Service Representatives	1,533	129	Moderate term OJT
Retail Salespersons	1,410	228	Short term OJT
Computer Support Specialists	1,037	42	Associate's degree
Supervisors, Retail Sales Workers	983	104	Related work experience
Network Systems Administrators	922	23	Bachelor's degree
Supervisors, Food Prep Workers	873	159	Related work experience
Exec. Sec			experience
Non-te			experience
Web Developers	747	120	Associate's degree
Supervisors, Admin Support	732	69	Related work experience
Medical & Health Srvcs Managers	715	13	Bachelor's degree plus
Physical Therapists	702	180	Master's degree

HWOL Job Postings

Short-term Forecasted Job Growth by Region

LWDA	2010	2011	2012	AVG 2009-12
Lower Rio Grande/Brownsville	2.5	2.8	2.8	2.7%
Travis County/Austin	2.1	2.5	2.7	2.4%
South Texas/McAllen	2.0	2.2	2.2	2.2%
Alamo/San Antonio	1.8	2.2	2.4	2.1%
Rural Capital/Round Rock	1.9	2.2	2.2	2.1%
Permian /Midland-Odessa	1.5	2.0	2.1	1.9%
Central Texas/ Killeen-Temple	1.4	1.7	1.9	1.7%
Upper Rio Grande/ El Paso	1.9	1.6	1.6	1.7%
Br	ETA Short term projections			5%
Heart of Texas/ Waco				1.4%
North Central Texas/Plano	0.7	1.6	1.6	1.3%
East Texas / Tyler	1.3	1.2	1.3	1.3%

Education Mismatch: Texas Unemployed vs. Job Postings

Education Requirement	2011 WIT Job Applicants	HWOL 2011 Postings
Doctoral Degree	0.6%	.8%
Professional Degree	0.3%	1.6%
Masters Degree	0.9%	3.6%
Bachelor's	7%	7.8%
Bachelor's		22.7%
Associate's Degree		10.0%
Post-secondary Vocational		9.3%
Job related work experience	84%	9.2%
Long-term On The Job training		4.4%
Medium-term On The Job training		15.4%
Short-term On The Job training	46.3%	15.3%
Source: Help Wanted On Line listings for Texas and Texas Workforce Commission		listings for Work In Texas database

TWC Agency data




Structural Mismatch: 2010 Graduates	Grads	Earnings
Multi-/Interdisciplinary Studies, Other	9,536	\$32,132
Business Administration, Mgmt & Operations	6,056	\$40,473
Psychology, General	5,169	\$22,613
Registered Nursing, Nursing Administration	4,745	\$59,359
Biology, General	4,517	\$21,737
Health and Physical Education/Fitness	3,457	\$23,454
Finance & Financial Mgmt Services	3,269	\$37,160
Accounting & Related Services	3,083	\$33,583

M	Higher Education/IPEDS		93
C			39
English Language and Literature, General	2,455	\$25,124	
Liberal Arts, General Studies & Humanities	2,359	\$30,074	
History, General	2,245	\$24,016	
Political Science & Government	2,208	\$25,037	
Public Relations & Advertising	1,772	\$27,579	

Storytelling Lessons to Take Home

- Do not let the perfect be the enemy of the good – you are not a wizard!
- Unfold the story: No one data source or program tells an interesting story by itself
- There are no good or bad data; all data have strengths and weaknesses
- LED data do not have to be the whole show to contribute value to the story
- When all else fails, close with a joke...

How many Millenials does it take to screw in a light bulb?

1. One to  the instructions
2. One to post the instructions on the wall
of their  page
3. One to post the  video of their
work showing collaboration

**One Baby Boomer to tell them what a
terrific, wonderful, spectacular job they
did with the light bulb**

**There is much more story to
tell, but this version is over**

Thank you!

richard.froeschle@twc.state.tx.us