

SIXTH ANNUAL

# TALENT

# ATTRACTION

SCORECARD

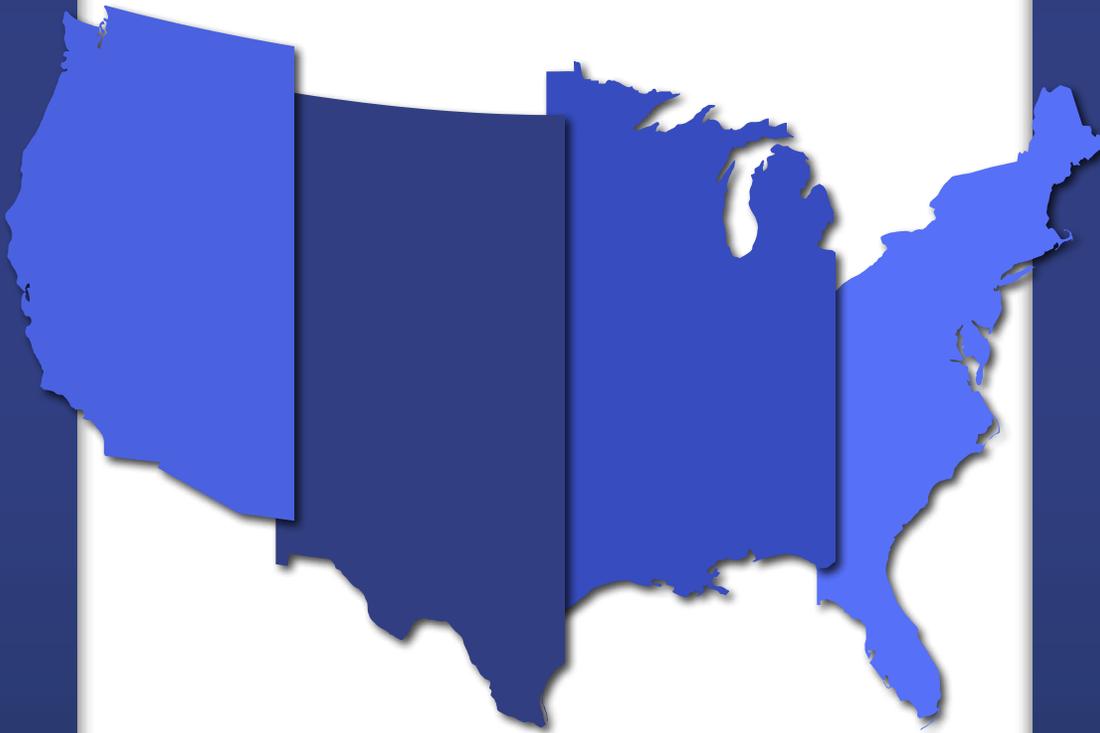


SIXTH ANNUAL

TALENT

ATTRACTION

SCORECARD



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Sixth Annual Talent Attraction Scorecard

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# THE NEED FOR TALENT (PEOPLE)

**MUCH OF 2020** was spent theorizing what life would look like in a post-COVID world. For those in economic and workforce development, this meant a lot of discussion on what work would look like, where it would be done, and how communities would succeed or stumble as a result.

With [job openings over 10 million](#), often the search for talent has moved from finding the candidate with the right skills to simply finding any candidate (there are only 85 unemployed people for every 100 job openings). Communities that are effectively attracting and developing talent to fill openings hold the holy grail for growth and prosperity.

Launched six years ago, the Talent Attraction Scorecard ranks counties on how well they're doing at developing their talent pool. Rankings are based on:

- ▶ **IRS migration data**
- ▶ **Regional competitiveness**
- ▶ **Job growth (overall and skilled)**
- ▶ **Job openings per capita**
- ▶ **Education attainment**

To provide an additional view and context, this year's report also looks at profile migration data of the largest metros to see where people moved in 2020. Three themes emerged:



The impact of decades of **low birth rates** is beginning to show



The attractiveness of **suburbs and exurbs** is growing



**Regional trends** have the Northwest, Mountain West, and Southeast leading

But more important than where your community ranks or the trends in play, is how you plan to improve and build upon your efforts. In our strategies section, we dive into five different phases of talent attraction and development that your community can use to climb in the rankings.

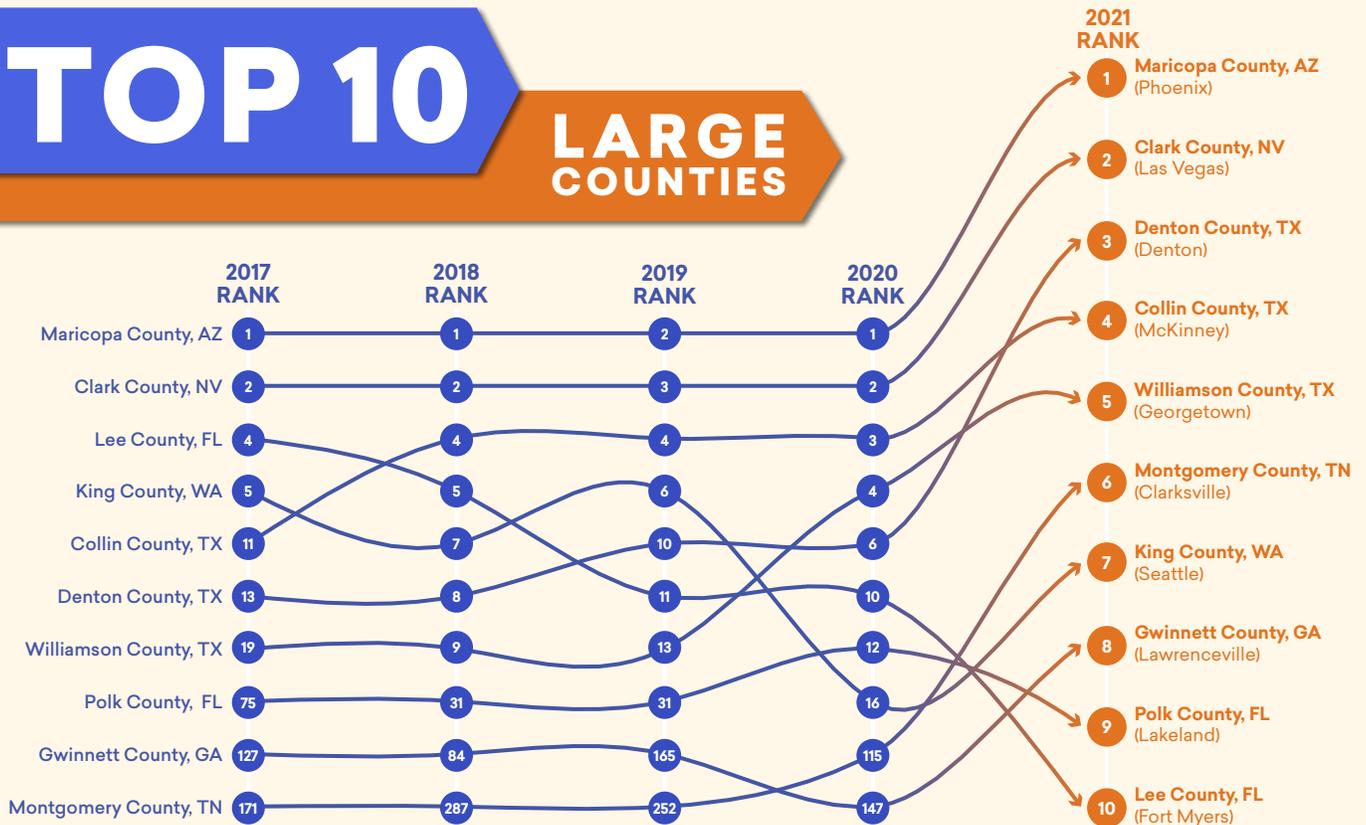
# LARGE COUNTIES POP. 100K+

THE TOP 10 large county rankings continue to be led by familiar names. Here are the highlights:

- ▶ Four counties in the top 5 were there last year: **Maricopa, AZ; Clark, NV; Collin, TX; and Williamson, TX**
- ▶ After being ranked No. 23 or higher since the Scorecard's inception, **Denton County, TX** broke into the top five for the first time.
- ▶ **Maricopa County, AZ** continues its reign in the number one spot, now taking the top honors in four of the last six years.
- ▶ At a state level, **Texas and Florida** maintain strong showings. Texas ranked three counties in the top 10 (Montgomery County, TX fell just out, from No. 9 to No. 11). Meanwhile, Florida now has 15 counties in the top 40.

## TOP 10

## LARGE COUNTIES

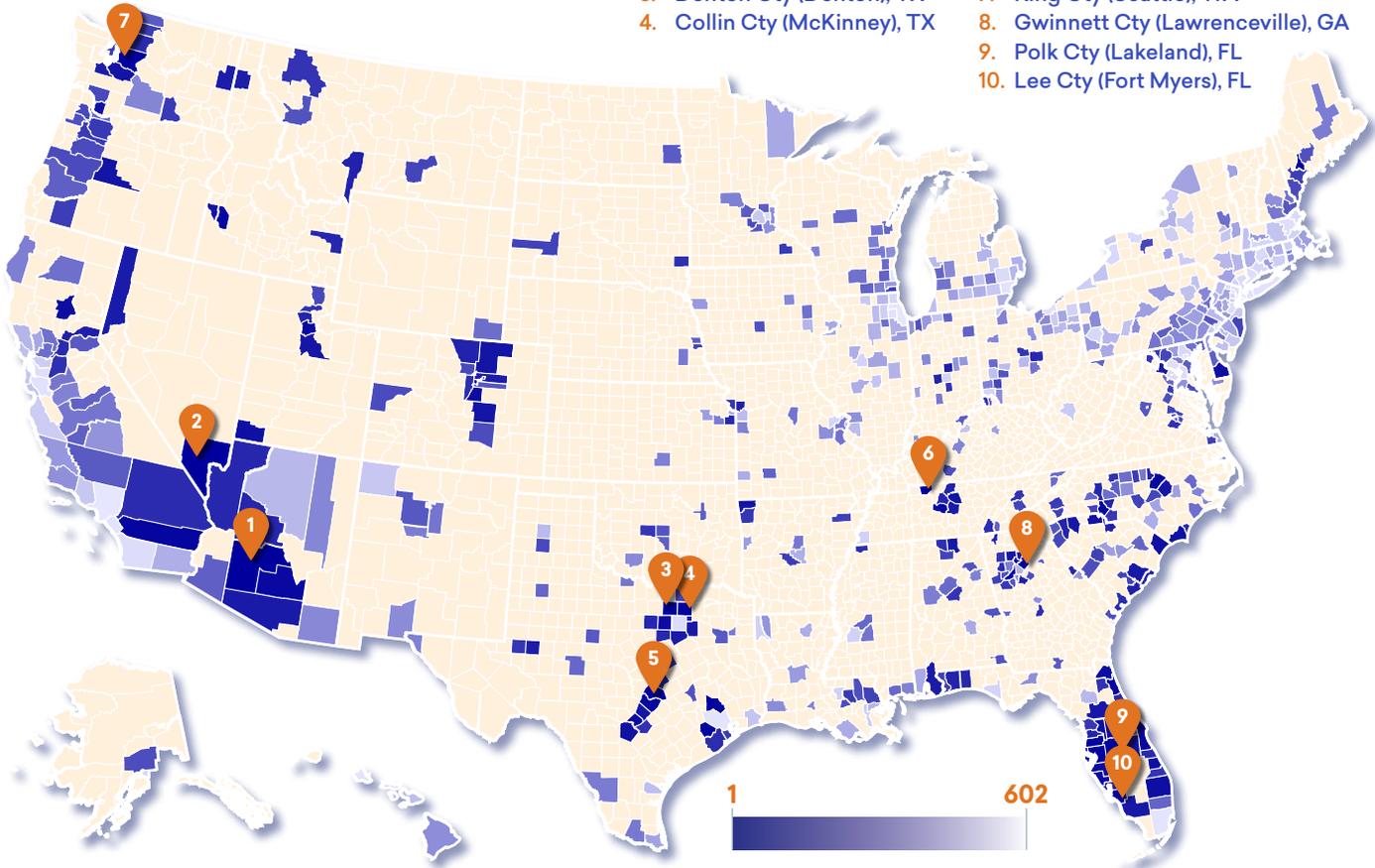


Emsi Burning Glass Labor Market Analytics, 2021

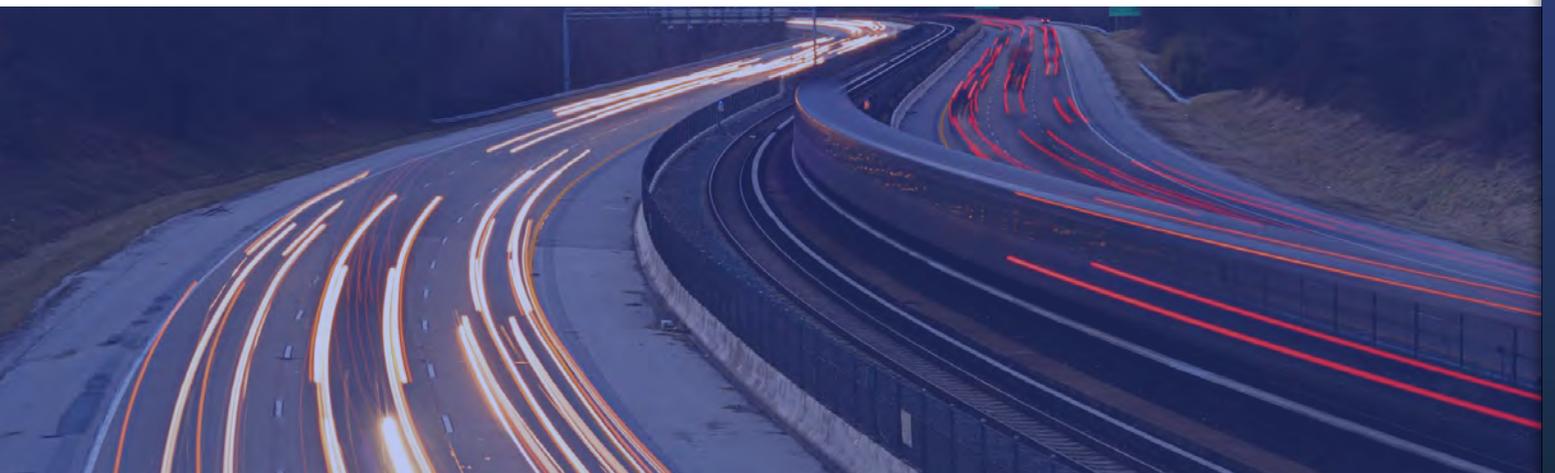
However, the top 10 was not without some shakeup. In this category, big swings in rank are less common due to greater existing populations, which make large percentage changes in the metrics more difficult. But for this same reason, it also means it's noteworthy when a county makes a breakthrough into the top 10.

## Large County Ranks (100K+)

1. Maricopa Cty (Phoenix), AZ
2. Clark Cty (Las Vegas), NV
3. Denton Cty (Denton), TX
4. Collin Cty (McKinney), TX
5. Williamson Cty (Georgetown), TX
6. Montgomery Cty (Clarksville), TN
7. King Cty (Seattle), WA
8. Gwinnett Cty (Lawrenceville), GA
9. Polk Cty (Lakeland), FL
10. Lee Cty (Fort Myers), FL

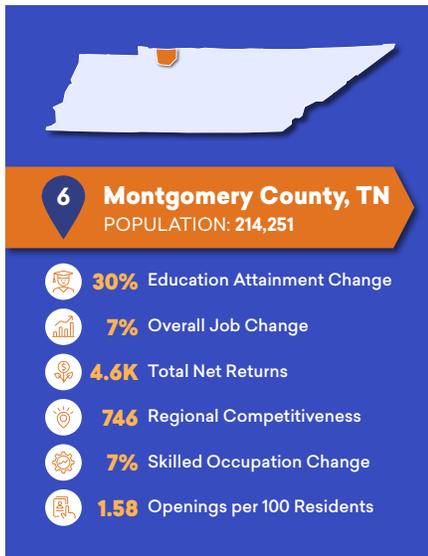


Source: Emsi Burning Glass Labor Market Analytics, 2021



# BIG BREAKTHROUGHS

## Montgomery County, Tennessee



Due to major growth in education attainment, population, and jobs, Montgomery County, sitting about an hour northwest of Nashville, saw an impressive rise from No. 115 last year to the No. 6 spot. Furthermore, the county weathered 2020 incredibly well, with jobs falling only 1% from their pre-pandemic level.

Education attainment jumped 30% overall with the percentage of residents holding an associate's degree rising 32%, a bachelor's degree rising 25%, and a graduate degree and higher rising an incredible 40% (9,636 in 2016 to 13,486 in 2020). Montgomery's local university, Austin Peay, is a huge advantage

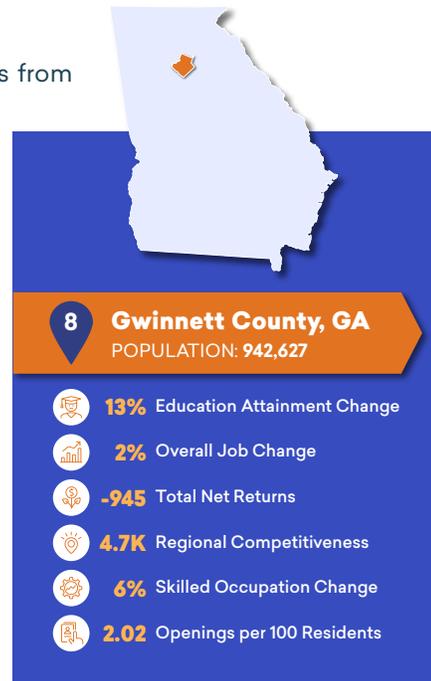
with graduates regularly putting down roots. More than 26% (6,700) of online profiles of Austin Peay graduates are located in county seat Clarksville, with another 15% (3,700) in nearby Nashville.

The county saw a 96% growth in net migration and a 10% growth in population (nearly 20,000 residents). That growth is far more substantial for Montgomery than the other top ten counties, as its 2020 population of 214,000 is far less than the next smallest county: Williamson County, TX at 617,000.

Montgomery saw a 7% growth in both skilled jobs and overall jobs from 2016 to 2020. One reason is a robust manufacturing base. Back in 2018 LG Electronics opened a 1 million square foot facility manufacturing washing machines that brought 600 jobs. And earlier this year an expansion was announced that will bring more than 300 additional jobs. Also, in 2020 AtlastBx (part of the Hankook Tire brand) began operations of its new battery manufacturing facility, hiring nearly 200. And early this year, the electric vehicle battery manufacturer Microvast announced plans for a \$220 million facility in Montgomery County that will create 287 jobs.

## Gwinnett County, Georgia

Gwinnett County makes its first appearance in the top 10, jumping from No. 147 last year to No. 8. Gwinnett lies on the outskirts of the Atlanta MSA, and although it saw a loss in net returns, this still



## VITALS OF THE OTHER TOP 10

represents a 23% increase in migration, which contributed to a modest 4% population growth from 2016–2020. But its population is projected to grow by 7.2% from 2020-2025, much higher than the statewide projected growth of 5.6%.

The region is taking advantage of being in one of the **most business friendly states** and maintains a diverse economy with 25% job growth in construction; 17% in health care and social assistance; and 12% in the professional, scientific, and technical services industry over the last five years. Gwinnett's ascension in the rankings was also driven by an education attainment rise of 13%.

Part of Gwinnett's success may be in what it *doesn't* have: an employment base buoyed by the public sector. Many communities have strong job and employment numbers due to government jobs, but ultimately these types of jobs don't generate new dollars in the community. Gwinnett has 20,000 fewer government jobs than would be expected for a community of its size, meaning more traded sector dollars and jobs.

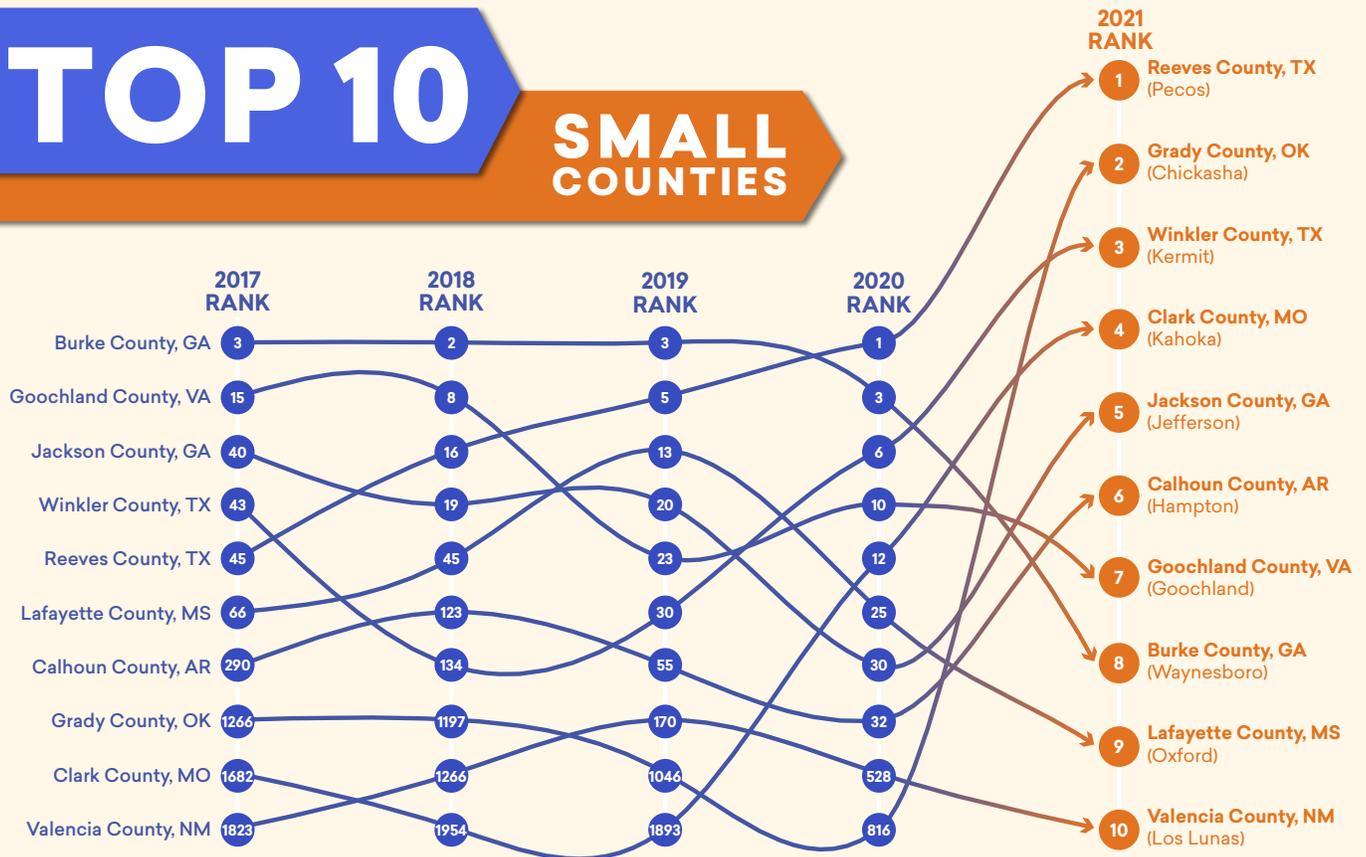
The community has experienced 6% growth in skilled occupations and has its sights set on more. **Rowen** is a recently launched knowledge community that will include offices, research facilities, public spaces, residences, and preserved green space. The nearly 2,000-acre community will have industry focuses on medical, agricultural, and environmental sciences.



# SMALL COUNTIES POP. 5K-99K

WITH ONLY FOUR COUNTIES holding on to their spots in the top 10 from last year—Reeves County, TX; Burke County, GA; Winkler County, TX; and Goochland County, VA—the small county category had a fair amount of shakeup.

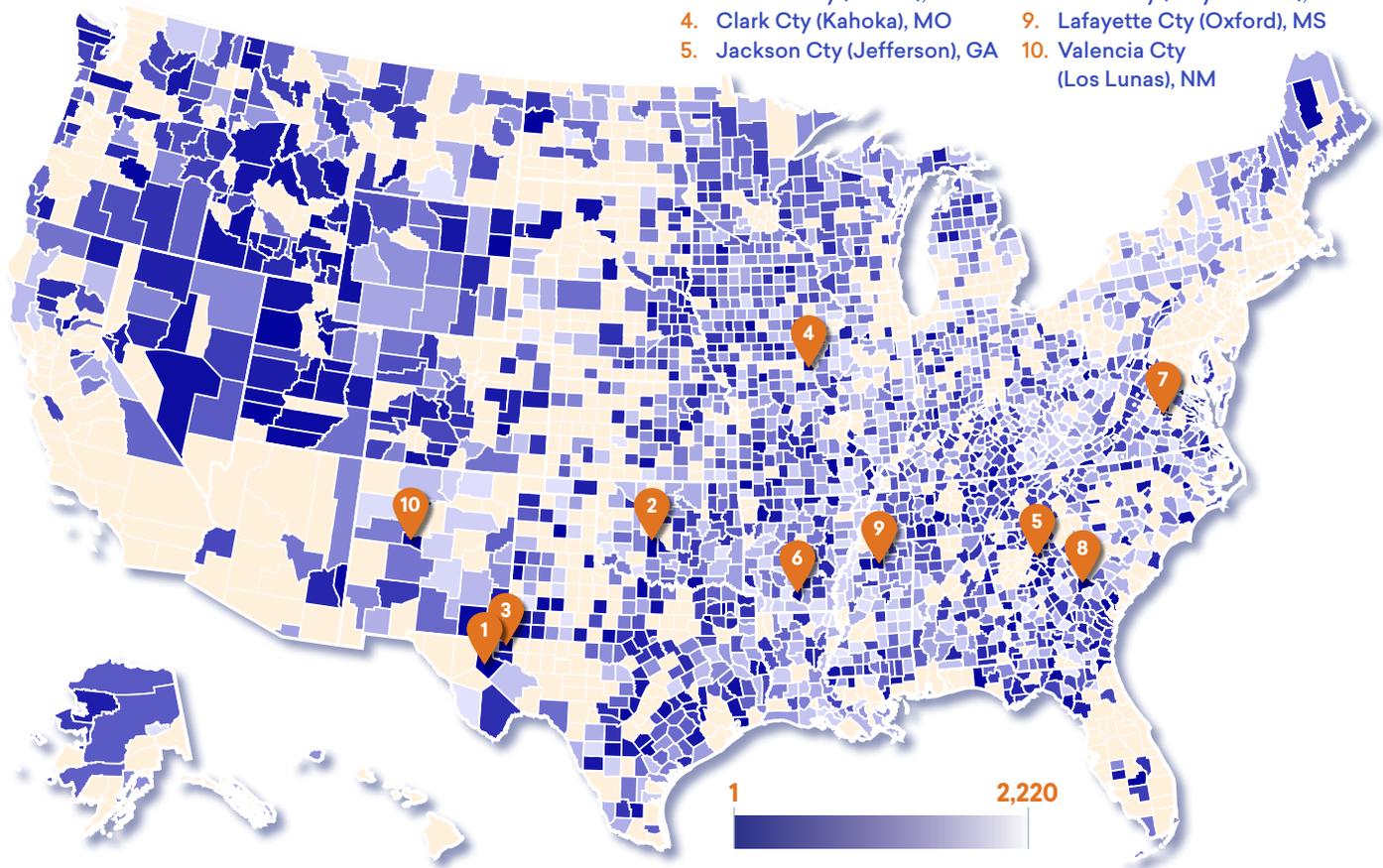
Reeves County continues to have great marks across all metrics. As one of the top oil and gas producing counties in Texas, and consequently the country, Reeves attracts an educated and highly skilled workforce. The county's education attainment has risen 39% and skilled occupations 73%. Current job postings reveal the top posters to be energy companies (Noble Energy, Occidental Petroleum, and Apache Corporation to name a few) and staffing firms for the energy industry.



Emsi Burning Glass Labor Market Analytics, 2021

## Small County Ranks (5K–99K)

1. Reeves Cty (Pecos), TX
2. Grady Cty (Chickasha), OK
3. Winkler Cty (Kermit), TX
4. Clark Cty (Kahoka), MO
5. Jackson Cty (Jefferson), GA
6. Calhoun Cty (Hampton), AR
7. Goochland Cty (Goochland), VA
8. Burke Cty (Waynesboro), GA
9. Lafayette Cty (Oxford), MS
10. Valencia Cty (Los Lunas), NM



Source: Emsi Burning Glass Labor Market Analytics, 2021

Burke County, GA has now been in the top 10 for five straight years. Jobs are up a robust 32%, driven largely by the expansion of the Vogtle Electric Generating Plant. The two-unit nuclear power plant began construction in 2013 on two additional reactors, with expected completion of December 2021 and November 2022. The key for Burke will be translating the infusion of jobs and local sales from the construction boom to long-term economic growth.

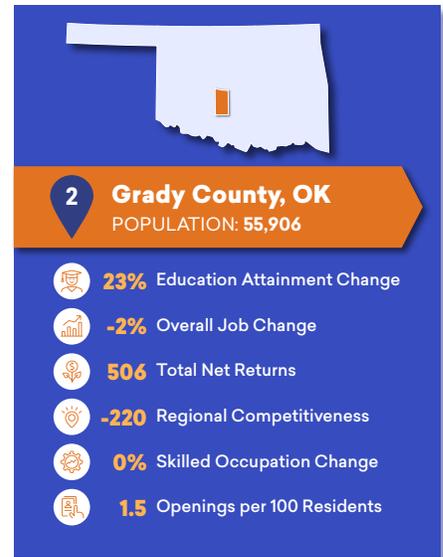
Goochland County, VA highlights the benefits of an anchor legacy employer when in 2000 Capital One's West Creek Campus opened and now employs more than 5,000. The county's education attainment has risen 123% in that time and 24% since 2016. Adjacent to the state capital of Richmond, the county has also benefited from in-migration from Richmond and its surrounding counties: Henrico and Chesterfield. Migration is up 181% between 2015 and 2019, with these three counties leading the way amongst inbound movers.

While major shifts are less common in large counties, they are more frequent among small counties as a single new facility, policy change, or grant can have big impacts on population, investment, and jobs. Grady County, OK and Valencia County, NM are two counties that made big leaps this year.

## Grady County, Oklahoma

Grady County, just southwest of Oklahoma City, was propelled 814 spots to No. 2 due to a 118% increase in migration, and a 23% increase in education attainment. The northern parts of the county contain all or parts of the fast-growing “Tri-City” communities: Newcastle, Tuttle, and Blanchard, which still allow for commuting into Oklahoma City.

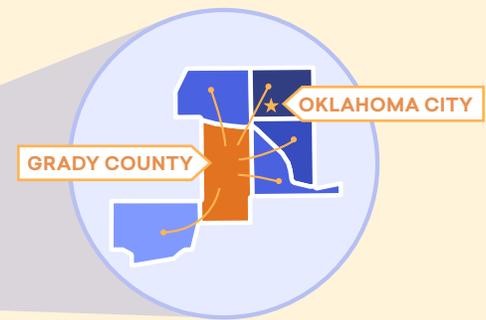
This growth is likely also aided by local graduates staying. Grady is adjacent to Norman, Oklahoma and the University of Oklahoma. And the county is also home to the University of Science and Arts of Oklahoma. Graduates staying in the area coupled with migration makes a nice combo for education attainment.



## Top 5 Commuting Destinations for Grady County (Chickasha), 2020

### # of Outbound Commuters

- Oklahoma County: **5,122**
- Cleveland County: **1,197**
- Canadian County: **802**
- McClain County: **796**
- Comanche County: **645**

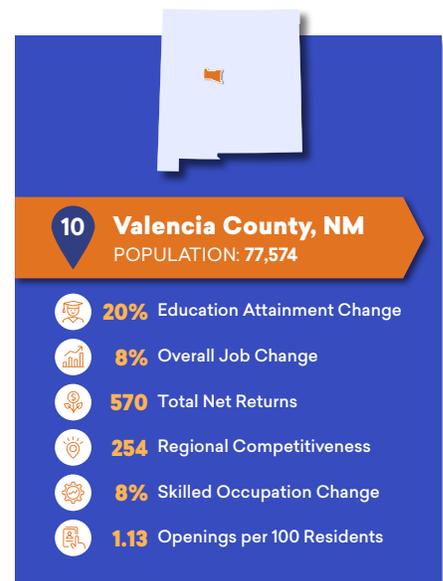


Source: Emsi Burning Glass Labor Market Analytics, 2021

## Valencia County, New Mexico

Valencia County has seen a string of notable investments, beginning with a [Facebook data center](#) that came online in 2019. Roughly 300 permanent jobs are expected to go along with 1,000 construction workers who will be employed on-site through 2023. An addition of as many as six buildings has also been proposed. Niagara Bottling and manufacturer Keter Plastics also made announcements shortly after.

With these investments, overall job growth and skilled job growth rose 8% to go along with a 20% rise in educational attainment. Migration jumped 367% contributing to its steady population growth. All this spurred Valencia’s first appearance in the top 10. Its previous high was No. 170 in 2019.



# VITALS OF THE OTHER TOP 10

**1 Reeves County, TX**  
POPULATION: 15,949

- 39%** Education Attainment Change
- 51%** Overall Job Change
- 320** Total Net Returns
- 1,130** Regional Competitiveness
- 73%** Skilled Occupation Change
- 4.89** Openings per 100 Residents

**3 Winkler County, TX**  
POPULATION: 7,887

- 11%** Education Attainment Change
- 66%** Overall Job Change
- 20** Total Net Returns
- 611** Regional Competitiveness
- 58%** Skilled Occupation Change
- 5.14** Openings per 100 Residents

**4 Clark County, MO**  
POPULATION: 6,830

- 28%** Education Attainment Change
- 54%** Overall Job Change
- 4.5K** Total Net Returns
- 230** Regional Competitiveness
- 44%** Skilled Occupation Change
- 2.48** Openings per 100 Residents

**5 Jackson County, GA**  
POPULATION: 76,199

- 45%** Education Attainment Change
- 29%** Overall Job Change
- 3,721** Total Net Returns
- 1,136** Regional Competitiveness
- 19%** Skilled Occupation Change
- 1.67** Openings per 100 Residents

**6 Calhoun County, AR**  
POPULATION: 5,113

- 21%** Education Attainment Change
- 21%** Overall Job Change
- 35** Total Net Returns
- 354** Regional Competitiveness
- 37%** Skilled Occupation Change
- 5.49** Openings per 100 Residents

**7 Goochland County, VA**  
POPULATION: 24,431

- 24%** Education Attainment Change
- 17%** Overall Job Change
- 1,154** Total Net Returns
- 1,773** Regional Competitiveness
- 28%** Skilled Occupation Change
- 5.42** Openings per 100 Residents

**8 Burke County, GA**  
POPULATION: 22,648

- 32%** Education Attainment Change
- 36%** Overall Job Change
- 24** Total Net Returns
- 1,001** Regional Competitiveness
- 21%** Skilled Occupation Change
- 6.85** Openings per 100 Residents

**9 Lafayette County, MS**  
POPULATION: 54,408

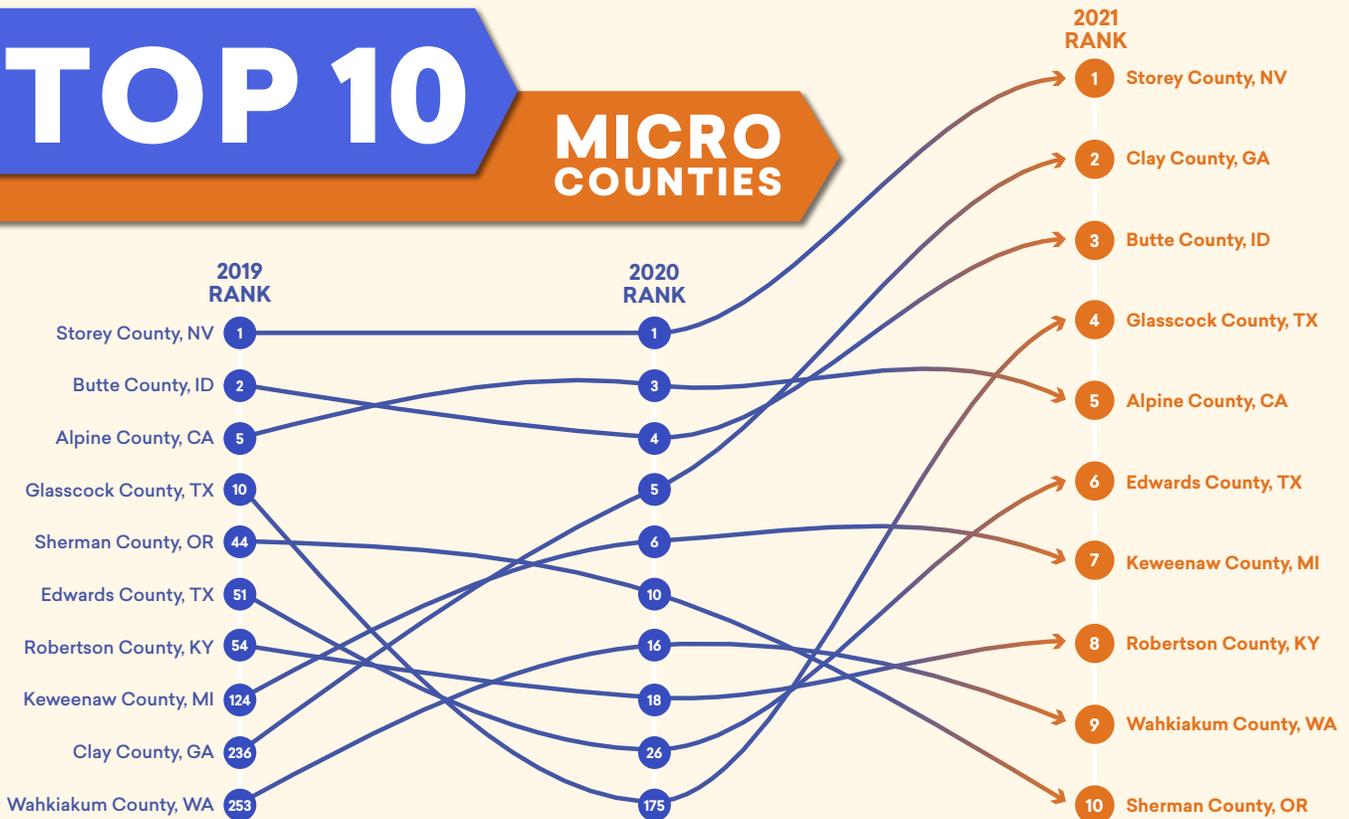
- 26%** Education Attainment Change
- 18%** Overall Job Change
- 106** Total Net Returns
- 3.1K** Regional Competitiveness
- 35%** Skilled Occupation Change
- 3.76** Openings per 100 Residents



# MICRO COUNTIES POP. <5K

## TOP 10

### MICRO COUNTIES



Emsi Burning Glass Labor Market Analytics, 2021

## VITALS OF THE TOP 10



**4 Glasscock County, TX**  
POPULATION: 1,439

- 46% Education Attainment Change
- 59% Overall Job Change
- 28 Total Net Returns
- 162 Regional Competitiveness
- 68% Skilled Occupation Change
- 6.39 Openings per 100 Residents

**5 Alpine County, CA**  
POPULATION: 1,119

- 22% Education Attainment Change
- 50% Overall Job Change
- 27 Total Net Returns
- 141 Regional Competitiveness
- 64% Skilled Occupation Change
- 9.61 Openings per 100 Residents

**6 Edwards County, TX**  
POPULATION: 1,923

- 0% Education Attainment Change
- 76% Overall Job Change
- 9 Total Net Returns
- 178 Regional Competitiveness
- 95% Skilled Occupation Change
- 4.56 Openings per 100 Residents

**7 Keweenaw County, MI**  
POPULATION: 2,119

- 21% Education Attainment Change
- 57% Overall Job Change
- 25 Total Net Returns
- 106 Regional Competitiveness
- 93% Skilled Occupation Change
- 2.67 Openings per 100 Residents

**8 Robertson County, KY**  
POPULATION: 2,136

- 18% Education Attainment Change
- 57% Overall Job Change
- 14 Total Net Returns
- 130 Regional Competitiveness
- 91% Skilled Occupation Change
- 3.06 Openings per 100 Residents

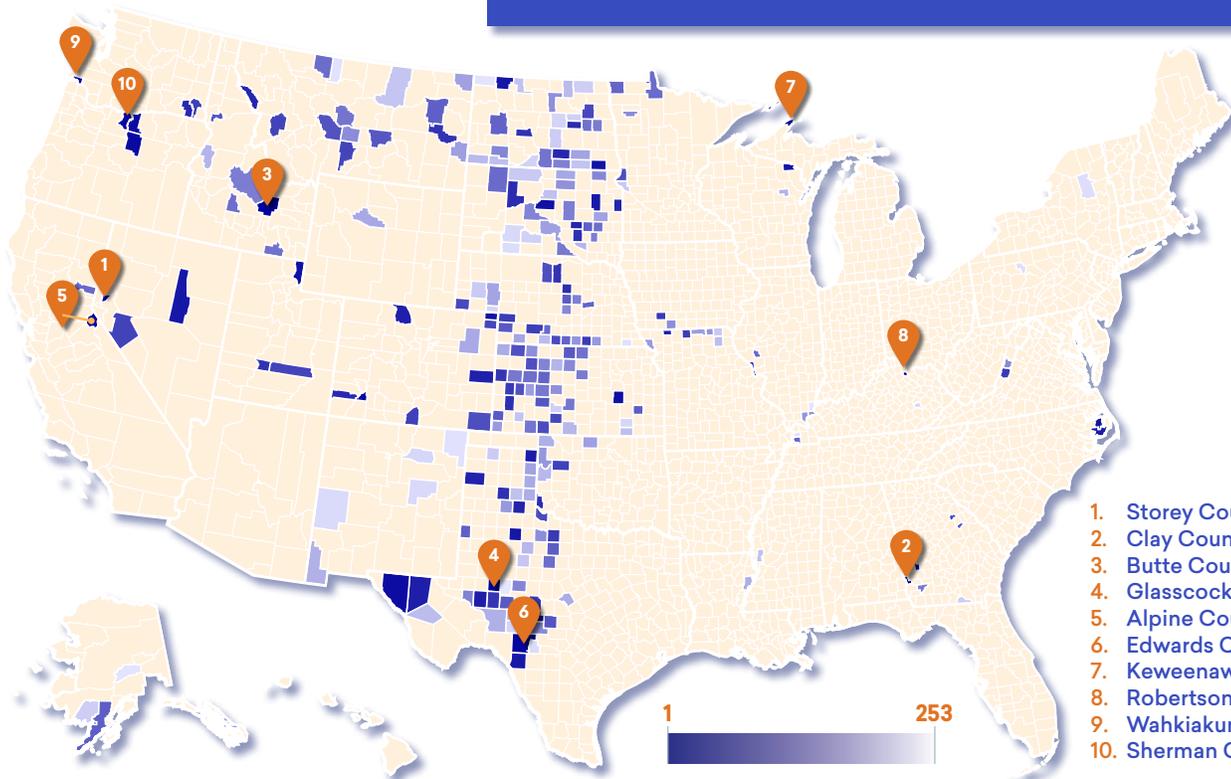
**9 Wahkiakum County, WA**  
POPULATION: 4,498

- 50% Education Attainment Change
- 58% Overall Job Change
- 204 Total Net Returns
- 151 Regional Competitiveness
- 65% Skilled Occupation Change
- 2.15 Openings per 100 Residents

**10 Sherman County, OR**  
POPULATION: 1,801

- 69 Total Net Returns
- 180 Regional Competitiveness
- 22% Education Attainment Change
- 61% Skilled Occupation Change
- 48% Overall Job Change
- 6.48 Openings per 100 Residents

## Micro County Ranks (< 5K)



1. Storey County, NV
2. Clay County, GA
3. Butte County, ID
4. Glasscock County, TX
5. Alpine County, CA
6. Edwards County, TX
7. Keweenaw County, MI
8. Robertson County, KY
9. Wahkiakum County, WA
10. Sherman County, OR

Source: Emsi Burning Glass Labor Market Analytics, 2021

## TO HAVE TALENT...

# COMMUNITIES NEED PEOPLE

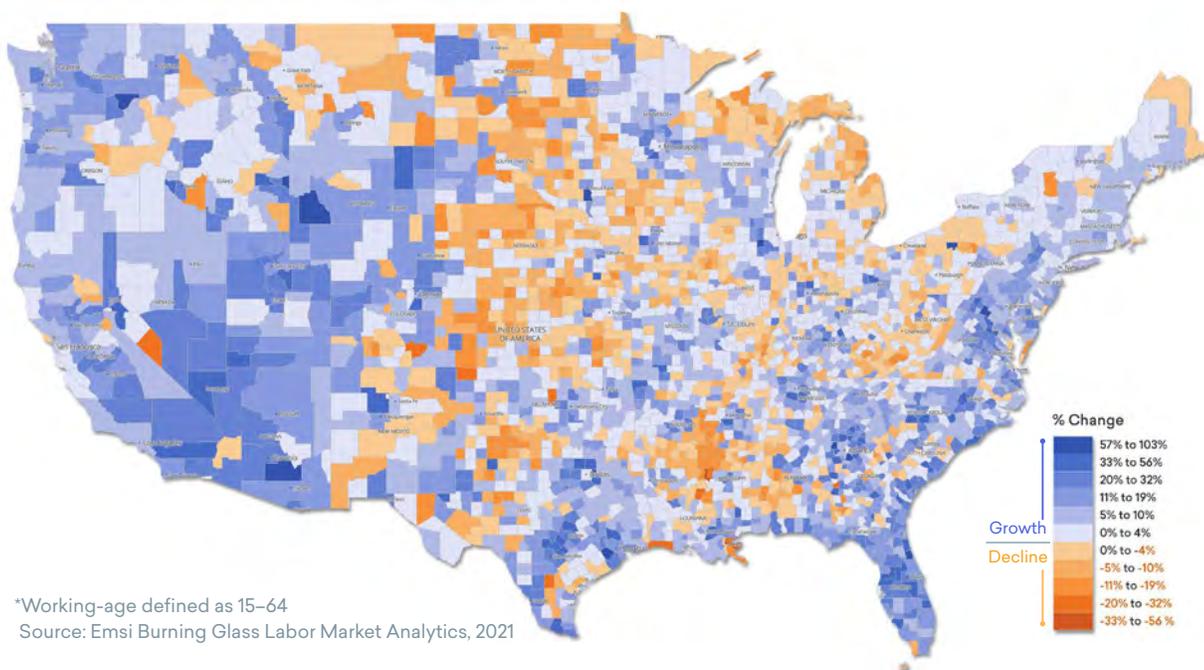
**TALENT ATTRACTION**, job growth, and economic development are naturally dependent on and a byproduct of a community having people.

But something staggering happened over the last decade: U.S. population growth has slowed to one of the lowest levels in our history. This is largely due to the national birth rate being in steady decline for decades and hitting a 35-year-low in 2019. And in 2020, deaths exceeded births in a record number of states. The U.S. is living below the population replacement rate (2.1 children per 1 woman), which means that talent shortages being experienced now will only compound in the coming years.

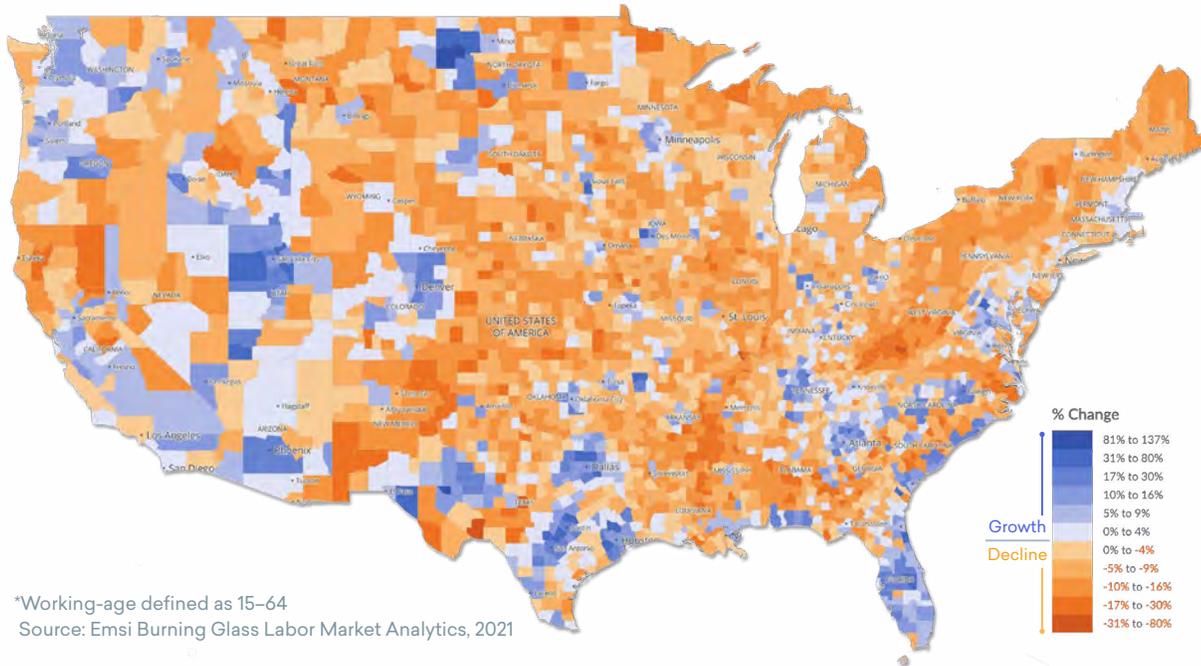
As a result, winners in talent attraction and development will simply be those with people. The runner-ups will be those that play the best defense and develop mitigation tactics (see the strategies section for steps that can be taken). Having a working-age population in the near term and young people coming up the ranks in the long term will be needed for staying competitive in talent attraction.

The decline in counties with working-age populations and under-15 populations between the last two decades reveals that many regions will need to mitigate the pending sansdemic.

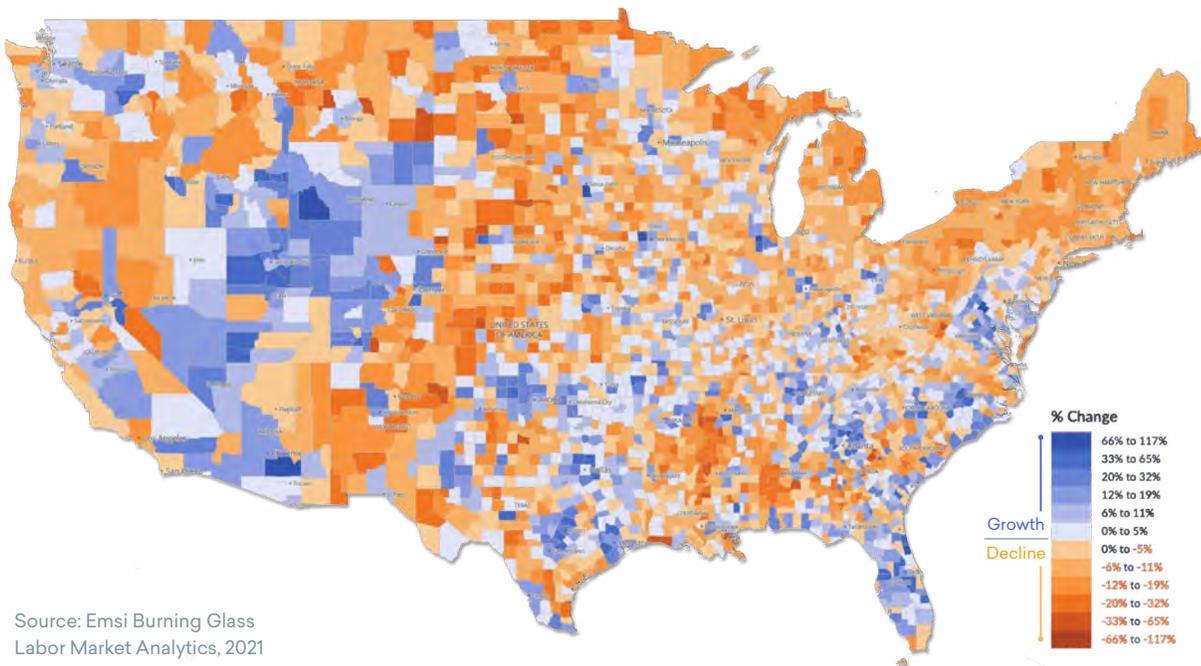
## % Change in working-age\* population by county, 2001–2010



## % Change in working-age\* population by county, 2010–2020

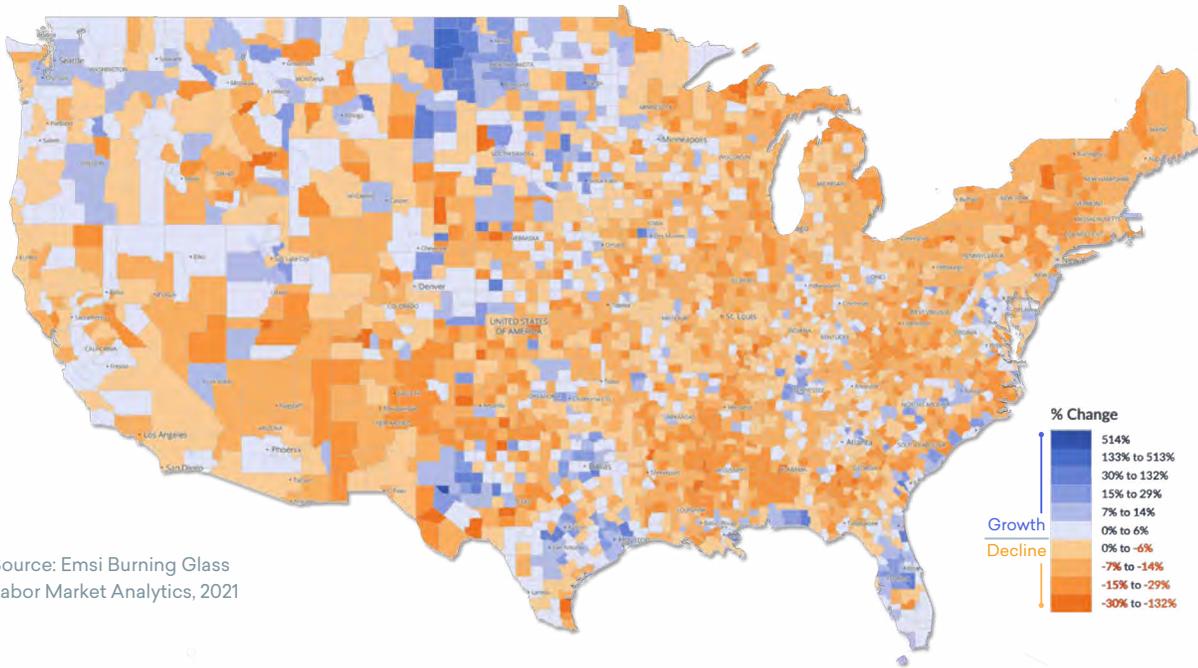


## % Change in under-15 population by county, 2001-2010



It's not surprising then to see that counties with the largest growth in working-age population all rank in the top 50 of large counties. Meanwhile, those with the biggest reductions in working-age population over the last five years dominate the bottom of the rankings.

## % Change in under-15 population by county, 2010-2020



Source: Emsi Burning Glass  
Labor Market Analytics, 2021

## Large counties, greatest change in working-age population and TAS Rank

County	State	2016 working-age pop.	2020 working-age pop.	Change	% Change	2021 TAS Rank
<b>LARGEST WORKING-AGE POPULATION INCREASE</b>						
Maricopa	AZ	2,775,732	2,975,192	199,460	7%	1
Clark	NV	1,416,205	1,518,822	102,617	7%	2
Collin	TX	640,041	728,348	88,307	14%	4
Denton	TX	560,616	638,010	77,394	14%	3
Travis	TX	866,910	936,668	69,758	8%	22
King	WA	1,517,638	1,585,148	67,510	4%	7
Riverside	CA	1,546,032	1,608,634	62,602	4%	13
Bexar	TX	1,286,470	1,347,551	61,081	5%	46
Tarrant	TX	1,355,747	1,416,691	60,944	4%	29
Williamson	TX	351,951	411,749	59,798	17%	5
<b>LARGEST WORKING-AGE POPULATION DECREASE</b>						
Orange	CA	2,139,461	2,108,292	-31,169	-1%	274
Cuyahoga	OH	820,030	785,880	-34,150	-4%	587
Honolulu	HI	646,312	611,733	-34,579	-5%	593
Wayne	MI	1,155,784	1,117,577	-38,207	-3%	592
New York	NY	1,175,944	1,134,072	-41,872	-4%	596
Bronx	NY	963,984	919,899	-44,085	-5%	597
Kings	NY	1,751,167	1,674,261	-76,906	-4%	599
Queens	NY	1,569,763	1,474,334	-95,429	-6%	600
Cook	IL	3,531,108	3,405,909	-125,199	-4%	601
Los Angeles	CA	6,938,177	6,759,194	-178,983	-3%	602

Source: Emsi Burning Glass Labor Market Analytics, 2021

# SPREADING OUT

## The attractiveness of suburbs and exurbs

Where people choose to live (migration) underpins other Scorecard metrics (job growth, education attainment, openings per capita, etc.). The Census data over the last decade reinforces a theme in Scorecard rankings: counties surrounding major metros, often the suburbs and exurbs of those metros, are growing. Indeed, the communities highlighted in this report all surround major metros.

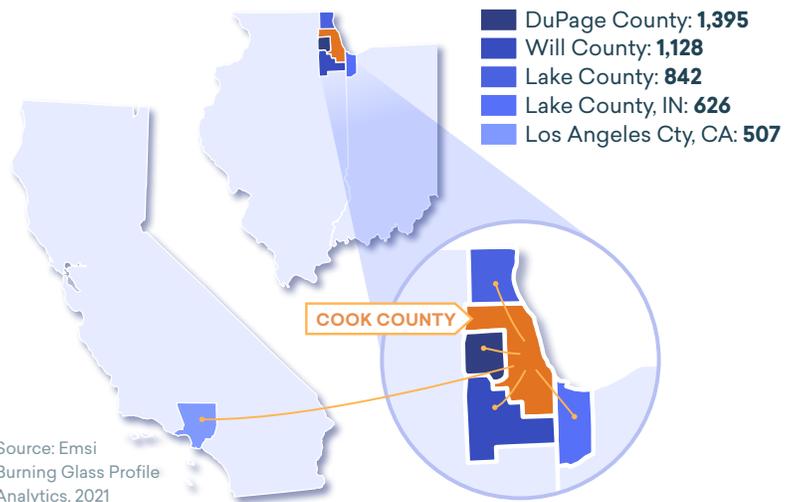
Last year we discussed how cities were changing and how that change could be accelerated by COVID factors (ex: increased acceptance of remote work and decreased expectation for in-office work). This isn't to say cities are dying or a mass exodus from them is occurring, but pre-COVID population trends point to a growth in metro-adjacent counties.

In an analysis of USPS and U.S. Census Bureau data, Bloomberg CityLab found that, "Those Americans who did move accelerated a trend that predates the pandemic: Dense core counties of major U.S. metro areas saw a net decrease in flow into the city, while other suburbs and some smaller cities saw net gains. In other words, people moved outward. Outward to the suburbs of their own core metro area, but also farther out, to satellite cities..."

And professional migration<sup>1</sup> data from 2020 reinforces this trend. When people left the largest US metro counties, the most common destination is an adjacent county. Of movers out of the five most populated cities, the vast majority went to surrounding counties. The exception was Phoenix residents, who opted for southern California counties.

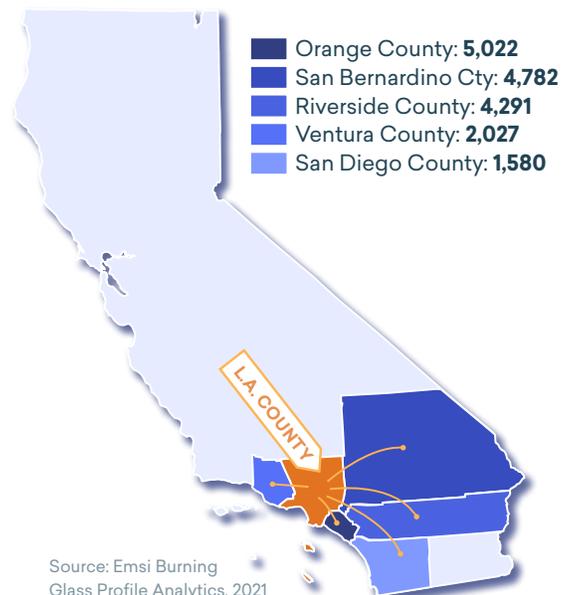
<sup>1</sup> Emsi Burning Glass uses Profile Analytics data to track the changes in a certain location from online profiles and resumes; we call it Professional Migration. One of the advantages of using Professional Migration is the ability to trace professionals' mobility with a significantly smaller lag time than that produced from the Census Migration or the IRS Migration datasets.

## Cook County (Chicago) outbound professional migration, 2020



Source: Emsi Burning Glass Profile Analytics, 2021

## Los Angeles County outbound professional migration, 2020



Source: Emsi Burning Glass Profile Analytics, 2021

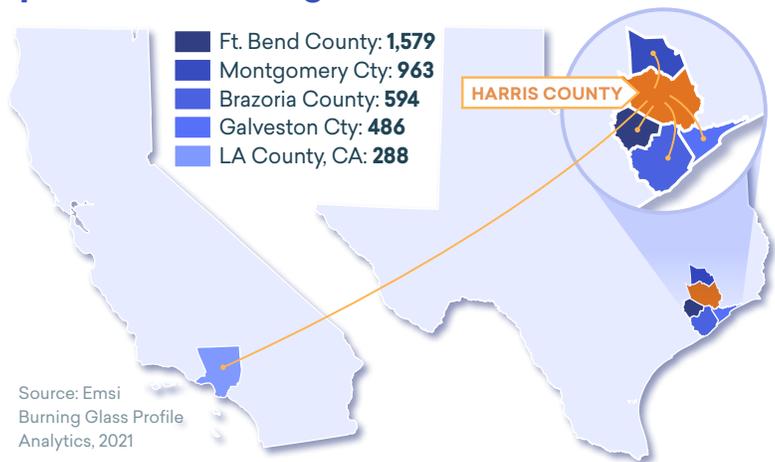
While some of this move to the suburbs was likely spurred by COVID factors (desire for more “private amenities”: a backyard, home office, etc), some of it is simply aging and changing tastes. And as noted earlier, this migration has been occurring for some time.

A recent study by the [Joint Center for Housing Studies of Harvard University](#) found, “...even before the COVID-19 pandemic, millennials moving into their prime homebuying years were increasingly choosing homes in suburban locations...In recent decades, many city centers experienced a resurgence, and the concentration of young adults in urban centers was one of the major drivers. However, as millennials age into their 30s and 40s, their urban presence may have peaked and could decline further.”

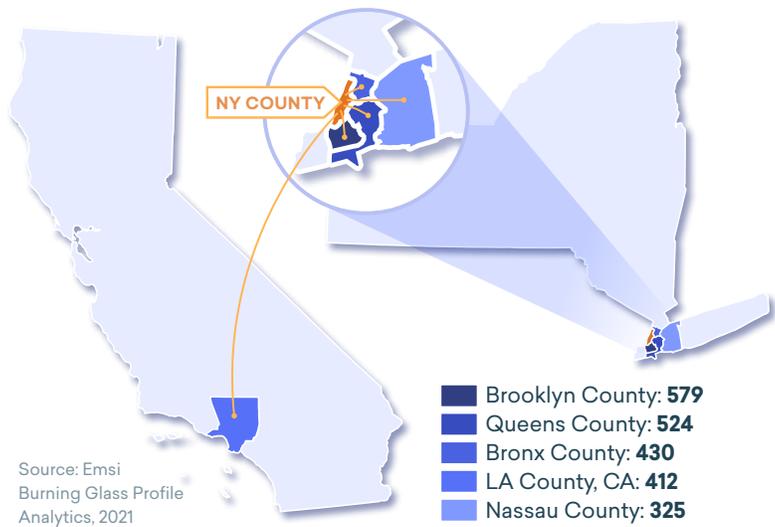
But it isn't all bad news for cities. The study also found that “While some big cities like [New York](#) and [Chicago](#) recently experienced population decline, the top 50 metros in aggregate have attracted greater shares of young adults and millennials over time. The share of late millennials (born 1991–2000), who were in primary and secondary school in earlier years, has risen in large metros in recent years as the oldest members began to enter college, enter the workforce, etc.” Essentially, young millennials (or “late millennials”) are replacing the old ones who have headed for the suburbs and exurbs.



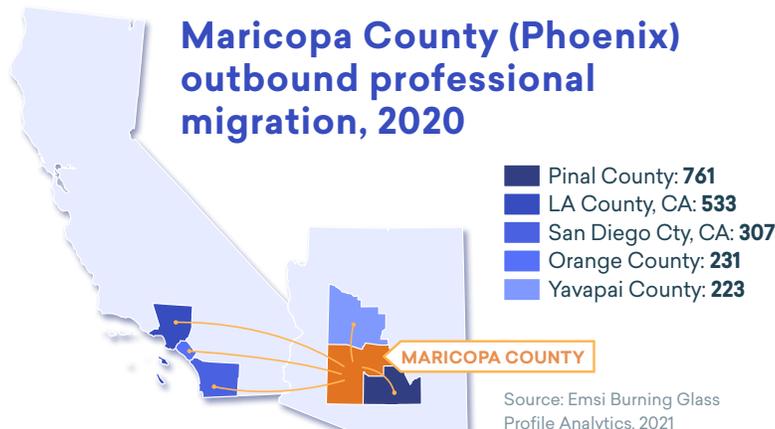
## Harris County (Houston) outbound professional migration, 2020



## New York County (Manhattan/NYC) outbound professional migration, 2020



## Maricopa County (Phoenix) outbound professional migration, 2020



# REGIONAL TRENDS

**IN YEARS PAST**, as with this year, it's hard not to notice state-specific success and regional trends. Texas consistently has multiple counties in the top 10 in each category and Florida now has 15 large counties in the top 40, up from 12 a year ago.

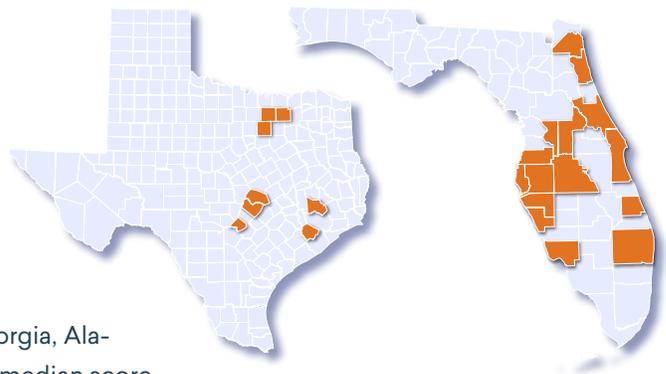
Regionally, the Northwest, including Idaho and Montana have high marks. The Mountain West is also a notable winner. Colorado, Utah, Arizona, Wyoming, and Nevada, and again Idaho and Montana, have a median index z-score<sup>2</sup> of 1.48 across all counties. The national median is -0.47.

The Southeast region is noteworthy as well. Tennessee, Georgia, Alabama, the Carolinas and the aforementioned Florida pull in a median score of 0.57. Large counties in the region have a median index score of 3.92 to go along with an average ranking of No. 175, well above the large county average of No. 302. Meanwhile, small counties in the Southeast produced an index score of 0.22. The national median for small counties is -0.61.

Conversely, the coastal counties of California are struggling. Los Angeles County ranks dead last and Orange County isn't far behind at No. 594. San Diego County at No. 579 and Ventura County at No. 520 complete a tough showing for Southern California. Northern California doesn't fare much better, especially the Bay Area: Santa Clara, Alameda, Contra Costa and San Mateo counties all rank worse than 500. San Francisco County came in at No. 451.

The Northeast has been seeing similar woes. A median index score of -2.09 puts the region well below the nation. While the large New York counties of Queens, Kings, Bronx, and New York provide a dragging anchor, a vast majority of the Northeast is below the nation. Maine provides a bit of a bright spot, with Androscoggin County at No. 18. The coastal Maine counties of Cumberland (Portland, Maine) and York County have made steady rises

**23 of the top 40 large counties are in Florida (15) and Texas (8) .**



## National vs. regional median index scores

Region	All size counties	Large counties	Small counties
US	-0.47	-0.10	-0.61
Southeast	0.57	3.92	0.22
Mountain	1.48	5.83	0.89
Northeast	-2.09	-2.77	-1.73
Northwest	1.2	3.46	0.63
Texas	0.36	3.56	-0.09
Florida	2.99	7.86	0.90

Source: Emsi Burning Glass Labor Market Analytics, 2021

<sup>2</sup> The Talent Attraction Scorecard uses six equally weighted metrics to create a z-score index. A z-score is a numerical measurement that describes a value's relationship to the mean of a group of values.

from the middle of the pack to the top third of the rankings. All Maine large counties have education attainment growth above 10%, and while their overall job growth and regional competitiveness is mixed, skilled occupations and total net returns are at healthy rates.

### Do politics move the talent needle?

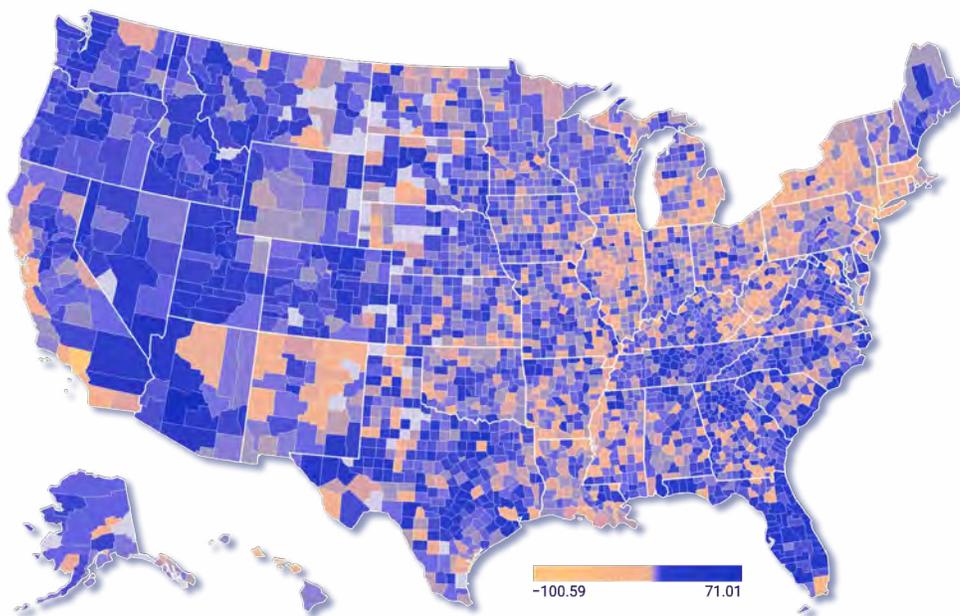
Data from the past 18 months shows that large numbers of individuals have made a change of address. And headlines are full of busi-

nesses announcing moves to states such as Texas and Florida (the Hoover Institution conducted an extensive analysis of company headquarters leaving California). The motivation for these moves varies widely and is difficult to quantify. When businesses move to a new location, perhaps for a more favorable regulatory and taxation climate, workers often follow. But the reverse can also be true; as people seek more space or affordability, it may be the businesses that follow to where the people are—especially at a time when labor is in short supply.

To what degree politics affects these shifts is unclear, but our large county rankings generally tend to align with the anecdotal narrative of migration from blue to red states (as determined by the party affiliation of the state’s governor<sup>3</sup>). Among large counties, the average rank of red state counties is No. 241, with a median index score of 1.66. Conversely, blue state large counties came in with an average rank of No. 368 and a median index score of -1.59.

However, the correlation between party affiliation and talent attraction is less pronounced amongst small counties. The red state median index for small counties is -0.46 with blue states just slightly lower, at -0.74.

## Talent attraction Z-score for all US counties



Source: Emsi Burning Glass Labor Market Analytics, 2021

### Talent attraction by county size and state party affiliation

Party of governor	County size	Average TAS rank	Median Z-score
Republican	Large	241	1.66
	Small	1065	-0.46
Democrat	Large	368	-1.59
	Small	1179	-0.74

Source: Emsi Burning Glass Labor Market Analytics, 2021

3 Various methods to assign a state as “red” or “blue” could be used: makeup of state legislature, party registration, etc. Governor party affiliation was chosen as it provided a relatively even split of red (27) and blue (23) states. It also produces an equal number Democrat-controlled state legislatures represented by Republican governors (4), and Republican controlled state legislatures represented by Democratic governors (4). Conversely, assigning based on control of state senates or state houses would have yielded differences of 32-18 and 29-19-1, respectively.

STRATEGIES TO START...

## MAKING LEMONADE



**THIS YEAR'S SCORECARD** demonstrates that a talent development strategy is first and foremost a people strategy. Earlier this year our [Demographic Drought](#) report highlighted that with persistently low birth rates, baby boomers retiring, and the male labor force participation rate continuing to fall, finding people to perform the tasks businesses require will only become harder.

The results of decades of low birth rates are here to stay. And since this problem isn't unique to the US—fertility rates are dropping around the world and countries that produce much of our inbound migration are moving closer to the same problem—immigration at best is a band-aid solution.

Thus, this really is a making lemonade out of lemons situation. Mitigating the impacts of a persistent labor shortage will be what separates successful communities from those that struggle. And much of the strategizing around talent development will require a mind shift: less about buying (communities attracting talent with amenities or businesses upping salaries to steal away talent) and more about building: valuing people more and investing in them every step of the way. With this in mind, here are strategies across various timeframes for building a talent pipeline.

## 0 to 6 months: Talent Search

This isn't to say talent attraction isn't a viable strategy in the short run. But over time communities seeking to attract talent will be fighting over a continually dwindling supply. But just like any investment strategy, it needs to be diversified. So attract away, just don't make it the sole effort of your talent strategy.

### Don't look too far

That data is pretty clear that movers aren't going too far. At least when leaving large metros. So if your community is adjacent to or near a major metro, probably your best bet for attracting talent is going to be from that metro. You'll have to ignore the stigma and narrative that suburbs or exurbs are uncool and embrace the one thing your community can't change: your location. The simple fact is suburbs are increasingly desirable to working-age adults.

### Reshuffle means a fresh deck

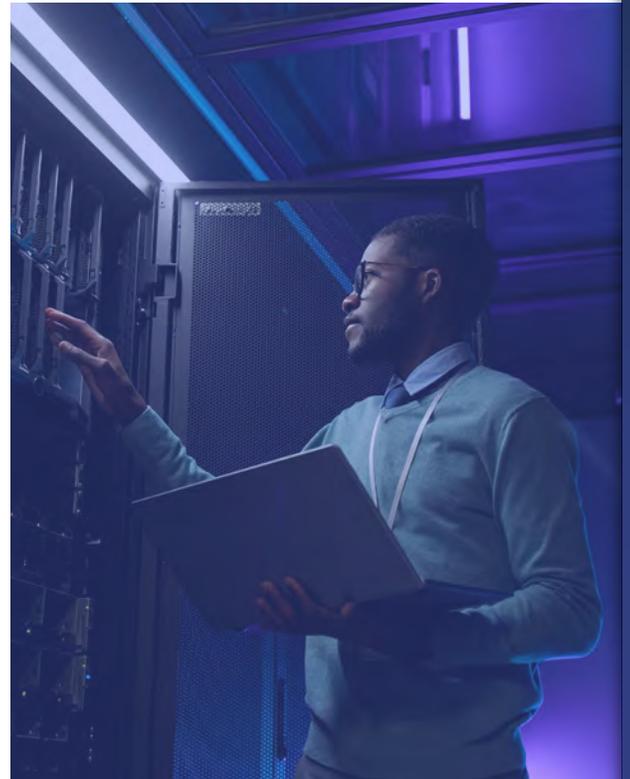
While moving outward from metros is common, the seismic shifts of the last 18 months have spurred many people into making bigger moves. From Gen-Z and millennials [considering a career change](#) to individuals and families making moves seeking a different way of life, this presents midsize and small markets with the opportunity to capture talent making moves in the reshuffle. It's thus a prime time to reimagine or establish your community's brand.

### Be yourself

Your community doesn't have to be all things to all talent. The influx of movers means there's a larger base of people that are attracted to what your community has to offer. Thus there isn't a need to try and be all things to all people, just be yourself (properly branded) and let talent decide if that's what they're after. Probably worth remembering that every community has quality of life strengths, they're just different. So best to share what makes your community unique (using data to back your claim).

## 6 months to 2 years: Microcredentials and Just-In-Time Programs

The recovery of our communities and economy will depend largely on how we respond to the changing needs in a post-COVID environment. In 2020 Emsi Burning Glass released [After the Storm](#) which examined five different economies that will shape the recovery: the readiness economy, the logistics economy, the green economy, the remote economy, and the automated economy. People and communities have spent the last year and a half adapting to reshaping economies and forms of work. And by some



estimates, 25% more workers [may need to switch jobs in the post-pandemic economy](#). The ability to quickly pivot in these sectors, and in some cases to them, will be vital.

### Take your cues from employers...and workers

To best understand the in-demand skills, stay in close contact with area executives and HR managers of your local businesses. [Job postings](#) data provides real-time info about employer intentions and their needs. It's also important to recognize changes in worker trends—people seeking hybrid home/office schedules and an organizational mission they align with—to name a few.

### Focus on skills and aligned transitions

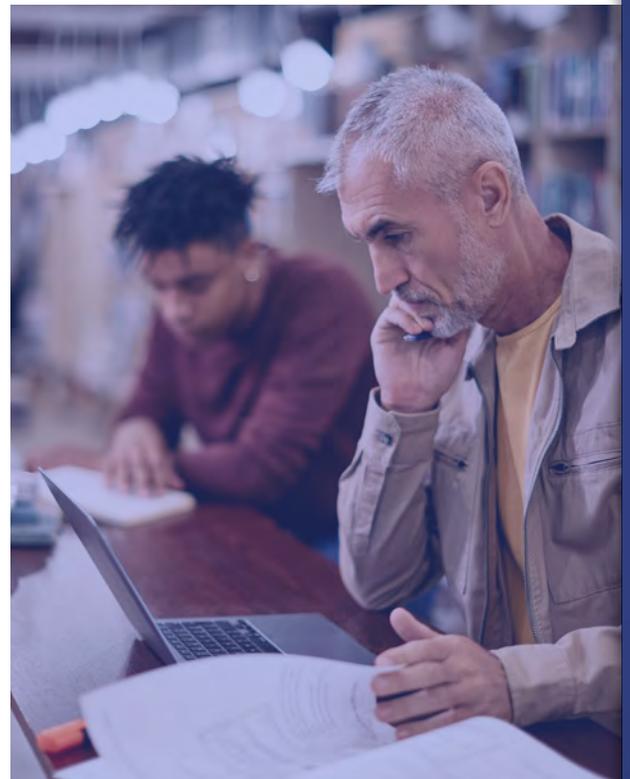
Skills are the [common language](#) used by people and employers in the marketplace. Using this language is a necessity when helping people change careers or advance in their current role. Increasingly, a combination of human and technical skills is required for today's jobs. As your community seeks to upskill talent for new market demands, identifying [aligned transitions](#)—when an individual deploys their existing skills in a different environment or new way—is the place to start. This need became acute when the pandemic forced large numbers of people to leave service and hospitality jobs. Visualizing a new career path deploying existing skills in new ways became a must for communities. [SkillFit](#) is an Emsi Burning Glass tool that enables jobseekers to do this by identifying their skills, find their best career options based on those skills, and uncover their fastest path to re-skilling and finding a great job.

### Transferable Skills & Responsive Programs

At this stage, the flexibility and adaptability of programs such as coding academies and business incubators are needed. Out of the Codefi co-working space in Cape Girardeau, MO, the six-month adult coding bootcamp [Code Labs](#) has emerged, which gives participants the necessary skills to get an entry-level job as a software developer. Working with businesses to implement region-specific, just-in-time programs will help you develop training responsive to local needs.

## 2 to 4 years: Technical and Certificate Programs

The big question 18 months ago was how to support those unemployed as a result of the pandemic. As of October 2021, there are more jobs (10.4 million) than unemployed people (7.7 million). This is no doubt due to an economy and job market that continues to evolve, resulting in demand for new/different skills as well as changing views of work. Similar to the reshuffling people are doing across the country, the economy is reshuffling. To respond effectively to these changes you need to focus on growing



your region's base of skilled workers with technical and certificate programs. In many ways, this stage is a slightly longer form of micro-credentials and just-in-time programs.

### Existing businesses first

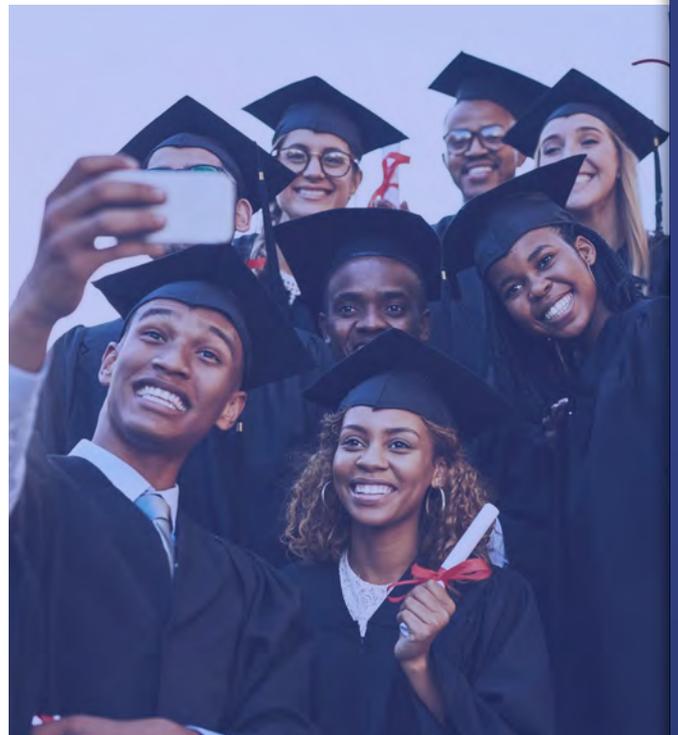
Just as it's important to understand the needs of businesses in finding talent right now, it's vital to understand the needs they see on the horizon. Your existing businesses know the technologies and trends of their industry, so they will be best to inform you of the technical skills which should be prioritized. While making the concerted effort to hear from businesses, this can also serve as an opportunity to re-examine local industries through the talent and skills lens. Industry cluster and gap identification based on talent (as opposed to merely the number of companies) will allow you to be more strategic in your BRE and recruitment programs.

### Partner with community colleges

Once you know the technical skill needs coming down the pike, your community college can develop or adapt necessary programs. This of course takes some time, but these programs are where your homegrown skilled workforce is developed. Whether your relationship with the community college system is new or longstanding, it may be worth considering establishing a formal partnership or joint initiative. Community colleges want their programs to be aligned with regional demand, and your efforts to facilitate a free-flowing conversation for them with local industry will help them greatly in doing this.

### Build resilient skills

Even before the pandemic, the importance of resilient skills was apparent. Their importance has now been underscored. Resilient skills are those that remain in demand, even increase in demand, during economic downturns. Communities that are made up of a resilient workforce are able to flourish in good times and bad. Strong human skills such as communication, problem-solving, and teamwork, coupled with a technical skill, create the versatile worker many employers are seeking. My Next Move, an initiative of the San Diego Workforce Partnership, helps connect the existing skills of jobseekers to priority jobs—those that are high growth and offer sustainable wages.



## 4 to 7 years: Higher Education

While you can certainly attract mid-career workers from elsewhere, the most efficient way to capture the demographic is by enabling them to build their careers in your community from the beginning. Local colleges and universities are the pipelines that

bring high-skill workers into your region—your goal is to prevent that pipeline from being diverted elsewhere. The first step to capturing the pipeline is understanding where it's going. Using [Profile Analytics](#), you can track alumni migration trends to understand how far or close local students tend to move. Once you understand the situation on the ground, you can take action to retain more graduates.

### Local careers

Whether it's the green economy or evolutions in healthcare, jobs are changing and will look different in each region. Perhaps the best way to understand your regional differences is through [skill clusters](#): a set of correlated skills that relate to a particular theme of work. Knowing the types of skills needed for careers in your area allows you to better advise colleges and universities on the skills they should be teaching, and advise students on the skills needed to get jobs in the area. This is a great way to put the “build don't buy” philosophy into action.

### Skills-based curriculum

Since skills have become what the president Western Governors University calls the “[currency](#)” of the future. It only makes sense that programs and curriculum would trade in this currency. By aligning its offerings to the skills-based needs of employers and the market, higher education can better equip their graduates for success. Economic and workforce development organizations can help make this skills-based connection between jobseekers, education, and industry. At Emsi Burning Glass we call this [skilling](#) curriculum. It makes local colleges and universities more marketable to students, and students more marketable to employers.

### Leverage data to track new trends

Did you know that since 2016 there's been a [66% increase in job postings that include salary information](#)? We recently took a dive into [career pathways data](#) to discover that waiters and waitresses have many of the skills needed to make a transition into public relations careers. These are the kinds of insights and trends that can be discovered with data. Demand for non-traditional certificates and coursework such as [Google Career Certificates](#) can be tracked in [Job Posting Analytics](#) to understand how employer taste is changing when it comes to qualifications.



## 7 to 10 years: preparing for a long-term future

To cultivate a healthy stream of talent you need to start early. Mitigating the worker shortage of the coming decades means doing lots of foundation building now. This will likely involve reshaping workforce development systems and figuring out how to support workers at scale. The fruits of these labors will take time to reap but are the necessary foundation for a resilient workforce over the long term.

### Introduce careers and opportunities early

The sooner students start thinking about opportunities in their community, the better. But often kids aren't aware of the types of careers that are out there or what an actual day in a particular job looks like. Practical work experiences and career exploration that helps students determine the right career path are needed. And not just for paths that lead to obtaining a college degree. The need for people skilled in the trades has long been recognized, but the people shortage is going to make this need even more pronounced. Ensuring students who are not college-bound are aware of apprenticeship programs like [CareerWise Colorado](#), technical certificates, and associate's degrees is vital.

### Keep students in the pipeline

An information gap often exists which keeps students from taking advantage of career guidance resources and programs. The result is students are less connected and struggle to remain on an educational path to a fulfilling career. COVID has likely exacerbated this problem, with fewer opportunities for students to learn about scholarships, grants, community college transfer programs, loans, and work-studies available. Whether through information campaigns or facilitating connections, economic and workforce development organizations play a crucial role in filling this information gap.

### Advocate for necessary investments

Be cognizant of the many hurdles and barriers facing your talent and push for community solutions. This may mean expanded bus services to get students and workers where they need to be. Or it could mean pushing for broadband in every neighborhood and across rural communities in your region. The creation of [Greenlight](#), the community-owned fiber network in Wilson, NC, has paved the way for [Gig East](#), the region's innovation hub. [Anne Arundel County](#) used data to identify barriers their ALICE population faced in filling the many job openings of local businesses. Often these infrastructure investments have the added bonus of making your region a more attractive place to live for relocating talent.

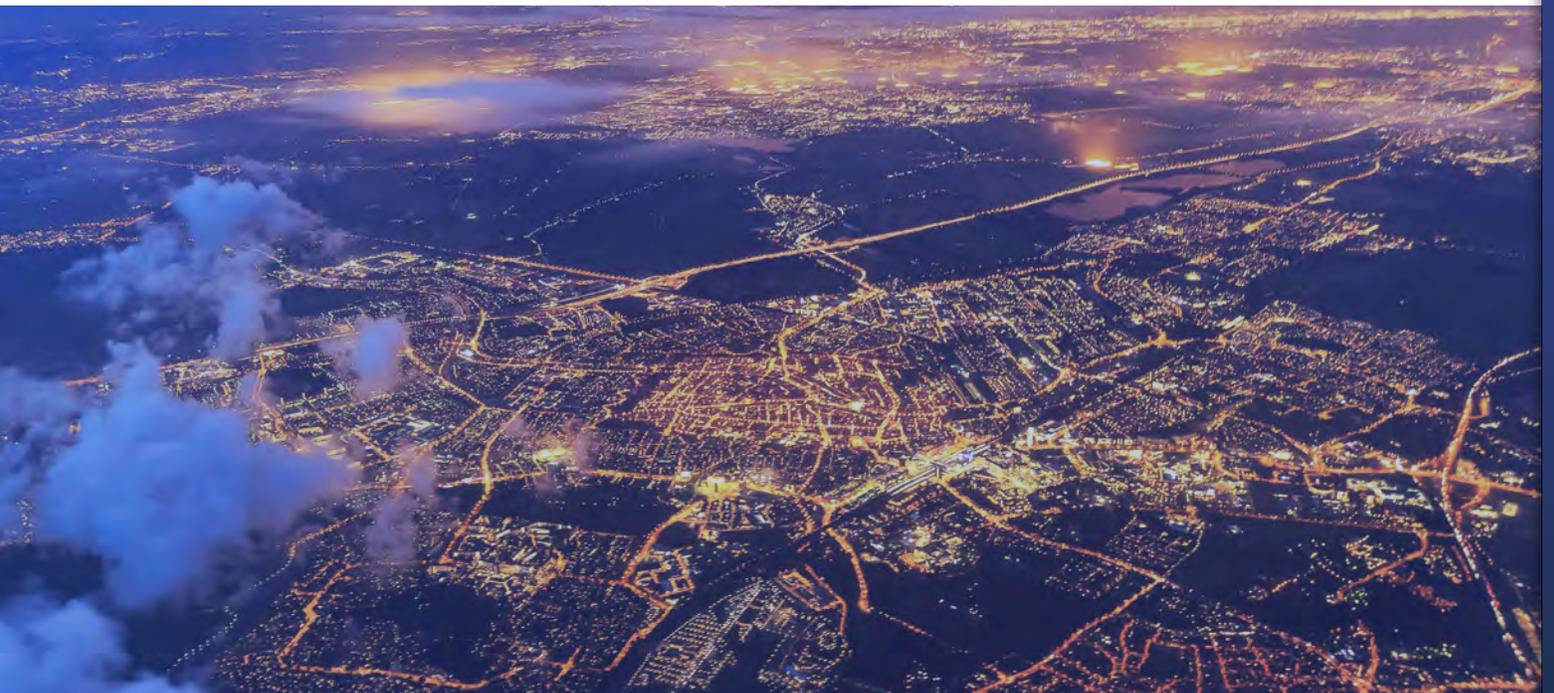


## Getting started and final thoughts

As with any project, the hardest step is often the first. Whether you don't have any strategies in place or you are looking to implement one final initiative, your talent attraction needs can only be solved by jumping in. A good place to start is by asking yourself this question: are our existing talent initiatives or those being considered aiming to buy talent or build it? Buying talent can accomplish short-term goals, but in the end, talent development is a long-run game. And like building anything sturdy and of worth, it will take time.

Be honest about the problems you're facing so that you can come up with real solutions. But at the same time, be the most enthusiastic cheerleader for your community's strengths. People and communities have been through the wringer the last few years and don't need naysayers. Prioritize the most urgent needs and the greatest potential impact and place your focus there. To keep the conversation on the essential, frame discussions in terms of skills and data wherever possible. Not only does it ensure that you won't be led astray by wishful thinking or bias as you develop your plan, but it's also the single best way to get key stakeholders on board with your vision.

Building a local talent base is not an easy task. But it offers incalculable benefits to the economy, to the strength and resilience of our communities, and to future generations of Americans.



## METHODOLOGY

The following six metrics were equally weighted to create a z-score index. Based on population, counties were broken into categories of large (100,000+), small (5,000–99,999), and micro (less than 4,999) and were then ranked based on their z-score.

**Net migration** uses IRS data collected between 2015 and 2019 to measure the net new residents that came to a county from inside or outside its state.

**Overall job growth** is the 2016–2020 percent job change for all wage-and-salary employees.

**Skilled job growth** looks at 2016–2020 percent growth for occupations that fall into one or more of the following three categories: those that typically require 1) a postsecondary certificate or above, 2) long-term on-the-job training, an apprenticeship, or residency/internship, or 3) five years or more of work experience in a related occupation. This allows us to see growth of jobs in occupations that require formal education (from a certificate to an advanced degree) and those in which experience or on-the-job training is preferred by employers. All education levels are reported at the national level by the BLS.

**Educational attainment** is the 2016–2020 percent change for adults over 25 with at least an associate degree.

**Regional competitiveness** is the 2016–2020 competitive effect for skilled occupations (see above) using shift share. Competitive effect explains how much of job change is due to a region's unique competitive advantages. This explains which counties are gaining (or losing) a greater share of skilled labor.

**Annual openings per capita** are the sum of 2016–2020 new jobs and replacement jobs (i.e., openings due to attrition) per 1,000 residents. Some regions might not create a flood of new jobs, but because of the attrition of its workforce through retirements, etc., replacement job needs could be high.

*All data (except net migration) is from Emsi Burning Glass's 2021.3 data set for wage-and-salary employees.*

