

VERMONT COMPREHENSIVE ECONOMIC DEVELOPMENT STRATEGY

# APPENDIX B

## ECONOMIC DATA ANALYSIS

# Vermont Comprehensive Economic Development Strategy

*Economic Data Analysis*

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## EXECUTIVE SUMMARY

As part of the Vermont Statewide Comprehensive Economic Development Strategy, one of the primary steps was to gather and analyze data related to historic and current economic trends. This document is intended to provide background data on the Vermont economy and compare Vermont to the New England Region and the United States. This is one set of data that will be used to develop specific strategies for the Vermont state economy. The following is a summary of the major findings of the analysis with more detail in the full report.

### *Demographics*

- Vermont's population is holding steady with only a 1% projected increase between 2013 and 2017. This growth is slightly slower than the United States growth of 3% but on par with the rest of New England.
- Median age in Vermont is higher than the other geographies and projected to continue to get older. Vermont has one of the oldest populations in the U.S.A.
- Median household income in Vermont (\$50,435) is very close to the rest of the United States (\$50,157) but lower than New England (\$58,980).
- Average household income in Vermont (\$64,262) is significantly lower than New England (\$80,575) and slightly lower than the average for the U.S. (\$68,162).
- 33% of Vermont's population has at least a Bachelor's degree compared to 35% and 28% in New England and the U.S., respectively.

### *Industry*

- The largest employer at the 2-digit NAICS level in Vermont and the USA is Government, and the largest employer in New England is Health Care and Social Assistance (with Government as a close second).
- Full Service Restaurants are a major employer in Vermont but they have one of the lowest average earnings figures.
- The Health Care and Social Assistance industry has grown over the last ten years at a quick rate in all three geographies (Vermont, New England, and U.S.); so have Educational Services and Professional, Scientific, and Technical Services (2-digit NAICS level).
- Service industries continue to be drivers of the Vermont economy including Full Service Restaurants, Drug Stores, Sporting Goods Stores, and Health Care Services all adding jobs over the next 10 years.
- Consulting firms and professional service providers are adding jobs in the New England region, including Computer System Design and Related Services, Management Consulting Services, Portfolio Management, and Engineering Services.
- Sixteen of the top twenty-five most concentrated industries in Vermont are manufacturing/production related, including Breweries, Logging, Ice Cream and Frozen Dessert Manufacturing, Coffee and Tea Manufacturing.

### *Occupation*

- The top occupations in Vermont are fairly low paying, with Registered Nurses being the highest paid of the top 10 largest occupations at just under \$63,300 per year.
- Social and Human Services make up a large portion of the growing occupations including Personal Care Aids, Registered Nurses, Social and Human Service Assistants, Teacher Assistants, etc. Personal Care Aides are expected to see the largest increases with over 3,500 jobs added by 2023 in Vermont.

## I. BACKGROUND

### Demographic & Socioeconomic Information

According to the recently released population estimate by the U.S. Census Bureau, Vermont's population is nearly 633,000<sup>1</sup>. The Census Bureau projects the State's population to reach 637,056 by 2017 (a 1% increase). There are approximately 258,000 households and 160,000 families in the State. The median age in Vermont is nearly 42 and is projected to rise through 2017. As demonstrated in the table below, New England as a region has a population that is much older than the rest of the United States and Vermont's population is even older than that. The State of Maine has an older population (42.7) but Windham County in Southeastern VT has an even older average population of nearly 45 years old (Census 2010 Demographic Profile). All of this impacts the needs, demands, and opportunities for the State's economic development future.

Compared to New England and the nation as a whole, Vermont's population, number of families, and number of households are all expected to grow over the short term at a similar rate.

Demographic Indicators				
Vermont	2012	2017	Change	% Change
Population	632,877	637,056	4,179	1%
Households	257,877	262,861	4,984	2%
Families	160,371	161,432	1,061	1%
Median Age	41.9	42.6	0.7	2%
New England	2012	2017	Change	% Change
Population	14,539,344	14,734,258	194,914	1%
Households	5,691,195	5,797,343	106,148	2%
Families	3,629,808	3,673,965	44,157	1%
Median Age	40.3	40.6	0.3	1%
United States	2012	2017	Change	% Change
Population	313,129,017	323,986,227	10,857,210	3%
Households	118,208,713	122,665,498	4,456,785	4%
Families	77,957,858	80,816,843	2,858,985	4%
Median Age	37.3	37.8	0.5	1%

Source: ESRI, Camoin Associates

The median household income in Vermont is \$50,435.<sup>2</sup> The average household income<sup>3</sup> is over \$64,000 and per capita income is estimated at nearly \$27,000. By 2017, the median household income in the State is expected to increase by about 14% and reach approximately \$57,628. Both average household income and per capita income are expected to increase by 12% and 14% respectively by 2017.

<sup>1</sup> Camoin Associates subscribes to ESRI Business Analyst Online for demographic, economic, social, and spending pattern information and trending. ESRI's base data is the 2000 and 2010 Census. It uses proprietary statistical models and updated data from the U.S. Census Bureau, the U.S. Postal Service, and various other sources to project current statistics and future trends. ESRI data is often used for economic development, marketing, site selection, and strategic decision making. For more information, visit [www.esri.com](http://www.esri.com).

<sup>2</sup> Median HH Income: Value of the midpoint of the distribution of household income in the region.

<sup>3</sup> Average HH Income: Obtained by adding all household incomes and dividing by the number of households.

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The median household income in Vermont is \$8,500 less than that of the rest of New England but slightly higher than the rest of the United States. Median household income in New England is expected to increase by 18% by 2017, which is quicker than Vermont is expected to grow.

Socioeconomic Indicators				
Vermont	2012	2017	Change	% Change
Median Household Income	\$50,435	\$57,628	\$7,193	14%
Average Household	\$64,262	\$72,276	\$8,014	12%
Per Capita Income	\$26,909	\$30,566	\$3,657	14%
New England	2012	2017	Change	% Change
Median Household Income	\$58,980	\$69,434	\$10,454	18%
Average Household	\$80,575	\$91,699	\$11,124	14%
Per Capita Income	\$32,365	\$36,922	\$4,557	14%
United States	2012	2017	Change	% Change
Median Household Income	\$50,157	\$56,895	\$6,738	13%
Average Household	\$68,162	\$77,137	\$8,975	13%
Per Capita Income	\$26,409	\$29,882	\$3,473	13%

Source: ESRI, Camoin Associates

## Educational Attainment

The levels of educational attainment in Vermont, New England and the United States are shown in the table below. 33% of Vermont’s population has at least a Bachelor’s degree, compared to 35% and 28% in New England and U.S., respectively. 90% of Vermont’s population has at least a high school diploma compared to 88% throughout New England and 85% for the rest of the United States.

Educational Attainment of Population Age 25+			
Vermont	Vermont	2012	% of Population
	No schooling completed	1,602	0%
	Less Than 9th grade	13,303	3%
	9th grade -12th grade, no diploma	26,672	6%
	High school graduate, GED, or alternative	136,046	32%
	Some college, less than 1 year	21,477	5%
	Some college, 1 or more years, no degree	47,887	11%
	Associate's degree	35,485	8%
	Bachelor's degree	84,803	20%
	Master's degree	37,829	9%
	Professional school degree	9,289	2%
	Doctorate degree	6,703	2%
New England	New England	2012	% of Population
	No schooling completed	87,550	1%
	Less Than 9th grade	367,965	4%
	9th grade -12th grade, no diploma	677,073	7%
	High school graduate, GED, or alternative	2,810,568	29%
	Some college, less than 1 year	516,159	5%
	Some college, 1 or more years, no degree	1,113,876	11%
	Associate's degree	760,001	8%
	Bachelor's degree	1,980,893	20%
	Master's degree	982,887	10%
	Professional school degree	240,995	2%
	Doctorate degree	164,934	2%
United States	United States	2012	% of Population
	No schooling completed	2,115,918	1%
	Less Than 9th grade	10,434,275	5%
	9th grade -12th grade, no diploma	17,894,984	9%
	High school graduate, GED, or alternative	57,861,698	29%
	Some college, less than 1 year	12,469,567	6%
	Some college, 1 or more years, no degree	27,635,716	14%
	Associate's degree	14,663,437	7%
	Bachelor's degree	34,384,717	17%
	Master's degree	13,900,234	7%
	Professional school degree	3,850,948	2%
	Doctorate degree	2,229,278	1%

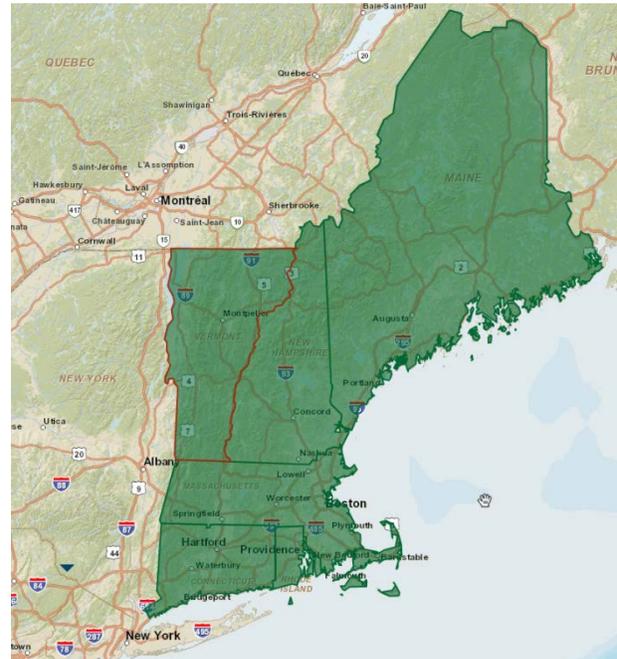
Source: ESRI, Camoin Associates

## II. ECONOMIC DATA ANALYSIS

This analysis of the economic makeup of the State uses industry data organized according to the North American Industrial Classification System (NAICS). Camoin Associates subscribes to Economic Modeling Specialists Intl. (EMSI), a proprietary data provider which aggregates economic data from approximately 90 sources. EMSI industry data, in our experience, is more complete than most or perhaps all local data sources (for more information on EMSI, please see [www.economicmodeling.com](http://www.economicmodeling.com)). This is because local data sources typically miss significant employment counts by industry because data on sole proprietorships and contractual employment (i.e. 1099 contractor positions) is not included and because certain employment counts are suppressed from BLS/BEA figures for confidentiality reasons when too few establishments exist within a single NAICS code.



NAICS codes are maintained by the U.S. Census Bureau and are the standard used by Federal statistical agencies in classifying business establishments. 2-digit codes are the highest aggregate NAICS code level and represent broad categories such as “retail”, whereas 4-digit industry codes present a finer level of detail such as “grocery stores”. For those interested in understanding the composition of the NAICS and for more detail about what is included in each industry, we direct the reader to <http://www.census.gov/eos/www/naics/>.



New England Region

This *Economic Analysis* organizes data in several ways: Largest Industries, Fastest Growing Industries (2003-2013 and 2013-2023), and Concentrated Industries. This section first presents all industries in the State of Vermont at the 2-digit level to get an overview of how the State is performing as a whole. This is followed by a detailed analysis of the top 25 performing industries at the 5-digit NAICS code level to assess the degree to which the State’s economy aligns with the regional and national economy.

### Industry Analysis

#### Largest Industries

By looking at industry employment data for 2-digit and 5-digit industry sectors, the relative size of each industry is determined. In the following tables, each industry is ranked from largest to smallest by the number of jobs in 2013. This data is used to identify the largest industries and industry sectors, based on the number of jobs in that sector. It is also used to evaluate the distribution of employment by industry.

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We note the following from this data:

- The largest employer at the 2-digit NAICS level in Vermont and the USA is Government and the largest employer in New England is Health Care and Social Assistance (with Government as a close second).
- Full Service Restaurants are a major employer in Vermont but they have one of the lowest average earnings figures.
- There is a noticeable lack in professional services in Vermont such as lawyers, professional and technical consultants, etc.
- Education (Public Schools) is the largest employer in Vermont by far, almost double the employment compared to the second largest employer (General Surgical and Medical Hospitals).
- Semiconductor and Other Electronic Component Manufacturing is the largest manufacturing related industry in Vermont and the only manufacturing industry listed in the top 25 for employment.
- Health care related industries such as Nursing Care, Offices of Physicians, and Home Health Care Services, are large employers in the New England area.
- Computer Systems Design and Related Services shows up in all three of the geographies as a top 25 employer with some of the highest average earnings.

### Industry Size (2-digit NAICS)

To understand the Vermont economy we first need to understand what industries account for the most employment. The table below shows employment at the 2-digit NAICS code level for Vermont, New England, and the United States.

Industry Size

Largest Industries - 2013 Jobs (2-digit NAICS)							
NAICS	Description	Vermont		New England		United States	
		#	%	#	%	#	%
11	Agriculture, Forestry, Fishing and Hunting	6,327	2%	45,657	1%	1,867,549	1%
21	Mining, Quarrying, and Oil and Gas Extraction	663	0%	3,217	0%	828,450	1%
22	Utilities	1,835	1%	22,993	0%	552,252	0%
23	Construction	22,233	6%	388,078	5%	7,912,483	5%
31	Manufacturing	32,727	9%	611,216	8%	12,180,034	8%
42	Wholesale Trade	10,613	3%	263,772	3%	5,903,923	4%
44	Retail Trade	41,083	12%	827,507	11%	15,758,825	10%
48	Transportation and Warehousing	7,390	2%	175,034	2%	4,856,313	3%
51	Information	5,014	1%	162,535	2%	2,827,848	2%
52	Finance and Insurance	9,772	3%	385,999	5%	6,159,550	4%
53	Real Estate and Rental and Leasing	4,528	1%	109,097	1%	2,494,135	2%
54	Professional, Scientific, and Technical Services	18,080	5%	542,729	7%	9,439,912	6%
55	Management of Companies and Enterprises	1,829	1%	124,375	2%	2,036,409	1%
56	Admin and Support and Waste Management and Remediation Services	12,839	4%	395,089	5%	9,232,209	6%
61	Educational Services (Private)	16,327	5%	367,576	5%	3,771,908	3%
62	Health Care and Social Assistance	53,493	15%	1,160,893	15%	18,169,595	12%
71	Arts, Entertainment, and Recreation	5,709	2%	130,508	2%	2,453,951	2%
72	Accommodation and Food Services	31,350	9%	598,601	8%	12,300,007	8%
81	Other Services (except Public Administration)	16,040	4%	396,370	5%	7,686,984	5%
90	Government	58,775	16%	1,034,107	13%	24,041,336	16%
99	Unclassified Industry	15	0%	623	0%	171,970	0%
Total		356,643	100%	7,745,976	100%	150,645,641	100%

Source: QCEW Employees, Non-QCEW Employees & Self-Employed - EMSI 2013.3 Class of Worker

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### Industry Size (5-digit NAICS)

The tables on the following pages show the top twenty-five industries in terms of employment in Vermont, New England, and the United States.

## Vermont - Top Industries

State of Vermont Top 25 Largest Industries - 2013 Jobs (5-digit NAICS)					
NAICS	Description	2013 Jobs	% of Total	2013 Earnings	Establishments
90361	Education (Local Government)	21,955	6%	\$50,413	276
62211	General Medical and Surgical Hospitals (Private)	12,662	4%	\$69,097	17
72111	Hotels (except Casino Hotels) and Motels	10,996	3%	\$27,126	239
72211	Full-Service Restaurants	10,570	3%	\$19,754	683
61131	Colleges, Universities, and Professional Schools (Private)	10,055	3%	\$33,923	32
90299	State Government, Excluding Education and Hospitals	9,303	3%	\$65,844	299
90399	Local Government, Excluding Education and Hospitals	8,274	2%	\$47,887	559
62412	Services for the Elderly and Persons with Disabilities	8,233	2%	\$15,769	73
44511	Supermarkets and Other Grocery (except Convenience) Stores	8,136	2%	\$25,376	223
90261	Education (State Government)	7,913	2%	\$51,213	30
72221	Limited-Service Eating Places	5,587	2%	\$17,855	463
62111	Offices of Physicians	5,055	1%	\$100,118	363
23611	Residential Building Construction	5,007	1%	\$35,775	793
90119	Federal Government, Civilian, Excluding Postal Service	4,992	1%	\$109,381	172
33441	Semiconductor and Other Electronic Component Manufacturing	4,917	1%	\$96,906	16
90120	Federal Government, Military	4,364	1%	\$25,975	0
54151	Computer Systems Design and Related Services	3,918	1%	\$90,354	566
62311	Nursing Care Facilities	3,890	1%	\$37,078	58
62441	Child Day Care Services	3,821	1%	\$18,614	256
62142	Outpatient Mental Health and Substance Abuse Centers	3,606	1%	\$38,972	43
61111	Elementary and Secondary Schools (Private)	3,606	1%	\$40,789	80
44711	Gasoline Stations with Convenience Stores	3,541	1%	\$20,976	389
11200	Animal Production	3,134	1%	\$29,431	181
23891	Site Preparation Contractors	2,976	1%	\$37,731	327
44111	New Car Dealers	2,937	1%	\$54,620	89

Source: EMSI, Camoin Associates

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New England - Top Industries

New England Top 25 Largest Industries - 2013 Jobs (5-digit NAICS)					
NAICS	Description	2013 Jobs	% of Total	2013 Earnings	Establishments
90361	Education (Local Government)	365,876	5%	\$65,242	2,277
62211	General Medical and Surgical Hospitals (Private)	307,000	4%	\$76,990	287
72211	Full-Service Restaurants	263,259	3%	\$21,976	13,337
61131	Colleges, Universities, and Professional Schools (Private)	233,251	3%	\$53,871	514
90399	Local Government, Excluding Education and Hospitals	216,164	3%	\$65,418	8,195
72221	Limited-Service Eating Places	191,003	2%	\$17,245	14,856
44511	Supermarkets and Other Grocery (except Convenience) Stores	168,078	2%	\$26,785	2,796
90299	State Government, Excluding Education and Hospitals	156,793	2%	\$78,544	3,463
62311	Nursing Care Facilities	128,104	2%	\$42,440	1,118
62111	Offices of Physicians	126,260	2%	\$110,566	8,800
55111	Management of Companies and Enterprises	124,375	2%	\$143,603	3,400
54151	Computer Systems Design and Related Services	121,985	2%	\$127,278	14,682
90261	Education (State Government)	120,170	2%	\$50,133	211
56132	Temporary Help Services	112,151	1%	\$39,818	4,014
81411	Private Households	85,480	1%	\$16,141	39,079
45211	Department Stores	82,254	1%	\$25,190	785
72111	Hotels (except Casino Hotels) and Motels	74,115	1%	\$32,281	2,366
61111	Elementary and Secondary Schools (Private)	72,332	1%	\$47,212	924
62161	Home Health Care Services	70,605	1%	\$41,345	1,108
62441	Child Day Care Services	70,596	1%	\$23,087	4,435
52411	Direct Life, Health, and Medical Insurance Carriers	70,231	1%	\$119,939	566
56172	Janitorial Services	69,818	1%	\$24,384	3,568
54111	Offices of Lawyers	69,151	1%	\$92,408	9,751
54161	Management Consulting Services	69,147	1%	\$106,248	9,171
90119	Federal Government, Civilian, Excluding Postal Service	68,228	1%	\$117,751	1,445

Source: EMSI, Camoin Associates

United States - Top Industries

United States Top 25 Largest Industries - 2013 Jobs (5-digit NAICS)					
NAICS	Description	2013 Jobs	% of Total	2013 Earnings	Establishments
90361	Education (Local Government)	7,766,430	5%	\$54,743	63,256
90399	Local Government, Excluding Education and Hospitals	5,497,087	4%	\$62,815	100,339
72211	Full-Service Restaurants	4,891,067	3%	\$20,548	227,638
72221	Limited-Service Eating Places	4,471,727	3%	\$16,254	271,425
62211	General Medical and Surgical Hospitals (Private)	4,454,021	3%	\$68,107	6,116
56132	Temporary Help Services	2,661,165	2%	\$33,297	49,809
90261	Education (State Government)	2,564,910	2%	\$52,695	7,564
62111	Offices of Physicians	2,507,418	2%	\$98,568	217,676
44511	Supermarkets and Other Grocery (except Convenience) Stores	2,417,415	2%	\$28,066	60,961
90119	Federal Government, Civilian, Excluding Postal Service	2,307,030	2%	\$115,605	33,030
90299	State Government, Excluding Education and Hospitals	2,261,433	2%	\$66,799	57,986
90120	Federal Government, Military	2,074,143	1%	\$48,661	0
55111	Management of Companies and Enterprises	2,036,409	1%	\$128,455	56,378
61131	Colleges, Universities, and Professional Schools (Private)	1,864,587	1%	\$48,421	6,820
54151	Computer Systems Design and Related Services	1,864,275	1%	\$113,428	212,153
81311	Religious Organizations	1,676,625	1%	\$19,879	22,115
62311	Nursing Care Facilities	1,660,009	1%	\$36,476	16,976
45211	Department Stores	1,495,121	1%	\$25,680	14,331
72111	Hotels (except Casino Hotels) and Motels	1,483,173	1%	\$30,361	51,957
62161	Home Health Care Services	1,346,303	1%	\$32,626	29,929
81411	Private Households	1,312,269	1%	\$12,911	731,089
52211	Commercial Banking	1,307,479	1%	\$77,017	80,249
45291	Warehouse Clubs and Supercenters	1,265,719	1%	\$30,535	5,011
54111	Offices of Lawyers	1,259,118	1%	\$96,340	174,660
56172	Janitorial Services	1,226,010	1%	\$21,802	62,579

Source: EMSI, Camoin Associates

**Industry Growth 2003-2013 and 2013-2023**

Looking at past changes in employment by industry helps to identify which industries have experienced rapid growth/decline. This information can be used to detect industries that might be struggling or, on the other hand, those that are thriving. To identify the fastest growing industries, the historic change in employment is presented by the number of jobs lost or gained and the percent change within each industry over the last ten years (2003-2013). These data can be one set of information to help community leaders make decisions about how and where to direct economic development support.

Key findings from the fastest growing industry data analysis are as follows:

- The Health Care and Social Assistance industry has grown over the last ten years at a quick rate in all three geographies; so have Educational Services and Professional, Scientific, and Technical Services (2-digit NAICS level).
- Over the last ten years, Vermont added 8,645 new jobs (2% increase), New England added 161,264 new jobs (2% increase), and the United States added 6.4 million new jobs (4% increase). Note that this includes the Great Recession and is therefore a unique time in US economic history.

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- The Health Care and Social Assistance industry grew by nearly 10,000 employees over the last ten years in Vermont, by far the fastest growing in terms of total number of new jobs.
- The Management of Companies and Enterprises industry added just over 1,500 in Vermont which was a significant percent increase (549% increase over 10 years).
- All three geographies saw a decrease in Information, Manufacturing, Construction, Finance and Insurance.
- Services for the Elderly and Persons with Disabilities saw the largest increase in jobs between 2003 and 2013 (over 5,000 jobs added).
- Coffee and Tea Manufacturing saw the largest percent increase and added 1,331 new jobs in Vermont.
- New England saw the largest total job increase in General Medical and Surgical Hospitals, adding 45,500 new jobs since 2003, a 17% increase.

### Historic Growth 2003-2013 (2-digit NAICS)

## Historic Growth

Historic Growth 2003-2013 (2-digit NAICS)							
NAICS Code	Description	Vermont		New England		United States	
		# Change	% Change	# Change	% Change	# Change	% Change
11	Agriculture, Forestry, Fishing and Hunting	531	9%	-276	-1%	-51,534	-3%
21	Mining, Quarrying, and Oil and Gas Extraction	-126	-16%	-937	-23%	314,429	61%
22	Utilities	107	6%	-4,157	-15%	-23,625	-4%
23	Construction	-3,088	-12%	-40,254	-9%	-888,411	-10%
31	Manufacturing	-6,347	-16%	-171,414	-22%	-2,565,154	-17%
42	Wholesale Trade	64	1%	-19,214	-7%	118,827	2%
44	Retail Trade	-119	0%	-31,232	-4%	38,501	0%
48	Transportation and Warehousing	-484	-6%	3,989	2%	324,820	7%
51	Information	-1,825	-27%	-17,789	-10%	-498,087	-15%
52	Finance and Insurance	-957	-9%	-26,381	-6%	-68,788	-1%
53	Real Estate and Rental and Leasing	-58	-1%	-9,469	-8%	-95,979	-4%
54	Professional, Scientific, and Technical Services	1,915	12%	73,161	16%	1,551,381	20%
55	Management of Companies and Enterprises	1,547	549%	11,794	10%	376,272	23%
56	Admin and Support and Waste Management and Remediation Services	1,447	13%	38,553	11%	860,591	10%
61	Educational Services (Private)	1,823	13%	47,642	15%	762,084	25%
62	Health Care and Social Assistance	9,779	22%	187,944	19%	3,386,599	23%
71	Arts, Entertainment, and Recreation	-148	-3%	5,651	5%	263,098	12%
72	Accommodation and Food Services	1,817	6%	72,709	14%	1,730,644	16%
81	Other Services (except Public Administration)	266	2%	40,322	11%	520,729	7%
90	Government	2,485	4%	2,664	0%	380,610	2%
99	Unclassified Industry			-2,043	-77%	-35,769	-17%
<b>Total</b>		<b>8,629</b>	<b>2%</b>	<b>161,264</b>	<b>2%</b>	<b>6,401,237</b>	<b>4%</b>

Source: QCEW Employees, Non-QCEW Employees & Self-Employed - EMSI 2013.3 Class of Worker, Camoin Associates

## State of Vermont Comprehensive Economic Development Strategy

### Historic Growth 2003-2013 (5-digit NAICS)

Looking closer into the three geographies, the following tables identify the top 25 fastest growing industries at the 5-digit NAICS code level.

## Vermont - Historic Growth

Vermont Historic Growth 2003-2013 (5-digit NAICS)					
NAICS	Description	2003 Jobs	2013 Jobs	Change	% Change
62412	Services for the Elderly and Persons with Disabilities	2,917	8,233	5,316	182%
61131	Colleges, Universities, and Professional Schools (Private)	7,061	10,055	2,994	42%
62211	General Medical and Surgical Hospitals (Private)	9,763	12,662	2,899	30%
55111	Management of Companies and Enterprises	282	1,829	1,547	549%
54151	Computer Systems Design and Related Services	2,463	3,918	1,455	59%
31192	Coffee and Tea Manufacturing	88	1,419	1,331	1513%
90361	Education (Local Government)	20,686	21,955	1,269	6%
72111	Hotels (except Casino Hotels) and Motels	10,050	10,996	946	9%
54161	Management Consulting Services	1,431	2,370	939	66%
90119	Federal Government, Civilian, Excluding Postal Service	4,073	4,992	919	23%
62331	Community Care Facilities for the Elderly	1,300	2,218	918	71%
52212	Savings Institutions	772	1,549	777	101%
56132	Temporary Help Services	1,782	2,556	774	43%
56111	Office Administrative Services	133	864	731	550%
90399	Local Government, Excluding Education and Hospitals	7,554	8,274	720	10%
72211	Full-Service Restaurants	9,852	10,570	718	7%
33451	Navigational, Measuring, Electromedical, and Control Instruments Manufacturing	1,115	1,803	688	62%
62142	Outpatient Mental Health and Substance Abuse Centers	2,983	3,606	623	21%
49311	General Warehousing and Storage	417	1,038	621	149%
56149	Other Business Support Services	155	697	542	350%
32619	Other Plastics Product Manufacturing	420	932	512	122%
42512	Wholesale Trade Agents and Brokers	162	636	474	293%
81111	Automotive Mechanical and Electrical Repair and Maintenance	1,696	2,166	470	28%
44511	Supermarkets and Other Grocery (except Convenience) Stores	7,680	8,136	456	6%
32541	Pharmaceutical and Medicine Manufacturing	33	482	449	1361%

Source: QCEW Employees, Non-QCEW Employees & Self-Employed - EMSI 2013.3 Class of Worker

State of Vermont Comprehensive Economic Development Strategy

New England - Historic Growth

New England Historic Growth 2003-2013 (5-digit NAICS)					
NAICS	Description	2003 Jobs	2013 Jobs	Change	% Change
62211	General Medical and Surgical Hospitals (Private)	261,406	307,000	45,594	17%
72211	Full-Service Restaurants	224,874	263,259	38,385	17%
54151	Computer Systems Design and Related Services	85,243	121,985	36,742	43%
81411	Private Households	51,636	85,480	33,844	66%
72221	Limited-Service Eating Places	158,547	191,003	32,456	20%
62412	Services for the Elderly and Persons with Disabilities	25,375	54,835	29,460	116%
61131	Colleges, Universities, and Professional Schools (Private)	206,186	233,251	27,065	13%
62161	Home Health Care Services	45,897	70,605	24,708	54%
56132	Temporary Help Services	90,600	112,151	21,551	24%
90261	Education (State Government)	100,420	120,170	19,750	20%
44511	Supermarkets and Other Grocery (except Convenience) Stores	150,235	168,078	17,843	12%
54171	Research and Development in the Physical, Engineering, and Life Sciences	40,440	57,967	17,527	43%
54161	Management Consulting Services	53,208	69,147	15,939	30%
62111	Offices of Physicians	112,869	126,260	13,391	12%
42512	Wholesale Trade Agents and Brokers	44,620	57,717	13,097	29%
62331	Community Care Facilities for the Elderly	28,289	41,293	13,004	46%
55111	Management of Companies and Enterprises	112,581	124,375	11,794	10%
52392	Portfolio Management	15,437	26,749	11,312	73%
56173	Landscaping Services	48,789	58,008	9,219	19%
45211	Department Stores	75,007	82,254	7,247	10%
51121	Software Publishers	25,808	33,026	7,218	28%
81211	Hair, Nail, and Skin Care Services	49,888	56,914	7,026	14%
53131	Real Estate Property Managers	21,154	28,128	6,974	33%
62231	Specialty (except Psychiatric and Substance Abuse) Hospitals (Private)	21,400	28,339	6,939	32%
62321	Residential Mental Retardation Facilities	24,053	30,789	6,736	28%

Source: QCEW Employees, Non-QCEW Employees & Self-Employed - EMSI 2013.3 Class of Worker

United States - Historic Growth

United States Historic Growth 2003-2013 (5-digit NAICS)					
NAICS	Description	2003 Jobs	2013 Jobs	Change	% Change
72221	Limited-Service Eating Places	3,657,106	4,471,727	814,621	22%
72211	Full-Service Restaurants	4,106,893	4,891,067	784,174	19%
54151	Computer Systems Design and Related Services	1,285,468	1,864,275	578,807	45%
62161	Home Health Care Services	775,632	1,346,303	570,671	74%
56132	Temporary Help Services	2,154,662	2,661,165	506,503	24%
62211	General Medical and Surgical Hospitals (Private)	3,964,761	4,454,021	489,260	12%
62412	Services for the Elderly and Persons with Disabilities	411,921	882,963	471,042	114%
62111	Offices of Physicians	2,086,977	2,507,418	420,441	20%
61131	Colleges, Universities, and Professional Schools (Private)	1,483,620	1,864,587	380,967	26%
55111	Management of Companies and Enterprises	1,660,137	2,036,409	376,272	23%
45291	Warehouse Clubs and Supercenters	891,459	1,265,719	374,260	42%
81411	Private Households	961,239	1,312,269	351,030	37%
54161	Management Consulting Services	775,207	1,122,105	346,898	45%
90119	Federal Government, Civilian, Excluding Postal Service	2,028,127	2,307,030	278,903	14%
42512	Wholesale Trade Agents and Brokers	597,226	869,383	272,157	46%
62331	Community Care Facilities for the Elderly	566,042	816,011	249,969	44%
90261	Education (State Government)	2,337,157	2,564,910	227,753	10%
21311	Support Activities for Mining	187,163	411,448	224,285	120%
62149	Other Outpatient Care Centers	273,899	482,616	208,717	76%
56173	Landscaping Services	892,396	1,080,182	187,786	21%
54169	Other Scientific and Technical Consulting Services	85,780	261,143	175,363	204%
56172	Janitorial Services	1,054,748	1,226,010	171,262	16%
49311	General Warehousing and Storage	434,245	582,454	148,209	34%
54133	Engineering Services	810,058	957,353	147,295	18%
56111	Office Administrative Services	313,730	457,339	143,609	46%

Source: QCEW Employees, Non-QCEW Employees & Self-Employed - EMSI 2013.3 Class of Worker

## State of Vermont Comprehensive Economic Development Strategy

### *Projected Growth 2013-2023 (2-digit NAICS)*

Projected changes in employment from 2013 to 2023 are presented in the following tables. Notable observations from the projected industry data include:

- Over the next ten years, Vermont is projected to add nearly 30,000 more jobs (8% increase), New England is expected to add over 833,000 new jobs (11% increase) and the United States will add over 17 million new jobs (11% increase).
- Vermont is projected to grow slightly slower than the other two geographies in terms of job creation but overall activity will increase compared to the last 10 years when Vermont's jobs grew by only 2% over the ten years.
- Health Care and Social Assistance in Vermont is projected to increase by over 11,500 jobs through 2023. (Recall the demographic analysis that indicated that Vermont was home to one of the oldest populations in the entire United States.)
- The growth of Professional, Scientific, and Technical Services is promising as these are typically well paying jobs that require higher education.
- Similar to the historic growth, the Services for the Elderly and Persons with Disabilities industry is projected to continue to be the fastest growing industry, adding 5,313 new jobs in Vermont.
- Service industries continue to be drivers of the Vermont economy including Full Service Restaurants, Drug Stores, Sporting Goods Stores, and Health Care Services all adding jobs over the next 10 years.
- Consulting firms and professional service providers are adding jobs in the New England region, including Computer System Design and Related Services, Management Consulting Services, Portfolio Management, and Engineering Services.
- The United States is projecting a 13% increase in Limited Service Eating Places and a 13% increase in Full Service Restaurants. Health care related services are also expecting to see job growth over the next 10 years.

## State of Vermont Comprehensive Economic Development Strategy

### Projected Growth 2013-2023 (2-digit NAICS)

Projected Growth 2013-2023 (2-digit NAICS)							
NAICS Code	Description	Vermont		New England		United States	
		# Change	% Change	# Change	% Change	# Change	% Change
11	Agriculture, Forestry, Fishing and Hunting	-382	-6%	-464	-1%	-58,121	-3%
21	Mining, Quarrying, and Oil and Gas Extraction	-32	-5%	26	1%	172,570	21%
22	Utilities	-60	-3%	-3,256	-14%	5,691	1%
23	Construction	1,864	8%	42,127	11%	1,082,450	14%
31	Manufacturing	534	2%	70	0%	13,188	0%
42	Wholesale Trade	946	9%	25,941	10%	669,942	11%
44	Retail Trade	3,639	9%	24,564	3%	1,264,112	8%
48	Transportation and Warehousing	813	11%	15,902	9%	603,427	12%
51	Information	-155	-3%	7,237	4%	114,010	4%
52	Finance and Insurance	-19	0%	81,733	21%	534,674	9%
53	Real Estate and Rental and Leasing	131	3%	1,058	1%	124,067	5%
54	Professional, Scientific, and Technical Services	2,815	16%	109,267	20%	1,903,925	20%
55	Management of Companies and Enterprises	579	32%	9,221	7%	192,505	9%
56	Administrative and Support and Waste Management and Remediation Services	1,538	12%	60,171	15%	1,590,713	17%
61	Educational Services (Private)	2,016	12%	60,796	17%	767,451	20%
62	Health Care and Social Assistance	11,644	22%	246,795	21%	4,042,278	22%
71	Arts, Entertainment, and Recreation	91	2%	17,646	14%	321,492	13%
72	Accommodation and Food Services	1,609	5%	39,719	7%	1,492,988	12%
81	Other Services (except Public Administration)	1,888	12%	66,155	17%	826,279	11%
90	Government	461	1%	28,959	3%	1,429,793	6%
99	Unclassified Industry	12	80%	-528	-85%	-37,511	-22%
<b>Total</b>		<b>29,932</b>	<b>8%</b>	<b>833,137</b>	<b>11%</b>	<b>17,055,924</b>	<b>11%</b>

Source: QCEW Employees, Non-QCEW Employees & Self-Employed - EMSI 2013.3 Class of Worker, Camoin Associates

### Projected Growth 2013-2023 (5-digit NAICS)

Vermont Projected Growth 2013-2023 (5-digit NAICS)					
NAICS Code	Description	2013 Jobs	2023 Jobs	# Change	% Change
62412	Services for the Elderly and Persons with Disabilities	8,233	13,546	5,313	65%
61131	Colleges, Universities, and Professional Schools (Private)	10,055	12,117	2,062	21%
62211	General Medical and Surgical Hospitals (Private)	12,662	14,367	1,705	13%
54151	Computer Systems Design and Related Services	3,918	5,068	1,150	29%
62331	Community Care Facilities for the Elderly	2,218	3,097	879	40%
81111	Automotive Mechanical and Electrical Repair and Maintenance	2,166	2,969	803	37%
72111	Hotels (except Casino Hotels) and Motels	10,996	11,746	750	7%
62441	Child Day Care Services	3,821	4,519	698	18%
72211	Full-Service Restaurants	10,570	11,220	650	6%
31192	Coffee and Tea Manufacturing	1,419	2,062	643	45%
54161	Management Consulting Services	2,370	2,985	615	26%
44511	Supermarkets and Other Grocery (except Convenience) Stores	8,136	8,719	583	7%
55111	Management of Companies and Enterprises	1,829	2,408	579	32%
23891	Site Preparation Contractors	2,976	3,511	535	18%
33451	Navigational, Measuring, Electromedical, and Control Instruments Manufacturing	1,803	2,319	516	29%
44611	Pharmacies and Drug Stores	1,853	2,362	509	27%
90361	Education (Local Government)	21,955	22,463	508	2%
45111	Sporting Goods Stores	1,441	1,932	491	34%
52212	Savings Institutions	1,549	2,027	478	31%
56149	Other Business Support Services	697	1,171	474	68%
90399	Local Government, Excluding Education and Hospitals	8,274	8,743	469	6%
62142	Outpatient Mental Health and Substance Abuse Centers	3,606	4,073	467	13%
54133	Engineering Services	1,677	2,144	467	28%
62111	Offices of Physicians	5,055	5,500	445	9%
49311	General Warehousing and Storage	1,038	1,477	439	42%

Source: QCEW Employees, Non-QCEW Employees & Self-Employed - EMSI 2013.3 Class of Worker, Camoin Associates

State of Vermont Comprehensive Economic Development Strategy

New England - Projected Growth

New England Projected Growth 2013-2023 (5-digit NAICS)					
NAICS Code	Description	2013 Jobs	2023 Jobs	# Change	% Change
62211	General Medical and Surgical Hospitals (Private)	307,000	365,957	58,957	19%
54151	Computer Systems Design and Related Services	121,985	164,971	42,986	35%
61131	Colleges, Universities, and Professional Schools (Private)	233,251	272,621	39,370	17%
62412	Services for the Elderly and Persons with Disabilities	54,835	85,458	30,623	56%
62161	Home Health Care Services	70,605	97,956	27,351	39%
56132	Temporary Help Services	112,151	137,418	25,267	23%
90361	Education (Local Government)	365,876	391,011	25,135	7%
62111	Offices of Physicians	126,260	147,872	21,612	17%
42512	Wholesale Trade Agents and Brokers	57,717	78,183	20,466	35%
72211	Full-Service Restaurants	263,259	282,639	19,380	7%
54161	Management Consulting Services	69,147	87,641	18,494	27%
52392	Portfolio Management	26,749	45,238	18,489	69%
62331	Community Care Facilities for the Elderly	41,293	58,860	17,567	43%
54171	Research and Development in the Physical, Engineering, and Life Sciences	57,967	75,330	17,363	30%
72221	Limited-Service Eating Places	191,003	206,950	15,947	8%
81311	Religious Organizations	53,777	68,781	15,004	28%
56173	Landscaping Services	58,008	70,282	12,274	21%
52411	Direct Life, Health, and Medical Insurance Carriers	70,231	82,351	12,120	17%
90261	Education (State Government)	120,170	132,224	12,054	10%
52393	Investment Advice	18,545	29,532	10,987	59%
81411	Private Households	85,480	96,008	10,528	12%
62419	Other Individual and Family Services	37,079	47,443	10,364	28%
54133	Engineering Services	45,306	55,605	10,299	23%
55111	Management of Companies and Enterprises	124,375	133,596	9,221	7%
81341	Civic and Social Organizations	34,061	43,275	9,214	27%

Source: QCEW Employees, Non-QCEW Employees & Self-Employed - EMSI 2013.3 Class of Worker, Camoin Associates

State of Vermont Comprehensive Economic Development Strategy

United States - Projected Growth

United States Projected Growth 2013-2023 (5-digit NAICS)					
NAICS Code	Description	2013 Jobs	2023 Jobs	# Change	% Change
72221	Limited-Service Eating Places	4,471,727	5,070,888	599,161	13%
72211	Full-Service Restaurants	4,891,067	5,531,014	639,947	13%
54151	Computer Systems Design and Related Services	1,864,275	2,470,960	606,685	33%
62161	Home Health Care Services	1,346,303	1,954,931	608,628	45%
56132	Temporary Help Services	2,661,165	3,405,174	744,009	28%
62211	General Medical and Surgical Hospitals (Private)	4,454,021	5,086,945	632,924	14%
62412	Services for the Elderly and Persons with Disabilities	882,963	1,301,983	419,020	47%
62111	Offices of Physicians	2,507,418	3,045,186	537,768	21%
61131	Colleges, Universities, and Professional Schools (Private)	1,864,587	2,262,352	397,765	21%
55111	Management of Companies and Enterprises	2,036,409	2,228,914	192,505	9%
45291	Warehouse Clubs and Supercenters	1,265,719	1,652,284	386,565	31%
81411	Private Households	1,312,269	1,510,090	197,821	15%
54161	Management Consulting Services	1,122,105	1,486,595	364,490	32%
90119	Federal Government, Civilian, Excluding Postal Service	2,307,030	2,296,196	(10,834)	0%
42512	Wholesale Trade Agents and Brokers	869,383	1,179,065	309,682	36%
62331	Community Care Facilities for the Elderly	816,011	1,123,248	307,237	38%
90261	Education (State Government)	2,564,910	2,855,041	290,131	11%
21311	Support Activities for Mining	411,448	518,291	106,843	26%
62149	Other Outpatient Care Centers	482,616	640,741	158,125	33%
56173	Landscaping Services	1,080,182	1,328,468	248,286	23%
54169	Other Scientific and Technical Consulting Services	261,143	404,442	143,299	55%
56172	Janitorial Services	1,226,010	1,367,632	141,622	12%
49311	General Warehousing and Storage	582,454	691,840	109,386	19%
54133	Engineering Services	957,353	1,204,660	247,307	26%
56111	Office Administrative Services	457,339	562,846	105,507	23%

Source: QCEW Employees, Non-QCEW Employees & Self-Employed - EMSI 2013.3 Class of Worker, Camoin Associates

## Concentrated Industries: Location Quotient

Location Quotient (LQ) analysis compares a specific geographic region to a larger reference area by quantifying how concentrated a particular industry, demographic group, or other variable is as compared to the larger geography. In this section, we compare employment by industry in Vermont compared to the U.S. to identify which industries are more highly concentrated in the region than at the national level.

LQ is calculated by dividing the percent of jobs within each industry locally by the percent of jobs in the same industry at the national level. For example, if the Finance and Insurance industry accounts for 2% of jobs in a community and at the national level this industry has 1% of the total jobs, the community has an LQ of 2.0 ( $0.02 \div 0.01 = 2$ ). In this example, the local community employs twice as many individuals in the industry as expected based on national employment patterns. Typically, only values above 1.20 or below 0.80 are considered “significant” findings for LQ analysis. Industries with a high LQ and high employment numbers are assumed to produce more than what is needed locally (i.e. a surplus) and export their products and services.

The following tables contain the results of the national LQ analysis for Vermont and New England at the 5-digit NAICS code levels.

From the LQ analysis, we note the following:

- Sixteen of the top twenty-five most concentrated industries in Vermont are manufacturing/production related, including Breweries, Logging, Ice Cream and Frozen Dessert Manufacturing, Coffee and Tea Manufacturing.
- Coffee and Tea Manufacturing has become much more concentrated between 2003 and 2013
- Specialty health care industries are showing high concentrations in Vermont including Outpatient Mental Health and Substance Abuse Centers ( 3,606 employees and a 7.29 LQ) and Services for the Elderly and Persons with Disabilities (8,233 employees and a 3.94 LQ)

**Sixteen of the top twenty-five most concentrated industries in Vermont are manufacturing and production related.**

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Vermont - National LQ

Vermont National Location Quotient (5-digit NAICS)				
NAICS	Description	2013 Jobs	2003 LQ	2013 LQ
31192	Coffee and Tea Manufacturing	1,419	2.78	32.74
31152	Ice Cream and Frozen Dessert Manufacturing	610	8.31	12.27
72119	Other Traveler Accommodation	636	12.60	9.16
33322	Plastics and Rubber Industry Machinery Manufacturing	303	8.31	9.01
62142	Outpatient Mental Health and Substance Abuse Centers	3,606	8.21	7.29
45431	Fuel Dealers	1,248	6.46	6.98
32213	Paperboard Mills	441	6.37	6.41
32711	Pottery, Ceramics, and Plumbing Fixture Manufacturing	255	3.95	6.10
33993	Doll, Toy, and Game Manufacturing	189	8.12	6.08
21239	Other Nonmetallic Mineral Mining and Quarrying	176	7.91	5.76
33512	Lighting Fixture Manufacturing	466	1.83	5.51
33441	Semiconductor and Other Electronic Component Manufacturing	4,917	6.19	5.46
33599	All Other Electrical Equipment and Component Manufacturing	438	1.29	5.06
31511	Hosiery and Sock Mills	111	1.03	5.02
32799	All Other Nonmetallic Mineral Product Manufacturing	651	6.95	4.44
31133	Confectionery Manufacturing from Purchased Chocolate	320	3.68	4.43
71392	Skiing Facilities	362	3.38	4.32
31151	Dairy Product (except Frozen) Manufacturing	1,158	4.86	4.30
44421	Outdoor Power Equipment Stores	323	2.52	4.15
61163	Language Schools (Private)	225	6.51	4.15
31212	Breweries	301	2.10	4.11
62412	Services for the Elderly and Persons with Disabilities	8,233	2.93	3.94
32199	All Other Wood Product Manufacturing	487	3.70	3.92
33592	Communication and Energy Wire and Cable Manufacturing	190	3.82	3.82
11331	Logging	654	2.89	3.74

Source: QCEW Employees, Non-QCEW Employees & Self-Employed - EMSI 2013.3 Class of Worker, Camoin Associates

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New England - National LQ

New England National Location Quotient (5-digit NAICS)				
NAICS	Description	2013 Jobs	2003 LQ	2013 LQ
31332	Fabric Coating Mills	1,419	2.78	32.74
52511	Pension Funds	610	8.31	12.27
11411	Fishing	636	12.60	9.16
45431	Fuel Dealers	303	8.31	9.01
31621	Footwear Manufacturing	3,606	8.21	7.29
33511	Electric Lamp Bulb and Part Manufacturing	1,248	6.46	6.98
33592	Communication and Energy Wire and Cable Manufacturing	441	6.37	6.41
33991	Jewelry and Silverware Manufacturing	255	3.95	6.10
52212	Savings Institutions	189	8.12	6.08
31322	Narrow Fabric Mills and Schifflli Machine Embroidery	176	7.91	5.76
42446	Fish and Seafood Merchant Wholesalers	466	1.83	5.51
52392	Portfolio Management	4,917	6.19	5.46
33221	Cutlery and Handtool Manufacturing	438	1.29	5.06
33661	Ship and Boat Building	111	1.03	5.02
52413	Reinsurance Carriers	651	6.95	4.44
71393	Marinas	320	3.68	4.43
33431	Audio and Video Equipment Manufacturing	362	3.38	4.32
61131	Colleges, Universities, and Professional Schools (Private)	1,158	4.86	4.30
62231	Specialty (except Psychiatric and Substance Abuse) Hospitals (Private)	323	2.52	4.15
71392	Skiing Facilities	225	6.51	4.15
44522	Fish and Seafood Markets	301	2.10	4.11
32791	Abrasive Product Manufacturing	8,233	2.93	3.94
48541	School and Employee Bus Transportation	487	3.70	3.92
72119	Other Traveler Accommodation	190	3.82	3.82
62141	Family Planning Centers	654	2.89	3.74
52212	Savings Institutions	1,549	1.29	3.73

Source: QCEW Employees, Non-QCEW Employees & Self-Employed - EMSI 2013.3 Class of Worker, Camoin Associates

## Occupation Analysis

In addition to looking at employment by industry, we analyze employment by occupation. Occupations refer not to the product or service being provided, but the defined set of tasks of the employee in question. Occupations are classified using the Standard Occupational Classification (“SOC”) system. This is the system used by Federal statistical agencies to classify workers into one of 840 occupational categories. For more detail on occupations and the SOC, we refer the reader to <http://www.bls.gov/soc/>.

All occupation data for this report was collected from EMSI Complete Employment.

Occupational data is helpful in evaluating how the skills, education, and certifications of a particular community’s residents match up with the area’s occupational needs of the future. The report identifies the top occupations and fastest growing occupations within Vermont.

### Top Occupations

The first occupational dataset shows the top 25 occupations at the 5-digit SOC code level ranked by the number of jobs in 2013. The 5-digit level includes such occupations as Teachers’ Assistants, Registered Nurses, Military Occupations, and Truck Drivers.

The 2013 average earnings for each occupation are also provided, calculated by the average hourly earnings (from EMSI) multiplied by 2,080 hours. These figures are used to identify the wage ranges of the largest occupational categories to determine if the employment base of a community is composed primarily of high-, medium-, or low-wage jobs.

The primary takeaways from the occupation data include:

- Retail Salesperson is the largest occupation group in Vermont with 9,910 jobs.
- The top occupations are fairly low paying, with Registered Nurses being the highest paid of the top 10 largest occupations at just under \$63,300 per year.
- Many of the occupations require only short-term on-the-job training in terms of education.

State of Vermont Comprehensive Economic Development Strategy

Vermont - Top Occupations

Vermont Top Occupations (5-digit SOC)				
SOC	Description	2013 Jobs	Average Annual Earnings	Education Level
41-2031	Retail Salespersons	9,910	\$26,666	Short-term on-the-job training
41-2011	Cashiers	9,454	\$21,445	Short-term on-the-job training
39-9021	Personal Care Aides	8,231	\$22,443	Short-term on-the-job training
43-6014	Secretaries and Admin Assistants, Except Legal, Medical, and Executive	7,698	\$31,346	Short-term on-the-job training
29-1141	Registered Nurses	6,716	\$63,294	Associate's degree
25-9041	Teacher Assistants	6,051	\$27,144	Short-term on-the-job training
43-3031	Bookkeeping, Accounting, and Auditing Clerks	5,839	\$35,214	Moderate-term on-the-job training
35-3021	Combined Food Preparation and Serving Workers, Including Fast Food	5,453	\$21,403	Short-term on-the-job training
37-2011	Janitors and Cleaners, Except Maids and Housekeeping Cleaners	5,428	\$25,626	Short-term on-the-job training
37-2012	Maids and Housekeeping Cleaners	4,888	\$20,883	Short-term on-the-job training
47-2031	Carpenters	4,556	\$36,275	Long-term on-the-job training
35-3031	Waiters and Waitresses	4,535	\$26,333	Short-term on-the-job training
53-3032	Heavy and Tractor-Trailer Truck Drivers	4,394	\$37,752	Short-term on-the-job training
55-9999	Military occupations	4,364	\$45,510	N/A
25-1099	Postsecondary Teachers	4,306	\$90,438	Doctoral degree
39-9011	Childcare Workers	3,966	\$18,699	Short-term on-the-job training
41-1011	First-Line Supervisors of Retail Sales Workers	3,780	\$37,898	Work experience in a related occupation
37-3011	Landscaping and Groundskeeping Workers	3,543	\$26,666	Short-term on-the-job training
43-9061	Office Clerks, General	3,495	\$27,955	Short-term on-the-job training
49-9071	Maintenance and Repair Workers, General	3,447	\$36,317	Moderate-term on-the-job training
25-2021	Elementary School Teachers, Except Special Education	3,405	\$52,312	Bachelor's degree
11-1021	General and Operations Managers	3,292	\$103,210	Bachelor's or higher degree, plus work exp
43-4051	Customer Service Representatives	3,217	\$32,365	Short-term on-the-job training
13-2011	Accountants and Auditors	3,160	\$65,499	Bachelor's degree
43-5081	Stock Clerks and Order Fillers	3,128	\$25,438	Short-term on-the-job training

Source: QCEW Employees, Non-QCEW Employees & Self-Employed - EMSI 2013.3 Class of Worker, Camoin Associates

### Occupation Growth 2003-2013 and 2013-2023

To determine which occupations are experiencing the highest growth rate, the past and anticipated change in employment (i.e. increase in the number of jobs) is provided by EMSI for 2003 to 2013 and 2013 to 2023. This information is provided at the 5-digit SOC code level.

#### Historic Growth 2003-2013

The following table shows the top twenty five occupations that saw the largest increase in total employment between 2003 and 2013.

- Social and human services make up a large portion of the growing occupations including Personal Care Aides, Registered Nurses, Social and Human Service Assistants, Teacher Assistants, etc.
- Personal Care Aides saw the largest increase in number of people in the profession, adding just under 4,400 or a 114% increase.
- Combined Food Preparation and Serving Workers, Waiters and Waitresses, Cooks, and First-Line Supervisors of Retail Sales workers all saw an increase in number of people in the occupation.

Vermont - Historic Occupation Growth

Vermont Occupation Growth 2003-2013 (5-digit SOC)					
SOC	Description	2003 Jobs	2013 Jobs	# Change	% Change
39-9021	Personal Care Aides	3,853	8,231	4,378	114%
29-1141	Registered Nurses	5,451	6,716	1,265	23%
21-1093	Social and Human Service Assistants	2,004	2,462	458	23%
49-3023	Automotive Service Technicians and Mechanics	2,254	2,695	441	20%
13-1041	Compliance Officers	1,620	2,032	412	25%
25-9041	Teacher Assistants	5,656	6,051	395	7%
45-2092	Farmworkers and Laborers, Crop, Nursery, and Greenhouse	1,186	1,565	379	32%
13-1111	Management Analysts	916	1,295	379	41%
41-1011	First-Line Supervisors of Retail Sales Workers	3,413	3,780	367	11%
51-9111	Packaging and Filling Machine Operators and Tenders	1,435	1,775	340	24%
13-1161	Market Research Analysts and Marketing Specialists	973	1,291	318	33%
11-9199	Managers, All Other	1,295	1,593	298	23%
35-3021	Combined Food Preparation and Serving Workers, Including Fast Food	5,159	5,453	294	6%
37-3011	Landscaping and Groundskeeping Workers	3,258	3,543	285	9%
25-1099	Postsecondary Teachers	4,022	4,306	284	7%
15-1142	Network and Computer Systems Administrators	1,110	1,378	268	24%
27-2022	Coaches and Scouts	1,113	1,366	253	23%
15-1151	Computer User Support Specialists	1,496	1,747	251	17%
39-9011	Childcare Workers	3,718	3,966	248	7%
35-3031	Waiters and Waitresses	4,290	4,535	245	6%
25-2021	Elementary School Teachers, Except Special Education	3,168	3,405	237	7%
43-3031	Bookkeeping, Accounting, and Auditing Clerks	5,605	5,839	234	4%
35-2014	Cooks, Restaurant	2,130	2,351	221	10%
41-1012	First-Line Supervisors of Non-Retail Sales Workers	866	1,085	219	25%
29-2041	Emergency Medical Technicians and Paramedics	400	597	197	49%

Source: QCEW Employees, Non-QCEW Employees & Self-Employed - EMSI 2013.3 Class of Worker, Camoin Associates

## State of Vermont Comprehensive Economic Development Strategy

### Projected Growth 2013-2023

The following table presents the top 25 occupations that are projected to grow the fastest. The primary highlights include:

- Personal Care Aides are expected to see the largest increases with over 3,500 jobs added.
- Of the top five occupations projected to grow the fastest, three are health care related. Home Health Aides are projected to add 860 jobs and grow by 112% (the largest percent increase on the table).
- Service industries are appearing frequently on the table including Maids and Housekeeping Cleaners (adding 492 jobs), Childcare Worker (adding 447 jobs), Waiters and Waitresses (adding 311 jobs), and Retail Salespersons (adding 1,215 jobs)

### Vermont - Projected Occupation Growth

Vermont Occupation Growth 2013-2023 (5-digit SOC)					
SOC	Description	2013 Jobs	2023 Jobs	# Change	% Change
39-9021	Personal Care Aides	8,231	11,827	3,596	44%
41-2031	Retail Salespersons	9,910	11,125	1,215	12%
29-1141	Registered Nurses	6,716	7,717	1,001	15%
31-1011	Home Health Aides	766	1,626	860	112%
49-3023	Automotive Service Technicians and Mechanics	2,695	3,428	733	27%
43-9061	Office Clerks, General	3,495	4,164	669	19%
37-2012	Maids and Housekeeping Cleaners	4,888	5,380	492	10%
25-1099	Postsecondary Teachers	4,306	4,775	469	11%
41-2011	Cashiers	9,454	9,910	456	5%
39-9011	Childcare Workers	3,966	4,413	447	11%
43-4051	Customer Service Representatives	3,217	3,662	445	14%
53-7062	Laborers and Freight, Stock, and Material Movers, Hand	2,299	2,720	421	18%
21-1093	Social and Human Service Assistants	2,462	2,854	392	16%
41-1011	First-Line Supervisors of Retail Sales Workers	3,780	4,168	388	10%
43-3031	Bookkeeping, Accounting, and Auditing Clerks	5,839	6,214	375	6%
13-1111	Management Analysts	1,295	1,629	334	26%
13-1161	Market Research Analysts and Marketing Specialists	1,291	1,605	314	24%
35-3031	Waiters and Waitresses	4,535	4,846	311	7%
49-9071	Maintenance and Repair Workers, General	3,447	3,746	299	9%
41-4012	Sales Representatives, Wholesale and Manufacturing, Except Technical and Scientific Products	2,922	3,192	270	9%
31-1014	Nursing Assistants	3,081	3,346	265	9%
25-9041	Teacher Assistants	6,051	6,315	264	4%
35-3021	Combined Food Preparation and Serving Workers, Including Fast Food	5,453	5,716	263	5%
25-2021	Elementary School Teachers, Except Special Education	3,405	3,668	263	8%
43-4171	Receptionists and Information Clerks	2,346	2,605	259	11%

Source: QCEW Employees, Non-QCEW Employees & Self-Employed - EMSI 2013.3 Class of Worker, Camoin Associates

## Establishment Stage

The following table shows the breakdown of establishments in Vermont by their size. Nearly one-third of all employees in Vermont work for establishments that have fewer than 9 employees, and over 70% work for establishments with fewer than 99 employees. Between 2003 and 2012 (the data available from YourEconomy.org), the establishments identified as having only one employee grew by the largest amount, whereas the number of employees employed by large businesses (over 500 employees) declined by 1.8%.

Jobs by Establishment Type in Vermont			
Company Stage	Number of Jobs (2012)	Percent of All Jobs (2012)	Percent Growth Between 2003-2012
Total	423,868	100%	
Self (1)	20,835	5%	5.40%
Stage 1 (2-9)	112,478	27%	2.80%
Stage 2 (10-99)	165,571	39%	0.60%
Stage 3 (100-499)	82,830	20%	0.90%
Stage 4 (500+)	42,154	10%	-1.80%

Source: YourEconomy.org