



THE 2017 CENTRAL FLORIDA EMPLOYMENT OUTLOOK SURVEY

GOAL OF SURVEY

The OrlandoJobs.com Central Florida Employment Outlook Survey is a trusted survey dedicated to understanding employment trends in the Orlando MSA. This year is the 9th annual release of the survey, which always has the goal of getting the “inside scoop” from employers to what is really going on in the Central Florida employment marketplace. OrlandoJobs.com accomplishes this by calling employers directly (not online) and asking them point-blank questions to discover who has current and future job openings, hiring challenges and their overall hiring direction.

In addition, we always discover some additional hiring information not found in a typical employment outlook. This year, we wondered what companies are doing to enhance the job seeker experience; especially how they treat all the candidates that apply to a job and never hear back (which is the #1 complaint from job seekers-page 10).

While the unemployment rate in Central Florida is 4.2% (2/17 BLS), employers are very clear that they are having a hard time finding talent. But is that the entire story? Not at all. After talking to 135 employers covering 19 sectors – representing, in total over 224,000 employees – this survey finds that hiring in Orlando is very vibrant, in addition to being challenging. Most of all, these survey results show a lack of talent across almost all sectors, not just healthcare and technology. Orlando has a shortage of skilled trades’ workers, bus drivers, housekeepers and customer service professionals.

Employers can use this survey to get a real feel of the hiring environment in the Orlando MSA. OrlandoJobs.com endeavors to provide you with a unique look on the Orlando MSA employment scene so you get a sense of what is really going on at our surveyed companies and how this information may help your company plan out hiring in 2017. We also report on how many companies are getting hires directly from social media (Facebook, LinkedIn and Twitter). Should your company be spending more time in social? Page 7 may help you decide.



All-time number of people are working in the Orlando MSA.

1.23 Million (1/17)



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METHODOLOGY

OrlandoJobs.com conducted individual phone interviews with 135 companies based in the Orlando MSA between February 13 to March 14, 2017. OrlandoJobs.com account managers spoke directly with key human resource professionals, internal recruiters and business owners for the information compiled in this report.

The 135 companies surveyed employ a total of 224,432 people in Central Florida. The companies represent 19 different industries, including aerospace/aviation, banking/finance, call center, construction, education, government, healthcare, hospitality, legal, insurance, manufacturing, non-profit, real estate, retail, sports/entertainment, technology, timeshare, transportation and utilities.

We called and spoke with 135 employers representing over 224,000 Central Florida employees to find out the inside scoop on the real trends for hiring in this region.

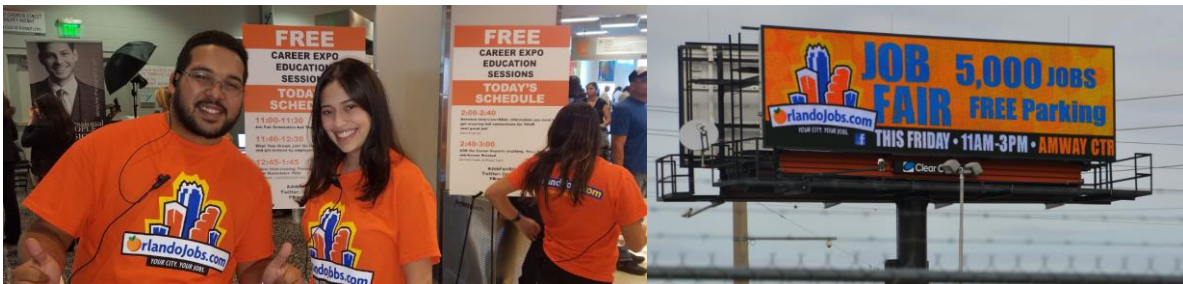


KEY FINDINGS

According to Forbes Magazine, Orlando Florida ranked #3 in 2017 for the [Best Cities for Jobs](#) right behind Plano, Texas and Scottsdale Arizona. The OrlandoJobs.com 2017 Central Florida Employment Outlook survey team doesn't think they have that ranking high enough. As you read through this survey of 135 companies representing 19 sectors and 227,000 employees, you will notice the Orlando MSA has been on a five-year upswing in hiring across ALL sectors.

Key findings in the 2017 survey include:

- A total of **13,323 jobs** currently open within the 135 surveyed companies.
- This same group of companies predicts another **24,300 jobs** will open in the last three quarters of 2017.
- 39% of surveyed companies indicate that hiring will be better in 2017 when compared to 2016.
- 96% of companies plan on hiring at least one person in 2017.
- 83% of companies currently have open jobs.
- The construction industry gained 8,000 jobs last year in the Orlando MSA for a total gain of 71,000 jobs.
- 32% of companies surveyed will be hiring 50 or more employees in 2017.
- Finding candidates via social media recruiting is still proving to be very spotty.
- Top industries hiring in Central Florida are healthcare, skill trades, technology, sales, construction and education.
- Hiring challenges in 2017, besides too many unqualified candidates, include employers trying to figure out which recruiting resources will work well to attract job seekers to their companies.
- Hoping to offset a lack of skilled talent in 2017, Orlando is once again experiencing a steady a growing population (net 138 people per day).



OrlandoJobs.com hosts the largest Diversity Job Fair in the Southeast at the AMWAY CENTER every year (November 17, 2017 this year). Our volunteers from UCF Rock!

2017 CENTRAL FLORIDA EMPLOYMENT LANDSCAPE

MONTH & YEAR	LABOR FORCE	EMPLOYMENT	UNEMPLOYMENT	UNEMPLOYMENT RATE
DECEMBER 2016	1,280,106	1,217,862	62,244	4.9%
DECEMBER 2015	1,230,194	1,176,170	54,024	4.4%
DECEMBER 2014	1,207,777	1,145,575	62,202	5.2%
DECEMBER 2013	1,160,520	1,093,505	67,015	5.8%
DECEMBER 2012	1,156,753	1,067,743	89,010	7.7%
DECEMBER 2011	1,128,950	1,017,511	111,439	9.9%
DECEMBER 2010	1,116,201	994,180	122,021	10.9%
DECEMBER 2009	1,098,315	972,909	125,406	11.4%
DECEMBER 2008	1,118,564	1,029,044	89,520	8.0%
DECEMBER 2007	1,115,486	1,067,595	47,891	4.3%

Source: Local Area Unemployment Statistics (LAUS) Bureau of Labor Statistics (BLS)

The growing economy combined with a growing confidence in consumer spending, as well as rising home prices, have had a very positive effect on Central Florida. First, those workers who are able to work but have been sitting on the sidelines are re-entering the workforce. Secondly, Central Florida has a growing population. People from all over the country are moving to Central Florida (net 138 a day) which is a complete reversal from just a few years ago. Finally, rising consumer confidence (and home values) give employees reasons to change jobs without a lot of fear of moving to a new company or being upside down on their home.

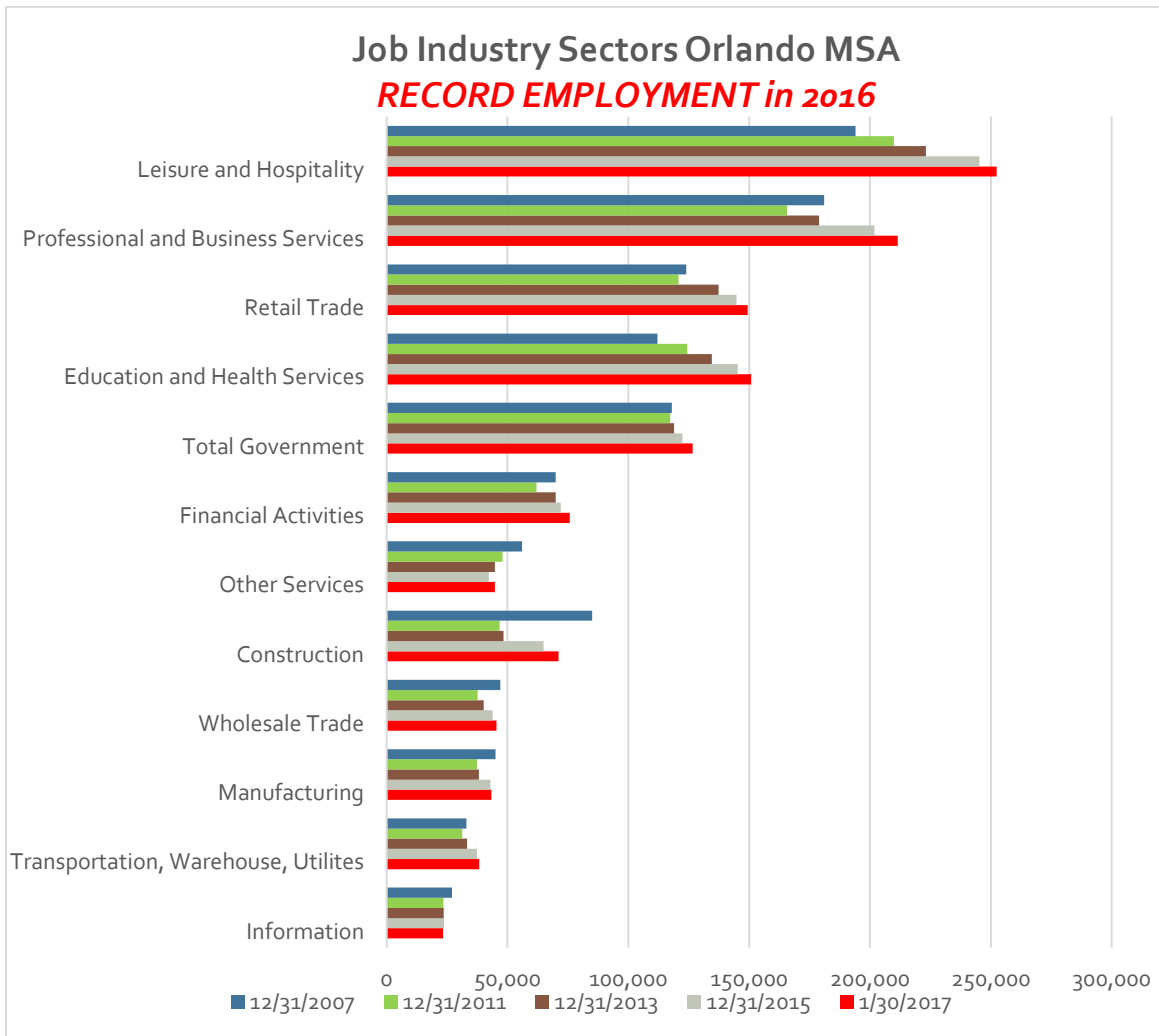
THE U-3, U-6 UNEMPLOYMENT RATE IN FLORIDA

The “U-6” unemployment rate includes those people who have been looking for full-time work but settled for part-time work during the last twelve months. For Florida, the [U-6 rate for 2016](#) was 10.3%. This rate has been declining since it reached its high of 19.8% in 2010.

As this rate declines, so does the candidate pool in Central Florida. However, Central Florida actually just saw its U-3 unemployment rate tick up due to adding more than 50,000 people to the workforce. Our growing population may be outpacing the number of jobs being created. The key to this statistic is hard to measure since many of the open jobs in Central Florida require some extremely targeted job skills (nurse, engineer, technology, etc.).

Orlando metro population now totals 2,387,138 people.

Historical Employment by Industry (December 2016, 2015, 2013, 2011, 2007)



This chart represents Central Florida’s employment DNA. What makes Central Florida unique to most major cities is that we have the largest tourism and hospitality industry in the world. You can travel the globe and if you tell people you are from Orlando, they know exactly where that is located. Their association with us is our theme parks (Disney, Universal, Sea World, etc.), which is part of the leisure and hospitality industry that now employs more than 240,000 people (all-time record).

What is exciting is our professional services jobs sector is growing with more than 210,000 workers (all-time high as well). This is a direct result of our region’s commitment to dedicate resources to attract employers to locate here and to retain employers to grow their businesses here, while producing higher paying jobs. Additionally, all over Central Florida, you have tremendous investments in other sectors really paying off. Orlando is known for our theme parks but most don’t know we also have the #1 military simulation industry cluster in the world. Orlando boasts a growing array of technology companies, health services and college and universities. All of this adds up to high-paying professional services jobs in many different industry fields.



SURVEY BREAKDOWN

QUESTION 1: COMPARED TO 2016, WILL YOUR OVERALL TOTAL HIRING FORECAST BE BETTER, THE SAME OR WORSE IN 2017?

	February 2017	February 2016	February 2015	February 2014	January 2013	February 2010	December 2009
WORSE	6%	9%	4%	7%	10%	10%	27%
SAME	55%	49%	54%	52%	51%	51%	64%
BETTER	39%	42%	42%	41%	39%	39%	9%

QUESTION 2: DOES YOUR COMPANY HAVE ANY CURRENT JOB OPENINGS IN CENTRAL FLORIDA?

	February 2017	February 2016	February 2015	February 2014	January 2013	February 2010	December 2009
YES	83%	89%	71%	88%	89%	67%	45%
NO	17%	11%	29%	12%	11%	33%	55%

QUESTION 3: WHAT IS YOUR CENTRAL FLORIDA HIRING OUTLOOK FOR THE 2ND, 3RD AND 4TH QUARTERS OF 2017, BY NUMBER OF FUTURE HIRES?

Forecasted Hires in Q2, Q3 & Q4 of 2017	Feb. 2017	Feb. 2016	Feb. 2015	Feb. 2014	Jan. 2013	Feb. 2010	Sept. 2009
<i>NO Hires</i>	4.4%	3.47%	3.3%	4.3%	2.1%	9.1%	41.5%
<i>1-5 Hires</i>	28.2%	17.36%	30.5%	31.52%	13.7%	27.3%	24.4%
<i>6-10 Hires</i>	8.28%	7.64%	8.4%	9.7%	13.7%	13%	10.4%
<i>11-20 Hires</i>	14.82%	15.28%	13%	13%	16.3%	10.4%	7.4%
<i>21-50 Hires</i>	11.85%	19.44%	9.7%	9.7%	21.8%	15.6%	11.9%
<i>51-100 Hires</i>	11.8%	15.28%	9.7%	10.8%	8.6%	7.8%	5.2%
<i>101-200 Hires</i>	8.8%	10.42%	8.4%	9.7%	9.6%	9.1%	3.7%
<i>201 or More Hires</i>	11.85%	11.11%	17.0%	17.3%	17.3%	13%	2.2%

This survey found more than 13,232 open positions at the 135 surveyed companies. The year 2017 doesn't look like it will be slowing down anytime soon with a robust 24,300 jobs projected to be filled just from the surveyed companies.

The Orlando MSA added over 48,000 private sector jobs in 2016 leading the state in job creation. ([#3 nationally for best city for jobs-2016-Forbes](#))



QUESTION 4: HAS YOUR COMPANY HIRED ANYONE DIRECTLY USING SOCIAL MEDIA (FACEBOOK, LINKEDIN OR TWITTER) IN 2016? IF YES, PLEASE INDICATE THE SOURCE AND NUMBER OF TOTAL HIRES.

YEAR	YES	NO	Companies Reporting	LinkedIn Hires	Facebook Hires	Twitter Hires
Feb. 2017	34%	66%	80	167	27	0
Feb. 2016	31%	69%	113	141	25	15
Feb. 2015	20%	80%	90	54	32	0
Feb. 2014	21%	79%	107	66	15	0
Jan. 2013	27%	73%	187	123	12	0
Jan. 2012	19%	81%	159	57	2	0

Most of the 80 companies surveyed use social media, but nowhere near the level of a true, deep dive strategy with measurable results. That is because many companies don't have a social media recruiting strategy. In this survey, the success from LinkedIn usually was just a job posting, however the 167 hires reported is not bad. For Facebook, the 27 hires that were made came from companies that did updates on their company Facebook page with a job posting. Some companies sponsored and targeted the update (good strategy but costs money) to get more views. For many companies in Orlando, they have minimal Facebook or Twitter followers so job posts essentially don't get much traffic. Going forward, we may see these numbers start to tick up as Facebook has started a marketing focus on their jobs listings options to consumers who manage a Page.

Many companies told us that they are not allowed to post jobs on their company Facebook page yet. This was not so surprising in 2010 since they didn't want to give anyone with a keyboard the opportunity to make nasty comments about their company. But in 2017, the opposite is somewhat true, since consumers are accustomed to look at "ratings" on anything they do before they make a decision. Social media works well for companies with good reputations and showcase their jobs.

One surveyed company shared that they have built in a homemade "social employee referral program" where they allow their employees to choose to post certain positions to their personal Facebook and LinkedIn feeds. If any of their friends or connections apply and get hired, they pay a small referral fee. They have made a few hires in 2016 with this program.

Most employers are not using advanced social media recruiting strategies to find talent on Facebook, LinkedIn and Twitter in the Orlando MSA.

QUESTION 5: EMPLOYERS, WHAT ARE YOUR GREATEST HIRING CHALLENGES IN CENTRAL FLORIDA IN 2017?

The Orlando MSA is ground zero for hiring in the country, with employers hiring in almost every sector. And yet, many of our surveyed employers' internal recruiting departments share that they are unable to fill all their open positions and that their departments continue the years-long trend of being overwhelmed by applications. When you read through this list, you may find your company shares some of the same challenges. As the saying goes, "Misery loves company."

The top ten hiring challenges employers are facing:

1. **Getting plenty of resumes but very few qualified candidates.** This is the perennial #1 challenge. This year, a few employers mentioned that they were surprised that the volume of resumes they were receiving continues to trend high despite the unemployment rate being so low. The last time the unemployment rate was this low (4.7%) was 2007, right before the great recession, and employers couldn't even get a steady flow of unqualified candidates at that point in time.
2. **Too many applications taking too much time and manpower to sort, file and respond. It's a big problem for a lot of companies again this year.** Most companies recognize they do a horrible job at getting back to job seekers who are not selected for interviews. This year, we asked these employers what they do for the job seeker experience at their company and you can find that information on page 10. By far the number one complaint of job seekers is they never hear back from companies after they apply. Find out how other companies are handling this dilemma.
3. **Retention.** This is something we have not heard a lot about in the nine years we've been conducting this annual survey, likely because of the effects of the recession. The economy is getting better, the Orlando MSA has added a ton of new jobs, consumer confidence is rising and those already employed are changing jobs for more money or better opportunity. The combination of job growth and people leaving their current jobs is adding a lot of work to already overloaded HR departments. Employees who rode out the storm with their current employer in a very dicey job market are now perfect candidates for other jobs and they are taking advantage.
4. **Cost of hiring is increasing.** The nice thing about a recession is that companies don't need to spend a ton of money attracting candidates. But now the recession is over and many companies indicated that they have not budgeted correctly for recruiting sources (job boards, staffing agencies, technology, etc.) to get enough qualified job seeker applications to handle the amount of jobs they need to fill.
5. **Figuring out where to spend their recruiting budgets to recruit job seekers.** Many employers were surprised to find that, today, many resources exist to help get applicants to their open jobs. The challenge for most employers is to put together a comprehensive plan and budget so they are making sure to get applicants to their administrative jobs as well as their high skilled jobs. On page 7, you will see many companies have invested in social media recruiting. While we don't know all the costs associated with it, they did report their hire results, which are lukewarm but slowly growing.
6. **Different year... same issue with healthcare workers.** Our healthcare employers are very clear: they have way too many job openings and not enough qualified candidates. This issue is being

attacked in many ways. For example, the Governor of Florida signed a bill allowing highly skilled nurses and [physician assistants to prescribe certain types of medication](#). This will take a heavy load off of physicians. Also, many schools in Central Florida, including the University of Central Florida, Seminole State College and Valencia College, are working directly with healthcare providers to develop very precise curriculum to ensure that upon graduation, students can walk right into fantastic jobs and are truly job ready on day one.

7. **Home Healthcare workers are in major shortage.** Central Florida (along with all retirement states in general) are in a very interesting situation: baby boomers are retiring in record numbers and many are moving to warmer climates. Home healthcare workers who go into homes to administer medicine, feed and take care of those in need are in high demand. Unfortunately, the jobs don't pay that well and require training, background checks and schedules that include weekend and night work, which don't attract large numbers of applicants
8. **Construction/Skilled Trade Jobs in demand.** If you drive around Central Florida, you will see residential, commercial and infrastructure construction in every part of the region. So many skilled jobs are open. Welders, plumbers, HVAC, carpenters, masons, drywall finishers and all other types are in high demand. Construction companies are recruiting from out of the area to bring in enough workers to keep up with demand. In 2016, the construction industry added over 6,500 jobs.
9. **Healthcare Benefits.** Nothing is a bigger cost to an employer than the healthcare benefits they provide for their employees. This is a huge recruiting and retention tool. However, many employers indicated that since their companies only pay a small portion of the employees' healthcare costs, it is hard to hire top candidates if they have other offers with a better benefits package. This is especially hard-hitting with smaller companies. Hidden in healthcare costs are also high deductibles. While those can lower monthly healthcare costs, employees with a lot of current medical needs will need to scrutinize an employer's health insurance and wellness plans when they are offered a new job. Additionally, with the issue in the news so much, hiring managers should expect more questions about their health plans during candidate interviews in the coming year.
10. **Hospitality and Leisure Jobs Shortage.** While the jobs in this industry may pay lower wages, Central Florida does have a very young workforce hailing from all over the world that helps fill these jobs. Employers in this sector have to deal with so many challenges (most on this list) that they have job openings 24/7. Disney World, for example, has a minimum wage of \$10.00 per hour. Companies that still pay the standard \$8.03 per hour are at a distinct disadvantage. This sector is also experiencing a huge deficit of housekeepers, lifeguards and bus drivers.

"Not only is it hard to find great talent, it is hard to keep them. We really have to make sure our onboarding and employee retention programs are on point."

Surveyed Employer

QUESTION 6: TELL US ABOUT HOW YOU HANDLE YOUR JOB SEEKER EXPERIENCE FOR THOSE WHO APPLY TO YOUR JOBS BUT ARE NOT QUALIFIED?

In addition to capturing the state of employment in Central Florida each year, we also like to ask employers questions about topical employment issues that are important to the region. For employers, it provides a sneak peek into other companies' best practices. This year, we focus on the job seeker experience, because the number one complaint we hear from job seekers is that they never hear back from an employer after they apply. No matter where you post your jobs, you will get many job seekers who just are not a good fit for that particular position. For the most part, however this group of job seekers don't get officially turned down and this creates tremendous job search frustration. It also creates a self-propelled problem that rebounds on itself, as job seekers who aren't explicitly turned down or given feedback will continue to apply to jobs they aren't qualified for and may start to feel more desperate or hopeless about their search. So, we asked companies what they are doing about the candidate experience and here are some of their responses:

- We send an automated response for all applicants, and custom responses for applicants who interview with us.
- We ensure that we treat every candidate like a valued customer.
- Candidates get an email confirming receipt of application. Candidates with incomplete application are emailed back to login and complete application.
- We believe in personally sending candidates a thank you letter.
- Our company sends a letter if we are not moving forward with the candidate.
- An automated rejection letter is sent via the applicant tracking system for any candidate we don't interview.
- We add a candidate's resume to our database for potential future hire, and send them a letter or an email letting them know that.
- Our company calls them, and if they aren't available we leave a message.

Additionally, some companies responded to this question in ways that showcase the limits of an HR Department overwhelmed with candidates. Here are two answers to this question that are emblematic of many others' experience:

- We'd love to respond to everyone but just don't have time. If they reach out to us, we will usually let them know they are not getting an interview.
- We get so many unqualified applicants, we are not sure if they read the job descriptions. We don't feel like we even need to respond to these individuals, since they are applying to jobs and don't have any of the experience. This sounds bad but how can they be a great employee if they can't even read a job description?

Most companies do have an automated response confirmation email when a candidate applies to their jobs. Some companies use this form to let the job seeker know what the steps are in their hiring process and what they can expect. These are great first steps.

Some job seekers apply to anything and don't expect to hear anything back. However, despite the HR Department's point of view, the frustrated job seekers we hear from are the ones who think they do qualify for an opening and never hear back. Job seekers tell us that some job descriptions are poorly written or not clear on exactly what the daily tasks are for the position. Employers must realize that these job seekers could be your customers, stock holders, fans or future employee referral partner. If

you can reach out to this group and update them on their status, this will go a very long way in establishing your employer brand and set yourself apart from many companies. Providing feedback in this way will also help you build your future employee pipeline.

The one company that said “we ensure we treat every candidate like a valued customer” is the simplest way to add your magic to the job seeker experience!

“We are always surprised how many job seekers apply who are not even close to what we are looking for. While we like to reach out to them and let them know this, we just simply don’t have the manpower.” Surveyed Employer

ANALYSIS

THE ORLANDO MSA JOB MARKET IS LEADING THE NATION IN HIRING AND IT WILL NOT SLOW DOWN IN 2017 CREATING A CHALLENGING HIRING ENVIRONMENT

Now in our ninth year of doing this survey, we have seen it all when it comes to hiring in Central Florida. The great recession of 2007 saw the construction industry lose close to half of their jobs (85,000 to 46,000). Then in 2016, construction industry hiring was one of Orlando MSA’s leaders, adding over 6,500 jobs, however still short 15,000 jobs from pre-recession levels.

The construction industry is the perfect canary in the coal mine because it showcases what is coming down the pike. *Orlando is becoming a major city.* As a matter of fact, the Orlando MSA was the No. 1 city for job gains in [2016 adding over 53,000 jobs](#), in a pool of cities with at least one million people. What makes this exciting is we are seeing growth in old and new sectors alike that are creating higher paying jobs.

Why is Orlando really becoming a major city?

Our local [Economic Development Commission](#) has a saying that is so true: “Orlando, you don’t know the half of it.” This may have been designed for the rest of the world, but it holds true to longtime residents of the area as well, many of whom have no idea why it just feels different in this city. We are seeing tremendous growth in our technology sector, medical and military simulation industry, healthcare, aerospace, aviation, ports, advanced manufacturing and life sciences. Most of the jobs in these sectors have starting pay of \$60-\$90,000 per job.

Orlando is rebuilding its infrastructure with the \$2.3 billion [Ultimate I-4 project](#), the [408 project](#) and the [\\$1.8 billion Intermodal Terminal Facility](#) project at Orlando International Airport, all of which will help support our population growth and visitor traffic. Our theme parks are always building, currently

Universal is in the midst of a huge project building its new water park called *Volcano Bay* and just opened up its newest resort hotel called Sapphire Falls. Disney will open *Pandora-The World of Avatar* this year as well. We had more than 60 million visitors to Central Florida in 2016, which is exciting.

Employers involved in this survey are looking for some high value candidates, and a lot of them. Engineers, sales professionals, pipe fitters, coders, marketing specialists, nurses, accountants, teachers, website developers and so many more across all sectors. Many of these jobs also reside in our hospitality and leisure industry. During the 25 years OrlandoJobs.com has in the staffing and recruiting industry, the prevailing thought from outsiders was that Orlando just has low paying jobs. What many who subscribed to that belief failed to realize was that our leisure and hospitality industry is a fantastic starting ground for those entering the workforce and a great place for our baby boomers looking for some fun, relatively easy work. Orlando is also a place for thousands of professional jobs and a career path for so many Central Floridians. An all-time record 252,400 people work in Central Florida's largest employment sector: hospitality.

Professional sector jobs also hit an all-time record, topping 211,000. In 2016, 10,000+ jobs were added in this sector, which is made up of higher paying salaried jobs. This growth has challenged our surveyed employers since many of these jobs need college degrees, experience and special skill sets. Companies have also had to reconfigure their compensation and benefits plans to be competitive for the best talent.

The Central Florida Employment Outlook is great. For job seekers or anyone reading this report the main takeaway is this: if you are looking for a great place to live and work, Central Florida employers want to talk with you. With more than [2.3 million residents](#) in the Orlando region, 2016 saw a 2.6% increase in our population, or 60,000 new net residents. Every day, Orlando adds more than 100 new residents, a trend that is not slowing down. For companies, this is great news especially if a portion of our new residents are nurses, electricians, bartenders, project managers, engineers and bus drivers.

We thank all employers who participated in this survey. The opportunity to peek behind the curtain to see what is really happening in the employment marketplace is invaluable information for employers and job seekers alike.

The "Orlando, You Don't Know the Half of It" slogan is accurate. Orlando is a vibrant city on the brink of really showing the world we are leaders in technology, healthcare, medical/military simulation and health sciences, along with our world-renowned reputation as the best in tourism and hospitality. The employers in this survey predict over 24,000 jobs will be added at their companies in 2017. That's a lot of opportunity!



OrlandoJobs.com is a sponsor of the HR Florida Conference every year. (HRFlorida.org)



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ABOUT ORLANDOJOBS.COM

OrlandoJobs.com, part of the Great Job Spot Network, is the powerful, pre-eminent career platform in Central Florida, and the only digital job board optimized for mobile, on-the-go usage by jobseekers. With more than 100,000 visitors per month, and over 2,400 employers, there is no better place to find a job. The site was founded in 2005 by Roger Lear and Scott Kotroba, and is the official employment website of the Great Orlando Society of Human Resources (www.GoSHRM.com). OrlandoJobs.com's sister company, the GreatInsuranceJobs.com Network, is the leading insurance employment network in the nation. The OrlandoJobs.com and Great Job Spot Network proudly partner with and power the career centers on OrlandoWeekly.com, [GOSHRM](http://GOSHRM.com) and WKMG Local 6 ClickOrlando.com.

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All previous Central Florida Employment Outlooks are located at OrlandoJobs.com/jobreport

