



2020

# WORKFORCE STUDY

NEW BRAUNFELS, TEXAS

*New Braunfels*  
**EDC**

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HD SUPPLY IS A  
MAJOR EMPLOYER  
WITH OVER 500  
EMPLOYEES.



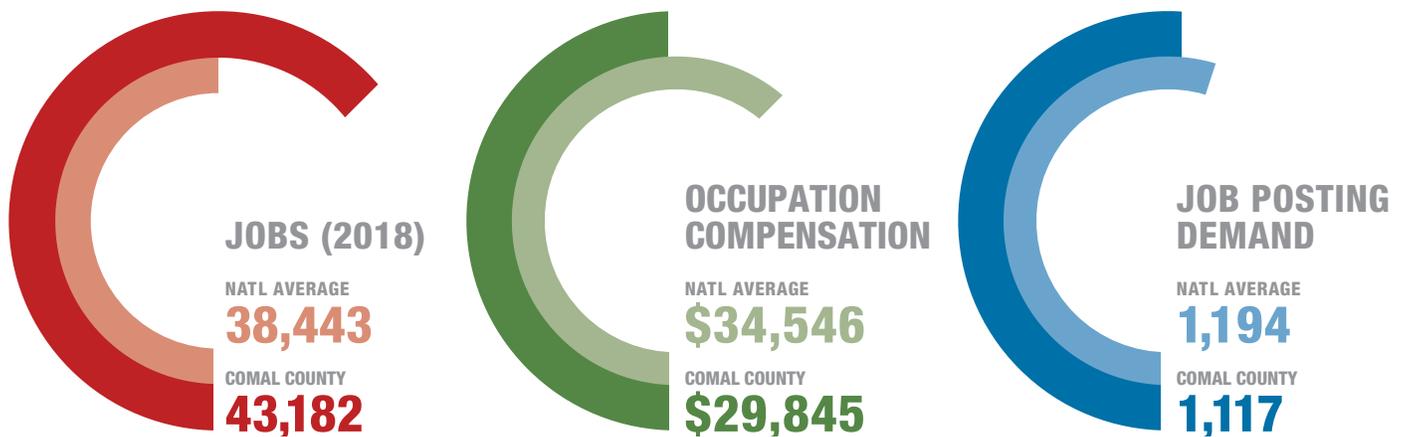
# EXECUTIVE SUMMARY

The 2020 Workforce Study gives a glimpse into the strengths and needs of Comal County’s diverse economy and effects on workforce in relation to surrounding municipalities. The study resulted in a few unexpected variables and serves as a basepoint to document these indices in future years.

Some lessons learned include:

## AVERAGE JOB POSTING DEMAND OVER A DEEP SUPPLY OF REGIONAL JOBS

Comal County, TX is a hotspot for primary employer jobs. While the national average for an area the size of the county is 38,443 employees, there are 43,182 employees in Comal County. The national median salary for occupations is \$34,546, compared to \$29,845 in the county. Earnings are slightly lower in Comal County, TX but represent a stable, economical workforce. Job posting activity is near average in Comal County, TX. The national job posting average for an area the size of Comal County is 1,194 job postings per month, locally the actual postings number is 1,117.



Source: EMSI/Occupations/Occupation Overview

## REGIONAL EMPLOYMENT IS HIGHER THAN THE NATIONAL AVERAGE

Nationally, the average is 38,443 jobs, while there are 43,182 jobs in Comal County. This higher than average supply of jobs may make it easier for workers to find employment in Comal County. Since tourism is a chief industry in Comal County, the higher number of jobs per capita can be attributed to the large supply of retail and tourism industry jobs that are predominantly low wage and employ large numbers of people.



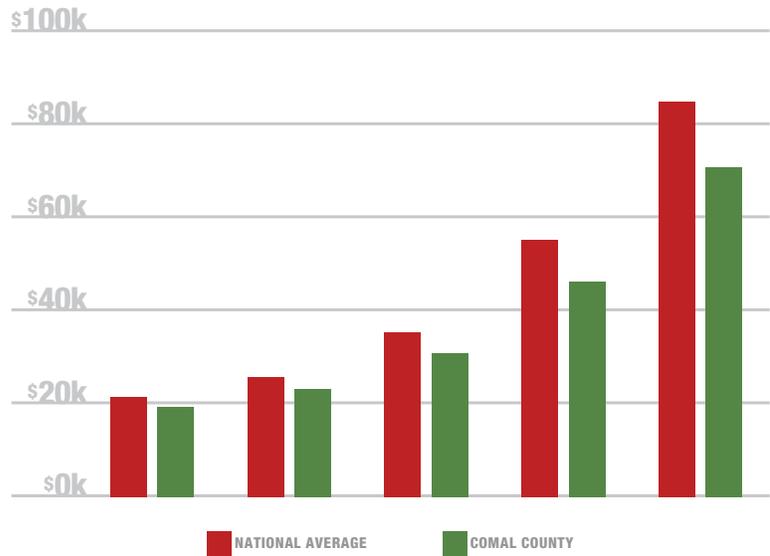
	2018 JOBS	2019 JOBS	CHANGE	% CHANGE
New Braunfels	33,577	34,152	575	1.7%
Comal County	43,182	43,948	766	1.8%
National Average	38,443	39,165	723	1.9%

Source: EMSI/Occupations/Occupation Overview

## COMPENSATION

### REGIONAL COMPENSATION IS 14% LOWER THAN THE NATION

For occupational average compensation, the 2018 median wage in Comal County, TX was \$29,845, while the national median wage was \$34,546. Local employers can benefit from lower, more economical occupational wages in Comal County and surrounding areas. While the high volume of those employees may come from the retail and tourism industry jobs, most of the skills gained can be transferable to any industry.



Source: EMSI/Occupations/Occupation Overview



AS ONE OF THE LARGER INDUSTRIES, CONSTRUCTION EMPLOYS MORE THAN 5,000 PEOPLE.  
*(BYRNE CONSTRUCTION)*



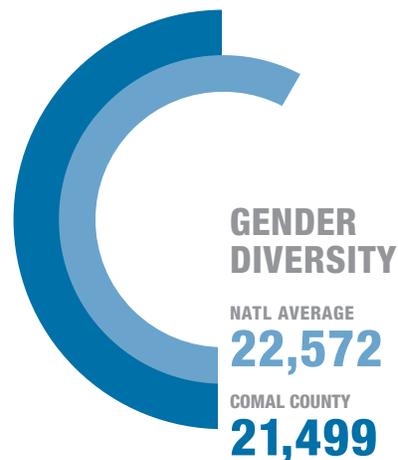
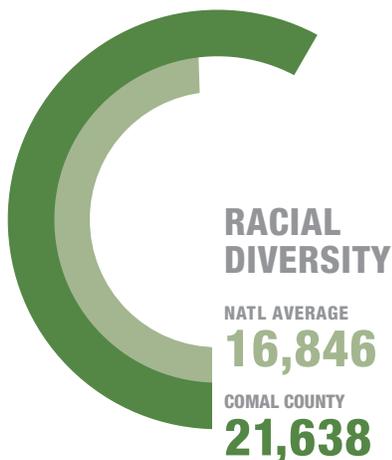
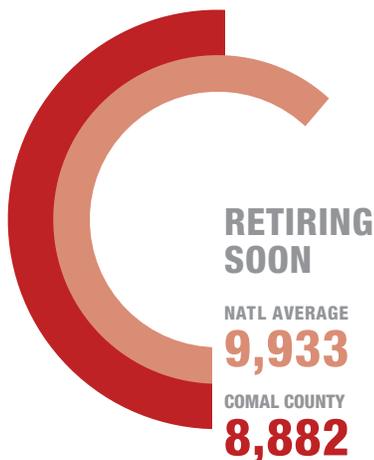
TEXAS TITO'S  
STAFF HELPS  
LOAD THEIR  
FAMOUS DILL  
PICKLES FOR  
DISTRIBUTION.

## DEMOGRAPHICS

### RETIREMENT RISK IS LOW, WHILE OVERALL DIVERSITY IS HIGH

Retirements are a lower risk in Comal County, TX. The national average for an area the size of Comal County is 9,933 employees 55 or older, while there are 8,882 locally. Employers here seldom face the challenge of losing critical knowledge and skills from tenured employees while trying to increase productivity.

Racial diversity is above the national average in Comal County, TX. The national average for an area the size of Comal County is 16,846 racially diverse employees; Comal County's average is 21,638. Additionally, gender diversity is near average in Comal County, TX. The national average for an area of Comal County's size is 22,572 female employees. There is an average of 21,499 here in Comal County.

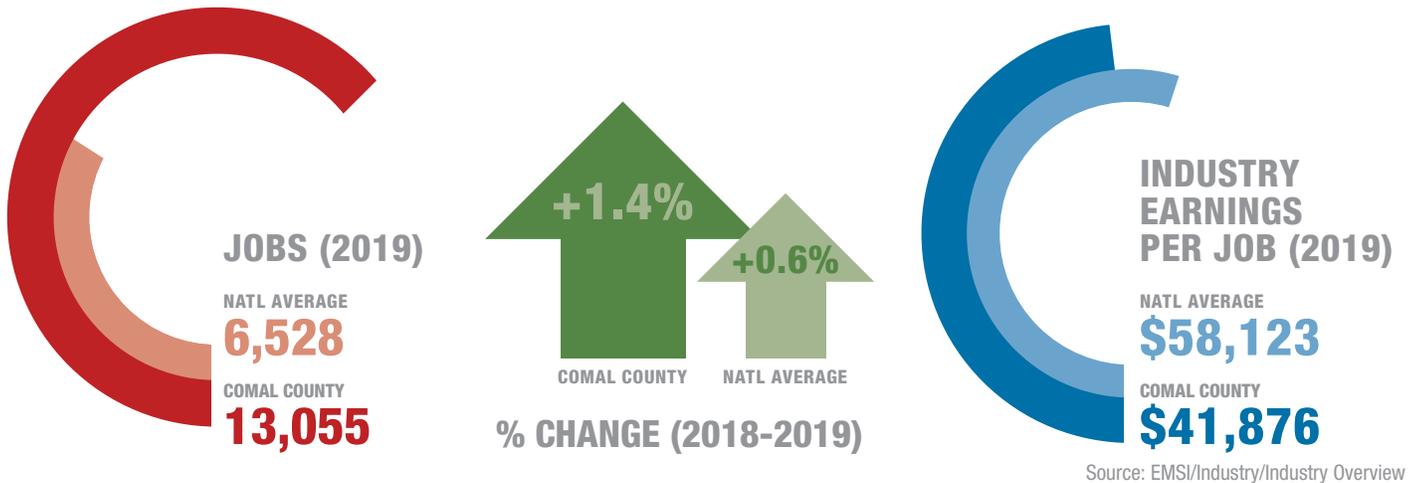


Source: EMSI/Occupations/Occupation Overview

# INDUSTRY

## INDUSTRY SUMMARY FOR LOCAL PRIMARY EMPLOYERS

For Comal County, the 13,000+ jobs within the primary industries collectively outweigh the national average by 50%. As previously mentioned, this is due to the greater number of employees in the retail trade and tourism trade. The medical industry in Comal County is the second largest employer. The addition of Resolute Health Hospital in 2014 more than doubled the number of healthcare employees in the region.



## REGIONAL TRENDS

Regional trends track job growth as a leading indicator. These indicators compare Comal and Guadalupe Counties against the region and state. Job growth change for New Braunfels is growing alongside the region but outpacing the county, the neighboring county and Texas as a whole. The region and Texas are anomalies compared to other regions located within the United States.

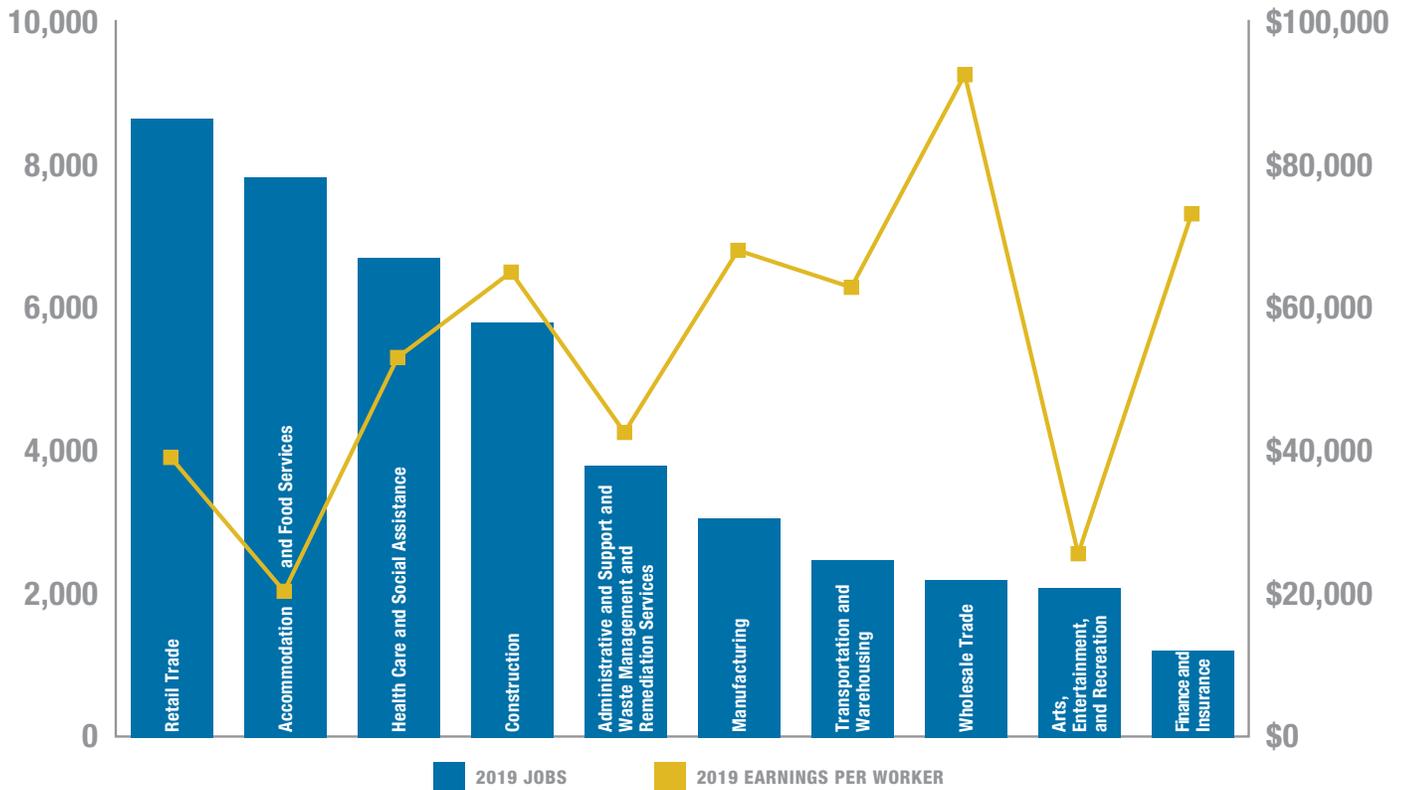


	2018 JOBS	2019 JOBS	CHANGE	% CHANGE
Region	12,879	13,055	176	1.4%
New Braunfels	11,077	11,204	127	1.1%
Texas	1,793,558	1,805,014	11,456	0.6%
Comal and Guadalupe Counties	21,196	21,308	112	0.5%

Source: EMSI/Industry/Industry Overview

## INDUSTRY GROUP JOBS AND EARNINGS COMPARISON

Comparing primary industry jobs and earnings in Comal County, the utilities trade appears to provide the highest wages, followed by wholesale trade, oil & gas, and manufacturing; while the retail trade supplies the highest number of jobs. The construction industry has the largest number of employers and employs the 3rd highest number of employees. Earnings in the construction industry are nearly half of the utilities trade.



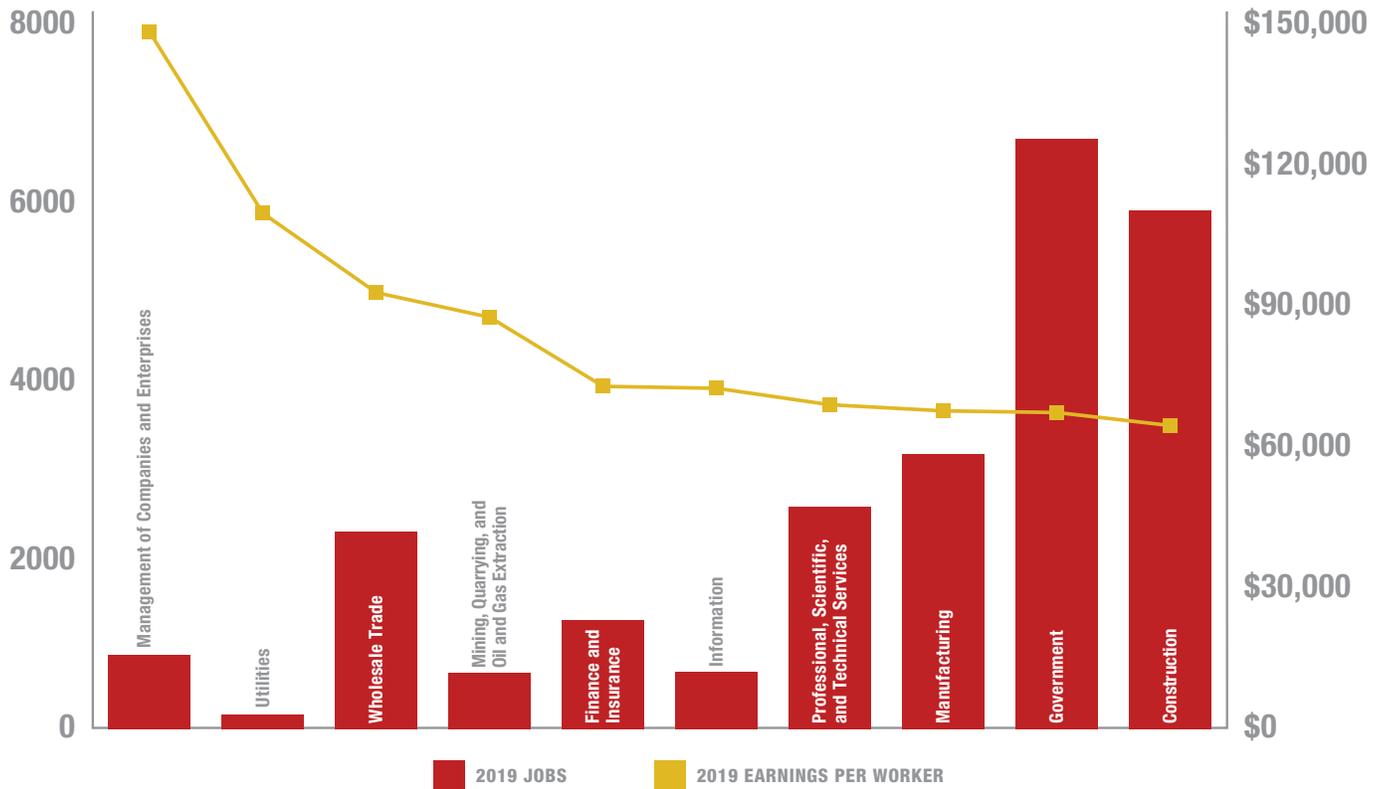
GROUP	2018 JOBS	2019 JOBS	EARNINGS PER WORKER	ESTABLISHMENTS
Retail Trade	8,516	8,663	\$39,428	458
Accommodation and Food Services	7,711	7,849	\$20,644	337
Health Care and Social Assistance	6,602	6,714	\$53,452	359
Construction	5,659	5,809	\$65,435	508
Administrative and Support and Waste Management and Remediation Services	3,796	3,811	\$42,937	246
Manufacturing	3,023	3,076	\$68,494	153
Transportation and Warehousing	2,357	2,489	\$63,302	90
Wholesale Trade	2,261	2,206	\$93,138	211
Arts, Entertainment, and Recreation	2,059	2,091	\$25,916	82
Finance and Insurance	1,149	1,216	\$73,605	228
Information	650	641	\$73,200	34
Mining, Quarrying, and Oil and Gas Extraction	629	630	\$88,003	28
Utilities	152	166	\$109,672	13

Source: EMSI/Industry/Industry Comparison

# OCCUPATIONS

## TOP 10 HIGHEST-PAYING INDUSTRIES

The highest-paid industries in Comal County are management of companies sector, followed by the utilities industry. Additionally, the governmental sector hires the most employees for jobs for Comal County. Digging deeper, it is noteworthy that all of the primary industry earnings per worker are much higher than the average county wage of \$21/hour.

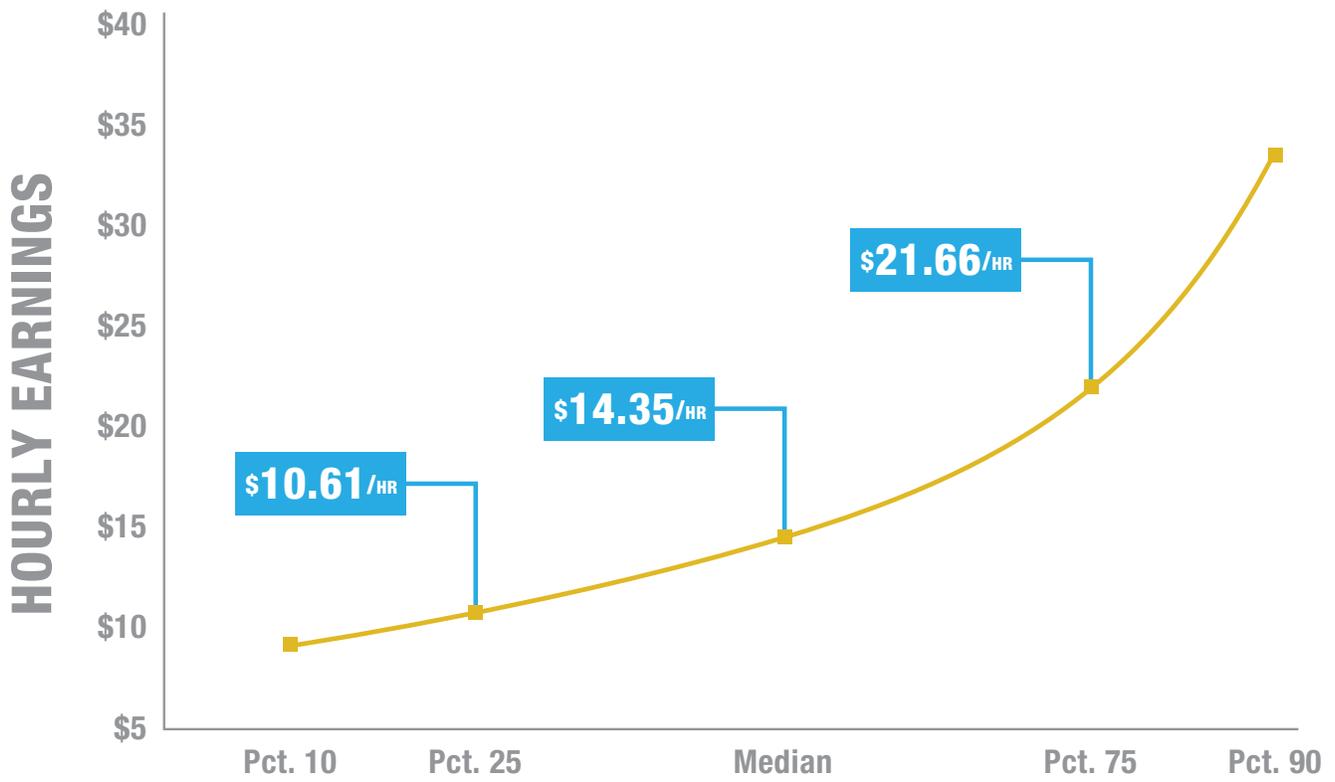


INDUSTRY	2018 JOBS	2019 JOBS	CHANGE IN JOBS (2018-2019)	% CHANGE	2019 EARNINGS PER WORKER
Management of Companies and Enterprises	810	832	22	3%	\$147,480
Utilities	152	166	14	9%	\$109,672
Wholesale Trade	2,261	2,206	(55)	(2%)	\$93,138
Mining, Quarrying, and Oil and Gas Extraction	629	630	1	0%	\$88,003
Finance and Insurance	1,149	1,216	67	6%	\$73,605
Information	650	641	(9)	(1%)	\$73,200
Professional, Scientific, and Technical Services	2,429	2,484	55	2%	\$69,774
Manufacturing	3,023	3,076	53	2%	\$68,494
Government	6,512	6,611	99	2%	\$68,147
Construction	5,659	5,809	150	3%	\$65,435

Source: EMSI/Industry/Highest Ranked Industries

## PERCENTILE EARNINGS SUMMARY

Primary occupations (defined as primary employers within Comal County) collectively are higher than the national average while the wages are slightly below the national average.



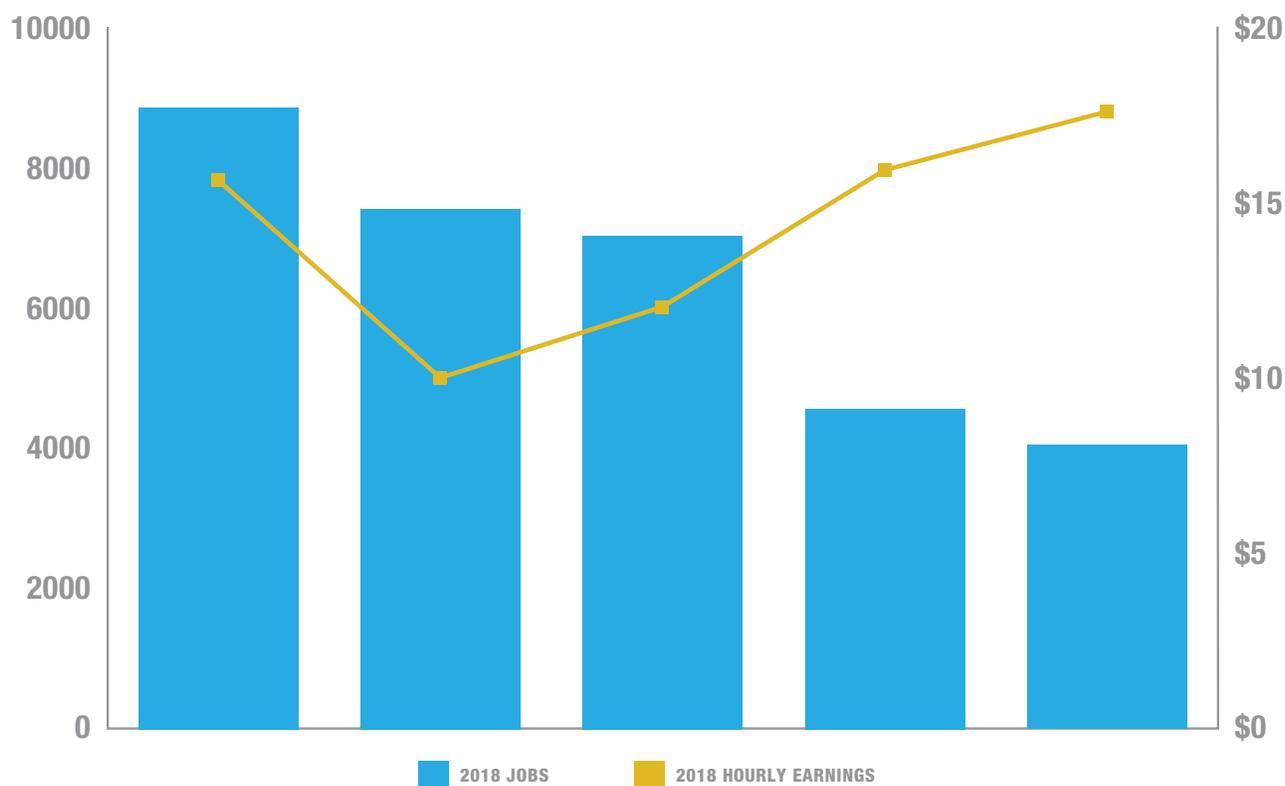
Source: EMSI/Occupations/Occupation Summary

MAINTENANCE AND  
REPAIR STAFF WORK  
ON AN AIRPLANE AT  
THE NEW BRAUNFELS  
REGIONAL AIRPORT.  
(TODDCOE AVIATION)



## OCCUPATION GROUP JOBS AND EARNINGS COMPARISON

Different than the industry group jobs and earnings comparison, the occupation group jobs and earnings comparison compare occupations within an industry rather than an industry as a whole. Occupations determined by the Primary Employer using a NAICS code dataset reveal office and administrative occupations hire the largest number of people while management occupations award the highest salaries. Most notably, Architecture and Engineering occupations have the second-highest salaries.



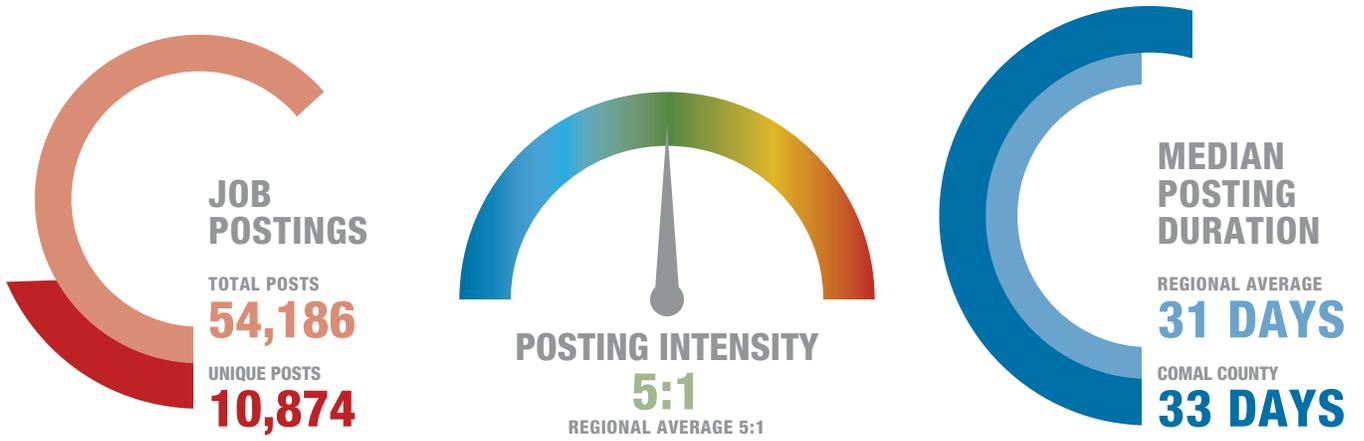
GROUP	2018 JOBS	2019 JOBS	MEDIAN HOURLY EARNINGS
Office and Administrative Support Occupations	8,890	9,015	\$15.69
Food Preparation and Serving Related Occupations	7,441	7,536	\$10.04
Sales and Related Occupations	7,055	7,154	\$12.07
Transportation and Material Moving Occupations	4,583	4,724	\$15.98
Construction and Extraction Occupations	4,063	4,176	\$17.65
Healthcare Practitioners and Technical Occupations	2,763	2,819	\$29.76
Installation, Maintenance, and Repair Occupations	2,735	2,829	\$20.16
Production Occupations	2,624	2,644	\$15.60
Personal Care and Service Occupations	2,598	2,654	\$10.37
Management Occupations	2,243	2,305	\$45.27
Building and Grounds Cleaning and Maintenance Occupations	2,197	2,243	\$12.08
Business and Financial Operations Occupations	1,969	2,028	\$31.12
Healthcare Support Occupations	1,614	1,646	\$13.40
Computer and Mathematical Occupations	855	864	\$35.81
Community and Social Service Occupations	800	815	\$21.41
Arts, Design, Entertainment, Sports, and Media Occupations	785	784	\$19.17
Architecture and Engineering Occupations	666	697	\$32.84

Source: EMSI/Occupations/Occupation Comparison

# JOB

## JOB POSTING OVERVIEW

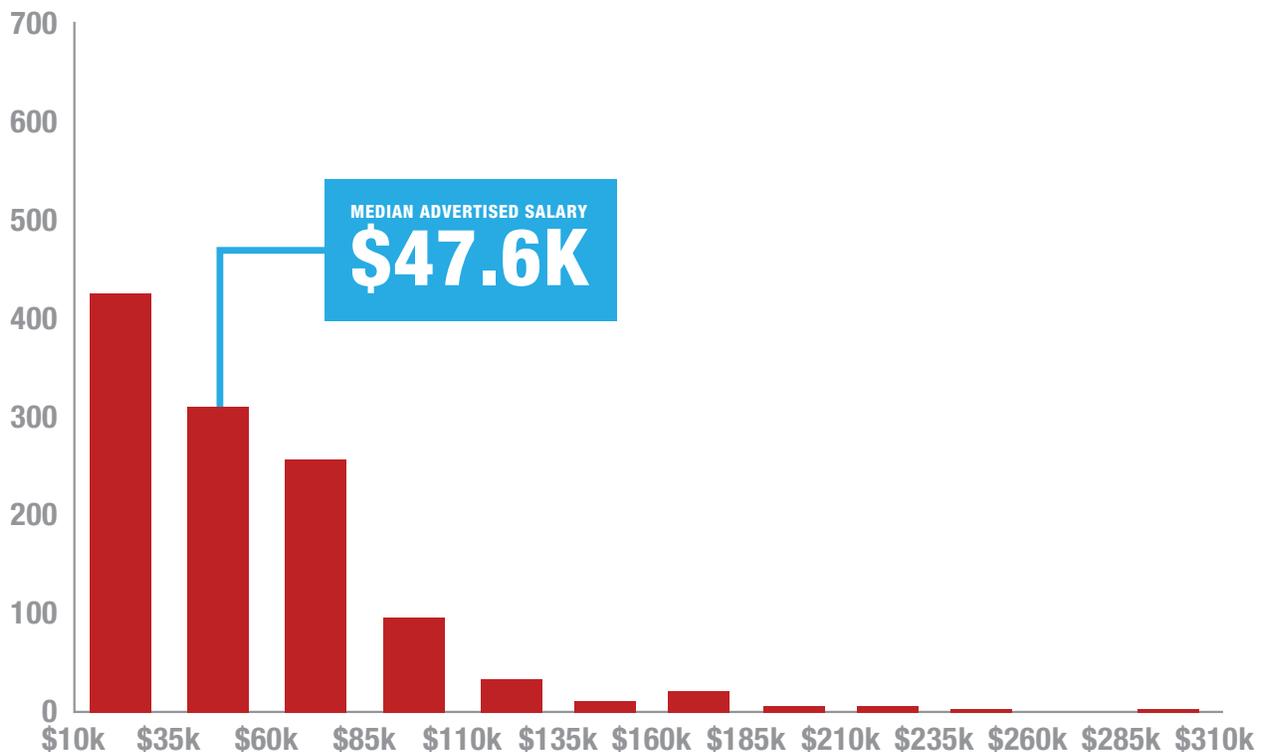
More than 10,000 unique job postings indicate a highly active job market and contribute to the reputation of a quality workforce in New Braunfels and Comal County. In total, there were 54,186 total job postings from February 2019 to August 2019, of which 10,874 of those job postings were unique. These numbers give us a posting intensity of 5:1, meaning that for every 5 postings, there is 1 unique job posting. This is close to the posting intensity for all other occupations and companies located within the region, indicating they are putting average effort toward hiring for this position.



Source: EMSI/Job Postings

## ADVERTISED SALARY

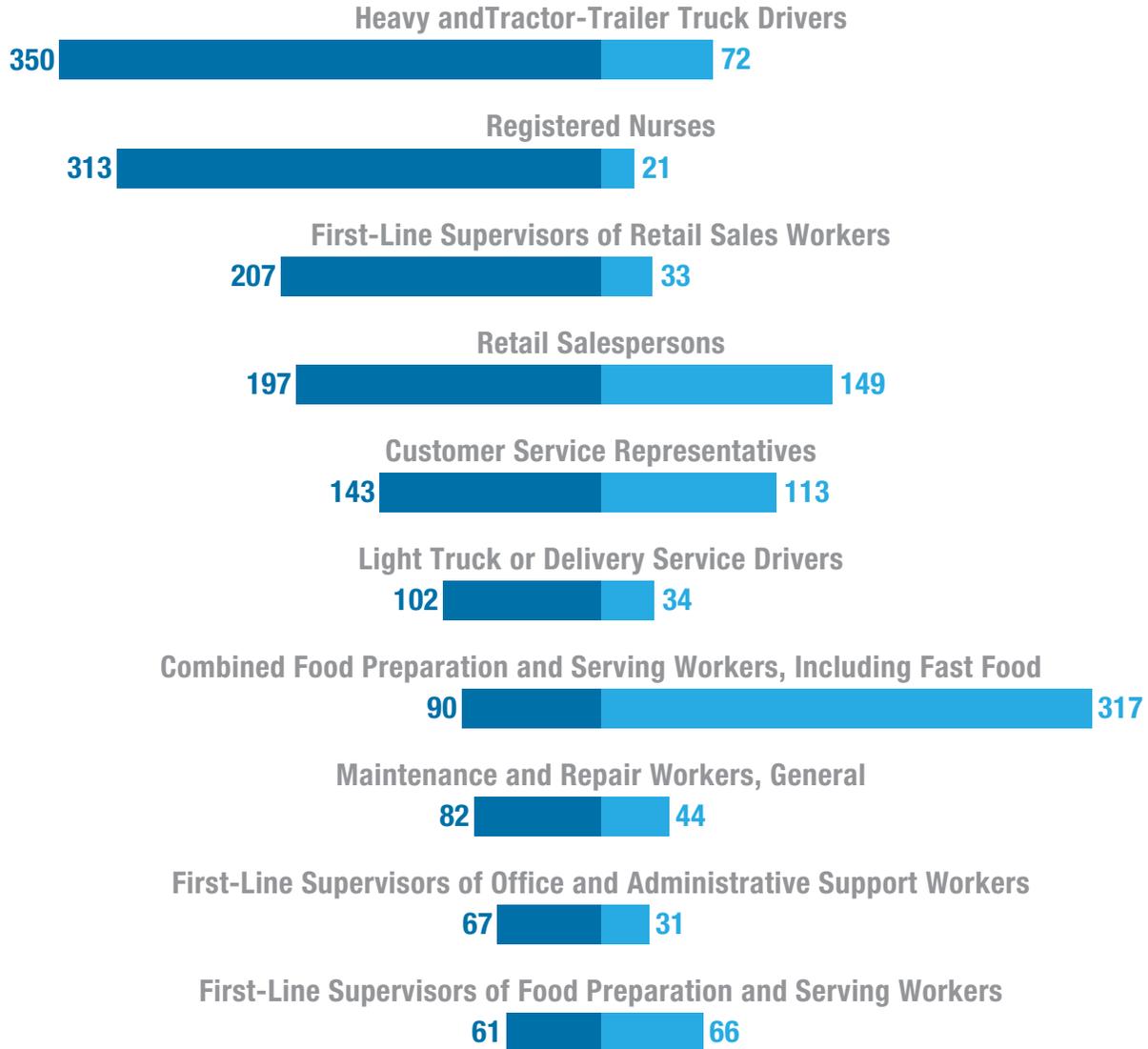
There are 1,792 advertised salary observations (16% of the 10,874 matching postings). More than 700 of these job postings were likely for seasonal positions that support the tourism and retail industries within New Braunfels and Comal County. The majority of salaried positions were for entry-level and skilled positions. The average salary advertised was \$47.6k, well above Comal County's per capita income of \$37,782.



Source: EMSI/Job Postings

## JOB POSTINGS VS. HIRES

In an average month, there were 3,454 active job postings for 152 occupations and 3,754 actual hires. This indicates there was approximately 1 hire for 152 occupations for every 1 active job posting. Heavy drivers and tractor-trailer truck driver jobs had the most advertised while only 20% of the positions were filled, which indicates a shortage within the occupation. Conversely, 61 positions for first-line supervisors for food workers were advertised and 108% of the positions were filled.



Source: EMSI/Job Postings

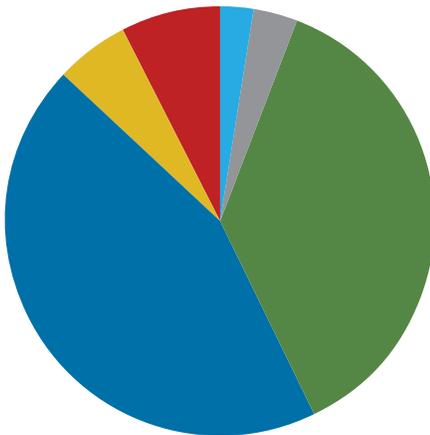


PERSONNEL HELP PACKAGE  
SAUSAGE FOR SHIPMENT AT THE  
NEW BRAUNFELS SMOKEHOUSE.

## INCOMING WORKFORCE/GRADUATES

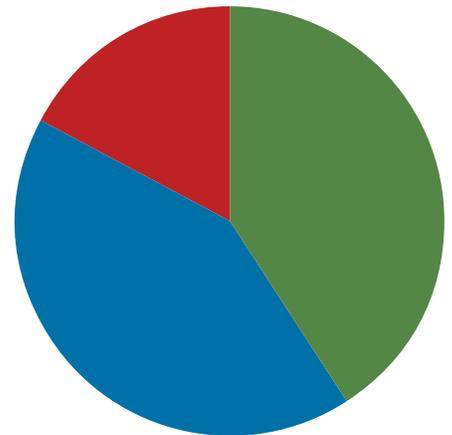
A good indicator of a strong talent pipeline is the number of students who graduate from higher education with a degree/certification or workforce skillset. In 2018, more than 13,000 graduates joined the existing San Antonio-New Braunfels MSA workforce, many of which will make the commute to jobs in New Braunfels or Comal County. Additionally, Comal County has 32% of the population with an educational attainment of a bachelor's or master's degree.

**BACHELOR'S DEGREES**  
TOTAL: 10,876



- UNIVERSITY OF THE INCARNATE WORD (806)
- OUR LADY OF THE LAKE UNIVERSITY (299)
- THE UNIVERSITY OF TEXAS AT SAN ANTONIO (4811)
- TEXAS LUTHERAN UNIVERSITY (338)
- TEXAS STATE UNIVERSITY (4035)
- TRINITY UNIVERSITY (587)

**ASSOCIATE/CERTIFICATE**  
TOTAL: 2,493

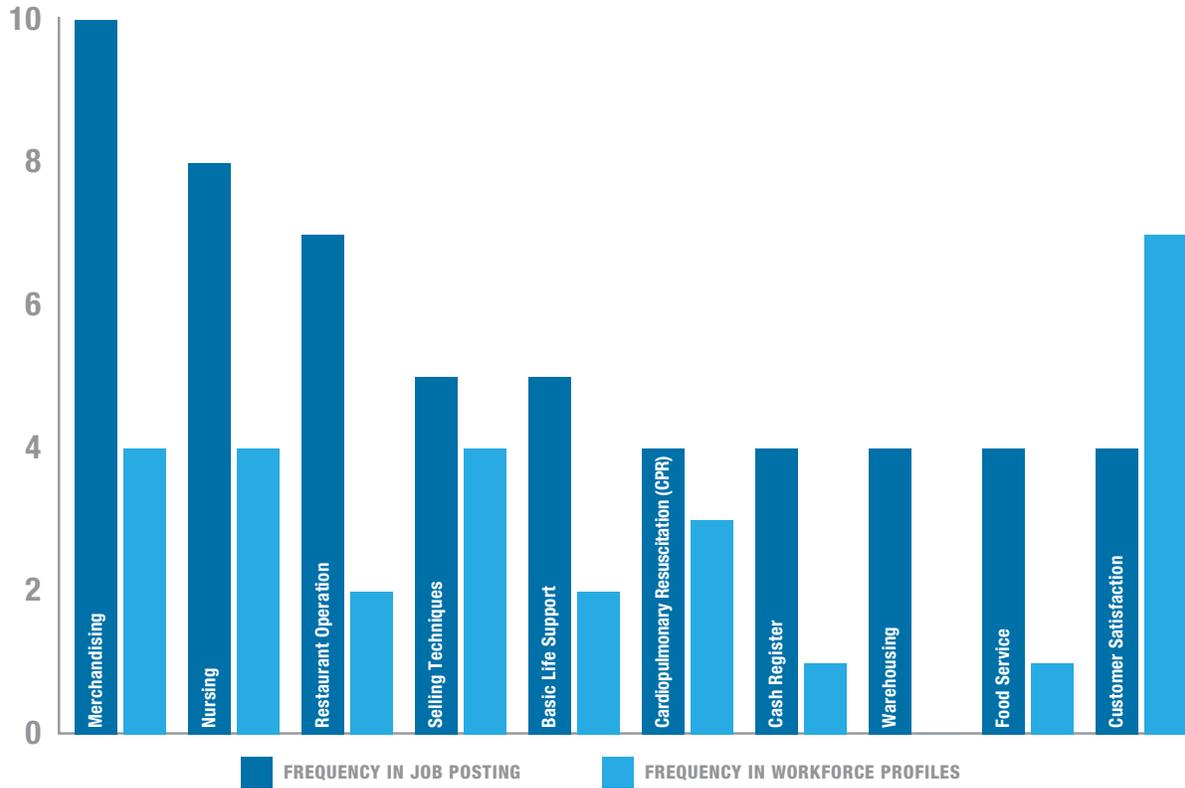


- ST. PHILIP'S COLLEGE (425)
- NORTHWEST VISTA COLLEGE (1019)
- SAN ANTONIO COLLEGE (1049)

Source: IPEDS 2018

## TOP 10 HARD SKILLS

Top Hard Skills provide insight into the supply and demand of relevant workforce skills by comparing the frequency of skills present in job postings against skills present in today's workforce. With retail and tourism industries being a large industry within Comal County, it is no surprise that merchandising is the number one most requested skillset. The medical/healthcare industry is the second-largest industry in Comal County, thereby making nursing occupations and skillsets to be one of the most in-demand within the county.



SKILL	FREQUENCY IN POSTING	POSTING WITH SKILL/ TOTAL POSTINGS (FEB 2019-AUG 2019)	FREQUENCY IN PROFILES	PROFILES WITH SKILL/ TOTAL PROFILES (2018 - 2020)
Merchandising	10%	1,088/10,874	4%	890/20,335
Nursing	8%	883/10,874	4%	714/20,335
Restaurant Operation	7%	733/10,874	2%	495/20,335
Selling Techniques	5%	589/10,874	4%	897/20,335
Basic Life Support	5%	564/10,874	2%	389/20,335
Cardiopulmonary Resuscitation (CPR)	4%	449/10,874	3%	630/20,335
Cash Register	4%	445/10,874	1%	135/20,335
Warehousing	4%	388/10,874	0%	78/20,335
Food Services	4%	387/10,874	1%	235/20,335
Customer Satisfaction	4%	385/10,874	7%	1,482/20,335

Source: EMSI/Job Postings



THE MEDICAL INDUSTRY  
IS ONE OF THE LARGEST  
INDUSTRIES WHILE  
NURSING IS THE 2ND  
HIGHEST REQUESTED  
SKILLSET FOR JOBS.

*(RESOLUTE HEALTH)*



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