

Talent Attraction Scorecard 2025



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History

The Lightcast Talent Attraction Scorecard is now in its **tenth year**. When we released the first edition in 2015, talent attraction was a nascent trend in economic development. Now it's a bedrock priority..

The 2025 Talent Attraction Scorecard continues to underscore the competitive and dynamic nature of talent attraction. This year's edition shows how a variety of factors drive talent mobility, including:

- **Demographic changes**
- **The rise of remote work**
- **Worker preferences around lifestyle and affordability**
- **Financial advantages that some regions offer**

This report explores both the broad trends and the unique conditions that propel certain high-performing regions to the top of the rankings.

Methodology

How We Measure Talent Attraction

Lightcast measured talent attraction across all 50 states (plus Washington, DC) and more than 900 Census-designated metropolitan and micropolitan areas.

Regions are broken down by population size:

- **Large MSAs:** 250K+ (192 areas)
- **Mid-Sized MSAs:** 100K–250K (200 areas)
- **Small MSAs:** 50K–100K (209 areas)
- **Very Small MSAs:** 10K–50K (319 areas)



Rankings are based on **seven components** of equal weight:



Overall Job Growth

The 2019–2024 percent job change for all wage-and-salary employees



High-Earning Job Growth

2019–2024 growth in the top 200 US occupations by average earnings.



Blue-Collar Job Growth

Growth of blue-collar jobs: skilled trades, manufacturing, protective services, etc.



Competitive Effect

Indicates growth above or below expectation due to a region's unique competitive advantages, rather than overall national or industry-wide trends



College-Ed. Pop. Growth

Increase of the size and share of the population with an associate's degree+.



Attraction of Earners

The 2018–2023 annual per-capita attraction of workers making \$25K+/year



Prime-Age Population Growth

The 2018–2023 annual per-capita attraction of prime-age people, aged 25–54.

How to use the Talent Attraction Scorecard

Read up on the 6 major trends shaping talent attraction in the US:

- Learn which factors are making the biggest impacts
- Dig into the advantages and risks associated with each trend
- Discover how your own region stacks up against the rest—overall and for each of our seven metrics

Take a talent-attraction road trip through all 975 regions we analyzed:

We provide full rankings for:

- All 50 states, plus Washington, DC
- All 924 metro areas, across every size category
- Plus separate size-specific rankings for Large, Mid-Size, Small, and Very Small metro areas for apples-to-apples regional comparisons.

Top 10 Lists



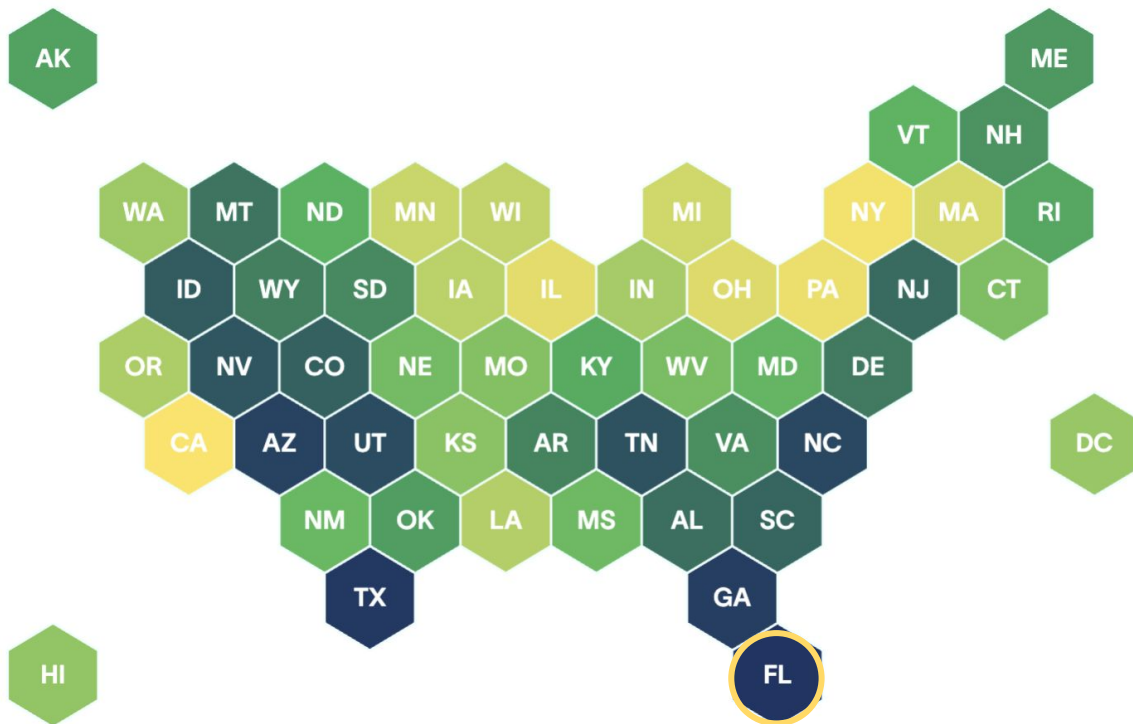
- #1** Florida
- #2** Texas
- #3** Idaho
- #4** Wyoming
- #5** Nevada
- #6** District of Columbia
- #7** Arizona
- #8** Delaware
- #9** Utah
- #10** Montana

Talent Attraction Insights for Florida

#1
Overall
Florida

Ranking by Metric:

Overall Job Growth	#1
High-Earning Job Growth	#3
Blue-Collar Job Growth	#2
Competitive Effect	#1
College-Educated Pop. Growth	#6
Attraction of Earners	#18
Prime-Age Pop. Growth	#16



Top 10 Lists



**Large
MSAs**

**Population:
250K+**

- #1 Dallas-Fort Worth-Arlington, TX**
- #2 Austin-Round Rock-San Marcos, TX**
- #3 Miami-Fort Lauderdale-West Palm Beach, FL**
- #4 Orlando-Kissimmee-Sanford, FL**
- #5 Crestview-Fort Walton Beach-Destin, FL**
- #6 Houston-Pasadena-The Woodlands, TX**
- #7 North Port-Bradenton-Sarasota, FL**
- #8 Tampa-St. Petersburg-Clearwater, FL**
- #9 Lakeland-Winter Haven, FL**
- #10 Naples-Marco Island, FL**

Talent Attraction Insights for Orlando

Large MSA (250K+) Rankings:  #1 #99 #196

#4

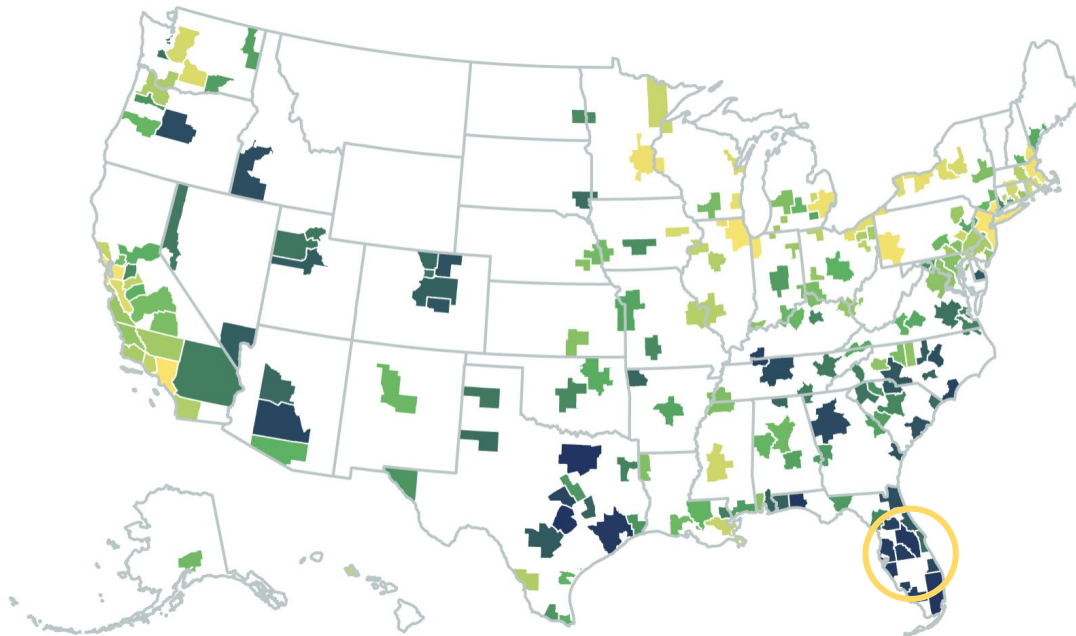
Overall

Orlando-Kissimmee-Sanford, FL

LARGE MSA RANKINGS:

Overall Job Growth	#15
High-Earning Job Growth	#16
Blue-Collar Job Growth	#32
Competitive Effect	#7
College-Educated Pop. Growth	#42
Attraction of Earners	#35
Prime-Age Pop. Growth	#24

Source: [Lightcast](#)



Top 10 Lists



Mid-Sized MSAs

100K–250K

- #1** Wildwood-The Villages, FL
- #2** St. George, UT
- #3** Cheyenne, WY
- #4** Panama City-Panama City Beach, FL
- #5** Punta Gorda, FL
- #6** Anderson Creek, NC
- #7** Jacksonville, NC
- #8** Bozeman, MT
- #9** Sebastian-Vero Beach-West Vero Corridor, FL
- #10** Coeur d'Alene, ID

Talent Attraction Insights for The Villages

Mid-Sized MSA (100K–250K) Rankings:



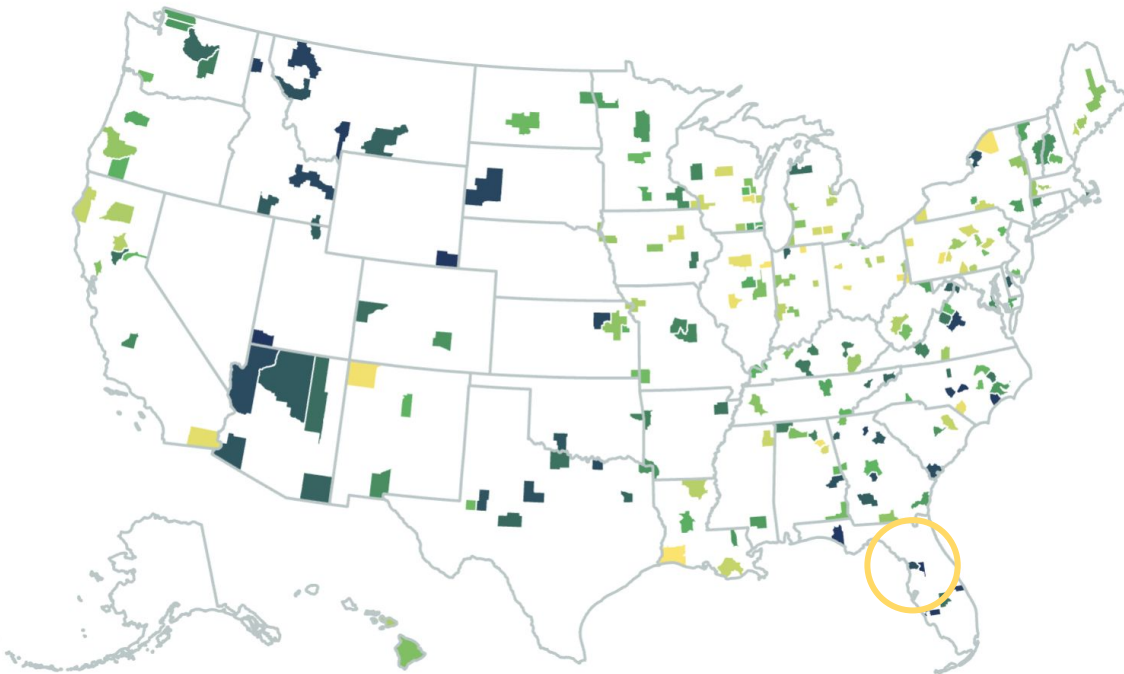
#1

Overall

Wildwood-The Villages, FL

MID-SIZED MSA RANKINGS:

Overall Job Growth	#1
High-Earning Job Growth	#14
Blue-Collar Job Growth	#2
Competitive Effect	#4
College-Educated Pop. Growth	#6
Attraction of Earners	#4
Prime-Age Pop. Growth	#44





KEY TRENDS



Crafting a future-ready talent attraction strategy is like navigating the open road.

The Talent Attraction Scorecard provides the map.

Talent attraction looks different for every region, but we've identified **six overall trends** that have shaped this year's rankings.

The 2025 Talent Attraction Scorecard reveals a complex ecosystem where talent mobility is shaped by intersecting forces: shifting demographics, the rise of remote work, evolving worker preferences for lifestyle and affordability, and the nuanced financial incentives that distinguish certain regions for both individuals and businesses.

TAKEAWAY 1

The Sunbelt and Mountain West Dominate Talent Attraction

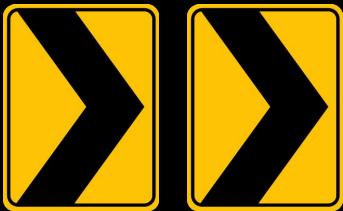
The top 3 large metros are Sunbelt stars:

#1 Dallas, TX • **#2** Austin, TX • **#3** Miami, FL



With strong performance in every edition of the TAS, the Sunbelt and Mountain West are the clear talent attraction leaders of the past decade. These economies have matured to develop top-ranking competitive effect and job growth in diverse sectors—from tech to manufacturing to logistics.

Only three of the top 50 highest-ranking regions fall outside of these regions.



How Lightcast Can Help



Developer: Gain insights into your region's economic and workforce strengths.

USE CASE: With data from Developer, Employ Prince George's built a compelling case for investment—unlocking \$6M in funding and transforming services for local businesses and residents.



Gazelle: Identify growing companies that need the talent your region offers.

USE CASE: Florida's Great Northwest leveraged Gazelle to target fast-growing businesses, helping secure \$75 million in investment.



Talent Migration Dashboard: Discover where talent is coming from or moving to, including which industries and occupations they work in.

USE CASE: Action Greensboro used these insights to uncover key migration patterns and build an award-winning talent attraction strategy.

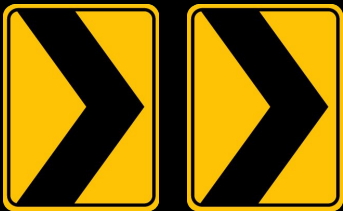
TAKEAWAY 2

An Aging Population Creates Short-Term Gains, but Long-Term Risks

The movement of the older population into retirement destinations has dramatically increased labor market demand in those areas.

Job growth in retirement-destination MSAs tends to be concentrated in industries like Healthcare, Retail Trade, and Accommodation and Food Services, which are associated with serving older populations. **Attracting younger workers and engaging older workers are keys to long-term success.**





How Lightcast Can Help



Developer: Identify overall retirement risk for a region, aging within occupations and industries, and offers customized maps to show age demographics down to the local level.



The “Demographic Drought” Report Series: We coined this term to describe the declining availability of working-age talent due to falling birth rates, aging populations, and shifting labor force participation. Our most recent report, ***The Rising Storm***, explores new talent shortfalls hitting the US by the end of the decade, and how the labor market can respond proactively.



Custom Analysis: Commissioned by local partners, Lightcast released a specialized Demographic Drought outlook for the state of **Minnesota**. This kind of customized analysis is available for any region through Lightcast Professional Services.

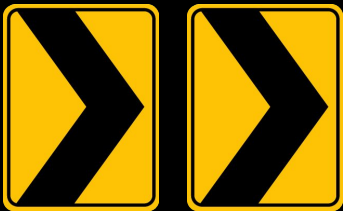
TAKEAWAY 3

Quality of Life and Affordability Drive Talent Attraction

Recent remote-work migration is transforming local economies.

Remote work has become a fixture in the post-pandemic labor market, and mid-sized MSAs in particular are seeing a recent influx of remote workers seeking more affordable living, beneficial policies, and attractive surroundings.





How Lightcast Can Help



Developer: Research broader regional trends, including remote work density, commuting patterns, and the relationship between remote work and local economic development. Developer also provides a Cost of Living Index for every county, metro region, and state, so you can benchmark affordability against competing regions.



Profiles and Job Postings Datasets in Developer: Identify where remote workers are concentrated by comparing company dynamics. See whether remote workers are already in your region, or whether employers in your region are listing remote positions to hire people from outside your area.



Talent Migration Dashboard: See where new residents, including remote workers, are coming from, what experience they bring, and what careers they're pursuing. Then tailor attraction strategies and infrastructure investments to support incoming talent.

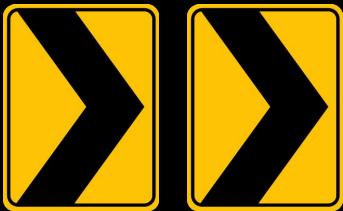
TAKEAWAY 4

Talent Magnets Still Can't Find Enough Blue-Collar Workers

Many communities are adding prime-age talent without adding enough blue-collar workers.

Rapid growth in white-collar sectors also boosts demand for electricians, plumbers, construction crews, machine operators, truck drivers, etc. Yet despite overall population growth in many metro areas, employers continue to report these blue-collar roles are increasingly hard to fill. Ongoing success requires **addressing this lopsided talent growth**.





How Lightcast Can Help



Developer: Identify in-demand skills and occupations to understand which blue-collar roles are most critical in your region and demonstrate regional employer needs to educational partners who can help build effective training programs for these careers.



Analyst: Colleges can access this same kind of data in to proactively develop programs aligned with demand in the skilled trades.



Custom Sector Analysis: Discover the specific competencies employers need most, enabling you to align vocational education, apprenticeships, and community college programs with actual job requirements. This data can strengthen collaborations between employers, unions, and educational institutions. It can also help regional leaders demonstrate ROI to potential partners and build compelling cases for apprenticeship programs that address your region's most pressing blue-collar shortages.

TAKEAWAY 5

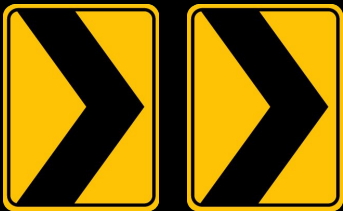
If You Built I.T., They Will Come

Tech job growth is drawing diverse talent from around the country.



Legacy tech centers like San Jose and Seattle have fallen in their talent-attraction rankings as tech-magnet newcomers like Miami, Raleigh, and Provo take their place in the top 50.

Information technology capabilities can layer onto nearly any sector, and when they are, they create the kind of regional momentum that attracts skilled workers and helps drive balanced economic growth.



How Lightcast Can Help



Custom Sector Analysis: Lightcast can identify emerging and in-demand skills based on billions of job postings, which enables reliable and actionable strategies based on real-world demand, not hypothetical projections. These precise terms enable efficient and effective strategies to recruit specific, high-impact skills and occupations.



USE CASE: Lightcast experts worked with the **Detroit Regional Chamber** to develop a custom definition of the Advanced Mobility sector, focused on the next generation of transportation, and identify sector-specific talent gaps. These findings are informing investments in education, workforce, development, work-based learning, and credentialing.



USE CASE: Lightcast has also created a proprietary list of artificial intelligence skills, alongside the **Stanford University Center for Human-Centered AI**. This powers our own research and also enables others to quantify and plan for future readiness around AI.

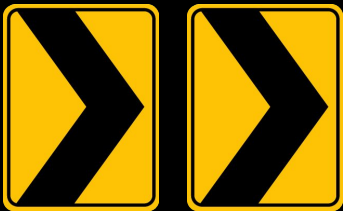
TAKEAWAY 6

Anchor Institutions and Impending Vulnerability

Anchor institutions attract workers, but an economy concentrated around one major player can carry risks.



Major anchor institutions—such as universities, hospitals, military bases, and corporate headquarters—play a complex role in regional talent attraction. They can draw large numbers of new workers, but institutional headwinds can ripple through a whole region. **Building a more diversified economy** can help make a community less susceptible to downturns in a single industry.



How Lightcast Can Help



Economic Impact Studies: Quantify the importance of anchor institutions to regional economic vitality and anticipate changes in job count, revenue, and taxes associated with it. USE CASE: The Alabama Community College System found that it has a \$6.6B annual impact, supporting 1 out of every 27 jobs in the state, and an ROI of \$1.40 for every tax dollar.



Alumni Pathways: Measure students' job readiness to meet regional talent needs. USE CASE: The University of Louisiana System and the University of Nevada, Las Vegas use this data to align their programs with employer and industry demands.



Industry Diversification Insights: Get comprehensive analysis of your region's industry mix, including the businesses that make up industries with high shares of employment or GRP. Use these insights to identify opportunities for economic diversification around anchor institutions and reduce vulnerability to disruptions like the coming enrollment cliff.



Questions?

Access the Report:

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