
RURAL'S RISE

Shifting Trends in
Rural and Urban
Job Postings



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AUTHORS

Julia Nitschke • Layla O’Kane
Drew Repp • Bledi Taska

DESIGN

Hannah Grieser

RURAL’S RISE:
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For questions or comments: media@emsibg.com

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Shifting Trends in Rural & Urban Job Postings

IN RECENT DECADES “Superstar Cities”—those metros with large shares of corporate headquarters, tech startups, innovation clusters, and talent—emerged and separated themselves economically from the rest of the country. While this isn’t a new phenomenon—it’s been occurring since our economy moved from agrarian to industrial—the digital economy hastened the pace. And then following the Great Recession, people flowed outward to coastal meccas and other large metros. After employment growth reached its nadir in 2019, metros saw a quick and steady climb, while nonmetros fell further behind.

KEY FINDINGS

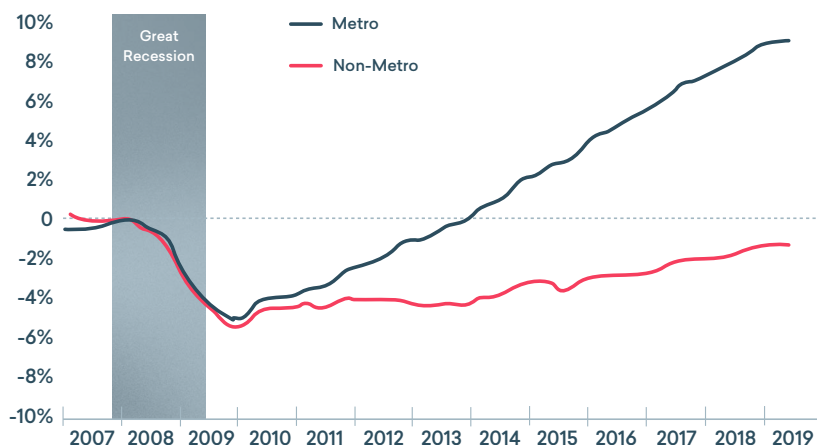
- ▶ Of the top 10 counties with the highest growth in posting share from 2019 to 2021, **nine of them are rural**.
- ▶ Rural job growth isn’t limited to specific sectors. Job postings for a **wide range of occupations** have grown more in rural areas than urban, including fields such as healthcare, technology, storage and transportation, and science.
- ▶ Rural areas have seen growth in **high-tech skills**, including mobile development, cloud computing, brand management, online marketing, and web analytics.
- ▶ Job postings from urban employers are more likely to allow for **remote work**. Since 2019 remote job postings in urban areas have grown 102% compared to only 14% in rural communities. This suggests that the jobs most likely to go remote are in urban areas—meaning “work anywhere” is opening the door to additional opportunities for those outside urban markets.
- ▶ The job growth in rural areas presents opportunities for **wage growth**. Salaries of jobs growing in rural areas are on average 20% higher than all jobs in those areas.

Now there are signs that the opposite may be happening: that the shifting nature of work is allowing jobs to flow out of urban areas to more rural ones. Some of the evidence is [anecdotal](#), some is more [empirical](#). But it seems clear that the COVID-19 pandemic has caused a re-evaluation of both how Americans work and [where they want to work](#).

To examine these trends from a different perspective, this report leverages our database of more than 1 billion current and historical job postings to see what work is being done where. From 2017 to 2019 there was higher growth in the share of job postings in relatively urban areas compared to rural areas. But that trend flipped from 2019 to 2021, with higher growth in the share of job postings being in relatively rural areas.

EMPLOYMENT GROWTH IN NON-METRO AND METRO US COUNTIES, 2007–19

% change since 2007 Q4



Seasonally adjusted. Non-metro status determined by the 2013 metropolitan area designations from the Office of Management and Budget.

Source: USDA, Economic Research Service using data from the BLS, Local Area Unemployment Statistics

What we mean by URBAN and RURAL

A county's urban-ness is determined by the percentage of the county population that lives within **urbanized** (50,000 or more people) or **urban cluster** (at least 2,500 people and less than 50,000) areas. We define **rural** counties as those with less than 40% of their population in such areas.

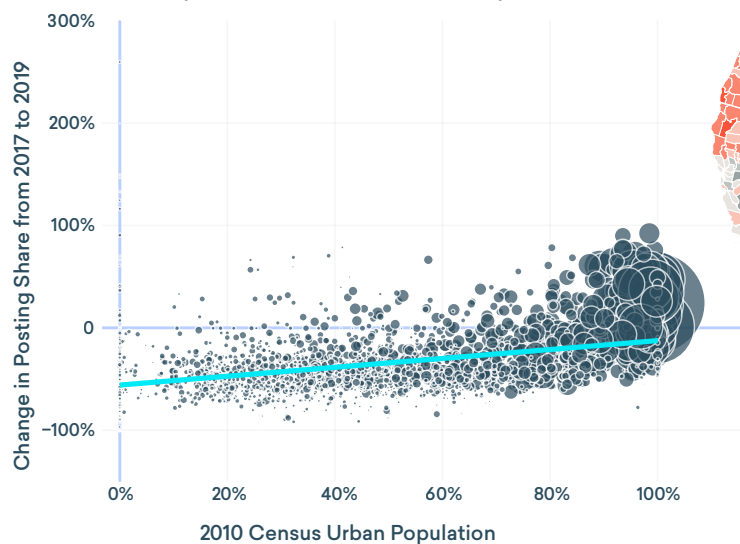


In the scatter plots below, the y-axis is the percentage change in job postings while the further out on the x-axis we move the more urban the counties are (the size of the bubble represent total population). From 2017 to 2019 more urban areas saw an upswing in percentage change in job postings—like a reverse Nike swoosh. But in the following three years that trend turns downward and rural areas, further back on the y-axis, saw the job posting growth.

Job postings shed a unique light on migration trends and complement both the anecdotal and empirical findings of flow to rural areas. The rise in [job postings allowing remote work](#) tell us that more people have the freedom to move, supporting rural population growth. At the same time, not everyone can

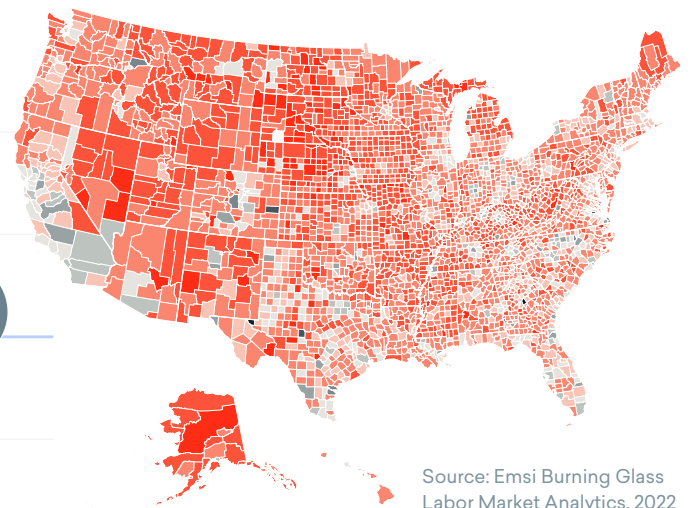
CHANGE IN JOB POSTINGS FROM 2017 TO 2019 vs URBAN POPULATION SHARE

Size of bubble represents 2010 Census Total Population



% CHANGE IN JOB POSTINGS SHARE, 2017–2019

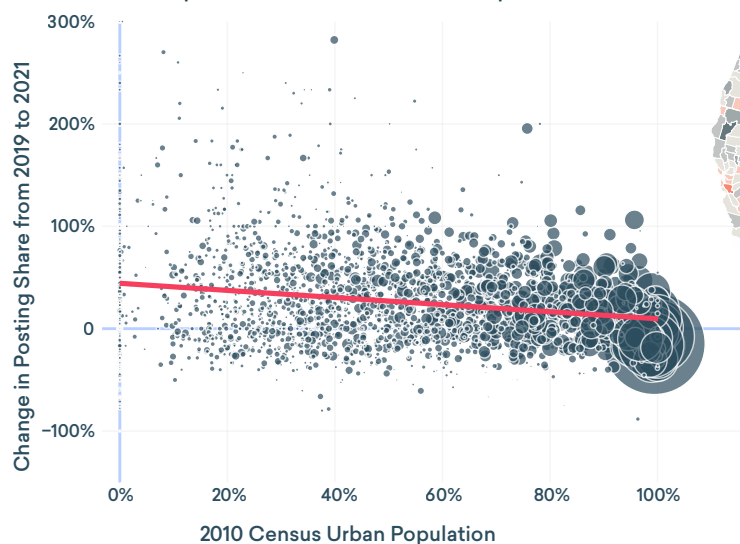
-100% -25% 50% 125% 200% 900%



Source: Emsi Burning Glass Labor Market Analytics, 2022

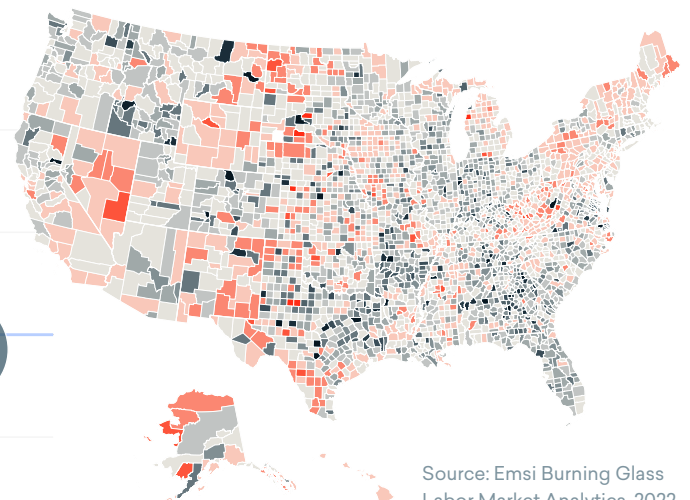
CHANGE IN JOB POSTINGS FROM 2019 TO 2021 vs URBAN POPULATION SHARE

Size of bubble represents 2010 Census Total Population



% CHANGE IN JOB POSTINGS SHARE, 2019–2021

-100% -25% 50% 125% 200% 900%

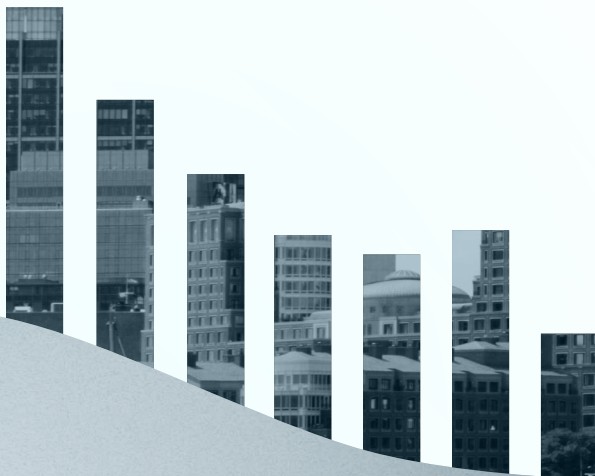


Source: Emsi Burning Glass Labor Market Analytics, 2022

work remotely, nor can all jobs be performed remotely. Thus, what jobs are available and where tells us a great deal—where opportunities are emerging, salary amounts generating local tax revenue, and the education and skill developments in a region.

For those in economic and workforce development, the question is how to capitalize on these trends. In rural, exurban, and suburban communities, these shifts could be an opportunity to build local prosperity—but to do this, stakeholders need a more precise sense of which jobs and skills are portable and which aren't. For leaders in urban communities, the challenge is how to retain talent, grow economies, and employ workers when some of their historic advantages may be fading.

One of the silver linings of the pandemic has been the possibility that it will diffuse the agglomeration of talent and innovation that has [concentrated opportunity in urban metros](#). That as people go in search of more affordable homes, easier commutes, and a [quieter lifestyle](#), rural areas have the chance to regain the most important part of any economy: people. Since people follow opportunity, these job posting trends tell us there may be hope that the [divide between rural and urban America](#) could close.



An Urban Slide

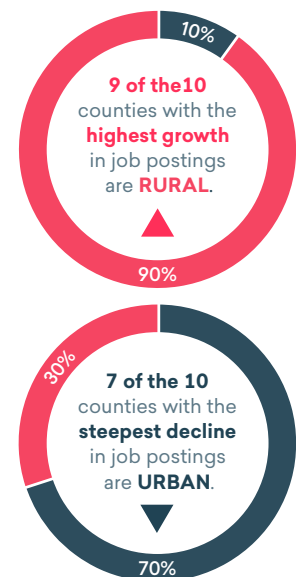
FROM 2017 TO 2019 there was higher growth in the share of job postings in relatively urban areas compared to rural areas. But that trend flipped from 2019 to 2021, with higher growth in the share of job postings being in relatively rural areas.

Of the top 10 counties with the highest growth in posting share from 2019 to 2021 (with >1000 postings in 2021), nine of them are rural. And pushing out to the top 50 counties, 90% (45) of them were rural counties.

Meanwhile, seven of the 10 counties with the largest decline in postings were urban. Less populated rural areas will have some advantages in making their way to the top of these rankings, as the absolute change in their postings has a greater impact on percentage change than in urban areas with more employers and jobs. But the same holds true for decreases. A decline in absolute postings in rural counties will drive a larger percentage drop in job posting share. Thought of another way, a new business hiring 100 employees has a larger impact on a rural community than a large metro. But that same business leaving or closing also has a larger impact in the rural community.

Unlike actual hires and employment data, job postings tell us not what employers have done, but what they intend to do or would like to do. They are thus more forward-looking than backward-looking. And it appears that employers are signaling a belief that some major metros no longer hold all the talent they need or that that talent can at least be found elsewhere as well.

COUNTIES WITH THE MOST GROWTH AND DECLINE IN JOB POSTINGS, 2019–2021



Source: Emsi Burning Glass data, 2022

Some notable major metros saw job posting share fall substantially.

From 2019 to 2021, San Francisco, New York, Santa Clara, and Baltimore counties saw their postings share drop by at least 30%.



SAN FRANCISCO COUNTY
(San Francisco)

-38%



NEW YORK COUNTY
(Manhattan)

-32%



SANTA CLARA COUNTY
(San Jose)

-31%

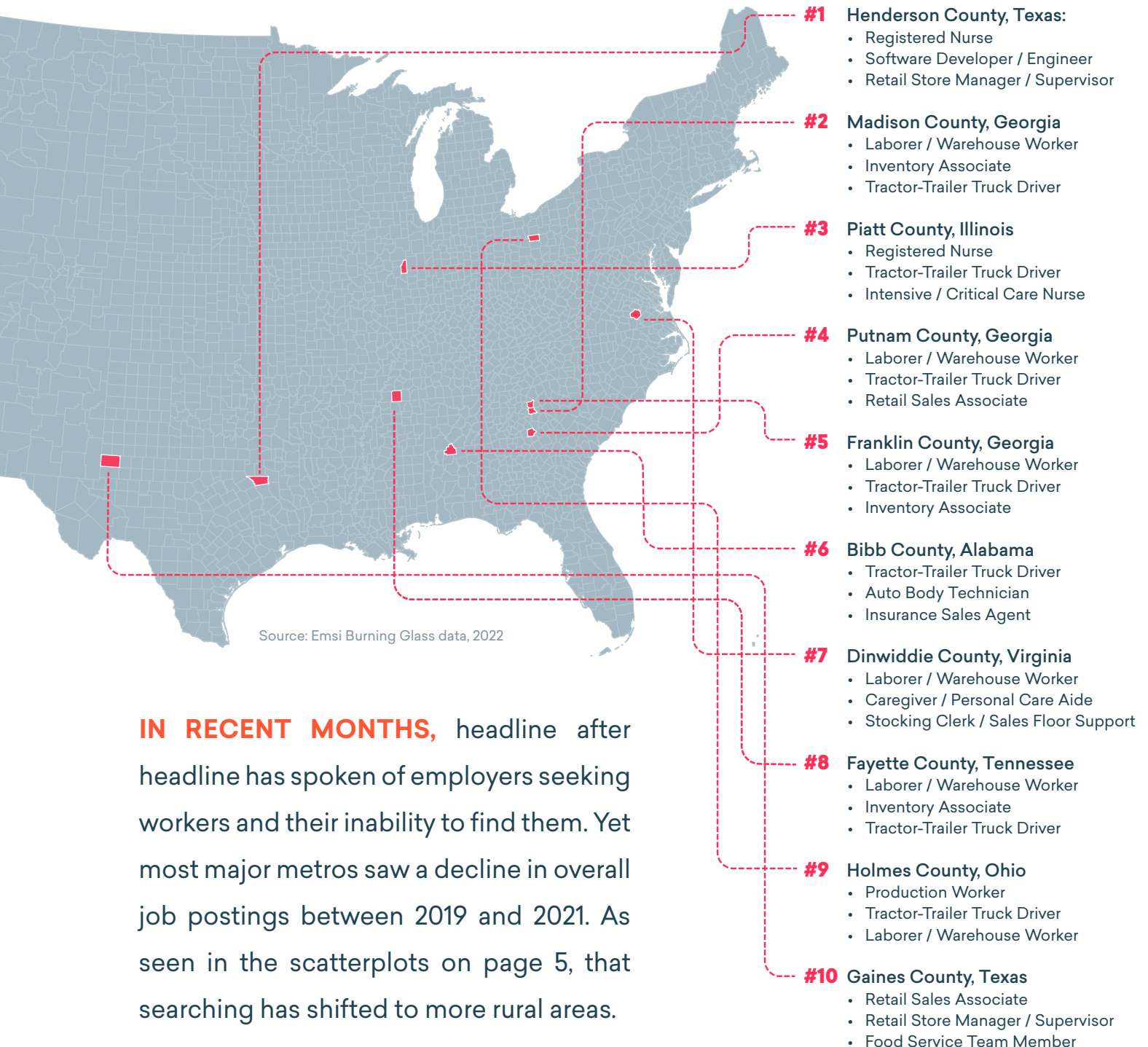


BALTIMORE COUNTY
(Baltimore)

-31%

Where in the Rural

RURAL COUNTIES WITH THE MOST POSTING GROWTH, 2019–2021,
AND TOP 3 MOST DEMANDED OCCUPATIONS IN 2021



Who Are Employers Looking for in Rural Areas?

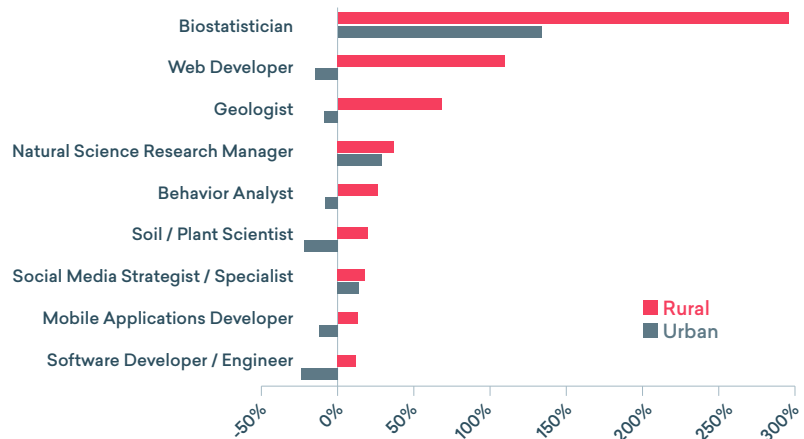
A WIDE RANGE OF OCCUPATIONS, cutting across healthcare, tech, warehouse and transportation, and science sectors, have expanded in popularity in rural areas compared to urban.

The greatest jump in rural demand was for biostatisticians, likely as part of the response to COVID-19 and continued public health work. While the raw number of biostatistician jobs is small, it can serve as a bellwether for other life sciences roles. Perhaps driven by the need for a stronger web presence during the pandemic, web developers grew more than 100% in rural areas even as the role declined in urban counties. Roles meeting the delivery demand of e-commerce growth in rural areas—inventory associates and postal service workers¹—also outpaced urban growth.

Evidence of some tech dispersion is seen in posting activity for roles requiring a BA or higher. In addition to the web developer role, mobile app developer and software developer postings have fallen in metros while increasing in rural counties.

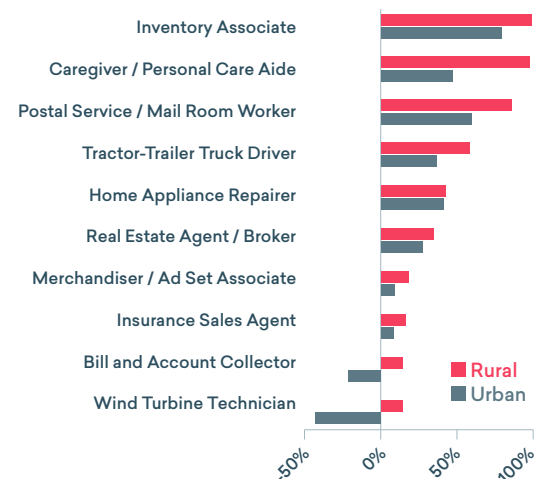
Both the nationally hot housing market and the influx of people to less dense areas appears to be pushing demand for real estate agents in rural counties. With the green economy driving ahead, wind turbine technicians in rural counties saw a near 20% growth in posting share despite a more than 20% fall in urban. As the U.S. Energy Information Administration notes, favorable sites for wind farms include “the tops of smooth, rounded hills; open plains and water; and mountain gaps.” It makes sense that the installers, maintainers, and repairers of wind turbines are most often going to be needed in more rural areas.

TOP RURAL BA+ OCCUPATIONS VS. URBAN GROWTH
% change in postings share, 2019–21



Source: Emsi Burning Glass data, 2022

TOP RURAL SUB-BA OCCUPATIONS VS. URBAN GROWTH
% change in postings share, 2019–21



Source: Emsi Burning Glass data, 2022

¹ This job category includes private delivery service workers as well as the U.S. Postal Service.

AVERAGE SALARIES

\$63,725

20 fastest
growing rural
occupations

\$52,950

All rural
occupations

Source: Emsi Burning Glass
data, 2022

The advertised salaries of these occupations are on average 20% higher than all jobs in rural areas. Among all occupations, the average salary clocks in at \$52,950, but for the 20 occupations that have seen the greatest posting growth in these areas, it's \$63,725. This suggests that this shift is allowing for a salary bump and a potential career step for local workers. It may also signal that employers don't feel they can cut wages for the same job in a lower cost of living market.

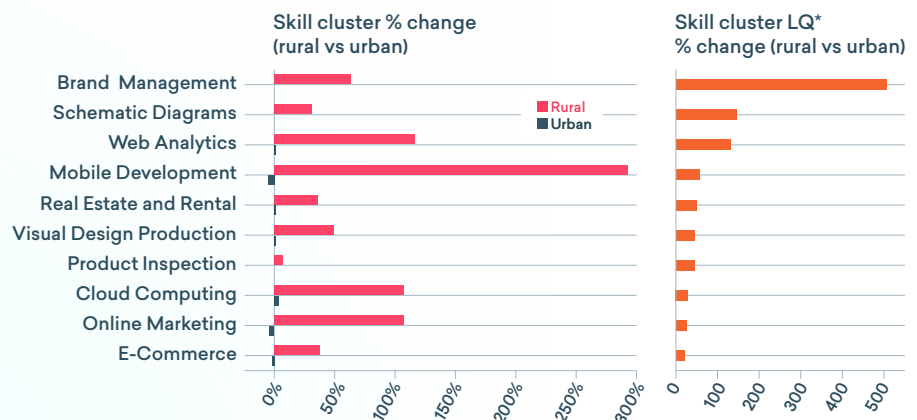


What Skills Are Growing in Demand in Rural Areas?

SKILLS EXTRACTED from job postings both reinforce that occupations in tech and healthcare are seeing rural demand growth, but also reveal that marketing roles are expanding.

Skills clusters in brand management and online marketing point to a growing demand for sales and marketing professionals. Clusters such as mobile development and cloud computing point to various software, app, and web developer and engineer roles.

TOP IN-DEMAND SKILLS IN RURAL AREAS



Source: Emsi Burning Glass data, 2022

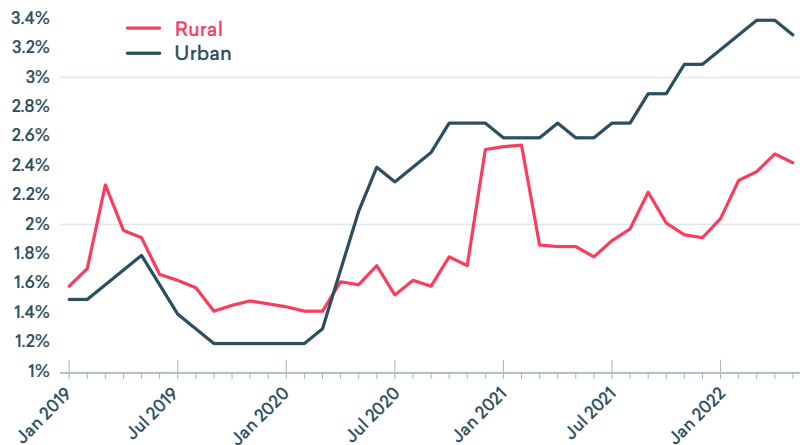
***Location quotient (LQ)** helps identify areas of aggregation by quantifying how concentrated a particular industry, cluster, occupation, demographic group, or other grouping is in one region compared to another. In this analysis, we're comparing rural to urban, where the LQ of the skill cluster is percent growth in rural areas over percent growth in urban areas. As an example, the brand management skill cluster growth was 500 times higher in rural areas than in urban.

The Role of Remote Work

THE CREDIT GIVEN to remote work for a rural revival and renewed interest in suburbs and exurbs is likely well deserved. Since 2019, remote job postings by employers in urban areas have grown 102% compared to only 14% in rural communities.

SHARE OF WORK-FROM-HOME POSTINGS OVER TIME

3-month rolling average



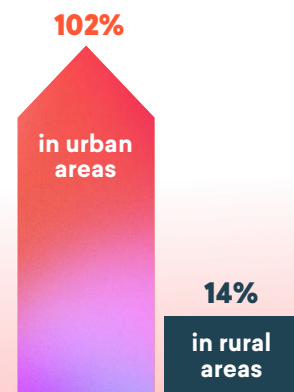
Source: Emsi Burning Glass data, 2022

This allows for people to take their job with them, but also opens the door to additional opportunities for those outside urban markets. But demand in rural areas is also being driven by a need for in-person workers such as inventory associates, personal care aides, and real estate agents.

The top occupations that allow remote work in both urban and rural areas are very similar and include insurance sales agent, customer service representative, sales representative, and software developer/engineer.

Perhaps most interesting is when the remote spike occurred for rural and urban counties. While urban communities saw a spike at the outset of the pandemic followed by a steady rise, rural communities saw a spike around the beginning of 2021, a steep fall, and modest growth since.

GROWTH IN REMOTE JOB POSTINGS, 2019–2021



How to Respond to a New Geography of Jobs

BOTH RURAL AND URBAN leaders have their work cut out for them. Rural communities must recognize that this is not a wholesale migration out of cities. Specific occupations and skills are more portable than others. Urban communities have to come to grips with the fact that urbanization has lost some of its shine and that the 2010s may not have fulfilled expectations as the “decade of the city.”

Know your region's (data) story

Strategies developed on anecdotes alone or based on broad, national trends likely won't bear much fruit. Knowing the age demographics of your region will inform whether caregiver and personal care aides will be rising in demand in the coming years. If there is a clinical trial company or land grant research university within a reasonable commute, biostatisticians may be on the move to your community. But if such employers aren't in your backyard, the likelihood of attracting that talent may be less.

Similarly, the degree to which central business districts return to their pre-pandemic levels will need to be closely monitored. If many of the service industry employers and jobs don't fully return, the need for identifying skill adjacent pathways will only grow. Economic and workforce leaders will need to continue innovative approaches to using data. A great example of this is the Manhattan Chamber of Commerce's use of foot traffic and OpenTable data to keep a real-time pulse on business health.

Chamber RVA, which covers Richmond, Virginia (Henrico, County) and six surrounding counties, took a data-driven approach to understand their region's migration and developing their talent retention and attraction efforts. Profiles of Richmond region post-secondary alumni that graduated between 2015 and 2020 were analyzed by graduating institution, degree level, graduation year, program of study, and current MSA region to enable exploration of talent retention and migration trends. The result is the chamber is moving beyond quality of life slogans and honing in on university alumni most likely to stay or return to the area.



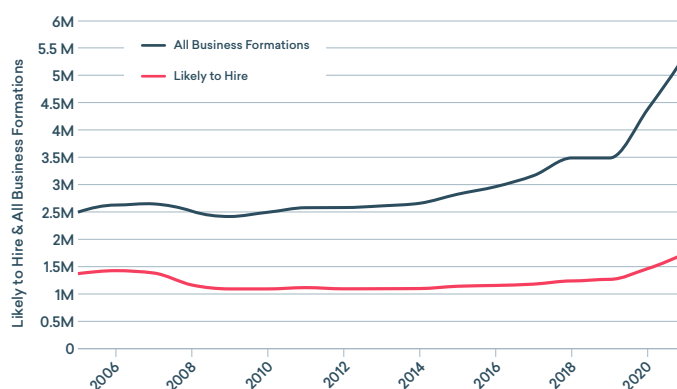
Don't forget about your backyard

Certain jobs and skills are growing in prevalence in rural counties, outpacing growth in urban areas. And indeed, major metros saw a [spike in outmigration](#) during the pandemic. But a wholesale “urban exodus” hasn’t occurred and as urban studies theorist Richard Florida [has noted](#), while the largest metros like Los Angeles and New York are seeing population drops, the next tier of still-large metros (such as Phoenix and Atlanta) are seeing big gains.

All this to say, growth in any one particular mid-sized or small community due to remote work or desires for less density will still be modest. Consequently, the primary job growth a community will experience will still come from within—local employers making local hires. Trying to attract talent and chip away at tech hubs is mostly going to be a frustrating endeavor, while building talent locally is more likely to pay off. Brookings highlights that research “...underscores that disruptive technologies tend not only to emerge in just a few urban areas...but also to be commercialized there.” Hence, for communities to see the kind of prosperity they desire from technology-led innovation, an entrepreneurship focus is likely a better bet.

Individuals are already doing this, communities simply need to double down. New business starts [surged during the pandemic](#), and it’s not just sole proprietorships. New business applications from firms likely to hire employees surged as well, from 1.3 million in 2019 to 1.8 million in 2021. Put another way, perhaps the best thing a community can do is work to fold those newly arrived web developers and data analysts, with their specialized and technical skills such as ElasticSearch and PostgreSQL, into their entrepreneurial ecosystem.

US BUSINESS FORMATIONS, 2005–2021



Source: U.S. Census Bureau



Maintain perspective

You can't build homes or grow apples online. [Not all jobs can be done remotely](#), and even if a job can, not all employers will want it to. And as this report highlights, many of the jobs emerging in rural areas are in-person: postal workers, personal care aides, and real estate agents. Thus, the opportunity is still finite and should be kept in perspective.

Just as large recruitment projects have likely pulled an unwarranted amount of a community's attention, regions will have to be careful not to put all their eggs in the remote basket.

If you are going to invest in tech and remote capable opportunities, take the time to be thoughtful. The Center of Rural Innovation has [examined](#) specifically how tech work is viewed in rural communities and what's needed to help communities attract and retain tech talent. There's no reason to rush it. If indeed people have become more mobile, they will still be mobile a few years from now.

Conclusion: The Rural Decade?

RURAL'S GROWTH IN JOB POSTINGS SHARE raises one of the most common questions of trends coming out of the pandemic: is the change permanent? Or over time will a return to pre-pandemic levels occur?

At least over the last three years, jobs have shifted out of urban areas to more rural areas. If the trend continues or picks up, we may be witnessing the beginning of the “decade of rural.” Or urbanization may continue to occur, just in different cities than recent decades.

Job postings tell us the roles and skills that are becoming more prevalent in rural areas. One thing that is for sure then, is that communities can plan and strategize how to attract and accommodate based on who is likely to show up. Cities can also see who is being drawn out and prepare properly to keep them. Because job postings signal employers' intent, they are a leading indicator of which way the trend is currently going.



Methodology

THIS ANALYSIS was conducted at the county level. Data from the 2010 US Census was used to determine whether a county was urban or rural. Urban was defined as counties with greater than or equal to 60% of the population being in urban areas. Rural was defined as counties with greater than or equal to 60% of the population being in rural areas.

To understand shifts in trends in rural and urban jobs we looked at job postings across various years, focusing primarily on 2019 vs. 2021 for most of the analysis. We compared the county's share of job postings in 2019 to the county's share of job postings in 2021 to determine how the county changed in terms of posting demand.

To create a list of top occupations that grew in rural areas, we first defined the universe of rural areas seeing growth in job posting share, then:

- ▶ Found the total number of job postings in each county for both 2019 and 2021 as well as the county's total share of national postings in each year.
- ▶ Calculated the growth rates based on the total county share in each year from 2019 to 2021.
- ▶ Limited to counties that are rural as defined above and also experienced growth in posting share from 2019 to 2021.

To calculate the top occupations in those areas, we then:

- ▶ Counted the number of job postings by occupation across all rural, growing counties for 2019 and 2021.
- ▶ Limited to occupations with greater than 200 rural postings in 2021 for sample size constraints.
- ▶ Calculated occupation shares for 2019 and 2021, then calculated percent change between 2019 and 2021.
- ▶ Sorted by the percent change to generate a list of occupations growing the most in rural areas.



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