

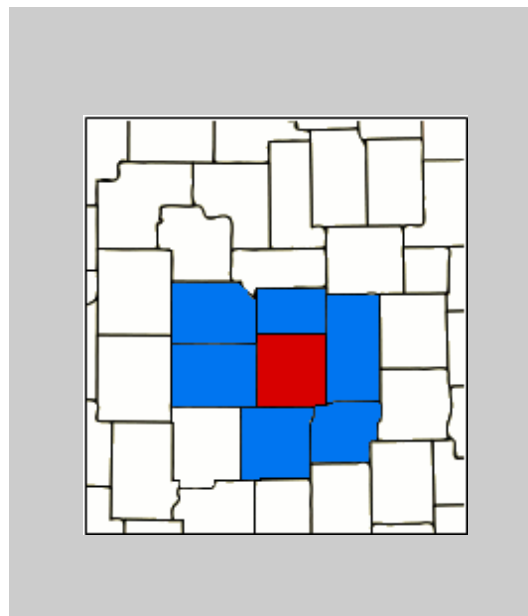
WORKFORCE AVAILABILITY



Sample Report

PROGRESS ECONOMIC DEVELOPMENT CORPORATION

PROGRESS EDC AREA LABOR MARKET/LABOR SHED



Prepared for
Progress Economic Development Corporation
Progress, Somewhere



Research Conducted by:

THE GROWTH SERVICES GROUP

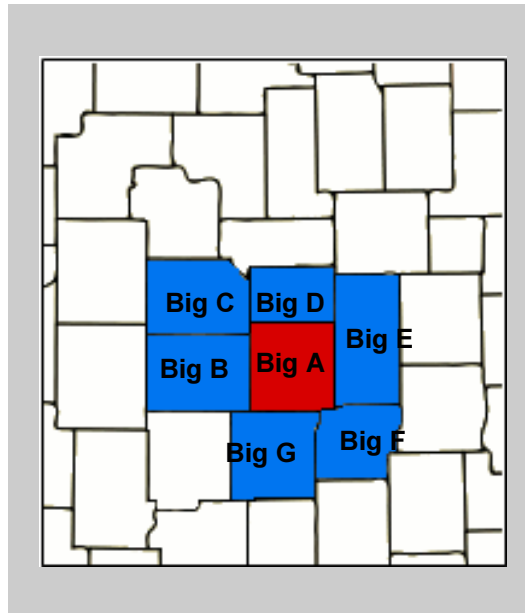
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UNDEREMPLOYMENT • AVAILABLE SKILLS • DESIRED WAGES

PROGRESS ECONOMIC DEVELOPMENT CORPORATION

WORKFORCE AVAILABILITY

Progress EDC Area Labor Market/Labor Shed



Funded By:

Progress Economic Development Corporation

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I. EXECUTIVE SUMMARY

INTRODUCTION

The Progress Economic Development Corporation (EDC) commissioned a Workforce Availability Study to measure the amount and quality of potential employees in a seven-county *labor shed* or *area labor market* (ALM). The EDC Area Labor Market consists of the core county of Big A, henceforth known as the **Core ALM**. The other six counties of Big B, Big C, Big D, Big E, Big F, Big G, will henceforth be known as the **Non-core ALM**. The **Overall EDC ALM** consists of the combined **Core ALM** and the **Non-core ALM**. The purpose of this report is to assess the **available workforce** for this region which means all seven counties need to be considered as the Area Labor Market. The **available workforce** represents those who indicate that they are looking for employment or would consider changing their employment for the right job opportunity. However, on occasions it is advantageous to compare the **available workforce** with data from all respondents. At that time the terminology used will be *population*, *working population*, or *non-working population*.

GENERAL FINDINGS, OPPORTUNITIES, AND CHALLENGES

The Workforce Availability Study shows that Progress EDC provides a stable and productive workforce. The availability, education, and skills add value and competitiveness to the area labor market. The components of this study quantify the strengths and challenges of this workforce. The methodology of the research process is presented in Appendix B.

A subset of the **available workforce** of interest to many employers in a large scale hiring mode are those who are identified as **underemployed**. These individuals are currently **working** and would take a better job if offered. They do possess the skills, education, and experience to qualify them to do so. Of the 211,104 persons in the **available workforce**, 38,080 are considered **underemployed** (see more on pages 11-13).

With the right employment opportunities, the EDC ALM appears positioned to retain and attract the talent necessary for growth of new and existing businesses representing regional, national, and international markets. The EDC has several advantages. The location provides advantages with both urban and rural amenities. It has a diverse workforce talent pool within easy commute and the cost advantages in some cases inherent of a more rural setting. Additionally, from 2000 to 2009, the population of the seven-county EDC Area Labor Market grew 3.3%.

WORKFORCE AVAILABILITY FINDINGS

The workforce availability findings reflect the views and perspectives of people between the ages of 18 and 64 who would consider seeking or changing employment. This group represents the supply side of the workforce market. This summary is directed at the **Overall EDC ALM** while the full report distinguishes the differences between the Big A county **Core ALM** and the six-county **Non-core ALM**. The overall findings are as follows:

- About 28 percent (211,104 persons) of the total population in the **Overall EDC ALM** is considered to be the **available workforce**.

- It is estimated 70,818 **non-working** and 140,286 persons in the **working** segments of the **available workforce** are seeking employment or are **willing to change** jobs if the right opportunity arises.
- The **non-working** segment of the **available workforce** is composed of 13,782 **homemakers**, 17,003 **retirees**, and 40,033 unemployed.
- The primary occupational clusters of the **available workforce** of the Progress EDC ALM include 3.1 percent in management, 8.8 percent in production/repair/installation, 17.9 percent in professional/technical, and 36.7 percent in service occupations.
- Approximately 18.0 percent of the **available workforce** (38,080 individuals) is **underemployed**.
- Thirty-two percent (32%) of the **available workforce** would be interested in employment with a wage up to \$12.99 per hour. The average desired wage rate for the occupational clusters shows that the professional/technical group is seeking \$22.71; production/repair/installation, \$20.22; service sector, \$19.18; and the **non-working** group, \$13.81.
- The education level of the **available workforce** includes 74.5 percent with at least some college education and 95.7 percent with at least a high school diploma.
- The **available workforce** is willing to commute an average of 30 minutes/miles. Currently, the **working** population commutes an average of about 26 minutes/miles. Of the **available workforce**, 79.4 percent (167,719 people) would travel more than 15 minutes/miles one way for work while 36 percent (75,659) would commute more than 30 minutes/miles and 3.0 percent (6,349) would travel more than 60 minutes/miles.
- The overall average age of the **available workforce** is 42.4. The **available workforce** includes 44.2 percent (93,353) under the age of 40. The average age of the **available workforce** by occupational cluster is 42.8 for management, 42.1 for production/repair/installation, 39.7 for professional/technical, and 41.5 for service sector.
- The top motivators for changing jobs among those open for the right opportunities are 87.6 percent salary, 72.0 percent retirement considerations, and 71.0 percent flexible hours.
- A majority, 70 percent (97,815 individuals), of the **available workforce** stated they are willing to work outside of their primary field of employment (i.e., those in manufacturing would be willing to work in the service sector, etc.).
- The average years on the job for the Progress *Overall ALM* is 14.3 years which reflects both a stable and mature workforce.
- Approximately 8 percent (8,239 people) of the **working available workforce** live inside the **Core** but work outside in the **Non-core ALM**. Another 2 percent (2,060 people) of those living in the **EDC Core** work outside the **Overall ALM**.
- Approximately 14 percent (15,450) of the employed workforce lives in the **Non-core ALM** but work in the **Core ALM**. Another 3 percent (3,604) of the **Non-core** workers work outside the **Overall ALM**.
- The **underemployed** provide the best opportunity for potential applicants. They represent a subset of the **available workforce** that is better educated and more motivated than the **available workforce** in general.

II. OVERVIEW

INTRODUCTION

The primary purpose of the Progress Economic Development Corporation (EDC) Area Labor Market (ALM) Workforce Availability Study is to determine the total number of workers available for employers considering expansions and major investments. The **available workforce** represents respondents who indicate they are either looking for employment or would consider changing jobs for the right employment opportunities. The key advantage of an Area Labor Market (ALM) analysis is that it expands the pool of potential workers by including workers excluded from the civilian labor force (CLF). It also allows researchers to examine those members of the ALM pool who have a propensity to consider a job opportunity given their employment expectations.

The focus of this study is the Progress EDC ALM. The ALM, which is also known as a *labor shed*, for the purpose of this study is defined as the area or region from which the employment center draws its commuting workers. Therefore, the Progress EDC ALM will consist of seven counties which will be divided into the *Core* and the *Non-core* counties. One county, Big A, forms the **Core ALM** because this county comprises the Progress EDC. Since not all workers live and/or work within those counties, a broader region needs to be considered. As a result, another six counties, Big B, Big C, Big D, Big E, Big F, and Big G, are added and comprise the **Non-core ALM**. The **Overall EDC ALM** consists of the combined **Core ALM** and the **Non-core ALM**. This report also includes workers who are commuting out of the designated seven-county ALM to work but would be willing to work closer to home with the right employment opportunities. However, on occasion it is advantageous to compare the **available workforce** with data from all respondents. At that time the terminology used will be *population*, *working population*, or *non-working population*. The following table provides an overview of the total **available workforce** including the subset groups from the **working** and the **non-working** population and whether located in the **Core EDC ALM** or the **Non-core EDC ALM**.

The findings from this survey are based on a type of stratified random telephone sample of 705 adults living in

T0: Total Available Workforce (Overview)			
Characteristics	Overall ALM	Core EDC ALM	Non-core ALM
Total Available	211,104	105,074	106,030
<i>Working Available (Willing To Change)</i>	<i>140,286</i>	<i>65,041</i>	<i>75,245</i>
Willing To Change Only*	56,272	19,824	36,448
Seeking Different Employment	45,934	27,563	18,371
Underemployed	38,080	17,654	20,426
<i>Non-working Available (Willing To Work)</i>	<i>70,818</i>	<i>40,033</i>	<i>30,785</i>
Unemployed	40,033	21,001	19,032
Homemaker	13,782	8,532	5,250
Retired	17,003	10,500	6,503

*While all those in the working available workforce are willing to change with the right opportunity, only 45,934 are seeking different employment and 38,080 are identified as underemployed and willing to change. In the non-working, all are willing to work with the right opportunity.

the 13 counties of the Progress EDC Area Labor Market. The Progress EDC contracted with Growth Services to design and administer the workforce study. Answernet, Columbus, OH, conducted the survey interviews in November 2010 using a Computer Assisted Telephone Interviewing (CATI) System. In 705 of these households an adult who is **working** or **non-working** between the ages of 18 and 64 agreed to participate in the interview. When all 705 respondents are included in the analysis, the survey aggregate results have a margin of error of $\pm 5\%$. Subsets of the study group will have a higher error rate. A more detailed description of the survey process and methodology is presented in Appendix B.

III. AVAILABLE WORKFORCE

The following table, T1, describes the **available workforce** in the Progress EDC seven-county ALM or labor shed. The **available workforce** for this region consists of 211,104 people which demonstrates the region is more than sufficient in scope and diversity to support any size employer considering expansion or location in the Big A county *EDC Core* of Mason, Progress, Big F, and Woodford counties.

T1: Summary Workforce Results			
Characteristics	Overall EDC ALM	Core EDC ALM	Non-Core ALM
BLS ALM Population Estimates	748,400	372,000	376,400
BLS ALM Civilian Labor Force Estimates	391,800	199,900	191,900
<i>Available Workforce</i>	211,104	105,074	106,030
Underemployment*	38,080	17,654	20,426
<i>Available Workforce—Average Age (18-64)</i>	42.4	42.2	42.5
Underemployed—Average Age (18-64)	44.4	44.2	44.5
Average Actual Wage (only working)	\$20.63	\$18.97	\$22.16
Average Desired Wage (both working and non-working)	\$19.11	\$17.91	\$20.25
Average Desired Wage (underemployed)	\$18.83	\$18.55	\$19.08
Household Income (only working)	\$73,940.91	\$64,202.41	\$80,969.57
<i>Available Workforce—Household Income</i>	\$68,882.05	\$59,777.95	\$76,801.36
<i>Available Workforce—% Females</i>	47.3%	49.8%	45.0%
Underemployed—% Females	49.7%	50.4%	48.9%
<i>Available Workforce—Education (at least some college)</i>	76.1%	75.1%	77.0%
Underemployed—Education (at least some college)	82.9%	84.2%	81.8%

Sources: seven-county Workforce Survey (November 2010); Bureau of Labor Statistics (BLS) Population and Labor Force Estimates

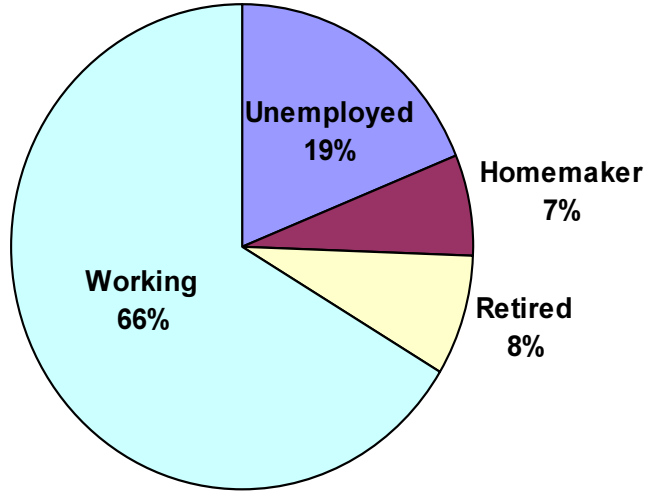
The **available workforce** will be divided into two segments: **working** and **non-working**. The **working** segment includes those who are **willing to change for the right opportunity** which includes those actively seeking a job change and those who declare themselves **underemployed**. The **non-working** segment includes those **seeking or willing to work** jobs and is divided into three subsets which include the unemployed, **homemakers**, and **retirees**.

OVERALL AVAILABLE WORKFORCE

The total **available workforce** for the Progress seven-county EDC Area Labor Market is 211,104 or 28.2 percent of the estimated 748,400 total population. The following chart, C1, presents the subsets of the **available workforce** in the population between the ages of 18 and 64.

Of the 211,104 members of the **available workforce** in the ALM, those **seeking and willing to change jobs with the right opportunity** can be divided into two segments. The first, the **working** segment, consists of 140,286 people and the second, the **non-working** segment, consists of 70,818 people. The greater portion of the **employed labor force**, or approximately 60.0 percent, would not consider changing

C1: Seeking and Willing to Change with Right Opportunity

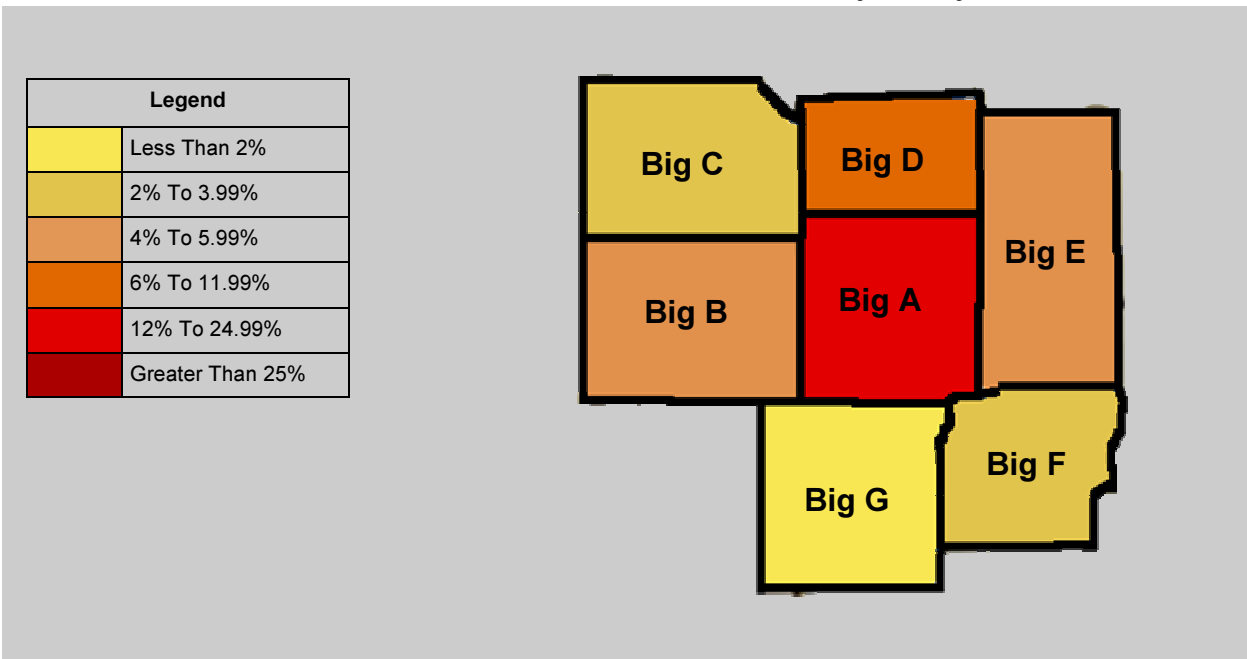


employment. They are satisfied with their place of work, job security, benefits, and age/nearness to retirement and do not want to change employment.

The map, M1, shows how each county in the ALM compares to the other counties in terms of percent of the **available workforce** for jobs in the Progress EDC ALM. Each county is grouped into one of six categories specified in the legend. The counties containing the most available workers are: ???

The map, M1, shows how each county in the ALM compares to all the other counties in terms of percent of the total **available workers** for jobs in the Progress seven-county EDC ALM. Each county is grouped into one of six categories specified in the legend. The counties containing the most available workers are: ???

M1: Sources of Available Workforce in ALM by County



Average Age and Years on the Job

The average age and years on the job (T2) for the various occupational clusters indicate a mature, experienced, and diverse **available workforce**. Consumer services including retail and hospitality along with computer technology, science, and engineering occupations appear to have younger workers while white collar, managerial, and office and clerical occupations have the older workers. Government office and clerical occupation workers have the most years on the job while the workers in the protective occupations have the least years on the job. Table T4 displays the distribution of ages for the **available workforce**.

T2: Available Workforce Average Age and Years on Job		
	Average Age	Years on Job
Administrative Support: Shipping/Receiving, Secretaries, Computer Operators, etc.	45.6	14.6
Business Office and Clerical Operations	47.5	12.6
Business Sales: Finance, Insurance, Real Estate, Wholesale, Industrial, etc.	40.0	11.9
Certified Professionals: Doctors, Lawyers, Engineers, Accountants, Professors, etc.	40.5	10.8
Consumer Services, Retail, Restaurant, Hotel, Food Services, etc.	37.9	9.6
Computer Technology, Science, Math, and Engineering	36.6	8.7
Delivery/Drivers/Couriers	51.0	15.3
Government Office and Clerical Operations	46.0	15.5
Health, Social, Community, Personal Care, and Recreation Services	41.9	10.0
Maintenance, Installations, and Repairs (Mechanic, Carpenter, Plumber, Electrician)	44.8	13.2
Managerial, Executive, Business Owners, Farmers, Supervisory	47.1	12.5
Other Blue Collar: Laborers, Farm Hand, Janitor, Warehouse Workers, etc.	36.7	12.0
Other White Collar Workers	50.3	13.8
Production: Factory Assembly, Fabrication, Construction, and Mining	39.0	13.5
Protective: Police/Fire/Military/Regulators/Investigators and Postal	43.0	8.0
Teachers, Instructors, Trainers, Writers, Researchers, etc.	40.7	14.3
Non-Working Available Workforce	44.7	0.0

T3: Average Age by Occupational Clusters	
	Average Age
Management	42.8
Production/Repair/Installation	42.1
Professional/Technical	39.7
Services	41.5
Non-Working	44.0

T4: Age Ranges for Available Workforce		
	Percent	Projected Population
18-29	24.1%	50,920
30-39	20.1%	42,433
40-49	22.6%	47,737
50-59	20.1%	42,433
60-64	13.1%	27,581

Current and Previous/Other Work Experience

The following table, T5, shows the current work experience and/or the previous fulltime or part-time work experience of those **working** and **non-working** respondents. The table provides a perspective on the types of workers available for employment in the EDC ALM. The first column in the table shows the number of current workers employed in the various occupational clusters.

Respondents are indicating a high level of employment availability from the service sector in areas of health, social, and community care and in the retail, hospitality, and food service occupations. However, the survey shows a workforce with skills, education, and experience available across the entire occupational classifications if the right employment opportunities are present.

T5: Available Workforce Current and Previous Work Experience			
	Current Occupation	Previous Occupation	Second/Other Occupation
Administrative Support: Shipping/Receiving, Secretaries, Computer Operators, etc.	6,708	1,015	515
Business Office and Clerical Operations	8,238	1,545	515
Business Sales: Finance, Insurance, Real Estate, Wholesale, Industrial, etc.	9,383	1,430	0
Certified Professionals: Doctors, Lawyers, Engineers, Accountants, Professors, etc.	6,204	450	515
Computer Technology, Science, Math, and Engineering	7,738	520	0
Consumer Services, Retail, Restaurant, Hotel, Food Services, etc.	18,625	5,574	4,119
Delivery/Drivers/Couriers	1,545	515	515
Government Office and Clerical Operations	6,694	0	1,030
Health, Social, Community, Personal Care, and Recreation Services	20,652	4,515	5,149
Maintenance, Installations, and Repairs (Mechanic, Carpenter, Plumber, Electrician)	9,183	1,115	515
Managerial, Executive, Business Owners, Farmers, Supervisory	6,454	220	1,030
Other Blue Collar: Laborers, Farm Hand, Janitor, Warehouse Workers, etc.	10,813	1,030	3,089
Other White Collar Workers	4,119	515	1,030
Production: Factory Assembly, Fabrication, Construction, and Mining	9,513	2,330	515
Protective: Police/Fire/Military/Regulators/Investigators and Postal	1,030	0	1,030
Teachers, Instructors, Trainers, Writers, Researchers, etc.	13,387	1,030	2,060
Non-Working Available Workforce	70,818	0	0

WORKING AVAILABLE WORKFORCE

The willingness of the currently employed to change employment with the right opportunity is a key indicator in profiling the characteristics of the **available workforce** in the Area Labor Market. The employed individuals who are willing or likely to change jobs with an existing or a different employer represent the primary pool of **available workforce**. The results of this workforce survey show that 70.8 percent of the respondents identified themselves as **working** at the time they were contacted with the other 29.2 percent as **non-working**.

It is important to analyze each segment of respondents to identify and respect the differences and contributions to the ALM. Many factors must be considered when evaluating these workers, such as education, unused skills, wages and benefits desired, past experience, and the distance individuals are willing to travel to work. Within the **working available workforce** are three subsets: those **willing to change**, those actively seeking to change jobs (**seeking and willing to change**), and those who classify themselves as **underemployed and willing to change**. Respondents of these three subsets are counted only once as part of those **willing to change with the right opportunity**. Those who identify themselves as **underemployed** are counted as **underemployed** only if they are also **willing to change** jobs given the right opportunity. There may be others in the population who meet the definition of **underemployment** but because of age, length of employment, benefits, or proximity to retirement may not want to change.

Willing to Change Jobs

The **available workforce** in the **Overall EDC ALM** who are currently employed is 140,286. In the **Core** Area Labor Market those **willing to change** number 65,041 and in the **Non-core ALM** those **willing to change** number 75,245. See Table T6 for more characteristics of this group.

T6: Willing to Change Working Workforce Characteristics			
Characteristics	Overall EDC ALM	Core EDC ALM	Non-Core ALM
<i>Willing to Change</i>	140,286	65,041	75,245
Years on Job	11.8	11.5	12
Willing to Commute One Way	31.9	31.5	32.3
Current Average Wage	\$20.63	\$18.97	\$22.16
Desired Average Wage	\$20.88	\$19.41	\$22.16
Household Income	\$73,440	\$64,207	\$80,227
Average Age	44.4	44.3	44.5
Male/Female Ratio	50/50	50/50	51/49
Working a Second or Part Time Job	14.3%	17.4%	11.5%
Only Job Part Time or Temporary	22.3%	25.5%	19.5%
Has No Employer-Provided Health Insurance	21.3%	23.2%	20.5%
Has No Health Insurance	21.4%	21.9%	20.9%
Has No Retirement Benefits	30.3%	30.4%	30.1%
<i>Willing to Change/Right Opportunity</i>	140,286	65,041	75,245

AGE AND GENDER

The mean or average age of this group is 44 years. The **willing to change** respondents are distributed among all age ranges: 18 to 24 (10.7%), 25 to 34 (25.0%), 35 to 44 (25.7%), 45 to 54 (19.3%), and 55 to 64 (19.3%). Males and females represent an equal proportion of those willing to accept different employment.

EDUCATION AND TRAINING

More than three-quarters (78.3%) of the **willing to change** respondents in the ALM have some post high school education and 53.8 percent possess two-year degrees or higher. The **willing to change** subset has a slightly higher education attainment level of 78.3 percent with some post-high school education compared to 76.1 percent of the **overall available workforce** of 211,104.

Almost half (46.2%) of the **willing to change** respondents stated that educational opportunities would be an important consideration in accepting a new job.

T7: Willing to Change Education Attainment			
Characteristics	Overall EDC ALM	Core EDC ALM	Non-Core ALM
Less than a High School Diploma	3.2%	2.7%	3.6%
High School Diploma	18.5%	20.3%	16.9%
Some College	24.5%	25.7%	23.5%
Associate or Tech Degree	16.9%	15.5%	18.1%
Bachelors Degree	25.8%	25.0%	26.5%
Masters or Law Degree	9.9%	9.5%	10.2%
Doctoral Degree	1.3%	1.4%	1.2%
<i>Willing to Change/Right Opportunity</i>	140,286	65,041	75,245

WORK EXPERIENCE AND ENVIRONMENT

To gain perspective on the types of workers available for new or different employment, survey respondents were asked to classify their previous occupations and industry experience as *Goods Producing* (manufacturing, construction, mining, or agriculture), *Service Providing* (retail, healthcare, etc.), or *Government/Education*. While some occupations may be similar in different industries, the impact of the work and work culture is affected by the type of industry. The **overall willing to change** segment consists of 29.9 percent in the *Goods Producing* sector.

T8: Willing to Change Primary Industry Sector/Past Employment			
Characteristics	Overall EDC ALM	Core EDC ALM	Non-Core ALM
Goods Producing (Mfg./Const./Ag./Mining)	29.9%	29.0%	23.1%
Service Providing (Retail, Healthcare, etc.)	51.6%	57.4%	34.9%
Government/Education (Local, State, Fed.)	18.5%	13.5%	17.2%
<i>Willing to Change/Right Opportunity</i>	140,286	65,041	75,245

Seeking and Willing to Change Jobs

The subset of **seeking and willing to change** is identified as those who are actively looking to change jobs but are still currently employed. The 45,034 in this group are already included in 140,286 and are not counted twice. By comparing the two different tables **willing to change** (T6) and **seeking and willing to change** (T9), one can see some significant differences. The **seeking and willing to change** have less years on the job, lower current wages, lower household income, a greater degree of second or part-time jobs, a higher percentage with no health insurance and lower levels of education (T7 and T10).

AGE AND GENDER

The mean or average age of this group is 44 years of age compared to the same age of all those **working** in the ALM. The **willing to change** respondents are distributed among all age ranges: 18 to 24 (19.0%), 25 to 34 (19.0%), 35 to 44 (31.0%), 45 to 54 (14.3%), and 55 to 64 (16.7%). Males represent a slightly greater proportion (52/48) than females of those seeking and willing to accept different employment.

T9: Seeking and Willing Working Workforce Characteristics			
Characteristics	Overall EDC ALM	Core EDC ALM	Non-Core ALM
<i>Seeking and Willing to Change Jobs</i>	45,934	27,563	18,371
Years on Job	9.5	9.2	8.4
Willing to Commute One Way	32.5	33.1	29.9
Current Average Wage	\$15.06	\$15.50	\$12.93
Desired Average Wage	\$18.25	\$18.00	\$17.68
Household Income	\$53,740	\$54,658	\$50,080
Average Age	43.7	44.3	44.5
Male/Female Ratio	52/48	50/50	51/49
Working a Second or Part Time Job	17.2%	16.7%	17.9%
Only Job Part Time or Temporary	25.0%	30.9%	17.9%
Employer Doesn't Provide Health Insurance	32.8%	30.9%	39.3%
Has No Health Insurance	42.2%	38.1%	42.9%
Has No Retirement Benefits	42.2%	38.1%	42.9%
<i>Seeking and Willing to Change Jobs</i>	45,934	27,563	18,371

EDUCATION AND TRAINING

More than half (70.3%) of the **seeking and willing to change** respondents in the ALM have some post high school education and 45.3 percent have two-year degrees or higher. The **seeking and willing to change** subset has a slightly lower education attainment level of 70.3 percent with some post-high school education compared to 76.1 percent of the **overall available workforce** of 211,104.

Over half (62.5%) of the **seeking and willing to change** respondents stated that educational opportunities would be an important consideration in accepting a new job.

T10: Seeking and Willing Education Attainment			
Characteristics	Overall EDC ALM	Core EDC ALM	Non-Core ALM
Less than a High School Diploma	3.1%	2.4%	3.6%
High School Diploma	26.6%	28.9%	17.9%
Some College	25.0%	26.2%	35.7%
Associate or Tech Degree	18.8%	9.5%	28.6%
Bachelors Degree	17.2%	19.1%	10.7%
Masters or Law Degree	7.8%	9.5%	3.7%
Doctoral Degree	1.6%	7.4%	0.0%
<i>Seeking and Willing to Change Jobs</i>	45,934	27,567	18,371

WORK EXPERIENCE AND ENVIRONMENT

To gain perspective on the types of workers available for new or different employment, survey respondents were asked to classify their previous occupations and industry experience as *Goods Producing* (manufacturing, construction mining or agriculture), *Service Providing* (retail, healthcare, etc.), or *Government/Education*. While the occupations may be similar in different industries, the focus of the work and work culture may be quite different in different types of industry. The overall **seeking and willing to change population** consists of 31.3 percent in the *Goods Producing* sector.

T11: Seeking and Willing Primary Industry Sector/Past Employment			
Characteristics	Overall EDC ALM	Core EDC ALM	Non-Core ALM
Goods Producing (Mfg./Const./Ag./Mining)	31.3%	26.2%	35.7%
Service Providing (Retail, Healthcare, etc.)	54.7%	59.5%	53.6%
Government/Education (Local, State, Fed.)	14.0%	14.3%	10.7%
<i>Seeking and Willing to Change Jobs</i>	45,934	27,567	18,371

Underemployed and Willing to Change Jobs

The subset of **underemployment and willing to change** is identified as those who believe they are currently underutilized in their jobs. This group is a primary source of good employees as these individuals are now **working** but desire a better job and also possess the skills, education, and experience to qualify for better jobs. They claim to have additional education and/or job training; a previous job that required more skill and/or education; or a current job that does not require the level of training and/or education attained. The key to this definition is education, training, or experience. Current pay or part-time status alone is not a qualifying factor for **underemployment** status in this study.

The 38,080 in this group are included in 140,286 members of the **working available workforce**. By looking at the two tables one can see some similarities with **seeking and willing to change** (T9) subset and the **underemployed** (T12).

T12: Underemployed and Willing Working Workforce Characteristics			
Characteristics	Overall EDC ALM	Core EDC ALM	Non-Core ALM
Underemployment/Right Opportunity	38,080	17,654	20,426
Years on Job	10.9	11.1	10.6
Willing to Commute One Way	33.1	31.0	34.9
Current Average Wage	\$16.93	\$15.63	\$17.92
Desired Average Wage	\$18.83	\$18.55	\$19.08
Household Income	\$55,764	\$62,600	\$51,397
Average Age	44.4	44.2	44.5
Male/Female Ratio	50/50	49/51	51/49
Working a Second or Part Time Job	17.1%	18.4%	15.9%
Only Job Part Time or Temporary	34.1%	31.6%	36.3%
Employer Don't Provide Health Insurance	34.2%	36.8%	31.8%
Has No Health Insurance	32.9%	26.3%	38.6%
Has No Retirement Benefits	40.2%	42.1%	38.6%
Underemployment/Right Opportunity	38,080	17,954	20,426

AGE AND GENDER

The mean or average age of this group is 44 years of age. The *underemployed and willing to change* respondents are distributed among all age ranges: 18 to 24 (10.5%), 25 to 34 (13.2%), 35 to 44 (23.7%), 45 to 54 (18.4%), and 55 to 64 (34.2%). Males and females represent an equal proportion of those *underemployed and willing* to accept different employment.

T13: Underemployed and Willing Education Attainment			
Characteristics	Overall EDC ALM	Core EDC ALM	Non-Core ALM
Less than a High School Diploma	4.9%	2.6%	6.8%
High School Diploma	12.2%	13.2%	11.4%
Some College	28.1%	28.9%	27.3%
Associate or Tech Degree	18.3%	18.4%	18.2%
Bachelors Degree	24.4%	26.3%	22.7%
Masters or Law Degree	11.0%	7.9%	13.6%
Doctoral Degree	1.2%	2.6%	0.0%
Underemployment/Right Opportunity	38,080	17,654	20,426

EDUCATION AND TRAINING

More than three-quarters (82.9%) of the *underemployed and willing to change* respondents in the ALM have some post-high school education and 54.8 percent have two-year degrees or higher. The *underemployed* subset has the highest education attainment level of 82.9 percent with some post-high

school education compared to 76.1 percent of the overall available workforce and higher than all the other group subsets. This area also shows the greatest differences between this group and **seeking and willing to change** (T10 and T13).

Over half of the **underemployed and willing to change** respondents (58.3%) stated that educational opportunities would be important in accepting a new job.

T14: Underemployed and Willing Primary Industry Sector/Past Employment			
Characteristics	Overall EDC ALM	Core EDC ALM	Non-Core ALM
Goods Producing (Mfg./Const./Ag./Mining)	23.2%	18.4%	27.3%
Service Providing (Retail, Healthcare, etc.)	64.6%	71.1%	59.1%
Government/Education (Local, State, Fed.)	12.2%	10.5%	13.6%
Underemployment/Right Opportunity	38,080	17,654	20,426

WORK EXPERIENCE AND ENVIRONMENT

To gain perspective on the types of workers available for new or different employment, survey respondents were asked to classify their previous occupations and industry experience as *Goods Producing* (manufacturing, construction mining or agriculture), *Service Providing* (retail, healthcare, etc.), or *Government/Education*. While the occupations may be similar in different industries, the focus of the work and work culture may be quite different in different types of industry. The **underemployed and willing** group consists of 23.2 percent in the *Goods Producing* sector.

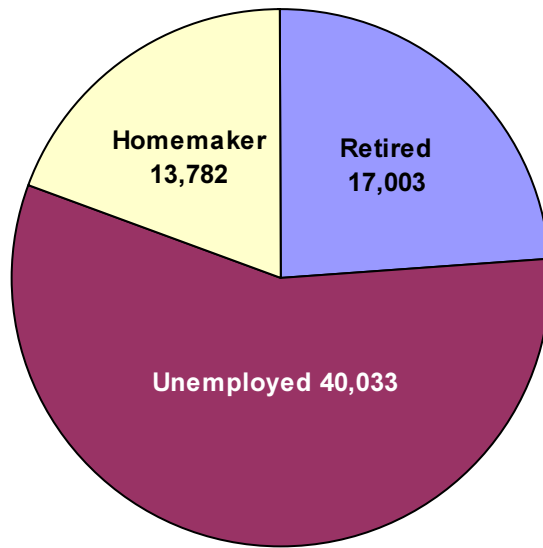
NON-WORKING AVAILABLE WORKFORCE

Using only the **unemployed** persons as determined by the Bureau of Labor Statistics (BLS) would overlook sources of potential labor like **homemakers** and **retirees** who would be willing to enter or reenter the workforce if the right opportunity arose. GSG uses **non-working** as part of its Area Labor Market (ALM) studies which includes three subsets: the **unemployed**, **homemaker**, and **retirees** in the **non-working** segment.

Including these subsets in the analysis provides a more accurate assessment of the potential workforce in the ALM. Of the respondents interviewed, 29.2 percent stated they were **non-working**. By questioning these respondents about seeking employment or their willingness to accept an employment offer, the survey identified 52.4 percent who stated they would accept with the right opportunity.

Analyzing the subsets provides unique characteristics for better understanding the **available workforce**. A further distinction in the **non-working** group of those actively seeking employment and those not actively seeking employment but **willing to work** or accept employment with the right opportunity is not pursued due to various incentives or disincentives for both employers and/or potential workers. These incentives and/or disincentives may in some instances change the threshold of what is the right opportunity. The total **available workforce** from the **non-working** segment **seeking or willing** to enter the workforce is 70,818. The following sections provide a profile of the **non-working unemployed**, **homemakers**, and retired respondents.

C2: Seeking or Willing to Accept Employment



Unemployed

Of those who responded who are **unemployed**, 85.6 percent are seeking or willing to accept employment with the right opportunity. It is estimated that 40,033 are willing to return to work if presented with the right opportunity. Also included are those who are actively seeking employment. The following table (T15) provides the general characteristics of this subdivision.

AGE AND GENDER

The mean or average age of this group is 40 years of age compared with 44 years of age in the overall **working** segment. The **unemployed** respondents are distributed among all age ranges: 18 to 24 (15.6%), 25 to 34 (28.1%), 35 to 44 (15.6%), 45 to 54 (25.0%), and 55 to 64 (15.6%). Men make up 61 percent and females 39 percent **seeking or willing** to accept employment.

T15: Unemployed Non-Working Available Workforce Characteristics			
Characteristics	Overall EDC ALM	Core EDC ALM	Non-Core ALM
Seeking or Willing	40,033	21,001	19,032
Commute One Way	45.0	50.6	39.2
Desired Average Wage	\$14.07	\$15.92	\$1214
Average Age	40.3	39.3	41.4
Male/Female Ratio	61/39	71/29	50/50
Household Income	\$39,940	\$46,864	\$32,325
Unemployed Available Workforce	40,033	21,001	19,032

T16: Unemployed Education Attainment			
Characteristics	Overall EDC ALM	Core EDC ALM	Non-Core ALM
Less than a High School Diploma	16.4%	18.8%	13.8%
High School Diploma	26.2%	21.9%	31.0%
Some College	31.2%	25.0%	37.9%
Associate or Tech Degree	9.8%	12.5%	6.9%
Bachelors Degree	9.8%	9.4%	10.3%
Masters or Law Degree	6.6%	12.5%	0.0%
Doctoral Degree	0.0%	0.0%	0.0%
Unemployed <i>Available Workforce</i>	40,033	21,001	19,032

EDUCATION AND TRAINING

More than half (57.4%) of the **unemployed** respondents in the ALM have some post-high school education and 26.2 percent have two-year degrees or higher. In comparing the **unemployed** subset to other subsets shows the **unemployed** tend to be the least educated with only 57.4 percent having some college and compares to the overall at 76.1 percent.

Educational opportunities would be an important consideration in accepting a new job to 67.2 percent of the **unemployed** respondents.

T17: Unemployed Primary Industry Sector/Past Employment			
Characteristics	Overall EDC ALM	Core EDC ALM	Non-Core ALM
Goods Producing (Mfg./Const./Ag./Mining)	33.5%	44.8%	22.6%
Service Providing (Retail, Healthcare, etc.)	53.1%	40.7%	65.6%
Government/Education (Local, State, Fed.)	13.4%	19.5%	11.9%
Unemployed <i>Available Workforce</i>	40,073	21,001	19,032

WORK EXPERIENCE AND ENVIRONMENT

To gain perspective on the types of skills possessed by the **available workforce**, especially those in the **non-working** segment, survey respondents were asked questions about the type of industry where their previous occupations and industry experience were gained. These categories include *Goods Producing* (manufacturing, construction mining or agriculture), *Service Providing* (retail, healthcare, etc.), or *Government/Education*. While the occupations may be similar in different industries, the focus of the work and work culture may be quite different in different types of industry. The **overall unemployed** segment consists of 33.5 percent in the *Goods Producing* sector.

Homemakers

Of those who responded as *homemakers*, it is estimated that 13,782 (40.2%) are willing to enter or return to work if presented with the right opportunity. This also includes those who are actively seeking employment. The following table (T18) provides the general characteristics of this subset.

AGE AND GENDER

The mean or average age of this group is 40 years of age compared with 44 years of age in the *overall working* group. The *homemaker* respondents are distributed among all age ranges: 18 to 24 (7.7%), 25 to 34 (30.8%), 35 to 44 (15.4%), 45 to 54 (15.4%), and 55 to 64 (30.7%). Men make up 9 percent and females 91 percent seeking or willing to accept employment.

T18: Homemaker Non-Working Workforce Characteristics			
Characteristics	Overall EDC ALM	Core EDC ALM	Non-Core ALM
Seeking or Willing	13,782	8,532	5,250
Commute One Way	26.4	25.8	27.5
Desired Average Wage	\$12.37	\$12.82	\$11.55
Average Age	40.0	39.1	41.4
Male/Female Ratio	9/91	6/94	13/87
Household Income	\$58,143	\$49,900	\$78,750
Homemaker Available Workforce	13,782	8,532	5,250

EDUCATION AND TRAINING

More than half (80.9%) of the *homemaker* respondents in the ALM have some post-high school education with 52.3 percent earning two year degrees or higher. In comparing the *homemaker* subset to the other subsets shows *homemakers* tend to be a more educated with 80.9 percent with some college compared to the overall available workforce at 76.1 percent.

Educational opportunities would be an important consideration in accepting a new job to 42.9 percent of the *homemaker* respondents.

T19: Homemaker Education Attainment			
Characteristics	Overall EDC ALM	Core EDC ALM	Non-Core ALM
Less than a High School Diploma	0.0%	0.0%	0.0%
High School Diploma	19.1%	15.4%	12.5%
Some College	28.6%	23.1%	25.0%
Associate or Tech Degree	14.8%	15.4%	6.3%
Bachelors Degree	38.1%	30.8%	50%
Masters or Law Degree	0.0%	0.0%	0.0%
Doctoral Degree	0.0%	0.0%	0.0%
Homemaker Available Workforce	13,782	8,532	5,250

T20: Homemaker Primary Industry Sector/Past Employment			
Characteristics	Overall EDC ALM	Core EDC ALM	Non-Core ALM
Goods Producing (Mfg./Const./Ag./Mining)	9.5%	15.4%	0.0%
Service Providing (Retail, Healthcare, etc.)	76.2%	63.2%	87.5%
Government/Education (Local, State, Fed.)	14.3%	15.4%	12.5%
Homemaker <i>Available Workforce</i>	13,782	8,532	5,250

WORK EXPERIENCE AND ENVIRONMENT

To gain perspective on the types of skills possessed by the *available workforce*, especially those in the *non-working* segment, survey respondents were asked questions about the type of industry where their previous occupations and industry experience were gained. These categories include *Goods Producing* (manufacturing, construction mining or agriculture), *Service Providing* (retail, healthcare, etc.), or *Government/Education*. While the occupations may be similar in different industries, the focus of the work and work culture may be quite different in different types of industry. The *homemaker* subset consists of 9.5 percent with experience in the *Goods Producing* sector.

Retired

Of those who responded as being *retired*, it is estimated that 17,003 (31.6%) are willing to enter or return to work if presented with the right opportunity. This includes those who are actively seeking employment. The following table further segments the **overall EDC ALM** into two geographic areas, which consists of the Big A core and the six-county surrounding labor shed. The following table (T21) provides the general characteristics of this subdivision.

AGE AND GENDER

The mean or average age of this group is 58 years of age. The retired respondents are distributed in the 45 to 64 age range. Men make up 57 percent and female 43 percent seeking or willing to accept employment.

T21: Retired Non-Working Workforce Characteristics			
Characteristics	Overall EDC ALM	Core EDC ALM	Non-Core ALM
Seeking or Willing	17,003	10,500	6,503
Commute One Way	24.9	27.3	21.3
Desired Average Wage	\$14.67	\$13.20	\$17.42
Average Age	58.4	59.1	51.3
Male/Female Ratio	57/43	53/47	61/39
Household Income	\$88,053	\$61,083	\$139,285
Retired <i>Available Workforce</i>	17,003	10,500	6,503

T22: Retired Education Attainment			
Characteristics	Overall EDC ALM	Core EDC ALM	Non-Core ALM
Less than a High School Diploma	0.0%	0.0%	0.0%
High School Diploma	19.2%	18.8%	18.8%
Some College	26.9%	77.5%	37.5%
Associate or Tech Degree	7.7%	6.2%	6.2%
Bachelors Degree	23.1%	25.0%	25.0%
Masters or Law Degree	23.1%	12.5%	12.5%
Doctoral Degree	0.0%	0.0%	0.0%
Retired <i>Available Workforce</i>	17,003	10,500	6,503

EDUCATION AND TRAINING

More than three-quarters (80.8%) of the retired respondents in the ALM have some post-high school education with 53.9 percent possessing two-year degrees or higher. In comparing **retirees** to the other subsets shows the **retirees** have a higher level of education with 80.8 percent having some college compared to the overall at 76.1 percent.

Only 38.5 percent of the **retired** respondents stated that educational opportunities would be important in accepting a new job.

T23: Retired Primary Industry Sector/Past Employment			
Characteristics	Overall EDC ALM	Core EDC ALM	Non-Core ALM
Goods Producing (Mfg./Const./Ag./Mining)	38.5%	50.0%	20.0%
Service Providing (Retail, Healthcare, etc.)	19.2%	25.0%	10.0%
Government/Education (Local, State, Fed.)	42.3%	25.0%	70.0%
Retired <i>Available Workforce</i>	17,003	10,500	6,503

WORK EXPERIENCE AND ENVIRONMENT

To gain perspective on the types of skills possessed by the **available workforce**, especially those in the **non-working** segment, survey respondents were asked questions about the type of industry where their previous occupations and industry experience were gained. These categories include *Goods Producing* (manufacturing, construction mining or agriculture), *Service Providing* (retail, healthcare, etc.), or *Government/Education*. While the occupations may be similar in different industries, the focus of the work and work culture may be quite different in different types of industry. The **retiree** subset consists of 38.5 percent with experience in the *Goods Producing* sector.

IV. DESIRED WAGES AND BENEFITS

Wages and benefits rank high among *workers* and *non-workers* in the *available workforce* when making an opportunity assessment for potential employment. While wage and benefit costs are important for employers when assessing a workforce market, of equal or greater importance is the quality and availability of the necessary skills and talent of the labor force. The greater the quality and availability of the skills and talent for increased productivity, the more likely higher wages and benefits will follow. Competitiveness in the global economy means producing goods and services competitive in price and quality in the market place.

BENEFIT OPPORTUNITY ASSESSMENT

Salary and wages appear to be a top motivator for changing jobs, with retirement, flexible hours, and job closer to home following. Health benefits rated higher for the Big A county EDC *Core* than the *Non-core* area, while flexible hours rated higher than retirement benefits for the *Non-core ALM* (T24).

T24: Job Change Inducement by Area Labor Market			
Salary/Benefits	Overall EDC ALM	Core EDC ALM	Non-Core ALM
Salary/Wages	73.2%	74.3%	72.1%
Retirement Benefits	60.9%	61.2%	60.5%
Flexible Hours	60.1%	58.3%	61.9%
Job Closer to Home	47.1%	45.8%	48.3%
Health Benefits	46.8%	49.3%	44.5%
Education Opportunities	38.2%	38.8%	37.6%
Some Other Opportunity	35.5%	35.9%	35.1%
Different Community	20.0%	19.2%	20.7%
On-site Childcare	16.6%	19.5%	13.8%

The *non-working* group in the *available workforce* has a higher preference for flexible hours and jobs closer to home than retirement and health benefits which deviates from the remainder of the *available workforce*. The *underemployed*, which is a subset of the *working available workforce*, has a higher percentage of interest in all inducements to change jobs than the *working* segment. The *underemployed* also have lower wages and benefits and higher education attainment levels (T25).

T25: Job Change Inducement by Available Workforce				
Salary/Benefits	Overall	Working	Non-Working	Underemployed
Salary/Wages	87.6%	88.4%	85.2%	89.0%
Retirement	72.0%	74.2%	65.7%	79.3%
Flexible Hours	71.0%	68.5%	77.8%	69.5%
Health Benefits	57.6%	54.3%	66.7%	63.4%
Job Closer to Home	56.6%	49.7%	75.9%	54.9%
Education Opportunities	49.3%	47.0%	55.6%	57.3%
Some Other Opportunity	46.1%	47.4%	42.6%	53.7%
Different Community	25.6%	26.2%	24.1%	26.8%
On-site Childcare	19.0%	14.9%	30.6%	13.4%

DESIRED WAGE RATE RANGES

All wage and salary requirements expressed by respondents are presented in hourly rates. Appendix A presents an easy conversion table to annual, monthly, or weekly rates. Seven percent (7%) of the **available workforce** would be interested in employment with a wage of up to \$9.99 per hour. It is estimated that 150,474 people or 71.2 percent of **available workforce** would be interested in a new or different employment with a wage of up to \$20.00. Fourteen percent would require \$30.00 or more for a new job opportunity. Those that currently hold jobs would require a higher desired wage than the **non-working** in the **available workforce**.

T26: Available Workforce Desired Wage Rate Ranges			
\$9.99 or Less	\$10.00 - \$10.99	\$11.00 - \$11.99	\$12.00 - \$12.99
14,882	19,843	8,819	24,803
\$13.00 - \$13.99	\$14.00 - \$15.99	\$16.00 - \$17.99	\$18.00 - \$19.99
14,331	26,457	20,945	20,394
\$20.00 - \$21.99	\$22.00 - \$24.99	\$25.00 - \$27.99	\$28.00 - \$30.99
8,278	8,258	6,614	9,370
\$31.00 - \$33.99	\$34.00 - \$36.99	\$37.00 - \$39.99	\$40.00 or More
3,858	8,268	7,165	8,819

T27: Desired Wage Rate by Area Labor Market						
	Overall EDC ALM		Core EDC ALM		Non-Core ALM	
Wage Rate	Available Workforce	Percent	Available Workforce	Percent	Available Workforce	Percent
\$9.99 or Less	14,882	7.0%	6,181	5.9%	8,655	8.2%
\$10.00 - \$14.99	84,331	39.9%	46,075	43.9%	38,409	36.2%
\$15.00 - \$19.99	51,260	24.3%	27,533	26.2%	23,803	22.4%
\$20.00 - \$24.99	16,535	7.8%	5,619	5.3%	10,819	10.2%
\$25.00 - \$29.99	14,331	6.8%	7,305	7.0%	7,033	6.6%
\$30.00 - \$34.99	8,268	3.9%	2,809	2.7%	5,410	5.1%
Over \$35.00	21,496	10.2%	9,552	9.1%	11,901	11.2%
Total:	211,104	100.0%	105,074	100.0%	106,030	100.0%

By comparing the wage rate ranges by area labor market location (T27) and by *working* and *non-working available workforce* groups (T28), the various preferences are more focused.

T28: Desired Wage Rate by Available Workforce Group								
	Overall		Working		Non-Working		Underemployed	
Wage Rate	Available Workforce	Percent	Available Workforce	Percent	Available Workforce	Percent	Available Workforce	Percent
\$9.99 or Less	14,882	7.0%	4,461	3.2%	12,747	18.0%	1,904	5.0%
\$10.00 - \$14.99	84,331	39.9%	46,101	32.9%	42,491	60.0%	12,376	32.5%
\$15.00 - \$19.99	51,260	24.3%	40,153	28.6%	8,498	12.0%	11,900	31.3%
\$20.00 - \$24.99	16,535	7.8%	13,880	9.9%	1,416	2.0%	4,284	11.3%
\$25.00 - \$29.99	14,331	6.8%	11,401	8.1%	2,125	3.0%	3,808	10.0%
\$30.00 - \$34.99	8,268	3.9%	6,940	4.9%	708	1.0%	1,904	5.0%
Over \$35.00	21,496	10.2%	17,350	12.4%	2,833	4.0%	1,904	5.0%
Total:	211,104	100.0%	140,286	100.0%	70,818	100.0	38,080	100.0%

DESIRED WAGE RATE BY INDUSTRY AND OCCUPATION

T29: Desired Wage Rate by Industry			
	Overall EDC ALM	Core EDC ALM	Non-Core ALM
Government / Education (Local, State, or Federal)	\$22.28	\$21.39	\$22.78
Goods Producing (Manufacturing, Construction, Agriculture, Mining)	\$19.54	\$19.08	\$19.99
Service Providing (Retail, Healthcare, etc.)	\$17.96	\$16.68	\$19.34

The *Government/Education* industry sector has the highest desired wage of \$22.28 with the *Service Providing* industry sector having the lowest at \$17.96.

T30: Desired Wage Rate by Occupation			
	Overall EDC ALM	Core EDC ALM	Non-Core ALM
Management	\$33.27	\$22.58	\$37.86
Production/Repair/Installation	\$20.22	\$22.46	\$18.70
Professional/Technical	\$22.71	\$22.76	\$23.04
Services	\$19.18	\$17.12	\$21.62
Non-Working Available	\$13.81	\$14.40	\$13.52

The management occupation group has the highest desired wage at \$33.27 and those currently **non-working** have the lowest at \$13.81.

OCCUPATION ACTUAL AND DESIRED WAGES

The following table (T31) provides a detailed analysis of the *available workforce* by occupation, average actual wage, and average desired wage.

T31: Actual And Desired Occupation Wages			
	<i>Available Workforce</i>	Average Actual Wage	Average Desired Wage
Management	6,454	\$30.99	\$33.27
Managerial, Executive, Business Owners, Farmers, Supervisory	6,454	\$30.99	\$33.27
Production/Repair/Installation	18,696	\$20.22	\$20.76
Maintenance, Installations, and Repairs (Mechanic, Carpenter, Plumber, Electrician), etc.	9,183	\$19.17	\$20.41
Production: Factory Assembly, Fabrication, Construction, and Mining	9,513	\$20.85	\$21.05
Professional/Technical	37,742	\$21.51	\$22.71
Business Sales: Finance, Insurance, Real Estate, Wholesale, Industrial, etc.	9,383	\$23.13	\$23.27
Certified Professionals: Doctors, Lawyers, Engineers, Accountants, Professors, etc.	6,204	\$24.46	\$25.80
Computer Technology, Science, Math, and Engineering	7,738	\$22.32	\$23.22
Protective: Police/Fire/Military/Regulators/Investigators and Postal	1,030	\$10.50	\$14.60
Teachers, Instructors, Trainers, Writers, Researchers, etc.	13,387	\$18.52	\$20.00
Services	77,394	\$19.09	\$19.18
Administrative Support: Shipping/Receiving, Secretaries, Computer Operators, etc.	6,708	\$17.25	\$21.25
Business Office and Clerical Operations	8,238	\$18.95	\$19.50
Consumer Services, Retail, Restaurant, Hotel, Food Services, etc.	18,625	\$12.87	\$14.87
Delivery/Drivers/Couriers	1,545	\$19.20	\$21.40
Government Office and Clerical Operations	6,694	\$21.96	\$23.64
Health, Social, Community, Personal Care, and Recreation Services	20,652	\$18.04	\$18.40
Other Blue Collar: Laborers, Farm Hand, Janitor, Warehouse Workers, etc.	10,813	\$16.49	\$16.69
Other White Collar Workers	4,119	\$28.86	\$30.33
Non-Working Available	70,818	\$0.00	\$13.81
Homemaker	13,782	\$0.00	\$12.37
Retired	17,003	\$0.00	\$14.67
Unemployed	40,033	\$0.00	\$14.07

Adjustments have been made to reflect anomalies in the survey data

V. COMMUTING PATTERNS AND PREFERENCES

The commute of the overall **working** workforce in the seven-county Area Labor Market ALM is 30.2 minutes/miles one way. The overall commute preference of the **available workforce** is 33.1 minutes/miles one way. The overall **available workforce** indicates it is open to commuting for the right employment opportunity. The table shows 167,719 people or 81.4 percent of the **available workforce** would commute more than 15 minutes/miles, one way, for work. It also shows that 74,659 people or 35.8 percent of the **available workforce** are willing to travel more than 30 minutes/miles and 6,349 people 3.0 percent will commute more than 60 minutes/miles.

T32: Distance/Time Travel One Way by Area Labor Market						
	Overall EDC ALM		Core EDC ALM		Non-Core ALM	
	Population	Percent	Population	Percent	Population	Percent
61 Miles/Minutes or More	6,349	3.0%	3,791	3.6%	2,586	2.4%
46-60 Miles/Minutes	42,856	20.3%	17,873	17.0%	24,827	23.4%
31-45 Miles/Minutes	26,454	12.5%	16,790	16.0%	9,827	9.3%
26-30 Miles/Minutes	45,501	21.6%	18,957	18.0%	26,378	24.9%
16-25 Miles/Minutes	46,559	22.1%	23,831	22.7%	22,758	21.5%
11-15 Miles/Minutes	11,111	5.3%	7,041	6.7%	4,138	3.9%
10 or Less Miles/Minutes	32,274	15.3%	16,790	16.0%	15,517	14.6%
Total	211,104	100.0%	105,074	100.0%	106,030	100.0%

WILLINGNESS TO COMMUTE BY AVAILABLE WORKFORCE GROUPS

Where individuals live within the ALM will influence their desire to commute to work. The transportation routes and options to employment centers also have a big influence where people work. The community/city may be the largest economic center for many of the smaller communities in the area. Individuals from the surrounding communities seeking job opportunities and competitive wages/benefits may be resigned to the fact that they will have to commute some distance to a new employer.

The following table illustrates the different commuting preferences of those who are employed and those who are non-employed. Those who are employed show a relative similarity of about 31 to 33 minutes/miles one way to work since they are already employed and their urgency for employment is less than those who are non-employed. The three groups in the **non-working** group show a considerable difference in that **unemployed** are willing to travel further and are more open in their employment options than either the **homemaker** or the **retirees**. The **non-working homemaker** and **retirees** prefer a shorter commute but also are more open to part-time and more flexible work arrangements. The average distance that the **homemaker** in ALM is willing to travel is 26.4 minutes/miles one way. In general, **retired** people are not as willing to commute long distances to work; however, those in the seven-county ALM are willing to travel 24.9 minutes/miles one way for employment opportunities.

T33: Working and Non-Working Group Distance/Time Travel			
	Overall EDC ALM	Core EDC ALM	Non-Core ALM
Working Available Workforce			
Willing To Change	31.9	31.5	32.3
Seeking Different Employment	32.5	33.1	29.9
Underemployed	33.1	31.0	34.9
Non-Working Available Workforce			
Unemployed	45.0	50.6	39.2
Homemaker	26.4	25.8	27.5
Retired	24.9	27.3	21.3

WILLINGNESS TO COMMUTE BY OCCUPATION AND INDUSTRY

It is usually easier to change from one major industry group to another than it is from one primary occupation field to another. While skills and occupation may be similar in the different industry groups, personal attitudinal characteristics, sometimes known as soft skills, may be more important to workers and employers where focus is to people and customer service vs. systems and process. There may also be differences in wages and benefits and other work-related characteristics.

T34: Commuting by Occupation Group	
Distance/Time TRAVEL ONE WAY	
Management	39.2
Production/Repair/Installation	33.8
Professional/Technical	31.9
Services	30.8
<i>Non-Working Available Workforce</i>	36.2
*Overall Average	33.1
*Overall Median	30.0

*includes all categories

T35: Commuting by Industry Type	
Distance/Time TRAVEL ONE WAY	
Goods Producing	31.4
Government/Education	38.8
Service Providing	32.1

CHANGING PRIMARY EMPLOYMENT FIELD

Changing jobs from one field to a different type of position is one way commuting patterns can change over time. For many individuals changing jobs to another employment field may not be something they are willing to do. The adaptability and flexibility of the workforce is important in the creation of new jobs and may require job training and other type of programs where jobs disappear because of competition and technology. If a large percentage of those employed and non-employed are unwilling to change their occupations or job positions, it could limit the type of employer who can enter the area labor market.

The following table shows the percentage of those in the various *available workforce* groups **willing to change** their primary employment field.

T36: Willing To Change Primary Employment Field			
	Overall Population	Willing To Change	Percent
Working (Right Opportunity)			
Willing To Change	140,286	97,815	69.7%
Seeking Different Employment	45,934	36,608	79.7%
Underemployed	38,080	29,721	78.0%
Non-Working (Right Opportunity)			
Unemployed	40,033	28,220	70.5%
Homemaker	13,782	7,875	56.7%
Retired	17,003	13,125	76.9%

LIVE/WORK ANALYSIS

Another way to quantify or measure commuting is to identify those individuals who live inside one county but work in a different county. Each respondent was asked two questions relevant to this section on commuting. In what county do you live? In what county do you work?

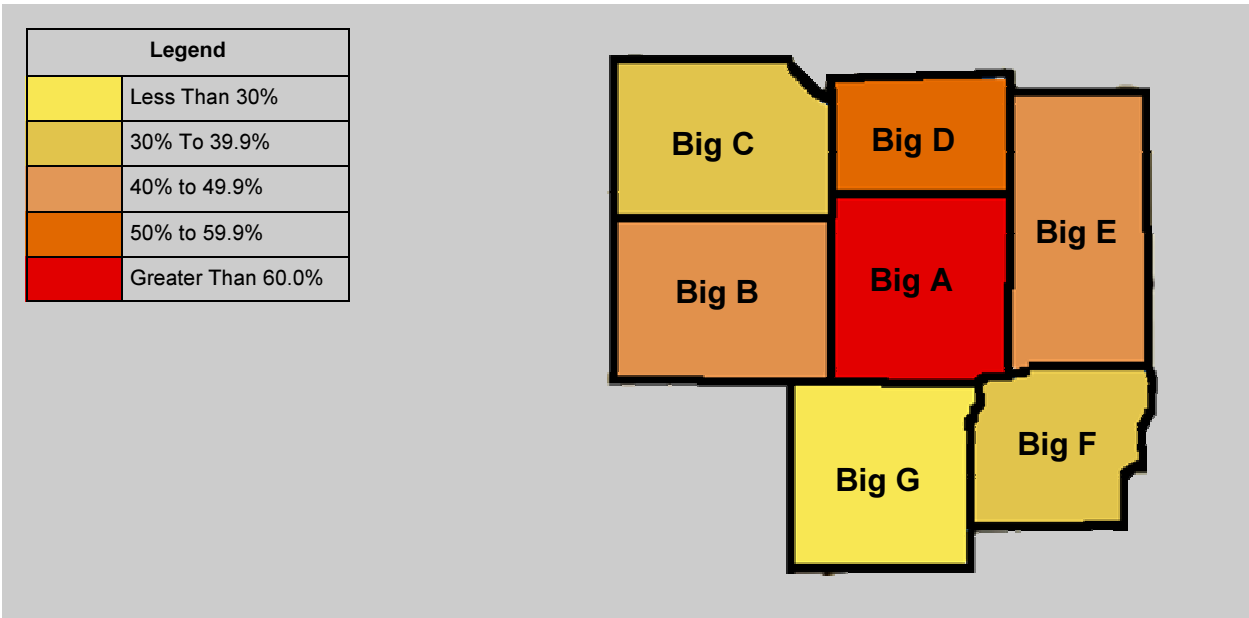
Approximately 8,239 people, or 8 percent of the employed workforce of the Big A county **EDC Core**, live inside the *Core* but work outside in the six-county **Non-core EDC ALM**. Another 2,060 people, or 2 percent of the **EDC Core** work outside the seven-county ALM.

Approximately 15,450, or 14 percent of the employed workforce of the six-county **EDC Non-core** live in the **Non-core ALM** but work in the Big A county **EDC core ALM**. Another 3,604 people, or 3 percent of the **EDC Non-core** county workers work outside the seven-county ALM.

Big A county **EDC Core** is the leading county for attracting out-of-county workers for employment. It has the largest net inflow of employed workers in the seven-county area labor market. While ??? has a large inflow of workers, it also has a large out-flow of commuting workers.

The following Live/Work Map is another way to show how counties differ in the retention of their in-county workforce. The map shows only the percentage of workers who responded that live and work in the same county and are 18 to 64 years old. It does not show the non-workers or those who commute outside the county for work, nor those who are under 18 or 65 and older who currently live and work in the county.

M2: Live/Work Map



VI. CONCLUSION

This study assesses the supply side of labor and provides information for the Progress EDC Area Labor Market about commuting patterns, current and desired wages, worker occupation and industry, experience, and education. The **available workforce** is determined from the workers and non-employed perspective and provides information for the supply side of labor markets. The demand side is determined from the employer's perspective and provides information about the quality.

While considerable information about workforce issues is available at the national and state level, less information is available at the local and regional level, with adequate data to make objective decisions. While employers are concerned about over-employment and workers with deficient skills and who are under-qualified, the worker and community are concerned about **underemployment** and workers who have excess skills who are over-qualified for those jobs. Although the dynamics of the workplace will not change dramatically, employers will continue to recruit the best employees with the best skills for the best value and workers will continue to seek the best jobs with the best compensation package and work environment. The balance for a competitive workforce is critical with the employer, community, education, and worker all having a major stake in developing a skilled and productive workforce.

With increasing workforce challenges for the future anticipated from the demographic changes in an aging population, the question of a more active approach to increasing the labor pool with productive workers is crucial. Weighing the cost for education and other programs with the social and economic benefits will be key in remaining competitive in a global economy.

APPENDICES

APPENDIX A—WAGE AND SALARY CONVERSION RATES

The following data represents pay rates in four different ways. All wage and salary rates reported in the interviews are presented in this report in hourly rates. Selected conversions may add perspective to the hourly rates. Figures presented below are rounded and based on a 40-hour workweek.

T37: Wage and Salary Conversion Chart			
Hourly	Weekly	Monthly	Annually
\$8.00	\$320.00	\$1,387.00	\$16,640.00
\$9.00	\$360.00	\$1,560.00	\$18,720.00
\$10.00	\$400.00	\$1,733.00	\$20,800.00
\$11.00	\$440.00	\$1,907.00	\$22,880.00
\$12.00	\$480.00	\$2,080.00	\$24,960.00
\$13.00	\$520.00	\$2,253.00	\$27,040.00
\$14.00	\$560.00	\$2,427.00	\$29,120.00
\$15.00	\$600.00	\$2,600.00	\$31,200.00
\$16.00	\$640.00	\$2,773.00	\$33,280.00
\$17.00	\$680.00	\$2,947.00	\$35,360.00
\$18.00	\$720.00	\$3,120.00	\$37,440.00
\$19.00	\$760.00	\$3,293.00	\$39,520.00
\$20.00	\$800.00	\$3,467.00	\$41,600.00
\$21.00	\$840.00	\$3,640.00	\$43,680.00
\$22.00	\$880.00	\$3,813.00	\$45,760.00
\$23.00	\$920.00	\$3,987.00	\$47,840.00
\$24.00	\$960.00	\$4,160.00	\$49,920.00
\$25.00	\$1,000.00	\$4,333.00	\$52,000.00
\$26.00	\$1,040.00	\$4,507.00	\$54,080.00
\$27.00	\$1,080.00	\$4,680.00	\$56,160.00
\$28.00	\$1,120.00	\$4,853.00	\$58,240.00
\$29.00	\$1,160.00	\$5,027.00	\$60,320.00
\$30.00	\$1,200.00	\$5,200.00	\$62,400.00
\$31.00	\$1,240.00	\$5,373.00	\$64,480.00
\$32.00	\$1,280.00	\$5,547.00	\$66,560.00
\$33.00	\$1,320.00	\$5,720.00	\$68,640.00
\$34.00	\$1,360.00	\$5,893.00	\$70,720.00
\$35.00	\$1,400.00	\$6,067.00	\$72,800.00
\$36.00	\$1,440.00	\$6,240.00	\$74,880.00
\$37.00	\$1,480.00	\$6,413.00	\$76,960.00
\$38.00	\$1,520.00	\$6,587.00	\$79,040.00
\$39.00	\$1,560.00	\$6,760.00	\$81,120.00
\$40.00	\$1,600.00	\$6,933.00	\$83,200.00
\$41.00	\$1,640.00	\$7,107.00	\$85,280.00
\$42.00	\$1,680.00	\$7,280.00	\$87,360.00

APPENDIX B—METHODOLOGY

The Progress, Somewhere Illinois Economic Development District Labor Shed or Area Labor Market (ALM) has a total Civilian Labor Force (CLF) as reported by the Bureau of Labor Statistics (BLS) of approximately 391,800 and a population of 748,400. The Growth Services Group (GSG) analysis presents an **available workforce** of 211,104 individuals.

Published government statistics report wages and employment for the entire workforce of an area, even though most of that workforce has no interest in changing jobs. This report, prepared by Growth Services, includes data on those people in the area who desire to change jobs and who would be potential workers of employers with the right opportunity. Whereas, the BLS reports average wages, this report provides the number of available workers for an employer in various desired wage ranges. It includes the **unemployed** who are actively looking for work as well as those who would enter the workforce under the right conditions or opportunities including **homemakers**, and **retirees**.

The key advantage of an Area Labor Market (ALM) analysis is that it expands the pool of potential workers by including workers excluded from the CLF. It also allows researchers to examine those members of the ALM pool who have a propensity to consider a job opportunity given their employment expectations. Employers evaluating the workforce component are also more likely interested in the population age segment 18-64 than in Civilian Labor Force representing *the civilian non-institutional population, 16 years of age and over classified as employed or unemployed*. Even with those restrictions, employers should note that, in practice, not all members of the **available workforce** would apply for a new job opportunity. The reader is further cautioned that, while the number of workers identified as available with their skills, experience, education, and costs as accurate, all of those individuals may not be acceptable candidates for an employer. Their previous work records, stability, integrity, intelligence, appearance, and other factors are not considered in this report.

A key source of good employees is the category of the **underemployed**, those individuals who are now **working** but desire a better job and who possess the skills, education, and experience to qualify for better jobs. **Underemployment** or underutilization of skills or experience is a significant issue in many communities and is an important element for employers assessing a community for location or expansion. The availability and cost of a highly skilled workforce are top location factors for businesses considering expansions or locations (Area Development Magazine, Annual Surveys).

The workforce analysis for the Progress Economic Development District (EDD) started in determining the boundaries of the Area Labor Market to be assessed. It was decided to include all adjacent counties to the EDD for a total of 13 counties in Central Illinois for the Area Labor Market. It was also decided to quantify those outside the Big A county EDD Core **willing to change** jobs and to commute and work in the EDD core area.

A random household telephone survey and interview was conducted within the seven county Area Labor Market during November 2010. The survey was designed by Growth Services and conducted by AnswerNet a large national market research firm. The overall goal of the process was to collect 700 valid phone surveys completed by respondents 18 to 64 years of age, which was achieved. Validity of the overall survey results is estimated at a confidence of ± 5 percent with query or drill down validity of $\pm 10-15$ percent. To ensure that an even distribution of respondents was achieved, a proportional number of completions was conducted by county population, age segments, and gender.

The survey was designed and developed by The Growth Services Group (GSG) and approved by the Progress Economic Development Corporation (EDU).

Survey interviewers posed questions to determine the respondents' gender, age, education level, place of residence, and current employment status. Employed respondents also identified the location of their employer, place of work, employer type by industry, occupation, years of employment in their occupation, employment status, current salary or wage, number of jobs currently held, and distance traveled to work. Employed respondents were then asked how likely they were to change employers or employment, how far they would be willing to travel for employment, the wage desired for them to change employment, and the benefits required for new employment. **Underemployment** was estimated by examining those employees who stated they possessed experience and additional education/skills that are not utilized in their current position.

Respondents in the 18-64 year age range self-identifying themselves as **working**, **unemployed**, **homemaker**, retired, military or student were asked a series of questions to determine what job characteristics and benefits were most important for them when considering employment, the reasons for unemployment, and how far they would be willing to travel to accept employment. Information on previous employers and skills was also gathered for these sectors. The employer type grouped employers into three main categories by *Goods Producing*, *Service Providing*, and *Government/ Education*. This allows employers evaluating the workforce to view occupations from a work culture perspective as well as skills and experience. Once completed, the results of the survey are compiled and queried or cross-tabulated to determine the relationship between the variables of the Big A county EDD, the outside nine-county ALM, and the entire survey. Documenting and analyzing the ALM survey results by area and characteristics provides new insight into the area's **available workforce** that is currently unavailable in any other form.

A final note, prior to data processing, the GSG applies a proprietary process to the analysis of the data to correct for invalid responses. An individual indicating they would take a new job but also indicating the desire for increased or decreased pay that is unreasonable is not counted in the results. Further the process considers that to be counted as **underemployed** an individual must be currently employed and willing to take another job at a pay rate commensurate with personal skills, education and experience.