

GSG

Labor Supply Certification

**Northeast Missouri Development
Partnership**



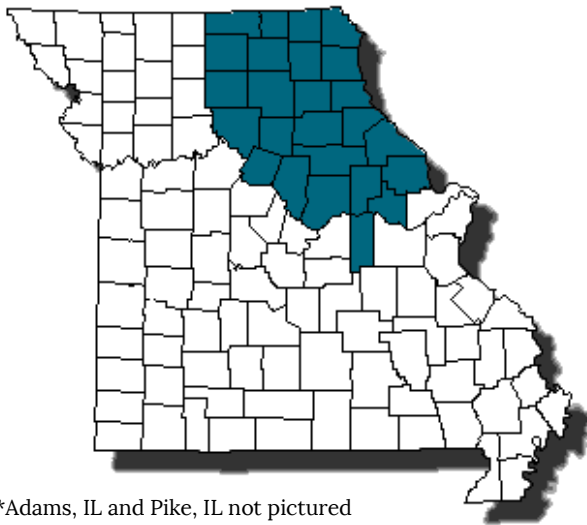
Underemployment

Available Skills

Desired Wages

Northeast Missouri Development Partnership Labor Supply Certification

Partners in Economic Development



NMDP Counties:

Adair, Adams, IL, Audrain,
Boone, Callaway, Chariton,
Clark, Gasconade, Howard,
Knox, Lewis, Linn, Lincoln,
Macon, Marion, Monroe,
Montgomery, Pike, IL,
Pike, MO, Putnam, Ralls,
Randolph, Schuyler,
Scotland, Shelby, Sullivan,
and Warren



For Opportunity and Growth

June 2015



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Executive Summary

Introduction

The Northeast Missouri Development Partnership (NMDP) commissioned a Labor Supply Study to measure the amount and quality of potential employees in a twenty-seven county area labor market (ALM). The twenty-seven counties are: Adair, Adams, IL, Audrain, Boone, Callaway, Chariton, Clark, Gasconade, Howard, Knox, Lewis, Linn, Lincoln, Macon, Marion, Monroe, Montgomery, Pike, IL, Pike, MO, Putnam, Ralls, Randolph, Schuyler, Scotland, Shelby, Sullivan, and Warren. The purpose of this report is to assess the available workforce for NMDP which in aggregate includes all twenty-seven counties as the Area Labor Market. The **total 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 occasion, it is advantageous to compare the **total available workforce** with data from all respondents. At that time the terminology used will be Census Population Estimate, Census 18–64 Population Estimate, Census Male Population Estimate, and Census Female Population Estimate.

General Findings, Opportunities, and Challenges

The Labor Supply Certification Study shows that NMDP 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 laborforce. The methodology of the research process is presented in Appendix B.

A subset of the **total 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 possess the skills, education, and experience to qualify them to do so. Of the 238,921 persons in the **total available workforce**, 67,779 are considered **underemployed** (see more on page 11).

**Total Available
Workforce**
238,921

Underemployed
67,779

With the right employment opportunities, the NMDP ALM appears positioned to retain and attract the talent necessary for growth of new and existing businesses representing regional, national, and international markets. The NMDP has several advantages. The location provides advantages with rural amenities with easy access to both two and four-year education institutions throughout the 27-county ALM. NMDP has a large and diverse workforce talent pool within easy commute to most local and county labor market centers and reflects the cost advantages of a rural setting.

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. The overall findings are as follows:

- About 42 percent (238,921 persons) of the Census Population Estimate in the Overall NMDP ALM is considered to be in the **total available workforce**.
- It is estimated 71,733 non-worker and 167,188 persons in the **worker available** segments of the **total available workforce** are **seeking different employment** or are **willing to change jobs** if the right opportunity arises.

- The **non-worker available** segment of the **total available workforce** is composed of 11,297 homemakers, 19,769 retirees, and 40,668 unemployed.
- The primary occupational clusters of the **worker available workforce** of the NMDP ALM include 6.5 percent in management, 13.2 percent in production/repair/installation, 23.1 percent in professional/technical, and 57.2 percent in service occupations with 71,733 available in the **non-worker available** in the unemployed, retired, and homemaker.
- Approximately 37 percent of the **total available workforce** (238,921 individuals) are **underemployed**.
- Thirty percent of the **total available workforce** would be interested in employment with a wage up to \$12.99 per hour. The average desired wage rate per hour for the occupational clusters shows that the professional/technical group is seeking \$21.75; production/repair/installation, \$20.71; service sector, \$17.53; and the **non-worker available** group, \$14.22.
- The education level of the **total available workforce** includes 65.1 percent with at least some college education and 95.4 percent with at least a high school diploma.
- The **total available workforce** is willing to commute an average of 26 minutes/miles. Currently, the working population commutes an average of about 27 minutes/miles. Of the **total available workforce**, 84.5 percent (230,068 people) would travel more than 10 minutes/miles one way for work while 35 percent (95,861) would commute more than 30 minutes/miles and 10.0 percent (26,841) would travel more than 50 minutes/miles.
- The overall average age of the **total available workforce** is 44.8. The average age of the **worker available workforce** by occupational cluster is 45.9 for management, 47.4 for production/repair/installation, 44.5 for professional/technical, and 42.3 for service sector.
- The top motivators for changing jobs among those open for the right opportunities are 68.1 percent salary, 65.6 percent Health Benefits, and 36.5 percent retirement.
- A majority, 88 percent, of the **worker 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 Overall ALM is 8.5 years which reflects both a stable and mature workforce.
- Approximately 9 percent (18,247 people) of the **worker available workforce** live inside the NMDP but work outside of the 27-county ALM.
- The **underemployed** provide the best opportunity for potential applicants. They represent a subset of the **total available workforce** that is normally more experienced, better educated, and more motivated than the **total available workforce** in general

Overview

Introduction

The primary purpose of the Northeast Missouri Development Partnership (NMDP) Labor Supply Study is to determine the number of workers available for employers considering expansions and major investments. The **total 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 a Labor Supply 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 Area Labor Market (ALM) pool who have a propensity to consider a job opportunity given their employment expectations.

The focus of this study is the NMDP 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 labor shed draws its commuting workers. Therefore, the NMDP ALM consists of twenty-seven counties which further provides smaller regions and labor sheds the opportunity to analyze their labor supply with a common methodology and database as determined by the Northeast Missouri Development Partnership. This report also includes workers who are commuting out of the designated twenty-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 **total available workforce** with data from all respondents. At that time the terminology used will be **Census 18–64 Population Estimate** and **Total Available Workforce**. The following table provides an overview of the **total available workforce** including the subset groups from the **worker available** and the **non-worker available** population within the ALM.

The findings from this survey are based on a type of stratified random telephone and social media campaign of 718 adults living in the 27 counties of the NMDP ALM. The NMDP contracted with Growth Services Group (GSG) to design and administer the Labor Supply Study. Answernet of Columbus, OH, conducted part of the survey interviews by phone and Notionfront of Moberly, MO provided the social media respondents. In 718 of these households an adult who is working or non-working between the ages of 18 and 64 agreed to participate in the survey. When all 718 respondents are included in the analysis, the survey aggregate results have a margin of error of +/- 5 percent. Subsets of the study group may have a higher error rate. The respondents from the random population of age 18-29 in subsets of the study may have a confidence level of 90% or less. A more detailed description of the survey process and methodology is presented in Appendix B.

Total Available Workforce (Overview)

Category 18-64	Overall	Percent
Total Available Workforce*	238,921	100.0%
Worker Available (Willing To Change)	167,188	70.0%
Underemployed	67,779	28.4%
Seeking Different Employment	41,232	17.3%
Willing To Change	58,177	24.3%
Non-worker Available (Willing To Work)	71,733	30.0%
Unemployed	40,668	17.0%
Homemaker	11,297	4.7%
Retired	19,769	8.3%

*While all those in the worker available workforce are willing to change with the right opportunity, 41,232 are seeking different employment and 67,779 are identified as underemployed and willing to change. The Willing to Change 58,177 are willing to change only for the right opportunity.

In the Non-worker 71,733, all are willing to work with the right opportunity. The unemployed (not currently working) includes both unemployed as defined by BLS as those who are seeking employment as well as those that have given up looking but are willing to accept the right opportunity and not covered in the BLS definition.

Available Workforce

Total Available Workforce

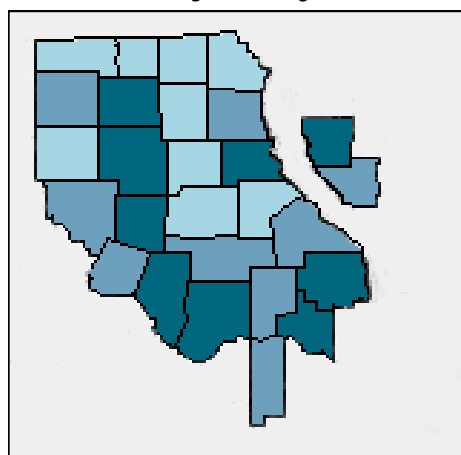
The following table describes the **total available workforce** in the NMDP 27-county ALM. The **total available workforce** for NMDP represents 238,921 people which consists of 167,188 working and 71,733 non-working. This demonstrates the workforce of the region is more than sufficient in scope and diversity to support most employers considering expansion or location in the larger labor markets of the NMDP ALM.

The map shows how each county in the ALM compares to all the other counties in terms of

percent of the **total available workforce** for jobs in the NMDP 27-county ALM. Each county is grouped into one of three categories specified in the legend, each of which are made up of nine counties.

The summary table for the NMDP ALM shows a **total available workforce** of 238,921, 41.2 percent of the estimated census NMDP population and 58.9 percent of the Estimated Census 18–64 NMDP Population. The table further presents the subsets of the **Total Available Workforce** and **Underemployed** by gender and age groupings. Men make up 50.3 percent and females 49.7 percent of the **total available workforce**. Those in the age 30–54 group consider themselves significantly more underutilized or **underemployed** at 47.5 percent than those in the age 55–64 at 15.0 percent.

Sources of Available Workforce in NMDP by County



Category	Color
Less than 1.3%	Light Blue
1.3% to 2.8%	Medium Blue
Greater than 2.8%	Dark Blue

Available Workforce Work Status

Category	Population	Percent
Total Available Workforce	238,921	100.0%
Worker Available	167,188	70.0%
Working Student	15,815	6.6%
Working (withholdings)	158,152	66.2%
Self-employed (no withholdings)	25,417	10.6%
Military	1,130	0.5%
Non-Worker Available	71,733	30.0%
Unemployed	37,279	15.6%
Homemaker	11,297	4.7%
Retired	19,769	8.3%
Non-working Student	3,389	1.4%

Summary Workforce Results

Characteristics	Overall	Percent
Population and Civilian Labor Force		
Census Population Estimate	648,554	100.0%
Census 18–64 Population Estimate	405,546	100.0%
Census 18–64 Male Population Estimate	199,872	49.3%
Census 18–64 Female Population Estimate	205,674	50.7%
Available Workforce		
Total Available Workforce	238,921	100.0%
Male	120,177	50.3%
Female	118,744	49.7%
Age 18–29	89,595	37.5%
Age 30–54	113,487	47.5%
Age 55–64	35,838	15.0%
Underemployed		
Underemployed	67,779	100.0%
Male	36,330	53.6%
Female	31,449	46.4%
Age 18–29	29,009	42.8%
Age 30–54	32,466	47.9%
Age 55–64	6,303	9.3%

Sources: Census and Bureau of Labor Statistics (BLS) Population and Labor Force Estimates

* Underemployment is a subset and is included in the available workforce statistics

Average Age and Years on the Job

The average age and years on the job for the various occupational clusters indicate a mature, experienced, and diverse available workforce. The higher median age indicates that the older labor force is participating in work at a higher rate than younger workers. The **Non-worker Available** has a higher average and median age (50.4 and 55.0) due

to a high proportion of **homemaker** and **retired** non-workers not actively seeking but available for the right opportunity. The average age for the **total available workforce** is 44.8 while the median age is 47.0.

The three oldest occupation groups are: Production: Factory Assembly, Fabrication, etc.; Professional: Doctors, Lawyers, Engineers, etc.; and Maintenance, Installations, and Repairs, etc. The three youngest occupation groups are: Consumer Services Retail, Restaurant, etc.; Other Blue Collar: Laborers, Farm Hand, etc.; and Administrative Support: Shipping/Receiving, Secretaries, etc.

The top three occupation groups by most years on the job are: Professional: Doctors, Lawyers, Engineers, etc.; Managerial, Executive, etc.; and Other White Collar Workers. The top three occupation groups by least years on the job are: Delivery/Drivers/Courier; Protective: Police/Fire/, etc.; and Consumer Services Retail, Restaurant, Hotel, Food Services, etc.

Average Age by Occupational Clusters

Category	Avg. Age	Med. Age
Management	45.9	49.0
Production/Repair/Installation	47.4	50.0
Professional/Technical	44.5	46.0
Services	42.3	47.0
Non-Worker Available	50.4	55.0

Available Workforce Average Age and Years on Job

	Average Age	Years on Job
Administrative Support: Shipping/Receiving, Secretaries, Computer Operators, etc.	41.5	4.8
Business Office and Clerical Operations	45.4	6.6
Business Sales: Finance, Insurance, Real Estate, Wholesale, Industrial etc.	41.7	6.6
Professional: Doctors, Lawyers, Engineers, Accountants, Professors, Consultants, etc.	47.3	8.7
Computer Technology, Science, Math and Engineering (STEM)	44	6.6
Consumer Services Retail, Restaurant, Hotel, Food Services, etc.	39.1	4.1
Delivery/Drivers/Courier	42.5	3.3
Government Office and Clerical Operations	41.7	4.9
Health, Social, Community, Personal Care, and Recreation Services	44.2	6.7
Maintenance, Installations, and Repairs (Mechanic, Carpenter, Plumber, Electrician) etc.	47.2	7.2
Managerial, Executive, Business Owners, Farmers, Supervisory	45.9	8.0
Other Blue Collar: Laborers, Farm Hand, Janitor, Warehouse Workers, etc.	40.2	7.1
Other White Collar Workers	44.6	7.6
Production: Factory Assembly, Fabrication, Construction and Mining	47.5	7.1
Protective: Police/Fire/ Military/Regulators/investigators and Postal	45.8	3.6
Teachers, Instructors, Trainers, Writers, Researchers, etc.	43.6	5.8

Current and Previous/Other Work Experience

The following table shows the current work experience, second jobs, currently underutilized, and previously underutilized of the total **worker available workforce**. The table provides a perspective on the types of workers available for employment in the NMDP ALM. The first column in the table shows the number of workers available employed in the various occupational clusters.

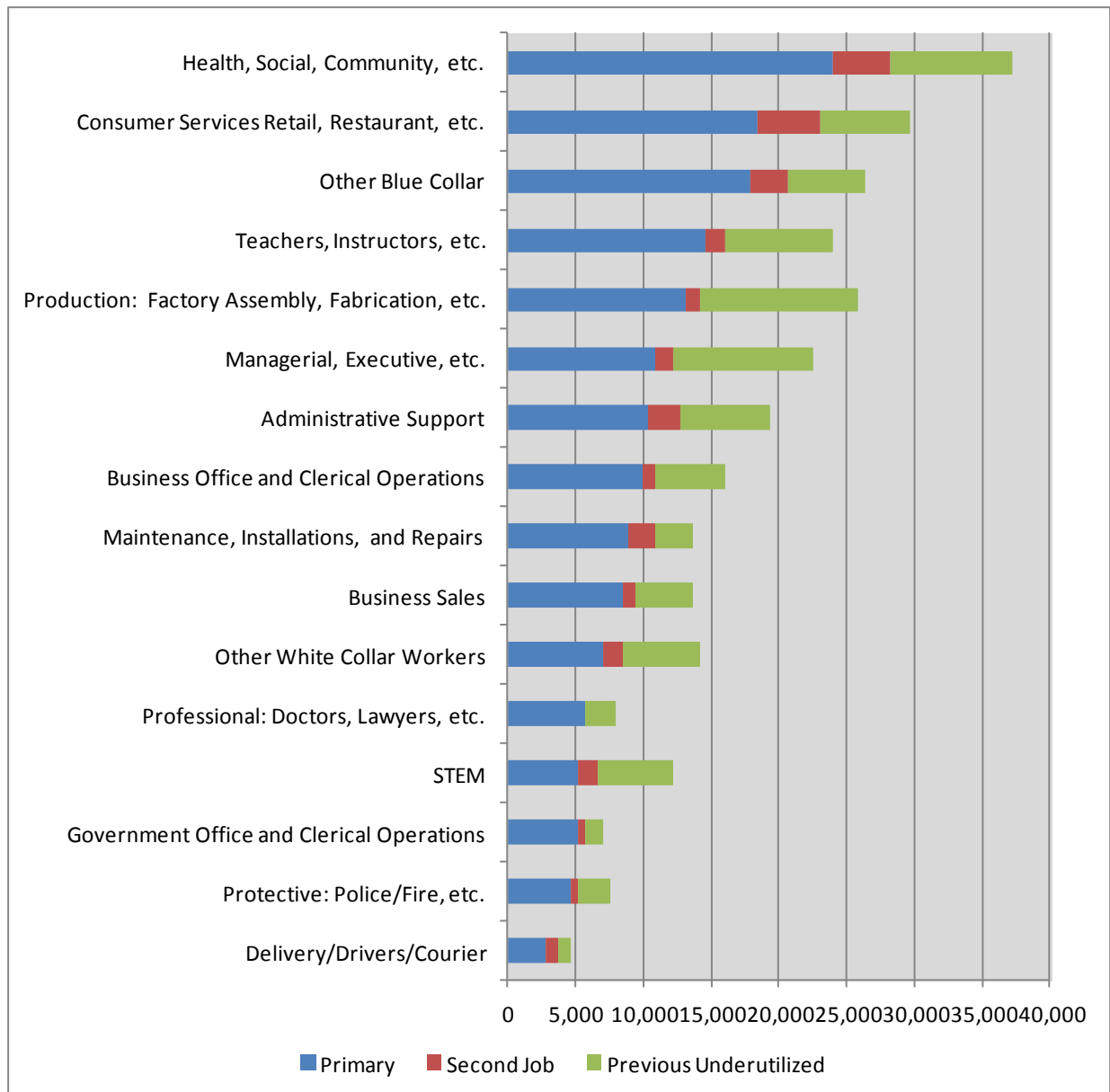
Respondents are indicating a high level of employment availability from the service sector in areas of health, social, and community care and in the retail, hospitality, and food service occupations. However, the survey shows a workforce with skills, education, and experience available across the entire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

Of those **workers available** and currently employed, 15.8 percent also have second jobs. Twenty-five percent of Consumer Services, Retail, Restaurant, etc. have a second job, along with 17.6 percent of Health, Social, and Community Care workers. A relatively high 27.3 percent of STEM occupations have second jobs with an even higher number (36.4%) identifying themselves as underutilized or underemployed. Over 50.0 percent of Consumer Services, Retail, Restaurant, etc. are underutilized with eight other occupation groups also identifying themselves as highly underutilized or **underemployed**. The second job, current underutilized, and previous underutilized are all subsets of the worker available.

Worker Available Work Experience

	Primary	Second	Current Underutilized	Previous Underutilized
Administrative Support: Shipping/Receiving, Secretaries, Computer Operators, etc.	10,361	2,355	6,123	6,594
Business Office and Clerical Operations	9,890	942	5,180	5,180
Business Sales: Finance, Insurance, Real Estate, Wholesale, Industrial etc.	8,477	942	5,180	4,238
Computer Technology, Science, Math and Engineering (STEM)	5,180	1,412	1,884	5,652
Consumer Services Retail, Restaurant, Hotel, Food Services, etc.	18,367	4,709	9,890	6,594
Delivery/Drivers/Courier	2,826	942	1,412	942
Government Office and Clerical Operations	5,180	471	2,826	1,412
Health, Social, Community, Personal Care, and Recreation Services	24,019	4,238	8,477	8,948
Maintenance, Installations, and Repairs (Mechanic, Carpenter, Plumber, Electrician) etc.	8,948	1,884	5,180	2,826
Managerial, Executive, Business Owners, Farmers, Supervisory	10,832	1,412	4,709	10,361
Other Blue Collar: Laborers, Farm Hand, Janitor, Warehouse Workers, etc.	17,896	2,826	10,361	5,652
Other White Collar Workers	7,064	1,412	4,238	5,652
Production: Factory Assembly, Fabrication, Construction and Mining	13,187	942	7,535	11,774
Professional: Doctors, Lawyers, Engineers, Accountants, Professors, Consultants, etc.	5,652	0	1,884	2,355
Protective: Police/Fire/ Military/Regulators/investigators and Postal	4,709	471	2,355	2,355
Teachers, Instructors, Trainers, Writers, Researchers, etc.	14,600	1,412	7,064	8,006
Worker Available	167,188	26,373	56,515	88,540
Non-worker Available	71,733	N/A	N/A	0

Worker Available Work Experience



The chart shows the same information as presented in the table on the previous page but in a graphical format and without the currently underutilized. The visual shows a good mix of current and related work experience and those who indicated availability and as currently employed. The Other Blue Collar and Production type of occupations show opportunities for the Goods Producing industries, such as manufacturing and maintenance and installation, with over 35,000 indentifying themselves as available.

Student Debt

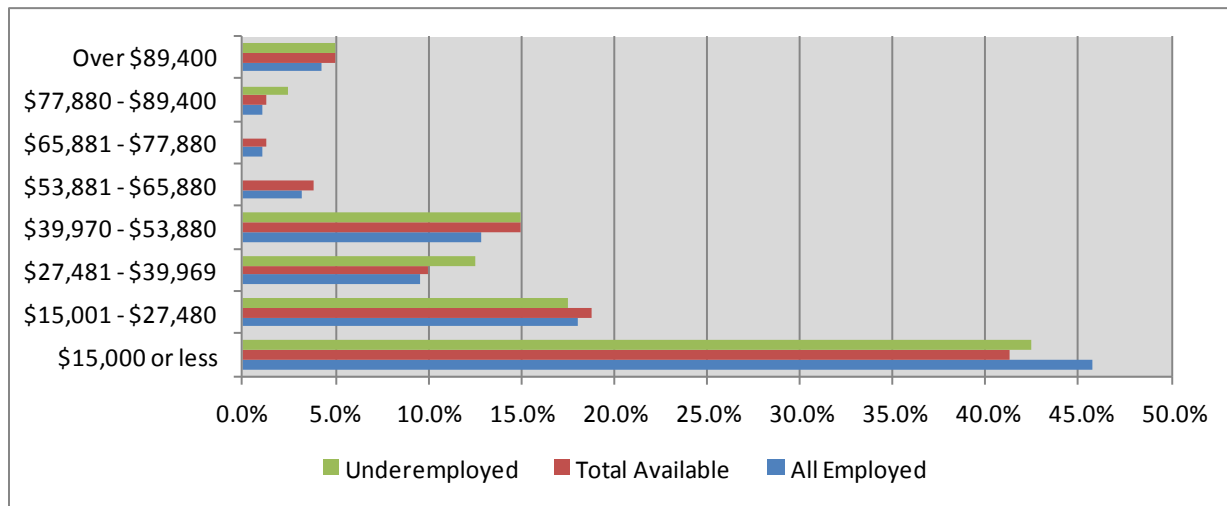
Student debt is a growing concern, and along with a necessary educated workforce is a challenge for our local and national economy. According to the Wall Street Journal 40 million people, roughly 70 percent of recent graduates, have an average debt load of \$33,000. It is for this reason that student debt is addressed in this study.

The data indicates that 38.5 percent of the 18–29 year olds have student debt. This compares to 24.9 percent for the 30–54 year olds and 7.6 percent for the 55–64 year olds. The debt amounts for the younger available workforce are skewed towards the lower end of the debt balance spectrum where the distribution of the debt appears to widen for the older age groups.

Student Debt by Age Group

	18 - 29	30 - 54	55 - 64
Have Debt	38.5%	24.9%	7.6%
\$15,000 or less	60.0%	35.2%	30.0%
\$15,001 - \$27,480	20.0%	16.9%	20.0%
\$27,481 - \$39,969	0.0%	11.3%	10.0%
\$39,970 - \$53,880	12.0%	16.9%	10.0%
\$53,881 - \$65,880	4.0%	4.2%	20.0%
\$65,881 - \$77,880	0.0%	1.4%	0.0%
\$77,880 - \$89,400	4.0%	0.0%	0.0%
Over \$89,400	0.0%	7.0%	10.0%
No Response	0.0%	7.0%	0.0%

Student Debt Current and Total Available Workforce



The chart represents the percentage of the various groups of underemployed, total available workforce, and all employed have in debt compared to each other. The all employment group appears well represented in all debt categories with over 40 percent having debt of \$15,000 or less.

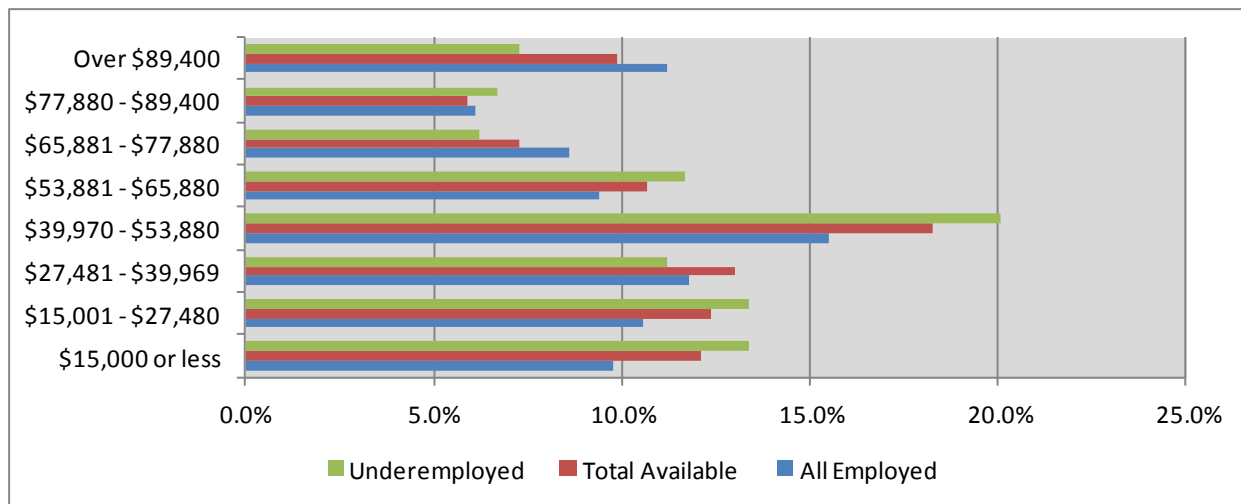
Household Income

The household income clearly shows the younger 18–29 age group with 30.8 percent having household income of \$15,000 or less compared to 30–54 age group's 15.4 percent and the 55–64 age group's 13.9 percent. For the 18–29 age group 6.2 percent have a household income over \$77,880 compared to 14.1 percent of the 30–54 age group and 17.4 percent for the 55–64 age group.

Household Income by Age Group

	18 - 29	30 - 54	55 - 64
\$15,000 or less	30.8%	15.4%	13.9%
\$15,001 - \$27,480	20.0%	14.7%	9.5%
\$27,481 - \$39,969	16.9%	10.9%	11.4%
\$39,970 - \$53,880	4.6%	17.9%	15.9%
\$53,881 - \$65,880	7.7%	10.2%	9.1%
\$65,881 - \$77,880	6.2%	8.1%	7.6%
\$77,880 - \$89,400	6.2%	5.3%	4.5%
Over \$89,400	0.0%	8.8%	12.9%
No Response	7.7%	8.8%	15.2%

Household Income Current and Total Available Workforce



The chart represents the percentage of the various groups of underemployed, total available workforce, and all employed have in household income compared to each other. The underemployed appear to be motivated about income with a larger percent responding in the lower income and a lower percent represented in the higher income.

Worker 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 **total 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 the **total available workforce**. The results of this workforce survey show that 73.7 percent of the respondents identified themselves as part of the **total available workforce** were **worker available** at the time they were contacted with the other 26.3 percent as **non-worker available**.

Worker Available Breakout

Category 18-64	Overall	Percent
Total Available	238,921	100.0%
<u>Worker Available Workforce</u>	167,188	70.0%
Underemployed	67,779	28.4%
Seeking Different Employment	41,232	17.3%
Willing To Change	58,177	24.3%

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 **worker available workforce** are three subsets: those who classify themselves as **underemployed**, those actively **seeking different employment**, and those **willing to change** with the right opportunity. Respondents of these three subsets are counted only once as part of the **worker available workforce**.

Worker Available Population



Underemployed

The subset of underemployment 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. In addition to the survey definition and self-selection of underemployed by the respondent, GSG has further selected only those who have had some post-high school education.

The 67,779 in this group are included in 167,188 members of the worker available workforce. By looking at the two tables one can see some similarities with seeking and willing to change subset and the underemployed.

Age and Gender

The mean or average age of this group is 43 years of age. The respondents are distributed among all age ranges: 18 to 29 (42.8%), 30 to 54 (47.9%), and 55 to 64 (9.3%). Males and females represent 53.1 percent and 46.4 percent respectfully.

Education and Training

Sixty-five percent of the **underemployed** respondents in the ALM have some college or associate degree and the other 35 percent have bachelor's or advanced degrees. This compares to 65.1 percent of the **total available workforce** with post-high school education.

Twenty percent (19.8%) of the **underemployed** respondents stated that experience, training, and educational opportunities would be important in accepting a new job.

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. Thirty-three percent of the **underemployed** are in the Goods Producing sector.

Underemployed Workforce Characteristics

Underemployed	67,779
Years on Job	6.5
Willing to Commute One Way	27.9
Current Average Wage	\$16.72
Desired Average Wage	\$20.30
Household Income	\$46,845
Average Age	42.6
Male/Female Ratio	53.1/46.4
Working a Second or Part Time Job	23.3%
Only Job Part Time or Temporary	10.0%
Employer Doesn't Provide Health Insurance	28.0%
Has No Health Insurance	23.3%
Has No Retirement Benefits	42.4%

Underemployed Education Attainment

Less than high school	0.0%
High school or equivalent	0.0%
Some college or associate's degree	65.0%
Bachelor's degree	22.5%
Advanced degree	12.5%
Underemployed	67,779

Underemployed Primary Industry Sector/Past Employment

Goods Producing	27.5%
Service Providing	50.8%
Government/Education	21.7%
Underemployed	67,779

Seeking Different Employment

The subset of **seeking different employment** is identified as those who are actively looking to change jobs but are still currently employed. The 41,232 in this group are already included in 167,188 and are not counted twice. By comparing the two different tables **willing to change** and **seeking different employment**, one can see some significant differences. The **seeking different employment** have less years on the job, lower current wages, lower household income, a lesser degree of second or part-time jobs, a higher percentage with no health insurance and lower levels of education.

Age and Gender

The mean or average age of this group is 43.4 years of age. The respondents are distributed among all age ranges: 18 to 29 (42.9%), 30 to 54 (44.4%), and 55 to 64 (12.7%). Males represent a lesser proportion (41.3/58.7) than females of those **seeking different employment**.

Education and Training

More than half (68.5%) of the subset have post high school education and 26.0 percent have four-year degrees or higher. The seeking **different employment** subset has a slightly higher education attainment level of 68.5 percent with some post-high school education compared to 65.1 percent of the **total available workforce** of 238,921.

Twenty-three percent (23.6%) of the **seeking different employment** respondents stated that experience, training, and educational opportunities would be an important consideration in accepting a new job.

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. Twenty-nine percent of the **seeking different employment** are in the Goods Producing sector.

Seeking Workforce Characteristics

Seeking Different Employment	41,232
Years on Job	7.1
Willing to Commute One Way	25.2
Current Average Wage	\$14.27
Desired Average Wage	\$17.88
Household Income	\$40,950
Average Age	43.4
Male/Female Ratio	41.3/58.7
Working a Second or Part Time Job	6.9%
Only Job Part Time or Temporary	16.4%
Employer Doesn't Provide Health Insurance	32.9%
No Health Insurance	19.2%
No Retirement Benefits	47.9%

Seeking Education Attainment

Less than high school	5.5%
High school or equivalent	26.0%
Some college or associate's degree	42.5%
Bachelor's degree	16.4%
Advanced degree	9.6%
Seeking Different Employment	41,232

Seeking Primary Industry Sector/Past Employment

Goods Producing	28.8%
Service Providing	52.1%
Government/Education	19.2%
Seeking Different Employment	41,232

Willing to Change

The **worker available workforce** in the Overall NMDP ALM is 167,188. Those willing to change number 58,177. See the following table for more characteristics of this group.

Age and Gender

The mean or average age of this group is 44 years. The respondents are distributed among all age ranges: 18 to 29 (26.6%), 30 to 54 (58.2%), and 55 to 64 (15.2%). Males and females represent a 57/43 proportion of those willing to accept different employment.

Education and Training

Almost three-quarters (73.8%) of the **willing to change** respondents in the ALM have some post high school education and 32.0 percent possess four-year degrees or higher. The **willing to change** subset has a slightly higher education attainment level of 73.8 percent with some post-high school education compared to 65.1 percent of the **total available workforce** of 238,921.

Eighteen percent (18.5%) of the **willing to change** respondents stated that experience, training, and educational opportunities would be an important consideration in accepting a new job.

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. Twenty-eight percent of the **willing to change** segment is in the Goods Producing sector.

Willing to Change Workforce Characteristics

	Overall
Willing to Change	58,177
Years on Job	9.8
Willing to Commute One Way	25.5
Current Average Wage	\$22.83
Desired Average Wage	\$22.34
Household Income	\$54,044
Average Age	45.3
Male/Female Ratio	57/43
Working a Second or Part Time Job	13.6%
Only Job Part Time or Temporary	7.8%
No Employer-Provided Health Insurance	22.5%
No Health Insurance	10.7%
No Retirement Benefits	36.3%

Willing to Change Education Attainment

	Overall
Less than high school	0.0%
High school or equivalent	26.2%
Some college or associate's degree	41.8%
Bachelor's degree	22.3%
Advanced degree	9.7%
Willing to Change	58,177

Willing to Change Primary Industry Sector/Past Employment

Goods Producing	28.2%
Service Providing	52.4%
Government/Education	19.4%
Willing to Change	58,177

Non-Worker 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-worker as part of its Area Labor Market (ALM) studies

which includes three subsets: **unemployed**, **homemaker**, and **retired** in the non-worker segment.

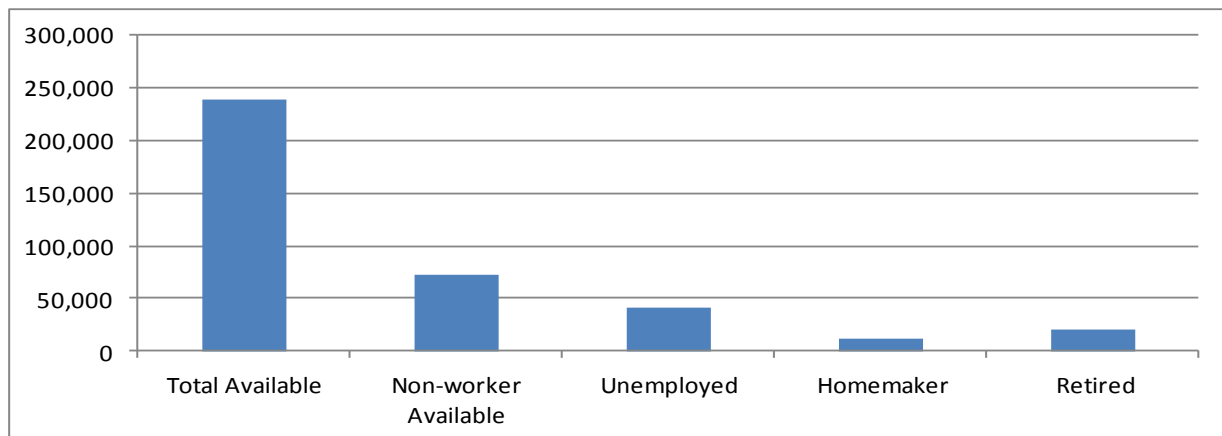
Including these subsets in the analysis provides a more accurate assessment of the potential workforce in the ALM. Of the respondents interviewed, 26.3 percent stated they were non-working. By questioning these respondents about seeking employment or their willingness to accept an employment offer, the survey identified 71,733 in the **unemployed**, **homemaker**, and **retired** 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 includes wages, benefits, work culture, transportation, childcare, scheduling, etc. The following sections provide a profile of the non-working **unemployed**, **homemakers**, and **retired** respondents.

Non-worker Breakout

Category 18-64	Overall	Percent
Total Available*	238,921	100.0%
<i>Non-worker Available (Willing To Work)</i>	71,733	30.0%
Unemployed	40,668	17.0%
Homemaker	11,297	4.7%
Retired	19,769	8.3%

Non-worker Available Population



Unemployed

Of those who responded who are **unemployed**, 43.4 percent are seeking or willing to accept employment with the right opportunity. It is estimated that 23,018 are willing to return to work if presented with the right opportunity. The 40,668 represents both those seeking employment (17,650) and those willing with the right opportunity (23,018). The following table provides the general characteristics of this subdivision.

Age and Gender

The average age of this group is 43.6 years of age. The respondents are distributed among all age ranges: 18 to 29 (43.9%), 30 to 54 (40.2%), and 55 to 64 (15.9%). Men make up 47.8 percent and females 52.2 percent seeking or willing to accept employment.

Education and Training

Fifty-nine percent of the **unemployed** respondents in the ALM have some post-high school education. In comparing the **unemployed** subset to other subsets shows the **unemployed** tend to be the least educated with only 48.6 percent having some college and compares to the overall population at 65.1 percent.

Work Experience and Environment

To gain perspective on the types of skills possessed by the **total 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 7.3 percent of the **total available workforce**.

Reason Unemployed

Of those who identified themselves as **unemployed** (40,668) 27.3 percent stated that it was due to a major layoff or plant closing and another 33.3 percent claim disability. Of this group less than half are seeking employment with the other half stating they would be available for the right opportunity. Nine percent claim they were fired or released from their jobs. In reality many of those unemployed indicating availability would be less acceptable on the demand side of today's labor market than the other categories of the available workforce.

Reason Can't Find Job

Of those responding about not finding a job, 47.0 percent state job availability while only 3.0 percent state that it is lacking necessary skills. Transportation and child care were stated by 10.7 percent and may be limiting factors for some potential workers.

Unemployed Workforce Characteristics

Unemployed	40,668
Seeking Employment	17,650
Commute One Way	23.8
Desired Average Wage	\$13.47
Average Age	43.6
Male/Female Ratio	47.8/52.2
Household Income	\$25,867

Unemployed Education Attainment

Less than high school	9.7%
High school or equivalent	41.7%
Some college or associate's degree	38.9%
Bachelor's degree	6.9%
Advanced degree	2.8%
Unemployed	40,668

Reason Unemployed

Major Layoff or Plant Closing	27.3%
Fired/Released	9.1%
Never Employed	0.0%
Disabled	33.3%
Pension Income	1.5%
Other Income	7.6%
No Response	21.2%
Unemployed	40,668

Reason Can't Find Job

Job Availability	47.0%
Lacking Necessary Skills	3.0%
Compatibility/Personality	6.1%
Lack High School Diploma	3.0%
Transportation	6.1%
Child Care	4.6%
Not Interested/Other	19.7%
No Response	10.6%
Unemployed	40,668

Homemakers

Of those who responded as **homemakers**, it is estimated that 11,297 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 provides the general characteristics of this subset.

Age and Gender

The mean or average age of this group is 45 years of age compared with 44 years of age in the overall working group. The respondents are distributed among all age ranges: 18 to 29 (29.3%), 30 to 54 (59.2%), and 55 to 64 (11.5%), . Men make up 15 percent and females 85 percent seeking or willing to accept employment.

Education and Training

Forty percent of the **homemaker** respondents in the ALM have some post-high school education with 10.0 percent earning four-year degrees or higher. In comparing the **homemaker** subset to the other subsets shows **homemakers** tend to be less educated with 40.0 percent with some college compared to the **total available workforce** at 65.1 percent.

Experience, training, and educational opportunities would be an important consideration in accepting a new job to 26.3 percent of the **homemaker** respondents.

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 5.5 percent with experience in the Goods Producing sector.

Homemaker Workforce Characteristics

Homemaker Workforce Characteristics	
Homemaker	11,297
Seeking or Willing	4,519
Commute One Way	20.6
Desired Average Wage	\$12.69
Average Age	44.9
Male/Female Ratio	14.5/85.5
Household Income	\$35,092

Homemaker Education Attainment

Homemaker Education Attainment	
Less than high school	20.0%
High school or equivalent	40.0%
Some college or associate's degree	30.0%
Bachelor's degree	10.0%
Advanced degree	0.0%
Homemaker	11,297

Retired

Of those who responded as being **retired**, it is estimated that 19,769 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 NMDP ALM into age, gender, and education areas.

Age and Gender

The mean or average age of this group is 58 years of age. The respondents are distributed in the 45 to 64 age range. Men make up 54 percent and female 46 percent seeking or willing to accept employment.

Education and Training

Seventy-one percent of the **retired** respondents in the ALM have some post-high school education with 40.0 percent possessing four-year degrees or higher. In comparing retirees to the other subsets shows the retirees have a higher level of education with 71.4 percent having some college compared to the **total available workforce** at 65.1 percent. This group represents a significant pool of experienced and educated workers but also higher opportunity costs to get them back in the labor market.

Only 18.5 percent of the **retired** respondents stated that experience, training, and educational opportunities would be important in accepting a new job.

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 **retired** subset consists of 12.5 percent with experience in the Goods Producing sector.

Retired Workforce Characteristics

Retired Workforce Characteristics	
Retired	19,769
Seeking or Willing	10,732
Commute One Way	22.4
Desired Average Wage	\$16.64
Average Age	57.7
Male/Female Ratio	54/46
Household Income	\$48,678

Retired Education Attainment

Retired Education Attainment	
Less than high school	2.9%
High school or equivalent	25.7%
Some college or associate's degree	31.4%
Bachelor's degree	17.1%
Advanced degree	22.9%
Retired	19,769

Desired Wages and Benefits

Wages and benefits rank high among workers and non-workers in the **total 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.

Desired Benefits

Salary and wages appear to be a top motivator for changing jobs, with health care, retirement, flexible hours, and experiences, training, and education following. Salary and wages rated higher for the **worker available** than the **non-worker available** while health and flexible hours rated higher than retirement benefits for benefit areas.

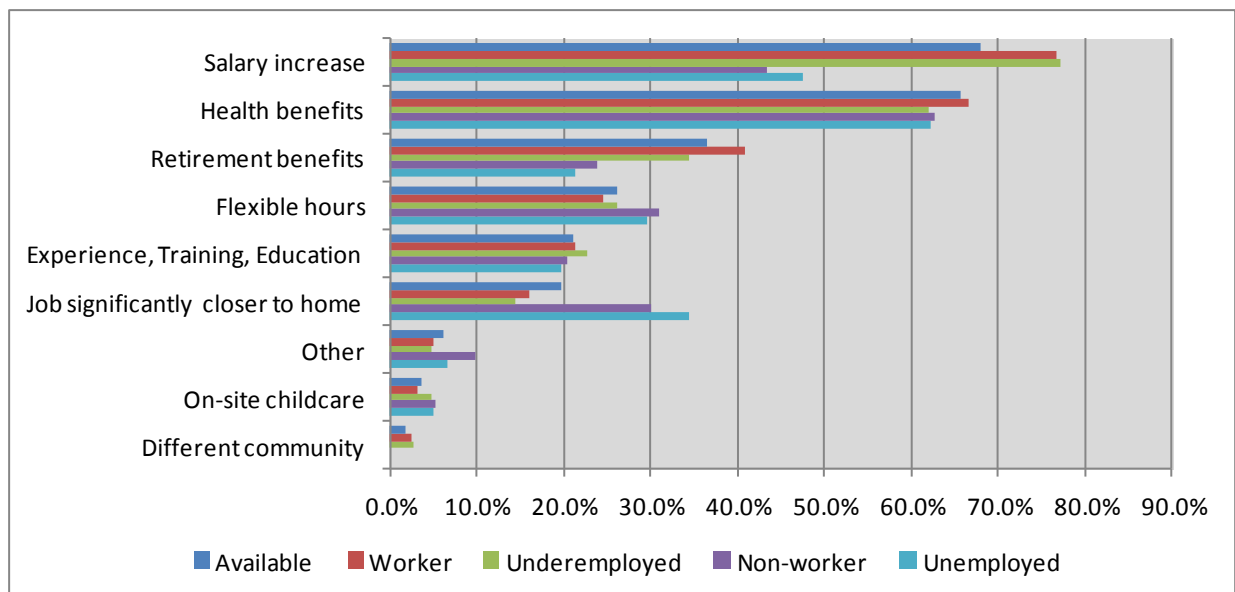
Desired Benefits by Group

Category	Available	Worker	Under-employed	Non-worker	Un-employed
Health benefits	65.6%	66.6%	62.1%	62.8%	62.3%
Experience, Training, Education	21.1%	21.4%	22.8%	20.4%	19.7%
Salary increase	68.1%	76.8%	77.2%	43.4%	47.5%
Retirement benefits	36.5%	40.9%	34.5%	23.9%	21.3%
On-site childcare	3.7%	3.1%	4.8%	5.3%	4.9%
Flexible hours	26.2%	24.5%	26.2%	31.0%	29.5%
Different community	1.8%	2.5%	2.8%	0.0%	0.0%
Job significantly closer to home	19.7%	16.1%	14.5%	30.1%	34.4%
Other	6.2%	5.0%	4.8%	9.7%	6.6%

Multi-select options, percents will not total to 100%

The **non-worker available workforce** has a higher preference for flexible hours and jobs closer to home than the **worker available** group. The **underemployed**, which is a subset of the **worker available workforce**, has a higher percentage of interest to change jobs than the worker segment. The **underemployed** also normally have lower age and higher education attainment levels.

Available Workforce Desired Benefits



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 of the **total available workforce** would be interested in employment with a wage of up to \$9.99 per hour. It is estimated that 177,777 people or 65.3 percent of the **total available workforce** would be interested in a new or different employment with a wage of up to \$20.00. Seven percent would require \$31.00 or more for a new job opportunity. Those that currently hold jobs would require a higher desired wage than the non-worker in the available workforce.

Available Workforce Desired Wage Rate Ranges

\$9.99 or Less	\$10.00 - \$10.99	\$11.00 - \$11.99	\$12.00 - \$12.99
7.1%	12.1%	3.0%	8.1%
\$13.00 - \$13.99	\$14.00 - \$15.99	\$16.00 - \$17.99	\$18.00 - \$19.99
3.7%	20.2%	5.4%	5.7%
\$20.00 - \$21.99	\$22.00 - \$24.99	\$25.00 - \$27.99	\$28.00 - \$30.99
12.1%	2.2%	7.1%	6.2%
\$31.00 - \$33.99	\$34.00 - \$36.99	\$37.00 - \$39.99	\$40.00 or More
0.2%	1.5%	0.7%	4.7%

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

Desired Wage Rate by Available Workforce Group

Category	Overall		Worker		Non-Worker		Underemployed	
	Available Workforce	Percent	Available Workforce	Percent	Available Workforce	Percent	Available Workforce	Percent
\$9.99 or Less	16,963	7.1%	5,684	3.4%	12,625	17.6%	4,270	6.3%
\$10.00 - \$14.99	72,393	30.3%	44,305	26.5%	29,195	40.7%	22,367	33.0%
\$15.00 - \$19.99	66,420	27.8%	48,317	28.9%	17,933	25.0%	20,808	30.7%
\$20.00 - \$24.99	34,166	14.3%	26,917	16.1%	6,671	9.3%	9,625	14.2%
\$25.00 - \$29.99	17,680	7.4%	14,545	8.7%	2,654	3.7%	3,863	5.7%
\$30.00 - \$34.99	16,008	6.7%	14,545	8.7%	646	0.9%	3,457	5.1%
Over \$35.00	15,291	6.4%	12,873	7.7%	2,009	2.8%	3,457	5.1%
Total:	238,921	100.0%	167,188	100.0%	71,733	100.0%	67,779	100.0%

Desired Wage Rate By Industry and Occupation

The Government/Education industry sector has the highest desired wage of \$20.63 with the Service Providing industry sector having the lowest at \$19.56. The management occupation group has the highest desired wage at \$37.53 and those currently non-working have the lowest at \$14.22.

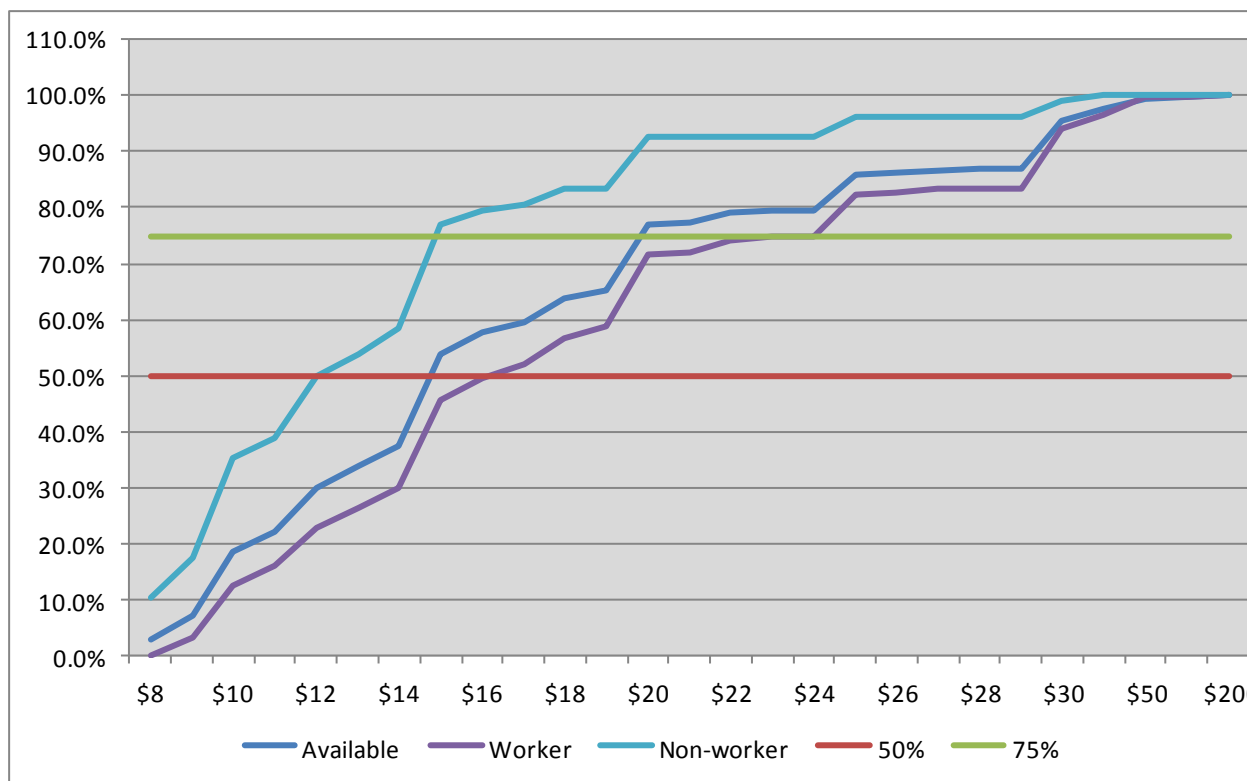
Desired Wage Rate by Industry

Category	
Government / Education	\$20.63
Goods Producing	\$20.62
Service Providing	\$19.56

Desired Wage Rate by Occupation

Category	
Management	\$37.53
Production/Repair/Installation	\$20.71
Professional/Technical	\$21.75
Services	\$17.53
Non-Working Available	\$14.22

Desired Wage Rate by Percent of Available Workforce



The higher the level of desired wage, the higher the percentage of the population that would take that wage. About 50 percent of the population would be satisfied with \$15.00 an hour or less and about 75% of the population would be satisfied with \$20.00 an hour or less.

Occupation Actual and Desired Wages

The following table provides a detailed analysis of the **total available workforce** by occupation, average actual wage, and average desired wage. Comparing the actual average wage with the desired wage shows the expectations of the **worker available workforce** in accepting a new job. The Production/Repair/Installation occupation clusters indicate almost no difference between the actual and desired wages. The Management and Service clusters have a higher desired wage, 11.1 and 8.6 percent higher respectfully.

The Managerial, Executive, business Owners, etc. occupation group has the highest actual average wage of \$33.79 with an average desired wage of \$37.53. This may indicate a low demand and high supply for those occupations.

Occupation Actual and Desired Wages

	Available Workforce	Average Actual Wage	Average Desired Wage
Management	10,832	\$33.79	\$37.53
Managerial, Executive, Business Owners, Farmers, Supervisory	10,832	\$33.79	\$37.53
Production/Repair/Installation	22,135	\$21.16	\$20.71
Maintenance, Installations, and Repairs, etc.	8,948	\$19.77	\$21.50
Production: Factory Assembly, Fabrication, Construction, and Mining	13,187	\$22.11	\$20.17
Professional/Technical	38,618	\$23.93	\$21.75
Business Sales: Finance, Insurance, Real Estate, Wholesale, Industrial, etc.	8,477	\$28.27	\$20.06
Professionals: Doctors, Lawyers, Engineers, Accountants, Professors, etc.	5,652	\$30.91	\$28.00
Computer Technology, Science, Math, and Engineering	5,180	\$33.37	\$28.51
Protective: Police/Fire/Military/Regulators/Investigators and Postal	4,709	\$23.64	\$24.00
Teachers, Instructors, Trainers, Writers, Researchers, etc.	14,600	\$15.44	\$19.68
Services	95,603	\$16.14	\$17.53
Administrative Support: Shipping/Receiving, Secretaries, Computer Operators, etc.	10,361	\$17.88	\$17.13
Business Office and Clerical Operations	9,890	\$12.93	\$16.44
Consumer Services, Retail, Restaurant, Hotel, Food Services, etc.	18,367	\$12.47	\$15.04
Delivery/Drivers/Couriers	2,826	\$16.05	\$19.38
Government Office and Clerical Operations	5,180	\$15.07	\$21.30
Health, Social, Community, Personal Care, and Recreation Services	24,019	\$18.03	\$18.60
Other Blue Collar: Laborers, Farm Hand, Janitor, Warehouse Workers, etc.	17,896	\$17.88	\$17.88
Other White Collar Workers	7,064	\$17.55	\$18.11
Non-Worker Available	71,733	N/A	\$14.22
Homemaker	11,297	N/A	\$12.69
Retired	19,769	N/A	\$16.64
Unemployed	40,668	N/A	\$13.47

Adjustments have been made to reflect anomalies in the survey data

In the five occupation clusters with lower desired wages than actual wages, it could be assumed some opportunities exist for a competitive, experiences, and educated workforce. The lower expectations for desired wages of \$14.22 is particularly note worthy.

Commuting Patterns and Preferences

The preferred commute of the **worker available workforce** in the 27-county Area Labor Market ALM is 27.2 minutes/miles one way. The overall commute preference of the **total available workforce** is 25.9 minutes/miles one way. The **total available workforce** indicates it is open to commuting for the right employment opportunity. The table shows 230,067 people or 84.5 percent of the **total available workforce** would commute more than 10 minutes/miles, one way, for work. It also shows that 95,861 people or 35.2 percent of the **total available workforce** are willing to travel more than 30 minutes/miles and 26,841 people 9.9 percent will commute more than 50 minutes/miles.

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 25 to 29 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 less willing to travel further and are less open in their employment options than either the **homemakers** or the **retired**. 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 the ALM is willing to travel is 20.6 minutes/miles one way. In general, **retired** people are not as willing to commute long distances to work; however, those in the 27-county ALM are willing to travel 22.4 minutes/miles one way for employment opportunities.

There are 9.1 percent, or 18,247, of the **worker available workforce** that commute to work outside the 27-county NMDP ALM. Of this number, 56.8 percent identify themselves as **underemployed** and the remaining are **seeking different employment** or are **willing to change** for the right opportunity.

Preferred Distance/Travel Time

Less than 10 miles	42,179
10 - 30 miles	134,206
31 - 50 miles	69,020
51+ miles	26,841
Total Available Workforce	238,921

Available Workforce Group Preferred Distance/Travel Time

Total Available Workforce	25.9
Worker Available Workforce	27.2
Underemployed	29.0
Seeking Different Employment	25.2
Willing To Change	25.5
Non-Worker Available Workforce	20.8
Unemployed	19.8
Homemaker	20.6
Retired	22.4

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.

There are three broad categories of interest when working: people, data, and things. Most people have preference for one, but most are adaptable to all three. A primary interest in one of the three may be an indicator of success in certain occupations. A stronger interest in people may lead to occupations in management and services. An interest in working with things may point to occupations in Production. Professional/Technical may require a stronger interest in data and analytical skills. The survey results for NMDP showed interest in People with 43.6 percent, Data with 7.1 percent, and Things with 10.0 percent. Thirty-nine percent identified an interest in all three.

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.

Commuting by Occupation Group

	Minutes/ Miles
Management	24.1
Production/Repair/Installation	31.5
Professional/Technical	30.5
Services	25.1
Non-Working Available Workforce	22.8
Overall Average	25.9

Commuting by Industry Type

	Minutes/ Miles
Goods Producing	28.3
Government/Education	26.5
Service Providing	26.5

Willing To Change Primary Occupation

	Available Workforce	Willing To Change	Percent
Worker Available	167,188	146,958	87.9%
Underemployed	67,779	60,323	89.0%
Seeking Different Employment	41,232	38,428	93.2%
Willing To Change	58,177	47,938	82.4%
Non-Worker Available	71,733	60,327	84.1%
Unemployed	40,668	35,747	87.9%
Homemaker	11,297	10,698	94.7%
Retired	19,769	13,917	70.4%

Willing To Change Primary Industry Group

	Available Workforce	Willing To Change	Percent
Worker Available	167,188	147,293	88.1%
Underemployed	67,779	61,747	91.1%
Seeking Different Employment	41,232	37,232	90.3%
Willing To Change	58,177	47,356	81.4%
Non-Worker Available	71,733	61,332	85.5%
Unemployed	40,668	35,829	88.1%
Homemaker	11,297	10,111	89.5%
Retired	19,769	15,380	77.8%

Conclusion

This study assesses the supply side of labor and provides information for the NMDP Area Labor Market about commuting patterns, current and desired wages, worker occupation and industry, experience, and education. The **total available workforce** is determined from the workers and non-workers 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 skills, quality, and availability of the laborforce.

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 and presents opportunities for expansion and new investments. 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 a goal of a just-in-time skill and talent pool to meet the demand.

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.

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

A primary goal of any Area Labor Market (ALM) or labor shed analysis is to estimate the potential availability of workers and determine how well the surrounding geographical areas are able to provide a stable supply of workers to the central focused core of the ALM or labor shed.

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 of highly skilled and experienced labor is among the top three important location factors for businesses considering expansions or relocations (Area Development Annual Surveys).

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 individual members of the ALM pool who have a propensity to consider a job opportunity given their employment expectations. Employers' evaluating the labor component are also more likely interested in the population age segment 18-64 than in the CLF 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 labor* 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.

Published government statistics report wages and employment for the entire labor of an area, even though most of that labor 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 labor under the right conditions or opportunities including homemakers, and retirees.

The labor analysis will start with a focus or identification on a central zip code, community, county, or multi-county area to determine the boundaries for the area to be assessed. It can also decide to quantify those outside the central Core *willing to change jobs* and to commute and work in the central core area.

A random household telephone survey and targeted social media surveys have been ways for collecting data within the Area Labor Market. The survey is designed by Growth Services and

conducted by call center or social media research firms. The overall goal of the process is to collect a sufficient number of valid phone surveys completed by respondents 18 to 64 years of age. Validity of a sufficient number of survey results to a confidence of ± 5 percent is necessary with query or drill down validity of ± 10 -15 percent. To ensure that an even distribution of respondents is achieved, a proportional number of completions are conducted by county population, age segments, and gender. It is important to note that the projected results are based on relatively small sample size

The survey is designed and developed by The Growth Services Group (GSG) and approved by the client, employers, or Economic Development organization.

Survey interviewers pose questions to determine the respondents' gender, age, education level, place of residence, and current employment status. Employed respondents also identifies the location of their employer (not name), 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 are then asked how likely they are 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* is determined 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 are 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 labor 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 key interest areas, various internal geographic areas or labor sheds, and the entire surveyed ALM. Documenting and analyzing the ALM survey results by area and characteristics, provides new insight into the area's *available labor* 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.

Our propriety data applications allow for large multi-county partnerships for cost reductions. Our largest single Labor Availability study consisted of five partners and 27 counties, with each partner receiving its own labor shed breakout report from the same database, making the project more cost effective for all partners. All survey data is retained and available for further analysis on specific areas of interest (pricing may vary). The individual partner report results are proprietary and for your use only and are not shared with other partners. Only the database is common and by a programming application, separate labor shed reports can be developed. The survey questionnaire has to be uniform across the entire project area.