GSG

Labor Supply Certification

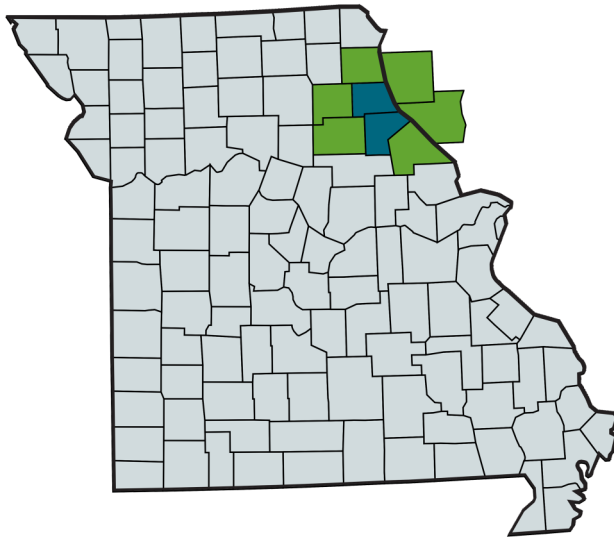## Hannibal/Marion and Ralls County, Missouri Laborshed

Underemployment   Available Skills   Desired Wages

Hannibal/Marion and Ralls County Labor Supply Certification

Partners in Economic Development

Hannibal Counties:

Adams, IL; Lewis; Marion; Monroe; Pike, IL; Pike; Ralls; Shelby

NORTHEAST MISSOURI *Economic Development Council*

NMDP
Northeast Missouri Development Partnership

For Opportunity and Growth

January 2019

GSG GROWTH SERVICES GROUP

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Executive Summary

Introduction

Hannibal/Marion and Ralls County (Hannibal) commissioned a Labor Supply Study to measure the amount and quality of potential employees in an eight county area labor market (ALM). The eight counties are: Adams, IL; Lewis; Marion; Monroe; Pike, IL; Pike; Ralls; and Shelby.

The purpose of this report is to assess the available workforce for Hannibal which in aggregate includes eight 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 Hannibal 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 and they possess the skills, education, and experience to qualify them to do so. Of the 82,082 persons in the total available workforce, 21,049 are considered underemployed (see more on page 11).

Total Available Workforce 82,082

Underemployed 21,049

With the right employment opportunities, Hannibal appears positioned to retain and attract the talent necessary for growth of new and existing businesses representing regional, national, and international markets. Hannibal has several advantages. The location provides advantages with rural amenities with easy access to both two and four-year education institutions near the ALM. Hannibal 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 50 percent (82,082 persons) of the Census Population Estimate in the Overall ALM is considered to be in the Total Available Workforce.

- It is estimated 15,048 non-worker and 67,034 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 718 homemakers, 3,202 retirees, and 11,127 unemployed.

- Approximately 26 percent of the total available workforce are underemployed (21,049).

- 39 percent of the total available workforce would be interested in employment with a wage up to $15.99 per hour. The average desired wage rate per hour for the occupational clusters shows that the professional/technical group is seeking $31.93; production/repair/installation, $20.96; service sector, $21.22; and the non-worker available group, $14.87.

- The education level of the total available workforce includes 81 percent with at least some college education and 97 percent with at least a high school diploma.

- The total available workforce is willing to commute an average of 26 minutes/miles one way. Of the total available workforce, 82 percent (67,492) would travel more than 10 minutes/miles one way for work while 36 percent (29,755) would commute more than 30 minutes/miles and 6 percent (4,763) would travel more than 50 minutes/miles.

- The overall average age of the total available workforce is 42. The average age of the worker available workforce by occupational cluster is 49 for management, 42 for production/repair/ installation, 41 for professional/technical, and 41 for service sector.

- The top motivators for changing jobs among those open for the right opportunities are 76 percent Health Care, 71 percent Salary, and 46 percent Flexible Hours.

- A majority, 86 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 7.8 years which reflects both a stable and mature workforce.

- 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 Hannibal/Marion and Ralls County (Hannibal) 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 Hannibal ALM; defined for the purpose of this study as the area or region from which the labor market draws its commuting workers. The Hannibal ALM consists of eight counties which are part of the larger Northeast Missouri Development Partnership (NMDP) region with a common methodology and database. This report also includes workers who are commuting out of the designated ALM to work but would be willing to work closer to home with the right employment opportunities. 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 marketing and social media campaign of 989 adults living in the NMDP ALM. The NMDP along with Hannibal contracted with Growth Services Group (GSG) to design and administer the Labor Supply Study and Notionfront of Moberly, MO to provide the social media respondents. In 989 of these households an adult who is working or non-working between the ages of 18 and 64 participated in the survey. When all 989 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. Very granular data points such as individual Household Income ranges by single Age Groups 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*	**82,082**	**100.0%**
Worker Available (Willing To Change)	**67,034**	**81.7%**
Underemployed	21,049	25.6%
Seeking Different Employment	14,851	18.1%
Willing To Change	31,134	37.9%
Non-worker Available (Willing To Work)	**15,048**	**18.3%**
Unemployed	11,127	13.6%
Homemaker	718	0.9%
Retired	3,202	3.9%

*While all those in the worker available workforce are willing to change with the right opportunity, 14,851 are seeking different employment and 21,049 are identified as underemployed and willing to change. The 31,134 Willing to Change are willing to change only for the right opportunity.

In the Non-worker 15,048, all are willing to work with the right opportunity. The unemployed (not currently working) includes both unemployed as defined by BLS (those who are seeking employment) as well as those that are not 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 ALM. The total available workforce represents 82,082 people which consists of 67,034 working and 15,048 non-working. This demonstrates the workforce of the region is sufficient in scope and diversity to support most employers considering expansion or location in the 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 in the ALM. Each county is grouped into one of three categories specified in the legend, each group making up approximately one third of the ALM counties.

The summary table for the ALM shows a total available workforce of 82,082, 49.6 percent of the estimated census population and 84.1 percent of the Estimated Census 18-64 Population. The table further presents the subsets of the total available workforce and underemployed by gender and age groupings. Men make up 51.0 percent and women 49.0 percent of the total available workforce. Those in the age 30-54 group consider themselves significantly more underutilized or underemployed at 50.8 percent than those in the age 55-64 at 21.4 percent.

Available Workforce Work Status

Category	Population	Percent
Total Available Workforce	**82,082**	**100.0%**
Worker Available	**67,034**	**81.7%**
Working Student	4,218	5.1%
Working (withholdings)	55,629	67.8%
Self-employed (no withholdings)	7,187	8.8%
Non-Worker Available	**15,048**	**18.3%**
Unemployed	10,640	13.0%
Homemaker	718	0.9%
Retired	3,202	3.9%
Non-working Student	487	0.6%

Sources of Available Workforce in Hannibal by County
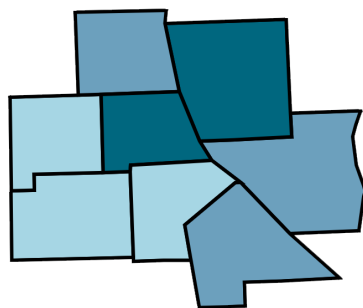
Category	Color
Less than 6.0%	
6.0% to 16.5%	
Greater than 16.5%	

Summary Workforce Results

Characteristics	Overall	Percent
Population and Civilian Labor Force		
Census Population	165,497	100.0%
Census 18-64 Population	97,550	100.0%
Census 18-64 Male Population	49,721	51.0%
Census 18-64 Female Population	47,829	49.0%
Available Workforce		
Total Available Workforce	82,082	100.0%
Male	40,994	49.9%
Female	41,088	50.1%
Age 18-29	18,101	22.1%
Age 30-54	46,333	56.4%
Age 55-64	17,648	21.5%
Underemployed		
Underemployed	21,049	100.0%
Male	8,148	38.7%
Female	12,901	61.3%
Age 18-29	5,862	27.9%
Age 30-54	10,685	50.8%
Age 55-64	4,503	21.4%

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. A 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 high average and median age (45.1 and 45.0) due primarily to retired non-workers not actively seeking but available for the right opportunity. The average age for the total available workforce is 42.2 while the median age is 44.0.

Average Age by Occupational Clusters

Category	Avg. Age	Med. Age
Management	49.2	48
Production/Repair/Installation	41.6	45
Professional/Technical	40.7	40.5
Services	41.0	43
Non-Worker Available	45.1	45

The three oldest occupation groups are: Delivery/Drivers/Courier; Other White Collar Workers; and Managerial, Executive, Business Owners, Farmers, Supervisory. The three youngest occupation groups are: Consumer Services Retail, Restaurant, Hotel, Food Services, etc.; Maintenance, Installations, and Repairs (Mechanic, Carpenter, Plumber, Electrician) etc.; and Business Sales: Finance, Insurance, Real Estate, Wholesale, Industrial etc..

The top three occupation groups by most years on the job are: Protective: Police/Fire/ Military/ Regulators/investigators and Postal; Other White Collar Workers; and Professional: Doctors, Lawyers, Engineers, Accountants, Professors, Consultants, etc.. The top three occupation groups by least years on the job are: Consumer Services Retail, Restaurant, Hotel, Food Services, etc.; Business Sales: Finance, Insurance, Real Estate, Wholesale, Industrial etc.; and Maintenance, Installations, and Repairs (Mechanic, Carpenter, Plumber, Electrician) etc..

Available Workforce Average Age and Years on Job

	Average Age	Years on Job
Administrative Support: Shipping/Receiving, Secretaries, Computer Operators, etc.	40.1	7.9
Business Office and Clerical Operations	39.3	7.1
Business Sales: Finance, Insurance, Real Estate, Wholesale, Industrial etc.	36.8	5.3
Computer Technology, Science, Math and Engineering	37.1	7.5
Consumer Services Retail, Restaurant, Hotel, Food Services, etc.	30.1	3.2
Delivery/Drivers/Courier	54.6	8.2
Government Office and Clerical Operations	48.1	9.6
Health, Social, Community, Personal Care, and Recreation Services	41.5	7.8
Maintenance, Installations, and Repairs (Mechanic, Carpenter, Plumber, Electrician) etc.	36.3	6.5
Managerial, Executive, Business Owners, Farmers, Supervisory	49.2	9.1
Other Blue Collar: Laborers, Farm Hand, Janitor, Warehouse Workers, etc.	37.0	6.9
Other White Collar Workers	52.3	10.1
Production: Factory Assembly, Fabrication, Construction and Mining	48.1	9.5
Professional: Doctors, Lawyers, Engineers, Accountants, Professors, Consultants, etc.	48.1	10.0
Protective: Police/Fire/ Military/Regulators/investigators and Postal	44.8	12.2
Teachers, Instructors, Trainers, Writers, Researchers, etc.	37.7	8.5

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 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 areas of Health, Social, Community, Personal Care, and Recreation Services; and Consumer Services Retail, Restaurant, Hotel, Food Services, etc.. 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, 27.5 percent also have second jobs. 55.2 percent of Business Sales: Finance, Insurance, Real Estate, Wholesale, Industrial etc. reported having a second job, along with 54.4 percent of Delivery/Drivers/Courier. Over 50 percent of workers in both Government Office and Clerical Operations and Consumer Services Retail, Restaurant, Hotel, Food Services, etc. are underutilized with 4 other occupation groups identifying themselves as highly underutilized or underemployed (>30%). The second job, current underutilized, and previous underutilized are all subsets of the worker available.

Worker Available Work Experience

	Primary	Second	Current Underuti- lized	Previous Underuti- lized
Administrative Support: Shipping/Receiving, Secretaries, Computer Operators, etc.	2,071		621	255
Business Office and Clerical Operations	2,454	87	759	1,117
Business Sales: Finance, Insurance, Real Estate, Wholesale, Industrial etc.	3,601	1,323	1,501	1,292
Computer Technology, Science, Math and Engineering (STEM)	4,754		1,205	2,370
Consumer Services Retail, Restaurant, Hotel, Food Services, etc.	7,862	2,483	3,923	441
Delivery/Drivers/Courier	3,088	498	655	392
Government Office and Clerical Operations	4,063	58	2,801	650
Health, Social, Community, Personal Care, and Recreation Services	9,318	3,875	2,599	5,754
Maintenance, Installations, and Repairs (Mechanic, Carpenter, Plumber, Electrician) etc.	2,843	392		2,555
Managerial, Executive, Business Owners, Farmers, Supervisory	5,381	1,792	1,404	1,327
Other Blue Collar: Laborers, Farm Hand, Janitor, Warehouse Workers, etc.	3,786	1,415	1,259	1,177
Other White Collar Workers	2,751	1,691	601	292
Production: Factory Assembly, Fabrication, Construction and Mining	2,327		617	1,593
Professional: Doctors, Lawyers, Engineers, Accountants, Professors, Consultants, etc.	4,230	1,205	1,235	1,599
Protective: Police/Fire/ Military/Regulators/investigators and Postal	3,547	1,288	1,705	1,334
Teachers, Instructors, Trainers, Writers, Researchers, etc.	4,958	1,682	163	564
Worker Available	**67,034**	**17,789**	**21,049**	**22,711**

Worker Available Work Experience
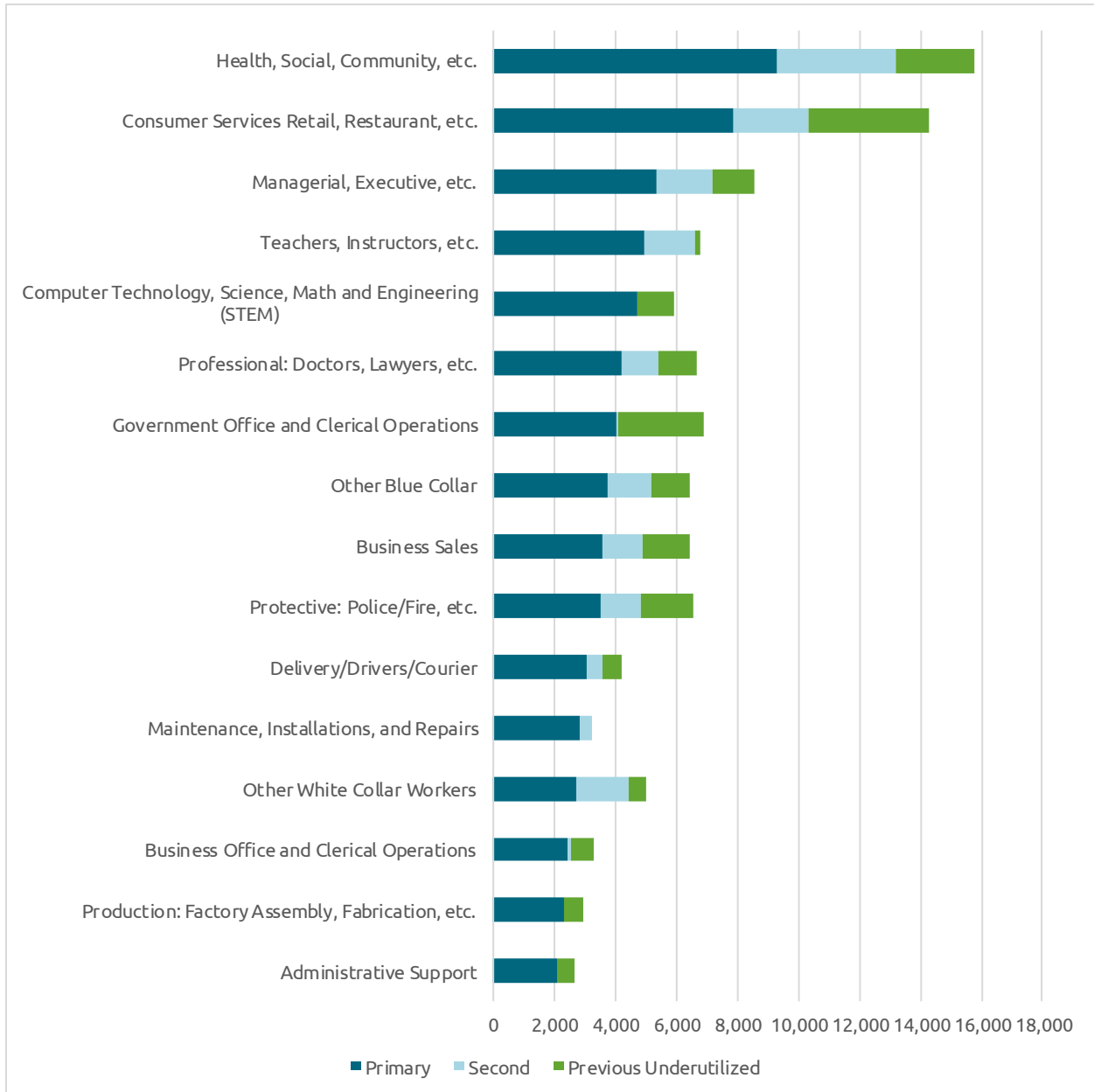
The chart shows the same information as presented in the table on the previous page but in a graphical format and without the currently underutilized. The visual shows a good mix of current and related work experience and those who indicated availability and as currently employed. The Health, Social, Community, etc. occupation type shows opportunities with almost 16,000 identifying 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 CNBC, 44 million people, roughly 70 percent of recent graduates, have an average debt load of $37,172. It is for this reason that student debt is addressed in this study.

The data indicate that 32.5 percent of the 18-29 year-olds have student debt. This compares to 19.6 percent for the 30-54 year-olds and just 4.7 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 debt is much wider for those in the middle age group. The 55-64 year-olds have minimal student debt.

*https://www.cnbc.com/2018/02/15/heres-how-much-the-average-student-loan-borrower-owes-when-they-graduate.html

Student Debt by Age Group

	18 - 29	30 - 54	55 - 64
Have Debt	**32.5%**	**19.6%**	**4.7%**
$15,000 or less	38.0%	17.2%	89.5%
$15,001 - $27,480	6.9%	20.4%	0.0%
$27,481 - $39,969	43.3%	3.7%	0.0%
$39,970 - $53,880	0.0%	11.6%	0.0%
$53,881 - $65,880	7.5%	12.2%	10.5%
$65,881 - $77,880	0.0%	6.1%	0.0%
$77,880 - $89,400	0.0%	8.6%	0.0%
Over $89,400	4.3%	7.9%	0.0%
No Response	0.0%	12.2%	0.0%

Student Debt Current and Total Available Workforce
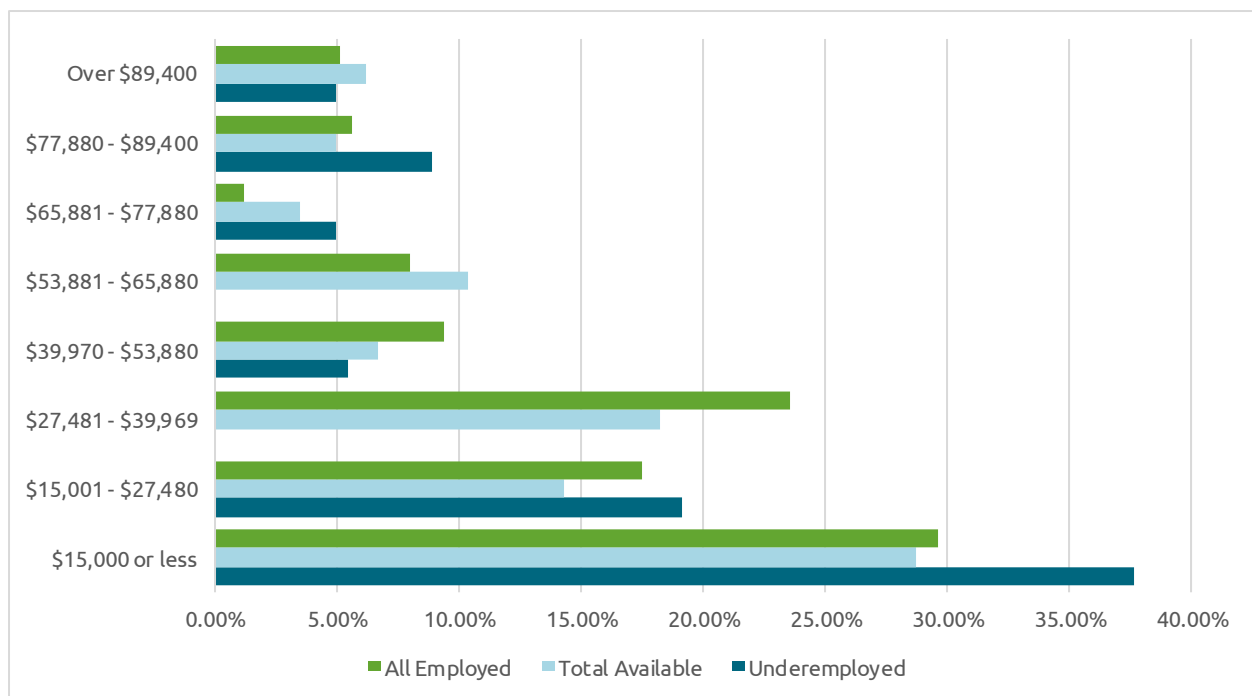
The chart represents the percentage of the various groups of underemployed, total available workforce, and all employed have in debt compared to each other.

Household Income

The household income clearly shows the younger 18-29 age group with 32.6 percent having household income of $27,480 or less compared to the 30-54 age group's 18.4 percent and the 55-64 age group's 19.8 percent. For the 18-29 age group, 13.9 percent have a household income over $89,400 compared to 28.0 percent of the 30-54 age group and 27.6 percent for the 55-64 age group.

Household Income by Age Group

	18 - 29	30 - 54	55 - 64
$15,000 or less	11.7%	13.1%	7.4%
$15,001 - $27,480	20.9%	5.2%	12.3%
$27,481 - $39,969	16.1%	11.7%	4.6%
$39,970 - $53,880	4.9%	16.6%	16.6%
$53,881 - $65,880	9.5%	7.3%	0.9%
$65,881 - $77,880	11.0%	10.7%	15.6%
$77,880 - $89,400	4.0%	6.3%	9.8%
Over $89,400	13.9%	28.0%	27.6%
No Response	8.2%	1.1%	5.0%

Household Income Current and Total Available Workforce
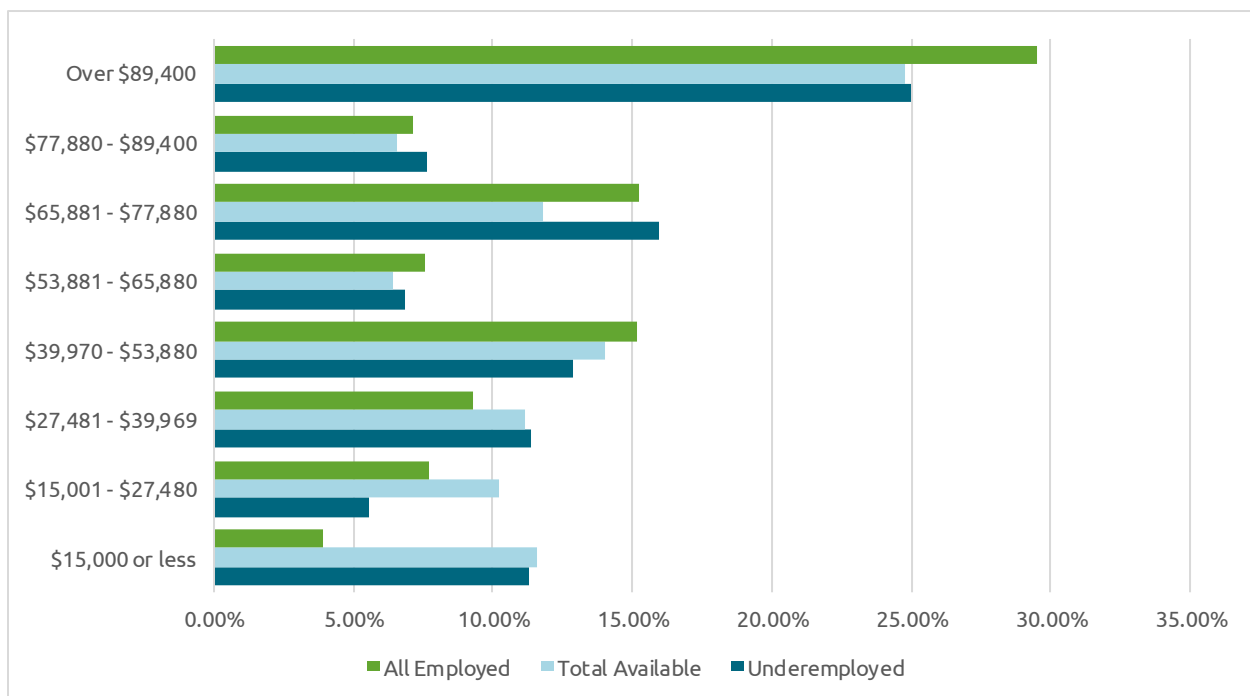
The chart represents the percentage of the various groups of underemployed, total available workforce, and all employed have in household income compared to each other.

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

Worker Available Breakout

Category 18-64	Overall	Percent
Total Available	82,082	100.0%
Worker Available Workforce	**67,034**	**81.7%**
Underemployed	21,049	25.6%
Seeking Different Employment	14,851	18.1%
Willing To Change	31,134	37.9%

available workforce. The results of this workforce survey show that 81.7 percent of the respondents identified themselves as part of the total available workforce and were worker available at the time they were contacted with the other 18.3 percent as non-worker available.

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
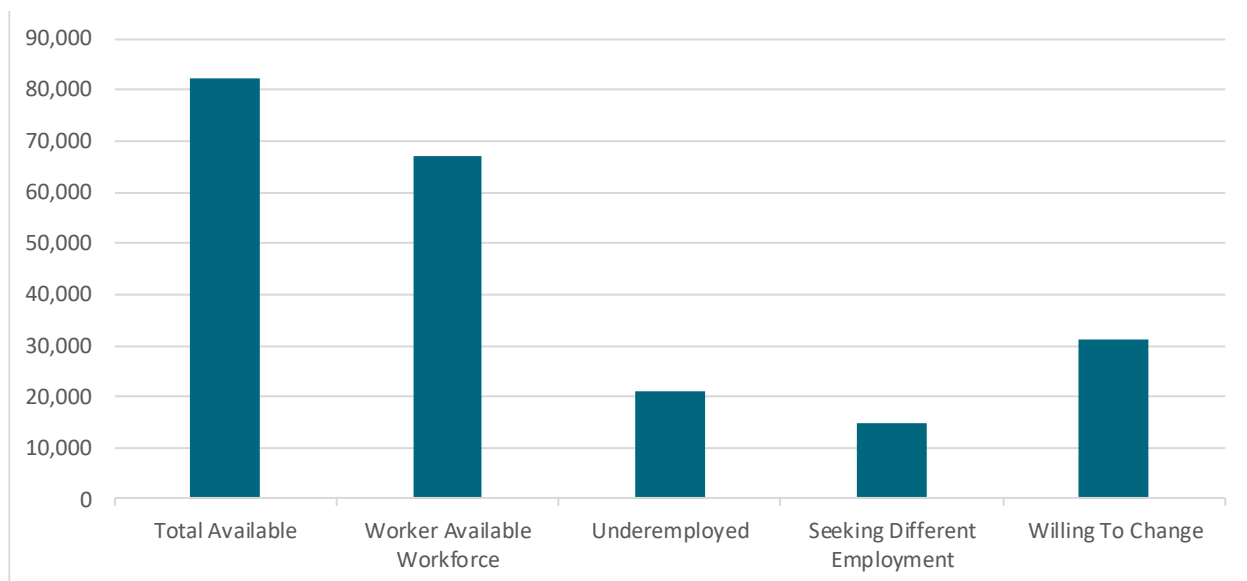
Underemployed

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 21,049 in this group are included in 67,034 members of the worker available workforce. By looking at the next two pages one can see some similarities with seeking and willing to change subset and the underemployed.

Age and Gender
The average age of this group is 41 years of age. The respondents are distributed among all age ranges: 18 to 29 (27.9%), 30 to 54 (50.8%), and 55 to 64 (21.4%). Males and females represent 38.7 percent and 61.3 percent respectively.

Education and Training
53.4 percent of the underemployed respondents in the ALM have some college or Associate's degree, 31.3 percent hold a Bachelor's degree, and the other 15.2 percent have an advanced degree. This compares to 81.0 percent of the total available workforce with post-high school education.

20.1 percent of the underemployed respondents stated that experience, training, and educational opportunities would be important in accepting a new job. Salary is the most important benefit for this group (79.0%) when considering new employment.

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 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. 62.4 percent of the underemployed are in the Service Producing sector.

Underemployed Workforce Characteristics

Underemployed	21,049
Years on Job	6.0
Willing to Commute One Way	27.6
Current Average Wage	$18.30
Desired Average Wage	$23.67
Household Income	$59,767
Average Age	41.2
Male/Female Ratio	38.7/61.3
Working a Second or Part Time Job	25.5%
Only Job Part Time or Temporary	18.1%
Employer Doesn't Provide Health Insurance	24.8%
Has No Health Insurance	16.3%
Has No Retirement Benefits	46.8%

Underemployed Education Attainment

Less than high school	0.0%
High school or equivalent	0.0%
Some college or associate's degree	53.4%
Bachelor's degree	31.3%
Advanced degree	15.2%

Underemployed Primary Industry Sector/Past Employment

Goods Producing	9.7%
Service Providing	62.4%
Government/Education	27.9%

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 14,851 in this group are included in the 67,034 worker available group 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 fewer years on the job, lower current wages, lower household income, a higher percentage with no health insurance or retirement benefits, and lower levels of education.

Age and Gender

The average age of this group is 41 years of age. The respondents are distributed among all age ranges: 18 to 29 (24.2%), 30 to 54 (66.2%), and 55 to 64 (9.6%). Males and females represent 52.3 percent and 47.7 percent respectively.

Education and Training

44.1 percent of respondents only have a high school or equivalent degree. 38.7 percent of the Seeking Different Employment respondents in the ALM have some college or Associate's degree, 13.4 percent hold a Bachelor's degree, and the other 3.7 percent have an advanced degree. This compares to 81.0 percent of the total available workforce with post-high school education.

27.5 percent of the underemployed respondents stated that experience, training, and educational opportunities would be important in accepting a new job. Salary is the most important benefit for this group (67.7%) when considering new employment.

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 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. 68.7 percent of the Seeking Different Employment are in the Service Producing sector.

Seeking Workforce Characteristics

Seeking Different Employment	14,851
Years on Job	8.0
Willing to Commute One Way	23.7
Current Average Wage	$14.94
Desired Average Wage	$16.33
Household Income	$46,967
Average Age	40.6
Male/Female Ratio	52.3/47.7
Working a Second or Part Time Job	9.2%
Only Job Part Time or Temporary	9.2%
Employer Doesn't Provide Health Insurance	39.6%
No Health Insurance	12.9%
No Retirement Benefits	42.7%

Seeking Education Attainment

Less than high school	0.0%
High school or equivalent	44.1%
Some college or associate's degree	38.7%
Bachelor's degree	13.4%
Advanced degree	3.7%

Seeking Primary Industry Sector/Past Employment

Goods Producing	21.9%
Service Providing	68.7%
Government/Education	9.4%

Willing to Change

The Worker Available Workforce in the ALM is 67,034. Those Willing to Change for the right opportunity number 31,134. See the following table for more characteristics of this group.

Age and Gender

The average age of this group is 42 years of age. The respondents are distributed among all age ranges: 18 to 29 (21.3%), 30 to 54 (52.8%), and 55 to 64 (25.9%). Males and females represent 59.3 percent and 40.7 percent respectively.

Education and Training

13.7 percent of respondents only have a high school or equivalent degree. 23.7 percent of the Willing to Change respondents in the ALM have some college or Associate's degree, 38.9 percent hold a Bachelor's degree, and the other 23.1 percent have an advanced degree. This compares to 81.0 percent of the total available workforce with post-high school education.

19.2 percent of the Willing to Change respondents stated that experience, training, and educational opportunities would be important in accepting a new job. Health Care is the most important benefit for this group (76.3%) when considering new employment.

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 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. 42.8 percent of the Willing To Change segment is in the Service Producing sector.

Willing to Change Workforce Characteristics

	Overall
Willing to Change	31,134
Years on Job	8.9
Willing to Commute One Way	27.4
Current Average Wage	$26.74
Desired Average Wage	$31.11
Household Income	$72,967
Average Age	42.3
Male/Female Ratio	59.3/40.7
Working a Second or Part Time Job	9.2%
Only Job Part Time or Temporary	6.7%
No Employer-Provided Health Insurance	21.2%
No Health Insurance	5.7%
No Retirement Benefits	21.6%

Willing to Change Education Attainment

	Overall
Less than high school	0.6%
High school or equivalent	13.7%
Some college or associate's degree	23.7%
Bachelor's degree	38.9%
Advanced degree	23.1%

Willing to Change Primary Industry Sector/Past Employment

Goods Producing	20.6%
Service Providing	42.8%
Government/Education	36.6%

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.

Non-worker Breakout

Category 18-64	Overall	Percent
Total Available*	82,082	100.0%
Non-worker Available (Willing To Work)	**15,048**	**18.3%**
Unemployed	11,127	13.6%
Homemaker	718	0.9%
Retired	3,202	3.9%

Including these subsets in the analysis provides a more accurate assessment of the potential workforce in the ALM. Of the respondents interviewed, 18.3 percent stated they were non-working. By questioning these respondents about seeking employment or their willingness to accept an employment offer, the survey identified 15,048 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 Available Population
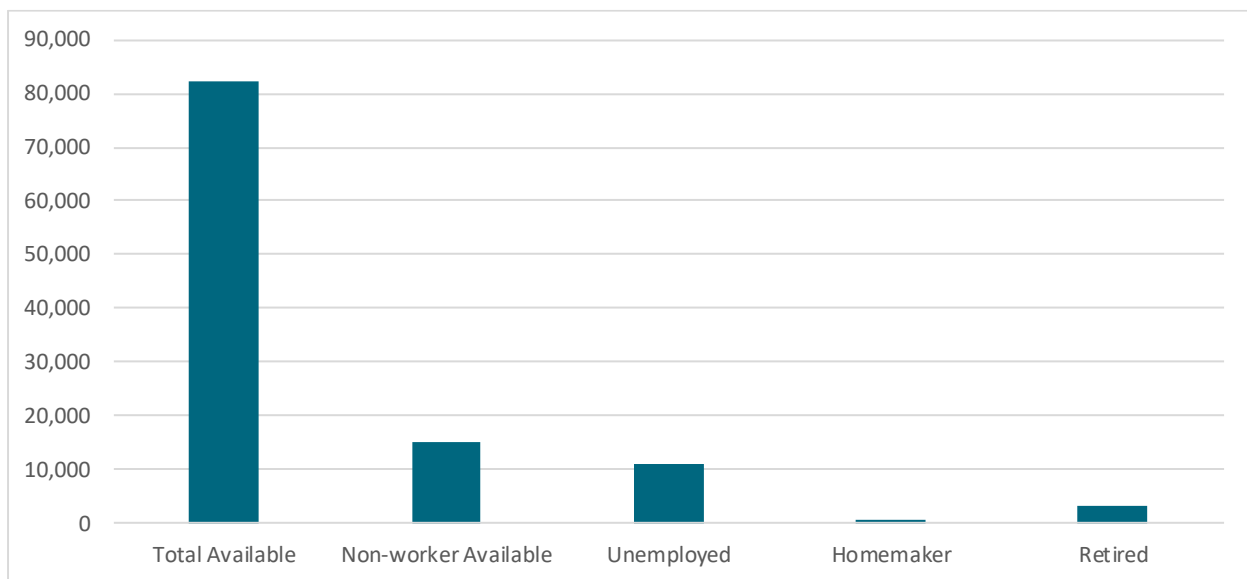
Unemployed

Of those who responded who are unemployed, 100 percent are actively seeking employment. The following table provides the general characteristics of this subdivision.

Age and Gender

The average age of this group is 43.0 years of age. The respondents are distributed among all age ranges: 18 to 29 (16.2%), 30 to 54 (63.3%), and 55 to 64 (20.5%). Men make up 53.7 percent and women 46.3 percent seeking or willing to accept employment.

Education and Training

59.8 percent of the unemployed respondents in the ALM have some post-high school education. In comparing the unemployed subset to other subsets, the unemployed tend to be some of the least educated with only 59.8 percent having some college compared to the total available workforce population at 81.0 percent.

Reason Unemployed

Of those who identified themselves as unemployed (11,127), 22.9 percent stated that it was due to being terminated and another 10.3 percent cite disability. 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, 51.2 percent state job availability. Transportation and child care combined to account for 12.4 percent and may be limiting factors for some potential workers.

Unemployed Workforce Characteristics

Unemployed	11,127
Seeking Employment	11,127
Commute One Way	23.4
Desired Average Wage	$15.15
Average Age	43.0
Male/Female Ratio	53.7/46.3
Household Income	$32,761

Unemployed Education Attainment

Less than high school	19.1%
High school or equivalent	21.1%
Some college or associate's degree	46.1%
Bachelor's degree	12.9%
Advanced degree	0.8%

Reason Unemployed

Major Layoff or Plant Closing	13.3%
Fired/Released	22.9%
Never Employed	12.5%
Disabled	10.3%
Other Income	9.4%
No Response	31.6%

Reason Can't Find Job

Job Availability	51.17%
Lacking Necessary Skills	8.76%
Compatibility/Personality	3.96%
Lack High School Diploma	14.45%
Transportation	3.96%
Child Care	8.42%
Not Interested/Other	4.90%
No Response	4.38%

Homemakers

Of those who responded as homemakers, 65.2 percent are actively seeking employment. It is estimated that 250 are willing to enter or return to work if presented with the right opportunity. The 718 represents both those seeking employment (468) and those willing with the right opportunity (250). The following table provides the general characteristics of this subdivision.

Age and Gender

The mean or average age of this group is 41 years of age compared with 42 years of age in the overall working group. The respondents are distributed among age ranges: 30 to 54 (90.3%), and 55 to 64 (9.7%). Women made up 100 percent of the respondents in this group.

Education and Training

90 percent of the homemaker respondents in the ALM have some post-high school education with 0 percent earning four-year degrees or higher.

Homemakers rated Experience, Training, and Educational opportunities 32.7% in terms of importance. Childcare is the most important benefit for this group (80.2%) when considering new employment.

Homemaker Workforce Characteristics

Homemaker	718
Seeking Employment	468
Commute One Way	19.7
Desired Average Wage	$12.03
Average Age	41.2
Male/Female Ratio	0/100
Household Income	$36,786

Homemaker Education Attainment

Less than high school	0.00%
High school or equivalent	10.05%
Some college or associate's degree	89.95%
Bachelor's degree	0.00%
Advanced degree	0.00%

Retired

Of those who responded as being retired, 5.9 percent are actively seeking employment. It is estimated that 3,014 are willing to return to work if presented with the right opportunity. The 3,202 represents both those seeking employment (188) and those willing with the right opportunity (3,014). 94.1 percent cite disability as the reason for their retirement. In reality many of those Retired indicating availability may be less acceptable on the demand side of today's labor market than some other categories of the available workforce. The following table provides the general characteristics of this subdivision.

Retired Workforce Characteristics

Retired	3,202
Seeking Employment	188
Commute One Way	20.6
Desired Average Wage	$14.55
Average Age	53.1
Male/Female Ratio	19.6/80.4
Household Income	$18,025

Retired Education Attainment

Less than high school	0.0%
High school or equivalent	2.7%
Some college or associate's degree	95.1%
Bachelor's degree	0.0%
Advanced degree	2.2%

Age and Gender

The mean or average age of this group is 53 years of age compared with 42 years of age in the overall working group. The respondents are distributed among all age ranges: 18 to 29 (13.8%), 30 to 54 (41.7%), and 55 to 64 (44.6%). Men make up 20 percent and women 80 percent.

Education and Training

97 percent of retired respondents in the ALM have some post-high school education with 2 percent earning four-year degrees or higher. This group represents a significant pool of experienced and educated workers but also higher opportunity costs to get them back in the labor market.

Retirees rated Experience, Training, and Educational opportunities 27.1% in terms of importance. Closer to home is the most important benefit for this group (75.9%) when considering new employment.

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 Increase and Health Benefits appear to be the top motivators for changing jobs, with Retirement benefits and Flexible hours following. A Salary Increase rated higher for the worker available (73%) than the non-worker available (47%), while those in the non-worker available valued childcare and flexible hours more than worker available.

Desired Benefits by Group

Category	Availa-ble	Worker	Under-employed	Non-worker	Un-employed
Health Benefits	65%	69%	60%	47%	47%
Experience, Training, Education	24%	21%	20%	34%	36%
Salary Increase	68%	73%	79%	47%	54%
Retirement benefits	44%	48%	59%	26%	33%
On-site childcare	4%	3%	3%	10%	8%
Flexible hours	39%	39%	28%	42%	35%
Different community	7%	8%	4%	4%	6%
Job significantly closer to home	15%	10%	12%	38%	28%
Other	6%	7%	14%	3%	4%

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

The underemployed, which is a subset of the worker available workforce, value Salary Increase more than any other group.

Available Workforce Desired Benefits

Categories (top to bottom): Health benefits, Experience, Training, Education, Salary increase, Retirement benefits, On-site childcare, Flexible hours, Different community, Job significantly closer to home, Other

Legend: ■ Available ■ Worker ■ Underemployed ■ Non-worker ■ Unemployed
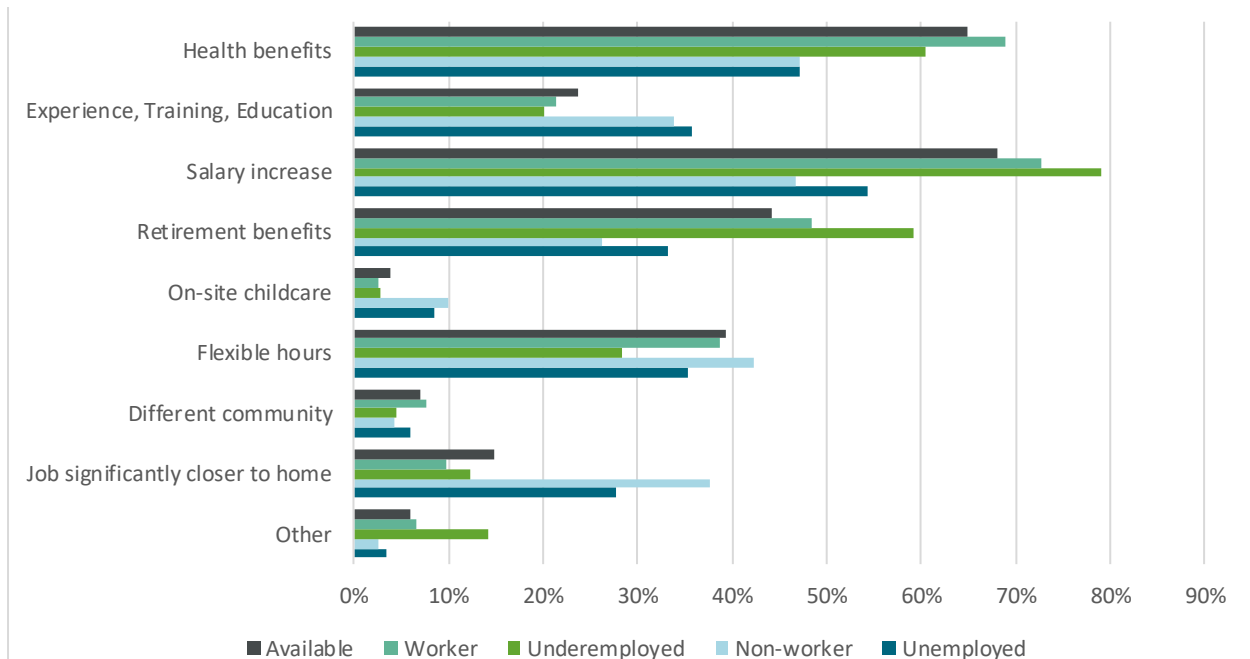
Desired Wage Rate Ranges

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.

4.9 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 48,022 people or 58.5 percent of the total available workforce would be interested in a new or different employment with a wage of up to $24.99. 14.1 percent would require $35.00 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
4.9%	2.4%	0.9%	7.2%
$13.00 - $13.99	$14.00 - $15.99	$16.00 - $17.99	$18.00 - $19.99
4.2%	19.2%	4.0%	0.6%
$20.00 - $21.99	$22.00 - $24.99	$25.00 - $27.99	$28.00 - $30.99
11.0%	4.1%	12.4%	10.4%
$31.00 - $33.99	$34.00 - $36.99	$37.00 - $39.99	$40.00 or more
4.6%	1.6%	0.3%	12.3%

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.

On November 6, 2018–after the survey period for this study–Missourians voted to raise the state's minimum wage to $12 an hour by 2023, a 52.9 percent increase over five years from the current $7.85 minimum wage. This will compress the desired wage ranges presented in this study, as 8.3 percent of respondents indicated a desired wage that is lower than the new 2023 minimum. Members of the total available workforce in other desired wage ranges will also likely have higher desired wages in the future, relative to the scheduled increases to the state's minimum wage.

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	4,058	4.9%	699	1.0%	3,414	22.7%	527	2.5%
$10.00 - $14.99	13,335	16.2%	9,133	13.6%	4,239	28.2%	2,464	11.7%
$15.00 - $19.99	18,252	22.2%	13,584	20.3%	4,695	31.2%	4,591	21.8%
$20.00 - $24.99	12,376	15.1%	11,615	17.3%	730	4.8%	4,988	23.7%
$25.00 - $29.99	11,811	14.4%	10,347	15.4%	1,449	9.6%	4,490	21.3%
$30.00 - $34.99	10,643	13.0%	10,603	15.8%	0	0.0%	1,591	7.6%
Over $35.00	11,607	14.1%	11,053	16.5%	521	3.5%	2,398	11.4%
Total:	82,082	100.0%	67,034	100.0%	15,048	100.0%	21,049	100.0%

Desired Wage Rate By Industry and Occupation

The Government/Education industry sector has the highest desired wage of $31.02 with the Services Providing industry sector having the lowest at $22.08. The Management occupation group has the highest desired wage at $34.43 and the Non-Worker group have the lowest at $14.87.

Desired Wage Rate by Industry

Category	
Government / Education	$31.02
Goods Producing	$27.68
Service Providing	$22.08

Desired Wage Rate by Occupation

Management	$34.43
Production/Repair/Installation	$20.96
Professional/Technical	$31.93
Services	$21.22
Non-Working Available	$14.87

Desired Wage Rate by Percent of Available Workforce
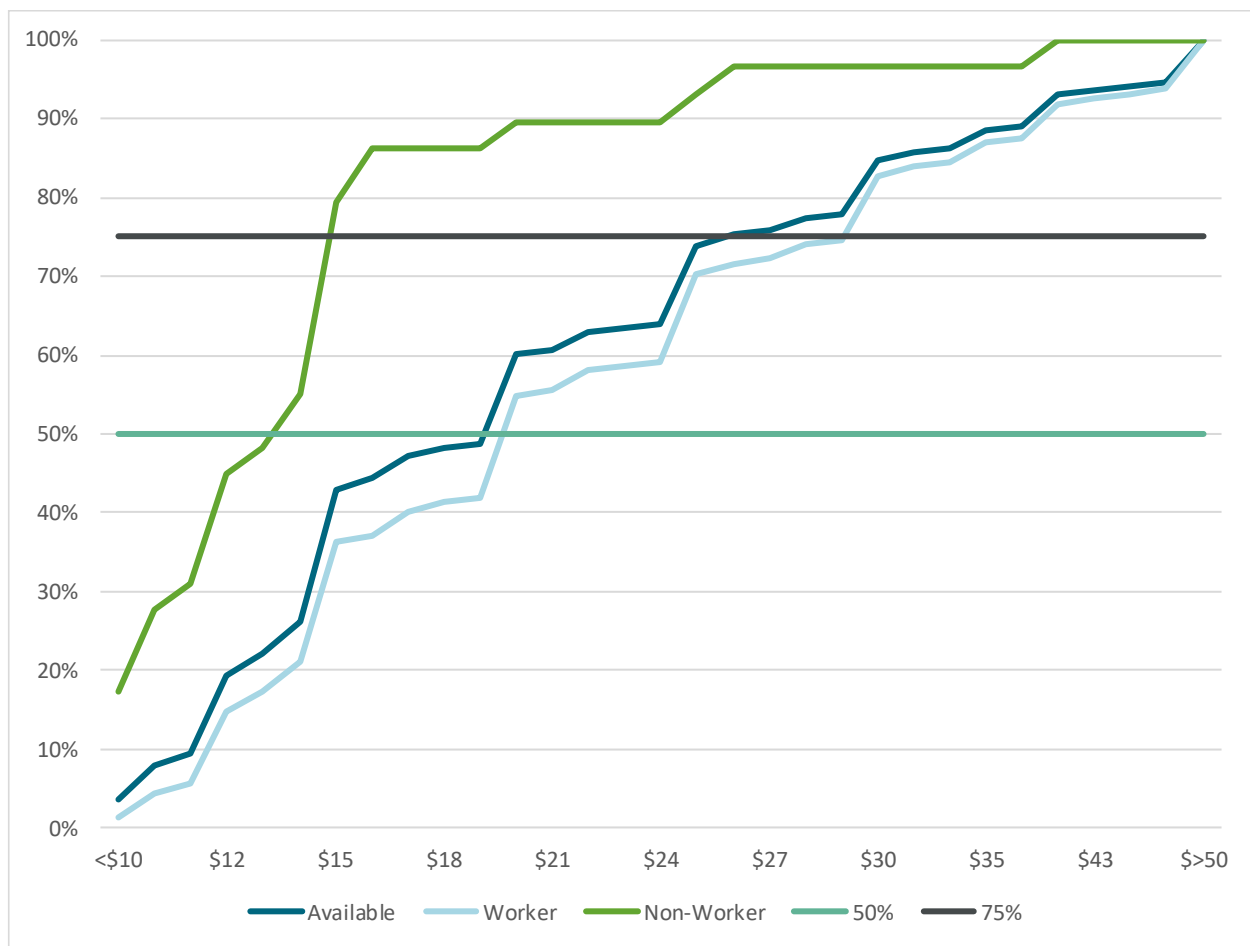
The higher the level of desired wage, the higher the percentage of the population that would take that wage. About 50 percent of the population would be satisfied with $19.00 an hour or less and about 75% of the population would be satisfied with $26.00 an hour or less.

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 Professional occupation clusters indicate the lowest desired wage increase (18.4%) compared to the worker available workforce (21.1%); those in the Production occupation clusters have the highest desired wage increase (23.7%).

The three occupation groups: Teachers, Instructors, Trainers, Writers, Researchers, etc.; Maintenance, Installations, and Repairs (Mechanic, Carpenter, Plumber, Electrician) etc.; and Computer Technology, Science, Math and Engineering report the highest disparities (between $6.70 and $8.59) in their actual and desired wages. These groups are likely to be motivated by new opportunities with higher salaries.

Occupation Actual and Desired Wages

	Available Workforce	Average Actual Wage	Average Desired Wage
Management	**5,381**	**$28.69**	**$34.43**
Managerial, Executive, Business Owners, Farmers, Supervisory	5,381	$28.69	$34.43
Production/Repair/Installation	**5,170**	**$16.94**	**$20.96**
Maintenance, Installations, and Repairs, etc.	2,843	$18.75	$25.78
Production: Factory Assembly, Fabrication, Construction, and Mining	2,327	$15.14	$17.59
Professional/Technical	**21,090**	**$26.97**	**$31.93**
Business Sales: Finance, Insurance, Real Estate, Wholesale, Industrial, etc.	3,601	$38.85	$42.21
Professionals: Doctors, Lawyers, Engineers, Accountants, Professors, etc.	4,230	$35.31	$33.53
Computer Technology, Science, Math, and Engineering	4,754	$25.50	$32.21
Protective: Police/Fire/Military/Regulators/Investigators and Postal	3,547	$15.99	$20.08
Teachers, Instructors, Trainers, Writers, Researchers, etc.	4,958	$22.42	$31.01
Services	**35,393**	**$17.53**	**$21.22**
Administrative Support: Shipping/Receiving, Secretaries, Computer Operators, etc.	2,071	$14.63	$16.87
Business Office and Clerical Operations	2,454	$14.77	$16.55
Consumer Services, Retail, Restaurant, Hotel, Food Services, etc.	7,862	$10.04	$14.62
Delivery/Drivers/Couriers	3,088	$15.62	$16.54
Government Office and Clerical Operations	4,063	$20.59	$23.83
Health, Social, Community, Personal Care, and Recreation Services	9,318	$22.65	$28.03
Other Blue Collar: Laborers, Farm Hand, Janitor, Warehouse Workers, etc.	3,786	$20.91	$22.62
Other White Collar Workers	2,751	$18.70	$21.23
Non-Worker Available	**15,048**	**N/A**	**$14.87**
Homemaker	718	N/A	$12.03
Retired	3,202	N/A	$14.55
Unemployed	11,127	N/A	$15.15

Adjustments have been made to reflect anomalies in the survey data

Commuting Patterns and Preferences

The preferred commute of the worker available workforce in the Area Labor Market ALM is 27 minutes/miles one way. The overall commute preference of the total available workforce is 26 minutes/miles one way. The total available workforce indicates it is open to commuting for the right employment opportunity. The table shows 67,492 people or 82.2% percent of the total available workforce would commute more than 10 minutes/miles, one way, for work. It also shows that 29,755 people or 36.3% percent of the total available workforce are willing to travel more than 30 minutes/miles and 4,763 people, 5.8% 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 accepting of the fact that they will have to commute some distance to a new employer.

The table to the right illustrates the different commuting preferences of those who are employed and those who are non-employed. Those who are employed show a willingness to commute 27 minutes/miles one way to work. The three groups in the non-working group show a lower willingness to travel, approximately 23 minutes/ miles on average.

Preferred Distance/Travel Time

Less than 10 miles	12,277
10 - 30 miles	37,737
31 - 50 miles	24,992
51+ miles	4,763

Available Workforce Group Preferred Distance/Travel Time

Total Available Workforce	**26.0**
Worker Available Workforce	**26.7**
Underemployed	27.6
Seeking Different Employment	23.7
Willing To Change	27.4
Non-Worker Available Workforce	**22.6**
Unemployed	23.4
Homemaker	19.7
Retired	20.6

The non-working groups prefer a shorter commute but also are more open to part-time and more flexible work arrangements. In general, retired people are not as willing to commute long distances to work; however, those in the ALM are willing to travel 21 minutes/miles one way for the right employment opportunities.

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 the focus is on people and customer service vs. systems and process. There may also be differences in wages and benefits and other work-related characteristics.

Commuting by Occupation Group

	Minutes/ Miles
Management	28.0
Production/Repair/Installation	26.4
Professional/Technical	27.9
Services	25.8
Non-Working Available Workforce	22.6
Overall Average	26.0

Commuting by Industry Type

	Minutes/ Miles
Goods Producing	28.7
Government/Education	29.8
Service Providing	24.5

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 the ALM showed interest in People with 52 percent, Data with 25 percent, and Things with 22 percent.

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.

Willing To Change Primary Occupation

	Available Workforce	Willing To Change	Percent
Worker Available	**67,034**	**57,348**	**85.5%**
Underemployed	21,049	19,399	92.2%
Seeking Different Employment	14,851	12,846	86.5%
Willing To Change	31,134	25,103	80.6%
Non-Worker Available	**15,048**	**10,994**	**73.1%**
Unemployed	11,127	7,803	70.1%
Homemaker	718	646	90.0%
Retired	3,202	2,545	79.5%

Willing To Change Primary Industry Group

	Available Workforce	Willing To Change	Percent
Worker Available	**67,034**	**57,631**	**86.0%**
Underemployed	21,049	19,732	93.7%
Seeking Different Employment	14,851	11,571	77.9%
Willing To Change	31,134	26,328	84.6%
Non-Worker Available	**15,048**	**11,565**	**76.9%**
Unemployed	11,127	7,803	70.1%
Homemaker	718	646	90.0%
Retired	3,202	3,116	97.3%

Conclusion

This study assesses the supply side of labor and provides information for the Hannibal 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 labor force.

While considerable information is available surrounding workforce issues at the national and state levels, less information is available at the local and regional levels, resulting in inadequate 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	$320	$1,387	$16,640
$9	$360	$1,560	$18,720
$10	$400	$1,733	$20,800
$11	$440	$1,907	$22,880
$12	$480	$2,080	$24,960
$13	$520	$2,253	$27,040
$14	$560	$2,427	$29,120
$15	$600	$2,600	$31,200
$16	$640	$2,773	$33,280
$17	$680	$2,947	$35,360
$18	$720	$3,120	$37,440
$19	$760	$3,293	$39,520
$20	$800	$3,467	$41,600
$21	$840	$3,640	$43,680
$22	$880	$3,813	$45,760
$23	$920	$3,987	$47,840
$24	$960	$4,160	$49,920
$25	$1,000	$4,333	$52,000
$26	$1,040	$4,507	$54,080
$27	$1,080	$4,680	$56,160
$28	$1,120	$4,853	$58,240
$29	$1,160	$5,027	$60,320
$30	$1,200	$5,200	$62,400
$31	$1,240	$5,373	$64,480
$32	$1,280	$5,547	$66,560
$33	$1,320	$5,720	$68,640
$34	$1,360	$5,893	$70,720
$35	$1,400	$6,067	$72,800
$36	$1,440	$6,240	$74,880
$37	$1,480	$6,413	$76,960
$38	$1,520	$6,587	$79,040
$39	$1,560	$6,760	$81,120
$40	$1,600	$6,933	$83,200
$41	$1,640	$7,107	$85,280
$42	$1,680	$7,280	$87,360

Appendix B-Methodology

A primary goal of any Area Labor Market (ALM) or laborshed 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 laborshed.

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 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 a 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 laborsheds, 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 laborshed 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 laborshed reports can be developed. The survey questionnaire has to be uniform across the entire project area.

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