

# GSG

# Labor Supply Certification

Monroe County,  
Michigan

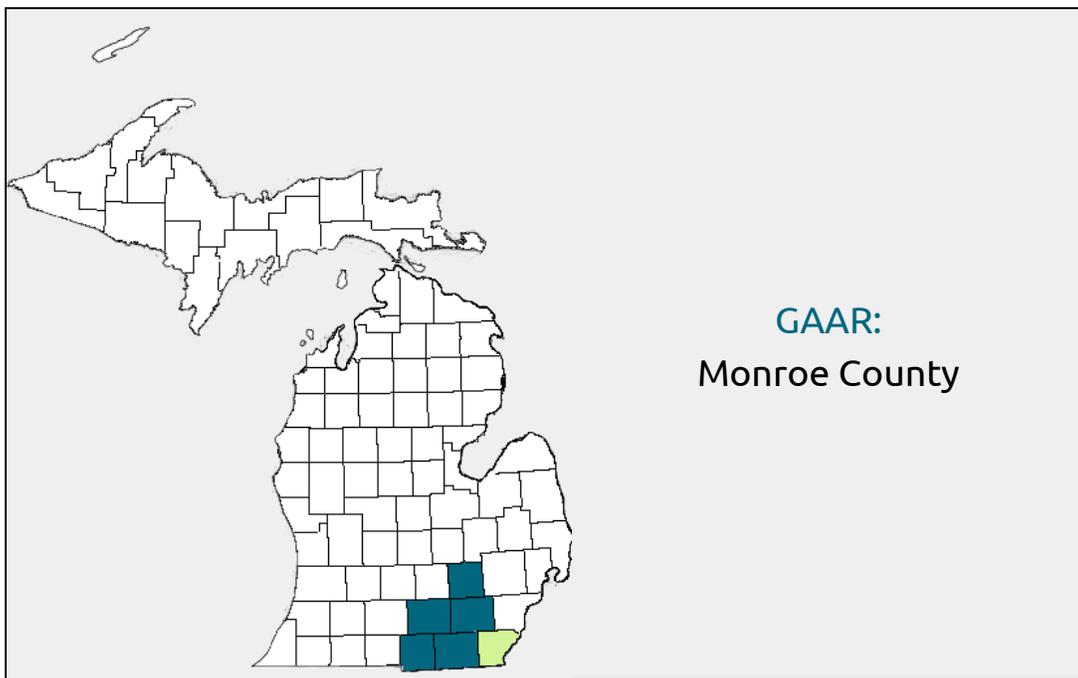
Underemployment

Available Skills

Desired Wages

# Monroe County Labor Supply Certification

Partners in Economic Development



## For Opportunity and Growth

August 2015



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# Executive Summary

## Introduction

The Monroe County Business Development Corporation (Monroe County) commissioned a Labor Supply Study to measure the amount and quality of potential employees in the Monroe County area labor market (ALM). The purpose of this report is to assess the available workforce for Monroe County. 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, Census Female Population Estimate, and the BLS Labor Force Estimate.

## General Findings, Opportunities, and Challenges

The Labor Supply Certification Study shows that Monroe County 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 66,230 persons in the **total available workforce**, 25,070 are considered **underemployed** (see more on page 11).

**Total Available Workforce**  
66,230

**Underemployed**  
25,070

With the right employment opportunities, the Monroe County ALM is positioned to retain and attract the talent necessary for growth of new and existing businesses representing regional, national, and international markets. Monroe County has several advantages. Its strategic location to Ann Arbor, Detroit, and Toledo provides easy access to a large talent pool and higher educational opportunities.

## 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 labor market. The overall findings are as follows:

- About 44 percent (66,230 persons) of the Census Population Estimate in the Overall Monroe County ALM is considered to be in the **total available workforce**.
- It is estimated 13,470 non-worker and 52,759 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 1,497 homemakers, 1,871 retirees, and 10,103 unemployed.
- The primary occupational clusters of the **worker available workforce** of the Monroe County

ALM include 8.9 percent in management, 10.2 percent in production/repair/installation, 24.5 percent in professional/technical, and 56.5 percent in service occupations with 13,470 available in the **non-worker available** in the unemployed, retired, and homemaker.

- Approximately 38 percent of the **total available workforce** (66,230 individuals) are **underemployed** (25,070).
- Twenty-two 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 \$29.34; production/repair/installation, \$19.63; service sector, \$19.11; and the **non-worker available** group, \$14.47.
- The education level of the **total available workforce** includes 76.5 percent with at least some college education and 98.0 percent with at least a high school diploma.
- The **total available workforce** is willing to commute an average of 23.1 minutes/miles. Currently, the working population commutes an average of about 23.9 minutes/miles. Of the **total available workforce**, 88.0 percent (58,237 people) would travel more than 10 minutes/miles one way for work while 20.3 percent (13,464) would commute more than 30 minutes/miles and 4.6 percent (3,045) would travel more than 50 minutes/miles.
- The overall average age of the **total available workforce** is 42.2. The average age of the **worker available workforce** by occupational cluster is 47.7 for management, 41.9 for production/repair/installation, 41.9 for professional/technical, and 41.9 for service sector.
- The top motivators for changing jobs among those open for the right opportunities are 73.8 percent salary, 57.4 percent Health Benefits, and 38.3 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 8.6 years which reflects both a stable and mature workforce.
- Approximately 32 percent (16,883 people) of the **worker available workforce** live inside Monroe County but work outside of Monroe County.
- 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 Monroe County 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 Monroe County 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 Monroe County ALM is part of a larger region with a common database and research methodology. This report also includes workers who are commuting out of the designated 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 targeted social media campaign of 1,188 adults living in the six counties of the GAAR ALM. GAAR, along with Monroe County, contracted with Growth Services Group (GSG) to design and administer the Labor Supply Study. Notionfront of Moberly, MO administered the social media campaign. In 1,188 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 1,188 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 will have a confidence level of 90 to 95 percent and the rest of the survey within 95 percent. A more detailed description of the survey process and methodology is presented in Appendix B.

### Total Available Workforce (Overview)

Category 18-64	Overall	Percent
<b>Total Available Workforce*</b>	66,230	100.0%
<b>Worker Available (Willing To Change)</b>	52,759	79.7%
Underemployed	25,070	37.9%
Seeking Different Employment	10,103	15.3%
Willing To Change	17,586	26.6%
<b>Non-worker Available (Willing To Work)</b>	13,470	20.3%
Unemployed	10,103	15.3%
Homemaker	1,497	2.3%
Retired	1,871	2.8%

\*While all those in the worker available workforce are willing to change with the right opportunity, 10,103 are seeking different employment and 25,070 are identified as underemployed and willing to change. The Willing to Change 17,586 are willing to change only for the right opportunity.

In the Non-worker 13,470, 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

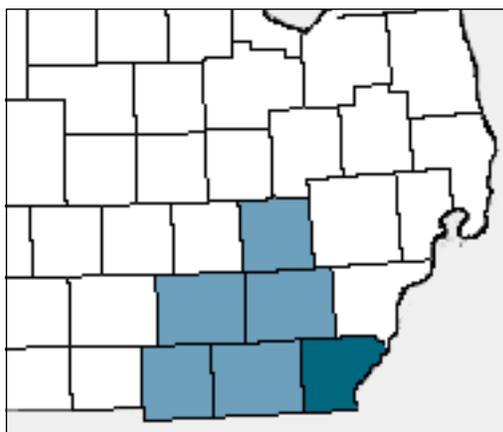
### Total Available Workforce

The following table describes the **total available workforce** in the Monroe County ALM. The **total available workforce** for Monroe County represents 66,230 people which consists of 52,759 working and 13,470 non-working. This demonstrates the workforce of the county is sufficient in scope and diversity to support most employers considering expansion or location in the magnet cities or counties of the Monroe County 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 Monroe County ALM. Each county is grouped into one of three categories specified in the legend, each of which are made up of multiple counties.

The summary table for the Monroe County ALM shows a **total available workforce** of 66,230, 67.9 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 52.0 percent and females 48.0 percent of the **total available workforce**. Those in the age 30–54 group consider themselves significantly more under-utilized or **underemployed** at 56.0 percent than those in the age 55–64 at 26.4 percent.

### Sources of Available Workforce in Monroe County



Category	Color
Rest of GAAR, 84.4%	Light Blue
Monroe County, 15.6%	Dark Blue

### Available Workforce Work Status

Category	Population	Percent
<b>Total Available Workforce</b>	66,230	100.0%
<b>Worker Available</b>	52,759	79.7%
Working Student	6,735	10.2%
Working (withholdings)	44,153	66.7%
Self-employed (no withholdings)	1,871	2.8%
Military	0	0.0%
<b>Non-Worker Available</b>	13,470	20.3%
Unemployed	7,858	11.9%
Homemaker	1,497	2.3%
Retired	1,871	2.8%
Non-working Student	2,245	3.4%

### Summary Workforce Results

Characteristics	Overall	Percent
<b>Population and Civilian Labor Force</b>		
Census Population Estimate	150,376	100.0%
Census 18–64 Population Estimate	97,533	100.0%
BLS Labor Force Estimate	74,836	100.0%
Census 18–64 Male Population Estimate	49,839	51.1%
Census 18–64 Female Population Estimate	47,694	48.9%
<b>Available Workforce</b>		
Total Available Workforce	66,230	100.0%
Male	34,440	52.0%
Female	31,790	48.0%
Age 18–29	17,617	26.6%
Age 30–54	33,910	51.2%
Age 55–64	14,703	22.2%
<b>Underemployed</b>		
Underemployed	25,070	100.0%
Male	12,485	49.8%
Female	12,585	50.2%
Age 18–29	4,412	17.6%
Age 30–54	14,039	56.0%
Age 55–64	6,618	26.4%

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

### 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. Out of the four occupational clusters, Management has a median age higher than the average age. The **Non-worker Available** has a lower average (40.2) than median age (42.0) due to a higher proportion of **underemployed** non-workers available. The average age for the **total available workforce** is 42.2 while the median age is 46.0.

### Average Age by Occupational Clusters

Category	Avg. Age	Med. Age
Management	47.7	49.0
Production/Repair/Installation	41.9	56.0
Professional/Technical	41.6	41.0
Services	41.9	42.0
Non-Worker Available	40.2	42.0

The three oldest occupation groups are: Delivery/Drivers/Courier; Teachers, Instructors, etc.; and Managerial, Executive, etc. The three youngest occupation groups are: Protective: Police/Fire, etc.; Maintenance, Installations, and Repairs, etc.; and Business Office and Clerical Operations.

The top three occupation groups by most years on the job are: Managerial, Executive, etc.; Computer Technology, Science, etc.; and Other White Collar Workers. The top three occupation groups by least years on the job are: Delivery/Drivers/Courier; Consumer Services Retail, etc.; and Protective: Police/Fire, etc.

### Available Workforce Average Age and Years on Job

	Average Age	Years on Job
Administrative Support: Shipping/Receiving, Secretaries, Computer Operators, etc.	46.8	4.7
Business Office and Clerical Operations	37.4	7.1
Business Sales: Finance, Insurance, Real Estate, Wholesale, Industrial etc.	38.7	6.1
Computer Technology, Science, Math and Engineering (STEM)	43.3	8.7
Consumer Services Retail, Restaurant, Hotel, Food Services, etc.	39.4	4.1
Delivery/Drivers/Courier	49.3	4.0
Government Office and Clerical Operations	39.4	7.1
Health, Social, Community, Personal Care, and Recreation Services	41.0	6.1
Maintenance, Installations, and Repairs (Mechanic, Carpenter, Plumber, Electrician) etc.	36.4	8.4
Managerial, Executive, Business Owners, Farmers, Supervisory	47.7	10.6
Other Blue Collar: Laborers, Farm Hand, Janitor, Warehouse Workers, etc.	42.6	5.8
Other White Collar Workers	42.8	8.5
Production: Factory Assembly, Fabrication, Construction and Mining	44.3	6.5
Professional: Doctors, Lawyers, Engineers, Accountants, Professors, Consultants, etc.	39.0	7.4
Protective: Police/Fire/ Military/Regulators/investigators and Postal	33.6	4.3
Teachers, Instructors, Trainers, Writers, Researchers, etc.	48.7	7.9

### 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 Monroe County ALM. The first column in the table shows the number of workers available employed in the various occupational groups.

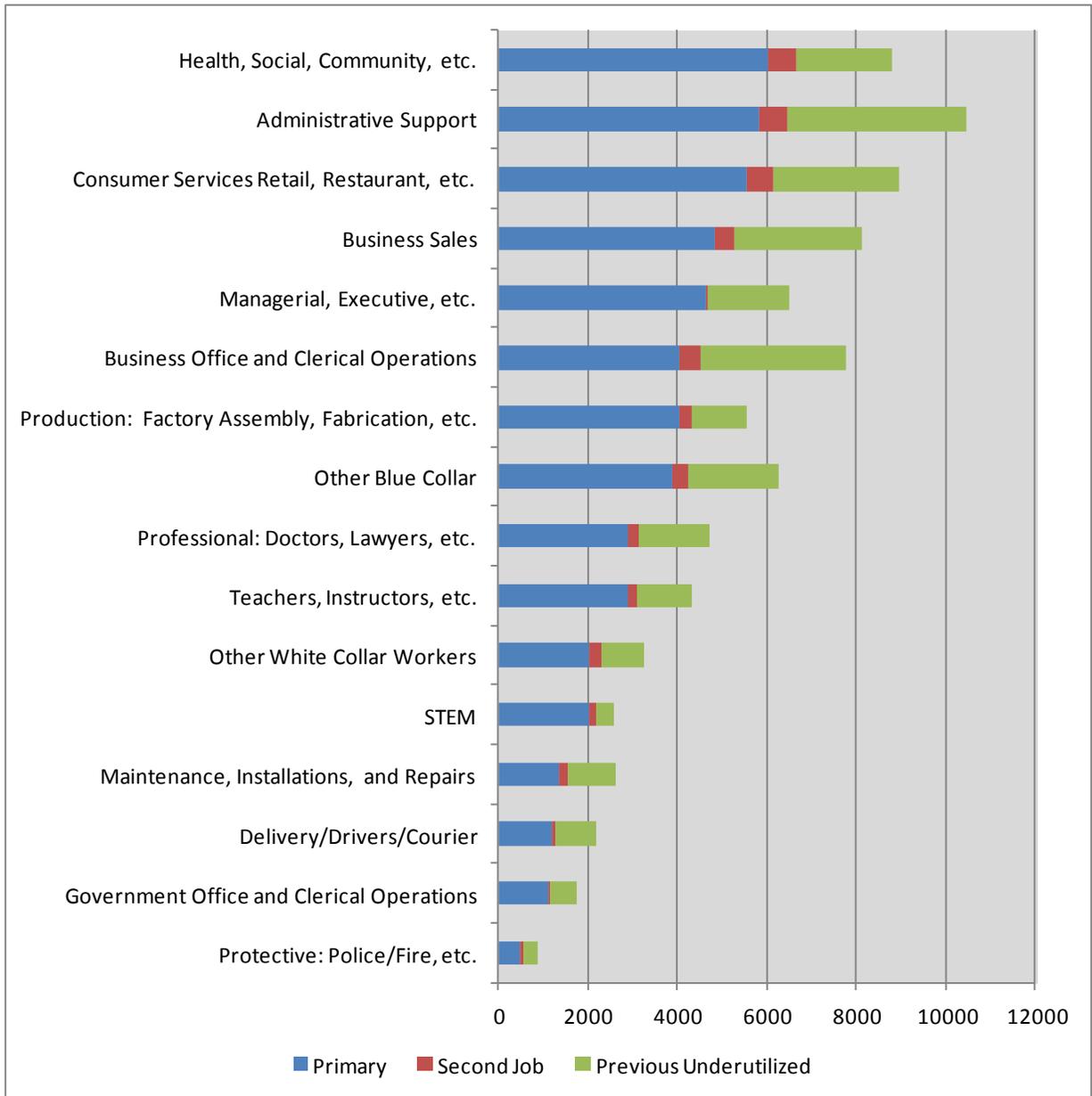
Respondents are indicating a high level of employment availability from the service sector in areas of health, social, and community care; administrative support, teachers, instructors, etc., and in the retail, hospitality, and food service occupations. However, the survey shows a workforce with skills,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

Of those **workers available** and currently employed, 8.9 percent also have second jobs. Eleven percent of Consumer Services, Retail, Restaurant, etc. have a second job, along with 14.8 percent of Maintenance, Installation, and Repair. Twenty-five percent of STEM occupations identify themselves as underutilized or underemployed. Fifty-seven percent of Consumer Services, Retail, Restaurant, etc. are underutilized with seven other occupation groups with over fifty percent identifying themselves as 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.	5,847	601	2,668	4,027
Business Office and Clerical Operations	4,027	502	1,763	3,222
Business Sales: Finance, Insurance, Real Estate, Wholesale, Industrial etc.	4,833	456	2,263	2,819
Computer Technology, Science, Math and Engineering (STEM)	2,014	156	500	403
Consumer Services Retail, Restaurant, Hotel, Food Services, etc.	5,541	602	3,168	2,819
Delivery/Drivers/Courier	1,208	56	905	919
Government Office and Clerical Operations	1,111	28	453	622
Health, Social, Community, Personal Care, and Recreation Services	6,041	603	4,073	2,140
Maintenance, Installations, and Repairs (Mechanic, Carpenter, Plumber, Electrician) etc.	1,361	202	453	1,050
Managerial, Executive, Business Owners, Farmers, Supervisory	4,625	52	2,310	1,840
Other Blue Collar: Laborers, Farm Hand, Janitor, Warehouse Workers, etc.	3,886	371	1,358	2,014
Other White Collar Workers	2,014	304	1,030	916
Production: Factory Assembly, Fabrication, Construction and Mining	4,027	305	2,918	1,208
Professional: Doctors, Lawyers, Engineers, Accountants, Professors, Consultants, etc.	2,916	211	905	1,611
Protective: Police/Fire/ Military/Regulators/investigators and Postal	491	49	125	320
Teachers, Instructors, Trainers, Writers, Researchers, etc.	2,916	198	905	1,208
Worker	52,759	4,696	25,797	27,138
Non-worker	13,470	N/A	N/A	7,483

## 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, maintenance, and installation, with over 8,000 indentifying themselves as available.

## Student Debt

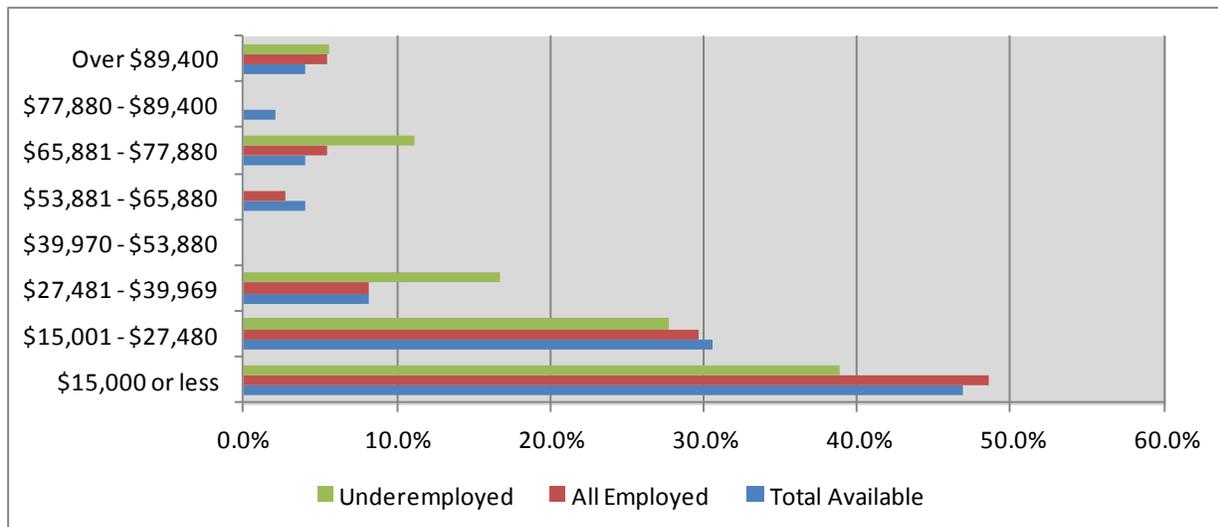
Student debt is a growing concern, and along with a necessary educated workforce is a challenge for our local and national economy. According to the Wall Street Journal 40 million people, roughly 70 percent of recent graduates, have an average debt load of \$33,000. It is for this reason that student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

The data indicates that 30.3 percent of the 18–29 year olds have student debt. This compares to 34.3 percent for the 30–54 year olds and 7.7 percent for the 55–64 year olds. The debt amounts for the **available workforce** shows a greater percentage of the 30-54 year olds in the **available workforce** having student debt.

### Student Debt by Age Group

	18 - 29	30 - 54	55 - 64
Have Debt	30.3%	34.3%	7.7%
\$15,000 or less	60.0%	38.9%	100.0%
\$15,001 - \$27,480	20.0%	36.1%	0.0%
\$27,481 - \$39,969	10.0%	8.3%	0.0%
\$39,970 - \$53,880	0.0%	0.0%	0.0%
\$53,881 - \$65,880	0.0%	5.6%	0.0%
\$65,881 - \$77,880	10.0%	2.8%	0.0%
\$77,880 - \$89,400	0.0%	2.8%	0.0%
Over \$89,400	0.0%	5.6%	0.0%
No Response	0.0%	0.0%	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 debt categories up to \$39,969 with over 47 percent having debt of \$15,000 or less.

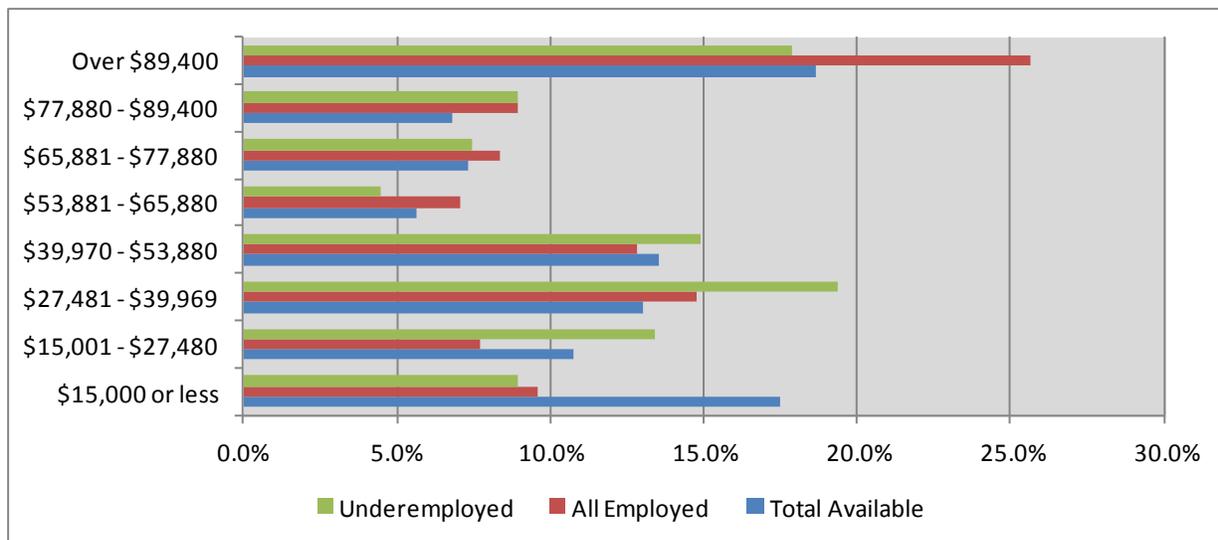
## Household Income

The household income clearly shows the younger 18–29 age group with 42.4 percent having household income of \$15,000 or less compared to 30–54 age group’s 13.3 percent and the 55–64 age group’s 7.7 percent. For the 18–29 age group 12.1 percent have a household income over \$65,880 compared to 39.0 percent of the 30–54 age group and 33.4 percent for the 55–64 age group.

### Household Income by Age Group

	18 - 29	30 - 54	55 - 64
\$15,000 or less	42.4%	13.3%	7.7%
\$15,001 - \$27,480	9.1%	9.5%	15.4%
\$27,481 - \$39,969	12.1%	12.4%	15.4%
\$39,970 - \$53,880	15.2%	15.2%	7.7%
\$53,881 - \$65,880	3.0%	6.7%	5.1%
\$65,881 - \$77,880	12.1%	7.6%	2.6%
\$77,880 - \$89,400	0.0%	7.6%	10.3%
Over \$89,400	0.0%	23.8%	20.5%
No Response	6.1%	3.8%	15.4%

### 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 lower percent responding in the lower income and a higher percent represented in the higher income.

## Worker Available Workforce

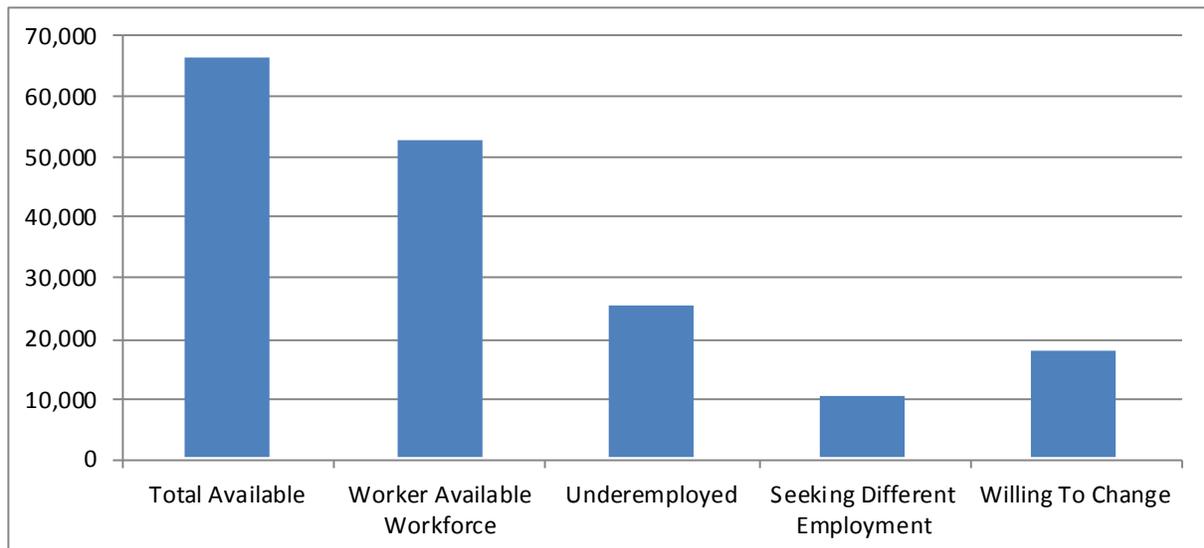
The willingness of the currently employed to change employment with the right opportunity is a key indicator in profiling the characteristics of the **total available workforce** in the Area Labor Market. The employed individuals who are willing or likely to change jobs with an existing or a different employer represent the primary pool of the **total available workforce**. The results of this workforce survey show that 79.9 percent of the respondents that identified themselves as part of the **total available workforce** were **worker available** at the time they were contacted with the other 20.3 percent as **non-worker available**.

### Worker Available Breakout

Category 18-64	Overall	Percent
<b>Total Available</b>	66,230	100.0%
<i>Worker Available Workforce</i>	52,759	79.7%
Underemployed	25,070	37.9%
Seeking Different Employment	10,103	15.3%
Willing To Change	17,586	26.6%

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. The 25,070 **underemployed** are included in 52,759 members of the **worker available workforce**. By looking at the tables one can see some similarities and differences between the seeking, willing to change, and underemployed subsets.

### 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 (24.8%), 30 to 54 (49.3%), and 55 to 64 (25.9%). Males and females represent 50 percent and 50 percent respectfully.

### Education and Training

Eighty-five percent of the **underemployed** respondents in the ALM have some college or associate degree with 24 percent having a bachelor's

or advanced degree. This compares to 76.5 percent of the **total available workforce** with post-high school education.

Thirty-one percent (31.3%) 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. Twenty-six percent of the **underemployed** are in the Goods Producing sector.

## Underemployed Workforce Characteristics

Underemployed	25,070
Years on Job	7.9
Willing to Commute One Way	25.6
Current Average Wage	\$19.01
Desired Average Wage	\$21.89
Household Income	\$50,899
Average Age	42.7
Male/Female Ratio	49.8/50.2
Working a Second or Part Time Job	10.5%
Only Job Part Time or Temporary	10.4%
Employer Doesn't Provide Health Insurance	20.9%
Has No Health Insurance	14.9%
Has No Retirement Benefits	38.8%

## Underemployed Education Attainment

Less than high school	0.0%
High school or equivalent	14.9%
Some college or associate's degree	58.2%
Bachelor's degree	19.4%
Advanced degree	7.5%
Underemployed	25,070

## Underemployed Primary Industry Sector/Past Employment

Goods Producing	26.3%
Service Providing	57.9%
Government/Education	15.8%
Underemployed	25,070

### 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 10,103 in this group are already included in 52,759 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 greater 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 37 years of age. The respondents are distributed among all age ranges: 18 to 29 (48.8%), 30 to 54 (44.3%), and 55 to 64 (6.9%). Males represent a lesser proportion (59/41) than females of those **seeking different employment**.

#### Education and Training

More than half (74.0%) of the subset have post high school education and 25.9 percent having a four-year degree or higher. The **seeking different employment** subset has a lower education attainment level of 74.0 percent with some post-high school education compared to 76.5 percent of the **total available workforce** of 66,230.

Thirty percent (30.0%) 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. Eighteen percent of the **seeking different employment** are in the Goods Producing sector.

### Seeking Workforce Characteristics

Seeking Workforce Characteristics	
Seeking Different Employment	10,103
Years on Job	6.1
Willing to Commute One Way	22.7
Current Average Wage	\$14.82
Desired Average Wage	\$16.57
Household Income	\$46,917
Average Age	37.3
Male/Female Ratio	58.7/41.3
Working a Second or Part Time Job	3.7%
Only Job Part Time or Temporary	29.6%
Employer Doesn't Provide Health Insurance	29.6%
No Health Insurance	33.3%
No Retirement Benefits	48.1%

### Seeking Education Attainment

Seeking Education Attainment	
Less than high school	3.7%
High school or equivalent	22.2%
Some college or associate's degree	48.1%
Bachelor's degree	18.5%
Advanced degree	7.4%
Seeking Different Employment	10,103

### Seeking Primary Industry Sector/Past Employment

Seeking Primary Industry Sector/Past Employment	
Goods Producing	18.5%
Service Providing	55.6%
Government/Education	25.9%
Seeking Different Employment	10,103

### Willing to Change

The **worker available workforce** in the Overall ALM is 52,759. Those willing to change number 17,586. See the following table for more characteristics of this group.

#### Age and Gender

The mean or average age of this group is 43 years. The respondents are distributed among all age ranges: 18 to 29 (12.8%), 30 to 54 (57.9%), and 55 to 64 (29.3%). Males and females represent a 50/50 proportion of those willing to accept different employment.

#### Education and Training

Eighty-nine percent of the **willing to change** respondents in the ALM have post high school education with 42.6 percent possessing a four-year degree or higher. The **willing to change** subset has a higher education attainment level of 89.4 percent with some post-high school education compared to 76.5 percent of the **total available workforce** of 66,230.

Twenty-one percent (21.3%) 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. Nineteen percent of the **willing to change** segment is in the Goods Producing sector.

### Willing to Change Workforce Characteristics

	Overall
Willing to Change	17,586
Years on Job	10.0
Willing to Commute One Way	22.1
Current Average Wage	\$26.41
Desired Average Wage	\$26.80
Household Income	\$64,465
Average Age	43.3
Male/Female Ratio	50.2/49.8
Working a Second or Part Time Job	8.5%
Only Job Part Time or Temporary	10.6%
No Employer-Provided Health Insurance	14.9%
No Health Insurance	10.6%
No Retirement Benefits	27.7%

### Willing to Change Education Attainment

	Overall
Less than high school	0.0%
High school or equivalent	10.6%
Some college or associate's degree	46.8%
Bachelor's degree	27.7%
Advanced degree	14.9%
Willing to Change	17,586

### Willing to Change Primary Industry Sector/Past Employment

	Overall
Goods Producing	19.1%
Service Providing	61.7%
Government/Education	19.1%
Willing to Change	17,586

## 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.

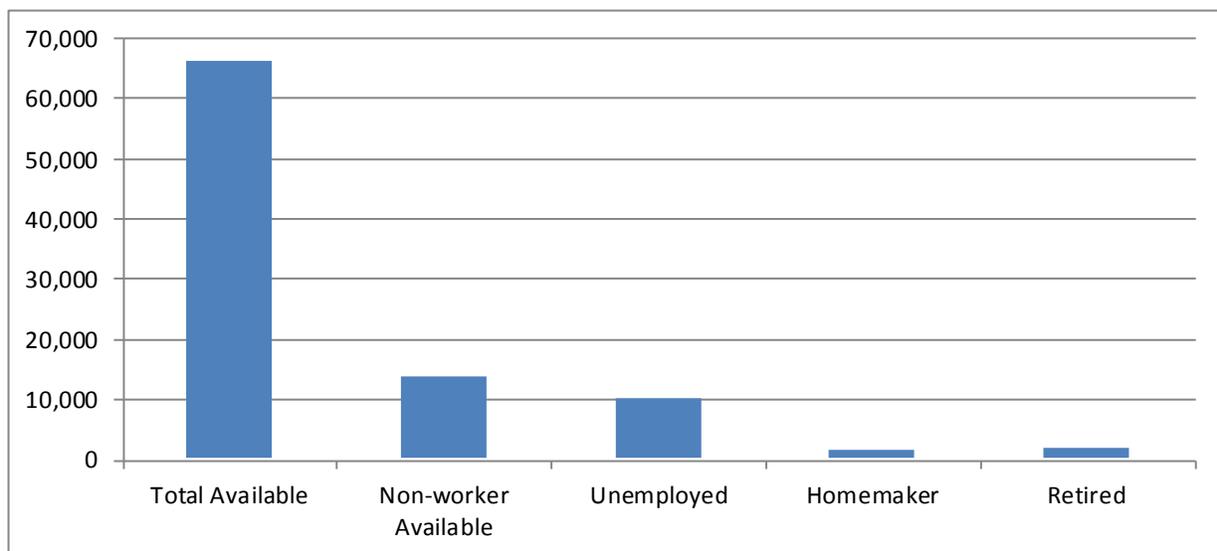
Including these subsets in the analysis provides a more accurate assessment of the potential workforce in the ALM. Of the respondents interviewed, 20.3 percent stated they were non-working. By questioning these respondents about seeking employment or their willingness to accept an employment offer, the survey identified 13,470 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
<b>Total Available*</b>	66,230	100.0%
<i>Non-worker Available (Willing To Work)</i>	13,470	20.3%
Unemployed	10,103	15.3%
Homemaker	1,497	2.3%
Retired	1,871	2.8%

## Non-worker Available Population



## Unemployed

Of those who responded who are **unemployed**, 85.2 percent are seeking employment with the right opportunity. It is estimated that 8,608 are willing to return to work if presented with the right opportunity. The 10,103 represent both those seeking employment (8,608) and those willing with the right opportunity (1,495). The following table provides the general characteristics of this subdivision.

### Age and Gender

The average age of this group is 37 years of age. The respondents are distributed among all age ranges: 18 to 29 (48.8%), 30 to 54 (44.3%), and 55 to 64 (6.9%). Men make up 58.7 percent and females 41.3 percent seeking or willing to accept employment.

### Education and Training

Sixty-three percent of the **unemployed** respondents in the ALM have post-high school education. In comparing the **unemployed** subset to other subsets shows the **unemployed** tend to be the least educated with only 63.0 percent having college and compares to the **total available workforce** at 76.5 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 15.3 percent of the **total available workforce**.

### Reason Unemployed

Of those who identified themselves as **unemployed** (10,103) 11.1 percent stated that it was due to a major layoff or plant closing and another 25.9 percent claim disability. Of this group more than half are seeking employment with the other 15 percent stating they would be available for the right opportunity. Eighteen 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, 51.9 percent state job availability while only 14.8 percent state that it is lacking necessary skills. Transportation and child care were stated by 14.8 percent and may be limiting factors for some potential workers.

## Unemployed Workforce Characteristics

Unemployed	10,103
Seeking Employment	8,608
Commute One Way	20.9
Desired Average Wage	\$14.62
Average Age	36.7
Male/Female Ratio	58.7/41.3
Household Income	\$22,825

## Unemployed Education Attainment

Less than high school	7.4%
High school or equivalent	29.6%
Some college or associate's degree	51.0%
Bachelor's degree	8.3%
Advanced degree	3.7%
Unemployed	10,103

## Reason Unemployed

Major Layoff or Plant Closing	11.1%
Fired/Released	18.5%
Never Employed	3.7%
Disabled	25.9%
Pension Income	0.0%
Other Income	3.7%
No Response	37.0%
Unemployed	10,103

## Reason Can't Find Job

Job Availability	51.9%
Lacking Necessary Skills	14.8%
Compatibility/Personality	0.0%
Lack High School Diploma	0.0%
Transportation	14.8%
Child Care	0.0%
Not Interested/Other	11.1%
No Response	7.4%
Unemployed	10,103

## Homemakers

Of those who responded as **homemakers**, it is estimated that 1,497 are willing to accept employment and will accept only with the right opportunity. The following table provides the general characteristics of this subset.

### 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 all age ranges: 18 to 29 (34.3%), 30 to 54 (41.5%), and 55 to 64 (24.2%), . Men make up 2.0 percent and females 98.0 percent seeking or willing to accept employment.

### Education and Training

Twenty-five percent of the **homemaker** respondents in the ALM have post-high school education with 5.0 percent earning four-year degrees or higher. In comparing the **homemaker** subset to the other subsets shows **homemakers** tend to be less educated with 25.0 percent with some college compared to the **total available workforce** at 76.5 percent.

Experience, training, and educational opportunities would be an important consideration in accepting a new job to 25.0 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. None of the **homemaker** subset have experience in the Goods Producing sector.

## Homemaker Workforce Characteristics

Homemaker Workforce Characteristics	
Homemaker	1,497
Commute One Way	12.5
Desired Average Wage	\$11.62
Average Age	40.5
Male/Female Ratio	2.0/98.0
Household Income	\$7,500

## Homemaker Education Attainment

Homemaker Education Attainment	
Less than high school	2.2%
High school or equivalent	72.8%
Some college or associate's degree	20.0%
Bachelor's degree	4.2%
Advanced degree	0.8%
Homemaker	1,497

### Retired

Of those who responded as being **retired**, it is estimated that 1,871 are willing to accept employment and will accept only with the right opportunity. The following table further segments the overall Monroe County ALM into age, gender, and education areas.

#### Age and Gender

The mean or average age of this group is 59 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

Forty percent of the **retired** respondents in the ALM have post-high school education with 14.5 percent possessing four-year degrees or higher. In comparing retirees to the other subsets shows the retirees have a lower level of education with 40.0 percent having some college compared to the **total available workforce** at 76.5 percent. This group represents pool of experienced workers but also higher opportunity costs to get them back in the labor market.

Twenty percent (20.0%) 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. Eleven percent of the **retired** subset have experience in the Goods Producing sector.

### Retired Workforce Characteristics

Retired Workforce Characteristics	
Retired	1,871
Commute One Way	24.1
Desired Average Wage	\$18.00
Average Age	58.8
Male/Female Ratio	54.3/45.7
Household Income	\$34,513

### Retired Education Attainment

Retired Education Attainment	
Less than high school	0.0%
High school or equivalent	60.0%
Some college or associate's degree	25.5%
Bachelor's degree	10.4%
Advanced degree	4.1%
Retired	1,871

# 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, along with health care, retirement, and flexible hours. On-the-job experience, training, and education rated higher for the **non-worker available**. Salary and wages rated higher for the **worker available** than the **non-worker available** while a job closer to home and flexible hours rated higher for the **non-worker available**.

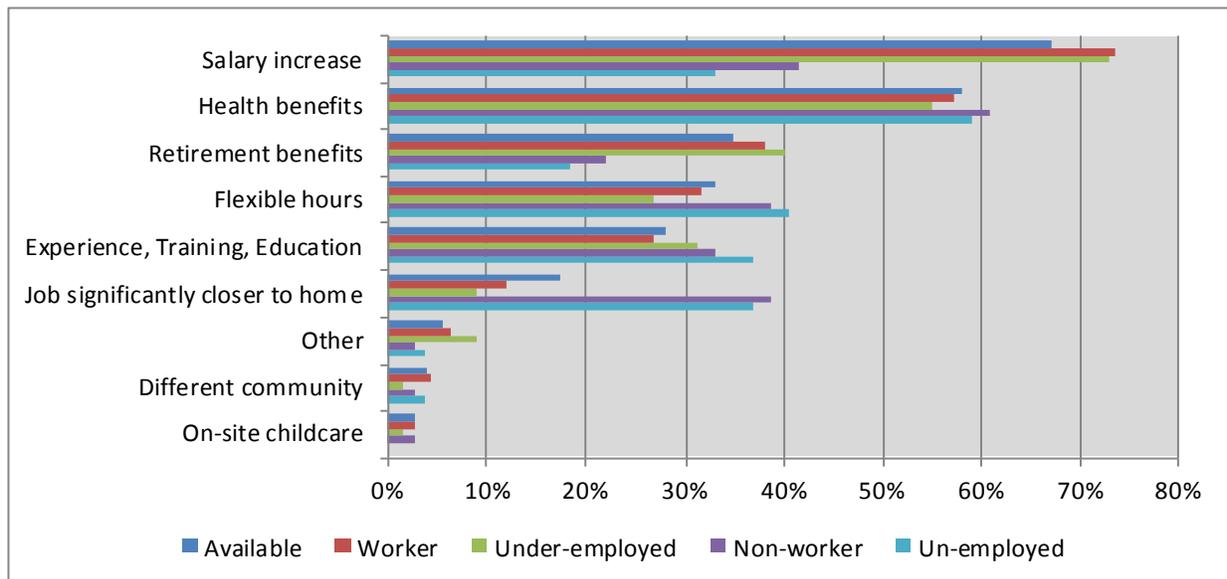
**Desired Benefits by Group**

Category	Available	Worker	Under-employed	Non-worker	Un-employed
Health benefits	58.2%	57.4%	55.2%	61.1%	59.3%
Experience, Training, Education	28.2%	27.0%	31.3%	33.3%	37.0%
Salary increase	67.2%	73.8%	73.1%	41.7%	33.3%
Retirement benefits	35.0%	38.3%	40.3%	22.2%	18.5%
On-site childcare	2.8%	2.8%	1.5%	2.8%	0.0%
Flexible hours	33.3%	31.9%	26.9%	38.9%	40.7%
Different community	4.0%	4.3%	1.5%	2.8%	3.7%
Job significantly closer to home	17.5%	12.1%	9.0%	38.9%	37.0%
Other	5.6%	6.4%	9.0%	2.8%	3.7%

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. Twenty-two percent of the **total available workforce** would be interested in employment with a wage of up to \$12.99 per hour. It is estimated that 37,817 people or 57.1 percent of the **total available workforce** would be interested in a new or different employment with a wage of up to \$20.00. Eleven 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
4.2%	11.4%	2.4%	4.2%
\$13.00 - \$13.99	\$14.00 - \$15.99	\$16.00 - \$17.99	\$18.00 - \$19.99
2.4%	13.3%	7.2%	9.0%
\$20.00 - \$21.99	\$22.00 - \$24.99	\$25.00 - \$27.99	\$28.00 - \$30.99
14.5%	3.0%	9.0%	8.4%
\$31.00 - \$33.99	\$34.00 - \$36.99	\$37.00 - \$39.99	\$40.00 or More
0.6%	1.8%	0.6%	7.8%

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						
\$9.99 or Less	2,793	4.2%	1,998	3.8%	792	5.9%	392	1.6%
\$10.00 - \$14.99	14,762	22.3%	7,994	15.2%	6,735	50.0%	3,917	15.6%
\$15.00 - \$19.99	18,353	27.7%	14,789	28.0%	3,566	26.5%	7,443	29.7%
\$20.00 - \$24.99	11,570	17.5%	10,792	20.5%	792	5.9%	5,484	21.9%
\$25.00 - \$29.99	7,581	11.4%	7,194	13.6%	396	2.9%	3,525	14.1%
\$30.00 - \$34.99	3,990	6.0%	2,798	5.3%	1,189	8.8%	1,567	6.3%
Over \$35.00	7,182	10.8%	7,194	13.6%	0	0.0%	2,742	10.9%
Total:	66,230	100.0%	52,759	100.0%	13,470	100.0%	25,070	100.0%

## Desired Wage Rate By Industry and Occupation

The Goods Producing industry sector has the lowest desired wage of \$21.41 with the Service Providing industry sector highest at \$23.20. The management occupation group has the highest desired wage at \$37.66 and those currently non-working have the lowest at \$14.47.

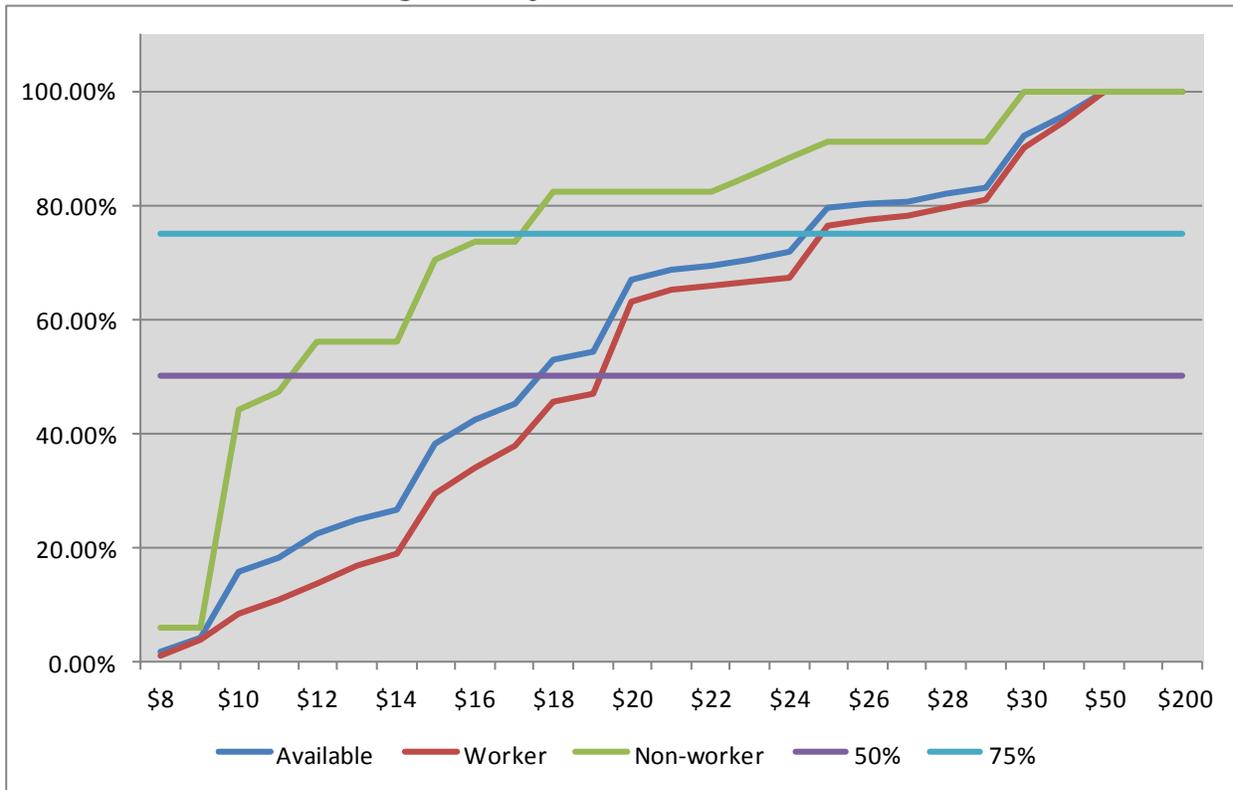
### Desired Wage Rate by Industry

Category	
Goods Producing	\$21.41
Service Providing	\$23.20
Government / Education	\$22.07

### Desired Wage Rate by Occupation

Management	\$37.66
Production/Repair/Installation	\$19.63
Professional/Technical	\$29.34
Services	\$19.11
Non-Working Available	\$14.47

### 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 **total available** would be satisfied with \$17.50 an hour or less and about 75 percent of the **total available** would be satisfied with \$25.50 an hour or less. To reach 50 percent of the worker available would require \$19.50 an hour or less and \$26.00 an hour or less for 75 percent.

## 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 Management occupation cluster indicates a lower desired wage of \$37.66 compared to an actual of \$38.66. The Professional/Technical cluster has a higher desired wage of \$29.34 compared to the actual wage of \$23.30.

The Professionals: Doctors, Lawyers, Engineers, etc. occupation group has an actual average wage of \$28.91 with an average desired wage of \$34.80. 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
<b>Management</b>	<b>4,625</b>	<b>\$38.66</b>	<b>\$37.66</b>
Managerial, Executive, Business Owners, Farmers, Supervisory	4,625	\$38.66	\$37.66
<b>Production/Repair/Installation</b>	<b>5,388</b>	<b>\$18.48</b>	<b>\$19.63</b>
Maintenance, Installations, and Repairs, etc.	1,361	\$18.65	\$21.20
Production: Factory Assembly, Fabrication, Construction, and Mining	4,027	\$18.43	\$19.10
<b>Professional/Technical</b>	<b>12,929</b>	<b>\$23.30</b>	<b>\$29.34</b>
Business Sales: Finance, Insurance, Real Estate, Wholesale, Industrial, etc.	4,833	\$26.29	\$31.15
Professionals: Doctors, Lawyers, Engineers, Accountants, Professors, etc.	2,014	\$28.91	\$34.80
Computer Technology, Science, Math, and Engineering (STEM)	2,916	\$24.30	\$28.57
Protective: Police/Fire/Military/Regulators/Investigators and Postal	250	\$15.19	\$16.50
Teachers, Instructors, Trainers, Writers, Researchers, etc.	2,916	\$17.35	\$23.80
<b>Services</b>	<b>29,817</b>	<b>\$17.90</b>	<b>\$19.11</b>
Administrative Support: Shipping/Receiving, Secretaries, Computer Operators, etc.	5,847	\$17.25	\$19.34
Business Office and Clerical Operations	4,027	\$17.01	\$20.00
Consumer Services, Retail, Restaurant, Hotel, Food Services, etc.	5,541	\$10.90	\$14.56
Delivery/Drivers/Couriers	1,208	\$18.19	\$21.00
Government Office and Clerical Operations	1,111	\$24.39	\$28.20
Health, Social, Community, Personal Care, and Recreation Services	6,041	\$18.61	\$19.40
Other Blue Collar: Laborers, Farm Hand, Janitor, Warehouse Workers, etc.	4,027	\$17.58	\$19.56
Other White Collar Workers	2,014	\$19.14	\$21.20
<b>Non-Worker Available</b>	<b>13,740</b>	<b>N/A</b>	<b>\$14.47</b>
Homemaker	10,103	N/A	\$14.62
Retired	1,497	N/A	\$11.62
Unemployed	1,871	N/A	\$18.00

Adjustments have been made to reflect anomalies in the survey data

The management group is the only occupation group with lower desired wages. The lower expectations of non-worker for desired wages of \$14.47 is particularly noteworthy compared to those available and employed.

## Commuting Patterns and Preferences

The preferred commute of the **worker available workforce** in the Monroe County ALM is 23.9 minutes/miles or less one way. The overall commute preference of the **total available workforce** is 23.1 minutes/miles one way. The **total available workforce** indicates it is open to commuting for the right employment opportunity. The table shows 58,237 people or 88.0 percent of the **total available workforce** would commute more than 10 minutes/miles, one way, for work. It also shows that 13,464 people or 20.3 percent of the **total available workforce** are willing to travel more than 30 minutes/miles and 3,045 people 4.6 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 in time and distance 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 further for 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 22 to 25 minutes/miles one way to work compared to those who are **non-worker** of 12 to 21 minutes/miles. The three groups in the non-working group show a considerable difference in that **unemployed** are willing to travel more and are more open in their employment options than either the **homemakers** or the **retired**. The non-working **homemaker** and **retirees** want shorter commutes and 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 12.5 minutes/miles one way. In general, **retired** people are not as willing to commute long distances to work; however, those in the Monroe County ALM are willing to travel 19.1 minutes/miles one way for employment opportunities.

Sixty-eight percent of the resident available workforce works within Monroe County and 32.0 percent commute to work outside the county. The **seeking different employment** subset has the highest percentage of those

working outside of Monroe County at 55.6 percent with 3.7 percent working inside of GAAR. Those commuting into GAAR for employment would require another methodology.

#### Preferred Distance/Travel Time

Distance/Travel Time	Count
Less than 10 miles	7,993
10 - 30 miles	43,773
31 - 50 miles	11,419
51+ miles	3,045
Total Available Workforce	66,230

#### Available Workforce Group Preferred Distance/Travel Time

Available Workforce Group	Preferred Distance/Travel Time
Total Available Workforce	23.1
Worker Available Workforce	23.9
Underemployed	25.6
Seeking Different Employment	22.7
Willing To Change	22.1
Non-Worker Available Workforce	20.4
Unemployed	20.9
Homemaker	12.5
Retired	24.1

#### Outgoing Workers

	Overall	Work outside GAAR	Work outside Monroe, inside GAAR	Work inside of Monroe
Worker Available	52,759	24.8%	7.1%	68.1%
Underemployed	25,070	22.4%	9.0%	68.7%
Seeking Different Employment	10,103	51.9%	3.7%	44.4%
Willing to Change	17,586	12.8%	6.4%	80.9%

## 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 many 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 Monroe County showed interest in People with 35.9 percent, Data with 10.2 percent, and Things with 9.0 percent. Forty-five 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	25.7
Production/Repair/Installation	24.6
Professional/Technical	25.9
Services	22.8
Non-Working Available Workforce	20.4
Overall Average	23.1

### Commuting by Industry Type

	Minutes/ Miles
Goods Producing	23.6
Government/Education	28.4
Service Providing	22.4

### Willing To Change Primary Occupation

	Available Workforce	Willing To Change	Percent
Worker Available	52,759	46,260	87.7%
Underemployed	25,070	23,111	92.2%
Seeking Different Employment	10,103	8,980	88.9%
Willing To Change	17,586	14,218	80.9%
Non-Worker Available	13,470	11,225	83.3%
Unemployed	10,103	8,606	85.2%
Homemaker	1,497	1,497	100.0%
Retired	1,871	1,123	60.0%

### Willing To Change Primary Industry Group

	Available Workforce	Willing To Change	Percent
Worker Available	52,759	47,753	90.5%
Underemployed	25,070	23,080	92.1%
Seeking Different Employment	10,103	10,103	100.0%
Willing To Change	17,586	14,593	83.0%
Non-Worker Available	13,470	10,851	80.6%
Unemployed	10,103	8,606	85.2%
Homemaker	1,497	1,123	75.0%
Retired	1,871	1,123	60.0%

## Conclusion

This study assesses the supply side of labor and provides information for the Monroe County 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 with adequate data to make objective decisions is available at the local and regional level. 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 workers all having a major stake in developing skills and enhancing productivity 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 of 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 force of an area, from age 16 and older even though much of that labor has no interest in changing jobs. The 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.