

**THE
EAST CENTRAL INDIANA
EASTERN SECTOR
AREA
LABOR AVAILABILITY REPORT**

July, 2008

**Compiled and Prepared by
THE PATHFINDERS**



Dallas, Texas

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INTRODUCTION

The Pathfinders has employed its experience in workforce assessments for corporate site-selection clients and civilian workforce assessments for the Department of Defense in locations that faced military base closures to produce this evaluation of the East Central Indiana Eastern Sector area workforce. The information presented in this report has been developed independently of the client, and the client has not influenced the findings.

The Pathfinders functions as a site-selection consultant to many of America's largest corporations, including companies such as AT&T, DuPont, Celanese, 3M Corporation, IMC Global, Singapore Aerospace, AIG, UPS, and Lockheed Martin. The question that most often drives the search for a new business location is whether the candidate location has the workforce needed, and a workforce analysis has been a key component of the site searches conducted for these clients. Senior human resources executives from among corporate clients assisted in refining this methodology and report format. Companies making location decisions based upon these surveys have reported that when staffing actually began, the numbers reported by The Pathfinders proved to be accurate.

In a poll of its corporate clients, The Pathfinders found that those clients' experiences suggest that new hires for new operations typically do not come from the ranks of the unemployed. Instead, these clients and other companies staff a new operation principally with individuals who are working but who desire better jobs and who appear to possess the skills, education, and experience to qualify them for those better jobs. By that definition, those individuals can be considered "underemployed" and are identified as such in this report. The type of quality employer that the East Central Indiana Eastern Sector region is attempting to attract will typically hire people who come from this group. As a consequence, The Pathfinders was retained to quantify the extent to which underemployment exists in the area, as well as to document the cost, skills, experience, and education of that hidden workforce. This report represents the objective and professional view of The Pathfinders with regard to workforce availability, cost, skills, and quality that a new employer can expect in the East Central Indiana Eastern Sector region.



SUMMARY OF FINDINGS

- The East Central Indiana Eastern Sector area, referred to in this report as the “labor shed”, has a household population of approximately 199,200 and a civilian labor force of approximately 102,800.
- The labor shed has a pool of approximately 6,400 unemployed persons who are actively seeking work.
- A new employer will be able to attract employees from an additional pool of about 16,600 workers. These individuals are currently employed and have indicated an interest in changing jobs.
- These potentially available workers are referred to in this report as the “underemployed” because they appear to possess the skills, experience, and education to qualify them for the pay rates at which they would take a new job.
- The desired pay rates of these underemployed workers are reasonable when compared to their existing pay rates. The median current pay rate of the underemployed workers is \$14.90 per hour, and the median desired pay rate of the underemployed workers is \$15.99 per hour.
- About 25% of the underemployed workers would take a new job for \$12.46 per hour or less. At the upper end, the 25% most qualified and experienced will command more than \$20.67 per hour.
- Roughly 1,500 people, neither employed nor seeking work, might re-enter the workforce for the proper job.
- In total, the East Central Indiana Eastern Sector area has approximately 24,500 available workers for new or expanding businesses.



METHODOLOGY

Published government statistics report wages and employment for the entire workforce of an area, even though most of that workforce has no interest in changing jobs. This report, prepared by The Pathfinders, includes data on those people in the area who desire to change jobs and who would be potential candidate workers for a new employer. As opposed to average wages, this report quantifies the number of those workers available for an employer in various wage ranges. Also included as potential workers are the unemployed who are actively seeking work and that segment of individuals who might consider re-entering the workforce for a good job.

The first step in assessing the workforce of the East Central Indiana Eastern Sector area was to determine the boundaries of the area to be assessed. To accomplish this task, The Pathfinders applied the same reasoning that would be used during a site search for a corporate client considering the area as a potential location. The East Central Indiana Eastern Sector survey area includes those locations from which workers might be drawn to a new employer and is referred to in this report as the “labor shed”. This labor shed consists of Fayette, Henry, Jay, Randolph, Rush and Wayne Counties in Indiana.

Once the labor shed was identified, a random sample of telephone numbers of qualified respondents in the labor shed was obtained for use in the Computer Assisted Telephone Interviewing or CATI system.

The Pathfinders then conducted telephone interviews with individuals throughout the East Central Indiana Eastern Sector region. Those individuals were proportionally stratified across age, household income, and zip codes. The purpose of these interviews was to ascertain availability for work with a new employer; determine desired pay rates; and, collect information on such factors as age, education, commuting patterns, experience, and skills. The data obtained as a result of those interviews enabled The Pathfinders to apply and employ a proprietary methodology that accurately determined the existence of underemployment as defined in the introduction.



The Pathfinders applied a proprietary process to the analysis of the data to correct for invalid responses. For example, those persons indicating they would take a new job but also indicating the desire for increased or decreased pay that is unreasonable are not counted in the results.

This 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.

Current pay alone is not the qualifying factor for underemployment status in this study. Individuals, for example, making \$7.50 per hour, possessing no high school degree or skills, and being in the workforce for less than one year may consider themselves to be underemployed but are not considered to be so in this report. On the other hand, education, skills, and experience may qualify the person making \$22.00 per hour as truly underemployed.

Sufficient interviews were completed with qualified individuals to produce results for that entire population group which vary by no more than plus or minus 5 percentage points. If the survey were repeated 100 times, 95 times out of 100 the results would be the same as those resulting from a survey of every individual in the entire population.

Irrespective of the fact that the methodology employed is scientifically proven to produce such results, it is perhaps even more important to note that companies making location decisions based upon these surveys have reported that when staffing actually began, the numbers reported by The Pathfinders proved to be accurate.

ASSESSMENT OF THE WORKFORCE

The East Central Indiana Eastern Sector area labor shed has a household population of approximately 199,200. The civilian labor force numbers approximately 102,800, and the labor shed contains approximately 6,400 unemployed people who are actively seeking work.

The results of this assessment determined that approximately 16,600 workers can be defined as underemployed: those individuals who are currently working but would take a better job if offered by a new or existing employer and who appear to possess the skills, education, and experience to qualify them to do so. Further, the results suggest that an additional 1,500 people who are not currently employed or actively seeking work would consider re-entering the workforce. In total, the East Central Indiana Eastern Sector area has approximately 24,500 available workers for new or existing employers.

AVAILABLE WORKERS

Number of underemployed workers	16,600
Number of unemployed persons who are actively seeking work	6,400
Number of persons who are not working, but would consider re-entering the workforce	1,500
Total Number of Workers Available for Employers	24,500

The reader is cautioned that, while the number of underemployed workers identified in the region, as well as their skills, experience, education, and costs, is 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.



These underemployed workers might also be termed “upgraders”. They desire to move into an upgraded job and appear to possess the skills, education, and experience to enable them to do so. The pay rates they expect to achieve range from under \$8.00 to over \$25.00 per hour.

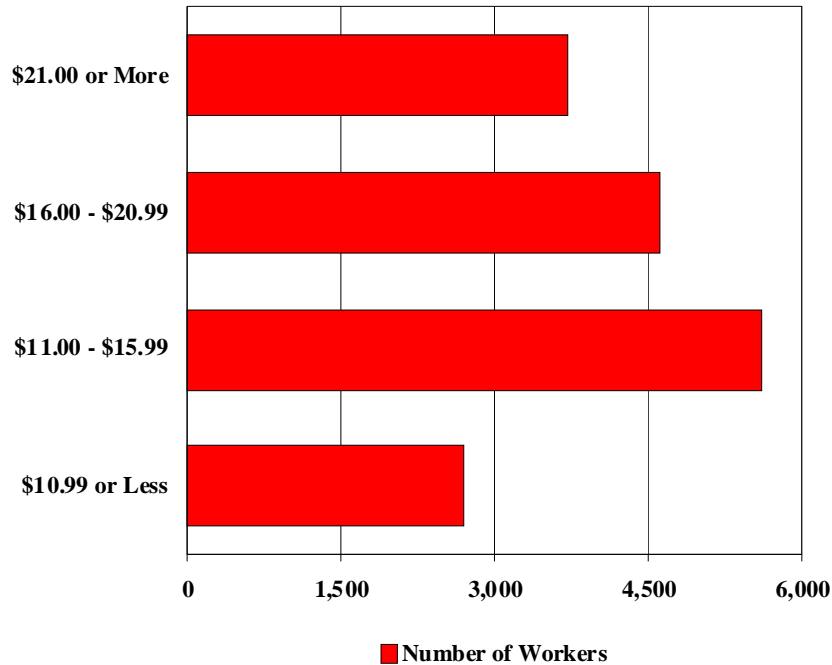
The following data represent the desired pay rates of the underemployed individuals in the labor shed. Many workers expressed their wage requirements in weekly, monthly, or annual terms, but all wage figures in this report are presented in hourly rates. Selected conversions may add perspective to the hourly rates. Figures presented below are rounded and based on a 40-hour workweek.

CONVERSION CHART

Hourly	Weekly	Monthly	Annually
\$ 8.00	\$ 320.00	\$ 1,387.00	\$ 16,640.00
\$ 10.00	\$ 400.00	\$ 1,733.00	\$ 20,800.00
\$ 12.00	\$ 480.00	\$ 2,080.00	\$ 24,960.00
\$ 14.00	\$ 560.00	\$ 2,427.00	\$ 29,120.00
\$ 16.00	\$ 640.00	\$ 2,773.00	\$ 33,280.00
\$ 18.00	\$ 720.00	\$ 3,120.00	\$ 37,440.00
\$ 20.00	\$ 800.00	\$ 3,467.00	\$ 41,600.00
\$ 22.00	\$ 880.00	\$ 3,813.00	\$ 45,760.00
\$ 24.00	\$ 960.00	\$ 4,160.00	\$ 49,920.00
\$ 26.00	\$ 1,040.00	\$ 4,507.00	\$ 54,080.00
\$ 28.00	\$ 1,120.00	\$ 4,853.00	\$ 58,240.00
\$ 30.00	\$ 1,200.00	\$ 5,200.00	\$ 62,400.00



DESIRED WAGE RATES PER HOUR BY RANGE
16,600 Underemployed Workers



NUMBER OF UNDEREMPLOYED WORKERS AVAILABLE
AT SPECIFIC WAGE RATES PER HOUR (rounded)

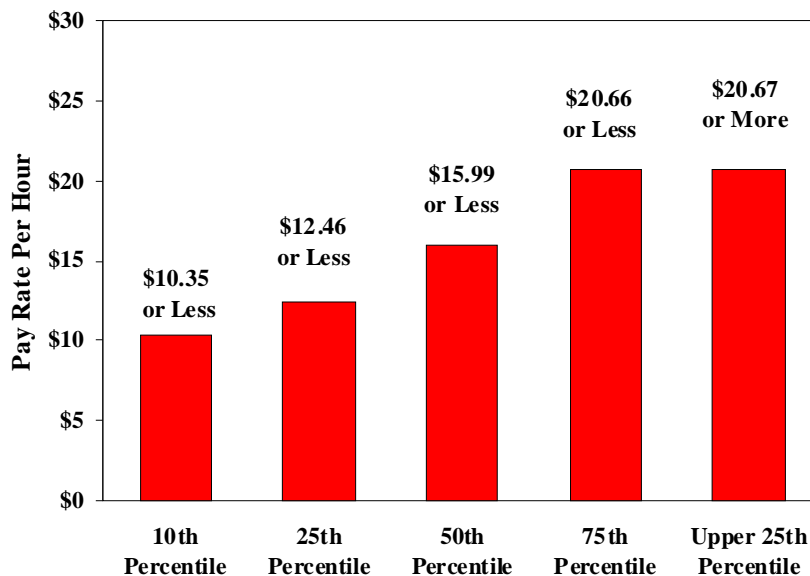
<u>\$7.99 or Less</u> 200	<u>\$8.00 - \$8.99</u> 300	<u>\$9.00 - \$9.99</u> 600	<u>\$10.00 - \$10.99</u> 1,600	<u>\$11.00 - \$11.99</u> 500
<u>\$12.00 - \$12.99</u> 2,100	<u>\$13.00 - \$13.99</u> 600	<u>\$14.00 - \$14.99</u> 1,100	<u>\$15.00 - \$15.99</u> 1,300	<u>\$16.00 - \$16.99</u> 1,000
<u>\$17.00 - \$17.99</u> 200	<u>\$18.00 - \$18.99</u> 1,900	<u>\$19.00 - \$19.99</u> 200	<u>\$20.00 - \$20.99</u> 1,300	<u>\$21.00 - \$21.99</u> 500
<u>\$22.00 - \$22.99</u> 500	<u>\$23.00 - \$23.99</u> 100	<u>\$24.00 - \$24.99</u> 200	<u>\$25.00 - \$25.99</u> 500	<u>\$26.00 or More</u> 1,900



Utilizing the desired wage information as illustrated in the preceding charts, the following conclusions can be drawn concerning the underemployed workers in the East Central Indiana Eastern Sector area:

- 10% of the underemployed workers will require \$10.35 per hour or less to change jobs.
- 25% of the underemployed workers will require \$12.46 per hour or less to change jobs.
- 50% of the underemployed workers will require \$15.99 per hour or less to change jobs.
- 75% of the underemployed workers will require \$20.66 per hour or less to change jobs.
- The upper 25% of the underemployed workers will require wages beginning at \$20.67 per hour and extending upward to over \$25.00 per hour. These are the most qualified and experienced workers.

DESIRED WAGE RATES BY PERCENTILE

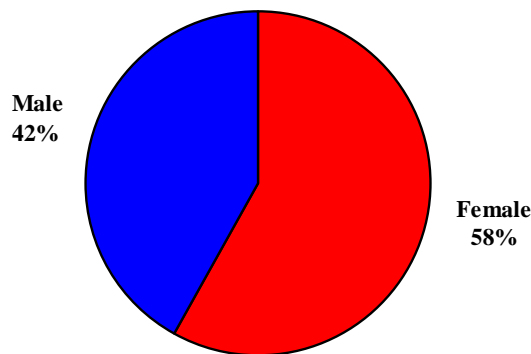


CHARACTERISTICS OF UNDEREMPLOYED WORKERS

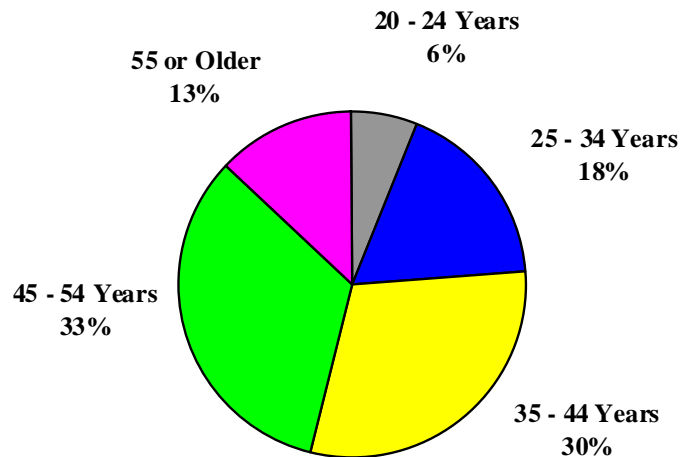
The East Central Indiana Eastern Sector Area Labor Shed

The following charts provide information on various characteristics of the underemployed workers in the labor shed. As these data relate solely to those individuals in the labor shed who are underemployed, they will vary from data representative of the population as a whole.

UNDEREMPLOYED WORKERS - GENDER

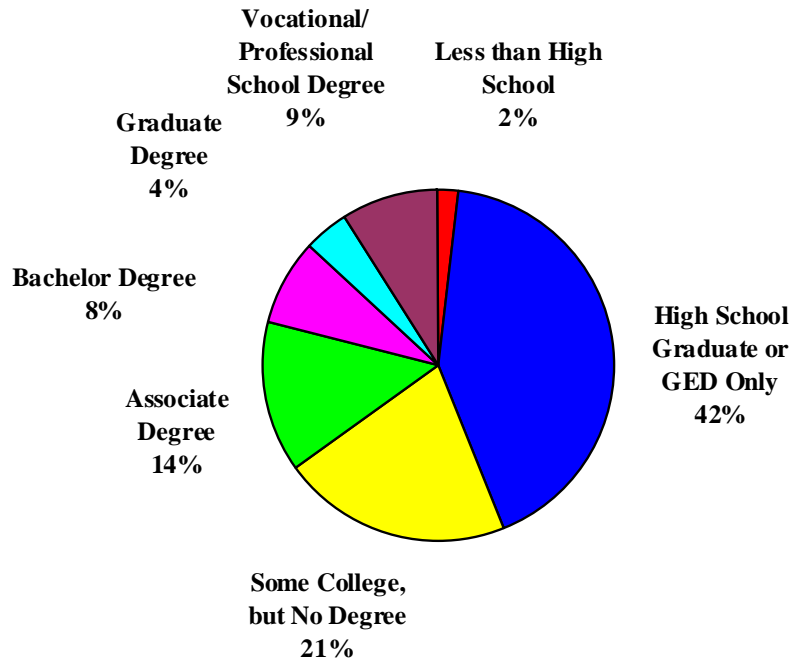


UNDEREMPLOYED WORKERS - AGE



CHARACTERISTICS OF UNDEREMPLOYED WORKERS

EDUCATION

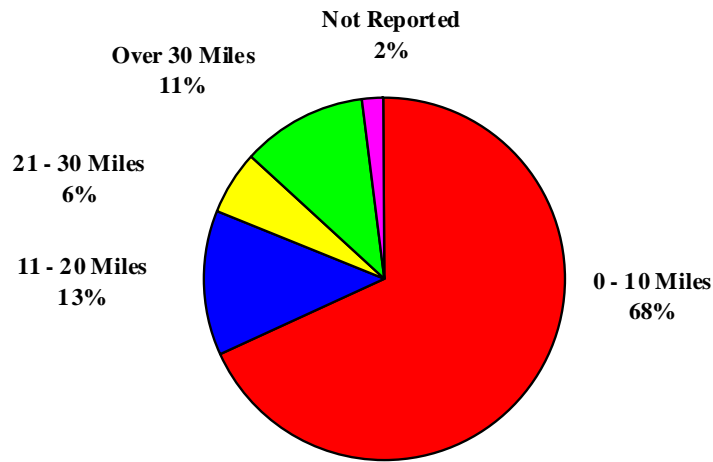


LENGTH OF TIME IN CURRENT JOB

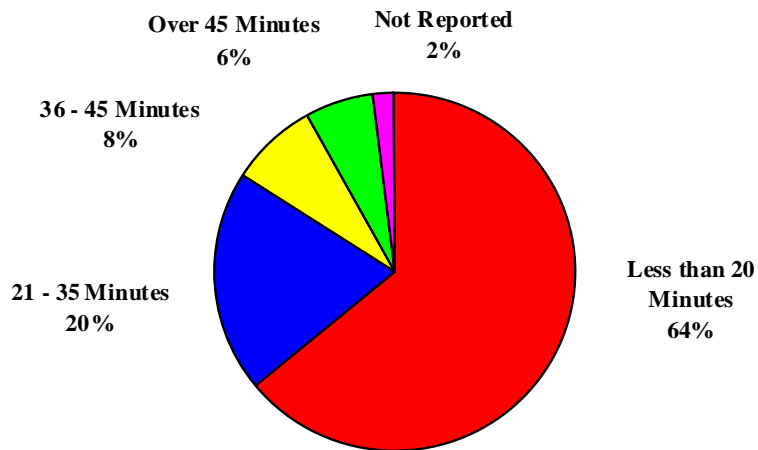


CHARACTERISTICS OF UNDEREMPLOYED WORKERS

CURRENT COMMUTE DISTANCE



CURRENT COMMUTE TIME



EXPERIENCE AND SKILLS – UNDEREMPLOYED WORKERS

The East Central Indiana Eastern Sector Area Labor Shed

The experience and skills categories used in this report are designed to provide accurate workforce data for employers which fall into one or more of the following four broad groups:

- manufacturing, assembly, fabrication or other industrial operations;
- back office, data processing, call centers, information technology, customer service or sales operations;
- distribution or transportation operations; and,
- biotechnology, pharmaceuticals or medical research operations.

The experience and skills categories are purposefully similar in order to present the most accurate worker availability for operations in one of those four groups.

An employee in the front office of a manufacturing operation will be considered to have “manufacturing” experience but may only have “office” skills. Someone with “manufacturing” experience may not have “manufacturing” skills, but could have “materials handling” skills if they work in shipping or receiving. “Sales and customer service” experience crosses many other experience and skills categories and ideally would be possessed by anyone with customer contact to any degree.

The similarities between the skills and experience categories are designed to ensure inclusiveness considering the multitude of tasks and job titles present in most business, government and institutional operations. Additionally, what may appear to some observers as redundancy is, in reality, a proven mechanism to cross-check the validity of responses and to identify the degree to which workplace and professional competencies are truly transferable to new positions and employers.



EMPLOYMENT EXPERIENCE OF UNDEREMPLOYED WORKERS**The East Central Indiana Eastern Sector Area Labor Shed****16,600 Underemployed Workers**

Experience Category*	Total Number of Persons Experienced**	Percentage of Total Underemployed	Average Number of Years of Experience
Customer Service	11,500	69%	10
Office Operations	8,600	52%	11
Manufacturing/Assembly/Fabrication	8,600	52%	9
Sales	8,300	50%	9
Warehouse/Distribution/Transportation	7,300	44%	7
Maintenance/Installation/Repair	5,800	35%	9
Information Technology	4,300	26%	6
Call Center	4,200	25%	6
Medical/Health Sciences	4,000	24%	6
Telecommunications	3,500	21%	6

* Individuals polled may have experience in more than one job classification.

** Rounded



EMPLOYMENT SKILLS OF UNDEREMPLOYED WORKERS**The East Central Indiana Eastern Sector Area Labor Shed****16,600 Underemployed Workers**

Skills*	Total Number of Persons Skilled**	Percentage of Total Underemployed
Warehouse/Materials Handling	9,100	55%
Manufacturing/Assembly/Fabrication	9,100	55%
Office Operations	9,000	54%
Technician/Quality Assurance	6,000	36%
Maintenance/Installation/Repair	5,600	34%
Medical/Health Sciences	5,500	33%
Information Technology	4,800	29%
Telecommunications	4,300	26%
Electronics/Engineering	3,800	23%

* Individuals polled may have skills in more than one job classification.

** Rounded



FACTORS AFFECTING JOB DESIRABILITY
THE EAST CENTRAL INDIANA EASTERN SECTOR
AREA LABOR SHED
16,600 UNDEREMPLOYED WORKERS

In an effort to identify those factors most important to the East Central Indiana Eastern Sector area's underemployed workers relative to consideration of an employer's desirability, the surveyed individuals were asked to rate the following job factors on a scale of 1 to 5, with 5 being "extremely important" and 1 being "not important". The table below presents the ratings for each factor.

Factor	5 Extremely Important	4 Very Important	3 Important	2 Somewhat Important	1 Not Important
Salary	58%	28%	12%	1%	1%
Location	37%	21%	33%	7%	2%
Insurance Benefits	64%	21%	12%	1%	2%
Retirement Benefits	56%	31%	7%	5%	1%
Physical Working Environment	43%	25%	27%	3%	2%
Paid Training Programs	28%	32%	24%	8%	8%
Flexible Work Schedule	28%	25%	30%	12%	5%
Opportunity for Advancement	42%	26%	20%	10%	2%
Financial Stability of the Company	62%	24%	12%	1%	1%
Reputation of the Company	47%	28%	22%	2%	1%



In the table below, the factors are presented in order by “extremely important”. Bear in mind that the scores should be viewed in relation to each other. In other words, respondents ranked opportunity for advancement as more “extremely important” as a job factor than paid training programs, although such a ranking does not mean that workers in the East Central Indiana Eastern Sector area consider paid training programs to be unimportant in their evaluation of new job opportunities.

Factor	Extremely Important
Insurance Benefits	64%
Financial Stability of the Company	62%
Salary	58%
Retirement Benefits	56%
Reputation of the Company	47%
Physical Working Environment	43%
Opportunity for Advancement	42%
Location	37%
Flexible Work Schedule	28%
Paid Training Programs	28%



EMPLOYERS' VIEWS OF THE THE EAST CENTRAL INDIANA AREA TOTAL WORKFORCE

In developing a profile of existing workers in the East Central Indiana region, The Pathfinders considered such factors as labor availability, productivity, unionization, attitudes, costs, and education. The analysis was based upon interviews conducted with senior management and human resources professionals from companies located in the labor shed. Each of these companies operated in the industrial, commercial, or service sectors. The interview sampling was sufficiently large to make valid workforce judgments.

As determined from the employer interviews, the table below reflects various methods used to recruit workers in the East Central Indiana region and the percent of employers utilizing that method. Many use more than one method, therefore, the percentages will not add up to 100%.

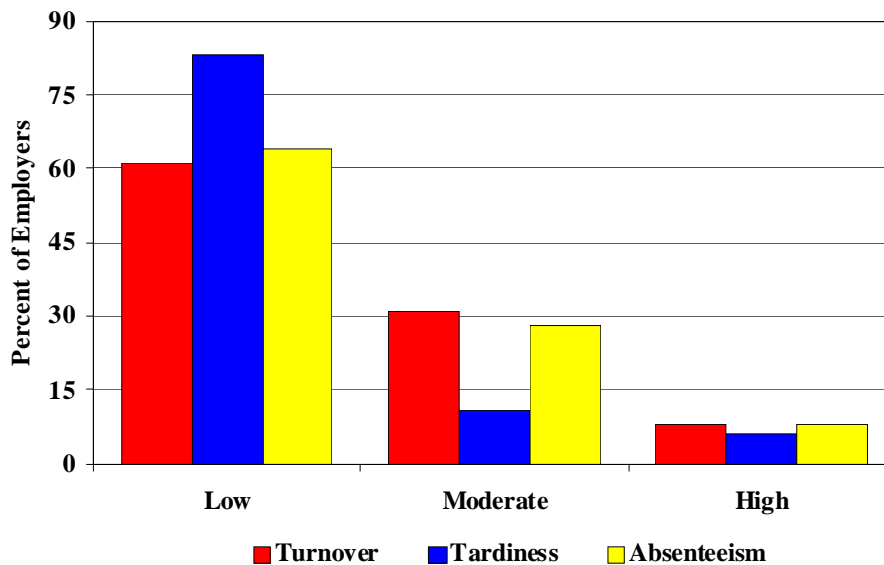
Recruiting Method	% of Employers
Newspaper Ads	56%
Word of Mouth	50%
Internet	42%
Staffing/Temp Service	19%
State Agency	19%
Job Fair	19%
Colleges/Tech Schools	17%
Recruiters	14%
Radio/TV	6%



Employers with operations in other regions of the United States were asked to compare their experiences in those other areas with their experiences in the East Central Indiana region. Of those employers who had operations elsewhere, 90% stated that their East Central Indiana area operations were comparable to or better than the operations in other locations in terms of profitability and production. This is indicative not only of good management but also of a productive workforce.

Based upon the experience of The Pathfinders in evaluating labor forces in numerous locations, a definite correlation between productivity, absenteeism, tardiness, turnover, and substance abuse appears to exist. That correlation goes beyond the fact that an absent worker is obviously unproductive. Rather, those factors are indicative of an employee’s attitude toward the job. The chart below shows the percent of employers rating for turnover, tardiness and absenteeism in the East Central Indiana region.

**PERCENT OF EMPLOYERS RATING
THE EAST CENTRAL INDIANA AREA TOTAL WORKFORCE**



Additionally, in the East Central Indiana region, 81% of the employers interviewed stated their companies tested for substance abuse, primarily pre-employment. Substance abuse within the individual companies’ workforces was reported as low.



In consideration of all factors, 83% of the employers in the East Central Indiana area rated the productivity of the workforce as “Good” to “Excellent”. Worker reliability received high marks from 88% of the employers.

**PERCENT OF EMPLOYERS RATING
THE EAST CENTRAL INDIANA AREA TOTAL WORKFORCE**

Category	Excellent	Good	Fair	Poor
Worker Productivity	19%	64%	17%	0%
Worker Reliability	19%	69%	6%	6%
Worker Attitudes	11%	69%	17%	3%

The educational competencies of employees are additional factors used to evaluate an area’s labor force. In the East Central Indiana area, 74% of the employers interviewed rated the local public schools as “Excellent” or “Good”, and 91% of the employers rated the local community colleges and technical schools as “Excellent” or “Good”. Employers gave the following ratings to their employees relative to competency in reading, writing, and calculations.

**PERCENT OF EMPLOYERS RATING
THE EAST CENTRAL INDIANA AREA TOTAL WORKFORCE**

Category	Excellent	Good	Fair	Poor
Reading Competency	31%	56%	13%	0%
Writing Competency	14%	57%	29%	0%
Calculations Competency	17%	42%	36%	5%

A common employer complaint relates to the shortage of skilled and technical workers. The availability of these workers in the East Central Indiana region must be viewed from the perspective of comparative availability when other areas of the state and nation are



considered. Skilled and technical workers are in great demand and difficult to find in the vast majority of locations. Of the companies in the labor shed interviewed, 52% considered skilled worker availability to be “Excellent” or “Good”, while 42% considered it to be “Fair”. The availability of technical workers in the labor shed was rated “Excellent” or “Good” by 35% of the interviewed companies and “Fair” by 39%.

The following table provides a composite portrait of employers’ experiences with and opinions of workers in the East Central Indiana region. Taken in context with the data gathered and presented in the workforce survey, a balanced profile of the attributes of individuals available to fill the labor needs of new and expanding firms is provided.

**PERCENT OF EMPLOYERS RATING
THE EAST CENTRAL INDIANA AREA TOTAL WORKFORCE**

Category	Excellent	Good	Fair	Poor
Availability of Skilled Workers	19%	33%	42%	6%
Availability of Unskilled Workers	37%	54%	9%	0%
Availability of Professional Workers	6%	31%	50%	13%
Availability of Technical Workers	9%	26%	39%	26%
Worker Productivity	19%	64%	17%	0%
Worker Reliability	19%	69%	6%	6%
Worker Attitudes	11%	69%	17%	3%
Reading Competency	31%	56%	13%	0%
Writing Competency	14%	57%	29%	0%
Calculations Competency	17%	42%	36%	5%
Teamwork Skills	17%	64%	19%	0%
Entry Level Skills	17%	69%	11%	3%



COMPARISONS OF EMPLOYERS RATINGS TOTAL WORKFORCE

The East Central Indiana Area Labor Shed / Locations Previously Surveyed

In the course of workforce surveys, local employers are asked to rate their workers on a number of factors. Those factors include: worker productivity; worker reliability and attitudes; reading/writing/calculations competency; teamwork skills; entry level skills; availability of skilled workers; availability of unskilled workers; availability of technical workers; and, availability of professional workers. Local employers are asked to rate each factor either “Excellent”, “Good”, “Fair”, or “Poor”.

The purpose of these interviews and ratings is not only to determine how local employers rate their workers but also to provide a means for comparing local ratings to those of all locations surveyed during the past eighteen months. Such comparison will enable you to assess your employers’ ratings of their workers in contrast to the body of thousands of employer ratings recorded in that period.

The following charts present the comparative results for each factor. They compare the percentages of the East Central Indiana area employers who rated their workers “Excellent”, “Good”, “Fair”, or “Poor” on each factor with the “Highest” rating of that factor in all areas surveyed in the last eighteen months and the “Median” rating for that factor in all areas surveyed during that time. As a result, the “Highest” and “Median” ratings do not add to 100%.

For example, 19% of the East Central Indiana area employers rated “Worker Productivity” as “Excellent”. Of all the locations surveyed during the last eighteen months, the “Median” for that rating is 21%, and the “Highest” rating recorded in the “Excellent” category is 50%. The same comparison applies for each of the other factors. In these charts, the East Central Indiana area is shown as “Labor Shed”.



WORKER PRODUCTIVITY

Excellent		Good		Fair		Poor	
Highest	50%	Highest	82%	Highest	41%	Highest	11%
Labor Shed	19%	Labor Shed	64%	Labor Shed	17%	Labor Shed	0%
Median	21%	Median	61%	Median	14%	Median	4%

WORKER RELIABILITY

Excellent		Good		Fair		Poor	
Highest	47%	Highest	80%	Highest	36%	Highest	14%
Labor Shed	19%	Labor Shed	69%	Labor Shed	6%	Labor Shed	6%
Median	23%	Median	57%	Median	14%	Median	6%

WORKER ATTITUDES

Excellent		Good		Fair		Poor	
Highest	45%	Highest	85%	Highest	40%	Highest	9%
Labor Shed	11%	Labor Shed	69%	Labor Shed	17%	Labor Shed	3%
Median	17%	Median	60%	Median	14%	Median	3%

WORKER READING COMPETENCY

Excellent		Good		Fair		Poor	
Highest	43%	Highest	76%	Highest	40%	Highest	17%
Labor Shed	31%	Labor Shed	56%	Labor Shed	13%	Labor Shed	0%
Median	16%	Median	55%	Median	26%	Median	5%



WORKER WRITING COMPETENCY

Excellent		Good		Fair		Poor	
Highest	27%	Highest	74%	Highest	69%	Highest	17%
Labor Shed	14%	Labor Shed	57%	Labor Shed	29%	Labor Shed	0%
Median	9%	Median	53%	Median	32%	Median	6%

WORKER CALCULATIONS COMPETENCY

Excellent		Good		Fair		Poor	
Highest	33%	Highest	72%	Highest	54%	Highest	29%
Labor Shed	17%	Labor Shed	42%	Labor Shed	36%	Labor Shed	5%
Median	7%	Median	53%	Median	29%	Median	7%

WORKER TEAMWORK SKILLS

Excellent		Good		Fair		Poor	
Highest	37%	Highest	86%	Highest	45%	Highest	7%
Labor Shed	17%	Labor Shed	64%	Labor Shed	19%	Labor Shed	0%
Median	15%	Median	67%	Median	17%	Median	3%

WORKER ENTRY LEVEL SKILLS

Excellent		Good		Fair		Poor	
Highest	28%	Highest	67%	Highest	53%	Highest	22%
Labor Shed	17%	Labor Shed	69%	Labor Shed	11%	Labor Shed	3%
Median	6%	Median	52%	Median	41%	Median	5%



AVAILABILITY OF SKILLED WORKERS

Excellent		Good		Fair		Poor	
Highest	25%	Highest	85%	Highest	71%	Highest	38%
Labor Shed	19%	Labor Shed	33%	Labor Shed	42%	Labor Shed	6%
Median	6%	Median	38%	Median	36%	Median	21%

AVAILABILITY OF UNSKILLED WORKERS

Excellent		Good		Fair		Poor	
Highest	40%	Highest	75%	Highest	50%	Highest	17%
Labor Shed	37%	Labor Shed	54%	Labor Shed	9%	Labor Shed	0%
Median	19%	Median	51%	Median	24%	Median	7%

AVAILABILITY OF PROFESSIONAL WORKERS

Excellent		Good		Fair		Poor	
Highest	30%	Highest	61%	Highest	63%	Highest	44%
Labor Shed	6%	Labor Shed	31%	Labor Shed	50%	Labor Shed	13%
Median	7%	Median	33%	Median	38%	Median	21%

AVAILABILITY OF TECHNICAL WORKERS

Excellent		Good		Fair		Poor	
Highest	27%	Highest	50%	Highest	70%	Highest	52%
Labor Shed	9%	Labor Shed	26%	Labor Shed	39%	Labor Shed	26%
Median	4%	Median	34%	Median	40%	Median	13%



NATIONAL COMPARATIVE OBSERVATIONS

As a matter of course in site-selection projects, The Pathfinders evaluates published government workforce statistics. Those statistics, however, depict the entire workforce while only a minority segment of those workers will be considered for or have an interest in new jobs with a company. The characteristics of the select, underemployed workforce group represented in this report may vary significantly from the workforce as a whole as reported in published government data.

Accordingly, the information presented in the workforce report for the East Central Indiana Eastern Sector region covers those members of the workforce who are, by virtue of their underemployment, potential candidates for new jobs. Existing employers, or new employers recruited to the East Central Indiana Eastern Sector region, typically will not depend heavily on the unemployed to staff a new operation or to fill vacancies in existing operations caused by turnover or expansions. Companies look to the ranks of people who are already employed but are seeking to better themselves. Those individuals in that category who appear to possess the education, skills, and experience to merit a better job are classified as underemployed.

The workforce report issued by The Pathfinders documents the availability of underemployed workers as well as the skills, experience, education, and costs of individuals in that hidden workforce in the East Central Indiana Eastern Sector region. This section of the report provides a comparison of the characteristics of the labor shed's underemployed workforce with the underemployed workforces in other communities previously surveyed throughout the nation. A prospect company considering the East Central Indiana Eastern Sector region as a location will judge its workforce on a comparative basis. This section of the report will allow local economic development professionals to view the region's workforce in relation to others across the country. The comparative data for other locations used in the following charts and tables reflect information accumulated over the past eighteen months. The Pathfinders maintains a continuing database of over 600 surveyed counties and communities and more than 30 million workers.



Locations Used In Comparative Analysis (Partial Listing)

In the various charts which follow this page, this labor shed is compared with others for the purpose of making the data meaningful. In the charts, figures for this labor shed are shown alongside the “lowest”, “median” and “highest” figures from other workforce surveys conducted by The Pathfinders. The comparisons are with communities and counties representing both larger and smaller and those similar in size to this labor shed. They are also scattered throughout the nation, and a partial listing of locations from which the “low”, “median” and “high” data reported are derived includes:

Albany, NY	Cullman County, AL	Laramie, WY	Rockford, IL
Albuquerque, NM	Culpeper County, VA	Larimer County, CO	Salem, IL
Allegany County, MD	Danville, IL	LaSalle, IL	San Marcus, TX
Amarillo, TX	Daytona Beach, FL	Lea County, NM	Scranton, PA
Anderson, IN	Decatur, AL	Lebanon, KY	Seneca County, NY
Ardmore, OK	Eastern Shore, MD	Lee’s Summit, MO	Shasta County, CA
Ashland, KY	Elizabethtown, KY	Lexington, KY	Shreveport, LA
Atascadero, CA	Evansville, IN	Lincoln County, NE	Sikeston, MO
Atlanta, GA	Fairfield County, OH	Long Island, NY	Silver City, NM
Auburn, AL	Fargo, ND	Longview, TX	Spartanburg, SC
Baldwin County, AL	Fauquier County, VA	Louisville, KY	Spokane, WA
Bay County, FL	Fulton County, KY	Madison, SD	Springfield, IL
Bedford, TX	Grant County, NM	Meridian, MS	Sullivan County, NY
Beeville, TX	Grant County, WA	McDowell County, NC	Sumter County, SC
Binghamton, NY	Grays Harbor, WA	Mobile, AL	Syracuse, NY
Birmingham, AL	Greene County, NY	Mohawk Valley, NY	Tallahassee, FL
Boone County, IN	Grenada, MS	Monroe County, NY	Taylor, TX
Bowie, TX	Harrison County, IN	Montgomery, AL	Terre Haute, IN
Bryan/College Station, TX	Hazleton, PA	Moorhead, MN	Tioga County, NY
Buffalo, NY	Henderson, KY	Muncie, IN	Tipton County, IN
Bullitt County, KY	Hendricks County, IN	New Braunfels, TX	Tupelo, MS
Cambridge, MD	Hernando County, FL	New York City, NY	Tuscaloosa, AL
Cape Girardeau, MO	Hillsdale County, MI	Obion County, TN	Ulster County, NY
Casper, WY	Hudson Valley, NY	Ontario County, NY	Vermillion County, IN
Catawba County, NC	Huntsville, AL	Oswego County, NY	Vineland, NJ
Centralia, IL	Hutto, TX	Owsley County, KY	Warren County, VA
Champaign County, IL	Independence, MO	Panama City, FL	Wasatch County, UT
Cheyenne, WY	Indianapolis, IN	Pensacola, FL	Watertown, SD
Cleveland County, NC	Jackson, MS	Pierre, SD	Weld County, CO
Clinton, SC	Jackson County, MO	Polk County, NC	Wilkes-Barre, PA
Columbia, SC	Jay County, IN	Ponca City, OK	Williamsport, PA
Conroe, TX	Kalamazoo, MI	Prescott Valley, AZ	Winnebago County, IL
Corpus Christi, TX	Lake Havasu, AZ	Reno, NV	Yankton, SD



The workforce report documented the number of underemployed workers in the labor shed who would be available for an employer at various pay rates ranging from \$8.00 per hour or below to \$30.00 per hour or above and who appear to have the skills, experience, and education to justify the desired pay rates. The table below shows that 25% (lower quartile) of the underemployed workers in the labor shed would take a new job for \$12.46 per hour or less. In locations surveyed over the past eighteen months, the lowest desired pay rate in the lower quartile of underemployed workers was \$8.98 per hour or less, the median \$11.25 or less, and the highest desired pay rate was \$18.63 per hour or less.

**DESIRED WAGES (per hour) – LOWER QUARTILE
UNDEREMPLOYED WORKERS**

Desired Wage Labor Shed	Lowest Desired Wage Locations Surveyed Past 18 Months	Median Desired Wage Locations Surveyed Past 18 Months	Highest Desired Wage Locations Surveyed Past 18 Months
\$12.46 or Less	\$8.98 or Less	\$11.25 or Less	\$18.63 or Less

Those underemployed workers in the upper quartile have more education, better skills, and greater experience. Yet based on current pay rates, they are considered to be underemployed. In the labor shed, the underemployed individuals in the upper 25% desire \$20.67 per hour or more. In locations surveyed over the past eighteen months, the lowest desired pay rate in the upper quartile of underemployed workers was \$15.87 or more, the median \$20.14 or more, and the highest was \$33.00 per hour or more.

**DESIRED WAGES (per hour) – UPPER QUARTILE
UNDEREMPLOYED WORKERS**

Desired Wage Labor Shed	Lowest Desired Wage Locations Surveyed Past 18 Months	Median Desired Wage Locations Surveyed Past 18 Months	Highest Desired Wage Locations Surveyed Past 18 Months
\$20.67 or More	\$15.87 or More	\$20.14 or More	\$33.00 or More



The following charts compare the percentages of underemployed workers in the East Central Indiana Eastern Sector region who have experience in various fields of employment with the percentages of underemployed workers in locations surveyed over the past eighteen months who have the same type of experience. In the charts, the East Central Indiana Eastern Sector region is referred to as “labor shed”.

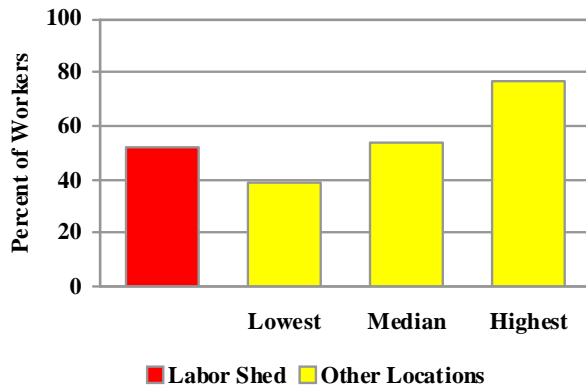
The experience charts are followed by skills charts, which compare the percentages of underemployed workers in the East Central Indiana Eastern Sector region who possess various types of employment skills with the percentages of underemployed workers in locations surveyed over the past eighteen months who possess the same skills. In the charts, the East Central Indiana Eastern Sector region is referred to as “labor shed”.



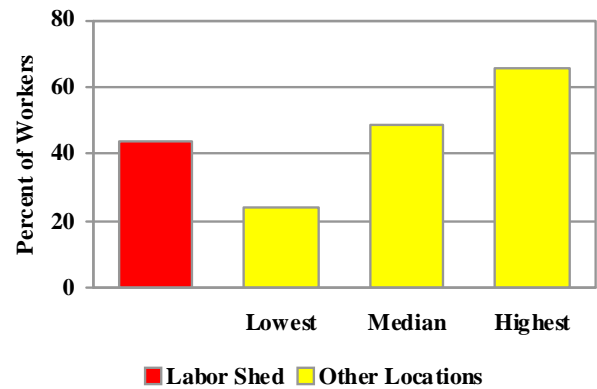
**COMPARISON OF EXPERIENCE
UNDEREMPLOYED WORKERS**

**The East Central Indiana Eastern Sector Area /
Locations Surveyed Over the Past 18 Months**

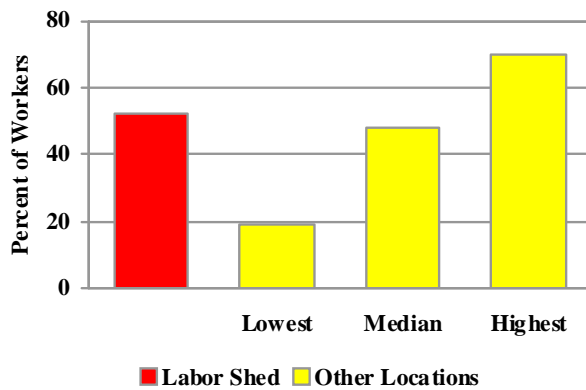
OFFICE



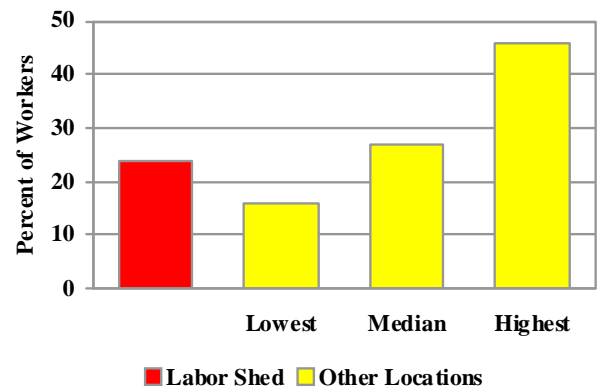
**WAREHOUSE / DISTRIBUTION /
TRANSPORTATION**



**MANUFACTURING / ASSEMBLY /
FABRICATION**



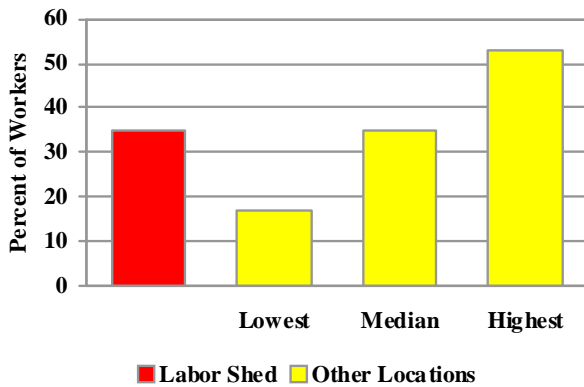
**MEDICAL /
HEALTH SCIENCES**



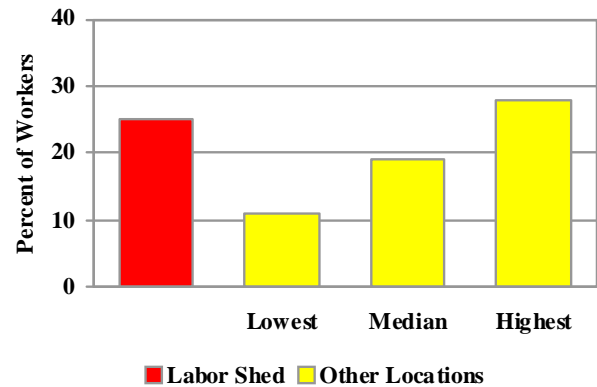
**COMPARISON OF EXPERIENCE
UNDEREMPLOYED WORKERS**

**The East Central Indiana Eastern Sector Area /
Locations Surveyed Over the Past 18 Months**

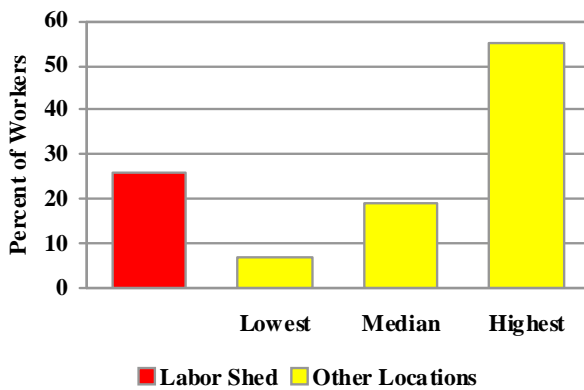
**MAINTENANCE /
INSTALLATION / REPAIR**



CALL CENTER



INFORMATION TECHNOLOGY

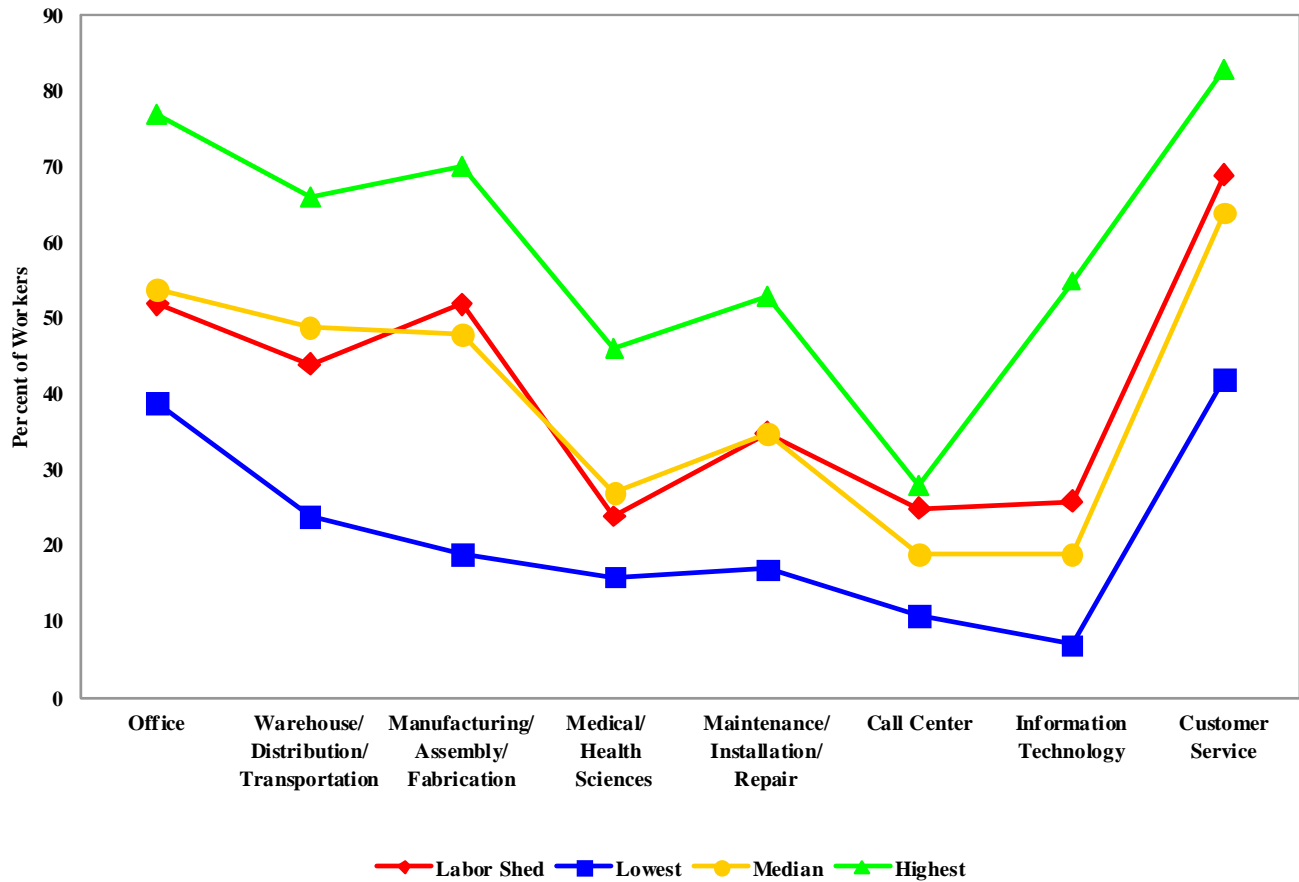


CUSTOMER SERVICE



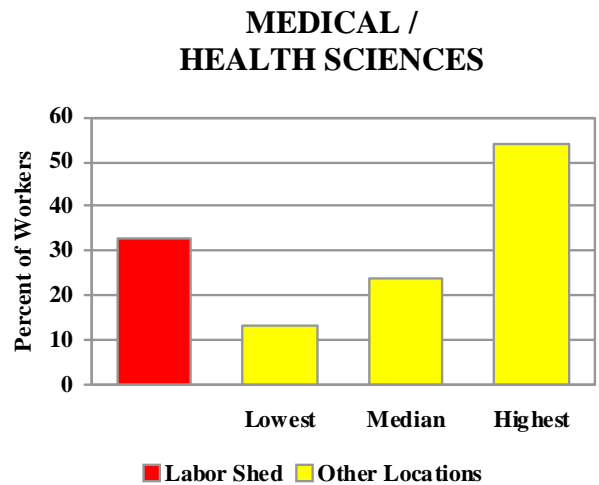
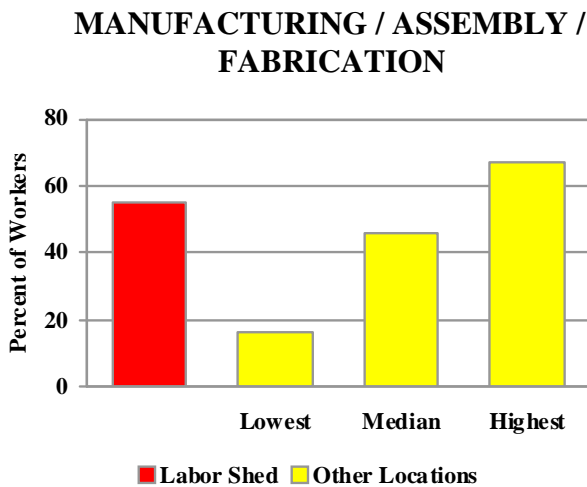
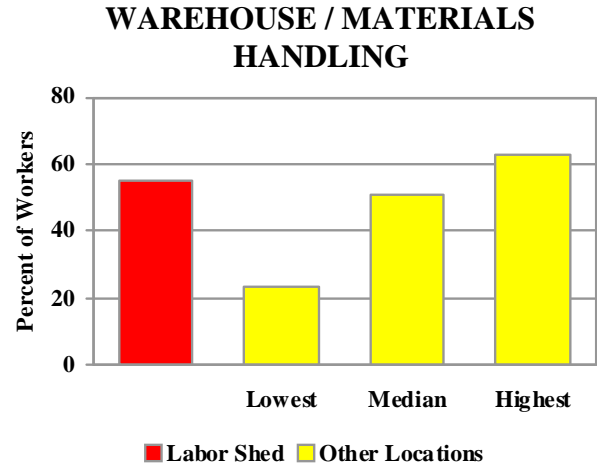
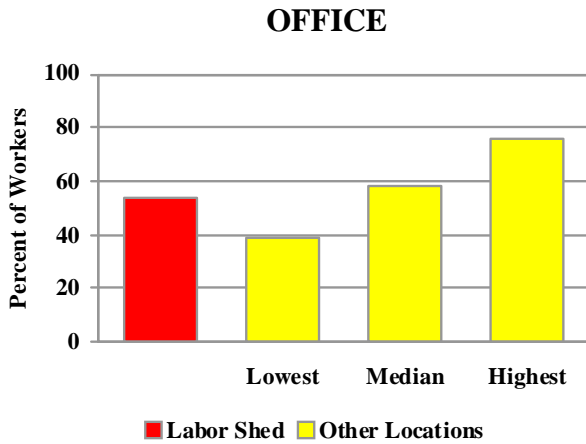
**SUMMARY COMPARISON OF EXPERIENCE
UNDEREMPLOYED WORKERS**

**The East Central Indiana Eastern Sector Area /
Locations Surveyed Over the Past 18 Months**



COMPARISON OF SKILLS UNDEREMPLOYED WORKERS

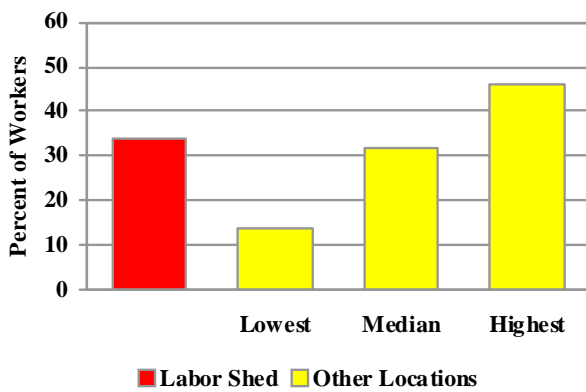
**The East Central Indiana Eastern Sector Area /
Locations Surveyed Over the Past 18 Months**



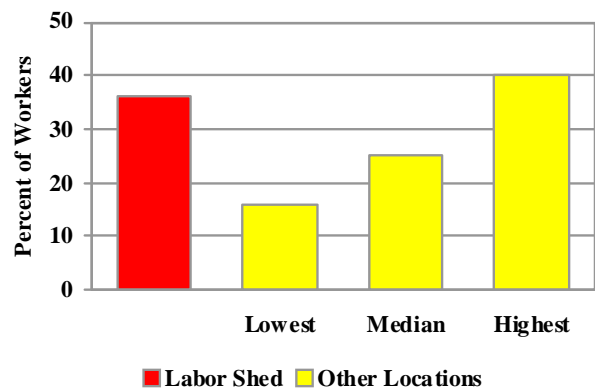
COMPARISON OF SKILLS UNDEREMPLOYED WORKERS

**The East Central Indiana Eastern Sector Area /
Locations Surveyed Over the Past 18 Months**

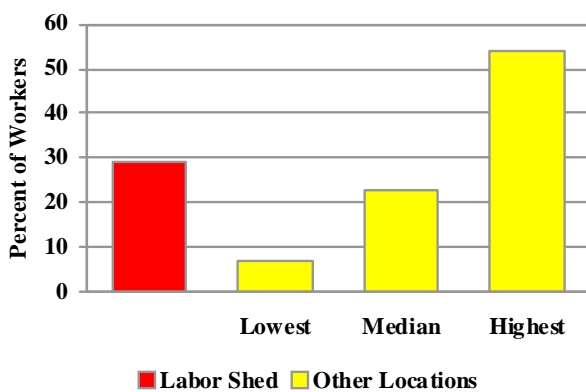
**MAINTENANCE /
INSTALLATION / REPAIR**



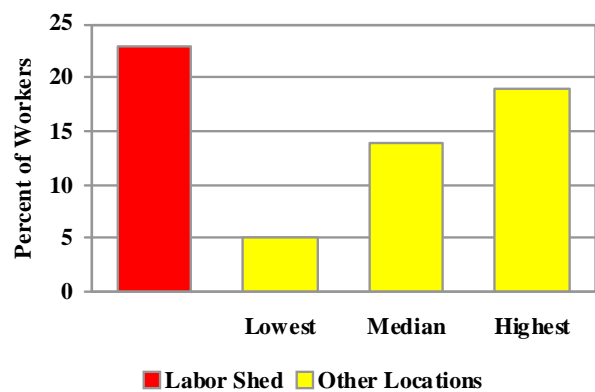
**TECHNICIAN / QUALITY
ASSURANCE**



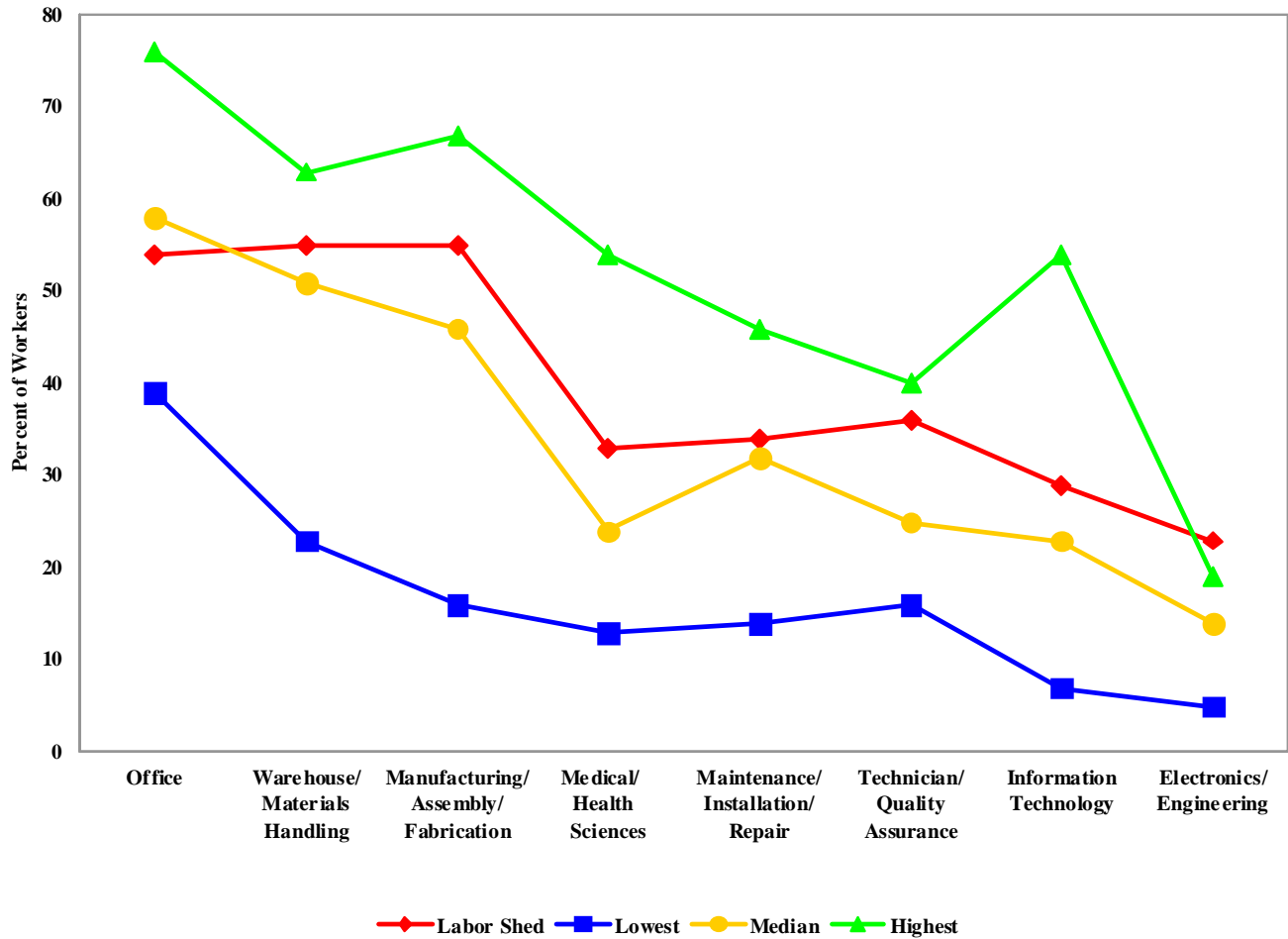
INFORMATION TECHNOLOGY



ELECTRONICS / ENGINEERING



**SUMMARY COMPARISON OF SKILLS
UNDEREMPLOYED WORKERS**
**The East Central Indiana Eastern Sector Area /
Locations Surveyed Over the Past 18 Months**



CLOSING REMARKS

The foregoing report represents an assessment of the underemployment that exists in the East Central Indiana Eastern Sector region. It includes a set of important interlocking measurements of the number of underemployed workers, their cost, skills, experience, education, reliability, productivity, and other related factors. The information allows the economic development professional and the site-selection team to view the area in comparison to other locations.

Attention should be given to the “Employers’ Views of the East Central Indiana Area Total Workforce” section of this report in which local employers’ views of the characteristics of local workers are compared with employers’ views in other locations where the identical questions have been asked in identical fashion.

Similarly, attention should be given to the final section of this report, “National Comparative Observations”, which compares, employing an identical methodology, the costs, experience, and skills of local underemployed workers with those underemployed workers in locations surveyed by The Pathfinders over the past eighteen months.

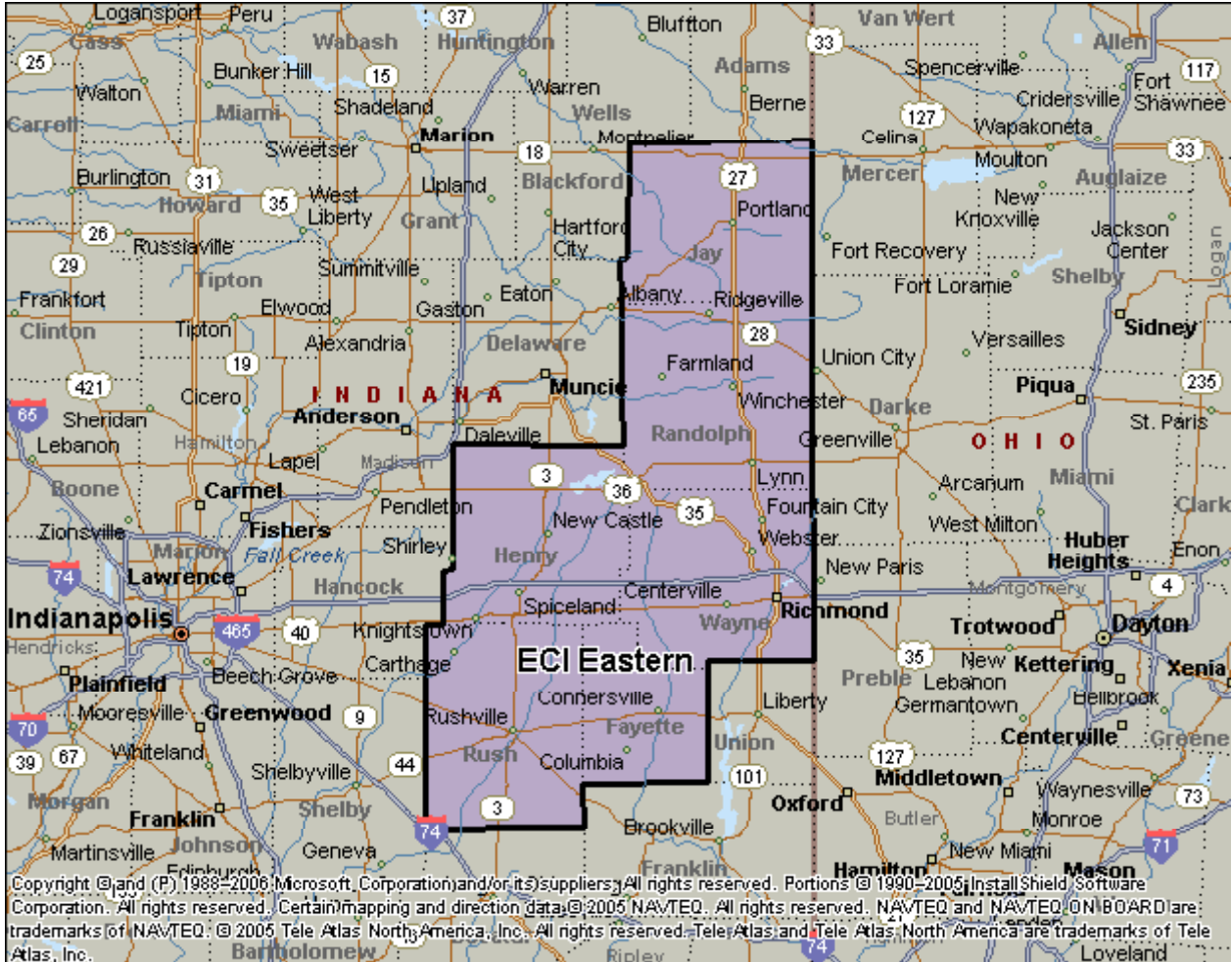
While the number of underemployed workers in the East Central Indiana Eastern Sector region, including their cost, skills, and experience, is the focus of this report, the data should be interpreted in a comparative perspective just as the corporate site selector will in deciding among competing locations.

For Informational Purposes:

The East Central Indiana Eastern Sector Area Civilian Workforce	102,800
Largest Workforce Surveyed by The Pathfinders	5,000,000
Median Workforce Surveyed by The Pathfinders	165,050
Smallest Workforce Surveyed by The Pathfinders.....	3,350



MAP OF EAST CENTRAL INDIANA EASTERN SECTOR LABOR SHED





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