



LABORSHED ANALYSIS

A STUDY OF WORKFORCE CHARACTERISTICS

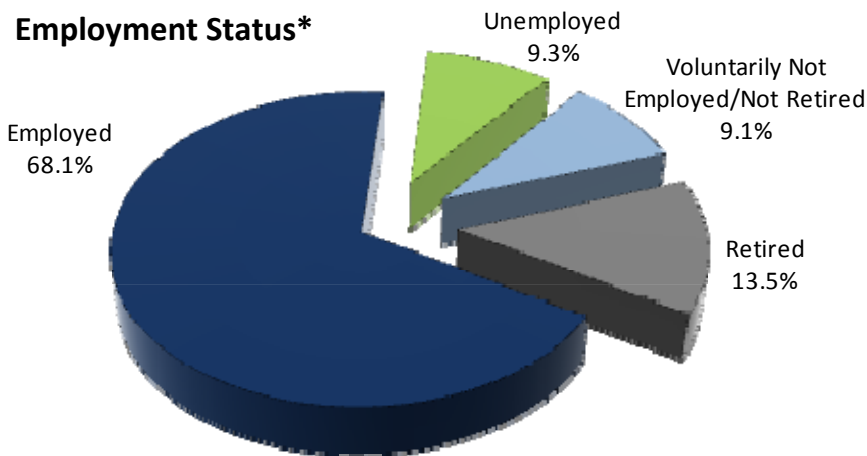
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Laborshed Studies

A Laborshed is defined as the area or region from which an employment center draws its commuting workers. To determine the approximate boundaries of the Quad Cities Laborshed area, local employers supplied the ZIP code listings of where each of their employees reside. This Laborshed analysis addresses underemployment, the availability and willingness of current and prospective employees to change employment within the workforce, current and desired occupations, wages, hours worked and distance willing to commute to work.

Employment Status*



*Employment status is self-identified by the survey respondent. The unemployment percentage above does not reflect the unemployment rate published by the U.S. Bureau of Labor Statistics, which applies a stricter definition.

Total Potential Labor Force: 531,899 (entire Laborshed Area)

Estimated Number of Individuals Very Likely or Somewhat Likely to Change or Accept Employment (122,427)

- 98,615 Employed
- 7,205 Unemployed
- 5,633 Voluntarily Not Employed, Not Retired
- 10,974 Retired

Underemployment

The underemployed are composed of individuals who are working fewer than 35 hours per week but desire more hours; who are working at wages equal to or less than the national poverty level; and/or who are working in positions that do not meet their skill or education levels, or worked for higher wages at previous employment.

- 2.6% Inadequate hours (2,564 people)
- 2.8% Mismatch of skills (2,761 people)
- 1.3% Low income (1,282 people)
- 5.0% Total estimated underemployment (4,931 people)

Individuals may be underemployed for more than one reason, but are counted only once for total estimated underemployment.

Industrial Classification of the Employed

Industry	% of Laborshed	# of Employed	% Employed	% Willing to Change Employment	% Unemployed
Education	18.9%	68,460	71.9%	15.0%	3.8%
Manufacturing	15.7%	56,869	68.9%	27.0%	9.3%
Healthcare & Social Services	15.5%	56,145	76.2%	19.3%	7.7%
Wholesale & Retail Trade	13.3%	48,176	60.6%	43.6%	12.9%
Public Administration & Government	8.2%	29,702	63.0%	19.0%	6.5%
Transportation, Communication & Utilities	6.4%	23,182	60.8%	24.4%	12.2%
Personal Services	6.0%	21,733	70.0%	23.8%	3.3%
Professional Services	5.8%	21,009	71.9%	34.1%	15.8%
Finance, Insurance & Real Estate	3.8%	13,764	69.2%	37.0%	10.3%
Construction	2.7%	9,780	65.5%	31.6%	17.2%
Agriculture, Forestry & Mining	1.8%	6,520	81.3%	30.8%	0.0%
Entertainment & Recreation	1.3%	4,709	75.0%	22.2%	16.7%
Active Military Duty	0.6%	2,173	44.4%	25.0%	11.1%

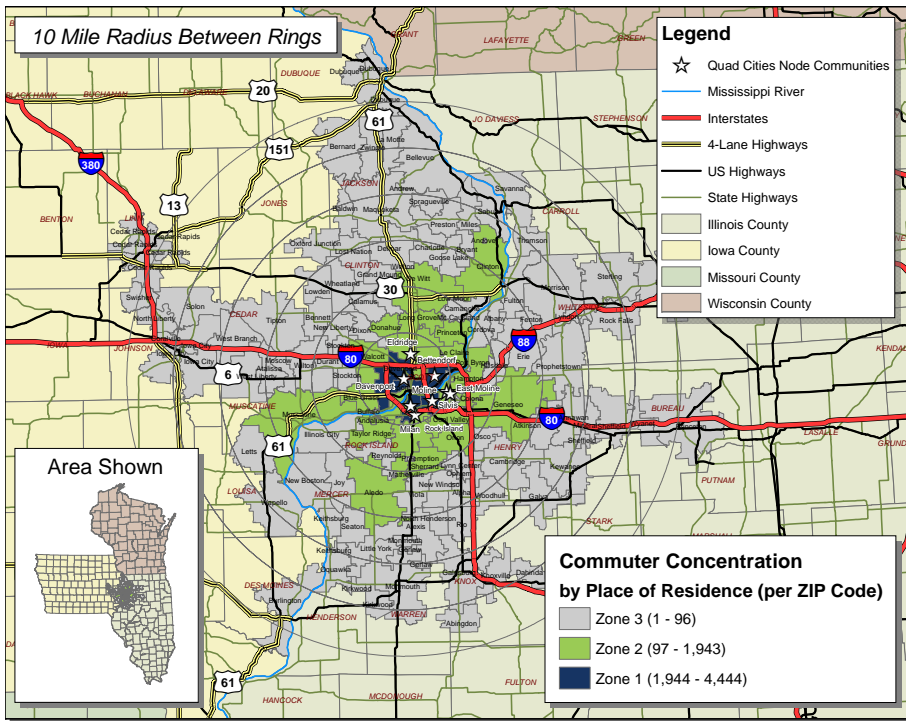
Survey respondents from the Quad Cities Laborshed area were asked to identify the industry in which they are currently working. The largest concentration of workers are employed in the education industry.

Quick Facts

(Employed - willing to change employment)

- 14.7% are working multiple jobs
- Currently working an average of 43 hours per week
- Average age is 47 years old
- 25.1% currently working within the production, construction & material handling occupational category followed by 24.2% within the professional, paraprofessional, & technical occupational category
- Most frequently identified job search sources:
 - Internet
 - www.monster.com
 - www.iowaworkforce.org
 - www.careerbuilder.com
 - Local/Regional newspapers
 - Quad City Times
 - Moline Dispatch
 - Clinton Herald
 - Networking through friends, family and acquaintances
 - Local IowaWORKS Centers

Quad Cities Laborshed Area



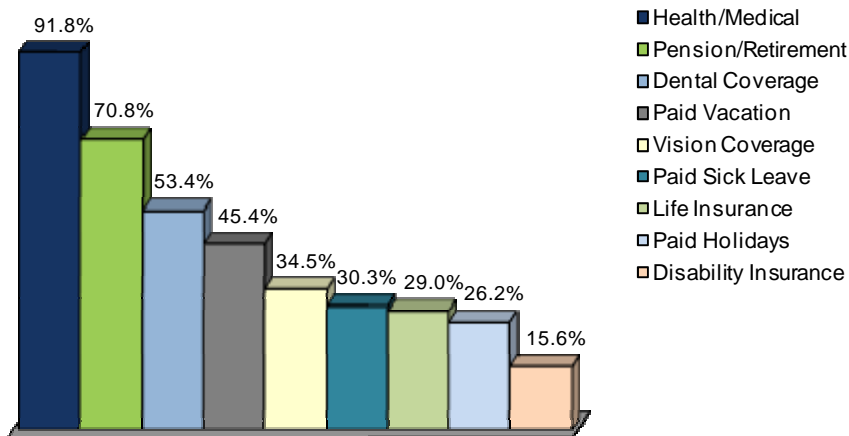
Commuting Statistics

The map at the left represents commuting patterns into the Quad Cities with the concentration per ZIP code represented in the legend.

Those who are willing to change/accept employment in the Quad Cities Laborshed area are willing to commute an average of 23 miles one way for employment opportunities.



Benefits Currently Offered



The survey provides the respondents an opportunity to identify employment benefits they currently are offered. The chart at left provides the percentage of responses from those that are currently employed. The top nine benefits are shown.

The majority (77.7%) of respondents state they are currently sharing the cost of health/medical insurance premiums with their employer. However, 14.3 percent indicate their employer pays the entire cost of insurance premiums.

Education and Median Wage Characteristics by Industry

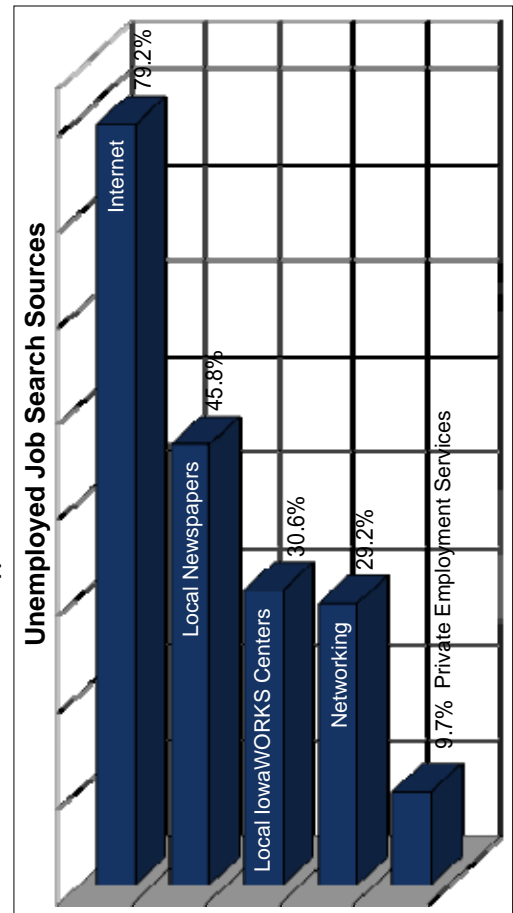
Industry	Education			Median Wages	
	Some Level Beyond High School	Associate Degree	Undergraduate Degree or Higher	Salary Wages (per year)	Non-Salary Wages (per hour)
Agriculture	75.0%	6.3%	25.0%	\$75,000	*
Construction	69.0%	13.8%	20.6%	\$37,000	\$23.10
Manufacturing	64.0%	16.8%	25.4%	\$81,500	\$16.54
Transportation, Communication & Utilities	64.8%	8.1%	29.8%	\$60,000	\$16.00
Wholesale & Retail Trade	63.9%	8.4%	21.3%	\$48,800	\$11.00
Finance, Insurance & Real Estate	79.5%	15.4%	43.6%	\$45,000	\$11.16
Healthcare & Social Services	88.1%	27.3%	36.4%	\$51,000	\$16.53
Personal Services	75.0%	11.7%	35.0%	\$45,000	\$12.00
Entertainment & Recreation	58.3%	8.3%	33.3%	\$47,500	\$10.00
Professional Services	68.4%	15.8%	35.1%	\$60,000	\$12.00
Public Administration & Government	82.6%	10.9%	37.0%	\$70,250	\$21.00
Education	89.2%	8.6%	69.8%	\$50,000	\$11.10

This table includes all respondents without consideration of employment status or willingness to change/enter employment.

*Insufficient survey data/refused

Unemployed - Those Willing to Enter/Re-enter Employment

- An estimated 7,205 unemployed individuals are willing to accept employment
- Average age is 50 years old
- 61.8% are female; 38.2% are male
- Education:
 - 65.8% have an education beyond high school
 - 3.9% have vocational training
 - 7.9% are trade certified
 - 9.2% have an associate degree
 - 15.8% have an undergraduate degree
 - 5.3% have a postgraduate/professional degree
- Estimated wage range to attract the upper 66-75% qualified hourly wage applicants is \$12.00 to \$12.50/hr. with a median of the lowest wage of \$10.00
- Willing to commute an average of 24 miles one way for the right opportunity
- 76.3% expressed interest in temporary and 61.8% in seasonal employment opportunities
- 43.4% expressed interest in working varied shifts (2nd, 3rd & split)
- Would prefer to enter employment that offers the following benefits:
 - Health/medical insurance - 85.9%
 - Pension/retirement options - 48.4%
 - Dental coverage - 34.4%
 - Paid vacation - 23.4%
 - Vision coverage - 23.4%
 - Paid sick leave - 15.6%
 - Disability insurance - 10.9%
 - Life insurance - 10.9%
 - Paid holidays - 9.4%
 - Prescription drug coverage - 6.2%
 - Shift differential pay - 1.6%
 - Stock options - 1.6%
- 69.1% indicated they are seeking employment offers where the employer/employee share the cost of medical insurance premiums.



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