

**THE
QUAD-CITY, ARIZONA
AREA
LABOR AVAILABILITY REPORT**

January, 2013

Compiled and Prepared by



THE PATHFINDERS

www.thepathfindersus.com

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INTRODUCTION

The Pathfinders has employed its many years of 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 Quad-City, Arizona area workforce. In site-selection projects, the question that most often drives the search is whether the candidate location has the workforce needed for a new or expanding operation. When considering the workforce of a possible location, a prospect basically wants to know:

- Can I find the workers I need in this location?
- Do these workers have any skills and/or experience that pertain to my operation?
- How much will these workers cost?

Consequently, an analysis of an area's workforce became a key component of site searches conducted by The Pathfinders. The report that follows was developed as a tool for economic development officials for use in business recruitment and workforce development efforts. Senior human resources executives from among corporate clients assisted in refining the methodology and report format.

With regard to labor availability, while unemployed workers are a source considered in hiring, companies typically also staff a new operation 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 Pathfinders was retained by the Quad-City Regional Workforce Study Partnership to quantify the extent to which both unemployment and underemployment exist in the Quad-City, Arizona area. This report also represents the objective and professional view of The Pathfinders with regard to workforce quality, availability, costs, experience and skills that a new or expanding employer can expect in the Quad-City, Arizona region.

The information presented in this report has been developed independently of the client, and the client has not influenced the findings.



KEY FINDINGS

- The Quad-City, Arizona area, referred to in this report as the “labor shed”, has a household population of approximately 133,500; a civilian labor force of approximately 56,700; and a pool of approximately 4,800 unemployed persons who are actively seeking work.
- The results of this survey indicate that a new or expanding employer will be able to attract employees from an additional pool of about 4,300 underemployed workers.
- The median current pay rate of the underemployed workers in the labor shed is \$12.40 per hour, and their median desired pay rate is \$14.75 per hour.
- Survey results indicate that the underemployed workers in the labor shed have high levels of experience and skills in warehousing/distribution and maintenance/installation/repair.
- Results indicate that underemployed workers are willing to commute an average of 33 miles to a new job, in contrast to their current average commute of 21 miles.
- Survey results indicate 10% of the underemployed in the labor shed have at least a high school degree or equivalent.
- In total, the Quad-City, Arizona area has approximately 9,100 available workers for new or expanding businesses.



METHODOLOGY

The first step in assessing the workforce of the Quad-City, Arizona 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 Quad-City, Arizona 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 Chino Valley; Dewey/Humboldt; Prescott; Prescott Valley and other selected portions of Yavapai County, Arizona.

Selected online resources were used in this project. Additionally, The Pathfinders conducted interviews with individuals throughout the Quad-City, Arizona region. Those individuals were proportionally stratified across age, household income, and zip codes. The purpose of these surveys 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 and the quality and characteristics of both the underemployed and unemployed workers in the area. Further, 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 included in the results.

It is 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.



NUMBER OF AVAILABLE WORKERS

The Quad-City, Arizona Area Labor Shed

The Quad-City, Arizona area labor shed has a household population of approximately 133,500. The civilian labor force numbers approximately 56,700, and the labor shed contains approximately 4,800 unemployed people who are actively seeking work.

The results of this assessment determined that approximately 4,300 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. Together with the unemployed, actively seeking work individuals, the Quad-City, Arizona area has approximately 9,100 available workers for new or existing employers.

TOTAL AVAILABLE WORKERS

Number of underemployed workers	4,300
Number of unemployed, actively seeking work individuals	4,800
Total Number of Workers Available for Employers*	9,100

* The reader is cautioned that, while the number of 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.



ASSESSMENT OF THE UNDEREMPLOYED WORKFORCE**The Quad-City, Arizona Area Labor Shed**

The 4,300 underemployed workers identified in this report 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 following charts represent the desired pay rates of the underemployed individuals in the labor shed. Desired wages are shown by specific rates, range and percentiles.

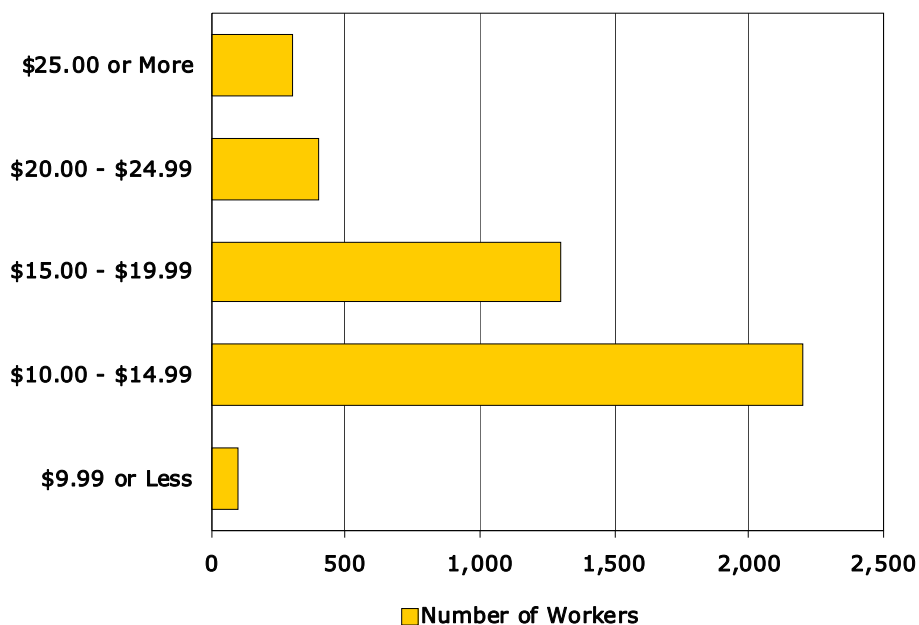
**NUMBER OF UNDEREMPLOYED WORKERS AVAILABLE
AT SPECIFIC WAGE RATES PER HOUR (rounded)**

Desired Pay Rate	Number Available
\$9.99 or Less	100
\$10.00 - \$11.99	500
\$12.00 - \$13.99	1,100
\$14.00 - \$15.99	1,000
\$16.00 - \$17.99	600
\$18.00 - \$19.99	300
\$20.00 - \$21.99	100
\$22.00 - \$23.99	200
\$24.00 - \$25.99	100
\$26 or More	300



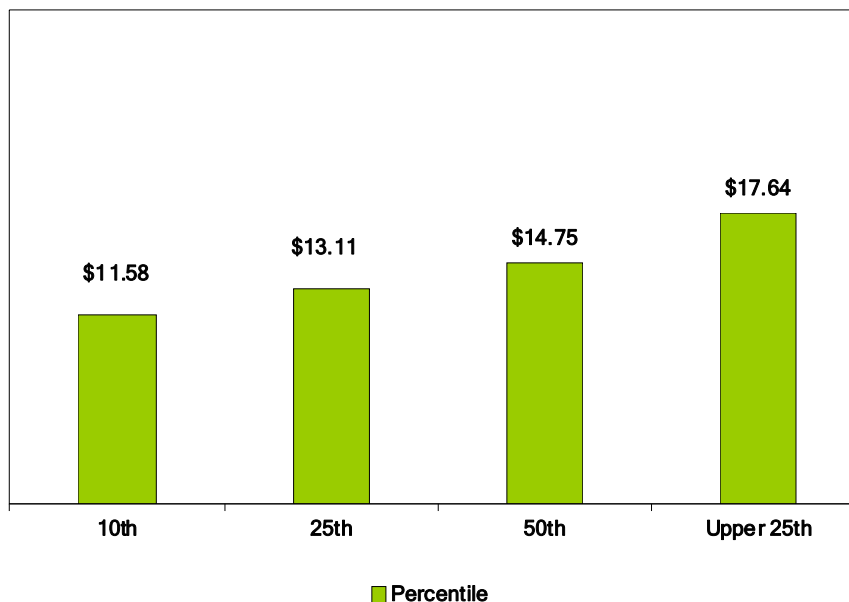
DESIRED WAGE RATES PER HOUR BY RANGE

4,300 Underemployed Workers



DESIRED WAGE RATES PER HOUR BY PERCENTILE

4,300 Underemployed Workers



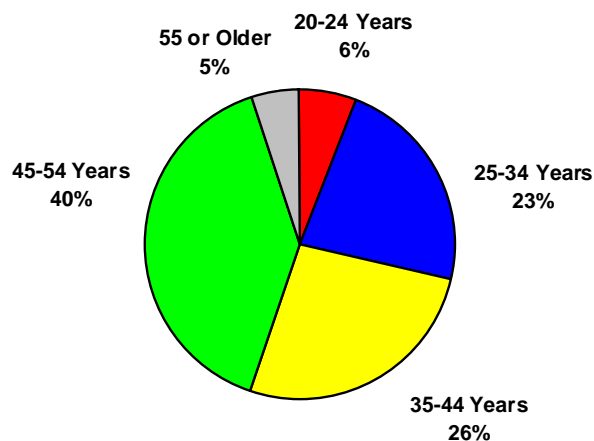
CHARACTERISTICS OF UNDEREMPLOYED WORKERS

The Quad-City, Arizona Area Labor Shed

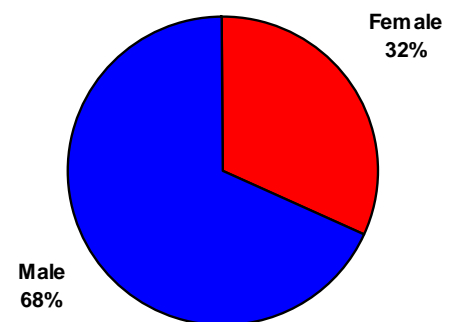
4,300 Underemployed Workers

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 and civilian labor force as a whole.**

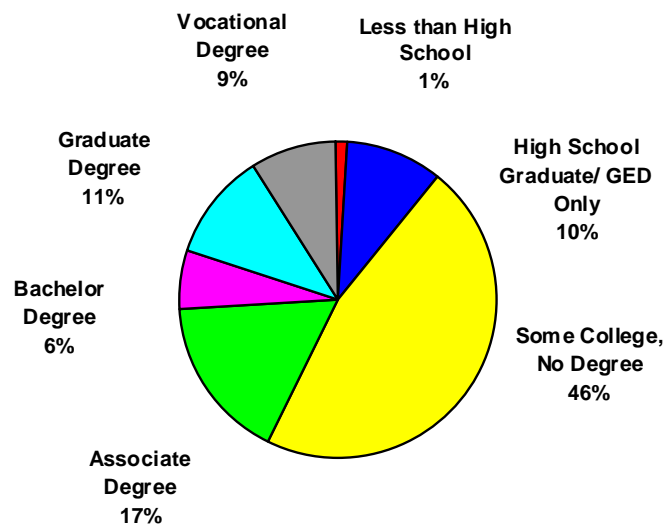
AGE - Average 41 Years

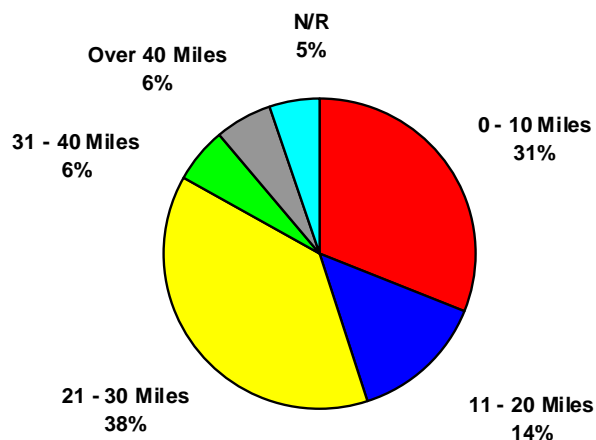
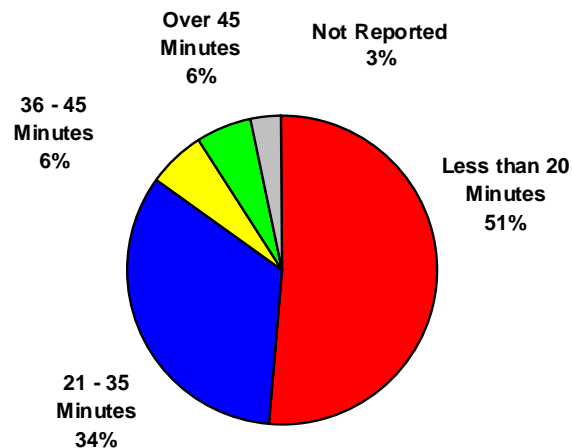


GENDER

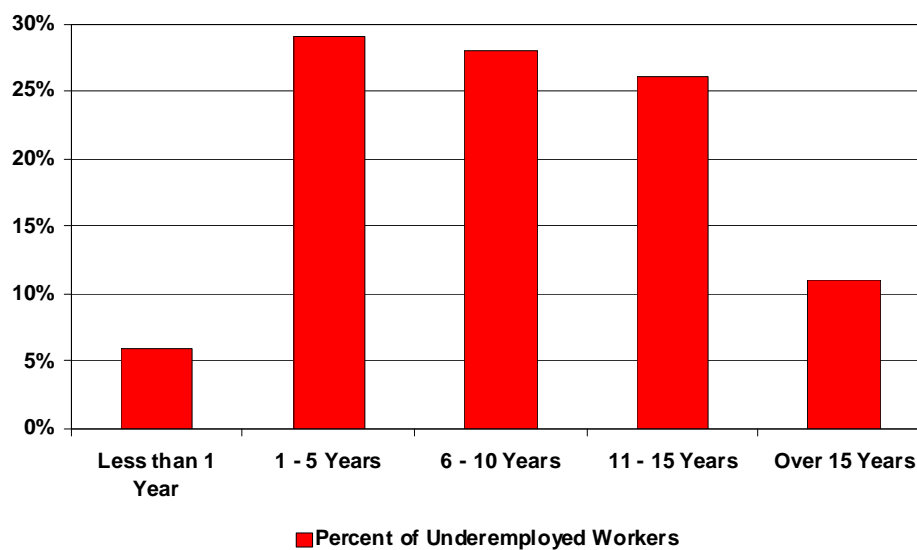


EDUCATION



CHARACTERISTICS OF UNDEREMPLOYED WORKERS**4,300 Underemployed Workers****CURRENT COMMUTE DISTANCE****CURRENT COMMUTE TIME**

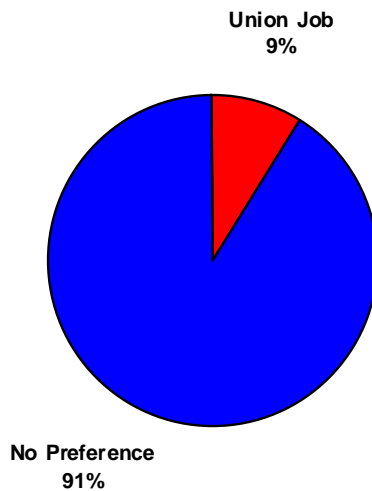
The average commute time of the underemployed workers in the labor shed is 22 minutes, and the average current commute distance is 21 miles.

LENGTH OF TIME IN CURRENT JOB

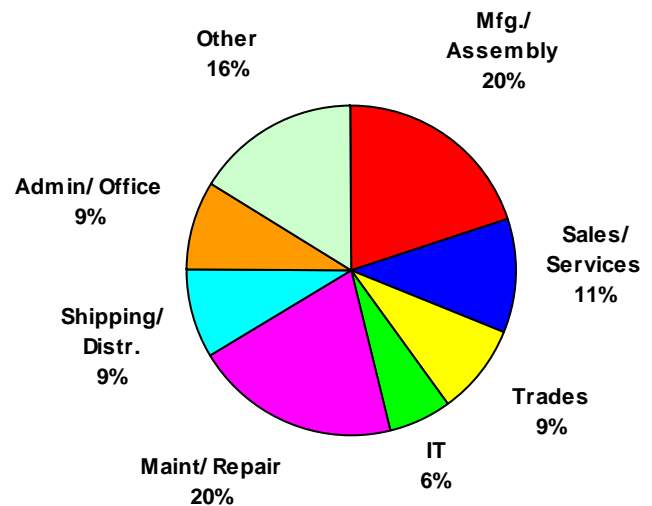
CHARACTERISTICS OF UNDEREMPLOYED WORKERS

4,300 Underemployed Workers

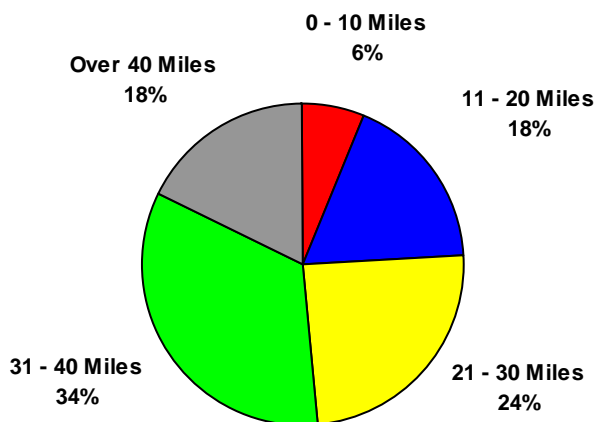
UNION PREFERENCE



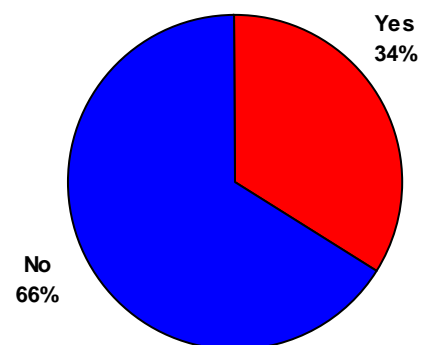
CURRENT AREA OF EMPLOYMENT



MILES WILLING TO COMMUTE Average 33 Miles



SPEAK A LANGUAGE OTHER THAN ENGLISH*



* Of the 34% of workers who speak another language, 42% speak Spanish. The remaining speak various other languages.



EXPERIENCE AND SKILLS – UNDEREMPLOYED WORKERS

4,300 Underemployed Workers

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 and are designed to ensure inclusiveness considering the multitude of tasks and job titles present in most business, government and institutional operations.

The experience chart reports the approximate number of underemployed workers experienced in each category; the percentage of the total number of underemployed experienced in each category; and, the average number of years of experience in each category.

Likewise, for the skills categories, the charts illustrate the approximate number of underemployed workers in the labor shed who are skilled in each of the categories and the percent of the total underemployed.

It should be noted that individuals polled normally have experience and skills in multiple categories; therefore, the category number of workers will not total to the number of underemployed, nor will the percentages equal 100%.



EXPERIENCE OF UNDEREMPLOYED WORKERS**4,300 Underemployed Workers**

Experience Category	Number of Workers*	Percentage of Total	Average Years of Experience
Warehouse/Distribution/Transportation	2,500	57%	10
Maintenance/Installation/Repair	2,500	57%	10
Customer Service	2,200	51%	7
Sales	1,600	37%	6
Manufacturing/Assembly/Fabrication	1,500	34%	9
Administrative/Management	1,100	26%	5
Office Operations	1,000	23%	14
Hospitality	700	17%	4
Financial Services/Accounting	500	12%	10
Telecommunications	500	11%	7
Information Technology	500	11%	9
Call Center	500	11%	3
Medical/Health Sciences	300	6%	4

* Rounded



SKILLS OF UNDEREMPLOYED WORKERS**4,300 Underemployed Workers**

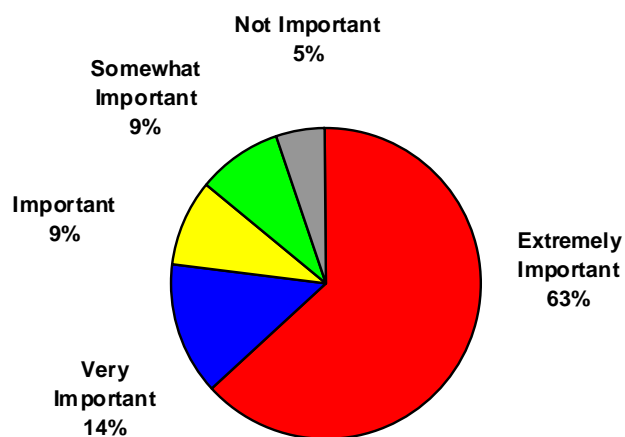
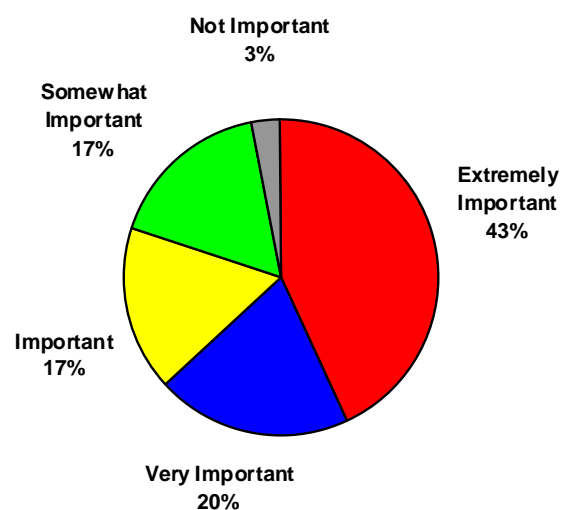
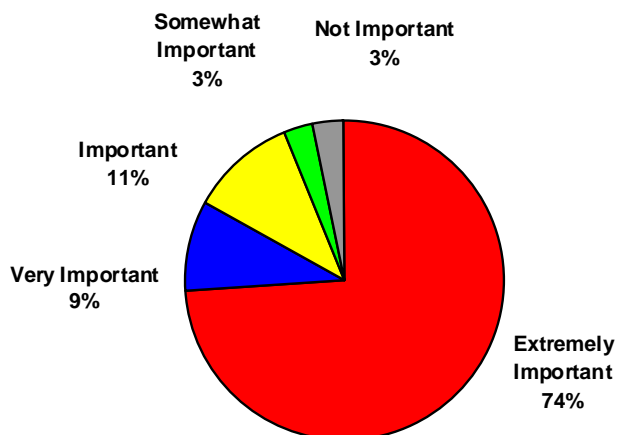
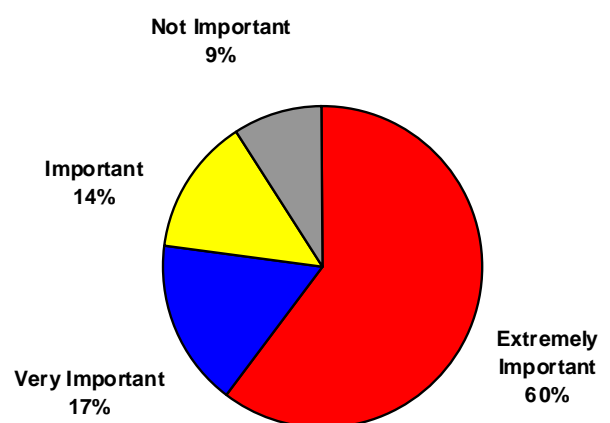
Skills Category	Number of Workers*	Percentage of Total
Warehouse/Materials Handling	3,100	71%
Maintenance/Installation/Repair	2,800	66%
Manufacturing/Assembly/Fabrication	1,800	43%
Machining/Welding/Other Industrial Machines	1,600	37%
Administrative/Management	1,500	34%
Office Operations	1,200	29%
Technician/Quality Assurance	1,000	23%
Electronics/Engineering	900	20%
Information Technology	700	17%
Medical/Health Sciences	600	14%
Telecommunications	500	11%

* Rounded



FACTORS AFFECTING JOB DESIRABILITY**4,300 Underemployed Workers**

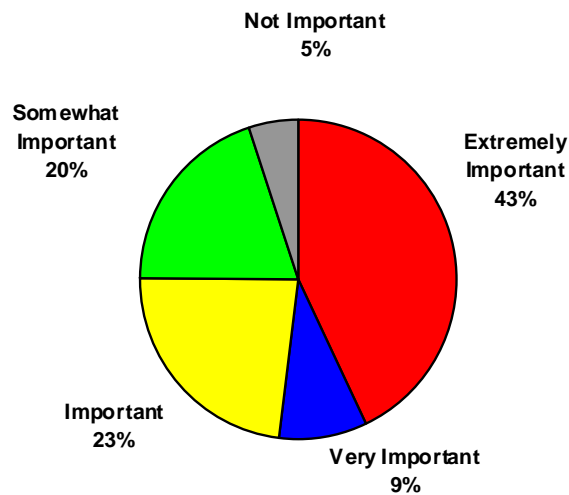
In an effort to identify those factors most important to the Quad-City, Arizona area's underemployed workers relative to consideration of an employer's desirability and a potential job change, the respondents were asked to rate the following job factors from "extremely important" to "not important".

SALARY**LOCATION****INSURANCE BENEFITS****RETIREMENT BENEFITS**

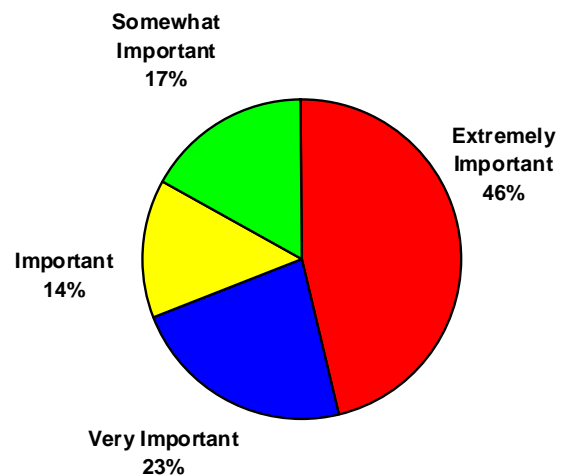
FACTORS AFFECTING JOB DESIRABILITY

4,300 Underemployed Workers

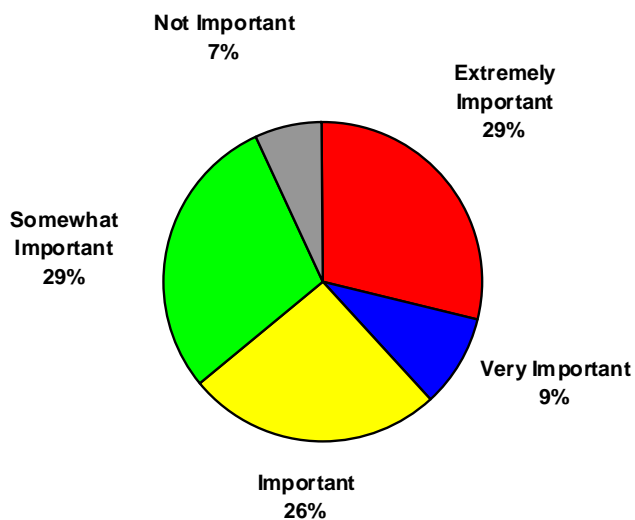
PHYSICAL WORKING ENVIRONMENT



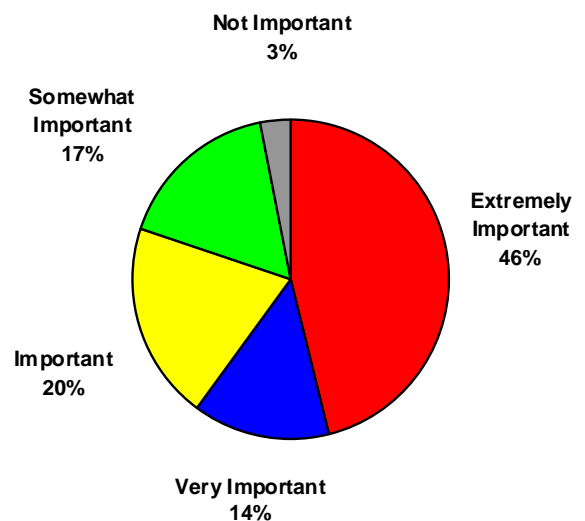
PAID TRAINING PROGRAMS



FLEXIBLE WORK SCHEDULE



OPPORTUNITY FOR ADVANCEMENT

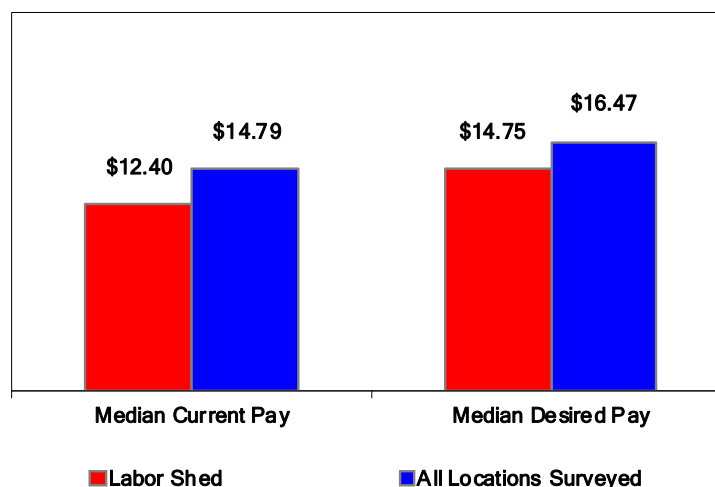


NATIONAL COMPARISONS OF UNDEREMPLOYED WORKFORCE

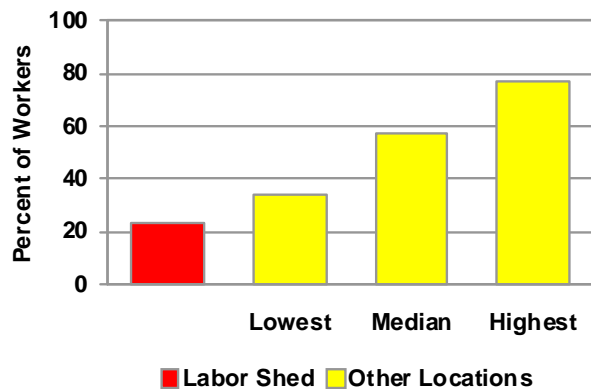
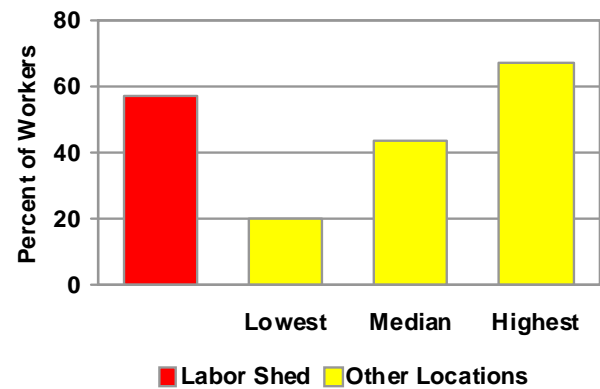
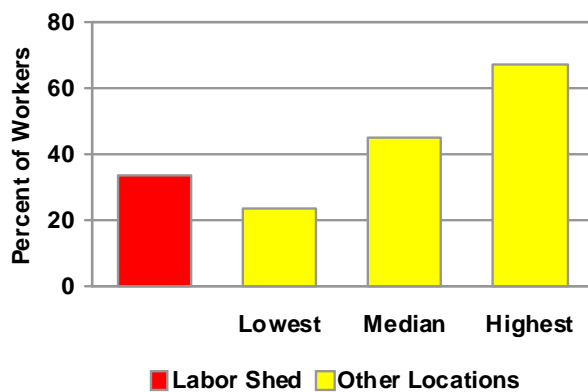
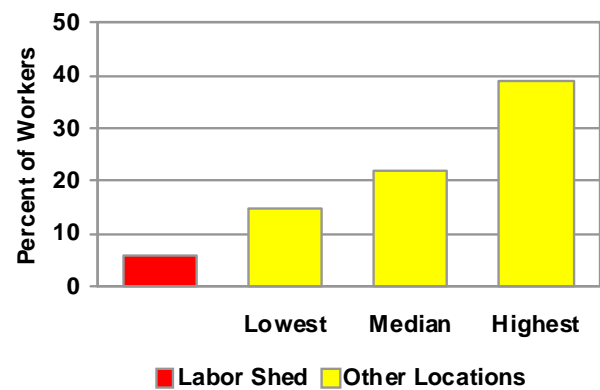
This section of the report provides comparisons of the pay rates, experience and skills of the labor shed's underemployed workforce with the underemployed workforces in other areas previously surveyed by The Pathfinders. A prospect company considering the Quad-City, Arizona region as a location will judge its workforce on a comparative basis. The comparative data for other locations used in the following charts reflect information accumulated over the past eighteen months. The Pathfinders maintains a continuing database of over 700 surveyed counties and communities and more than 30 million workers. In the charts, the Quad-City, Arizona region is referred to as "labor shed".

The chart below illustrates the median current and desired wages of the underemployed workers in the Quad-City, Arizona labor shed as compared to those underemployed workers in all locations surveyed by The Pathfinders over the past eighteen months. As indicated, the median current pay of all surveyed, underemployed workers over the past eighteen months is \$14.79 per hour, and the median desired pay of these workers is \$16.47 per hour. As shown, survey results indicate that the Quad-City, Arizona region's underemployed workers have lower pay rates in both median current pay and desired pay than other locations surveyed.

COMPARISON OF MEDIAN CURRENT / DESIRED WAGES (per hour)

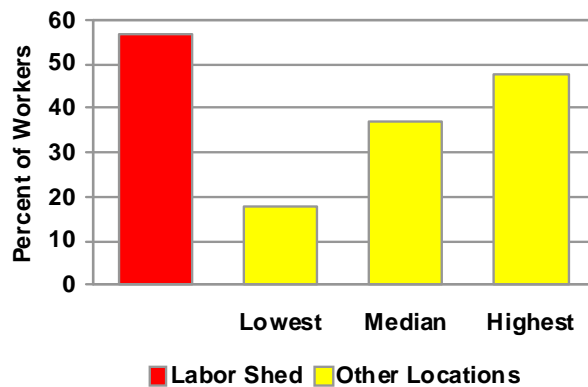


COMPARISON OF EXPERIENCE
UNDEREMPLOYED WORKERS
The Quad-City, Arizona Area /
Locations Surveyed Over the Past 18 Months

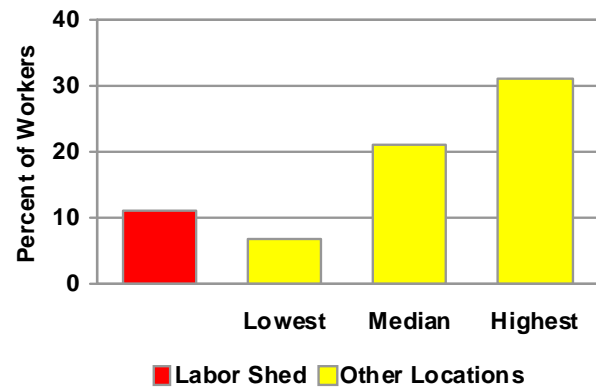
OFFICE**WAREHOUSE / DISTRIBUTION /
TRANSPORTATION****MANUFACTURING / ASSEMBLY /
FABRICATION****MEDICAL /
HEALTH SCIENCES**

COMPARISON OF EXPERIENCE
UNDEREMPLOYED WORKERS
The Quad-City, Arizona Area /
Locations Surveyed Over the Past 18 Months

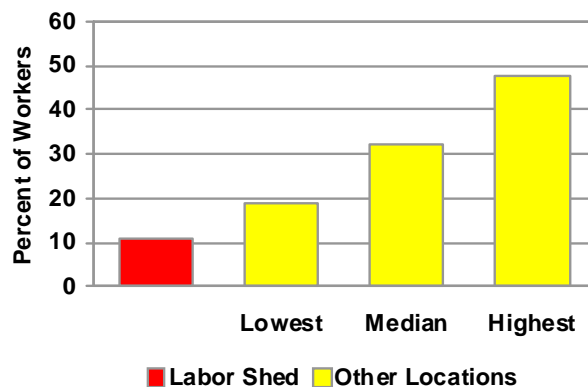
**MAINTENANCE /
INSTALLATION / REPAIR**



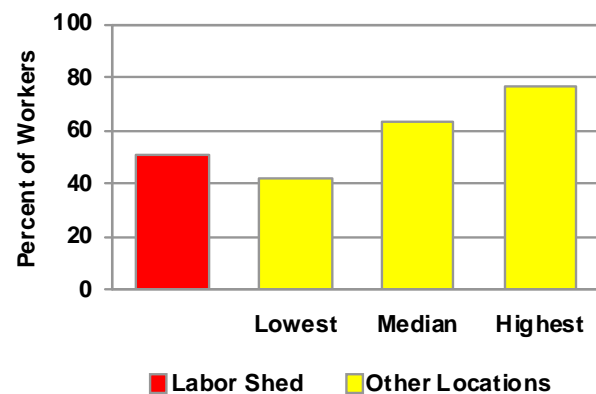
CALL CENTER



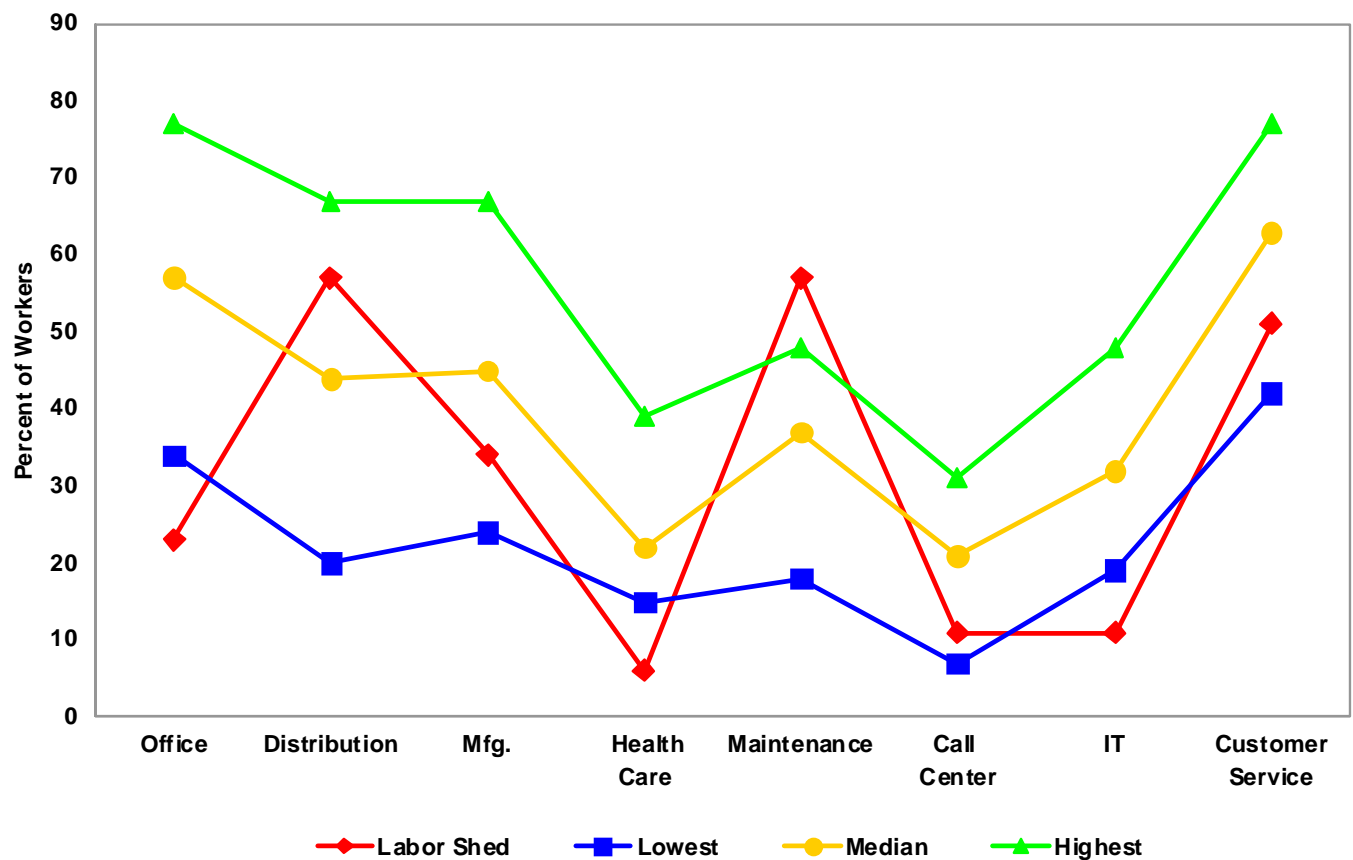
INFORMATION TECHNOLOGY



CUSTOMER SERVICE

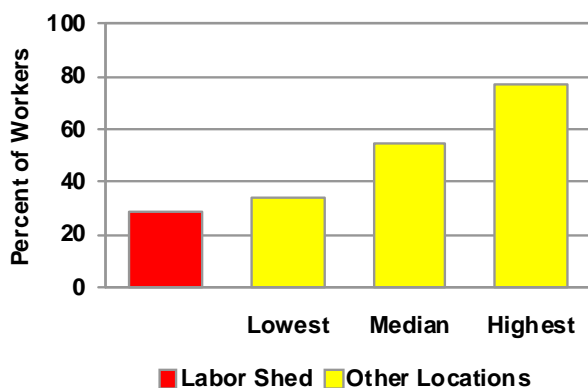


SUMMARY COMPARISON OF EXPERIENCE
UNDEREMPLOYED WORKERS
The Quad-City, Arizona Area /
Locations Surveyed Over the Past 18 Months

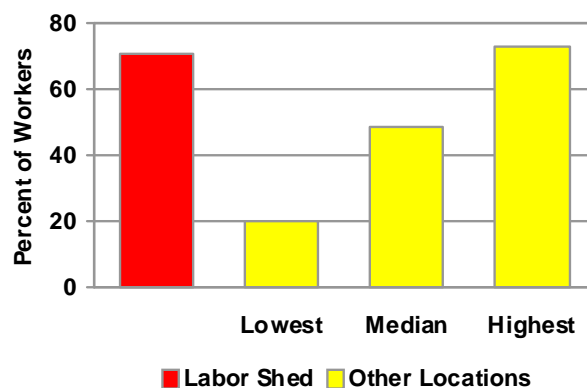


COMPARISON OF SKILLS
UNDEREMPLOYED WORKERS
The Quad-City, Arizona Area /
Locations Surveyed Over the Past 18 Months

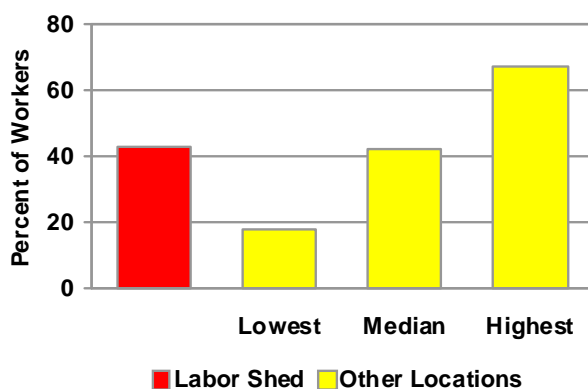
OFFICE



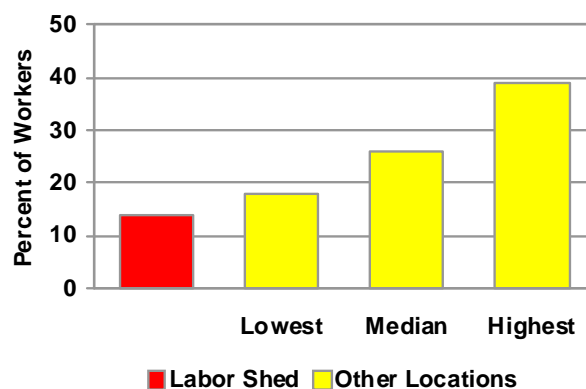
**WAREHOUSE /
MATERIALS HANDLING**



**MANUFACTURING / ASSEMBLY /
FABRICATION**

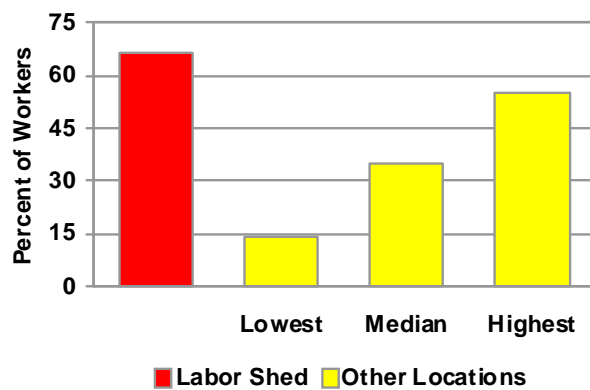


**MEDICAL /
HEALTH SCIENCES**

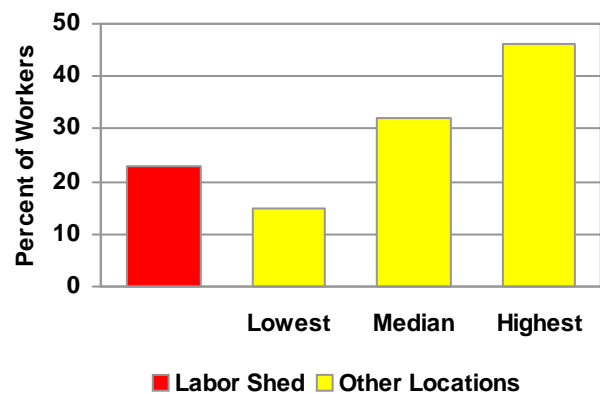


COMPARISON OF SKILLS
UNDEREMPLOYED WORKERS
The Quad-City, Arizona Area /
Locations Surveyed Over the Past 18 Months

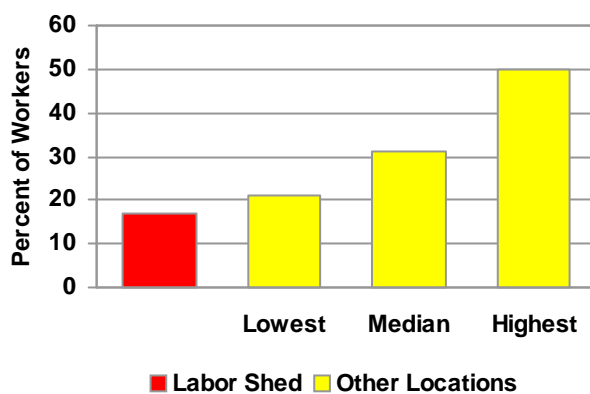
**MAINTENANCE /
INSTALLATION / REPAIR**



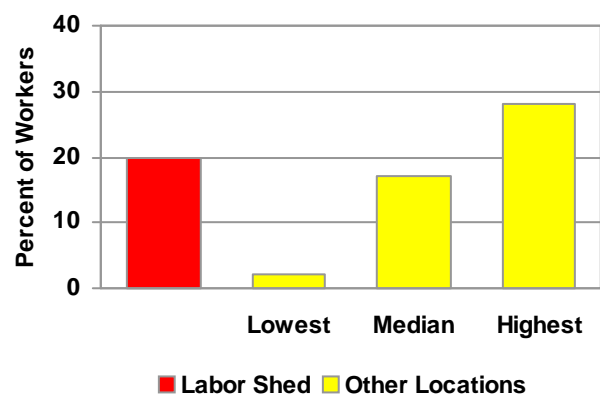
**TECHNICIAN / QUALITY
ASSURANCE**



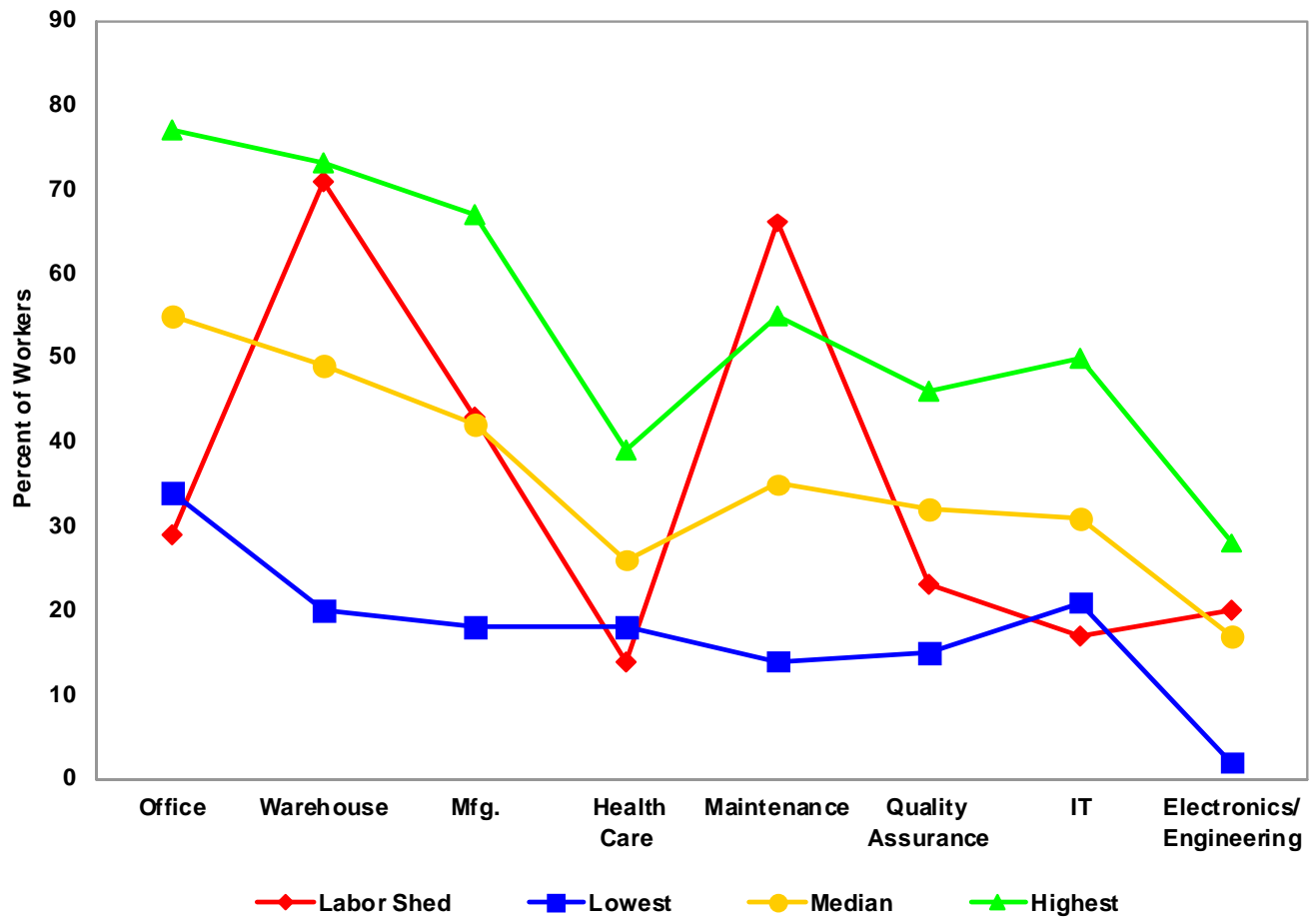
INFORMATION TECHNOLOGY



**ELECTRONICS /
ENGINEERING**



SUMMARY COMPARISON OF SKILLS
UNDEREMPLOYED WORKERS
The Quad-City, Arizona Area /
Locations Surveyed Over the Past 18 Months





THE PATHFINDERS

**P.O. Box 702317
Dallas, Texas 75370**

Telephone: 972-387-3750

E-Mail: info@thepathfindersus.com

Web site: www.thepathfindersus.com