

THE
FLAGLER COUNTY, FLORIDA
LABOR AVAILABILITY REPORT

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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 Flagler County, Florida 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 Flagler County 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 Flagler County.



SUMMARY OF FINDINGS

- Flagler County, referred to in this report as the “labor shed”, has a household population of approximately 87,900 and a civilian labor force of approximately 31,900.
- The labor shed has a pool of approximately 3,400 unemployed persons who are actively seeking work.
- A new employer will be able to attract employees from an additional pool of about 5,500 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 \$15.19 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 \$12.47 per hour or less. At the upper end, the 25% most qualified and experienced will command more than \$20.70 per hour.
- In total, Flagler County has approximately 8,900 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 as obtained from state or national sources.

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 Flagler County. 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 full-time 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.

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 Flagler County labor shed has a household population of approximately 87,900. The civilian labor force numbers approximately 31,900, and the labor shed contains approximately 3,400 unemployed people who are actively seeking work.

The results of this assessment determined that approximately 5,500 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. In total, Flagler County has approximately 8,900 available workers for new or existing employers.

AVAILABLE WORKERS

Number of underemployed workers	5,500
Number of unemployed persons who are actively seeking work	3,400
Total Number of Workers Available for Employers	8,900

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 \$30.00 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.

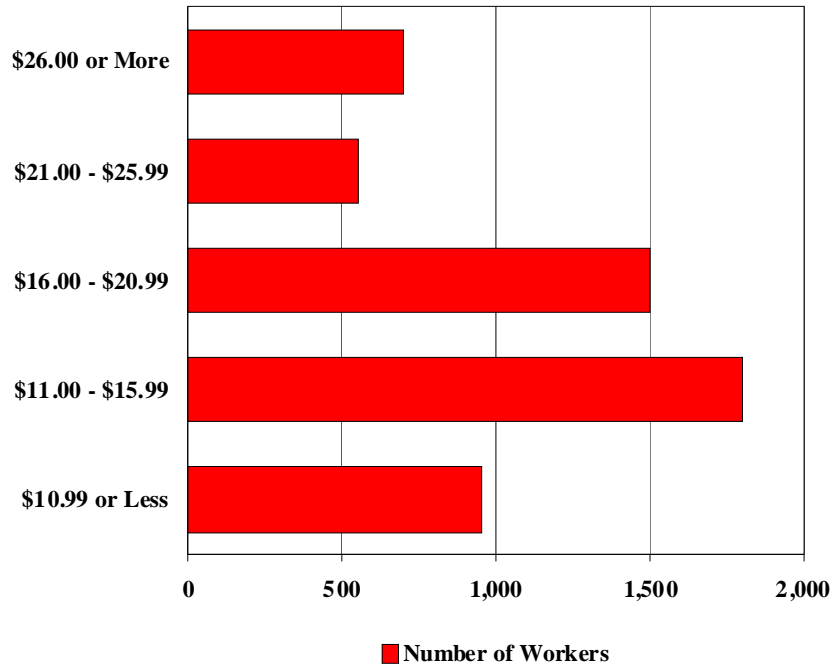
CONVERSION CHART

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
\$ 32.00	\$ 1,280.00	\$ 5,547.00	\$ 66,560.00
\$ 34.00	\$ 1,360.00	\$ 5,893.00	\$ 70,720.00



DESIRED WAGE RATES PER HOUR BY RANGE

5,500 Underemployed Workers



NUMBER OF UNDEREMPLOYED WORKERS AVAILABLE

AT SPECIFIC WAGE RATES PER HOUR (rounded)

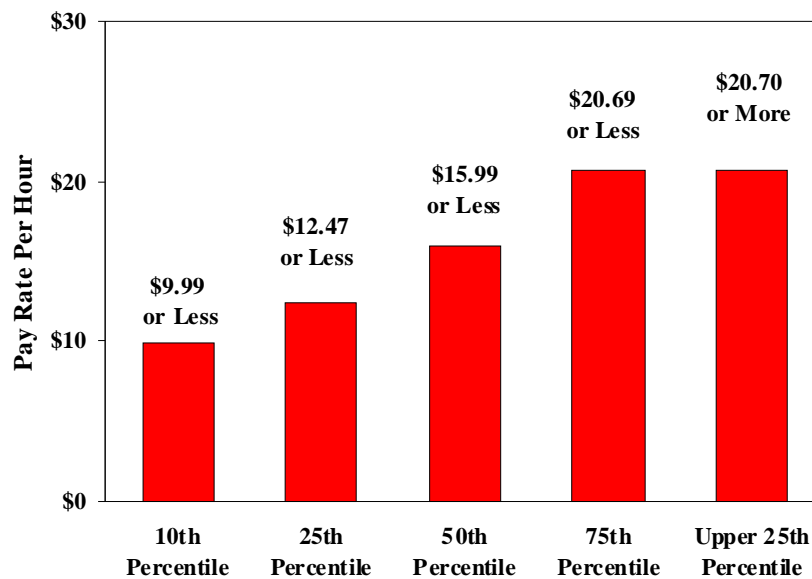
<u>\$7.99 or Less</u> 50	<u>\$8.00 - \$8.99</u> 300	<u>\$9.00 - \$9.99</u> 200	<u>\$10.00 - \$10.99</u> 400	<u>\$11.00 - \$11.99</u> 100
<u>\$12.00 - \$12.99</u> 700	<u>\$13.00 - \$13.99</u> 300	<u>\$14.00 - \$14.99</u> 400	<u>\$15.00 - \$15.99</u> 300	<u>\$16.00 - \$16.99</u> 300
<u>\$17.00 - \$17.99</u> 400	<u>\$18.00 - \$18.99</u> 200	<u>\$19.00 - \$19.99</u> 200	<u>\$20.00 - \$20.99</u> 400	<u>\$21.00 - \$21.99</u> 50
<u>\$22.00 - \$22.99</u> 200	<u>\$23.00 - \$23.99</u> 50	<u>\$24.00 - \$24.99</u> 50	<u>\$25.00 - \$25.99</u> 200	<u>\$26.00 - \$26.99</u> 100
<u>\$27.00 - \$27.99</u> 50	<u>\$28.00 - \$28.99</u> 50	<u>\$29.00 - \$29.99</u> 50	<u>\$30.00 - \$30.99</u> 50	<u>\$31.00 or More</u> 400



Utilizing the desired wage information as illustrated in the preceding charts, the following conclusions can be drawn concerning the underemployed workers in Flagler County:

- 10% of the underemployed workers will require \$9.99 per hour or less to change jobs.
- 25% of the underemployed workers will require \$12.47 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 \$20.69 per hour or less to change jobs.
- The upper 25% of the underemployed workers will require wages beginning at \$20.70 per hour and extending upward to over \$30.00 per hour. These are the most qualified and experienced workers.

DESIRED WAGE RATES BY PERCENTILE

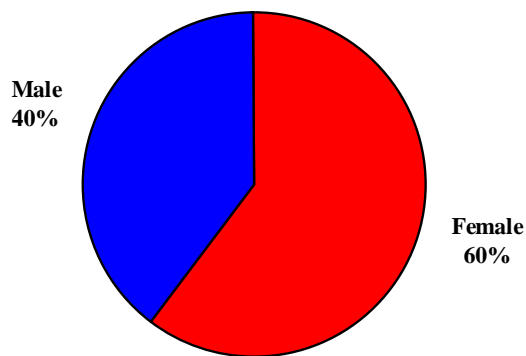


CHARACTERISTICS OF UNDEREMPLOYED WORKERS

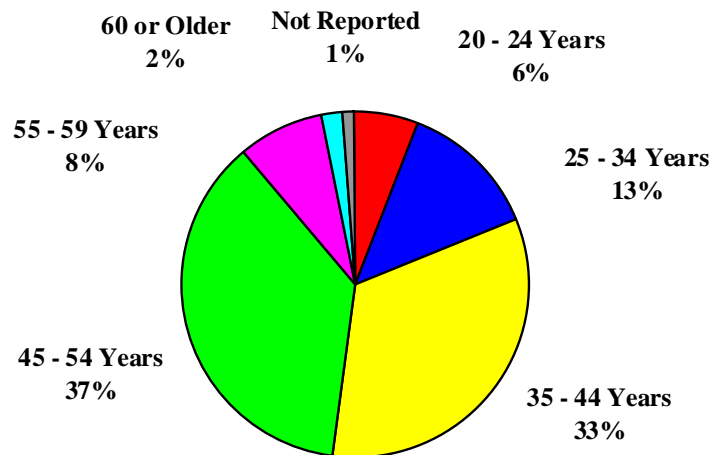
The Flagler County Labor Shed

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

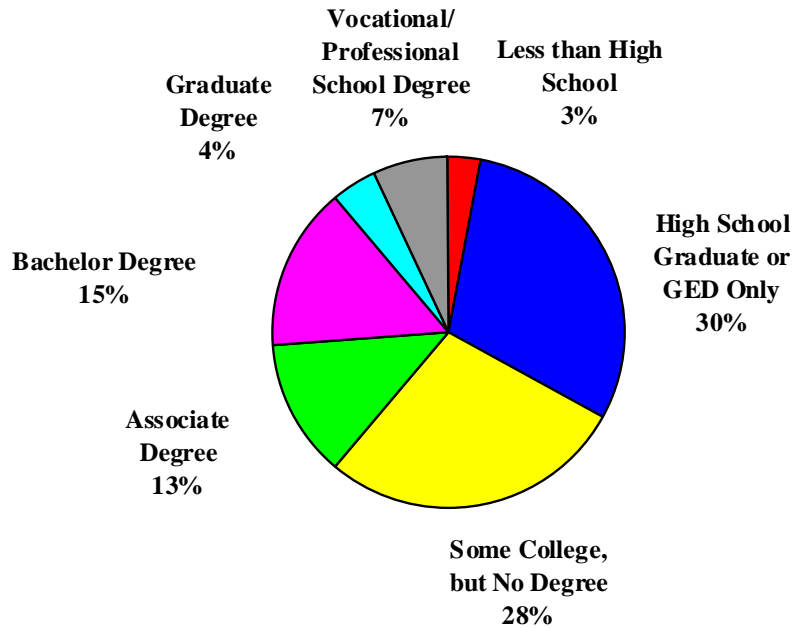


UNDEREMPLOYED WORKERS - AGE

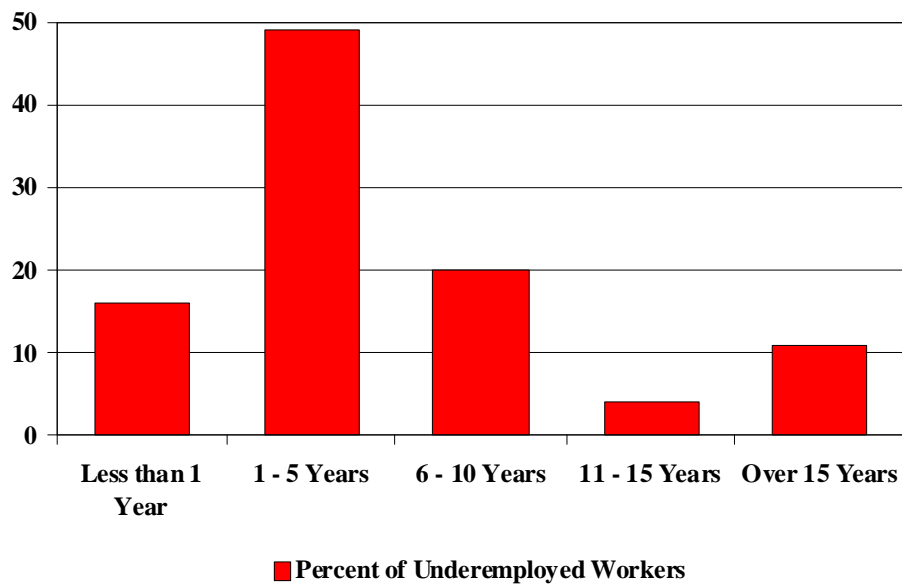


CHARACTERISTICS OF UNDEREMPLOYED WORKERS

EDUCATION

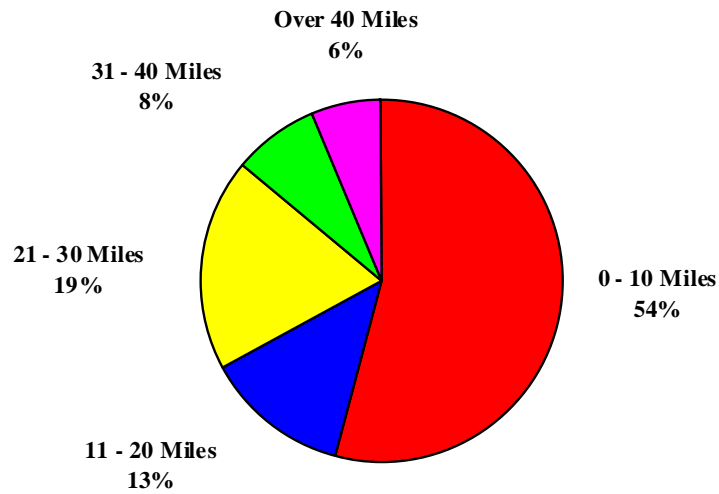


LENGTH OF TIME IN CURRENT JOB

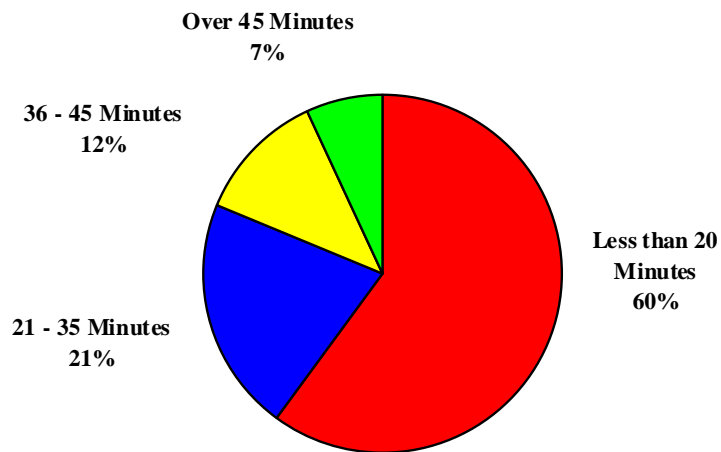


CHARACTERISTICS OF UNDEREMPLOYED WORKERS

CURRENT COMMUTE DISTANCE

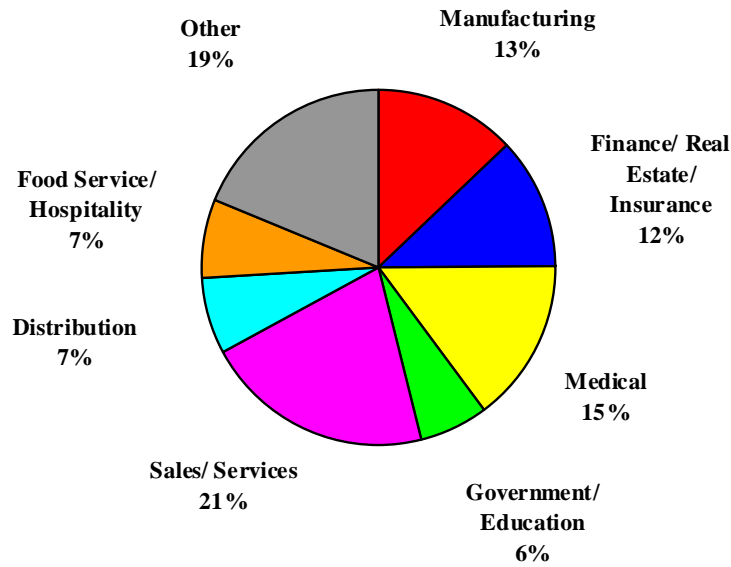


CURRENT COMMUTE TIME

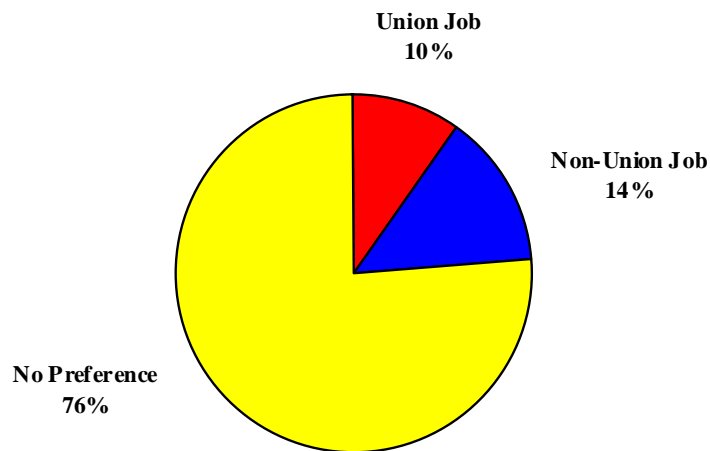


CHARACTERISTICS OF UNDEREMPLOYED WORKERS

CURRENT SECTOR OF EMPLOYMENT



UNION PREFERENCE



EXPERIENCE AND SKILLS – UNDEREMPLOYED WORKERS

The Flagler County 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 Flagler County Labor Shed****5,500 Underemployed Workers**

Experience Category*	Total Number of Persons Experienced**	Percentage of Total Underemployed	Average Number of Years of Experience
Customer Service	4,300	78%	12
Office Operations	4,200	76%	12
Sales	3,000	54%	6
Information Technology	2,400	43%	9
Warehouse/Distribution/Transportation	2,200	40%	6
Manufacturing/Assembly/Fabrication	2,100	38%	9
Telecommunications	2,000	37%	7
Maintenance/Installation/Repair	1,800	33%	9
Medical/Health Sciences	1,500	28%	10
Call Center	1,300	24%	4

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

** Rounded



EMPLOYMENT SKILLS OF UNDEREMPLOYED WORKERS**The Flagler County Labor Shed****5,500 Underemployed Workers**

Skills*	Total Number of Persons Skilled**	Percentage of Total Underemployed
Office Operations	4,200	76%
Information Technology	2,600	48%
Technician/Quality Assurance	2,500	46%
Telecommunications	2,500	45%
Warehouse/Materials Handling	2,400	44%
Manufacturing/Assembly/Fabrication	2,100	39%
Maintenance/Installation/Repair	1,800	32%
Medical/Health Sciences	1,700	31%
Electronics/Engineering	1,300	24%

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

** Rounded



FACTORS AFFECTING JOB DESIRABILITY

The Flagler County Labor Shed

5,500 Underemployed Workers

In an effort to identify those factors most important to Flagler County’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	59%	31%	8%	1%	1%
Location	46%	31%	16%	3%	4%
Insurance Benefits	54%	31%	11%	1%	3%
Retirement Benefits	58%	26%	14%	1%	1%
Physical Working Environment	29%	40%	24%	2%	5%
Paid Training Programs	44%	32%	18%	3%	3%
Flexible Work Schedule	38%	30%	20%	10%	2%
Opportunity for Advancement	52%	32%	11%	4%	1%
Financial Stability of the Company	72%	19%	4%	2%	3%
Reputation of the Company	52%	28%	14%	4%	2%



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 Flagler County consider paid training programs to be unimportant in their evaluation of new job opportunities.

Factor	Extremely Important
Financial Stability of the Company	72%
Salary	59%
Retirement Benefits	58%
Insurance Benefits	54%
Reputation of the Company	52%
Opportunity for Advancement	52%
Location	46%
Paid Training Programs	44%
Flexible Work Schedule	38%
Physical Working Environment	29%



INTEREST IN TRAINING COURSES

The Flagler County Labor Shed 5,500 Underemployed Workers

A component was added to this survey which was designed to determine possible interest in training courses on the part of the underemployed workers in the Flagler County workforce. In the table that follows, it should be noted that many of the respondents indicated interest in more than one program, therefore, the percent total will not equal 100.

Type of Training Course	Number of Persons	Percentage
Computer Software Applications	2,300	41%
Computer Programming	2,300	41%
Human Resources	1,800	33%
Computer Maintenance or Repair	1,500	27%
Health Care	1,200	21%
Real Estate or Insurance	800	14%
Industrial Machine Operations	700	13%
Auto or Maintenance Mechanics	600	11%
Food Service/Hospitality	600	11%
Restaurant/Retail Management	600	11%
Technical Trades	600	10%
Construction Trades	500	9%
Commercial Vehicle Operations	400	8%
ESL	200	4%
GED or Basic Reading, Writing, Arithmetic	200	4%



EMPLOYERS' VIEWS OF THE THE FLAGLER/VOLUSIA COUNTY AREA TOTAL WORKFORCE

In developing a profile of existing workers in the Flagler/Volusia County 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 tables below reflect the top three methods used to recruit hourly and salaried workers in the Flagler/Volusia County region and the percent of employers utilizing each method. Many use more than one method, therefore, the percentages will not add up to 100%.

Recruiting Method – Hourly Workers	% of Employers
Newspaper Ads	75%
Internet	36%
Word of Mouth	29%

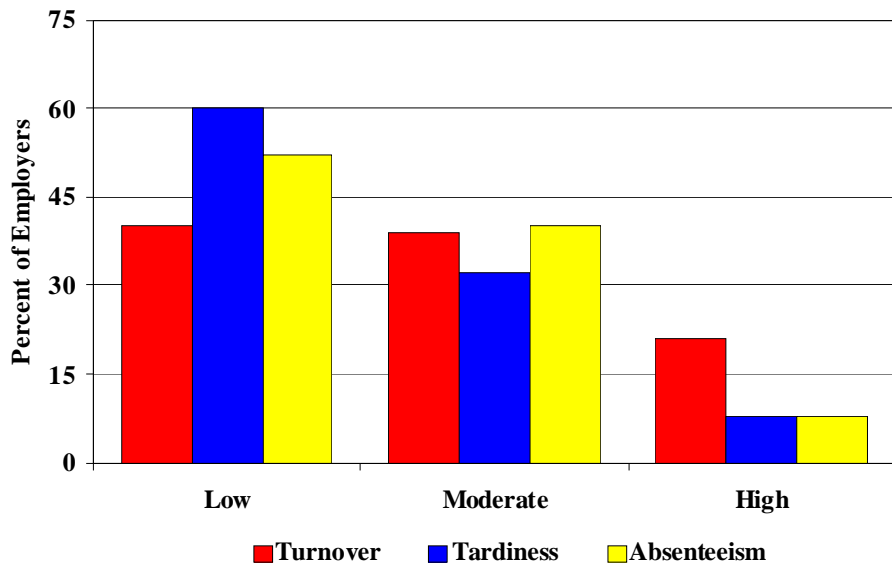
Recruiting Method – Salaried Workers	% of Employers
Internet	68%
Newspaper Ads	46%
Referrals	14%



43% of the employers interviewed stated their companies had operations in other regions of the United States. Of these employers, those familiar with the workforces in those other locations reported that their Flagler/Volusia County area operations were comparable to or better than the other regions 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 Flagler/Volusia County region.

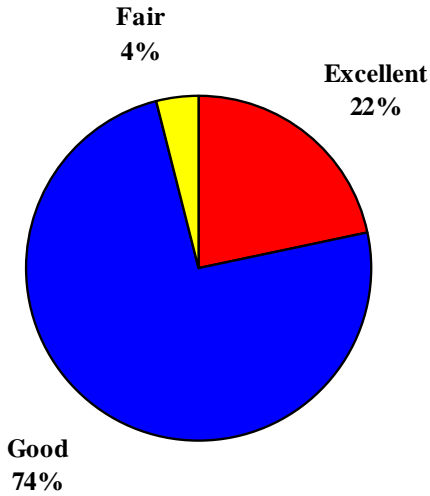
**PERCENT OF EMPLOYERS RATING
THE FLAGLER/VOLUSIA COUNTY AREA TOTAL WORKFORCE**



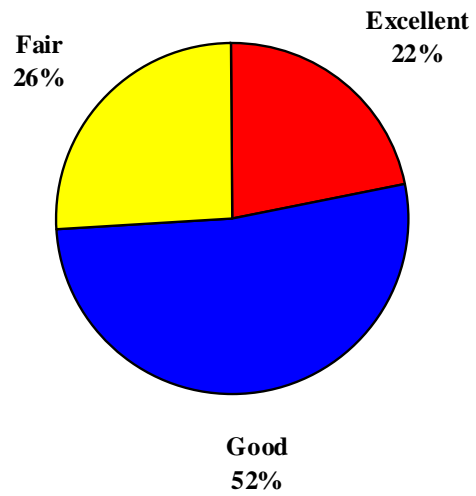
Additionally, in the Flagler/Volusia County region, 93% of the employers interviewed stated their companies tested for substance abuse, primarily pre-employment. Substance abuse within the individual companies’ workforces was reported as very low.

In consideration of all factors, 96% of the employers in the Flagler/Volusia County area rated the productivity of the workforce as “Good” to “Excellent”. Worker attitudes received high marks from 89% of the employers.

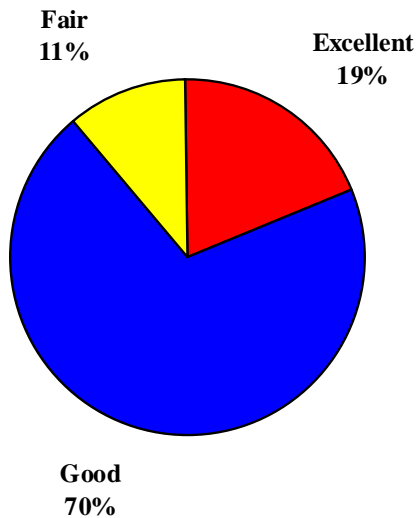
WORKER PRODUCTIVITY



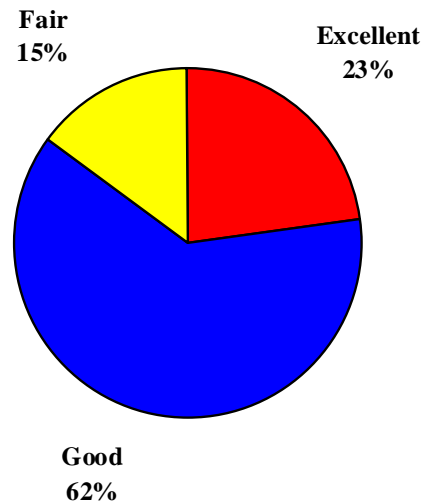
WORKER RELIABILITY



WORKER ATTITUDES

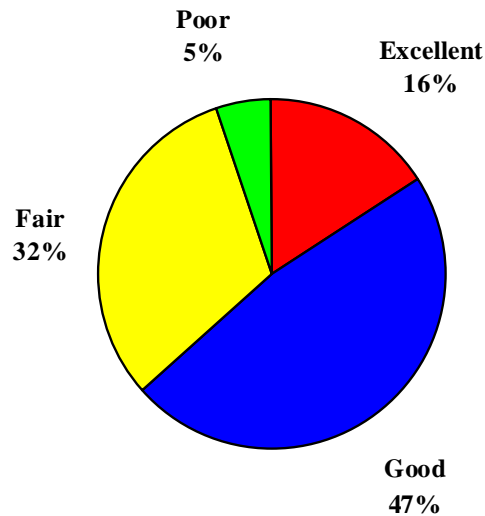


WORKER TEAMWORK SKILLS

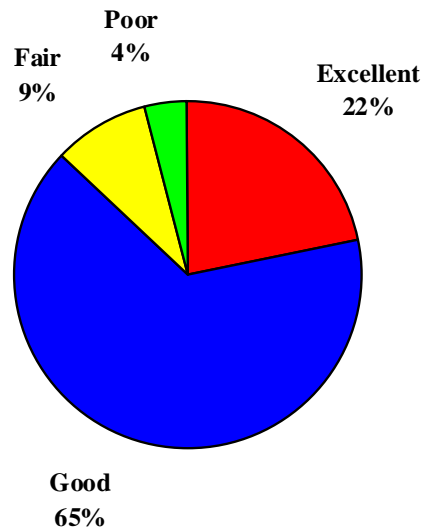


The educational competencies of employees are additional factors used to evaluate an area’s labor force. In the Flagler/Volusia County area, 63% of the employers interviewed rated the local public schools as “Excellent” or “Good”, and 87% of the employers rated the local community colleges and technical schools as “Excellent” or “Good”.

LOCAL PUBLIC SCHOOLS

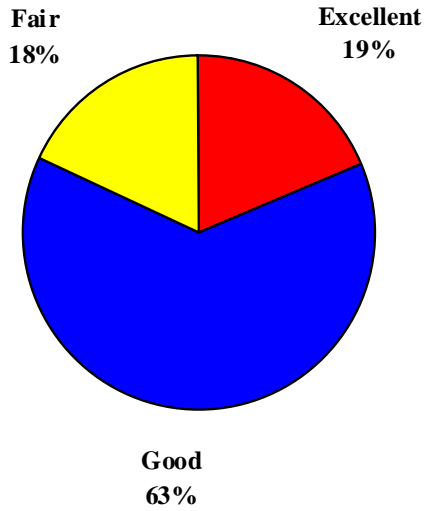


LOCAL COMMUNITY COLLEGES AND TECH SCHOOLS

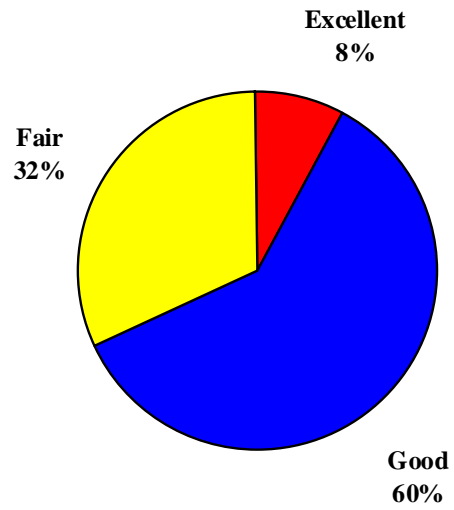


Further, employers gave the following ratings to their employees relative to competency in basic skills and entry level skills.

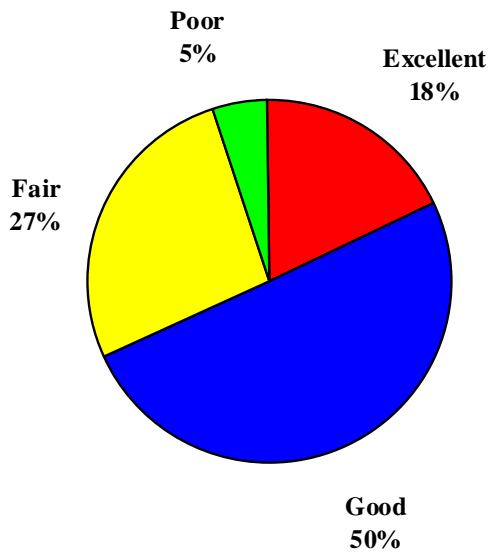
READING SKILLS



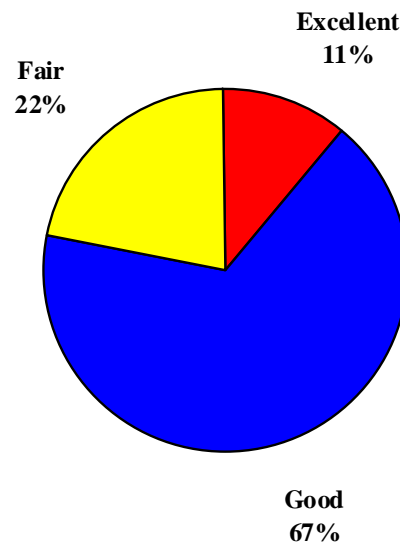
WRITING SKILLS



MATH SKILLS

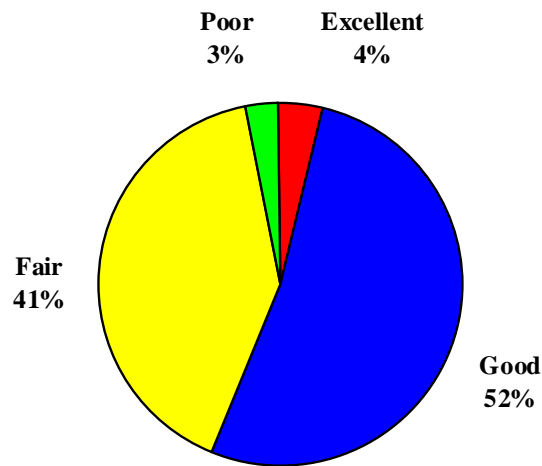


ENTRY LEVEL SKILLS

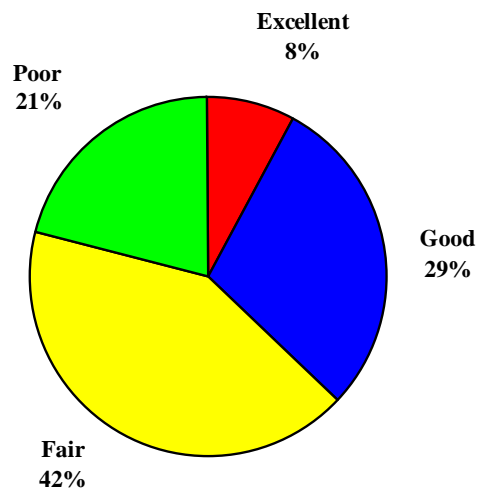


A common employer complaint relates to the shortage of skilled and technical workers. These workers are in great demand and difficult to find in the vast majority of locations. Of the companies in the labor shed interviewed, 56% considered skilled worker availability to be “Excellent” or “Good”, while 41% considered it to be “Fair”. The availability of technical workers in the labor shed was rated “Excellent” or “Good” by 37% of the interviewed companies and “Fair” by 42%.

SKILLED WORKERS AVAILABILITY

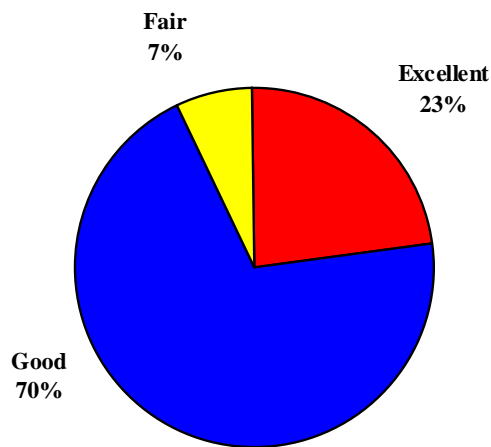


TECHNICAL WORKERS AVAILABILITY

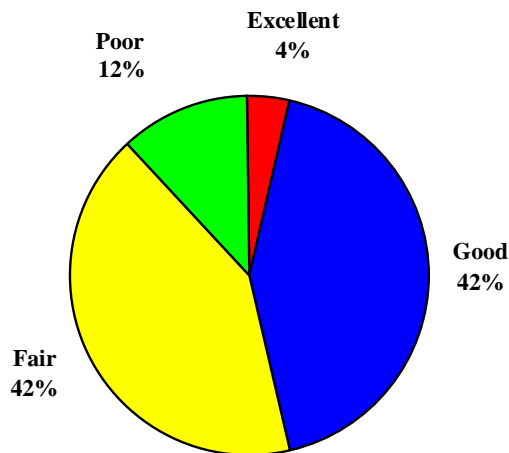


Although in most locations the availability of unskilled labor is sufficient, the availability of professional workers is often akin to that of skilled and technical workers, wherein the supply is not available to meet the demand. Of the companies in the labor shed interviewed, 93% considered unskilled worker availability to be “Excellent” or “Good”, while 7% considered it to be “Fair”. The availability of professional workers in the labor shed was rated “Excellent” or “Good” by 46% of the interviewed companies and “Fair” by 42%.

UNSKILLED WORKERS AVAILABILITY



PROFESSIONAL WORKERS AVAILABILITY



COMPARISONS OF EMPLOYERS RATINGS
TOTAL WORKFORCE
The Flagler/Volusia County 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.

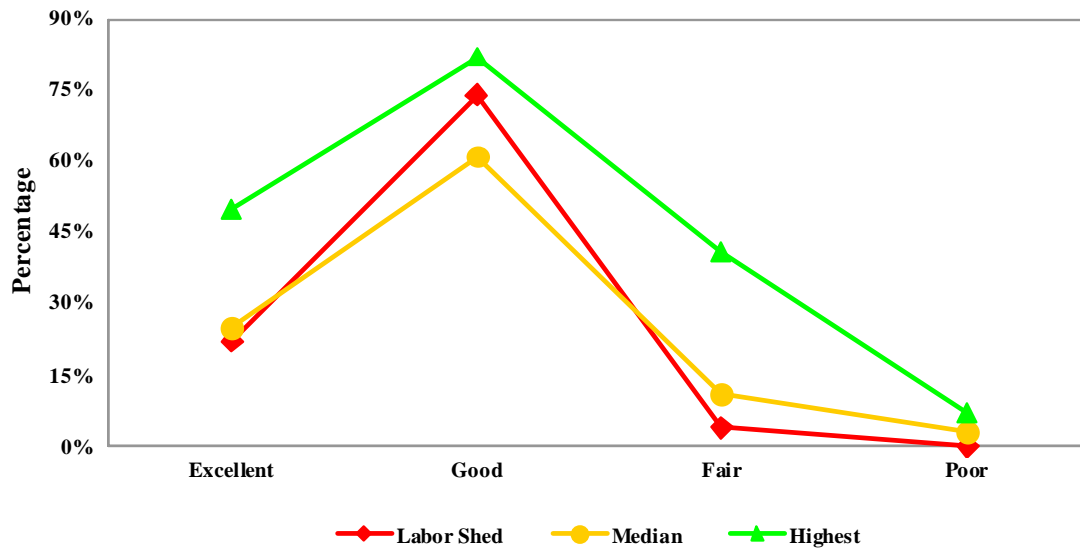
The following charts present the comparative results for each factor. They compare the percentages of the Flagler/Volusia County area employers who rated their workers “Excellent”, “Good”, “Fair”, or “Poor” on each factor with the “Highest” rating of that factor in all areas surveyed in the last eighteen 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, 22% of the Flagler/Volusia County 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 Flagler/Volusia County area is shown as “Labor Shed”.

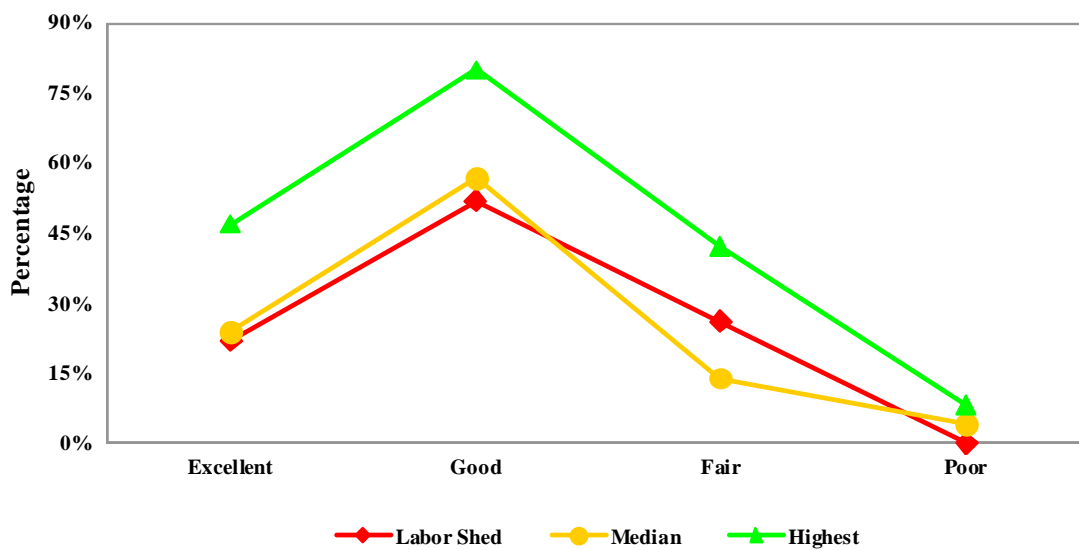


COMPARISON OF EMPLOYER RATINGS
The Flagler/Volusia County Area /
Locations Surveyed Over the Past 18 Months

Worker Productivity



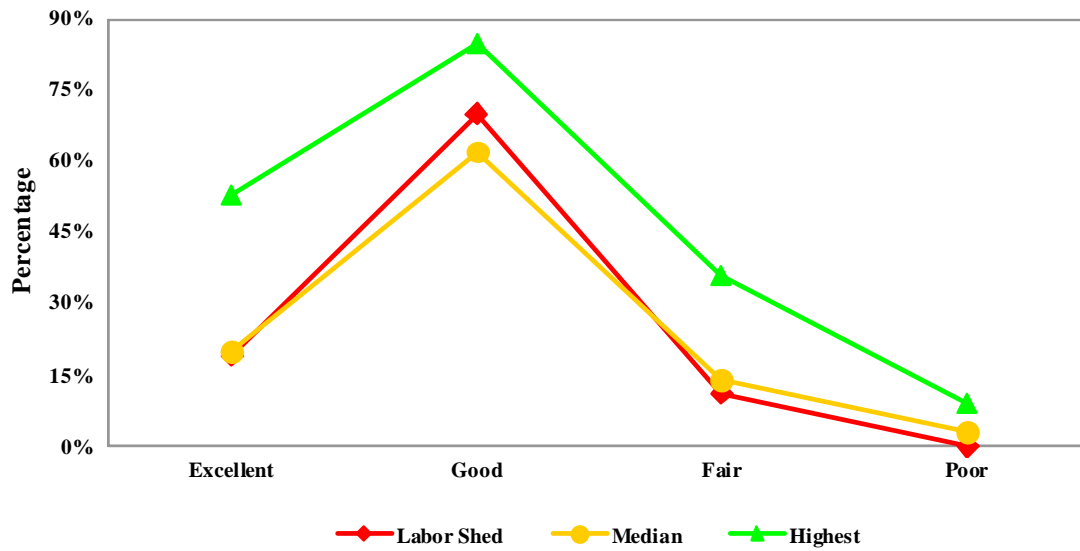
Worker Reliability



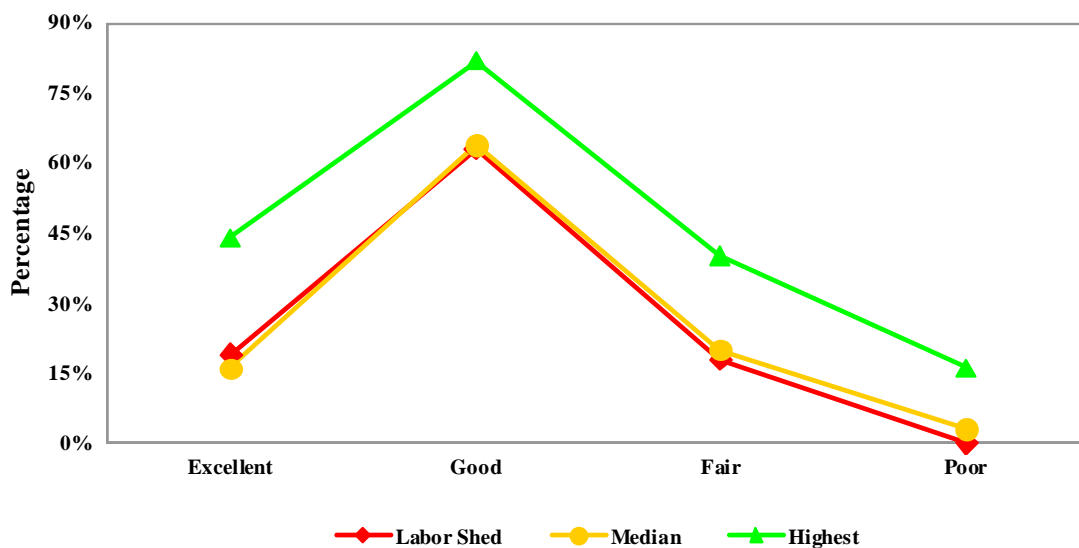
COMPARISON OF EMPLOYER RATINGS

The Flagler/Volusia County Area / Locations Surveyed Over the Past 18 Months

Worker Attitudes



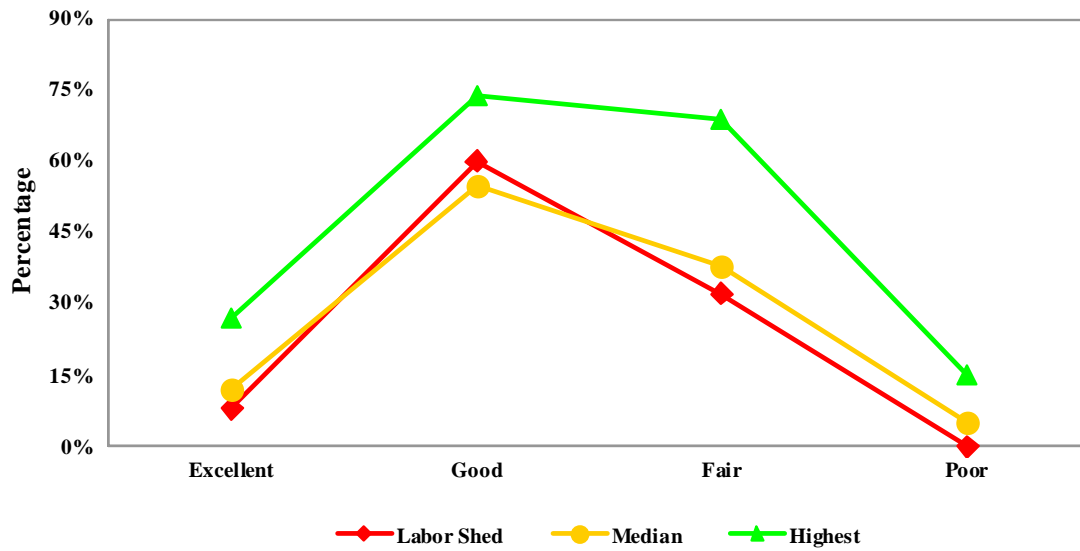
Worker Reading Competency



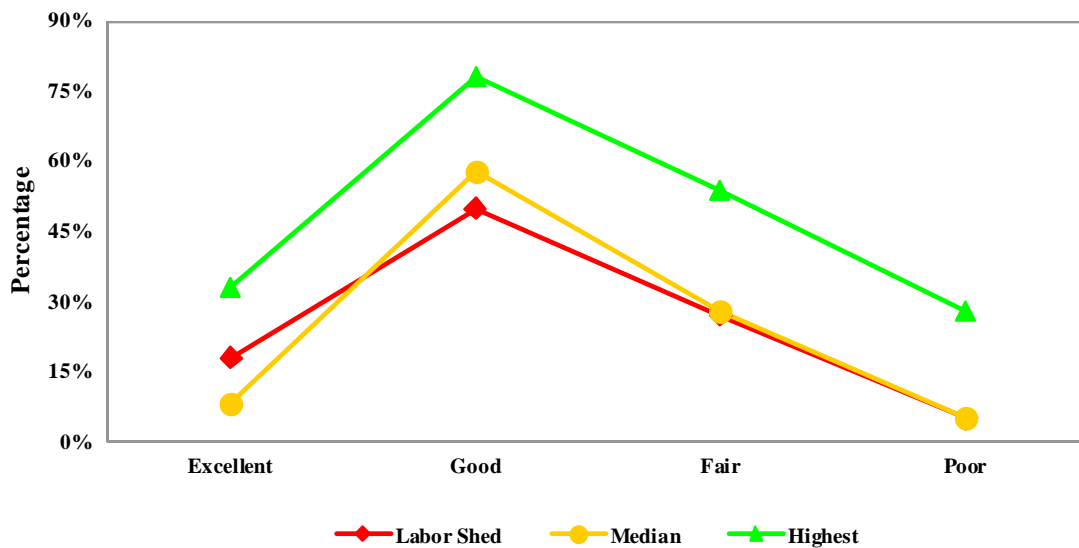
COMPARISON OF EMPLOYER RATINGS

The Flagler/Volusia County Area / Locations Surveyed Over the Past 18 Months

Worker Writing Competency



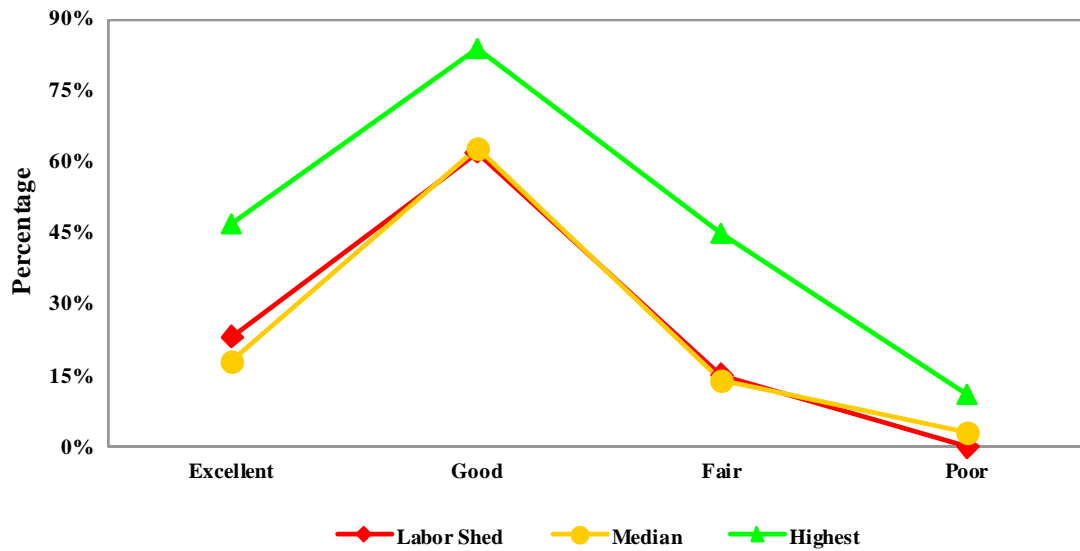
Worker Calculations Competency



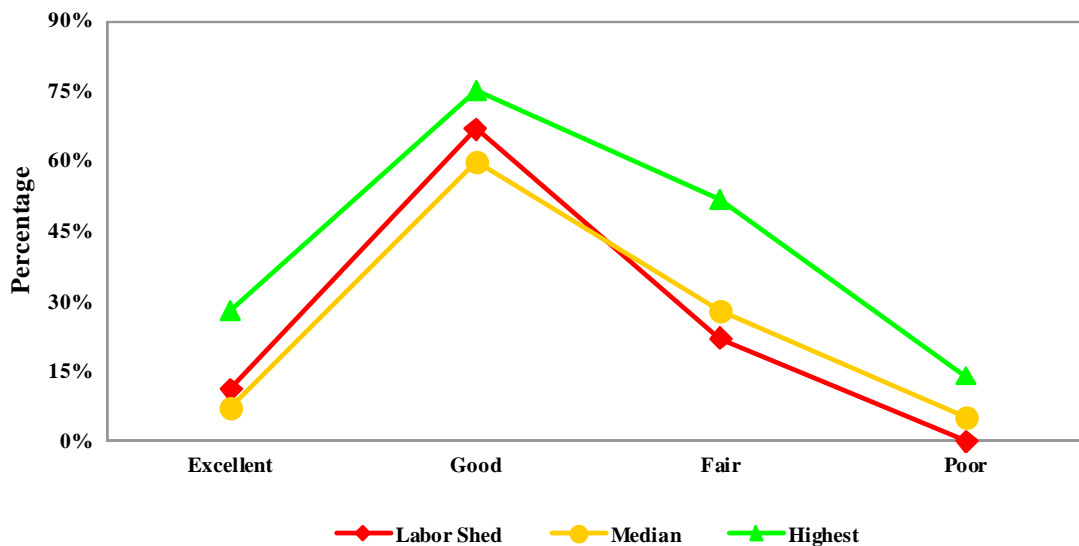
COMPARISON OF EMPLOYER RATINGS

The Flagler/Volusia County Area / Locations Surveyed Over the Past 18 Months

Worker Teamwork Skills



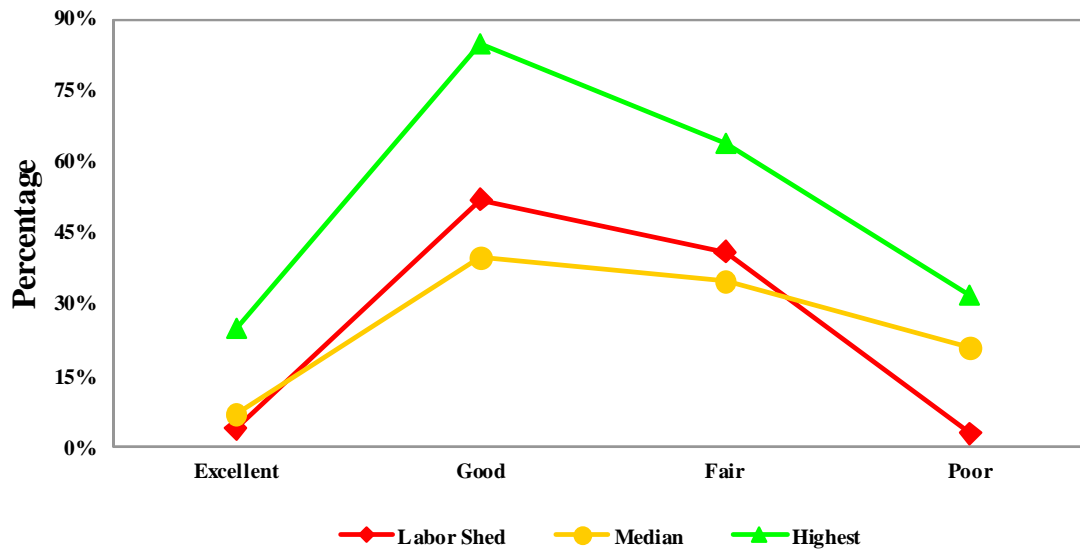
Worker Entry Level Skills



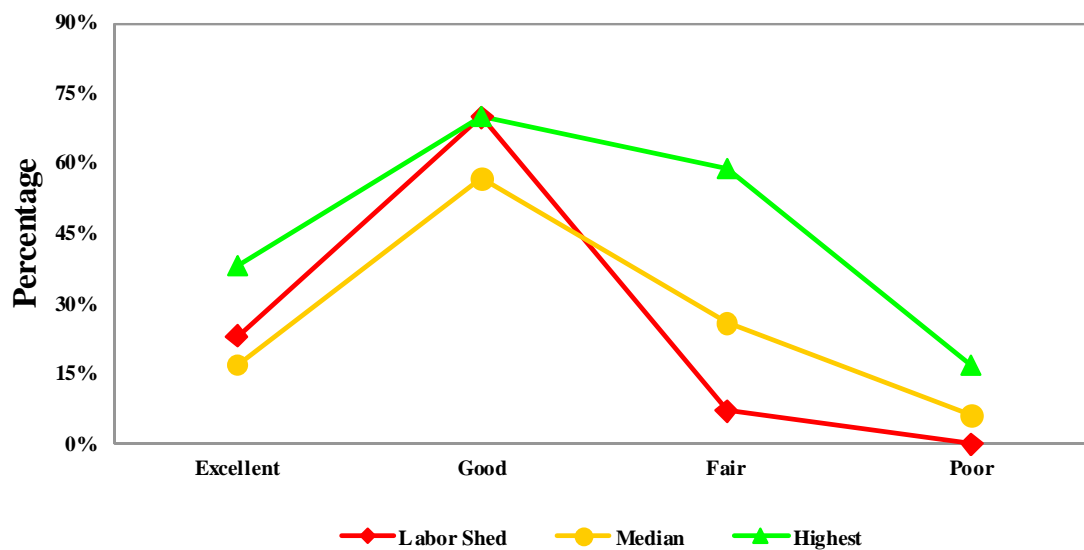
COMPARISON OF EMPLOYER RATINGS

The Flagler/Volusia County Area / Locations Surveyed Over the Past 18 Months

Availability of Skilled Workers



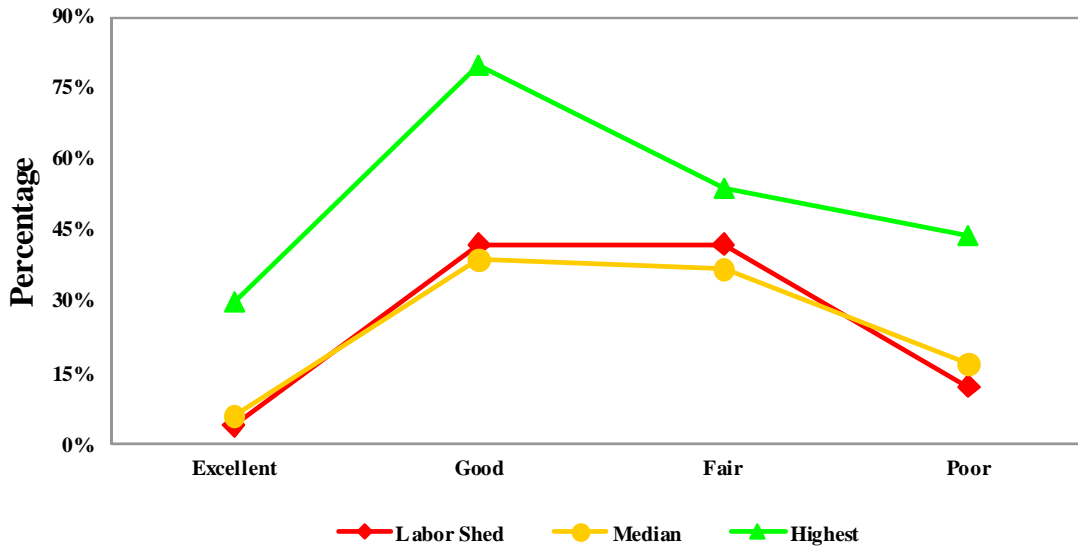
Availability of Unskilled Workers



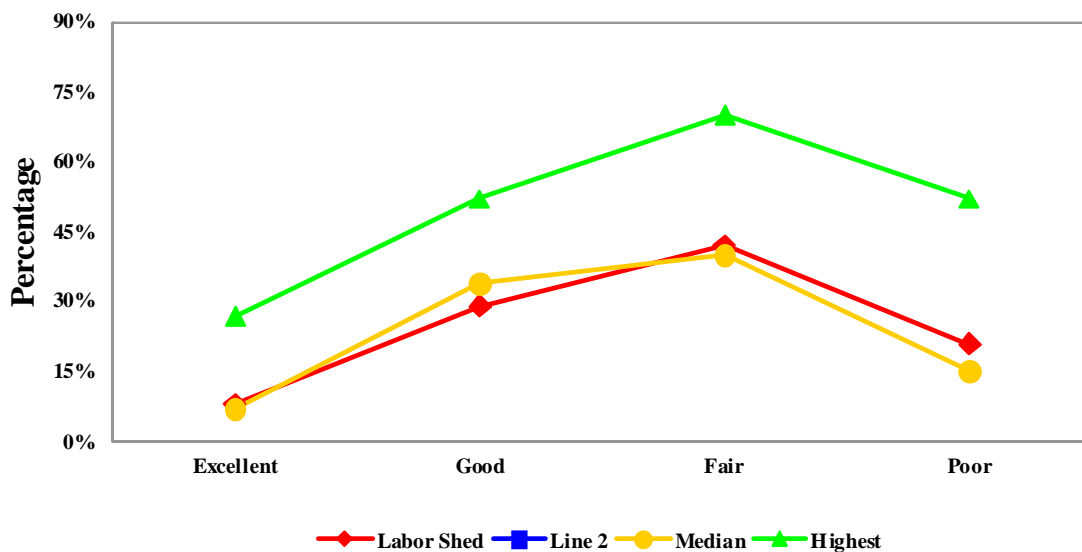
COMPARISON OF EMPLOYER RATINGS

The Flagler/Volusia County Area / Locations Surveyed Over the Past 18 Months

Availability of Professional Workers



Availability of Technical Workers



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 Flagler County 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 Flagler County, 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 Flagler County. 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 Flagler County 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)

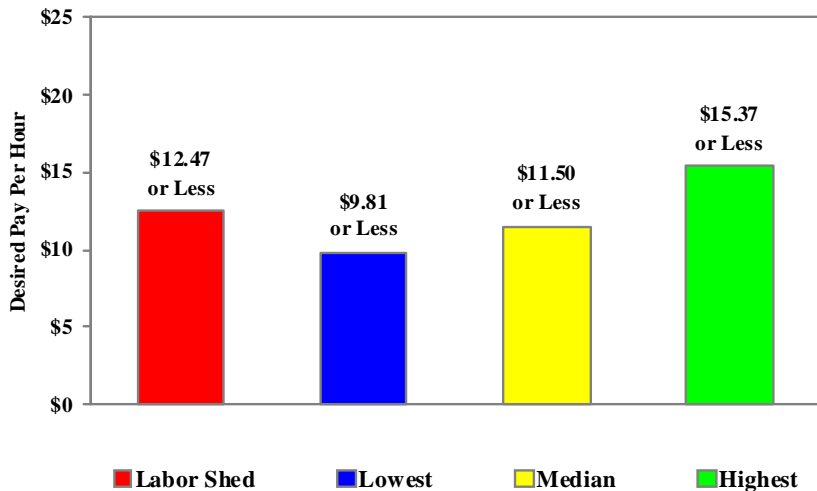
In the various charts which follow this page, this labor shed is compared with others for the purpose of making the data meaningful. In the charts, figures for this labor shed are shown alongside the “lowest”, “median” and “highest” figures from other workforce surveys conducted by The Pathfinders. The 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



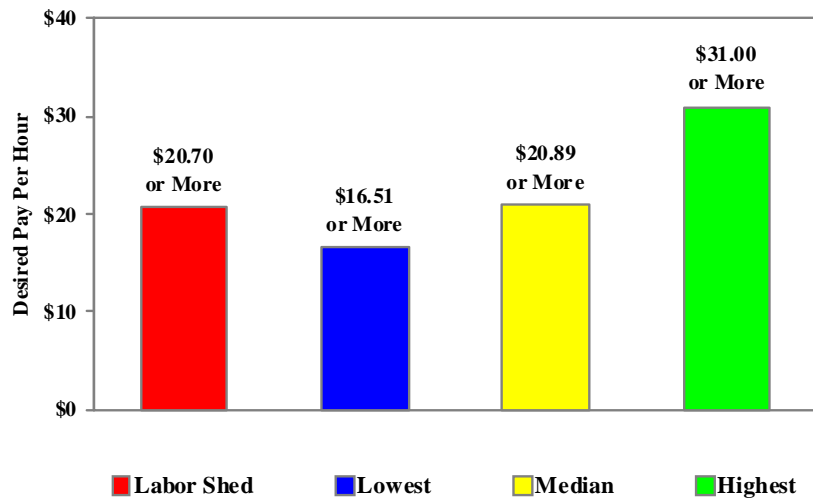
The workforce report documented the number of underemployed workers in the labor shed who would be available for an employer at various pay rates ranging from \$8.00 per hour or below to \$25.00 per hour or above and who appear to have the skills, experience, and education to justify the desired pay rates. The chart below shows that 25% (lower quartile) of the underemployed workers in the labor shed would take a new job for \$12.47 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 \$9.81 per hour or less, the median \$11.50 or less, and the highest desired pay rate was \$15.37 per hour or less.

**COMPARISON OF DESIRED WAGES (per hour)
UNDEREMPLOYED WORKERS - LOWER QUARTILE
The Flagler County Labor Shed /
Locations Surveyed Over the Past 18 Months**



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 \$20.70 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 \$16.51 or more, the median \$20.89 or more, and the highest was \$31.00 per hour or more.

**COMPARISON OF DESIRED WAGES (per hour)
UNDEREMPLOYED WORKERS - UPPER QUARTILE
The Flagler County Labor Shed /
Locations Surveyed Over the Past 18 Months**



The following charts compare the percentages of underemployed workers in Flagler County 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, Flagler County is referred to as “labor shed”.

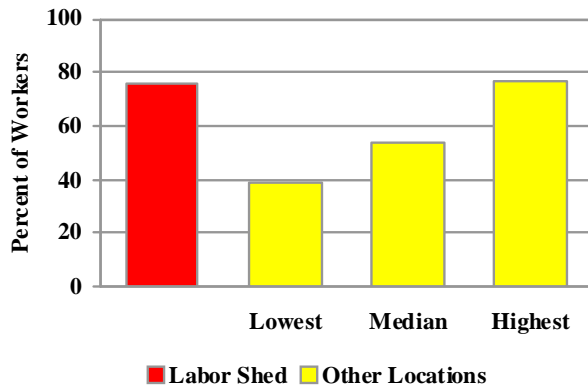
The experience charts are followed by skills charts, which compare the percentages of underemployed workers in Flagler County who possess various types of employment skills with the percentages of underemployed workers in locations surveyed over the past eighteen months who possess the same skills. In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



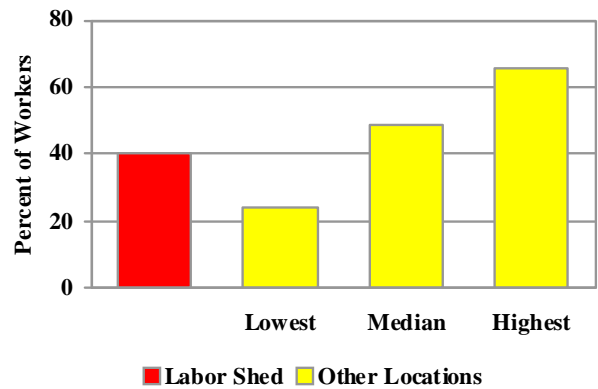
**COMPARISON OF EXPERIENCE
UNDEREMPLOYED WORKERS**

**The Flagler County Labor Shed /
Locations Surveyed Over the Past 18 Months**

OFFICE



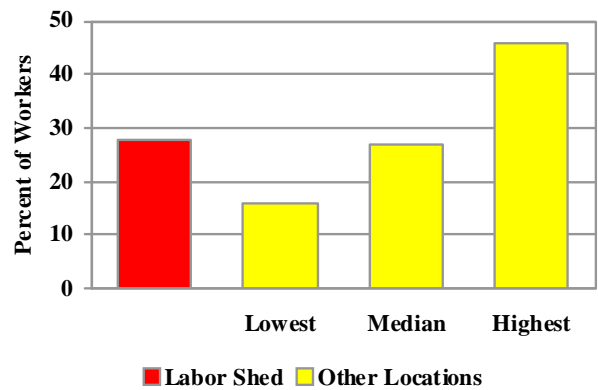
**WAREHOUSE / DISTRIBUTION /
TRANSPORTATION**



**MANUFACTURING / ASSEMBLY /
FABRICATION**



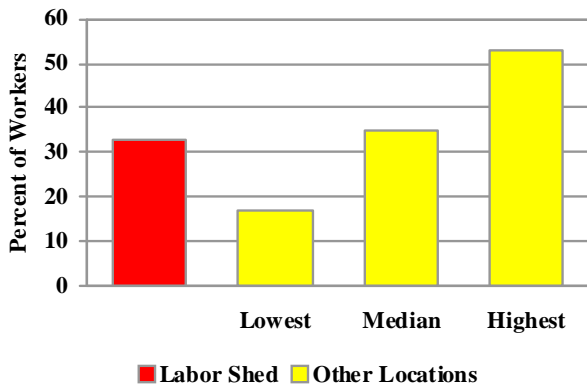
**MEDICAL /
HEALTH SCIENCES**



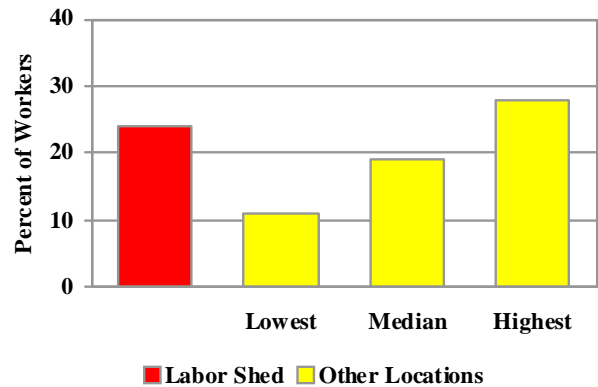
**COMPARISON OF EXPERIENCE
UNDEREMPLOYED WORKERS**

**The Flagler County Labor Shed /
Locations Surveyed Over the Past 18 Months**

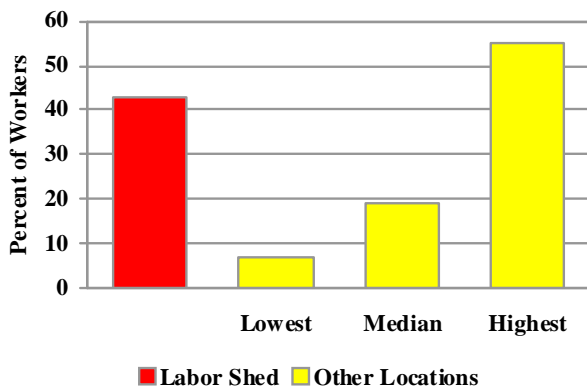
**MAINTENANCE /
INSTALLATION / REPAIR**



CALL CENTER



INFORMATION TECHNOLOGY



CUSTOMER SERVICE

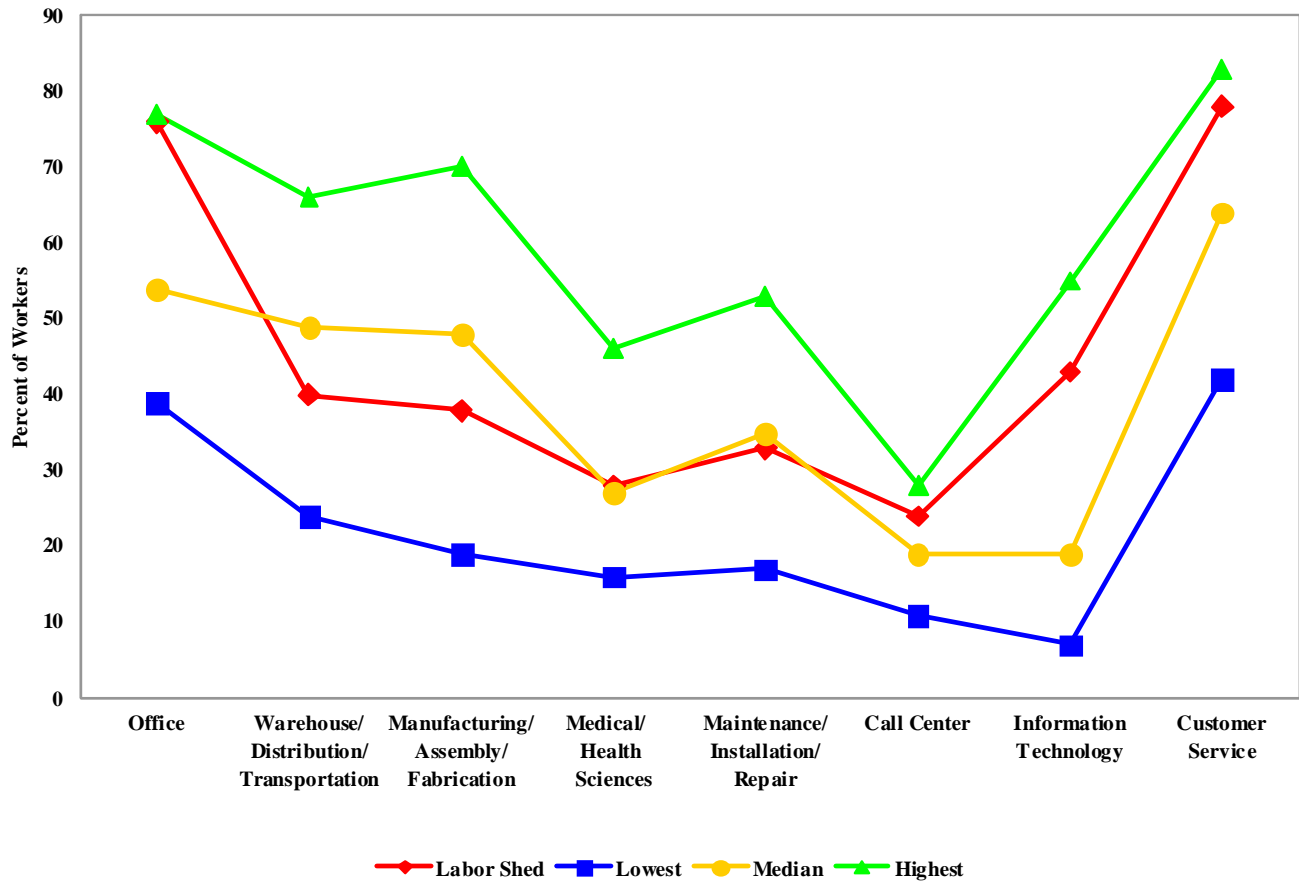


SUMMARY COMPARISON OF EXPERIENCE

UNDEREMPLOYED WORKERS

The Flagler County Labor Shed/

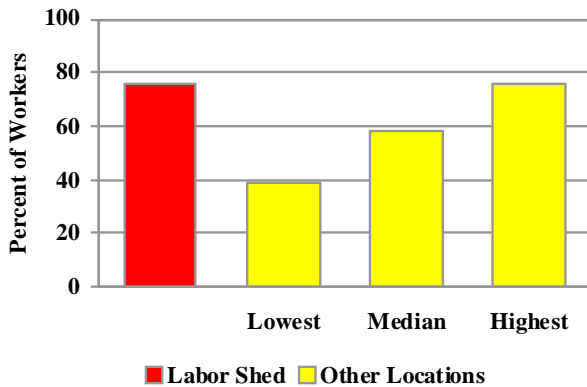
Locations Surveyed Over the Past 18 Months



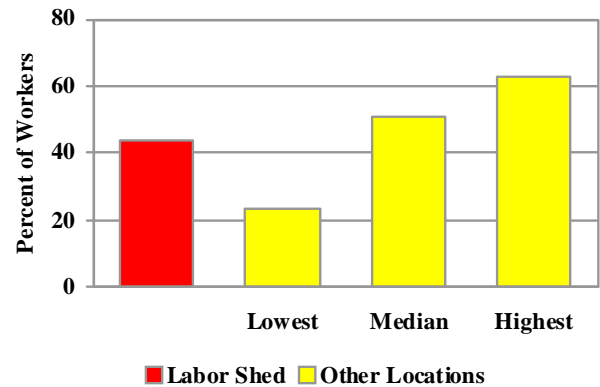
**COMPARISON OF SKILLS
UNDEREMPLOYED WORKERS**

**The Flagler County Labor Shed /
Locations Surveyed Over the Past 18 Months**

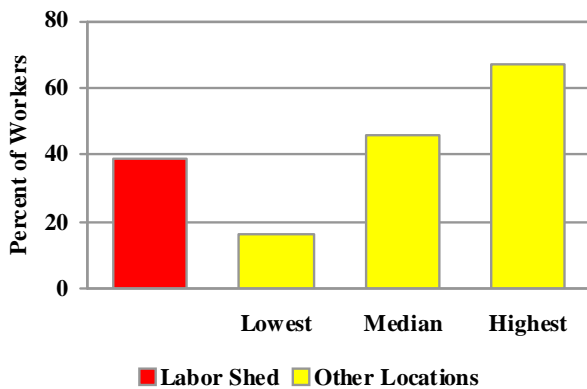
OFFICE



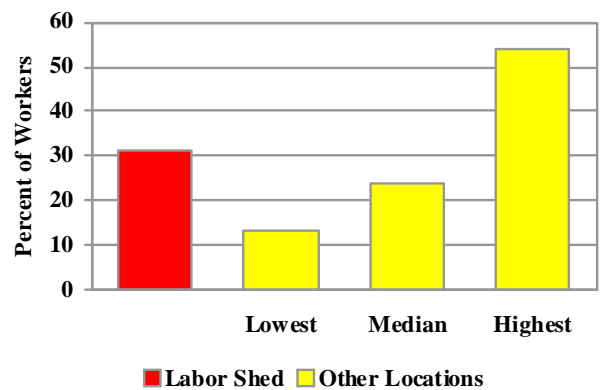
**WAREHOUSE / MATERIALS
HANDLING**



**MANUFACTURING / ASSEMBLY /
FABRICATION**



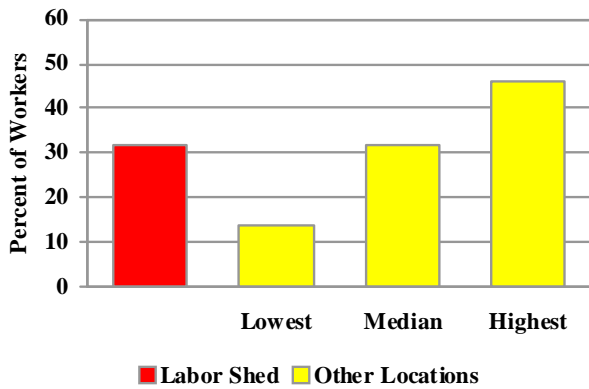
**MEDICAL /
HEALTH SCIENCES**



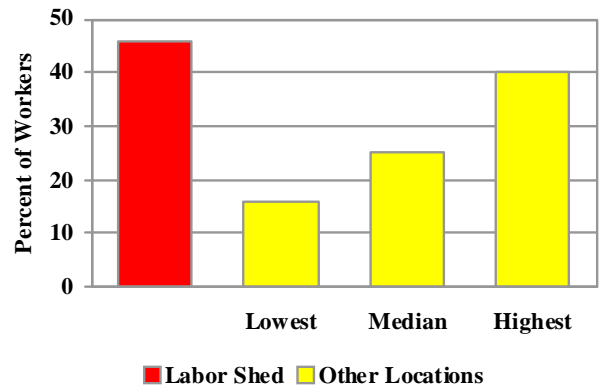
**COMPARISON OF SKILLS
UNDEREMPLOYED WORKERS**

**The Flagler County Labor Shed /
Locations Surveyed Over the Past 18 Months**

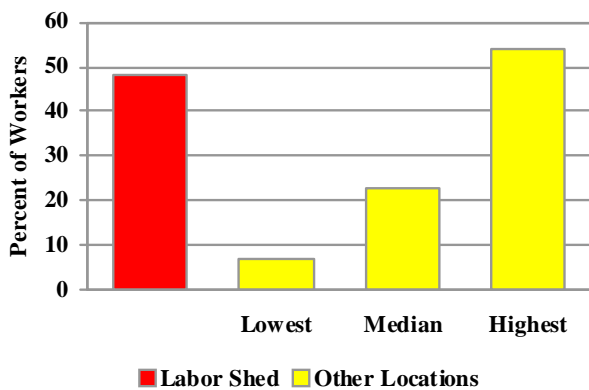
**MAINTENANCE /
INSTALLATION / REPAIR**



**TECHNICIAN / QUALITY
ASSURANCE**



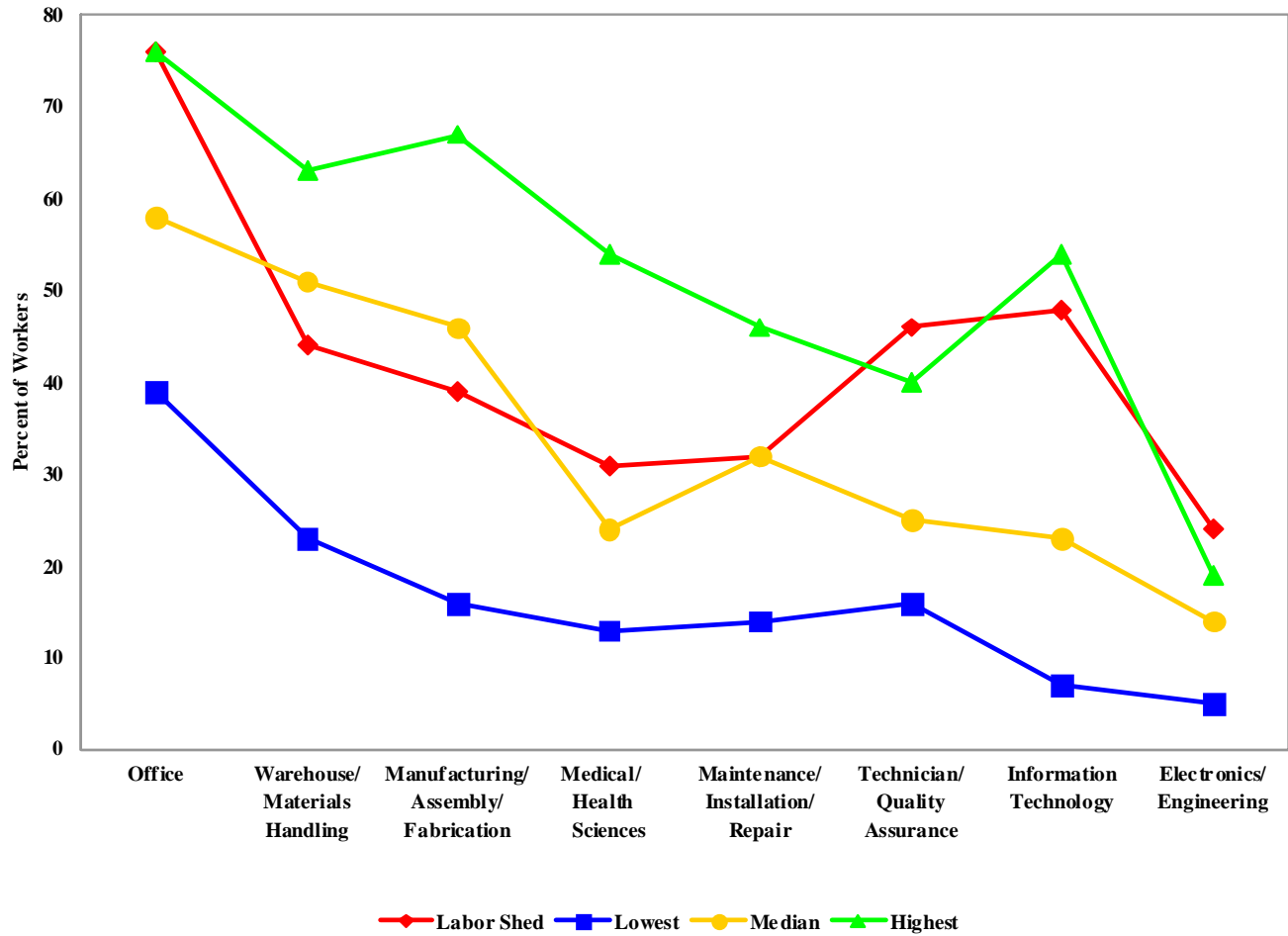
INFORMATION TECHNOLOGY



ELECTRONICS / ENGINEERING



**SUMMARY COMPARISON OF SKILLS
UNDEREMPLOYED WORKERS
The Flagler County Labor Shed /
Locations Surveyed Over the Past 18 Months**



CLOSING REMARKS

The foregoing report represents an assessment of the underemployment that exists in Flagler County. 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 Flagler/Volusia County 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 Flagler County, 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 Flagler County Civilian Workforce	31,900
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



SUPPLEMENTAL SECTION

This supplemental section of the report shows the skills and desired pay of the underemployed workers in Flagler County by their current experience.

As stated earlier, the experience and skills categories are purposefully similar in order to present the most accurate picture of worker availability. 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.

With respect to desired pay rates, there is no single, identifiable pattern in the amount of pay increase desired by workers who indicated a desire to change or upgrade their job status. Some would make a level move while some would accept less pay than their current rate. Most specified a reasonable pay increase, and those specifying unreasonable increases were eliminated from consideration.

The skills by current experience section provides data that suggest a reservoir of underutilized skills that may be tapped in order to satisfy the needs of expanding and new employers in a diversity of fields.



**DESIRED PAY RATES OF UNDEREMPLOYED WORKERS
IN FLAGLER COUNTY
WHOSE CURRENT EXPERIENCE IS IN:**

OFFICE OPERATIONS							
Desired Pay Per Hour	\$10.99 or Less	\$11.00 - \$13.99	\$14.00 - \$16.99	\$17.00 - \$19.99	\$20.00 - \$24.99	\$25.00 - \$30.99	\$31.00 or More
Percentage of Workers	11%	23%	17%	11%	12%	14%	12%

WAREHOUSE / DISTRIBUTION / TRANSPORTATION							
Desired Pay Per Hour	\$10.99 or Less	\$11.00 - \$13.99	\$14.00 - \$16.99	\$17.00 - \$19.99	\$20.00 - \$24.99	\$25.00 - \$30.99	\$31.00 or More
Percentage of Workers	9%	35%	9%	22%	4%	17%	4%

MANUFACTURING / ASSEMBLY / FABRICATION							
Desired Pay Per Hour	\$10.99 or Less	\$11.00 - \$13.99	\$14.00 - \$16.99	\$17.00 - \$19.99	\$20.00 - \$24.99	\$25.00 - \$30.99	\$31.00 or More
Percentage of Workers	6%	33%	17%	17%	10%	17%	-

MEDICAL / HEALTH CARE							
Desired Pay Per Hour	\$10.99 or Less	\$11.00 - \$13.99	\$14.00 - \$16.99	\$17.00 - \$19.99	\$20.00 - \$24.99	\$25.00 - \$30.99	\$31.00 or More
Percentage of Workers	6%	32%	6%	25%	19%	6%	6%



**DESIRED PAY RATES OF UNDEREMPLOYED WORKERS
IN FLAGLER COUNTY
WHOSE CURRENT EXPERIENCE IS IN:**

MAINTENANCE / INSTALLATION / REPAIR							
Desired Pay Per Hour	\$10.99 or Less	\$11.00 - \$13.99	\$14.00 - \$16.99	\$17.00 - \$19.99	\$20.00 - \$24.99	\$25.00 - \$30.99	\$31.00 or More
Percentage of Workers	-	24%	19%	28%	14%	10%	5%

CALL CENTER							
Desired Pay Per Hour	\$10.99 or Less	\$11.00 - \$13.99	\$14.00 - \$16.99	\$17.00 - \$19.99	\$20.00 - \$24.99	\$25.00 - \$30.99	\$31.00 or More
Percentage of Workers	-	33%	17%	17%	-	33%	-

INFORMATION TECHNOLOGY							
Desired Pay Per Hour	\$10.99 or Less	\$11.00 - \$13.99	\$14.00 - \$16.99	\$17.00 - \$19.99	\$20.00 - \$24.99	\$25.00 - \$30.99	\$31.00 or More
Percentage of Workers	-	29%	13%	13%	19%	10%	16%



**DESIRED PAY RATES OF UNDEREMPLOYED WORKERS
IN FLAGLER COUNTY
WHOSE CURRENT EXPERIENCE IS IN:**

SALES							
Desired Pay Per Hour	\$10.99 or Less	\$11.00 - \$13.99	\$14.00 - \$16.99	\$17.00 - \$19.99	\$20.00 - \$24.99	\$25.00 - \$30.99	\$31.00 or More
Percentage of Workers	15%	18%	18%	7%	12%	15%	15%

TELECOMMUNICATIONS							
Desired Pay Per Hour	\$10.99 or Less	\$11.00 - \$13.99	\$14.00 - \$16.99	\$17.00 - \$19.99	\$20.00 - \$24.99	\$25.00 - \$30.99	\$31.00 or More
Percentage of Workers	7%	22%	22%	8%	15%	7%	19%

CUSTOMER SERVICE							
Desired Pay Per Hour	\$10.99 or Less	\$11.00 - \$13.99	\$14.00 - \$16.99	\$17.00 - \$19.99	\$20.00 - \$24.99	\$25.00 - \$30.99	\$31.00 or More
Percentage of Workers	19%	18%	18%	10%	15%	12%	8%



CURRENT EXPERIENCE – OFFICE OPERATIONS

Among the underemployed workers in Flagler County who use office operations experience in their current jobs, the figures below show the percentages of those workers who have the specific skills listed. Those skills may or may not be utilized in their current position:

Skills	Percentage of Workers
Office Operations	97%
Information Technology	59%
Telecommunications	55%
Technician/Quality Assurance	51%
Warehouse/Materials Handling	43%
Medical/Health Sciences	40%
Manufacturing/Assembly/Fabrication	29%
Maintenance/Installation/Repair	26%
Electronics/Engineering	25%



CURRENT EXPERIENCE – WAREHOUSE / DISTRIBUTION / TRANSPORTATION

Among the underemployed workers in Flagler County who use warehouse/distribution/transportation experience in their current jobs, the figures below show the percentages of those workers who have the specific skills listed. Those skills may or may not be utilized in their current position:

Skills	Percentage of Workers
Warehouse/Materials Handling	78%
Manufacturing/Assembly/Fabrication	74%
Maintenance/Installation/Repair	65%
Office Operations	65%
Technician/Quality Assurance	65%
Information Technology	57%
Electronics/Engineering	39%
Telecommunications	35%
Medical/Health Sciences	35%



CURRENT EXPERIENCE – MANUFACTURING / ASSEMBLY / FABRICATION

Among the underemployed workers in Flagler County who use manufacturing/assembly/fabrication operations experience in their current jobs, the figures below show the percentages of those workers who have the specific skills listed. Those skills may or may not be utilized in their current position:

Skills	Percentage of Workers
Warehouse/Materials Handling	89%
Manufacturing/Assembly/Fabrication	78%
Maintenance/Installation/Repair	56%
Technician/Quality Assurance	50%
Office Operations	50%
Electronics/Engineering	39%
Telecommunications	39%
Information Technology	33%
Medical/Health Sciences	22%



CURRENT EXPERIENCE – MEDICAL / HEALTH CARE

Among the underemployed workers in Flagler County who use medical/health care experience in their current jobs, the figures below show the percentages of those workers who have the specific skills listed. Those skills may or may not be utilized in their current position:

Skills	Percentage of Workers
Medical/Health Sciences	94%
Office Operations	88%
Technician/Quality Assurance	63%
Information Technology	50%
Telecommunications	50%
Warehouse/Materials Handling	44%
Manufacturing/Assembly/Fabrication	44%
Electronics/Engineering	31%
Maintenance/Installation/Repair	19%



CURRENT EXPERIENCE – MAINTENANCE / INSTALLATION / REPAIR

Among the underemployed workers in Flagler County who use maintenance/installation/repair experience in their current jobs, the figures below show the percentages of those workers who have the specific skills listed. Those skills may or may not be utilized in their current position:

Skills	Percentage of Workers
Maintenance/Installation/Repair	91%
Warehouse/Materials Handling	76%
Manufacturing/Assembly/Fabrication	67%
Technician/Quality Assurance	67%
Office Operations	57%
Information Technology	48%
Electronics/Engineering	43%
Telecommunications	38%
Medical/Health Sciences	28%

CURRENT EXPERIENCE – CALL CENTER

Among the underemployed workers in Flagler County who use call center experience in their current jobs, the figures below show the percentages of those workers who have the specific skills listed. Those skills may or may not be utilized in their current position:

Skills	Percentage of Workers
Office Operations	98%
Information Technology	83%
Telecommunications	83%
Technician/Quality Assurance	83%
Warehouse/Materials Handling	83%
Maintenance/Installation/Repair	83%
Manufacturing/Assembly/Fabrication	67%
Electronics/Engineering	67%
Medical/Health Sciences	50%



CURRENT EXPERIENCE – INFORMATION TECHNOLOGY

Among the underemployed workers in Flagler County who use information technology experience in their current jobs, the figures below show the percentages of those workers who have the specific skills listed. Those skills may or may not be utilized in their current position:

Skills	Percentage of Workers
Office Operations	93%
Information Technology	87%
Technician/Quality Assurance	65%
Telecommunications	61%
Medical/Health Sciences	48%
Warehouse/Materials Handling	42%
Manufacturing/Assembly/Fabrication	39%
Electronics/Engineering	39%
Maintenance/Installation/Repair	23%



CURRENT EXPERIENCE – SALES

Among the underemployed workers in Flagler County who use sales experience in their current jobs, the figures below show the percentages of those workers who have the specific skills listed. Those skills may or may not be utilized in their current position:

Skills	Percentage of Workers
Office Operations	98%
Telecommunications	64%
Information Technology	61%
Warehouse/Materials Handling	52%
Technician/Quality Assurance	52%
Medical/Health Sciences	36%
Manufacturing/Assembly/Fabrication	33%
Maintenance/Installation/Repair	30%
Electronics/Engineering	21%



CURRENT EXPERIENCE – TELECOMMUNICATIONS

Among the underemployed workers in Flagler County who use telecommunications experience in their current jobs, the figures below show the percentages of those workers who have the specific skills listed. Those skills may or may not be utilized in their current position:

Skills	Percentage of Workers
Office Operations	97%
Telecommunications	93%
Information Technology	82%
Technician/Quality Assurance	56%
Electronics/Engineering	41%
Warehouse/Materials Handling	37%
Medical/Health Sciences	37%
Maintenance/Installation/Repair	33%
Manufacturing/Assembly/Fabrication	22%



CURRENT EXPERIENCE – CUSTOMER SERVICE

Among the underemployed workers in Flagler County who use customer service experience in their current jobs, the figures below show the percentages of those workers who have the specific skills listed. Those skills may or may not be utilized in their current position:

Skills	Percentage of Workers
Office Operations	90%
Information Technology	54%
Telecommunications	52%
Technician/Quality Assurance	47%
Medical/Health Sciences	43%
Warehouse/Materials Handling	41%
Manufacturing/Assembly/Fabrication	34%
Maintenance/Installation/Repair	25%
Electronics/Engineering	24%





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