



# Volusia/Flagler County, Florida **Area Workforce Report, 2005**



**THE  
FLAGLER/VOLUSIA COUNTY,  
FLORIDA AREA  
WORKFORCE REPORT**

**October, 2005**

**Compiled and Produced by  
THE PATHFINDERS**



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## EXECUTIVE SUMMARY

The Pathfinders has employed its experience in workforce assessments for corporate site-selection clients and assessments of the civilian workforce in locations where military installations were scheduled for closure to produce this evaluation of the Flagler/Volusia County area workforce. The Pathfinders functions as a site-selection consultant to many of America's largest corporations. Senior human resources executives from among those 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 proved to be accurate.

The information presented in this report has been developed independently of the client, and the client has not influenced the findings. 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 Flagler/Volusia County region.

The findings contained herein include the following observations:

- In addition to the unemployed in the Flagler/Volusia County region, a new employer will be able to attract employees from an additional pool of about 42,300 potentially available workers who have indicated an interest in changing jobs.
- Those workers possess the skills, experience, and education to qualify them for the pay rates at which they would take a new job, and that defines them as “underemployed”. **For the purposes of this report, we use the term “underemployed” to refer to those potentially available workers.**
- The pay rates they specify to take a new job are reasonable when compared to their existing pay rates.



- About 25% of those workers would take a new job for \$11.91 per hour or less. At the upper end, the 25% most qualified and experienced will command more than \$21.07 per hour.
  
- Roughly 8,800 people, neither employed nor seeking work, might re-enter the workforce for the proper job.

To determine the boundaries of the area to be surveyed, The Pathfinders applied the same reasoning that would be used during a site search for a corporate client considering the area as a location to determine the locations from which workers might be drawn to a new employer. The Flagler/Volusia County survey area (Flagler and Volusia Counties in Florida) has an estimated total civilian labor force of approximately 215,700 people. The survey area, referred to in this report as the “labor shed”, contains approximately 11,900 unemployed people who are seeking work.

While the unemployed may be considered a potentially good source of employees, the type of quality employer that the labor shed is attempting to attract typically does not rely on the unemployed to staff a new operation. 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.

Published government statistics report wages and employment for the entire workforce of an area, even though most of this workforce has no interest in changing jobs. The report prepared by The Pathfinders, however, includes data only on those people in the area who might change jobs and who would, therefore, 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.



The results of this assessment determined that in addition to the 11,900 unemployed individuals in the labor shed, approximately 42,300 workers could be defined as underemployed: those individuals who would take a better job if offered by a new or existing employer and who possess the skills, education, and experience to qualify them for a better job. Of these underemployed workers in the labor shed, 8,500 would change jobs for \$10.99 per hour or less, and 50% of them would take a new job for \$15.50 per hour or less.

Additionally, 33% of these underemployed workers have some college experience; 8% have associate degrees; and, another 22% have earned four-year college degrees or higher. 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.

The reader, however, should consider that while the number of underemployed workers identified in the area, as well as their skills, experience, education, and costs, is accurate, all of those individuals would not be acceptable candidates for an employer. Their previous work records, stability, integrity, intelligence, appearance, and other factors could not be considered in the report.

Site searches to identify the optimum location for new facilities have been conducted by The Pathfinders for such clients as AT&T, DuPont, Celanese, 3M Corporation, IMC Global, AIG, Ciba-Geigy, and others of a similar stature. The availability of workers is a critical factor in selecting a location for a new operation, and a workforce analysis has been a key component of the site searches conducted for these corporate clients.

The Pathfinders has applied its site-search experience to this assessment of the workforce in the Flagler/Volusia County region. In instances where similar workforce surveys have been conducted for corporate clients in site-selection projects, the accuracy of the findings has been repeatedly verified as those clients located and began staffing new operations.



## WORKFORCE REPORT

In this workforce assessment, The Pathfinders conducted telephone interviews with individuals throughout the labor shed. Those individuals were stratified across age (19 - 54 years), gender, household income (up to \$100,000), local telephone exchanges, and zip codes. The purpose of these interviews was to ascertain availability for work with a new employer; to determine desired pay rates; and, to collect information on such factors as age, education, commuting patterns, experience, and skills. Sufficient surveys were completed with individuals to produce results for that entire population group which vary by no more than plus or minus 5 percentage points. At that level of variance, the 42,300 people identified as underemployed might actually be as many as 44,415 (plus 5%) or as few as 40,185 (minus 5%). 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 the entire population.

The Pathfinders also applied a proprietary process to the analysis of the data to correct for invalid responses. As an example, those people indicating that they would take a new job but also indicating the desire for increased 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 \$6.50 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.



As a corporate site-selection consultant, The Pathfinders recognizes that the question which most often drives the search for a new business location is whether the candidate location has the workforce needed. In a poll of its corporate clients, The Pathfinders found that those clients' experiences suggest that less than 10% of the new hires for new operations come from the ranks of the unemployed. Instead, these clients staff a new operation principally with underemployed people.

The primary source of good employees for employers moving into an area is the category of the underemployed: those individuals who are now working but desire better jobs and who possess the skills, education, and experience to qualify them for those better jobs. In the Flagler/Volusia County region, approximately 42,300 people can be categorized as underemployed. Reported findings about this group of underemployed workers include:

- About 10% of these individuals would change jobs for under \$9.82 per hour;
- 33⅓% would change jobs for less than \$12.88 per hour; and,
- 50% would change for \$15.50 or less.

Again, 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.



## AVAILABLE WORKERS

### The Flagler/Volusia County Area Labor Shed

Number of underemployed workers	42,300
Number of unemployed persons who are seeking work	11,900
Number of persons who are not working, but are contemplating re-entering the workforce	8,800
<b>Total Number of Workers Available for Employers</b>	<b>63,000</b>

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 \$7.00 to over \$25.00 per hour.

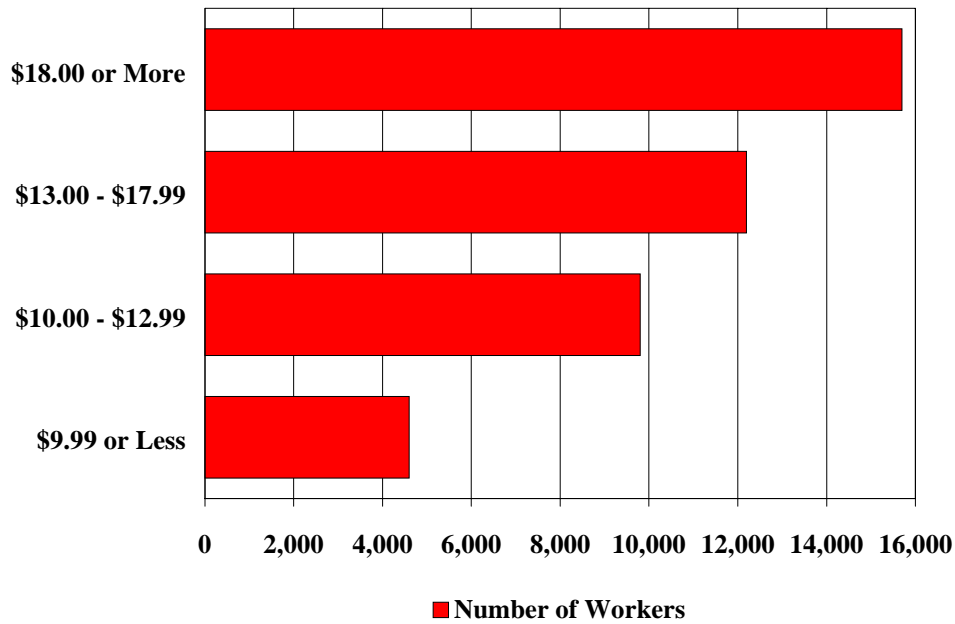
The following data represent the desired pay rates of the underemployed individuals in the labor shed. Many workers expressed their wage requirements in weekly, monthly, or annual terms, but all figures in this report are presented in hourly rates. Selected conversions may add perspective to the hourly rates.

### CONVERSION CHART

Hourly	Weekly	Monthly	Annually
\$ 8.00	\$ 320.00	\$ 1,386.00	\$ 16,640.00
\$ 10.00	\$ 400.00	\$ 1,733.00	\$ 20,800.00
\$ 15.00	\$ 600.00	\$ 2,600.00	\$ 31,200.00
\$ 20.00	\$ 800.00	\$ 3,466.00	\$ 41,600.00
\$ 25.00	\$ 1,000.00	\$ 4,500.00	\$ 52,000.00



**DESIRED WAGE RATES (per hour)**  
**The Flagler/Volusia County Area Labor Shed**  
**42,300 Underemployed Workers**



**NUMBER OF UNDEREMPLOYED WORKERS AVAILABLE (rounded)**  
**AT SPECIFIC HOURLY PAY RATES**  
**The Flagler/Volusia County Area Labor Shed**  
**42,300 Underemployed Workers**

<u>\$ 6.99 or Less</u>	<u>\$ 7.00 - \$ 7.99</u>	<u>\$ 8.00 - \$ 8.99</u>	<u>\$ 9.00 - \$ 9.99</u>
<b>700</b>	<b>400</b>	<b>1,500</b>	<b>2,000</b>
<u>\$ 10.00 - \$ 10.99</u>	<u>\$ 11.00 - \$ 11.99</u>	<u>\$ 12.00 - \$ 12.99</u>	<u>\$ 13.00 - \$ 13.99</u>
<b>3,900</b>	<b>2,300</b>	<b>3,600</b>	<b>2,300</b>
<u>\$ 14.00 - \$ 14.99</u>	<u>\$ 15.00 - \$ 15.99</u>	<u>\$ 16.00 - \$ 16.99</u>	<u>\$ 17.00 - \$ 17.99</u>
<b>2,500</b>	<b>3,900</b>	<b>2,000</b>	<b>1,500</b>
<u>\$ 18.00 - \$ 18.99</u>	<u>\$ 19.00 - \$ 19.99</u>	<u>\$ 20.00 - \$ 24.99</u>	<u>\$ 25.00 or More</u>
<b>1,800</b>	<b>2,000</b>	<b>6,300</b>	<b>5,600</b>

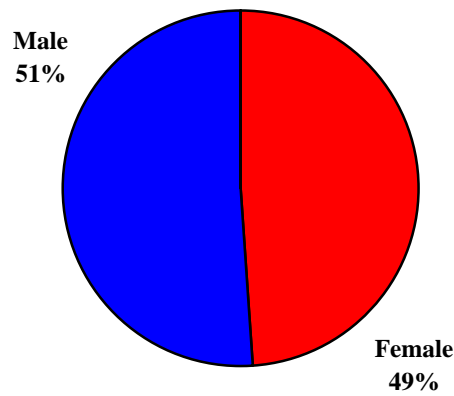


## CHARACTERISTICS OF UNDEREMPLOYED WORKERS

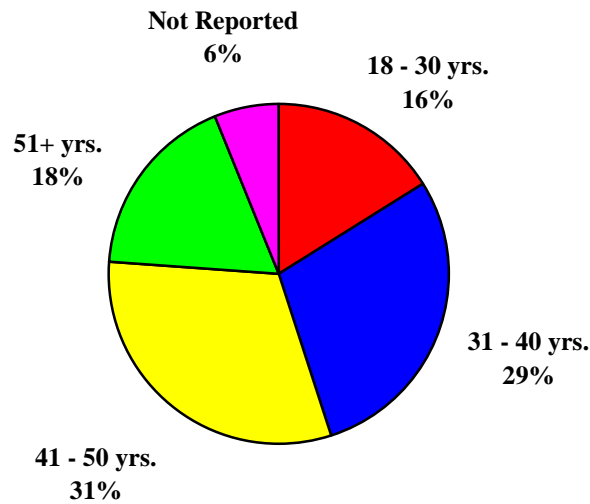
### The Flagler/Volusia County Area Labor Shed

The following charts provide information on various characteristics of the underemployed workers in the labor shed.

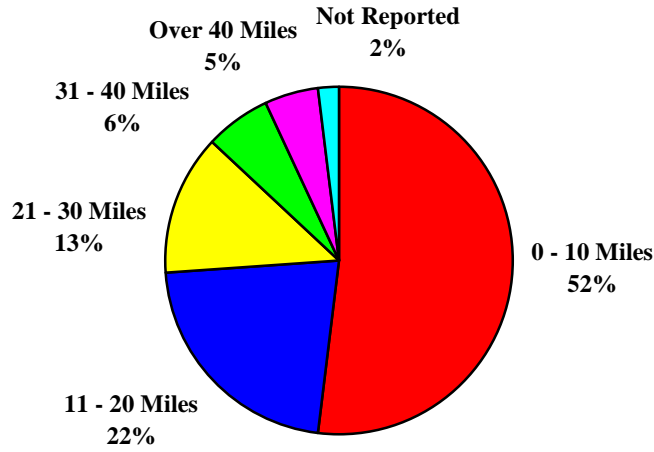
#### GENDER



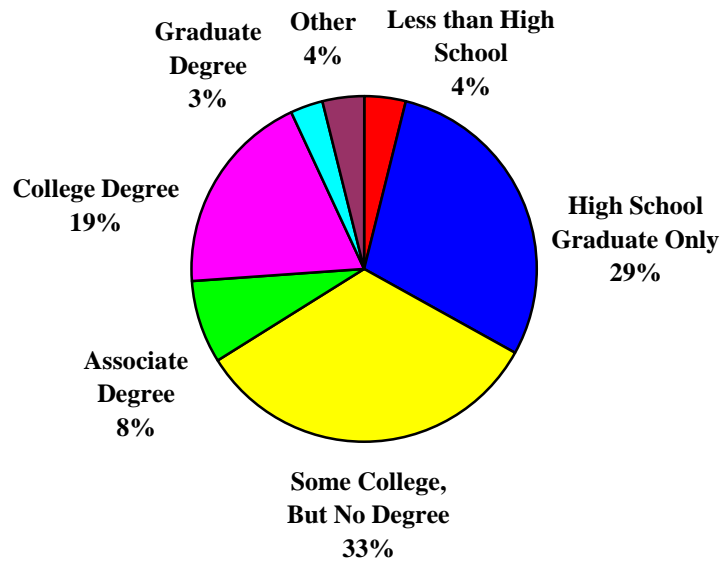
#### AGE



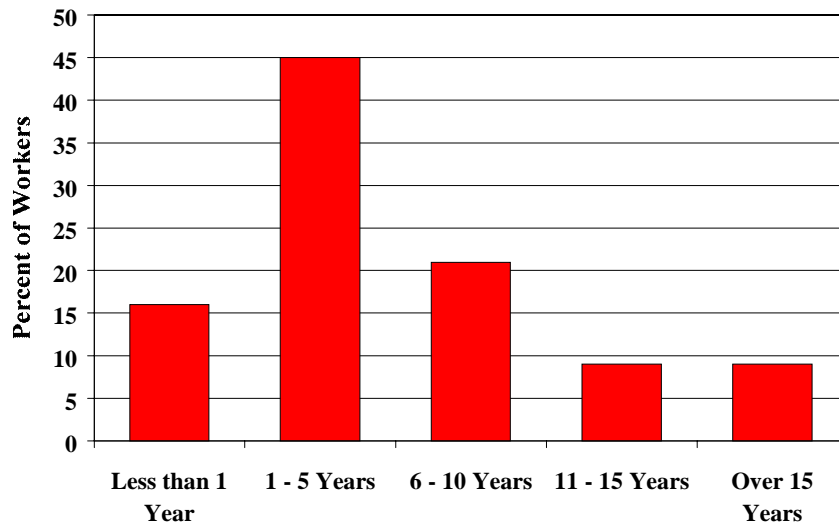
### COMMUTING DISTANCES



### EDUCATION



### LENGTH OF TIME IN CURRENT JOB



### CURRENT PAY RATES PER HOUR BY %

<u>\$ 6.99 or Less</u>	<u>\$ 7.00 - \$ 7.99</u>	<u>\$ 8.00 - \$ 8.99</u>	<u>\$ 9.00 - \$ 9.99</u>
<b>6%</b>	<b>5%</b>	<b>5%</b>	<b>7%</b>
<u>\$ 10.00 - \$ 10.99</u>	<u>\$ 11.00 - \$ 11.99</u>	<u>\$ 12.00 - \$ 12.99</u>	<u>\$ 13.00 - \$ 13.99</u>
<b>9%</b>	<b>4%</b>	<b>7%</b>	<b>7%</b>
<u>\$ 14.00 - \$ 14.99</u>	<u>\$ 15.00 - \$ 15.99</u>	<u>\$ 16.00 - \$ 16.99</u>	<u>\$ 17.00 - \$ 17.99</u>
<b>6%</b>	<b>8%</b>	<b>3%</b>	<b>3%</b>
<u>\$ 18.00 - \$ 18.99</u>	<u>\$ 19.00 - \$ 19.99</u>	<u>\$ 20.00 - \$ 24.99</u>	<u>\$ 25.00 or More</u>
<b>3%</b>	<b>3%</b>	<b>10%</b>	<b>12%</b>



## EXPERIENCE AND SKILLS

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;
- office, data processing, call centers, or other operations which might be “white collar” in nature;
- distribution or transportation operations; and,
- operations related to sales or customer service and other public interface.

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 “industrial experience” may not have “industrial machines” skills, but could have “materials handling” skills if they work in shipping or receiving. “Sales” and “customer service” experience cross 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/Volusia County Area Labor Shed (rounded)**

<b>Experience*</b>	<b>Number of Persons</b>	<b>Percentage</b>
Office/Data/Word Processing	24,100	57%
Warehouse/Distribution/Transportation	23,300	55%
Manufacturing/Assembly	20,300	48%
Industrial Operations	14,000	33%
Call Center	8,900	21%
Government/Education	14,000	33%
Sales	24,100	57%
Customer Service	29,200	69%

**EMPLOYMENT SKILLS OF UNDEREMPLOYED WORKERS****The Flagler/Volusia County Area Labor Shed (rounded)**

<b>Skills*</b>	<b>Number of Persons</b>	<b>Percentage</b>
Office/Data/Word Processing	26,600	63%
Warehouse/Materials Handling	22,000	52%
Manufacturing/Assembly/Fabrication	18,600	44%
Machining/Welding/Other Industrial Machines	11,800	28%
Telecommunications	14,000	33%
Technician/Quality Assurance	19,000	45%
Maintenance	17,300	41%
Electronics/Engineering	10,600	25%

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



While unemployment rates indicate the presence of approximately 11,900 unemployed persons in the labor shed, the results of this workforce assessment suggest that an additional 8,800 people, who are not currently employed or actively seeking work, would re-enter the workforce and take a good job if offered. Approximately 81% of these additional individuals are female, and the group is one and a half year younger on average than the underemployed.

The education of this additional group roughly mirrors that of the underemployed members of the workforce, albeit with a somewhat higher concentration of “Associate Degree”. This group exhibits competitive measures of experience and skills in the following areas:

- sales
- customer service
- telecommunications

The pay rates required by this group to re-enter the workforce appear to be in a range between \$7.00 and \$25.00 per hour. The lower quartile would take \$8.99 or less, and the upper quartile desires \$17.43 per hour or more.

The determinations for this segment of the workforce have a larger statistical variance than that for the underemployed.



## **EMPLOYERS' VIEWS OF 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. Employers interviewed were asked to provide subjective views of their workers, in addition to objective and quantitative measurements of labor productivity, availability, attitudes, and costs. 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 Flagler/Volusia County region.

The Flagler/Volusia County area workforce received high marks for productivity. Many of the companies interviewed stated that their local operations compared very favorably with operations in other locations in terms of profitability and production, 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, absentee rates, tardiness rates, and turnover 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 companies interviewed in the Flagler/Volusia County region judged absenteeism to be low to moderate. Most of the companies reported turnover to be low to moderate. Most stated that substance abuse incidence is very low.

The educational competencies of employees is another factor used to evaluate an area's labor force. In general, the Flagler/Volusia County area employers rated the local educational providers as "good" and gave the following ratings to their employees relative to competency in reading, writing, and calculations.



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

Category	Excellent	Good	Fair	Poor
Reading/Writing Competency	13%	87%	0%	0%
Calculations Competency	14%	80%	6%	0%

A common employer complaint relates to the shortage of skilled and technical workers. The availability of these workers in the Flagler/Volusia County 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, 74% considered skilled worker availability to be “Excellent” or “Good”, while 13% considered it to be “Fair”. The availability of technical workers in the labor shed was rated “Excellent” or “Good” by 74% of the interviewed companies and “Fair” by 13%.

The following table provides a composite portrait of employers’ experiences with and opinions of workers in the Flagler/Volusia County 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.

Category	Excellent	Good	Fair	Poor
Availability of Skilled Workers	27%	47%	13%	13%
Availability of Unskilled Workers	27%	60%	13%	0%
Availability of Professional Workers	20%	47%	27%	6%
Availability of Technical Workers	14%	60%	13%	13%
Worker Productivity	27%	67%	6%	0%
Worker Reliability and Attitudes	20%	67%	13%	0%



**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 competency; calculations competency; 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, 27% 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 19%, and the “Highest” rating recorded in the “Excellent” category is 57%. The same comparison applies for each of the other factors.

In these charts, the Flagler/Volusia County area is shown as “Labor Shed”.



### WORKER PRODUCTIVITY

Excellent		Good		Fair		Poor	
Highest	57%	Highest	86%	Highest	46%	Highest	13%
<b>Labor Shed</b>	<b>27%</b>	<b>Labor Shed</b>	<b>67%</b>	<b>Labor Shed</b>	<b>6%</b>	<b>Labor Shed</b>	<b>0%</b>
Median	19%	Median	59%	Median	19%	Median	5%

### WORKER RELIABILITY AND ATTITUDES

Excellent		Good		Fair		Poor	
Highest	54%	Highest	83%	Highest	43%	Highest	17%
<b>Labor Shed</b>	<b>20%</b>	<b>Labor Shed</b>	<b>67%</b>	<b>Labor Shed</b>	<b>13%</b>	<b>Labor Shed</b>	<b>0%</b>
Median	18%	Median	55%	Median	23%	Median	6%

### READING/WRITING COMPETENCY

Excellent		Good		Fair		Poor	
Highest	40%	Highest	81%	Highest	70%	Highest	31%
<b>Labor Shed</b>	<b>13%</b>	<b>Labor Shed</b>	<b>87%</b>	<b>Labor Shed</b>	<b>0%</b>	<b>Labor Shed</b>	<b>0%</b>
Median	9%	Median	54%	Median	32%	Median	8%

### CALCULATIONS COMPETENCY

Excellent		Good		Fair		Poor	
Highest	50%	Highest	75%	Highest	68%	Highest	30%
<b>Labor Shed</b>	<b>14%</b>	<b>Labor Shed</b>	<b>80%</b>	<b>Labor Shed</b>	<b>6%</b>	<b>Labor Shed</b>	<b>0%</b>
Median	8%	Median	45%	Median	40%	Median	13%



**AVAILABILITY OF SKILLED WORKERS**

Excellent		Good		Fair		Poor	
Highest	50%	Highest	70%	Highest	63%	Highest	37%
<b>Labor Shed</b>	<b>27%</b>	<b>Labor Shed</b>	<b>47%</b>	<b>Labor Shed</b>	<b>13%</b>	<b>Labor Shed</b>	<b>13%</b>
Median	7%	Median	42%	Median	36%	Median	21%

**AVAILABILITY OF UNSKILLED WORKERS**

Excellent		Good		Fair		Poor	
Highest	58%	Highest	85%	Highest	55%	Highest	21%
<b>Labor Shed</b>	<b>27%</b>	<b>Labor Shed</b>	<b>60%</b>	<b>Labor Shed</b>	<b>13%</b>	<b>Labor Shed</b>	<b>0%</b>
Median	22%	Median	50%	Median	21%	Median	8%

**AVAILABILITY OF PROFESSIONAL WORKERS**

Excellent		Good		Fair		Poor	
Highest	33%	Highest	75%	Highest	69%	Highest	46%
<b>Labor Shed</b>	<b>20%</b>	<b>Labor Shed</b>	<b>47%</b>	<b>Labor Shed</b>	<b>27%</b>	<b>Labor Shed</b>	<b>6%</b>
Median	7%	Median	37%	Median	36%	Median	23%

**AVAILABILITY OF TECHNICAL WORKERS**

Excellent		Good		Fair		Poor	
Highest	36%	Highest	79%	Highest	78%	Highest	58%
<b>Labor Shed</b>	<b>14%</b>	<b>Labor Shed</b>	<b>60%</b>	<b>Labor Shed</b>	<b>13%</b>	<b>Labor Shed</b>	<b>13%</b>
Median	7%	Median	28%	Median	48%	Median	22%



## 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 Flagler/Volusia County 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 Flagler/Volusia County 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 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 Flagler/Volusia County 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 Flagler/Volusia County 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

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	Culpeper Co., VA	Lee’s Summit, MO	Richmond, KY
Amarillo, TX	Dallas, TX	Lexington, KY	Rutherford Co., TN
Anderson, IN	Danville, IL	Long Island, NY	Salisbury, MD
Ardmore, OK	Daytona Beach, FL	Louisville, KY	San Angelo, TX
Atascadero, CA	Decatur, AL	Kokomo, IN	San Marcos, TX
Atlanta, GA	Evansville, IN	Eastern Shore, MD	Scranton, PA
Auburn, AL	Fauquier Co., VA	Marion County, KY	Seguin, TX
Baldwin Co., AL	Frankfort, KY	Moberly, MO	Seneca Co., NY
Bay Co., FL	Gillette, WY	Mobile, AL	Shasta Co., CA
Bedford, TX	Grays Harbor, WA	Mohawk Valley, NY	Shelby Co., AL
Bentonville, AR	Greene Co., NY	Montgomery, AL	Shoals, AL
Binghamton, NY	Haskell, TX	Monroe, LA	Shreveport, LA
Birmingham, AL	Hazleton, PA	Morehouse Parish, LA	Sikeston, MO
Bowie, TX	Henderson, KY	Muncie, IN	Spokane, WA
Bryan, TX	Hendricks, IN	New Braunfels, TX	Springfield, IL
Buffalo, NY	Hernando Co., FL	New York City, NY	Syracuse, NY
Bullitt Co., KY	Hudson Valley, NY	Nicholasville, KY	Tallahassee, FL
Cambridge, MD	Huntsville, AL	Ontario Co., NY	Talledega, AL
Campbellsville, KY	Hurst, TX	Paducah, KY	Terre Haute, IN
Cape Girardeau, MO	Indianapolis, IN	Pampa, TX	Tioga Co., NY
Chattanooga, TN	Independence, MO	Panama City, FL	Tipton Co., IN
Cheyenne, WY	Jackson Co., MO	Pensacola, FL	Tuscaloosa, AL
College Station, TX	Lake Havasu, AZ	Prescott Valley, AZ	Tucson, AZ
Conroe, TX	LaSalle, IL	Reno, NV	Vermillion Co., IN
Corpus Christi, TX	Lea Co., NM	Richland Parish, LA	Warren Co., NY



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 \$7.00 per hour or below to \$25.00 per hour or above and who 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 merit and would take a new job for \$11.91 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 \$8.30 per hour or less, the median \$10.18 or less, and the highest desired pay rate was \$14.75 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
\$11.91 or Less	\$8.30 or Less	\$10.18 or Less	\$14.75 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% can command \$21.07 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 \$15.06 or more, the median \$18.72 or more, and the highest was \$25.07 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
\$21.07 or More	\$15.06 or More	\$18.72 or More	\$25.07 or More



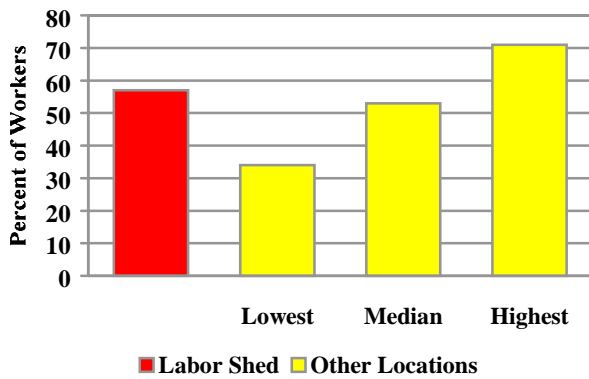
The following charts compare the percentages of underemployed workers in the Flagler/Volusia County region who have experience in various fields of employment with the percentages of underemployed workers in locations surveyed over the past eighteen months who have the same type of experience. In the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

The experience charts are followed by skills charts, which compare the percentages of underemployed workers in the Flagler/Volusia County 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 Flagler/Volusia County region is referred to as “labor shed”.

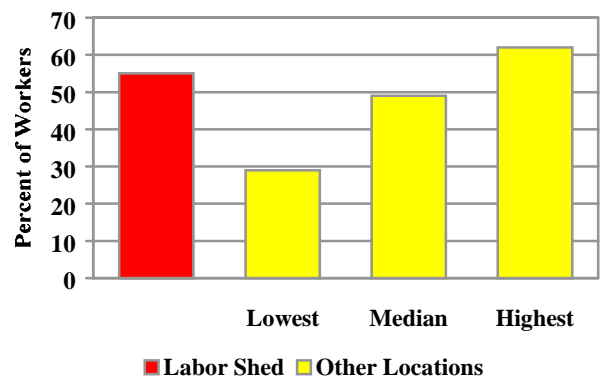


**COMPARISON OF EXPERIENCE  
UNDEREMPLOYED WORKERS  
The Flagler/Volusia County Area /  
Locations Surveyed Over the Past 18 Months**

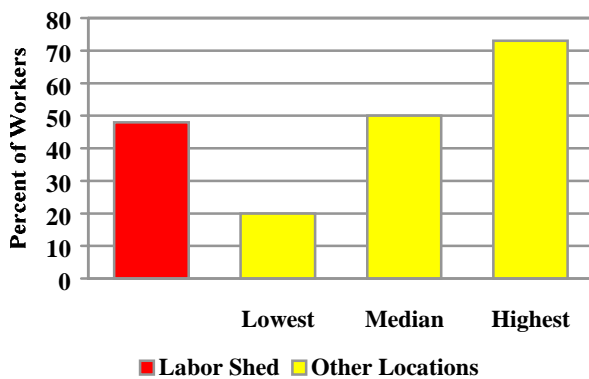
**OFFICE / DATA / WORD PROCESSING**



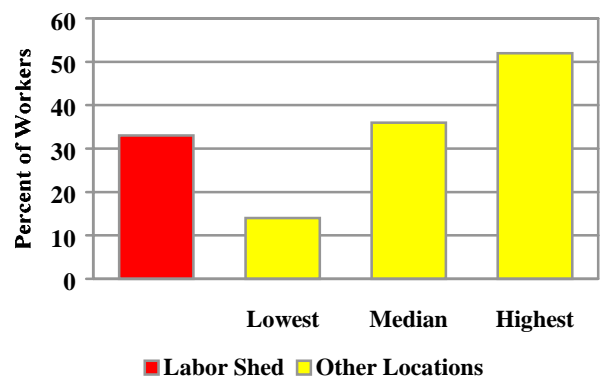
**WAREHOUSE / DISTRIBUTION /  
TRANSPORTATION**



**MANUFACTURING / ASSEMBLY**

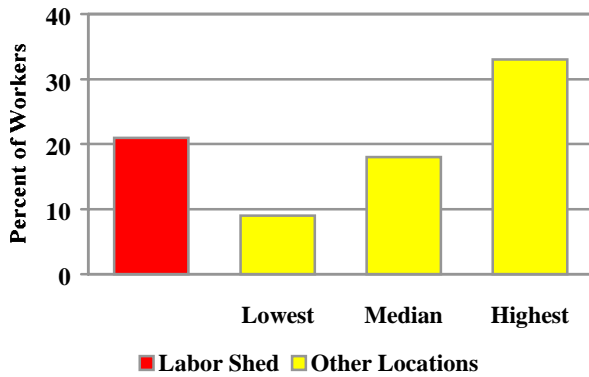


**INDUSTRIAL OPERATIONS**

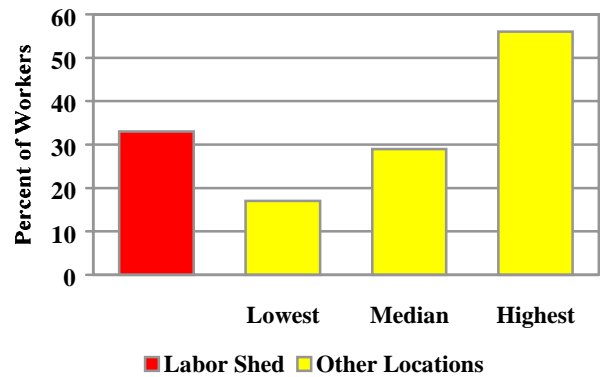


**COMPARISON OF EXPERIENCE  
UNDEREMPLOYED WORKERS  
The Flagler/Volusia County Area /  
Locations Surveyed Over the Past 18 Months**

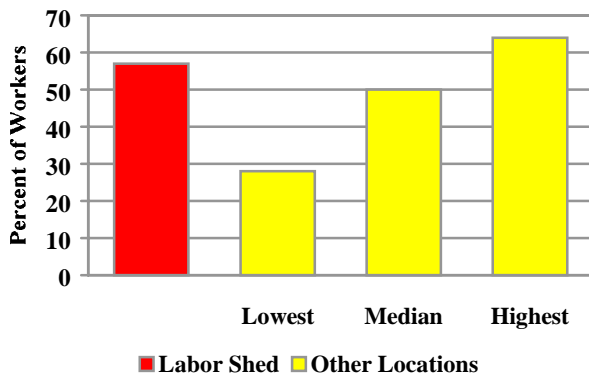
**CALL CENTER**



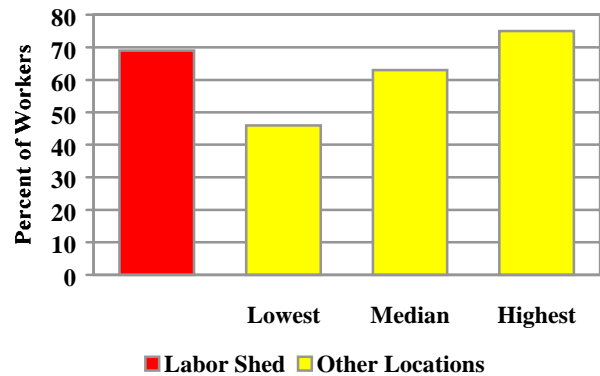
**GOVERNMENT / EDUCATION**



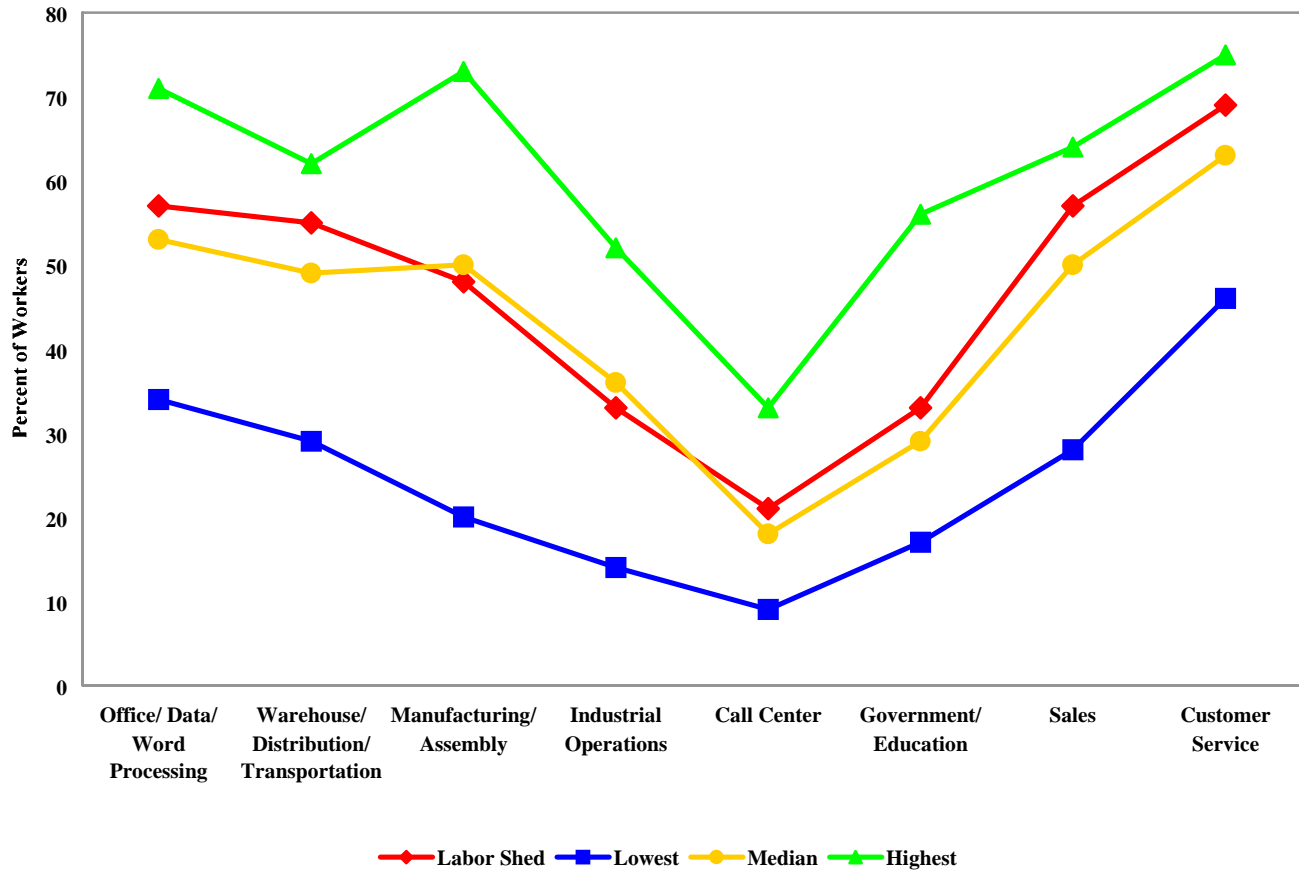
**SALES**



**CUSTOMER SERVICE**

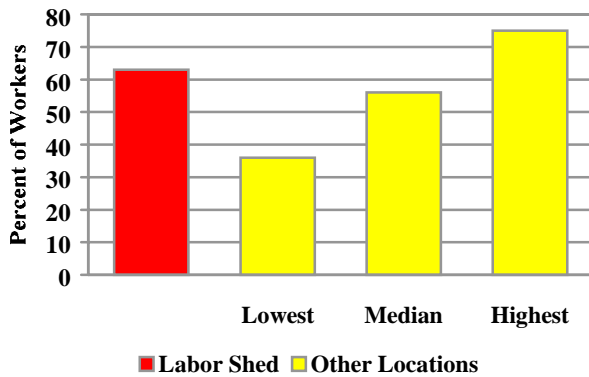


**SUMMARY COMPARISON OF EXPERIENCE  
UNDEREMPLOYED WORKERS  
The Flagler/Volusia County Area /  
Locations Surveyed Over the Past 18 Months**

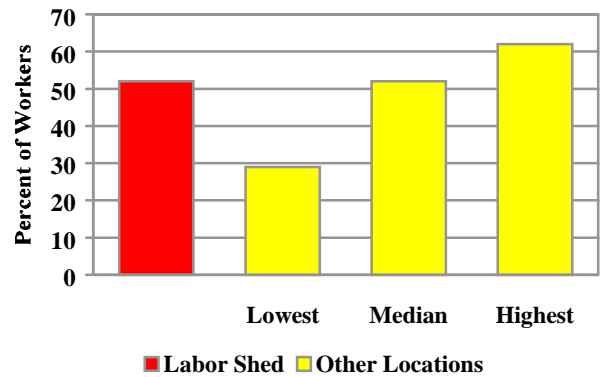


**COMPARISON OF SKILLS**  
**UNDEREMPLOYED WORKERS**  
**The Flagler/Volusia County Area /**  
**Locations Surveyed Over the Past 18 Months**

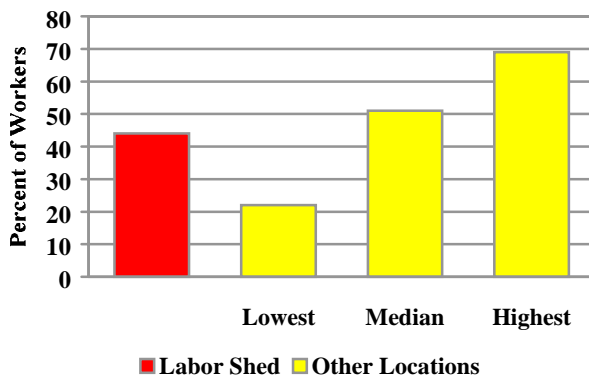
**OFFICE / DATA / WORD PROCESSING**



**WAREHOUSE / MATERIALS HANDLING**



**MANUFACTURING / ASSEMBLY / FABRICATION**

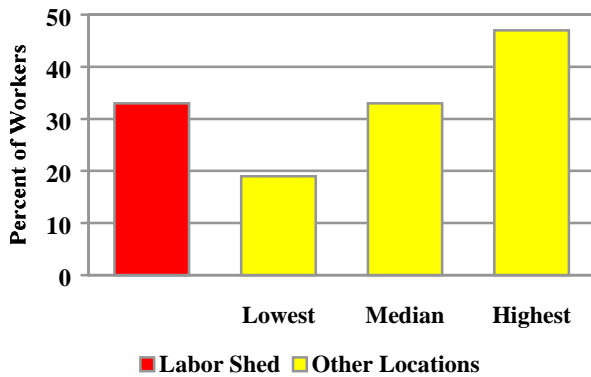


**MACHINING / WELDING / OTHER INDUSTRIAL MACHINES**

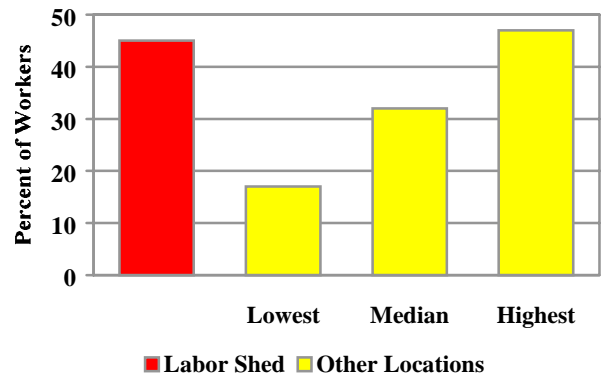


**COMPARISON OF SKILLS  
UNDEREMPLOYED WORKERS  
The Flagler/Volusia County Area /  
Locations Surveyed Over the Past 18 Months**

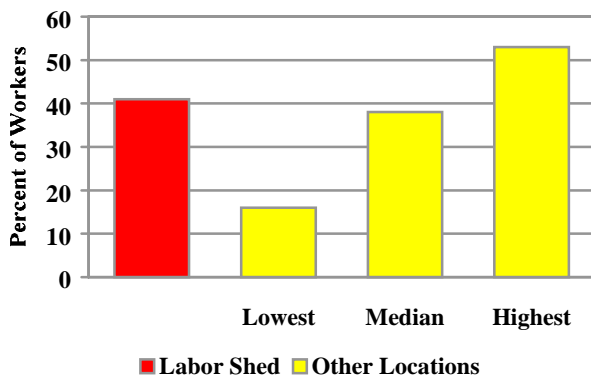
**TELECOMMUNICATIONS**



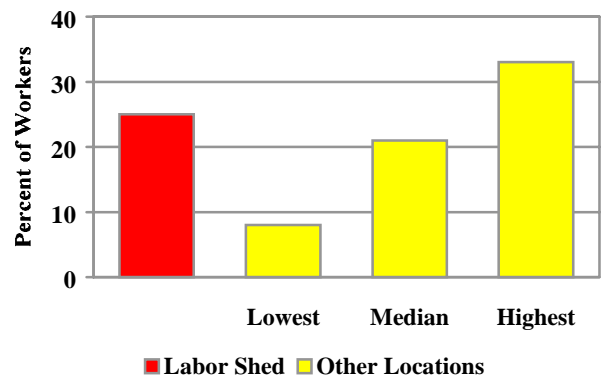
**TECHNICIAN / QUALITY ASSURANCE**



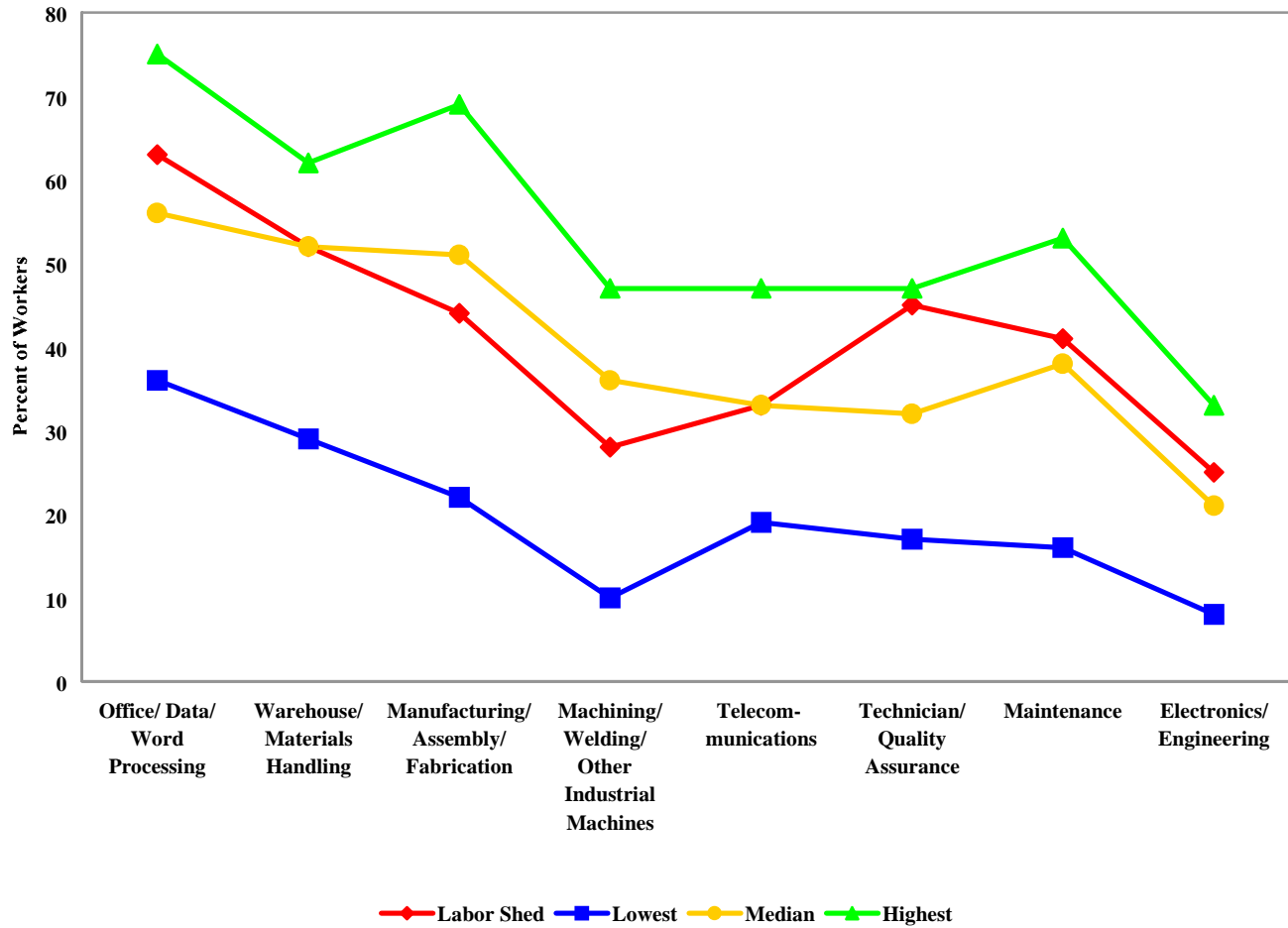
**MAINTENANCE**



**ELECTRONICS / ENGINEERING**



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



## CLOSING REMARKS

The foregoing report represents an assessment of the underemployment that exists in the Flagler/Volusia County 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 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 the Flagler/Volusia County 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:**

<b>The Flagler/Volusia County Area Civilian Workforce .....</b>	<b>215,700</b>
<b>Largest Workforce Surveyed by The Pathfinders .....</b>	<b>3,452,000</b>
<b>Median Workforce Surveyed by The Pathfinders .....</b>	<b>138,800</b>
<b>Smallest Workforce Surveyed by The Pathfinders.....</b>	<b>3,350</b>
<b>Number of Locations Surveyed by The Pathfinders.....</b>	<b>304</b>



## SUPPLEMENTAL SECTION

This supplemental section of the report shows the skills and desired pay of the underemployed workers in the Flagler/Volusia County area 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 inclusivity 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 RATE OF UNDEREMPLOYED  
IN THE FLAGLER/VOLUSIA COUNTY AREA  
WHOSE CURRENT EXPERIENCE IS IN:**

<b>OFFICE/DATA/WORD PROCESSING EXPERIENCE</b>						
<b>Desired Pay Per Hour</b>	<b>Up to \$10.99</b>	<b>\$11.00- \$13.99</b>	<b>\$14.00- \$16.99</b>	<b>\$17.00- \$19.99</b>	<b>\$20.00- \$24.99</b>	<b>Over \$25.00</b>
<b>Percentage of Workers</b>	11%	12%	19%	14%	17%	17%

<b>WAREHOUSE/DISTRIBUTION/TRANSPORTATION EXPERIENCE</b>						
<b>Desired Pay Per Hour</b>	<b>Up to \$10.99</b>	<b>\$11.00- \$13.99</b>	<b>\$14.00- \$16.99</b>	<b>\$17.00- \$19.99</b>	<b>\$20.00- \$24.99</b>	<b>Over \$25.00</b>
<b>Percentage of Workers</b>	7%	26%	21%	18%	15%	7%

<b>MANUFACTURING/ASSEMBLY EXPERIENCE</b>						
<b>Desired Pay Per Hour</b>	<b>Up to \$10.99</b>	<b>\$11.00- \$13.99</b>	<b>\$14.00- \$16.99</b>	<b>\$17.00- \$19.99</b>	<b>\$20.00- \$24.99</b>	<b>Over \$25.00</b>
<b>Percentage of Workers</b>	26%	15%	26%	12%	18%	3%

<b>INDUSTRIAL OPERATIONS EXPERIENCE</b>						
<b>Desired Pay Per Hour</b>	<b>Up to \$10.99</b>	<b>\$11.00- \$13.99</b>	<b>\$14.00- \$16.99</b>	<b>\$17.00- \$19.99</b>	<b>\$20.00- \$24.99</b>	<b>Over \$25.00</b>
<b>Percentage of Workers</b>	12%	7%	15%	19%	27%	12%



**DESIRED PAY RATE OF UNDEREMPLOYED  
IN THE FLAGLER/VOLUSIA COUNTY AREA  
WHOSE CURRENT EXPERIENCE IS IN:**

<b>CALL CENTER EXPERIENCE</b>						
<b>Desired Pay Per Hour</b>	<b>Up to \$10.99</b>	<b>\$11.00- \$13.99</b>	<b>\$14.00- \$16.99</b>	<b>\$17.00- \$19.99</b>	<b>\$20.00- \$24.99</b>	<b>Over \$25.00</b>
<b>Percentage of Workers</b>	5%	16%	16%	16%	16%	21%

<b>GOVERNMENT/EDUCATION EXPERIENCE</b>						
<b>Desired Pay Per Hour</b>	<b>Up to \$10.99</b>	<b>\$11.00- \$13.99</b>	<b>\$14.00- \$16.99</b>	<b>\$17.00- \$19.99</b>	<b>\$20.00- \$24.99</b>	<b>Over \$25.00</b>
<b>Percentage of Workers</b>	8%	12%	16%	8%	40%	16%

<b>SALES EXPERIENCE</b>						
<b>Desired Pay Per Hour</b>	<b>Up to \$10.99</b>	<b>\$11.00- \$13.99</b>	<b>\$14.00- \$16.99</b>	<b>\$17.00- \$19.99</b>	<b>\$20.00- \$24.99</b>	<b>Over \$25.00</b>
<b>Percentage of Workers</b>	14%	18%	14%	11%	23%	14%

<b>CUSTOMER SERVICE EXPERIENCE</b>						
<b>Desired Pay Per Hour</b>	<b>Up to \$10.99</b>	<b>\$11.00- \$13.99</b>	<b>\$14.00- \$16.99</b>	<b>\$17.00- \$19.99</b>	<b>\$20.00- \$24.99</b>	<b>Over \$25.00</b>
<b>Percentage of Workers</b>	13%	17%	20%	10%	19%	14%



**CURRENT EXPERIENCE – OFFICE/DATA/WORD PROCESSING**

Among the workers in the Flagler/Volusia County area whose current experience is in office/data/word processing, the figures below show the percentages of those workers who have the specific skills listed. Those skills may or may not be utilized in the current position:

<b>Skill</b>	<b>% of Workers</b>
Office/Data/Word Processing	94%
Warehouse/Materials Handling	38%
Manufacturing/Assembly	25%
Industrial Machines	9%
Telecommunications	48%
Technician/Quality Assurance	42%
Maintenance	27%
Electronics/Engineering	18%

**CURRENT EXPERIENCE – WAREHOUSE/DISTRIBUTION/TRANSPORTATION**

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

<b>Skill</b>	<b>% of Workers</b>
Office/Data/Word Processing	67%
Warehouse/Materials Handling	82%
Manufacturing/Assembly	64%
Industrial Machines	36%
Telecommunications	36%
Technician/Quality Assurance	69%
Maintenance	59%
Electronics/Engineering	31%



**CURRENT EXPERIENCE – MANUFACTURING/ASSEMBLY**

Among the workers in the Flagler/Volusia County area whose current experience is in manufacturing/assembly, the figures below show the percentages of those workers who have the specific skills listed. Those skills may or may not be utilized in the current position:

<b>Skill</b>	<b>% of Workers</b>
Office/Data/Word Processing	38%
Warehouse/Materials Handling	85%
Manufacturing/Assembly	94%
Industrial Machines	74%
Telecommunications	24%
Technician/Quality Assurance	65%
Maintenance	65%
Electronics/Engineering	41%

**CURRENT EXPERIENCE – INDUSTRIAL OPERATIONS**

Among the workers in the Flagler/Volusia County area whose current experience is in industrial operations, the figures below show the percentages of those workers who have the specific skills listed. Those skills may or may not be utilized in the current position:

<b>Skill</b>	<b>% of Workers</b>
Office/Data/Word Processing	58%
Warehouse/Materials Handling	92%
Manufacturing/Assembly	85%
Industrial Machines	65%
Telecommunications	39%
Technician/Quality Assurance	69%
Maintenance	69%
Electronics/Engineering	46%



**CURRENT EXPERIENCE – CALL CENTER**

Among the workers in the Flagler/Volusia County area whose current experience is in call center, the figures below show the percentages of those workers who have the specific skills listed. Those skills may or may not be utilized in the current position:

<b>Skill</b>	<b>% of Workers</b>
Office/Data/Word Processing	90%
Warehouse/Materials Handling	37%
Manufacturing/Assembly	11%
Industrial Machines	11%
Telecommunications	74%
Technician/Quality Assurance	69%
Maintenance	42%
Electronics/Engineering	21%

**CURRENT EXPERIENCE – GOVERNMENT/EDUCATION**

Among the workers in the Flagler/Volusia County area whose current experience is in government/education, the figures below show the percentages of those workers who have the specific skills listed. Those skills may or may not be utilized in the current position:

<b>Skill</b>	<b>% of Workers</b>
Office/Data/Word Processing	76%
Warehouse/Materials Handling	44%
Manufacturing/Assembly	24%
Industrial Machines	32%
Telecommunications	44%
Technician/Quality Assurance	48%
Maintenance	36%
Electronics/Engineering	36%



**CURRENT EXPERIENCE – SALES**

Among the workers in the Flagler/Volusia County area whose current experience is in sales, the figures below show the percentages of those workers who have the specific skills listed. Those skills may or may not be utilized in the current position:

<b>Skill</b>	<b>% of Workers</b>
Office/Data/Word Processing	70%
Warehouse/Materials Handling	60%
Manufacturing/Assembly	44%
Industrial Machines	28%
Telecommunications	44%
Technician/Quality Assurance	54%
Maintenance	46%
Electronics/Engineering	26%

**CURRENT EXPERIENCE – CUSTOMER SERVICE**

Among the workers in the Flagler/Volusia County area whose current experience is in customer service, the figures below show the percentages of those workers who have the specific skills listed. Those skills may or may not be utilized in the current position:

<b>Skill</b>	<b>% of Workers</b>
Office/Data/Word Processing	75%
Warehouse/Materials Handling	51%
Manufacturing/Assembly	35%
Industrial Machines	21%
Telecommunications	42%
Technician/Quality Assurance	47%
Maintenance	38%
Electronics/Engineering	24%

