

**THE
TAYLOR / HUTTO, TEXAS
AREA
LABOR AVAILABILITY REPORT**

November, 2004

**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 Taylor / Hutto area workforce. The information presented in this report has been developed independently of the client, and the client has not influenced the findings.

The Pathfinders functions as a site-selection consultant to many of America's largest corporations, including companies such as AT&T, DuPont, Celanese, 3M Corporation, IMC Global, Singapore Aerospace, AIG, and Ciba-Geigy. The question which 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 less than 10% of the new hires for new operations 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 possess the skills, education, and experience to qualify them for those better jobs. By that definition, those individuals can be considered "underemployed" and are identified as such in this report. The type of quality employer that the Taylor / Hutto region is attempting to attract will typically hire people who come from this group. As a consequence, The Pathfinders was retained to quantify the extent to which underemployment exists in the area, as well as to document the cost, skills, experience, and education of that hidden workforce. This report represents the objective and professional view of The Pathfinders with regard to workforce availability, cost, skills, and quality that a new employer can expect in the Taylor / Hutto region.



SUMMARY OF FINDINGS

- The Taylor / Hutto area, referred to in this report as the “labor shed”, has a population of approximately 135,500.
- The labor shed has a civilian labor force of approximately 80,200.
- The labor shed has a pool of approximately 2,900 unemployed persons who are actively seeking work.
- A new employer will be able to attract employees from an additional pool of about 14,500 potentially available workers, referred to in this report as the “underemployed”, who have indicated an interest in changing jobs.
- These workers 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.
- About 25% of the underemployed workers would take a new job for \$12.39 per hour or less. At the upper end, the 25% most qualified and experienced will command \$25.54 per hour or more.
- The median desired pay rate of the underemployed workers is \$16.70 per hour.
- Roughly 600 people, neither employed nor seeking work, might re-enter the workforce for the proper job.



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 only on those people in the area who might 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.

The first step in assessing the workforce of the Taylor / Hutto area was to determine the boundaries of the area to be assessed. To accomplish this task, The Pathfinders applied the same reasoning that would be used during a site search for a corporate client considering the area as a potential location. The Taylor / Hutto survey area includes those locations from which workers might be drawn to a new employer and is referred to in this report as the “labor shed”. This labor shed consists of portions of Bastrop, Lee and Milam Counties and portions of Bell, Travis and Williamson Counties east of I-35.

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

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



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

This process considers that to be counted as underemployed, an individual must be currently employed and willing to take another job at a pay rate commensurate with personal skills, education, and experience.

Current pay alone is not the qualifying factor for underemployment status in this study. Individuals, for example, making \$8.50 per hour, possessing no high school degree or skills, and being in the workforce for less than one year may consider themselves to be underemployed but are not considered to be so in this report. On the other hand, education, skills, and experience may qualify the person making \$22.00 per hour as truly underemployed.

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

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



ASSESSMENT OF THE WORKFORCE

The Taylor / Hutto area labor shed has a population of approximately 135,500. The civilian labor force numbers approximately 80,200, and the labor shed contains approximately 2,900 unemployed people who are seeking work.

The results of this assessment determined that approximately 14,500 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 possess the skills, education, and experience to qualify them to do so. Further, the results suggest that an additional 600 people who are not currently employed or actively seeking work would re-enter the workforce and take a good job if offered. In total, the Taylor / Hutto area has approximately 18,000 available workers for new or existing employers.

AVAILABLE WORKERS

Number of underemployed workers	14,500
Number of unemployed persons who are actively seeking work	2,900
Number of persons who are not working, but are contemplating re-entering the workforce	600
Total Number of Workers Available for Employers	18,000

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.

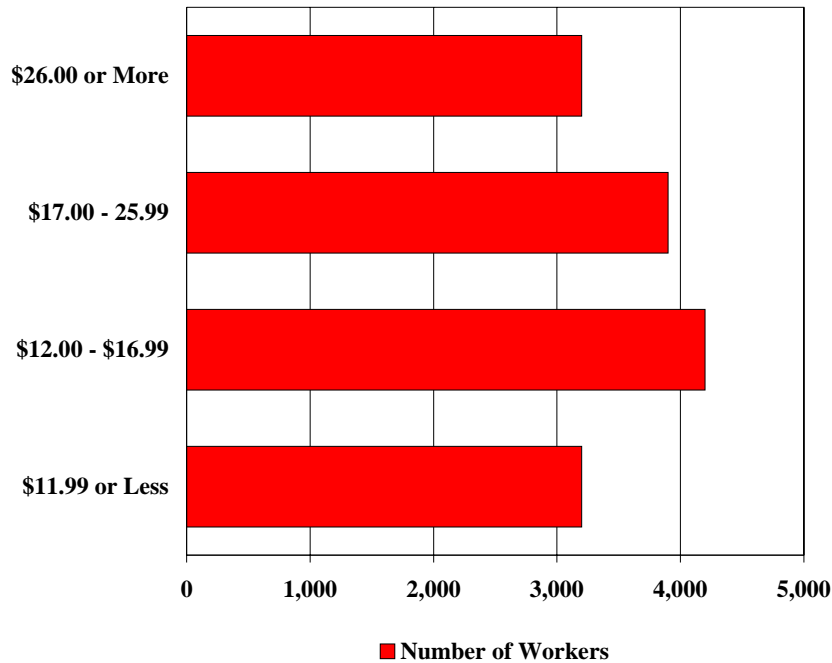
The following data represent the desired pay rates of the underemployed individuals in the labor shed. Many workers expressed their wage requirements in weekly, monthly, or annual terms, but all wage figures in this report are presented in hourly rates. Selected conversions may add perspective to the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

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
\$ 12.00	\$ 480.00	\$ 2,078.00	\$ 24,960.00
\$ 14.00	\$ 560.00	\$ 2,425.00	\$ 29,120.00
\$ 16.00	\$ 640.00	\$ 2,771.00	\$ 33,280.00
\$ 18.00	\$ 720.00	\$ 3,118.00	\$ 37,440.00
\$ 20.00	\$ 800.00	\$ 3,464.00	\$ 41,600.00
\$ 22.00	\$ 880.00	\$ 3,810.00	\$ 45,760.00
\$ 24.00	\$ 960.00	\$ 4,157.00	\$ 49,920.00
\$ 26.00	\$ 1,040.00	\$ 4,503.00	\$ 54,080.00
\$ 28.00	\$ 1,120.00	\$ 4,850.00	\$ 58,240.00
\$ 30.00	\$ 1,200.00	\$ 5,196.00	\$ 62,400.00



DESIRED WAGE RATES PER HOUR BY RANGE
14,500 Underemployed Workers



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

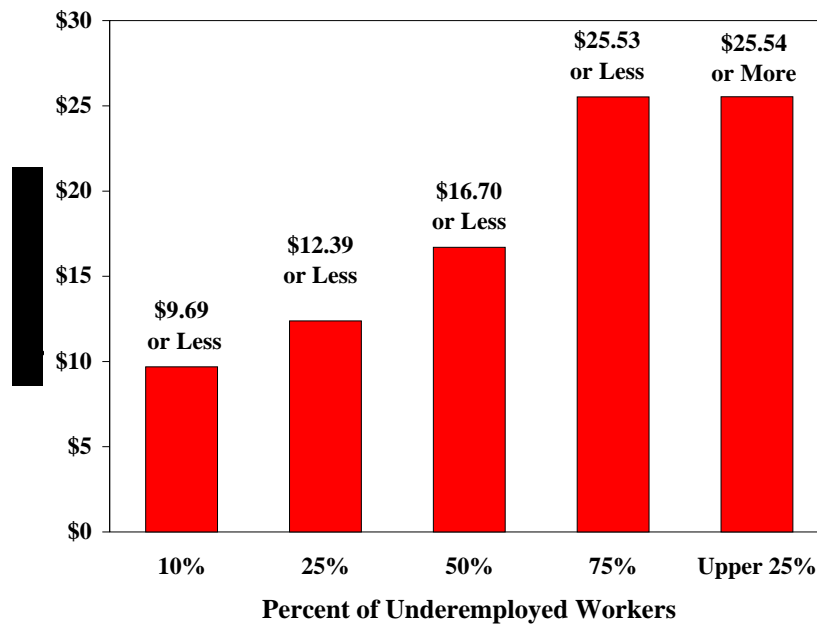
<u>\$7.99 or Less</u> 400	<u>\$8.00 - \$8.99</u> 500	<u>\$9.00 - \$9.99</u> 800	<u>\$10.00 - \$10.99</u> 900	<u>\$11.00 - \$11.99</u> 600
<u>\$12.00 - \$12.99</u> 1,100	<u>\$13.00 - \$13.99</u> 700	<u>\$14.00 - \$14.99</u> 700	<u>\$15.00 - \$15.99</u> 1,200	<u>\$16.00 - \$16.99</u> 500
<u>\$17.00 - \$17.99</u> 900	<u>\$18.00 - \$18.99</u> 300	<u>\$19.00 - \$19.99</u> 700	<u>\$20.00 - \$20.99</u> 300	<u>\$21.00 - \$21.99</u> 100
<u>\$22.00 - \$22.99</u> 200	<u>\$23.00 - \$23.99</u> 100	<u>\$24.00 - \$24.99</u> 400	<u>\$25.00 - \$25.99</u> 900	<u>\$26.00 - \$26.99</u> 300
<u>\$27.00 - \$27.99</u> 100	<u>\$28.00 - \$28.99</u> 200	<u>\$29.00 - \$29.99</u> 500	<u>\$30.00 - \$ 30.99</u> 500	<u>\$31.00 or More</u> 1,600



Utilizing the desired wage information as illustrated in the preceding charts, the following conclusions can be drawn concerning the underemployed workers in the Taylor / Hutto area:

- 10% of the underemployed workers will require \$9.69 per hour or less to change jobs.
- 25% of the underemployed workers will require \$12.39 per hour or less to change jobs.
- 50% of the underemployed workers will require \$16.70 per hour or less to change jobs.
- 75% of the underemployed workers will require \$25.53 per hour or less to change jobs.
- The upper 25% of the underemployed workers will require wages beginning at \$25.54 per hour and extending upward to over \$30.00 per hour. These are the most qualified and experienced workers.

DESIRED WAGE RATES BY PERCENT

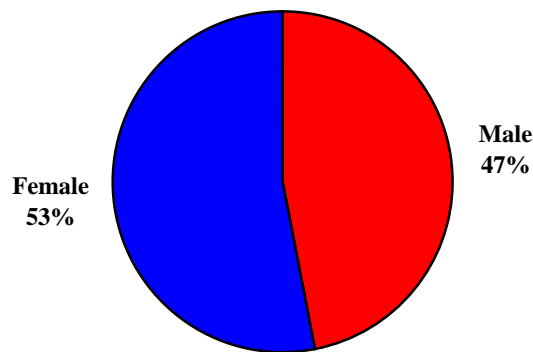


CHARACTERISTICS OF UNDEREMPLOYED WORKERS

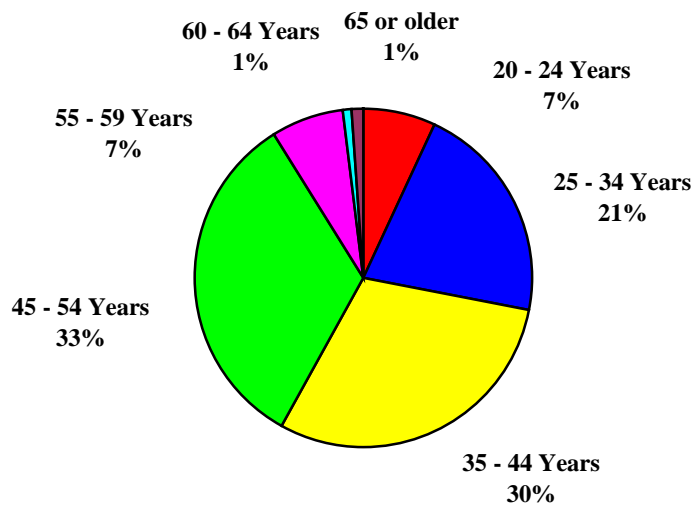
The Taylor / Hutto Area Labor Shed

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

GENDER

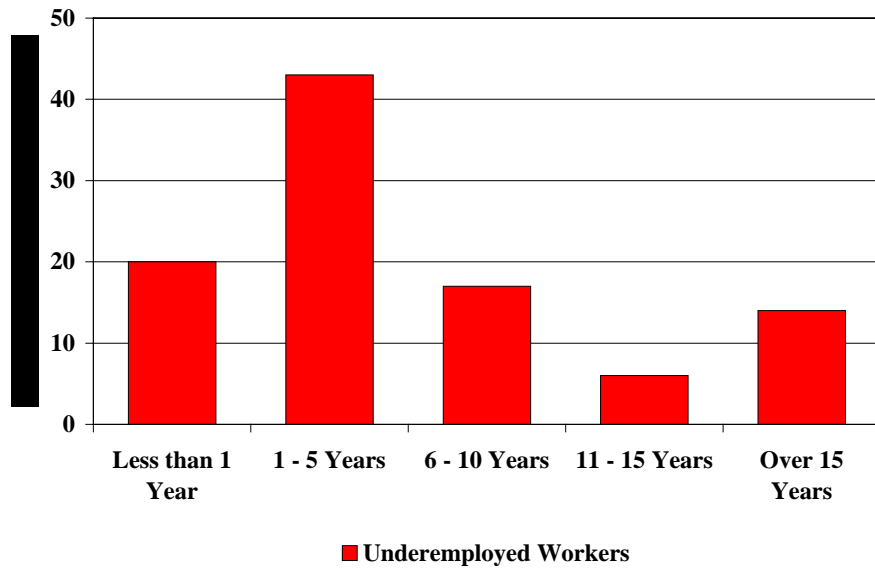


AGE

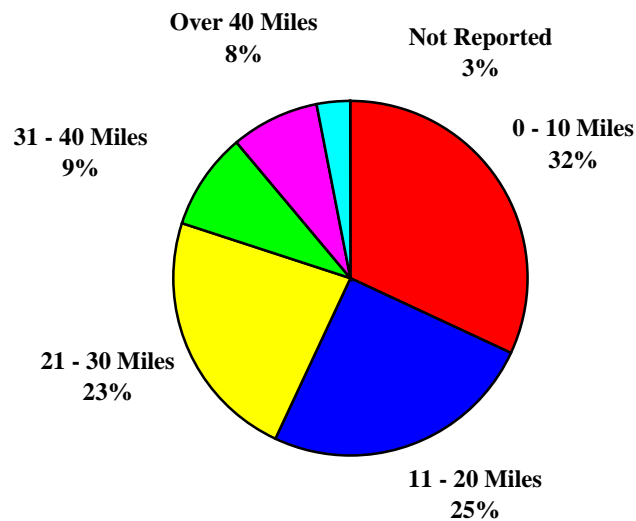


CHARACTERISTICS OF UNDEREMPLOYED WORKERS

LENGTH OF TIME IN CURRENT JOB

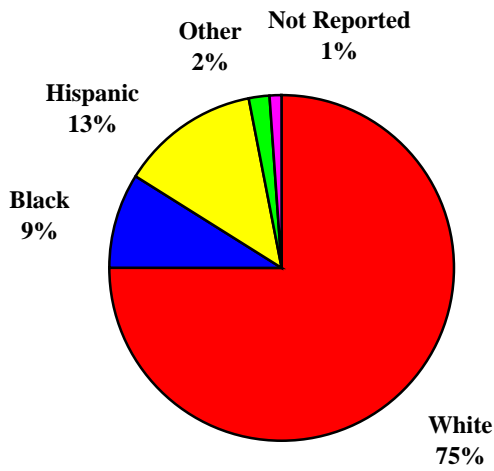


COMMUTING DISTANCES

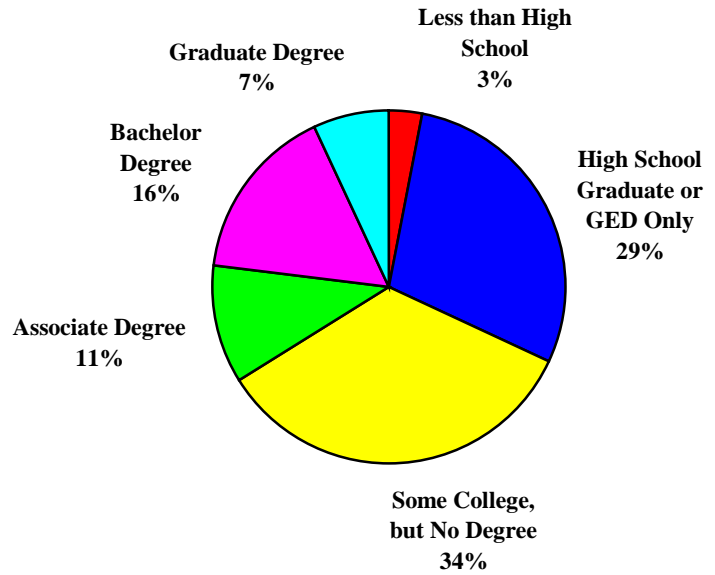


CHARACTERISTICS OF UNDEREMPLOYED WORKERS

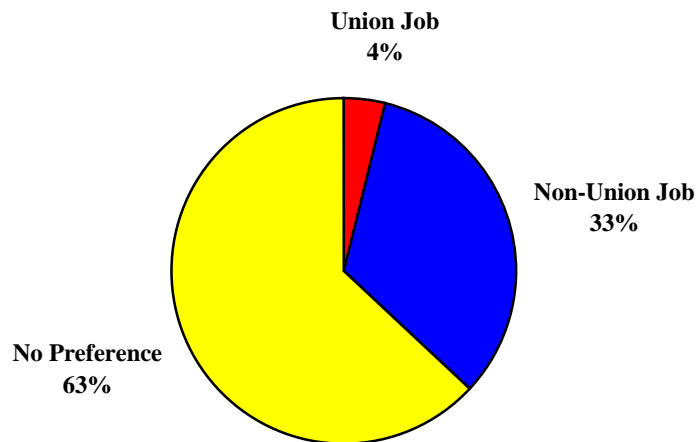
RACE



EDUCATION



UNION PREFERENCE



UNDEREMPLOYED WORKERS - AREA OF EMPLOYMENT

Current Area of Employment	Number of Persons*	Percentage*
Government/Civil Service	1,600	11%
Education	1,500	10%
Medical/Health Care	1,200	8%
Food Service/Production	1,000	7%
Construction	900	6%
Manufacturing/Assembly	900	6%
Sales/Customer Service	900	6%
Trades	700	5%
Professional and Business Services	600	4%
Retail	600	4%
Architecture/Electronics/Engineering	400	3%
Arts, Entertainment, Recreation, Sports	400	3%
Banking/Finance	400	3%
Information Technology	400	3%
Insurance	400	3%
Personal Services	400	3%
Shipping/Transportation/Warehousing	400	3%
Other	400	3%
Computer Programming/Software Development	300	2%
Maintenance/Installation/Repair	300	2%
Office	300	2%
Agriculture	100	1%
Forestry	100	1%
Hospitality	100	1%
Real Estate	100	1%
Telecommunications	100	1%

* rounded



EXPERIENCE AND SKILLS – UNDEREMPLOYED WORKERS

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

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

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

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

Experience*	Number of Persons	Percentage
Office/Data/Word Processing	8,700	60%
Warehouse/Distribution/Transportation	6,400	44%
Manufacturing/Assembly/Fabrication	5,800	40%
Biotechnology/Health Sciences	3,300	23%
Maintenance/Installation/Repair	4,400	30%
Call Center	4,100	28%
Information Technology/ Telecommunications/Computer	5,400	37%
Sales/Customer Service	9,300	64%

EMPLOYMENT SKILLS OF UNDEREMPLOYED WORKERS

Skills*	Number of Persons	Percentage
Office/Data/Word Processing	9,400	65%
Warehouse/Materials Handling	7,000	48%
Manufacturing/Assembly/Fabrication	5,900	41%
Biotechnology/Health Sciences	3,200	22%
Maintenance/Installation/Repair	4,900	34%
Technician/Quality Assurance	5,100	35%
Information Technology/ Telecommunications/Computer	5,500	38%
Electronics/Engineering	2,300	16%

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



**MEDIAN PAY RATE AT WHICH UNDEREMPLOYED WORKERS
WITH VARIOUS SKILLS WILL CHANGE JOBS**

Skills*	Desired Pay
Office/Data/Word Processing	\$17.33
Warehouse/Materials Handling	\$16.80
Manufacturing/Assembly/Fabrication	\$16.50
Biotechnology/Health Sciences	\$17.00
Maintenance/Installation/Repair	\$19.50
Technician/Quality Assurance	\$19.00
Information Technology/ Telecommunications/Computer	\$17.42
Electronics/Engineering	\$24.00

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



UNEMPLOYED WORKERS

The results of this survey indicate that 43% of the unemployed workers in the Taylor / Hutto area who are actively seeking work were laid off from their jobs. Further, 18% are unemployed because their job was eliminated, the company at which they were employed closed, or the company relocated to another city, county or country. Survey findings also indicate that 34% of the unemployed individuals who are actively seeking work are unemployed due to personal choice, for example, they are retired or stay-at-home individuals. Published statistics document 2,900 unemployed workers in the labor shed, however, this figure could possibly be higher since some of these potential workers may not be counted on the rolls of the state unemployment agencies.

This survey also indicates that 60% of the unemployed, actively seeking work, individuals are female and over 50% of them are between the ages of 20 and 34. The median desired pay rate for this group of available workers is \$9.44 per hour, and they possess a wide range of experience and skills in multiple categories.

Furthermore, the survey results suggest that an additional 600 people, who are not currently employed or actively seeking work, would re-enter the workforce and take a good job if offered. About 76% of these additional individuals are female, and the group is almost four and one-half years older 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 "Less than High School". This group exhibits competitive measures of experience and skills in the areas of manufacturing/assembly/fabrication and government/education. The wages required by this group to re-enter the workforce fall across a broad spectrum of pay rates, with \$12.99 per hour as the median. The lower quartile would take \$9.43 or less, and the upper quartile desires \$22.00 per hour or more.

The determinations for these segments of the workforce have a larger statistical variance than that for the underemployed.



In the course of workforce and wage and fringe benefits surveys, local employers are asked to rate their workforce 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”. Also included in these ratings is the opinion of the participating employers of the local educational providers in terms of delivering the skills that are needed or required for workers.

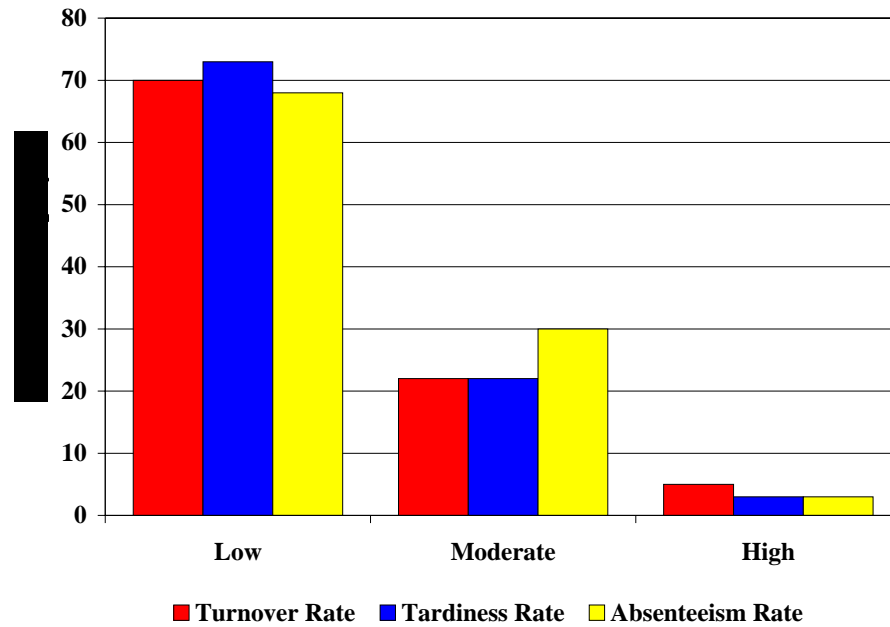
Based upon the experience of The Pathfinders in evaluating labor forces in numerous locations, a definite correlation between productivity, absenteeism, tardiness, and turnover appears to exist. That correlation goes beyond the fact that an absent worker is obviously unproductive. Rather, those factors are indicative of an employee’s attitude toward the job. Employers in the Taylor / Hutto area were asked to rate turnover, tardiness, and absenteeism for both skilled and unskilled workers as “Low”, “Moderate”, or “High”. Collectively, these rates were reported to be higher among unskilled workers than skilled workers.

Also included in this correlation is the degree of substance abuse found among workers. Employers in the Taylor / Hutto area were surveyed as to their substance abuse testing policies and were asked to rate the level of substance abuse.

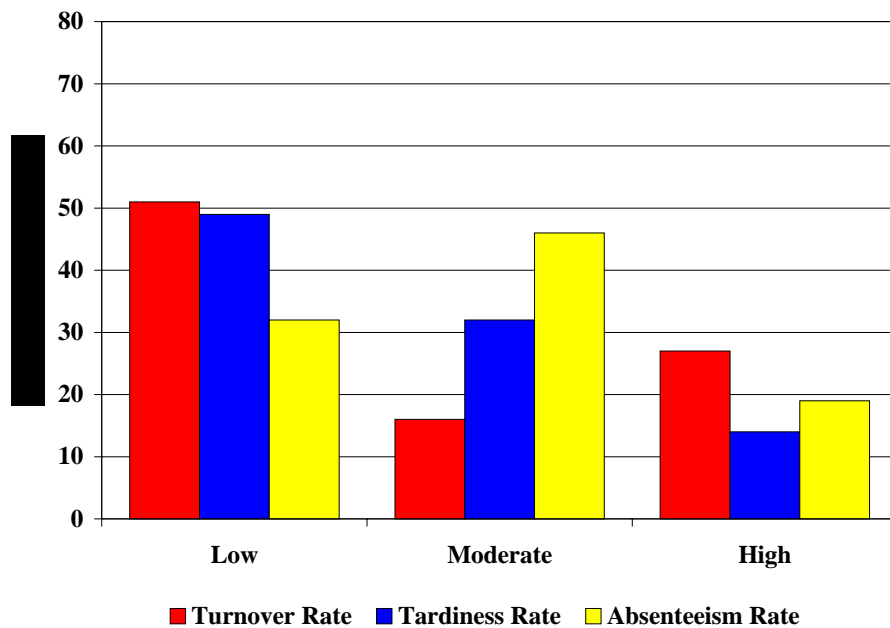
The employer ratings of the workforce for all the categories mentioned above are presented in the charts and graphs on the following pages.



**PERCENT OF EMPLOYERS RATING
SKILLED WORKERS – TURNOVER, TARDINESS, ABSENTEEISM**



**PERCENT OF EMPLOYERS RATING
UNSKILLED WORKERS – TURNOVER, TARDINESS, ABSENTEEISM**

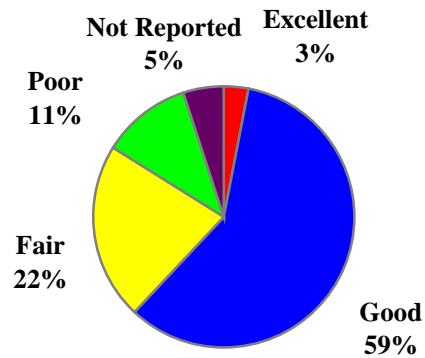


In consideration of all factors, 70% of the employers in the Taylor / Hutto area rated the productivity of the workforce as “Good” to “Excellent”. Worker reliability and attitudes received high marks as well from 62% of the employers.

Productivity

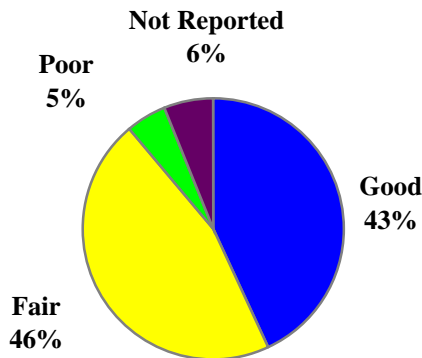


Reliability & Attitudes

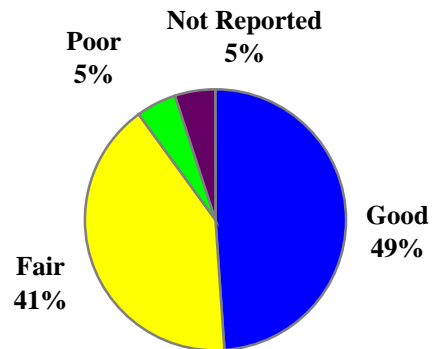


The Taylor / Hutto area employers gave the following ratings to their employees relative to competency in reading, writing, and calculations.

Reading/Writing

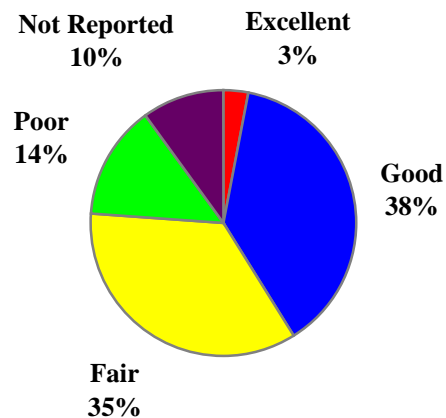


Arithmetic



Local educational providers, including public schools, technical training facilities, etc., were rated as follows by the participating employers:

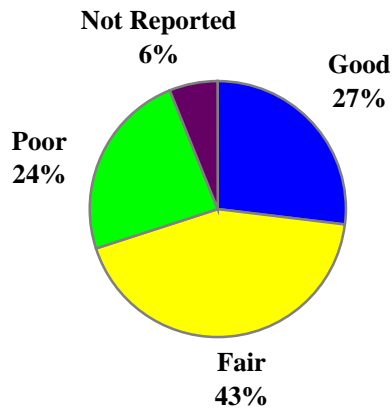
Educational Providers



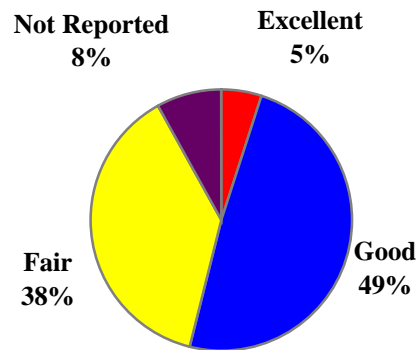
A common employer complaint relates to the shortage of skilled and technical workers. The availability of these workers in the Taylor / Hutto region must be viewed from the perspective of comparative availability when other areas of the state and nation are considered. Skilled and technical workers are in great demand and difficult to find in the vast majority of locations. Of the companies surveyed, 27% considered skilled worker availability to be "Excellent" or "Good", while 43% considered it to be "Fair". The availability of technical workers in the Taylor / Hutto area was rated "Excellent" or "Good" by 27% of the participating companies and "Fair" by 49%. Each availability category with ratings follows.

EMPLOYER RATINGS OF WORKFORCE AVAILABILITY (percentages of employers surveyed)

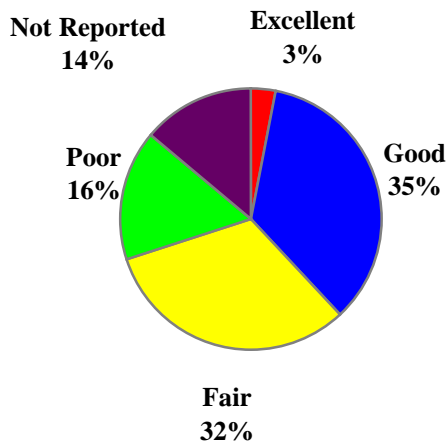
Skilled Availability



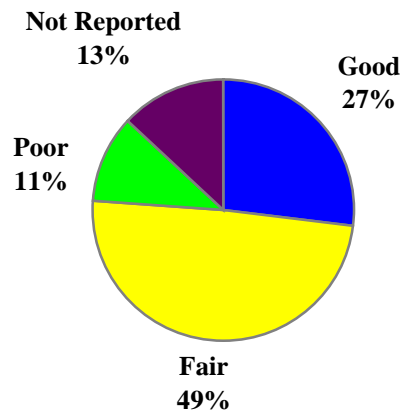
Unskilled Availability



Professional Availability



Technical Availability



COMPARISONS OF EMPLOYERS RATINGS

The Taylor / Hutto Area Labor Shed /

Locations Previously Surveyed

As described in the preceding pages, local employers were asked to rate their workforce on a number of factors. The purpose of these 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 to twenty-four months. Such a comparison provides an assessment of area 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 Taylor / Hutto 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 to twenty-four 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, 11% of the Taylor / Hutto area employers rated "Worker Productivity" as "Excellent". Of all the locations surveyed during the last eighteen to twenty-four months, the "Median" for that rating is 27%, and the "Highest" rating recorded in the "Excellent" category is 67%. The same comparison applies for each of the other factors.

The comparison tables are followed by a "Quick Look" Comparison Chart.

In the tables, the Taylor / Hutto area is referred to as the "Labor Shed".



WORKER PRODUCTIVITY

Excellent		Good		Fair		Poor	
Highest	67%	Highest	83%	Highest	37%	Highest	10%
Labor Shed	11%	Labor Shed	59%	Labor Shed	22%	Labor Shed	3%
Median	27%	Median	58%	Median	12%	Median	5%

WORKER RELIABILITY AND ATTITUDES

Excellent		Good		Fair		Poor	
Highest	57%	Highest	83%	Highest	43%	Highest	15%
Labor Shed	3%	Labor Shed	59%	Labor Shed	22%	Labor Shed	11%
Median	21%	Median	56%	Median	19%	Median	6%

READING/WRITING COMPETENCY

Excellent		Good		Fair		Poor	
Highest	44%	Highest	87%	Highest	57%	Highest	21%
Labor Shed	0%	Labor Shed	43%	Labor Shed	46%	Labor Shed	5%
Median	13%	Median	53%	Median	28%	Median	8%

CALCULATIONS COMPETENCY

Excellent		Good		Fair		Poor	
Highest	38%	Highest	80%	Highest	64%	Highest	30%
Labor Shed	0%	Labor Shed	49%	Labor Shed	41%	Labor Shed	5%
Median	11%	Median	50%	Median	33%	Median	11%



AVAILABILITY OF SKILLED WORKERS

Excellent		Good		Fair		Poor	
Highest	50%	Highest	79%	Highest	53%	Highest	53%
Labor Shed	0%	Labor Shed	27%	Labor Shed	43%	Labor Shed	24%
Median	6%	Median	43%	Median	36%	Median	18%

AVAILABILITY OF UNSKILLED WORKERS

Excellent		Good		Fair		Poor	
Highest	66%	Highest	80%	Highest	50%	Highest	14%
Labor Shed	5%	Labor Shed	49%	Labor Shed	38%	Labor Shed	0%
Median	25%	Median	52%	Median	20%	Median	7%

AVAILABILITY OF PROFESSIONAL WORKERS

Excellent		Good		Fair		Poor	
Highest	33%	Highest	78%	Highest	61%	Highest	46%
Labor Shed	3%	Labor Shed	35%	Labor Shed	32%	Labor Shed	16%
Median	6%	Median	38%	Median	38%	Median	14%

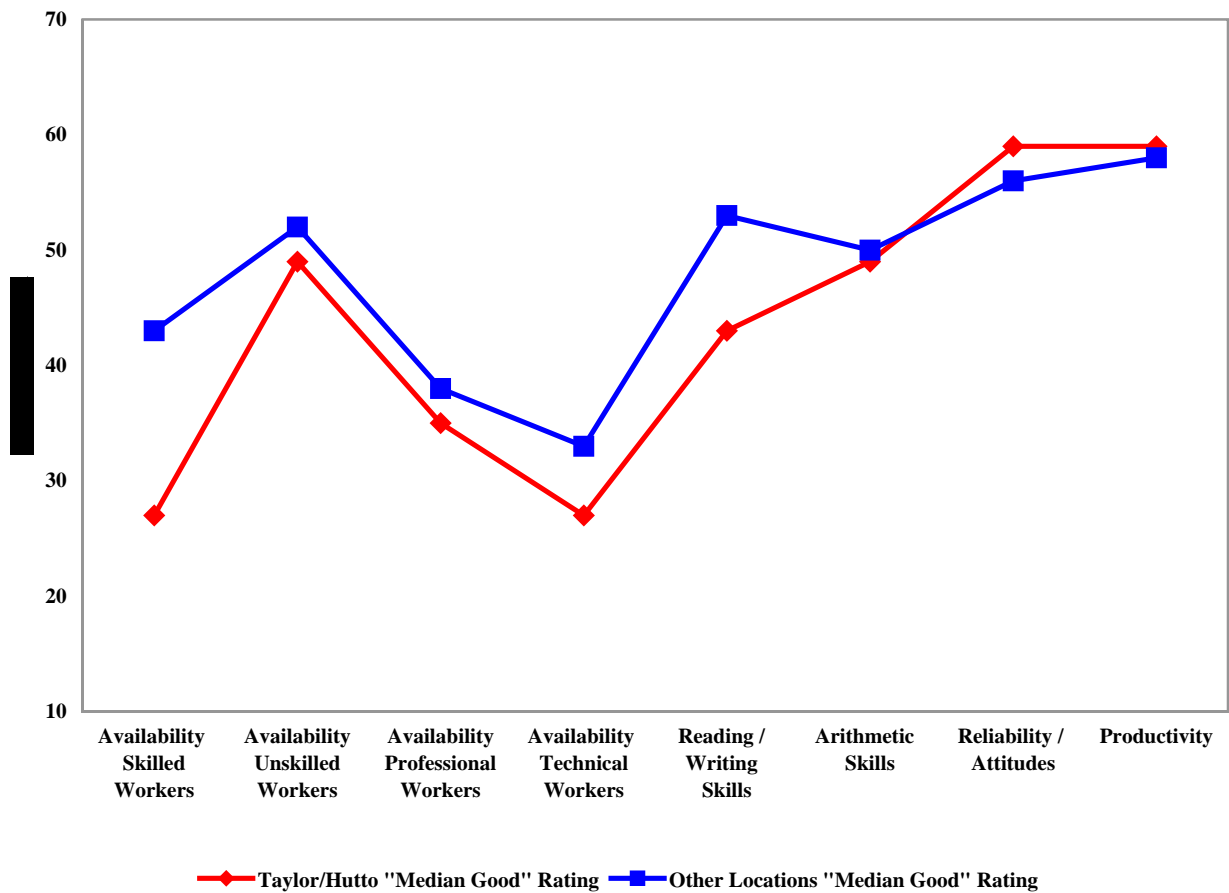
AVAILABILITY OF TECHNICAL WORKERS

Excellent		Good		Fair		Poor	
Highest	33%	Highest	79%	Highest	62%	Highest	57%
Labor Shed	0%	Labor Shed	27%	Labor Shed	49%	Labor Shed	11%
Median	6%	Median	33%	Median	42%	Median	21%



For a quick comparison, the chart below compares the Taylor / Hutto region’s median rating of “Good” for all factors with that same rating for all locations surveyed within the past eighteen to twenty-four months. The Taylor / Hutto area is above the median in Worker Reliability and Attitudes and slightly above in Worker Productivity.

**“QUICK LOOK” COMPARISON
EMPLOYERS RATING OF “MEDIAN GOOD” FOR ALL FACTORS
The Taylor / Hutto Area Labor Shed /
Locations Previously Surveyed**



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 Taylor / Hutto 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 Taylor / Hutto 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 Taylor / Hutto 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 Taylor / Hutto 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 \$8.00 per hour or below to \$30.00 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 \$12.39 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 \$8.94 per hour or less, the median \$10.52 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
\$12.39 or Less	\$8.94 or Less	\$10.54 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 \$25.54 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 \$15.75 or more, the median \$19.57 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
\$25.54 or More	\$15.75 or More	\$19.80 or More	\$25.07 or More



The following charts compare the percentages of underemployed workers in the Taylor / Hutto 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 Taylor / Hutto region is referred to as “labor shed”.

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



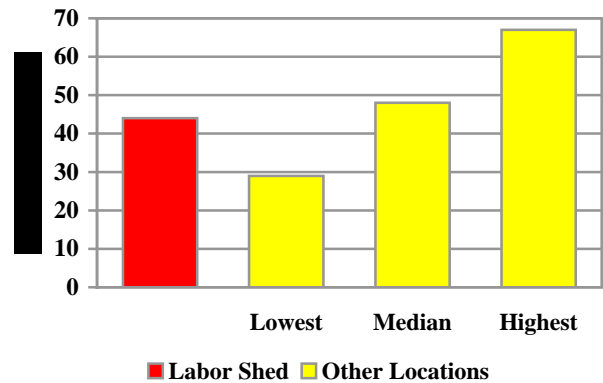
COMPARISON OF EXPERIENCE UNDEREMPLOYED WORKERS

The Taylor / Hutto Area /
Locations Surveyed Over the Past 18 Months

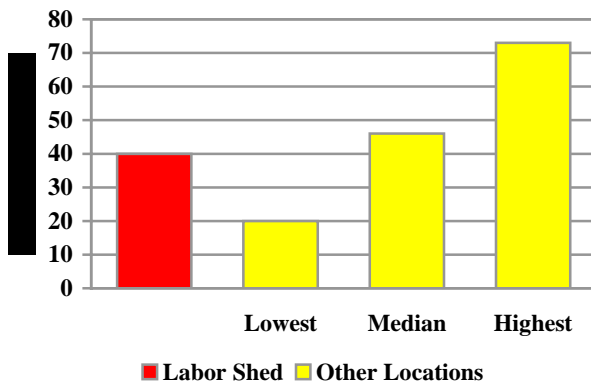
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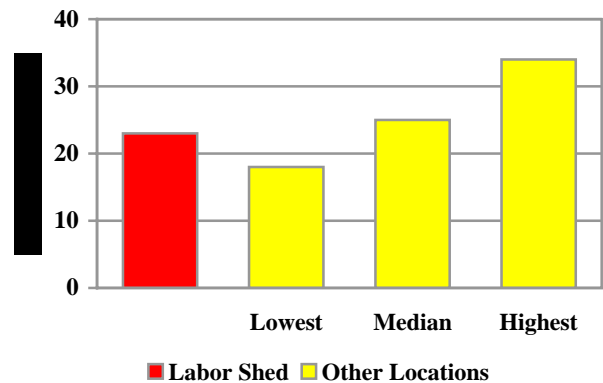
WAREHOUSE / DISTRIBUTION / TRANSPORTATION



MANUFACTURING / ASSEMBLY / FABRICATION



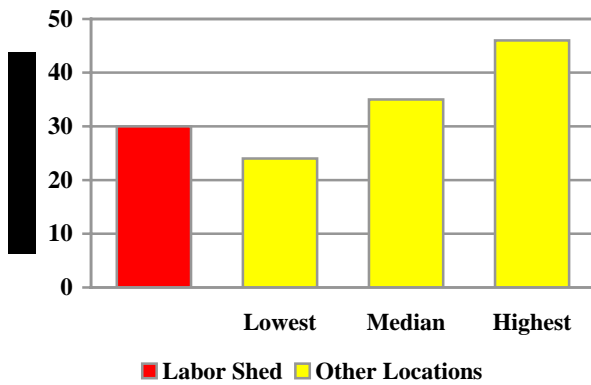
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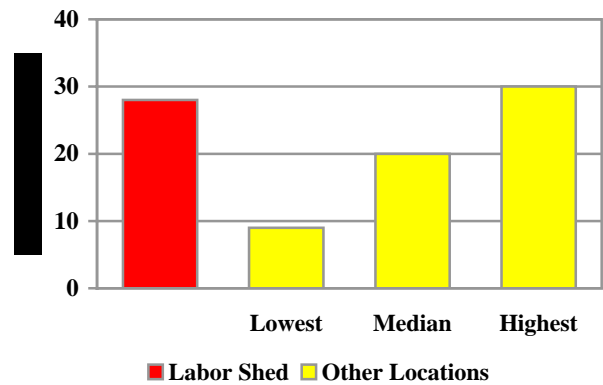
**COMPARISON OF EXPERIENCE
UNDEREMPLOYED WORKERS**

**The Taylor / Hutto Area /
Locations Surveyed Over the Past 18 Months**

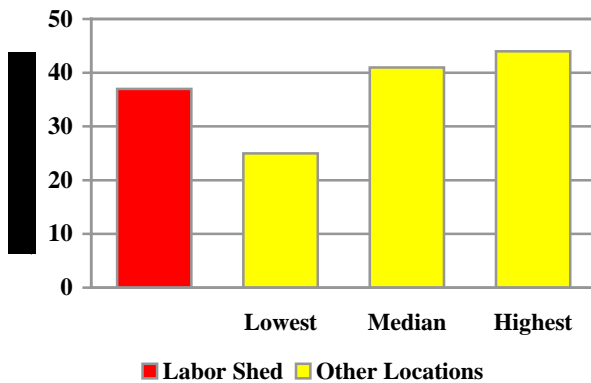
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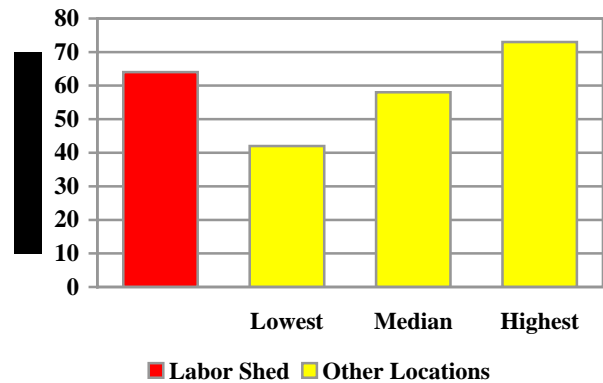
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**INFORMATION TECHNOLOGY /
TELECOMMUNICATIONS /
COMPUTER**

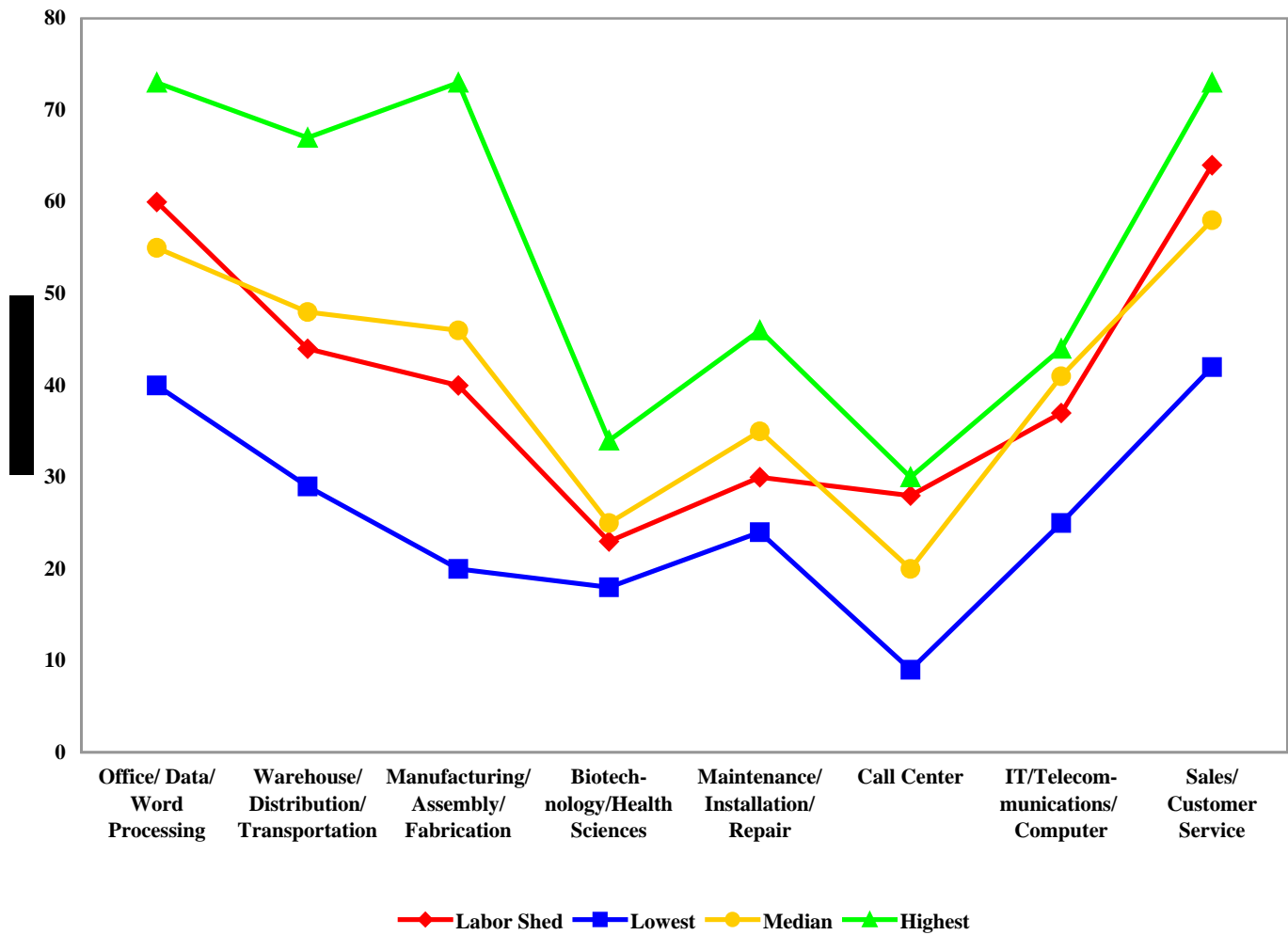


**SALES /
CUSTOMER SERVICE**



**SUMMARY COMPARISON OF EXPERIENCE
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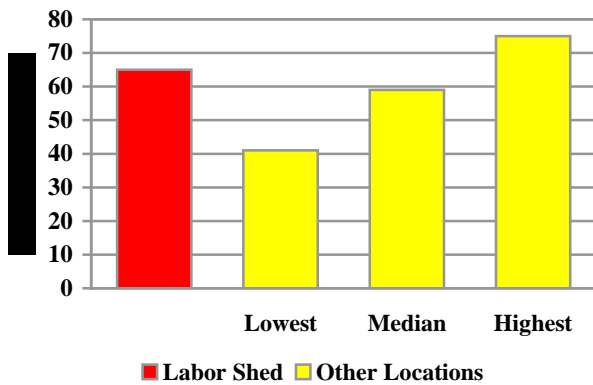
**The Taylor / Hutto Area /
Locations Surveyed Over the Past 18 Months**



COMPARISON OF SKILLS UNDEREMPLOYED WORKERS

**The Taylor / Hutto Area /
Locations Surveyed Over the Past 18 Months**

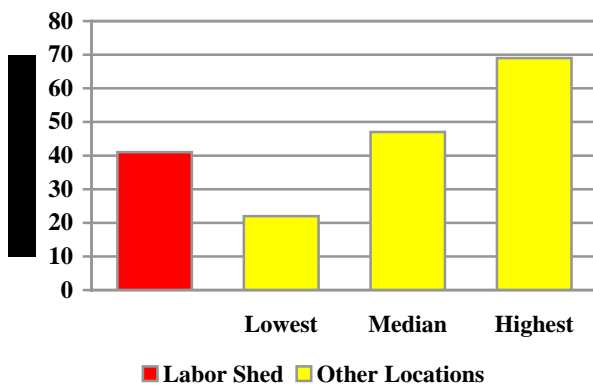
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WAREHOUSE / MATERIALS HANDLING



MANUFACTURING / ASSEMBLY / FABRICATION



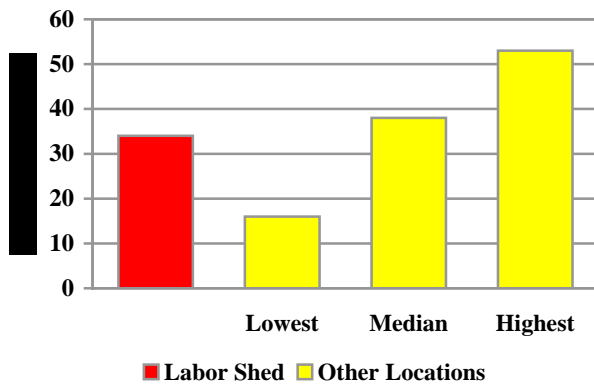
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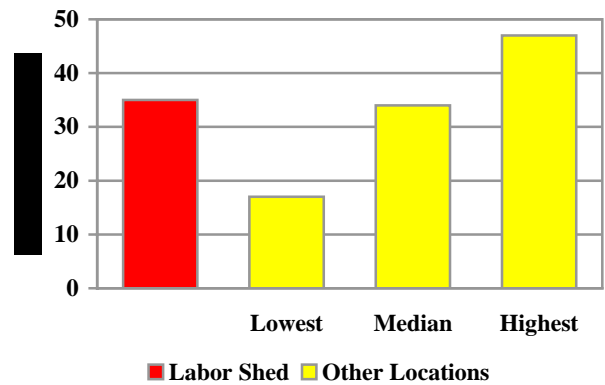
**COMPARISON OF SKILLS
UNDEREMPLOYED WORKERS**

**The Taylor / Hutto Area /
Locations Surveyed Over the Past 18 Months**

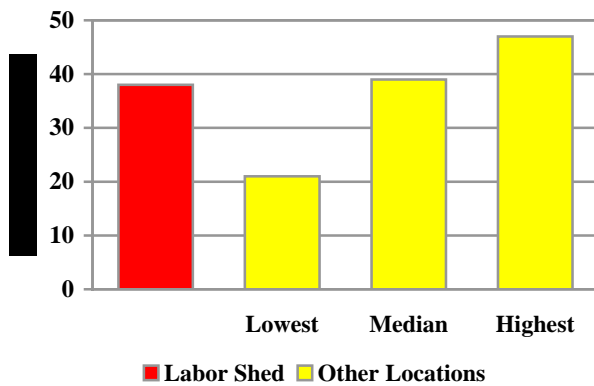
**MAINTENANCE /
INSTALLATION / REPAIR**



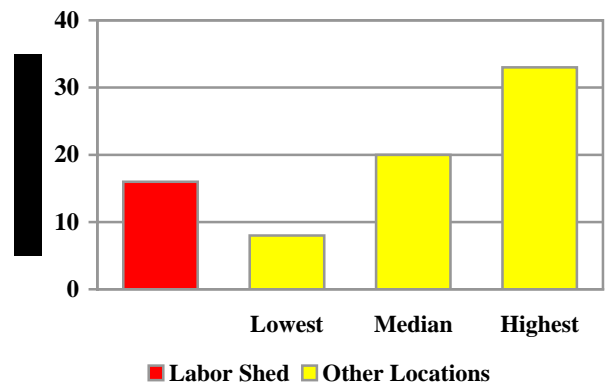
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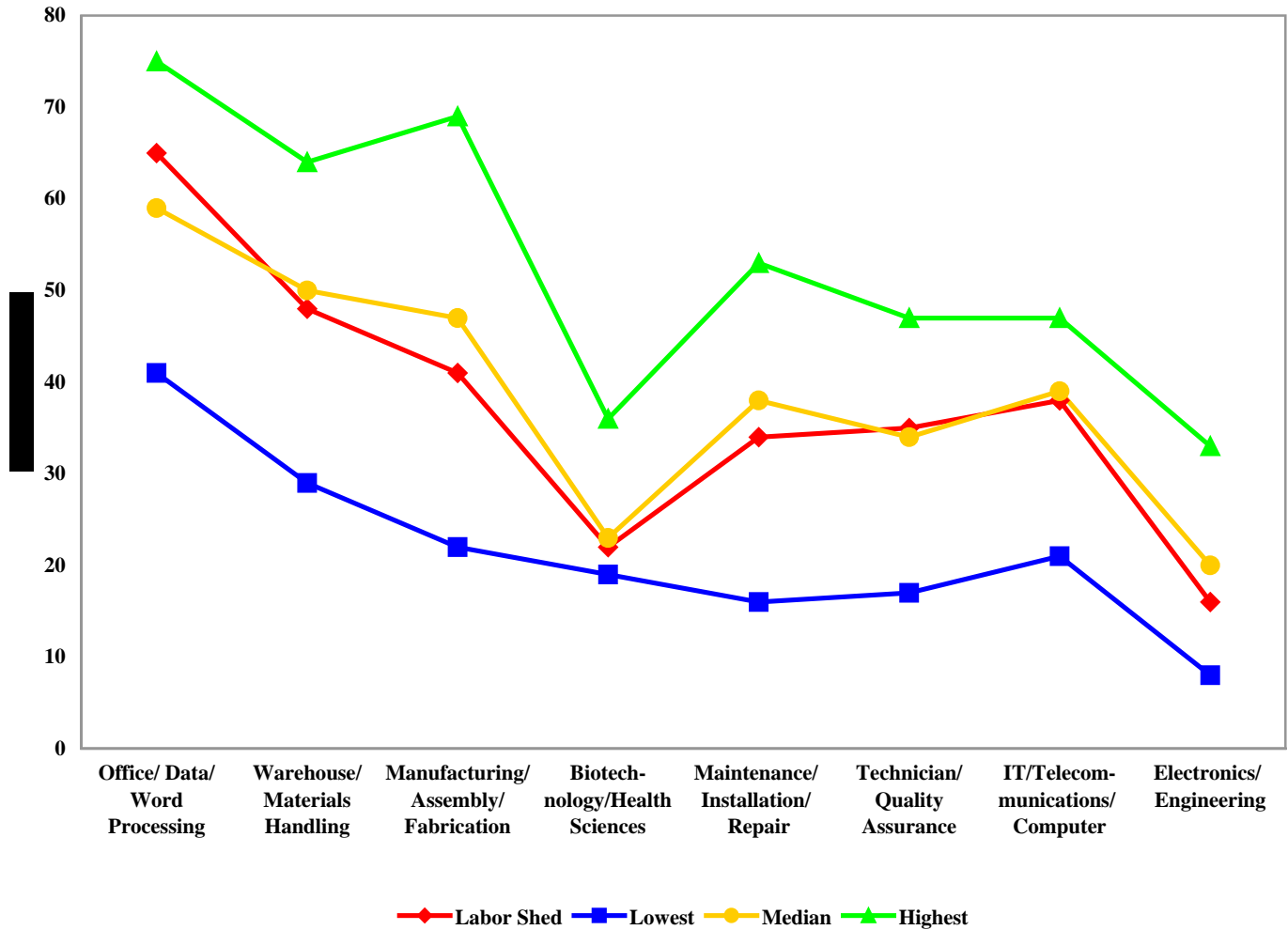
**INFORMATION TECHNOLOGY /
TELECOMMUNICATIONS /
COMPUTER**



ELECTRONICS / ENGINEERING



**SUMMARY COMPARISON OF SKILLS
UNDEREMPLOYED WORKERS
The Taylor / Hutto Area /
Locations Surveyed Over the Past 18 Months**



CLOSING REMARKS

The foregoing report represents an assessment of the underemployment that exists in the Taylor / Hutto 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 Taylor / Hutto 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 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 Taylor / Hutto region, including their cost, skills, and experience, is the focus of this report, the data should be interpreted in a comparative perspective just as the corporate site selector will in deciding among competing locations.

For Informational Purposes:

The Taylor / Hutto Area Civilian Workforce.....	80,200
Largest Workforce Surveyed by The Pathfinders	3,452,000
Median Workforce Surveyed by The Pathfinders	138,400
Smallest Workforce Surveyed by The Pathfinders.....	3,350
Number of Locations Surveyed by The Pathfinders.....	287



AVAILABLE WORKERS INTEREST IN TRAINING COURSES

A component was added to this survey which was designed to determine possible interest in training courses on the part of the 18,000 available workers in the Taylor / Hutto workforce. The primary purpose of including this component was to produce data which would provide guidance in the establishment of training programs which will more precisely meet the needs of the public and the business community in the Taylor / Hutto area.

The extent to which interest is strong and those individuals might actually enroll in a training program is not known. That would obviously be influenced by scheduling, costs, length of the course and other factors. Perhaps the most dominant of those factors is the extent to which those individuals are aware of the course offering, its scheduling, cost and how and where to enroll.

However, this survey presents the relative interest in training courses of those workers in the Taylor / Hutto area who are available candidates for employment with a new or expanding business. The available workforce is comprised of three groups – the underemployed, the unemployed who are actively seeking work, and the unemployed who are considering re-entering the workforce. In the tables that follow, it should be noted that many of the respondents indicated interest in more than one program, therefore, the percent total will not equal 100.

As indicated, among the available workers, the greatest percentage of training interest (61%) was in supervisory/human resources programs, followed by 43% interest in computer software applications such as Word or Excel courses; health care; and, computer programming.



18,000 AVAILABLE WORKERS
TAYLOR / HUTTO AREA
INTEREST IN TRAINING COURSES

Type of Training Course*	Number of Persons	Percentage
Supervisory or Human Resources	11,000	61%
Computer Software Applications such as Word or Excel	7,700	43%
Health Care	7,700	43%
Computer Programming	7,700	43%
Computer Maintenance or Repair	6,500	36%
Real Estate or Insurance	6,300	35%
Technical Trades such as Blueprint Reading or Electrical	5,200	29%
Industrial Machine Operations	4,700	26%
Food Service or Hospitality	4,700	26%
Construction Trades such as Carpentry or Welding	4,100	23%
Auto or Maintenance Mechanics	3,200	18%
GED or Basic Reading, Writing and Arithmetic	3,200	18%
ESL (English as a Second Language)	3,100	17%
Cosmetology or Fashion Design	3,100	17%
Other	400	2%

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





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