



GAP ANALYSIS REGIONAL OVERVIEW

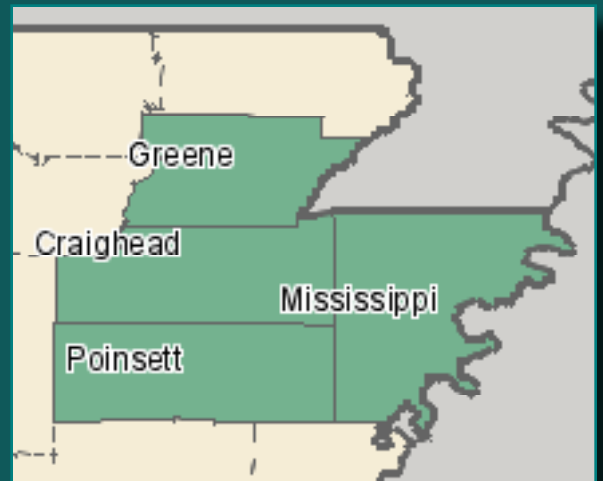
REGIONAL DEMOGRAPHICS,
EDUCATIONAL ATTAINMENT, AND
TOP INDUSTRY & OCCUPATION ANALYSIS



*Prepared for:
Arkansas Northeastern College
Service Area*

*Craighead, Greene, Mississippi, and
Poinsett Counties*

Data range: 2006–2011



INTRODUCTION

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Region

Arkansas Northeastern College
Service Area: *Craighead, Greene, Mississippi, and Poinsett Counties*
Projection period: 2006–2011

Region Definition

This analysis is comprised of a customized dataset with demographic, industry, and occupation data for identified counties provided by the Arkansas Department of Higher Education (ADHE) and the Arkansas Association of Two-Year Colleges (AATYC). EMSI has aggregated these statistics for this customized region.

Report Outline

Demographics

The first section will provide an overview of the region’s demographics. This section will simply highlight the regional breakdown with regard to age, gender and projected change over the next five years. In addition, the region’s demographics are benchmarked against the state.

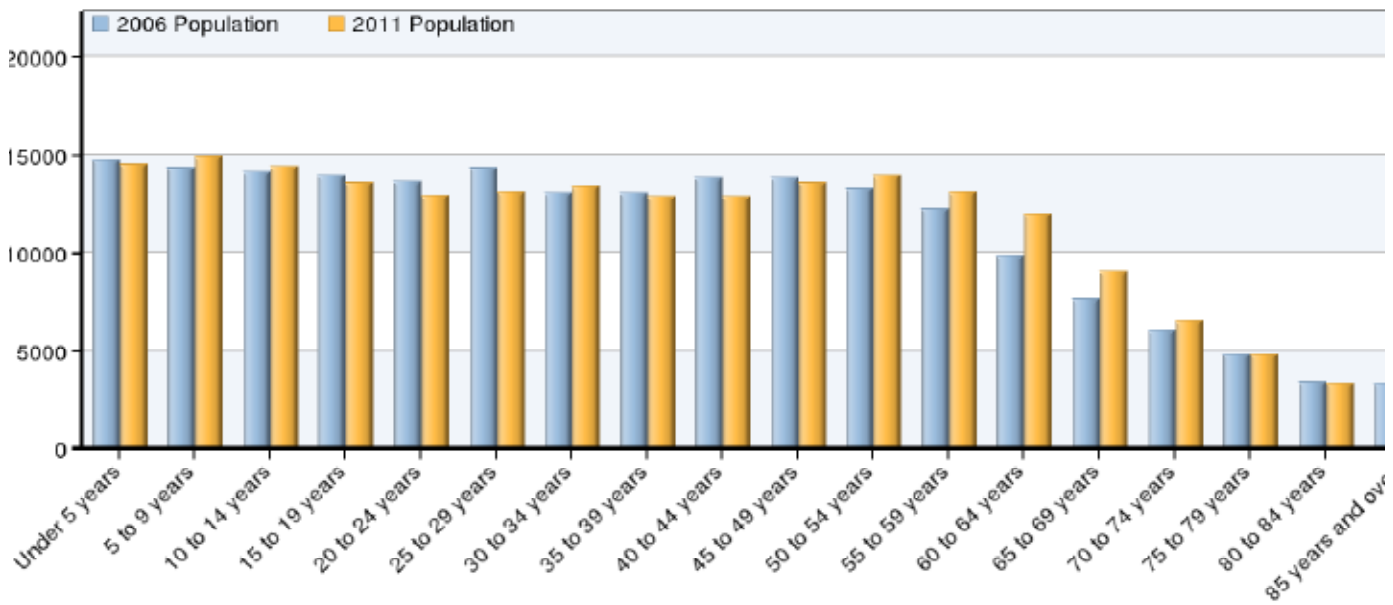
Regional Educational Attainment

The second section will provide an overview of the educational attainment within the region. Educational attainment is based on the level of education achieved by the population over the age of 25.

Industry and Occupation Overview

The third section will discuss the industries and occupations most critical to the economy. These industries will be selected based on standard metrics. This section will also (1) highlight occupations that are projected to experience the most growth within the critical industry sectors, (2) provide the education levels necessary to work in these occupations, and (3) indicate the major declining occupations for each industry sector.

DEMOGRAPHICS: 2006–2011



The current population of the region is **199,649**. Over the next five years the population is projected to increase by roughly **1%**.

Accordingly, in five years **74%** of the population will be under the age of 55.

Region	2006 Total	2011 Total	Change	% Change
Region	199,649	202,554	2,905	1%
State	2,797,096	2,893,966	96,870	3%

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In five years, **26%** of the population is projected to be over the age of 55.

Region	2006 Total	2006 55+	% 55+	2011 Total	2011 55+	% 55+
Region	199,649	47,333	23.7%	202,554	52,350	25.8%
State	2,797,096	706,939	25.3%	2,893,966	788,514	27.2%

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Males and females will be evenly distributed.

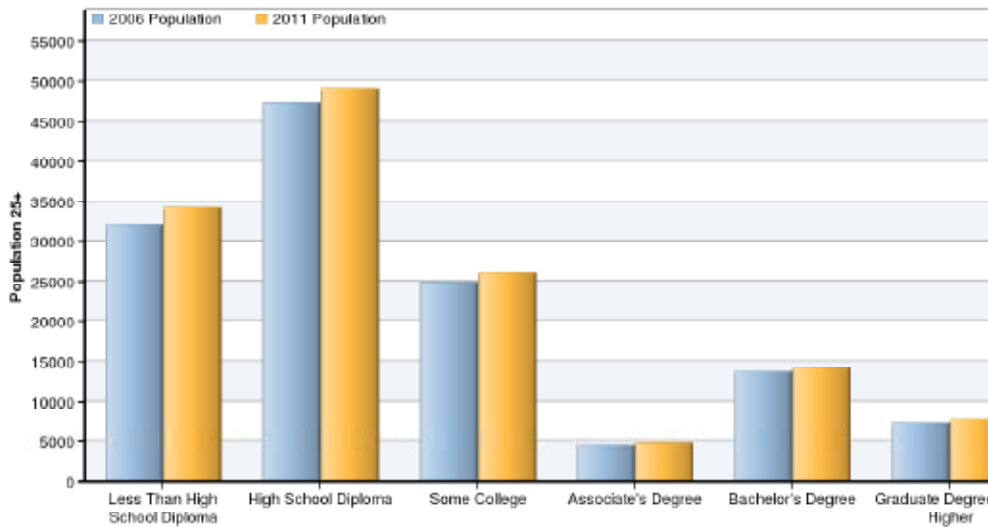
Gender	2006 Population	2011 Population	Change	% Change
Males	96,546	98,006	1,460	1.5%
Females	103,103	104,548	1,445	1.4%
Total	199,649	202,554	2,905	1.5%

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Age	2011 Population	% of Total Population
Under 5 years	14,532	7.2%
5 to 9 years	14,913	7.4%
10 to 14 years	14,438	7.1%
15 to 19 years	13,564	6.7%
20 to 24 years	12,937	6.4%
25 to 29 years	13,116	6.5%
30 to 34 years	13,425	6.6%
35 to 39 years	12,868	6.4%
40 to 44 years	12,884	6.4%
45 to 49 years	13,574	6.7%
50 to 54 years	13,952	6.9%
Total	150,204	74.2%

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REGIONAL EDUCATIONAL ATTAINMENT: 2006 - 2011



Note: Educational attainment is based on the education level of the population over the age of 25.

Current High School Completion (but not college):

- Regionally, 55% of the population has completed high school but not college.
- Statewide, 57% of the population has completed high school but not college.
- Nationally, 51% of the population has completed high school but not college.

Current College Completion:

- Regionally, 4% A.A., 11% B.S., and 6% Grad.
- Statewide, 4% A.A., 12% B.S., and 6% Grad.
- Nationally, 6% A.A., 18% B.S., and 10% Grad.

Projected High School Completion (but not college):

- Regionally, 55% of the population will have completed high school but not college.
- Statewide, 56% of the population will have completed high school but not college.
- Nationally, 50% of the population will have completed high school but not college.

Projected College Completion:

- Regionally, 3% A.A., 11% B.S., and 6% Grad.
- Statewide, 4% A.A., 12% B.S., and 6% Grad.
- Nationally, 6% A.A., 18% B.S., and 11% Grad.

Current Educational Attainment

Education Level	2006 Pop 25+	% of Pop 25+	State % Pop 25+	Nat. % Pop 25+
Less Than High School Diploma	31,973	25%	21%	15%
High School Diploma	47,314	36%	35%	29%
Some College	24,872	19%	22%	22%
Associate's Degree	4,539	4%	4%	6%
Bachelor's Degree	13,680	11%	12%	18%
Graduate Degree and Higher	7,291	6%	6%	10%
Total	129,670	100%	100%	100%

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Projected Educational Attainment

Education Level	2011 Pop 25+	% of Pop 25+	State % Pop 25+	Nat. % Pop 25+
Less Than High School Diploma	34,180	25%	21%	14%
High School Diploma	49,140	36%	34%	28%
Some College	26,078	19%	22%	22%
Associate's Degree	4,756	3%	4%	6%
Bachelor's Degree	14,322	11%	12%	18%
Graduate Degree and Higher	7,667	6%	6%	11%
Total	136,142	100%	100%	100%

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INDUSTRY & OCCUPATION OVERVIEW: 2006-2011

Introduction

To provide the best estimation of which industries are most critical to the regional economy we have ranked industries at the 2-digit NAICS level by the following metrics:

- Industry size (in terms of jobs),
- Growth (jobs and % change),
- Earnings per worker (EPW),
- Shift share (or competitive effect), and
- Location quotient (or regional concentration).

For this analysis, we have weighted industry size, change, and competitive effect so the results should reflect area industries that are (1) larger, (2) growing, and (3) regionally competitive.

After the top industry sectors are selected we rank the top occupations within each industry. To rank the occupations we have simply selected those occupations that are larger, and are projected to growth or decline with some significance over the next five years. In addition, the analysis includes earnings and education level associated with each occupation.

As with the previous sections, this section is primarily data-driven, and knowledge of the local situation is usually required to interpret all the data correctly. This section is primarily meant as an overview of the economy that can be used as a point of departure for planning discussions.

Metrics Overview

Industry performance is a many-faceted concept that cannot be easily reduced to a single metric. Accordingly, EMSI uses five major metrics to evaluate industry performance: jobs, earnings, growth, shift share, and location quotient.

Jobs simply ranks industries by number of jobs. This metric certainly reveals important industries in the regional economy, but it does not tell a complete story. For example, a large industry may be in sharp decline, or may provide mostly low-wage jobs, or may be dependent on more basic export-oriented industries. EMSI's ranking of industries by jobs is thus balanced by using the perspectives of other metrics.

Growth can highlight regional industries that may be small or mid-sized but show strong performance and have high potential for future growth. Growth ranking is done in terms of number of jobs added.

Average yearly earnings per worker (EPW), which in EMSI's data includes salary and benefits, indicates the quality of jobs within each industry.

Shift share, or "regional competitiveness," is a way of balancing the growth figures by isolating growth that can be attributed to regional causes rather than simply to national economic or industry trends. Shift share provides the "Competitive Effect," which is based on (1) total regional job growth minus (2) the National Growth Effect (industry growth expected due to performance of national economy as a whole) and (3) Industrial Mix Effect (regional ind. growth expected due to national trends in that same industry).

Location quotient, or "industry concentration," is a way of quantifying how concentrated an industry is in a region. For example, if an industry is responsible for .5% of national jobs but 1.5% of regional jobs, then it has an LQ of 3 in the region. By showing regional "specialties," this metric highlights exporting sectors that bring money into the region (and thus form the base for other dependent industries).

INDUSTRY & OCCUPATION OVERVIEW: 2006-2011

The table below is a top level view of the regional economy sorted by number of jobs.

Code	Description	Region				State				
		2006 Jobs	2011 Jobs	Change	% Change	EPW	State 2006	State 2011	State % Change	State EPW
31-33	Manufacturing*	21,325	22,415	1,090	5%	\$53,618	208,429	209,733	1%	\$46,469
90	Government**	14,181	14,777	596	4%	\$38,054	216,109	226,422	5%	\$45,277
62	Health care and social assistance*	12,974	14,801	1,827	14%	\$39,969	161,225	183,978	14%	\$37,824
44-45	Retail trade	12,096	12,104	8	0%	\$21,183	170,784	177,169	4%	\$22,524
56	Administrative and waste services	6,774	7,997	1,223	18%	\$16,509	82,269	97,654	19%	\$18,204
72	Accommodation and food services	6,684	7,264	580	9%	\$12,391	94,630	102,968	9%	\$13,542
11	Agriculture, forestry, fishing and hunting	6,247	5,891	(356)	(6%)	\$25,919	73,265	70,959	(3%)	\$21,366
23	Construction**	5,855	6,174	319	5%	\$29,098	98,015	103,015	5%	\$31,874
81	Other services, except public administration	4,851	5,338	487	10%	\$14,322	86,648	95,269	10%	\$17,921
48	Transportation and warehousing*	3,554	3,767	213	6%	\$34,431	80,645	88,290	9%	\$43,577
42	Wholesale trade**	3,462	3,483	21	1%	\$44,166	52,614	53,935	3%	\$53,069
54	Professional and technical services	2,844	2,952	108	4%	\$37,852	60,007	66,485	11%	\$48,616
52	Finance and insurance	2,580	2,668	88	3%	\$34,523	50,157	52,553	5%	\$41,303
53	Real estate and rental and leasing	2,551	2,746	195	8%	\$16,980	44,120	49,305	12%	\$19,532
51	Information	2,124	1,833	(291)	(14%)	\$47,014	22,545	23,437	4%	\$63,575
71	Arts, entertainment, and recreation	852	1,020	168	20%	\$18,681	17,411	19,023	9%	\$15,530
61	Educational services	618	708	90	15%	\$15,173	18,143	21,410	18%	\$20,462
55	Management of companies and enterprises	299	316	17	6%	\$61,659	25,096	28,511	14%	\$76,968
22	Utilities	155	174	19	12%	\$71,170	7,192	7,456	4%	\$93,629
21	Mining	122	108	(14)	(11%)	\$27,394	8,220	8,523	4%	\$49,376
		110,148	116,535	6,388	6%	\$33,879	1,577,523	1,686,093	7%	

Source: Economic Modeling Specialists, Inc. • 2/07

* Focus Industry

** Industries also showing strong regional performance, but not analyzed in this report.

INDUSTRY & OCCUPATION OVERVIEW: 2006-2011

Critical Regional Industries

Industries most critical to this region's economy are:

- ♦ Manufacturing
- ♦ Government
- ♦ Health care and social assistance
- ♦ Construction
- ♦ Transportation and warehousing
- ♦ Wholesale trade

Highest Growth ('06 - '11):

- ♦ Health care and social assistance
(1,827 jobs)
- ♦ Administrative and waste services
(1,223 jobs)
- ♦ Manufacturing
(1,090 jobs)
- ♦ Government
(596 jobs)
- ♦ Other services, except public administration
(487 jobs)
- ♦ Construction
(319 jobs)

Declining Industries ('06-'11):

- ♦ Agriculture
(-6%)
- ♦ Information
(-14%)

Focus Industries

For this analysis we have selected three top level industries for a more detailed analysis. Again, these were selected based on strong performance in a combination of indicators: regional growth, earnings, number of jobs and "regional competitiveness." These industries are:

- ♦ Health care and social assistance
- ♦ Manufacturing
- ♦ Transportation and warehousing

Regional Growth (State Growth)

♦ Manufacturing	5% (1%)
♦ Government	4% (5%)
♦ Health care and social assistance	14% (14%)
♦ Construction	5% (5%)
♦ Transportation and warehousing	6% (9%)
♦ Wholesale trade	1% (3%)

INDUSTRY & OCCUPATION OVERVIEW: 2006-2011

Critical Health care and social service occupations:

The specific occupations within the health care sector that are projected to undergo the largest changes over the next five years. Regional projections, change, replacement jobs, average hourly earnings and education level are included.

Health Care and Social Assistance

SOC Code	Description	2006 Jobs	2011 Jobs	Change	% Change	Replacement Jobs	% New & Rep.	EPW	Education Level
29-1111	Registered nurses	1,656	1,956	300	18%	165	28%	\$19.88	Associate's degree
31-1012	Nursing aides, orderlies, and attendants	1,360	1,502	142	10%	87	17%	\$8.55	Postsecondary vocational award
39-9021	Personal and home care aides	592	704	112	19%	45	27%	\$6.55	Short-term on-the-job training
43-4171	Receptionists and information clerks	724	822	98	14%	86	25%	\$8.71	Short-term on-the-job training
29-2061	Licensed practical and licensed vocational nurses	1,028	1,126	98	10%	109	20%	\$13.01	Postsecondary vocational award
21-1093	Social and human service assistants	496	554	58	12%	42	20%	\$10.75	Moderate-term on-the-job training
31-9092	Medical assistants	200	258	58	29%	17	38%	\$9.77	Moderate-term on-the-job training
31-1011	Home health aides	286	342	56	20%	18	26%	\$8.42	Short-term on-the-job training
31-9091	Dental assistants	144	186	42	29%	19	42%	\$12.02	Moderate-term on-the-job training
		6,487	7,451	964	15%	588	24%	\$12.25	

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Critical Transportation & warehousing occupations:

The specific occupations within the transportation and warehousing sector that are projected to undergo the largest changes over the next five years. Regional projections, change, replacement jobs, average hourly earnings and education level are included.

Transportation and Warehousing

SOC Code	Description	2006 Jobs	2011 Jobs	Change	% Change	Replacement Jobs	% New & Rep.	EPW	Education Level
53-3032	Truck drivers, heavy and tractor-trailer	2,067	2,162	95	5%	167	13%	\$13.09	Moderate-term on-the-job training
53-3033	Truck drivers, light or delivery services	850	913	63	7%	38	12%	\$9.20	Short-term on-the-job training
53-3031	Driver/sales workers	891	945	54	6%	72	14%	\$9.01	Short-term on-the-job training
53-7062	Laborers and freight, stock, and material movers, hand	2,872	2,904	32	1%	467	17%	\$8.12	Short-term on-the-job training
		6,679	6,925	244	4%	744	15%	\$9.91	

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INDUSTRY AND OCCUPATION OVERVIEW: 2006-2011

Critical Manufacturing Occupations:

The specific occupations within the manufacturing sector that are projected to undergo the largest changes over the next five years. Regional projections, change, replacement jobs, average hourly earnings and education level are included.

Manufacturing

SOC Code	Description	2006 Jobs	2011 Jobs	Change	% Change	Replacement Jobs	% New & Rep.	EPW	Education Level
51-9198	Helpers--Production workers	1,940	2,095	155	8%	266	22%	\$10.27	Short-term on-the-job training
17-2199	Engineers, all other	133	191	58	44%	11	52%	\$25.95	Bachelor's degree
51-2092	Team assemblers	1,729	1,780	51	3%	222	16%	\$10.55	Moderate-term on-the-job training
51-4121	Welders, cutters, solderers, and brazers	1,264	1,312	48	4%	176	18%	\$12.23	Long-term on-the-job training
51-2022	Electrical and electronic equipment assemblers	194	226	32	16%	28	31%	\$16.46	Short-term on-the-job training
17-2141	Mechanical engineers	154	186	32	21%	20	34%	\$24.92	Bachelor's degree
51-9196	Paper goods machine setters, operators, and tenders	186	214	28	15%	19	25%	\$14.96	Moderate-term on-the-job training
		5,601	6,004	404	7%	742	20%	\$11.90	

Source: Economic Modeling Specialists, Inc. • 2/07

INDUSTRY AND OCCUPATION OVERVIEW: 2006-2011

Declining Occupations

These are the top declining occupations for the region. Included in this analysis are current and projected regional jobs, change, average hourly earnings, current and projected state jobs and education level.

Declining Occupations

SOC Code	Description	2006 Jobs	2011 Jobs	Change	% Change	EPW	State 2006	State 2011	State % Change	State EPW	Education Level
43-5081	Stock clerks and order fillers	1,335	1,216	(119)	(9%)	\$8.09	17,561	16,304	(7%)	\$8.93	Short-term on-the-job training
51-4031	Cutting, punching, and press machine setters, operators, and tenders, metal and plastic	829	771	(58)	(7%)	\$10.56	3,719	3,444	(7%)	\$11.47	Moderate-term on-the-job training
51-4021	Extruding and drawing machine setters, operators, and tenders, metal and plastic	277	233	(44)	(16%)	\$12.50	2,079	1,958	(6%)	\$13.73	Moderate-term on-the-job training
41-2011	Cashiers, except gaming	2,163	2,122	(41)	(2%)	\$6.82	33,627	33,669	0%	\$7.01	Short-term on-the-job training
53-7063	Machine feeders and offbearers	548	518	(30)	(5%)	\$10.58	3,622	3,331	(8%)	\$10.51	Short-term on-the-job training
51-4072	Molding, coremaking, and casting machine setters, operators, and tenders, metal and plastic	291	267	(24)	(8%)	\$9.27	2,355	2,319	(2%)	\$11.35	Moderate-term on-the-job training
43-4151	Order clerks	169	147	(22)	(13%)	\$9.92	1,890	1,712	(9%)	\$10.78	Short-term on-the-job training
45-2092	Farmworkers and laborers, crop, nursery, and greenhouse	591	571	(20)	(3%)	\$6.05	9,057	8,932	(1%)	\$6.78	Short-term on-the-job training
51-6031	Sewing machine operators	112	92	(20)	(18%)	\$7.80	2,576	2,255	(12%)	\$8.06	Moderate-term on-the-job training
		6,312	5,936	-378	6%	\$13.30	76,486	73,925	7%		

Source: Economic Modeling Specialists, Inc. • 2/07

ABOUT EMSI AND THE DATA

About EMSI

EMSI provides integrated data, web-based tools, and consulting services to analyze regional economies intelligently in terms of economic base, industry and employment trends, economic impact simulations, industry clusters, regional competitiveness, human capital, labor market supply and demand, and demographics. EMSI's integrated database is based on 70 government sources, making it much more comprehensive, accurate, and detailed than any single source available. In addition, EMSI's web-based suite of analysis tools makes the information easy to access and use. If you would like to learn more about EMSI or its products and services, please visit us online at www.economicmodeling.com, or call 1-866-999-3674.

EMSI Data

As a data provider, we gather and harmonize data from 70 state and federal sources, creating in-house a comprehensive and current database that is unsurpassed for its breadth and detail. Industry, workforce, and demographic data are available from state and county levels all the way down to individual ZIP codes, and users can build custom regions from county and ZIP code areas. In addition, by combining dozens of data sources, we can fill gaps in individual sources (such as suppressions and missing proprietors)—yielding a composite database that exploits the strengths of each source. Finally, our database is updated biannually, so our subscribers have access to the most complete *and* up-to-date information on the market.

EMSI's StrategicAdvantage™ (SA)

The report was created primarily using the Economic Forecaster, one of four modules within SA. Economic Forecaster is a powerful, labor market projection tool that will allow workforce and economic developers to create detailed industry, occupation and demographic analyses that can be used to better analyze the regional economy and workforce.

EMSI's **StrategicAdvantage™** web-based analysis suite capitalizes on the company's premium database to produce accessible analysis and reports. The suite includes four main modules—**Economic Forecaster**, **Economic Impact**, **Career Pathways** and **Educational Analyst**—which each include several analysis tools that allow users to create customizable tables, graphs, and maps with the click of a button.

With EMSI's **StrategicAdvantage™** workforce professionals and economic developers can:

- Perform instant analyses with an intuitive web-based interface,
- Understand current and future trends in a regional economy (industries, occupations, demographics) with 10-year projections,
- Create presentation-ready graphs, tables and maps,
- Draw the right businesses to a region and maximize return on investment,
- Run impact scenarios of businesses entering, leaving, growing, or shrinking in a region,
- Know the skills embedded in the workforce and required by specific occupations,
- Minimize unemployment and transition workers into high-demand, high-wage occupations, and
- Identify the businesses and workers a region needs to recruit and retain in order to make its economy thrive.

ABOUT EMSI AND THE DATA

Selected EMSI Data Sources

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About This Report

This Gap Analysis Regional Overview provided by EMSI, in partnership with the Arkansas Department of Higher Education (ADHE) and the Arkansas Association of Two-Year Colleges (AATYC) is designed to provide a top level view of regional demographics, educational attainment, top-ranking industries and associated occupations as defined by several standard metrics. The goal of this report is to assist regional planners in their understanding of the region's labor market. The report is primarily data-driven, with some basic interpretation included to help focus the attention of local stakeholders and policymakers. Knowledge of the local situation is also required to interpret all the data correctly.



EDUCATIONAL ATTAINMENT

GROWTH

JOBS

EARNINGS



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