



GREATER DUBUQUE DEVELOPMENT CORPORATION

LABORSHED ANALYSIS



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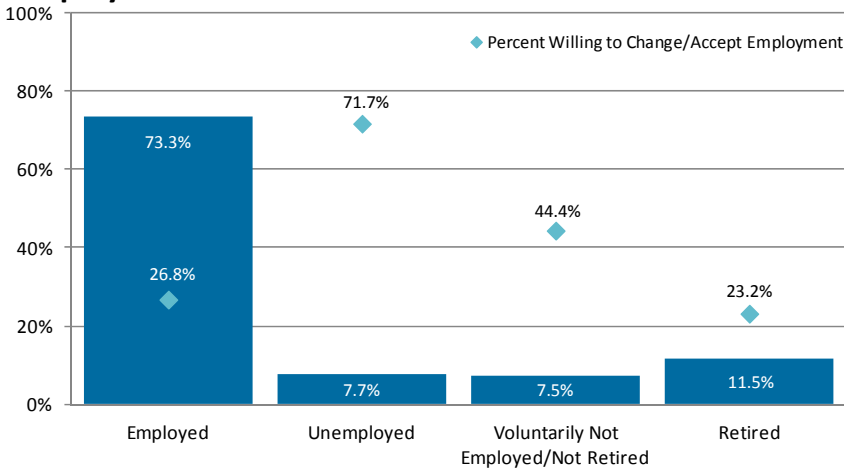
Multi-Modal Access to the Global Marketplace

A STUDY IN WORKFORCE CHARACTERISTICS
RELEASED AUGUST 2012

Laborshed Studies

A Laborshed is defined as the area or region from which an employment center draws its commuting workers. To determine the approximate boundaries of the Dubuque Laborshed area, local employers supplied the ZIP code listings of where each of their employees reside. This Laborshed analysis addresses underemployment, the availability and willingness of current and prospective employees to change employment within the workforce, current and desired occupations, wages, hours worked and distance willing to commute to work.

Employment Status*



*Employment status is self-identified by the survey respondent. The unemployment percentage above does not reflect the unemployment rate published by the U.S. Bureau of Labor Statistics, which applies a stricter definition.

Total Potential Labor Force: 375,692 (entire Laborshed Area)

Estimated Number of Individuals Very Likely or Somewhat Likely to Change or Accept Employment (51,320)

- 40,959 Employed
- 2,271 Unemployed
- 2,359 Voluntarily Not Employed, Not Retired
- 5,731 Retired

Underemployment

The underemployed are composed of individuals who are working fewer than 35 hours per week but desire more hours; who are working at wages equal to or less than the national poverty level; and/or who are working in positions that do not meet their skill or education levels, or worked for higher wages at previous employment.

- 2.0% Inadequate hours (819 people)
- 2.5% Mismatch of skills (1,024 people)
- 1.3% Low income (532 people)
- 4.8% Total estimated underemployment (1,966 people)

Individuals may be underemployed for more than one reason, but are counted only once for total estimated underemployment.

Industrial Classification of the Employed

Industry	% of Laborshed	# of Employed	% Employed	% Willing to Change Employment	% Unemployed
Education	17.5%	48,192	73.9%	20.0%	4.5%
Manufacturing	16.7%	45,989	68.1%	19.4%	9.9%
Healthcare & Social Services	14.8%	40,757	75.3%	23.6%	11.0%
Wholesale & Retail Trade	13.4%	36,901	72.5%	42.0%	13.0%
Transportation, Communication & Utilities	7.5%	20,654	71.8%	39.3%	5.1%
Professional Services	7.3%	20,103	81.8%	29.6%	12.1%
Finance, Insurance & Real Estate	5.6%	15,421	70.0%	33.3%	3.3%
Public Administration & Government	4.6%	12,668	65.4%	17.6%	0.0%
Personal Services	4.3%	11,841	88.9%	31.3%	0.0%
Agriculture, Forestry & Mining	4.0%	11,015	83.3%	6.7%	5.6%
Construction	3.5%	9,638	81.3%	30.8%	12.5%
Entertainment & Recreation	0.8%	2,203	*	*	*

*Insufficient survey data/refused

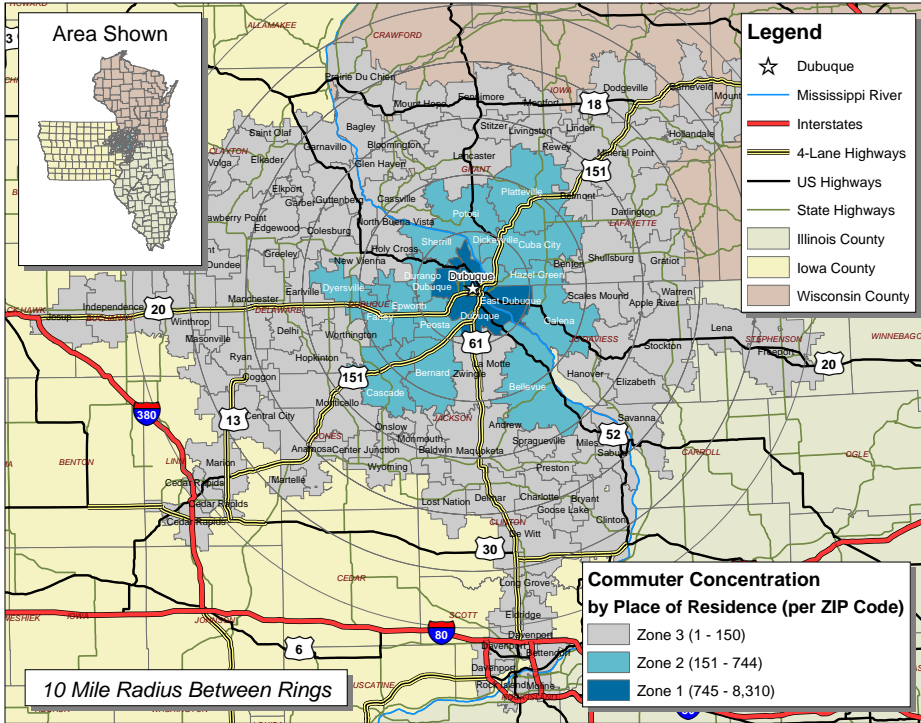
Survey respondents from the Dubuque Laborshed area were asked to identify the industry in which they are currently working. The largest concentration of workers are employed in the education industry.

Quick Facts

(Employed - willing to change employment)

- 25.4% are working multiple jobs
- Currently working an average of 41 hours per week
- Average age is 47 years old
- 26.5% currently working within the professional, paraprofessional & technical occupational category followed by 21.4% within the production, construction & material handling occupational category
- Most frequently identified job search sources:
 - Internet
 - www.accessdubuque.com
 - www.monster.com
 - www.iowaworkforce.org
 - Local/Regional newspapers
 - Telegraph Herald - Dubuque
 - Cedar Rapids Gazette
 - Quad City Times
 - Networking through friends, family and acquaintances
 - Local IowaWORKS Centers

Dubuque Laborshed Area



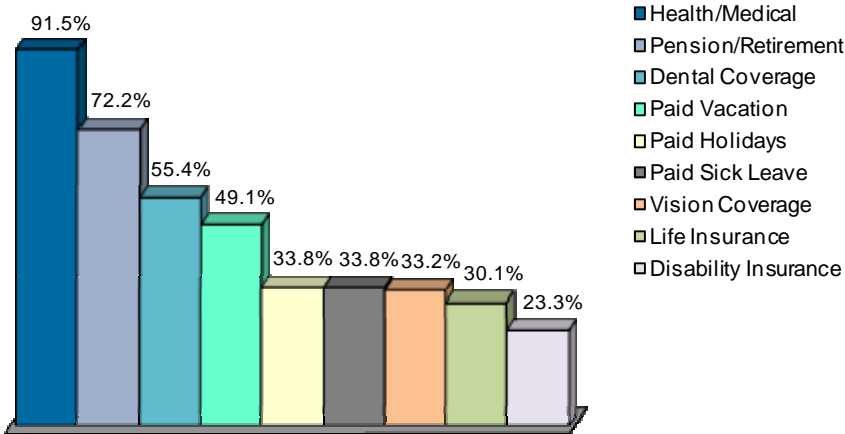
Commuting Statistics

The map at the left represents commuting patterns into Dubuque with the concentration per ZIP code represented in the legend.

Those who are willing to change/accept employment in the Dubuque Laborshed area are willing to commute an average of 25 miles one way for employment opportunities.



Benefits Currently Offered



The survey provides the respondents an opportunity to identify employment benefits they currently are offered. The chart at left provides the percentage of responses from those that are currently employed. The top nine benefits are shown.

The majority (85.4%) of respondents state they are currently sharing the cost of health/medical insurance premiums with their employer. However, 8.4 percent indicate their employer pays the entire cost of insurance premiums.

Education and Median Wage Characteristics by Industry

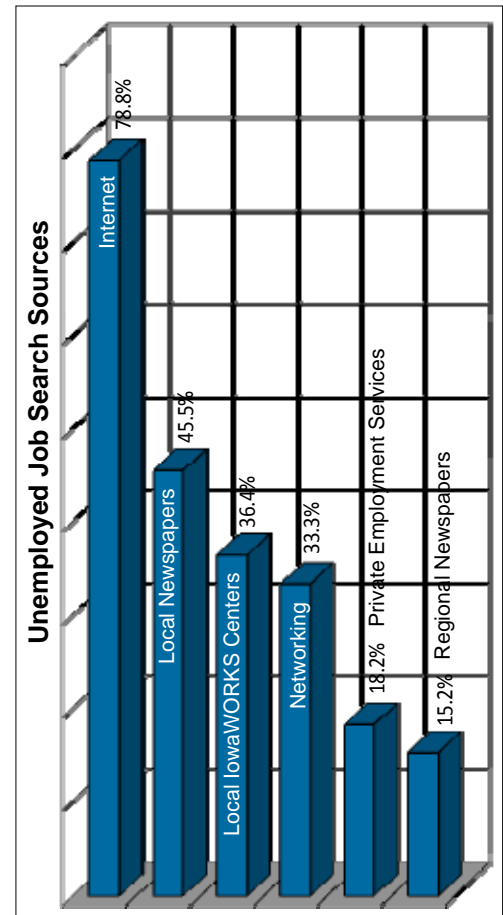
Industry	Education			Median Wages	
	Some Level Beyond High School	Associate Degree	Undergraduate Degree or Higher	Salary Wages (per year)	Non-Salary Wages (per hour)
Agriculture	44.4%	11.1%	11.1%	\$28,500	*
Construction	31.2%	6.3%	12.5%	\$55,000	\$22.50
Manufacturing	53.8%	6.6%	30.8%	\$77,500	\$17.53
Transportation, Communication & Utilities	76.9%	12.8%	25.7%	\$55,000	\$14.65
Wholesale & Retail Trade	59.4%	13.0%	20.3%	\$44,300	\$10.90
Finance, Insurance & Real Estate	83.3%	13.3%	40.0%	\$57,000	\$15.00
Healthcare & Social Services	82.2%	19.2%	37.0%	\$62,500	\$17.50
Personal Services	66.7%	22.2%	22.2%	\$54,000	\$10.00
Entertainment & Recreation	*	*	*	*	*
Professional Services	72.7%	9.1%	45.5%	\$70,000	\$13.50
Public Administration & Government	76.9%	15.4%	50.0%	\$54,000	\$20.02
Education	92.1%	6.8%	71.6%	\$50,000	\$12.00

This table includes all respondents without consideration of employment status or willingness to change/enter employment.

**Insufficient survey data/refused*

Unemployed - Those Willing to Enter/Re-enter Employment

- An estimated 2,271 unemployed individuals are willing to accept employment
- Average age is 44 years old
- 60.6% are female; 39.4% are male
- Education:
 - 66.7% have an education beyond high school
 - 6.1% have vocational training
 - 15.2% have an associate degree
 - 21.2% have an undergraduate degree
- Estimated wage range to attract the upper 66-75% qualified hourly wage applicants is \$10.00 to \$11.25/hr. with a median of the lowest wage of \$9.00
- Willing to commute an average of 25 miles one way for the right opportunity
- 78.8% expressed interest in seasonally and 72.7% in temporary employment opportunities
- 45.5% expressed interest in working varied shifts (2nd, 3rd & split)
- Would prefer to enter employment that offers the following benefits:
 - Health/medical insurance - 84.6%
 - Pension/retirement options - 30.8%
 - Paid vacation - 30.8%
 - Dental coverage - 23.1%
 - Paid holidays - 19.2%
 - Paid sick leave - 19.2%
 - Stock options - 7.7%
 - Disability insurance - 3.8%
 - Life insurance - 3.8%
 - Paid time off - 3.8%
 - Prescription drug coverage - 3.8%
 - Vision coverage - 3.8%
- 54.5% indicated they are seeking employment offers where the employer/employee share the cost of medical insurance premiums.



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