

Neshoba County, MS Workforce Analysis & Target Business Sectors

January 2018

Prepared in Collaboration with Kosciusko Attala Partnership, Leake County Development Association, Mississippi Band of Choctaw Indians and Winston County Economic Development District Partnership.





Neshoba County, MS

Workforce Analysis & Target Business Sector Identification

Introduction

The four-county Central Mississippi region that includes Winston, Attala, Neshoba and Leake counties, under a cooperative agreement with the Mississippi Band of Choctaw Indians, Tennessee Valley Authority (TVA) and the Central Electric Power Association, sought a workforce and economic development analysis. The analysis was envisioned to answer three key questions:

1. What is the current state and capacity of the workforce?
2. What additional or expanded workforce development strategies are needed?
3. What target business sectors are best suited to the regional workforce?

Younger Associates (YA) was selected to conduct the analysis based upon the company's past experience and successes in developing projects of this exact nature and the company's proposed approach to the analysis. The methodology for the Workforce Analysis included:

- » Labor Shed determination
- » Demographic profile of the Labor Shed
- » Analysis of the current employment base
- » Wage comparisons
- » Examination of concentrations by industry sectors and occupational clusters
- » Workforce Survey to determine a number of key and hidden workforce factors
- » Examination of the talent pipeline
- » Input from local employers and educators
- » Review of training and career pathways for high in-demand skills and occupations

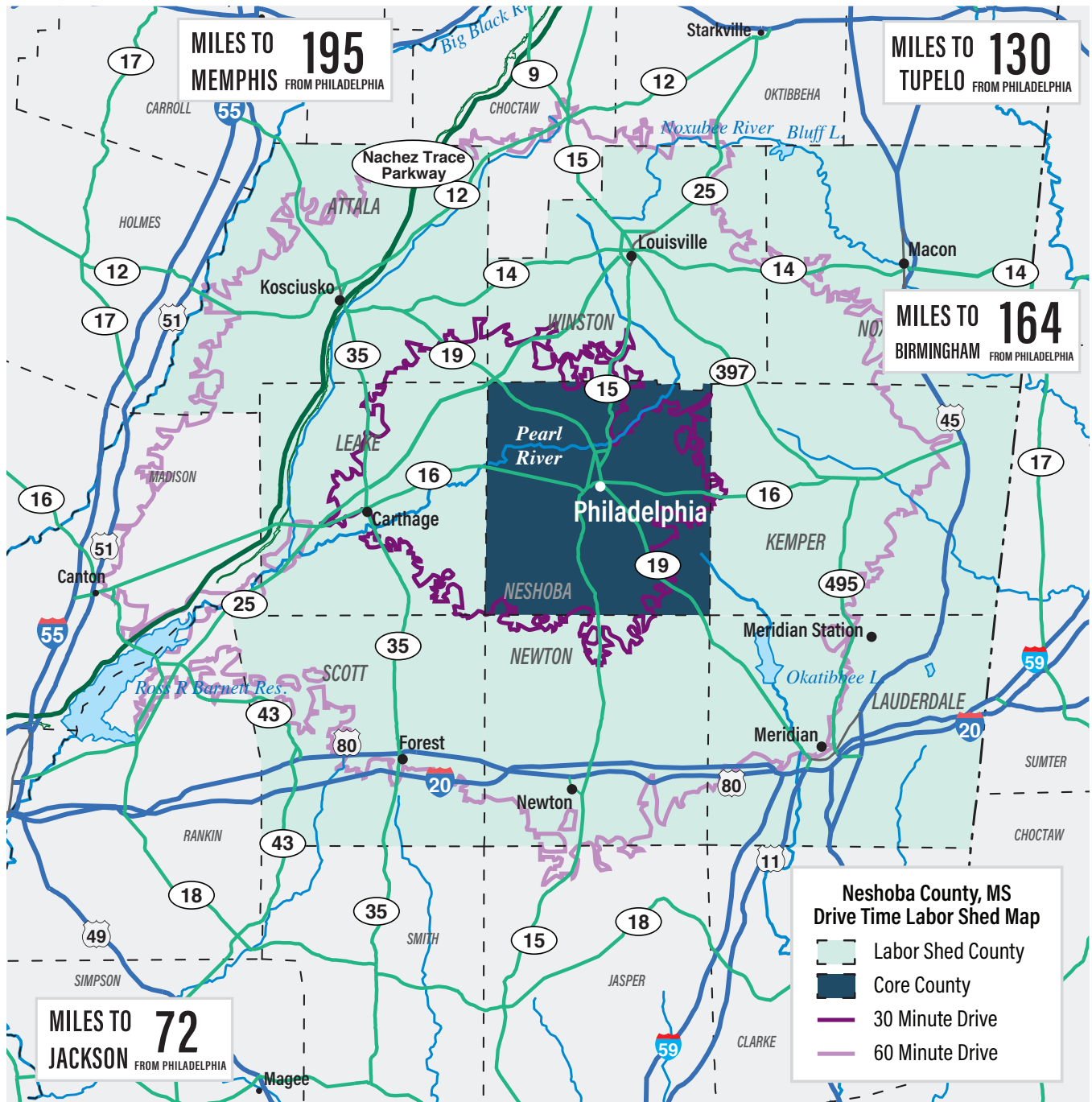
The methodology for the Target Business Sector Analysis (this is often called a Target Industry Analysis, but the YA approach looks at all applicable business sectors and opportunities) included:

- » Existing business, economic base review
- » Locational advantages review
- » Sites and buildings review
- » Business sector screening by NAICS code for several factors outlined later in this report
- » Input from employers, educators and other community leaders
- » Development and application of localized criteria to identify the targets

Labor Shed Determination

Based on existing commuting patterns, distances and travel times, the first step in the Workforce Analysis was the determination of the Neshoba County Labor Shed. The Neshoba County Labor Shed includes Attala, Kemper, Lauderdale, Leake, Newton, Neshoba, Scott and Winston counties. A 60-minute drive time from Philadelphia, located near the center of Neshoba County, covers portions of all of these counties plus a large portions of Madison County, which is not included in the Labor Shed to prevent overstatement in the labor pool.

Map 1. Neshoba County Labor Shed



Commute Patterns

Data from the U.S. Department of Commerce shows the following inflow and outflow of workers within the Neshoba County Labor Shed.

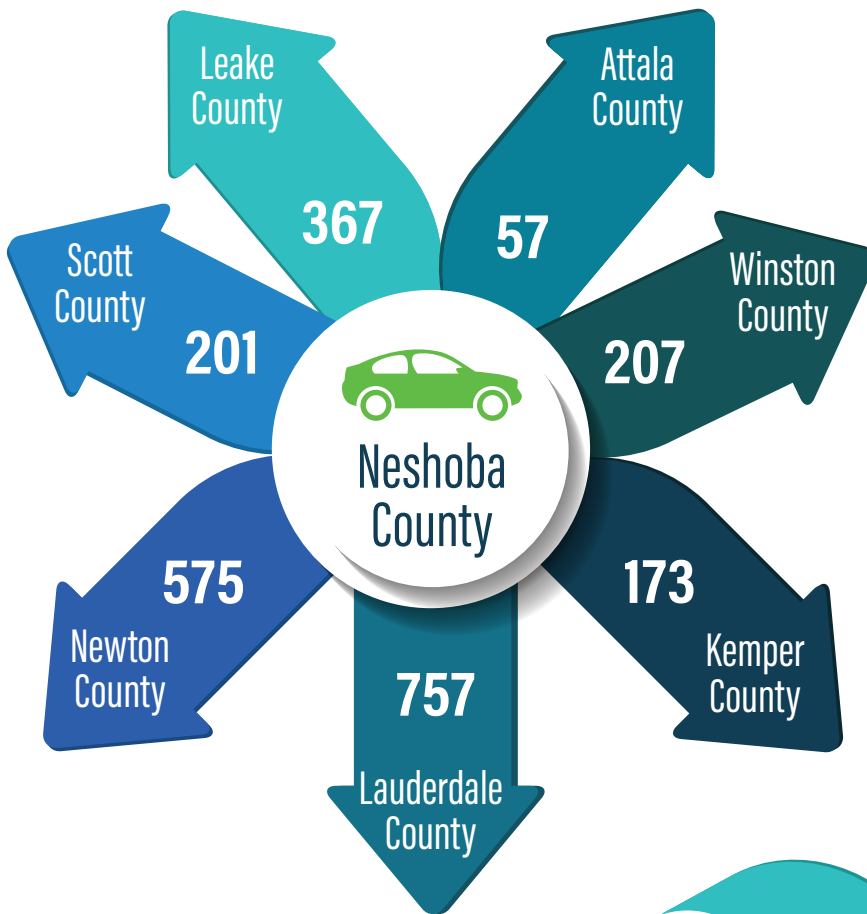
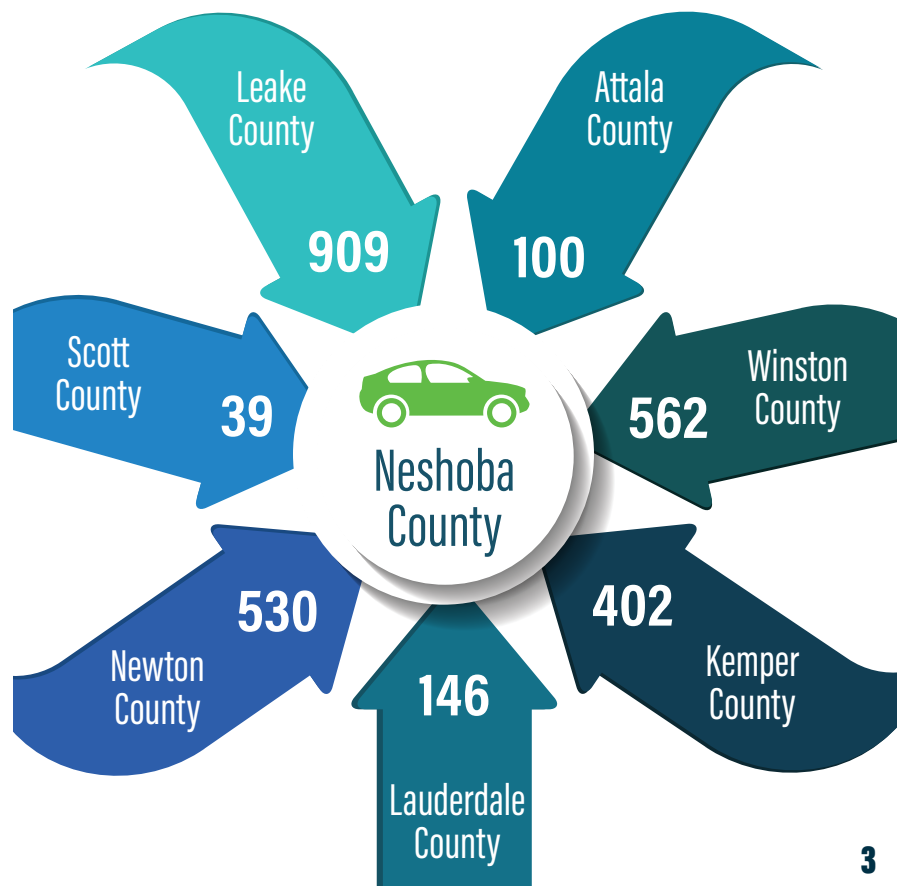


Chart 1. Out-Flow Commuting Patterns
People who live in Neshoba County and commute to another county for work.

Chart 2. In-Flow Commuting Patterns
People who live in another county and commute into Neshoba County for work.



Demographic Profile of the Labor Shed

Neshoba County's labor market area has an estimated 2017 population of 226,129. The Labor Shed population has declined, with a reduction in population of 2.93% since the 2010 census. Population projections to 2022 anticipate a continued decline in population for the Labor Shed of 1.41% unless there are changes in the economy.

Table 1. Summary Demographic Profile for Neshoba County

Labor Shed Counties include: Attala, Kemper, Lauderdale, Leake, Newton, Neshoba, Scott & Winston

	Neshoba County	Neshoba Labor Shed	Mississippi	United States
Population				
2000 Census	28,684	228,315	2,844,652	281,421,942
2010 Census	29,676	232,944	2,967,297	308,745,538
2017 Estimate	29,418	226,129	2,995,771	325,139,271
2022 Projection	29,414	222,938	3,018,507	337,393,057
Population Growth				
Percent Change: 2000 to 2010	3.46%	2.03%	4.31%	9.71%
Percent Change: 2010 to 2017	-0.87%	-2.93%	0.96%	5.31%
Percent Change: 2017 to 2022	-0.01%	-1.41%	0.76%	3.77%
Average Age	37.60	38.76	38.40	39.10
Education Attainment				
No High School Diploma	22.48%	20.16%	17.69%	13.43%
High School Graduate (or GED)	31.45%	32.76%	30.21%	27.83%
Some College, No Degree	22.73%	22.63%	22.96%	21.10%
Associate's Degree	9.57%	9.34%	8.51%	8.04%
Bachelor's Degree	9.07%	10.17%	12.91%	18.43%
Master's Degree	3.67%	3.55%	5.53%	7.91%
Post Graduate Degree	1.03%	1.38%	2.20%	3.25%
2017 Est. Average Household Income	\$ 55,444.00	\$ 53,964.94	\$ 58,480.00	\$ 80,853.00
Civilian Labor Force Participation Percentage	56.4%	55.0%	57.8%	63.5%

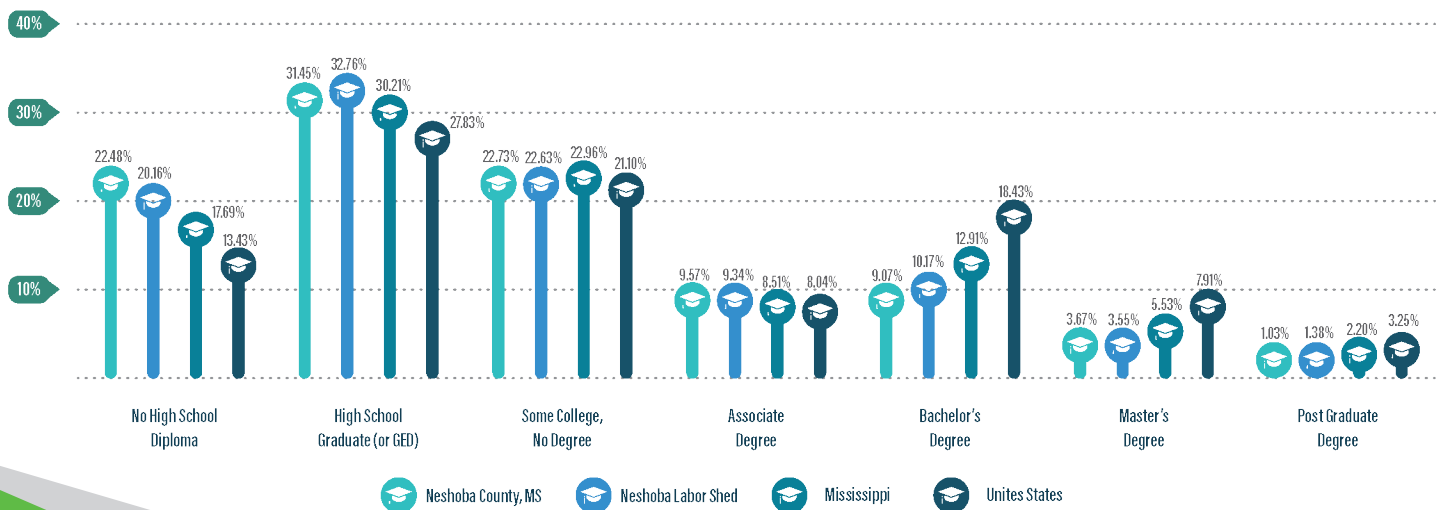
Appendix A of this report contains complete demographic profiles for:

- » Neshoba County
- » Neshoba County Labor Shed (all counties)
- » 30-Minute Commute Zone from Philadelphia, MS
- » 60-Minute Commute Zone from Philadelphia, MS
- » State of Mississippi
- » United States

These reports can provide much of the data regarding the local populations and comparisons to state and U.S. data that are used in site location decisions and grant writing.

Chart 3. Education Attainment for Neshoba County, Neshoba Labor Shed, State of Mississippi and the U.S.

Labor Shed Counties Include: Attala, Kemper, Lauderdale, Leake, Newton, Neshoba, Scott & Winston



Review of Existing Occupations

A review of existing occupations in the Labor Shed shows the number of occupations in which the region has concentrations of employment that are significantly higher than the national average (location quotient, LQ). Of those occupations, most are projected to experience national growth over the next five years. A full report of all occupations is provided in [Appendix B](#).

The abbreviated table, Table 2, below shows the occupations with 40 or more employees that have the highest local concentrations (LQ).

Table 2. Neshoba County, MS Labor Shed - Occupations with High Concentrations

Labor Shed Counties include: Attala, Kemper, Lauderdale, Leake, Newton, Neshoba, Scott & Winston

SOC	Description	2016 Jobs	2022 Jobs	2016 - 2022 Change	2016 - 2022 % Change	Avg. Hourly Earnings	2016 Location Quotient	National 2016 Jobs	National 2022 Jobs	2016 - 2022 National Change	National Avg. Hourly Earnings
51-3022	Meat, Poultry, and Fish Cutters and Trimmers	2,936	2,840	(96)	(3%)	\$10.73	31.56	153,998	158,555	2,611	\$12.27
51-3023	Slaughterers and Meat Packers	1,071	1,077	5	0%	\$11.90	21.79	81,388	84,675	2,056	\$13.00
35-2012	Cooks, Institution and Cafeteria	735	732	(3)	(0%)	\$9.46	2.80	435,035	463,271	58,237	\$12.67
31-1013	Psychiatric Aides	700	673	(27)	(4%)	\$8.92	16.28	71,118	75,524	7,190	\$13.82
33-3012	Correctional Officers and Jailers	659	629	(30)	(5%)	\$12.50	2.48	440,099	453,723	6,024	\$22.48
35-2011	Cooks, Fast Food	649	604	(45)	(7%)	\$8.56	2.03	528,589	515,067	28,516	\$9.85
51-9198	Helpers--Production Workers	600	590	(10)	(2%)	\$12.42	2.33	427,159	438,531	(22,520)	\$12.95
45-4022	Logging Equipment Operators	453	483	30	7%	\$16.59	17.55	42,715	41,936	(10,103)	\$17.34
47-4051	Highway Maintenance Workers	322	307	(14)	(4%)	\$13.75	3.63	146,657	151,849	3,720	\$18.99
29-2071	Medical Records and Health Information Technicians	294	284	(10)	(3%)	\$13.87	2.33	208,881	232,395	52,569	\$19.99
45-2093	Farmworkers, Farm, Ranch, and Aquacultural Animals	293	298	5	2%	\$12.69	5.21	93,106	97,369	12,244	\$12.84
47-2211	Sheet Metal Workers	239	231	(9)	(4%)	\$15.30	2.73	145,313	155,208	1,413	\$24.11
51-6031	Sewing Machine Operators	231	221	(9)	(4%)	\$13.15	2.47	154,842	141,123	(65,262)	\$12.53
49-3011	Aircraft Mechanics and Service Technicians	230	207	(24)	(10%)	\$29.06	2.87	132,978	139,277	13,463	\$29.34
51-3092	Food Batchmakers	211	206	(6)	(3%)	\$11.96	2.33	150,419	158,964	18,922	\$14.48
51-3099	Food Processing Workers, All Other	204	203	(1)	(0%)	\$9.09	7.63	44,243	47,798	5,698	\$12.41
49-9098	Helpers--Installation, Maintenance, and Repair Workers	203	202	(1)	(1%)	\$13.57	2.70	124,196	134,763	14,152	\$14.12
43-4031	Court, Municipal, and License Clerks	199	188	(10)	(5%)	\$14.19	2.49	132,331	136,922	3,332	\$19.08
49-9051	Electrical Power-Line Installers and Repairers	197	222	25	13%	\$25.87	2.72	119,737	134,788	28,545	\$32.17

Table 2. Neshoba County, MS Labor Shed - Occupations with High Concentrations (Continued)

SOC	Description	2016 Jobs	2022 Jobs	2016 - 2022 Change	2016 - 2022 % Change	Avg. Hourly Earnings	2016 Location Quotient	National 2016 Jobs	National 2022 Jobs	2016 - 2022 National Change	National Avg. Hourly Earnings
51-3021	Butchers and Meat Cutters	192	192	(0)	(0%)	\$11.30	2.33	136,603	145,293	19,713	\$15.27
43-5031	Police, Fire, and Ambulance Dispatchers	173	157	(16)	(9%)	\$11.78	2.88	99,527	100,025	(1,312)	\$19.74
45-2041	Graders and Sorters, Agricultural Products	172	164	(8)	(4%)	\$11.29	4.78	59,541	60,882	4,447	\$11.68
51-7041	Sawing Machine Setters, Operators, and Tenders, Wood	171	175	4	2%	\$12.87	5.32	53,209	54,972	(12,255)	\$14.31
51-7011	Cabinetmakers and Bench Carpenters	166	110	(55)	(33%)	\$12.04	2.52	108,759	111,169	(34,968)	\$16.73
53-7063	Machine Feeders and Offbearers	162	159	(3)	(2%)	\$14.01	3.00	89,704	91,931	(5,376)	\$14.66
45-4021	Fallers	137	130	(7)	(5%)	\$20.19	27.71	8,180	7,700	(2,627)	\$19.09
45-1011	First-Line Supervisors of Farming, Fishing, and Forestry Workers	135	146	11	8%	\$18.08	4.32	51,757	51,880	1,088	\$22.85
51-7042	Woodworking Machine Setters, Operators, and Tenders, Except Sawing	125	120	(4)	(4%)	\$13.40	2.72	75,981	78,430	(22,380)	\$14.35
51-9193	Cooling and Freezing Equipment Operators and Tenders	120	120	0	0%	\$11.58	23.60	8,437	8,861	795	\$15.49
11-1031	Legislators	113	103	(10)	(9%)	\$11.74	3.39	55,395	55,529	(1,883)	\$21.55
51-4033	Grinding, Lapping, Polishing, and Buffing Machine Tool Setters, Operators, and Tenders, Metal and Plastic	111	102	(9)	(8%)	\$18.89	2.47	74,482	68,950	(20,966)	\$16.83
51-3093	Food Cooking Machine Operators and Tenders	110	110	(1)	(0%)	\$10.92	4.94	36,965	39,090	4,630	\$14.58
25-2032	Career/Technical Education Teachers, Secondary School	110	110	0	0%	\$22.28	2.37	76,557	77,513	(1,869)	\$28.59
49-9044	Millwrights	106	106	0	0%	\$20.99	4.27	41,102	46,007	5,099	\$25.94
51-2041	Structural Metal Fabricators and Fitters	102	101	(0)	(0%)	\$16.71	2.18	77,412	81,691	(3,734)	\$19.23
29-2053	Psychiatric Technicians	92	98	6	6%	\$11.60	2.36	64,852	69,097	7,516	\$17.32
43-5041	Meter Readers, Utilities	71	64	(6)	(9%)	\$12.84	3.44	33,991	32,115	(3,552)	\$20.14
49-3041	Farm Equipment Mechanics and Service Technicians	69	78	9	14%	\$18.65	3.00	37,957	40,968	4,545	\$18.67
47-2071	Paving, Surfacing, and Tamping Equipment Operators	68	69	2	3%	\$17.89	2.16	51,838	55,516	(1,107)	\$21.06
51-4071	Foundry Mold and Coremakers	65	55	(9)	(14%)	\$12.79	8.64	12,376	11,029	(5,749)	\$17.32
43-4141	New Accounts Clerks	64	56	(8)	(13%)	\$14.66	2.53	41,860	40,318	(6,643)	\$17.54
39-4031	Morticians, Undertakers, and Funeral Directors	60	58	(2)	(4%)	\$16.85	3.64	27,348	28,627	859	\$26.07
37-3019	Grounds Maintenance Workers, All Other	58	58	0	0%	\$13.91	5.00	19,278	20,396	2,792	\$15.33
51-8021	Stationary Engineers and Boiler Operators	54	51	(3)	(6%)	\$22.34	2.56	35,233	36,610	1,533	\$29.52



Table 2. Neshoba County, MS Labor Shed - Occupations with High Concentrations (Continued)

SOC	Description	2016 Jobs	2022 Jobs	2016 - 2022 Change	2016 - 2022 % Change	Avg. Hourly Earnings	2016 Location Quotient	National 2016 Jobs	National 2022 Jobs	2016 - 2022 National Change	National Avg. Hourly Earnings
43-4041	Credit Authorizers, Checkers, and Clerks	52	50	(2)	(4%)	\$14.17	2.26	38,293	38,374	(3,445)	\$18.91
39-2011	Animal Trainers	50	53	3	6%	\$13.56	2.41	34,016	35,462	1,182	\$14.39
45-4011	Forest and Conservation Workers	49	69	21	43%	\$15.16	6.49	12,388	13,420	1,350	\$15.01
19-1031	Conservation Scientists	46	47	1	3%	\$23.32	3.44	21,927	23,201	1,859	\$31.29
45-2011	Agricultural Inspectors	45	43	(2)	(4%)	\$20.73	4.23	17,456	17,799	1,275	\$21.28
41-2012	Gaming Change Persons and Booth Cashiers	44	41	(3)	(6%)	\$9.56	3.03	23,827	24,162	(468)	\$12.47
49-2095	Electrical and Electronics Repairers, Powerhouse, Substation, and Relay	41	46	5	11%	\$34.75	2.96	23,080	23,684	449	\$35.84

Wages

Average wages for all occupations in the Neshoba County Labor Shed are \$16.81 per hour. This is \$6.38 per hour, or 38% below the national average of \$23.19. Almost every occupation within a high local concentration has wages well below the national average except occupations related to forestry and wood products. It is typical for occupations with high local concentrations to have higher wages since concentration typically represents specialization within the workforce.

Since some of the occupations with high LQs in the local Labor Shed are projected to see local and national decline over the next five years, there are opportunities to transition the workers in these occupations to other industries. This is reflected in the target industry recommendations.

In total, existing businesses in the Labor Shed are projected to generate an increase of over 992 jobs over the next five years. This projected increase in employment, paired with prevailing low wages and no growth in the local population base indicates that there will be market pressure to increase local wages.

Talent Pipeline

A review of higher education institutions and program completions in the region serving the Central Mississippi Labor Shed reveals a substantial pipeline of future talent for any locating or expanding industry.

For this analysis, we included all colleges and technical schools within 95-100 miles of the center point of the four-county region in this study. However, we excluded the colleges within this radius located in Alabama to keep from overstating the size of the talent pipeline. While these higher education institutions could likely supply some of the talent for Central Mississippi, they are more focused on serving their local area.

Map 2. Higher Education Institutions Serving the Central Mississippi Labor Shed

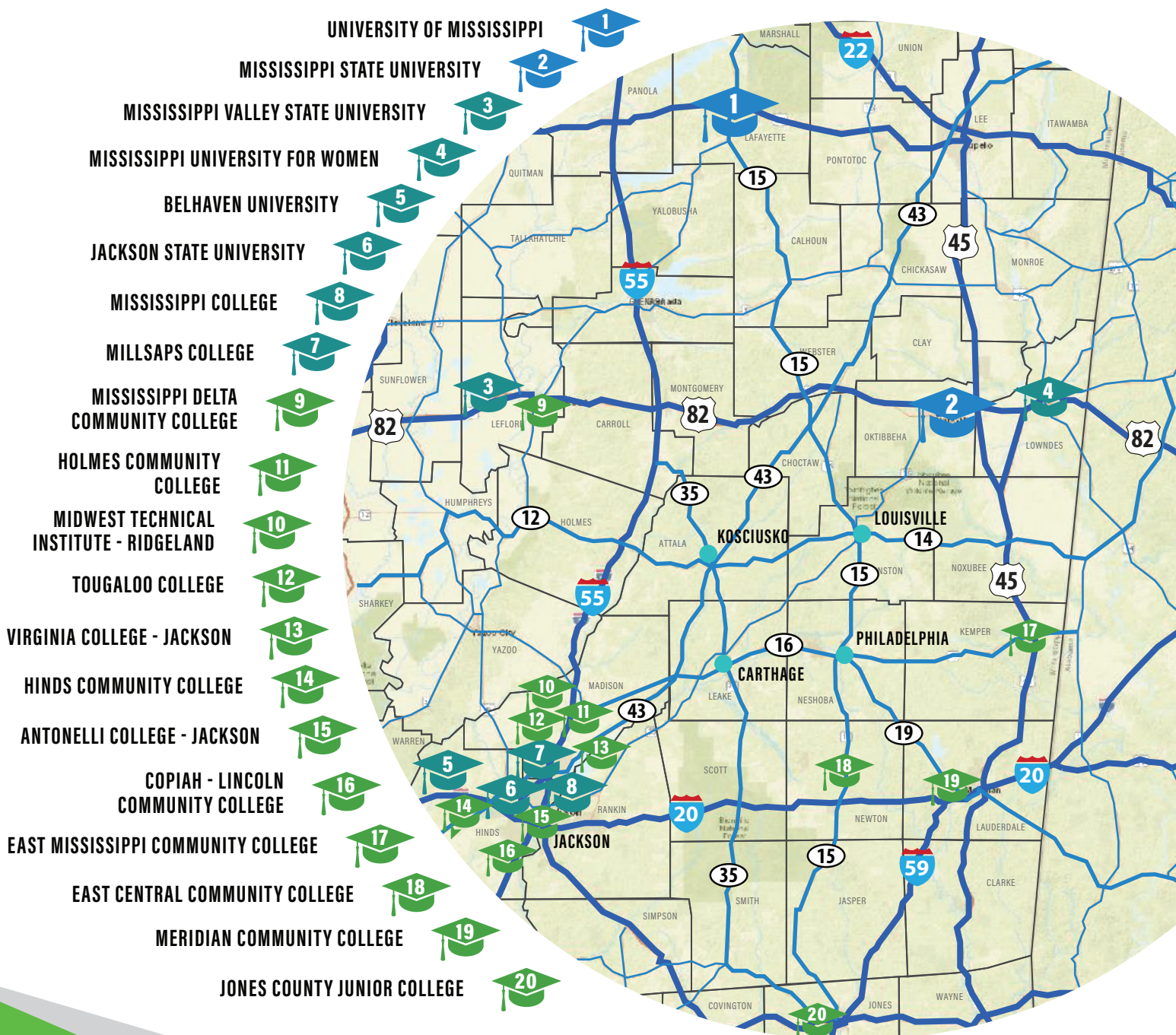




Table 3. Higher Education Completions

A total of 20 institutions offer programs of general and technical education ranging from technical certificates to doctoral degrees, providing a steady supply of talent.

Institution	Award of less than 1 academic year	Award of at least 1 but less than 2 academic years	Associate Degree	Award of at least 2 years, but less than 4	Bachelor's Degree	Post-Baccalaureate Certificate	Master's Degree	Post-Master's Certificate	Doctorate Degree	All Certificates	All Degrees	All Completions
Antonelli College - Jackson	0	32	115	0	0	0	0	0	0	32	115	147
Belhaven University	3	0	38	0	514	1	358	22	0	26	910	936
Copiah-Lincoln Community College	65	65	597	0	0	0	0	0	0	130	597	727
East Central Community College	0	116	483	0	0	0	0	0	0	116	483	599
East Mississippi Community College	49	124	772	0	0	0	0	0	0	173	772	945
Hinds Community College	675	1459	1545	0	0	0	0	0	0	2,134	1,545	3,679
Holmes Community College	0	232	1061	0	0	0	0	0	0	232	1,061	1,293
Jackson State University	0	0	0	0	984	0	434	13	86	13	1,504	1,517
Jones County Junior College	80	382	873	0	0	0	0	0	0	462	873	1,335
Meridian Community College	90	186	527	5	0	0	0	0	0	281	527	808
Midwest Technical Institute - Ridgeland	361	21	0	0	0	0	0	0	0	382	0	382
Millsaps College	0	0	0	0	179	0	41	0	0	0	220	220
Mississippi College	0	0	0	0	579	0	585	4	196	4	1,360	1,364
Mississippi Delta Community College	0	131	397	0	0	0	0	0	0	131	397	528
Mississippi State University	0	0	0	0	3,302	0	716	17	236	17	4,254	4,271
Mississippi University for Women	0	0	41	0	739	0	83	1	1	1	864	865
Mississippi Valley State University	0	0	0	0	305	0	108	0	0	0	413	413
Tougaloo College	0	0	0	0	141	0	0	0	0	0	141	141
University of Mississippi	0	0	0	0	3826	5	957	16	548	21	5,331	5,352
Virginia College - Jackson	17	167	17	0	0	0	0	0	0	184	17	201
	1,340	2,915	6,466	5	10,569	6	3,282	73	1,067	4,339	21,384	25,723

Appendix C contains detailed completions by program, degree/certificate and institution.

These 20 higher education institutions produce over 25,700 program completions per year.



Workforce Survey

In addition to analyzing published secondary data from the U.S. Bureau of Labor Statistics, U.S. Department of Commerce, U.S. Department of Education, the Mississippi Departments of Labor and Workforce Development and proprietary data sources, Younger Associates conducted a workforce survey to collect information not found in any published secondary data. This includes underemployment and the not-employed-but-interested cohort, most of whom are not included in unemployment statistics.

The YA survey team was in the region September 14-16, 2017, and conducted 592 intercept interviews of a demographically representative sample of the population. This number of surveys provides a ± 4 percent margin of error.

The interview team included both English and Spanish speaking researchers. The surveys were administered as brief verbal interviews so that there were no literacy or language barriers. The survey team worked during a range of different days, times and places to deliver results that are reflective of the Labor Shed population.

Table 4. List Survey Locations

Locations for the survey interviews were identified by local economic developers and included:

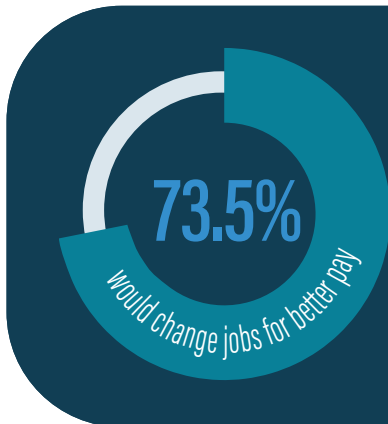
Kosciusko - Attala County	Carthage - Leake County	Philadelphia - Neshoba County
Kangaroo Crossing	Dirt Cheap	Piggly Wiggly
Sunflower	The Junction	Choctaw Post Office
WalMart Supercenter	WalMart Supercenter	WalMart Supercenter
	Piggly Wiggly	Vowell's Market Place
		Pearl River Resort
Louisville - Winston County	Walnut Grove:	Bogue Chitto Community
Northgate Shopping Center	Dollar General	Big Creek Store
WalMart Supercenter	South of the River Roux	
Winston County Courthouse		
R.E. Heinze Stadium at Louisville High School		

Key Workforce Findings

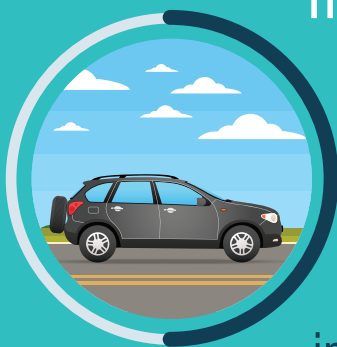
Currently Employed

Only **9.2%** of the currently employed population is **self-employed**, which is **slightly lower** than the other rural areas where self-employment is typically between **12% and 15%**.

12-15%
9.2%



Among the **currently employed**, 73.5% report a **willingness to change jobs**, which is **higher** than the rates we have seen in other labor shed areas. Most respondents who are willing to change jobs want **higher pay** (as little as 50¢).



The average commute time in the labor shed is **26.5 minutes** versus the **26 minutes** in Neshoba County.

Almost **17%** of the currently employed have a **second job** with the most frequently cited second job being **farming, retail or services**.



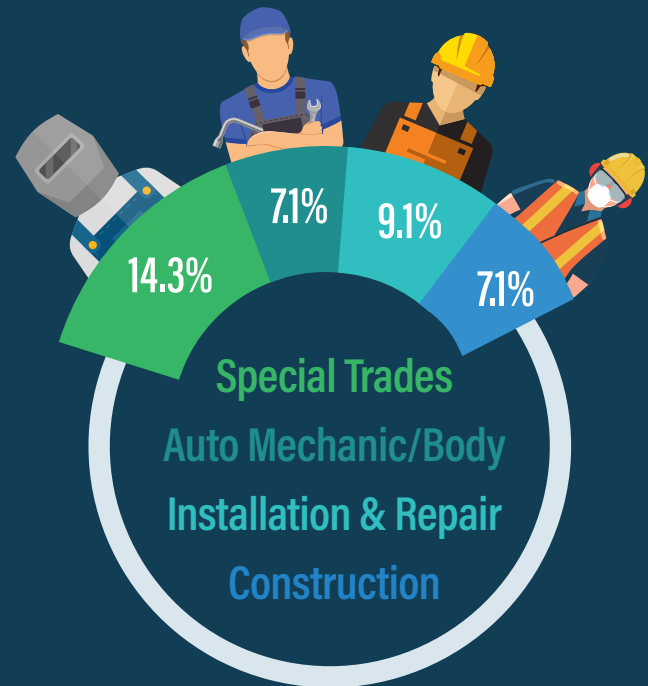
Underemployed

Approximately **28%** of the workforce report being **underemployed**.

The rates we have measured across the country are typically more in the **14-18%** range.



Survey respondents who identified as underemployed listed specialized work experience or training for:



The underemployed are a significant resource for potential employees in the Central Mississippi Labor Shed. This includes people who:

- » Are employed part-time, but would prefer to be employed full-time
- » Are employed, but have experience, skills or training that qualify them for work in other fields
- » Are employed in second, and/or part-time jobs

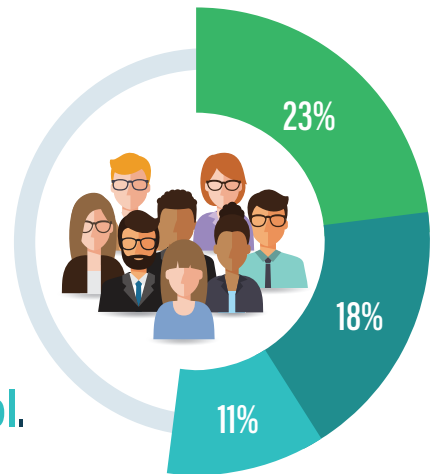
15% FEWER THAN
HELD A CERTIFICATE OR WERE
IN THE PROGRAM AT PRESENT



Among all survey respondents, **88%** were **aware** of the Work Keys/Career Readiness Certificate Program, a very high level, but fewer than **15%** either **held a certificate or were in the program** at present.

Not Employed, But Interested

A significant cohort representing more than 10,000 people in the Labor Shed are **not employed, but seeking jobs**. Of those, **23%** said they had **applied for jobs, but not been hired**; **18%** cited **layoffs or company closures**; and **11%** said they were **attending school**.



Unemployed cohort would be willing to work:

- 88.5%** Willing to **Train** for New Skills
- Hourly Rate of **\$10.29**
- 70%** Willing to Work **Shifts**

Top preferences among Not Employed for new skills training

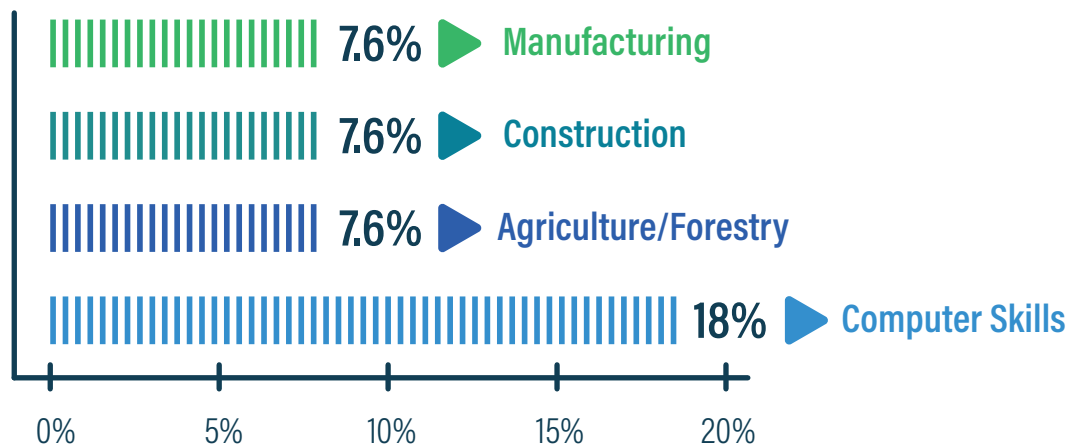




Table 5. Hidden Labor Reserves for Neshoba County, MS

Labor Shed Counties Include: Attala, Kemper, Lauderdale, Leake, Newton, Neshoba, Scott & Winston

Employment Characteristic	Neshoba County Labor Shed
Working Age Population 18-64	132,324
Adjustment - Institutionalized (3.3%)	127,953
Not Employed, But Interested in Employment from Survey	17.9%
Reported No Boundaries to Employment	48.0%
Total Not Currently Employed, but Interested in Employment	10,994
Employed Part Time Percentage from Survey	16.3%
Total Employed Part Time	13,494
Part-Employment, but Prefer Full-time Employment Percentage from Survey	68.7%
Part-Employment, but Prefer Full-time Employment	9,270
Employed, but Reported Underemployed Percentage from Survey	27.9%
Total Under-Employed	23,097
Want to Work in Their Area of Training/Skills/Education Percentage from Survey	74.3%
Total Under-Employed and Want to Use Training/Skills/Education	17,161
Annual Completions from All Training Providers in the Region (Technical, Associates & Beyond Degrees)	25,723
Hidden Labor Reserves	63,148

Full survey response data for Central Mississippi are included in Appendix D.

Target Sector Screening

The determination of potential target business sectors for a community by Younger Associates is based upon numerous factors, including:

- » A review of existing employment and business establishments within the Labor Shed
- » A review of industry concentrations within the Labor Shed
- » A non-technical review of available sites and buildings
- » A screening of location quotients (LQ) by business sector
- » Interviews with major employers located in Central Mississippi
- » Interviews with higher education leaders
- » A review of any other pertinent locational strengths
- » An analysis of potential targets to determine growth potential and compatibility with local resources

Existing Economic Base

Major private employers in Neshoba County are led by recreation, leisure and health care.

Table 6. Neshoba County Major Employers

Company	Employees	Product or Services
Choctaw Band of Mississippi Indians	2681	Tribal Government
W.G. Yates & Sons Construction	2588	Construction
Silver Star	1,371	Resort & Casino
Division of Schools	731	Education
Choctaw Resort Development Enterprise	434	General Contractors
Choctaw Health Center	361	Health Care
Bok Homa	233	Casino
Tyson Foods	100-249	Food Processing
Golden Moon	193	Resort & Casino
Choctaw Residential Center	120	Senior Home
Neshoba County Schools	99	Education
Neshoba General Hospital	50-99	Health Care
Philadelphia Public Schools	50-99	Education
Dancing Rabbit Golf Course	70	Golf Course
Chahta Enterprise	61	Commercial Laundry, Metal Fab
Choctaw-Ikhana, Inc.	35	Lab for Calibrating equip, Security
IKBI, Inc.	30	Construction
Dancing Rabbit Inn	25	Hotel/Motel

A numeric screening of all business sectors identified the sectors that have at least twice the concentration of business activity as the national economy (an LQ of 2 or above). **Appendix E** contains a full list of all occupations. Table 7 on the next page lists these sectors with \$42,500 or higher average earnings per job. This wage benchmark was selected to focus on business sectors that have the potential to improve wage rates in the Central Mississippi region.

Further study of the industrial mix in the Labor Shed; however, reveals that nine of the 33 industries within a high concentration are in sectors that are projected to undergo a national decline in job numbers over the next five years. Some decline is due to modernization and automation of existing facilities. This does not necessarily dictate that there will be a decline in these industries locally, but the overall industry outlook is worthy of note.

Any of the sectors listed in Table 7 with a positive national growth rate projection could be considered a target for the Central Mississippi region that matches workforce resources.

Table 7. Neshoba County, MS Labor Market Area Target Industry Sectors with Growth & Wage Potential

Labor Shed Counties Include: Attala, Kemper, Lauderdale, Leake, Newton, Neshoba, Scott & Winston

NAICS	Description	2016 Business Units	2016 Jobs	2022 Jobs	2016-2022 Change	LQ of 3+	Wages \$50K+	National 2016 Jobs	National 2022 Jobs	2016 - 2022 National Change	2016 - 2022 National % Change	
												Increase of 50+ Jobs
331513	Steel Foundries (except Investment)		2	418	387	(31)	49.48	\$56,475	13,977	12,371	(1,606)	(11%)
333924	Industrial Truck, Tractor, Trailer, and Stacker Machinery Manufacturing		2	551	484	(67)	36.50	\$66,542	24,963	27,943	2,979	12%
324122	Asphalt Shingle and Coating Materials Manufacturing		2	222	202	(19)	33.90	\$121,609	10,823	10,871	49	0%
611512	Flight Training		3	320	235	(86)	30.10	\$97,495	17,622	19,241	1,620	9%
321912	Cut Stock, Resawing Lumber, and Planing		4	209	248	40	24.89	\$45,202	13,878	15,045	1,167	8%
315190	Other Apparel Knitting Mills		1	61	30	(31)	20.68	\$45,273	4,870	3,871	(999)	(21%)
113310	Logging		73	788	842	54	16.92	\$44,065	77,070	73,843	(3,228)	(4%)
337121	Upholstered Household Furniture Manufacturing		1	568	363	(205)	14.83	\$43,743	63,397	62,857	(541)	(1%)
322230	Stationery Product Manufacturing		3	141	145	5	12.69	\$45,159	18,342	15,183	(3,159)	(17%)
327993	Mineral Wool Manufacturing		2	128	143	15	12.52	\$61,554	16,923	17,213	290	2%
321113	Sawmills		11	455	422	(33)	8.81	\$50,068	85,606	86,873	1,268	1%
311119	Other Animal Food Manufacturing		4	174	150	(25)	8.50	\$55,311	33,955	35,298	1,342	4%
334511	Search, Detection, Navigation, Guidance, Aeronautical, and Nautical System and Instrument Manufacturing		1	614	614	0	8.45	\$86,434	120,315	106,450	(13,865)	(12%)
321114	Wood Preservation		2	50	52	2	8.35	\$55,051	9,887	10,917	1,030	10%
115210	Support Activities for Animal Production		5	189	216	28	7.58	\$42,979	41,185	43,595	2,410	6%
332312	Fabricated Structural Metal Manufacturing		7	398	386	(12)	7.41	\$60,124	89,025	93,284	4,259	5%
113110	Timber Tract Operations		5	15	13	(2)	6.53	\$54,299	3,862	4,257	395	10%
236210	Industrial Building Construction		7	647	916	269	6.23	\$97,423	171,883	184,793	12,910	8%
424710	Petroleum Bulk Stations and Terminals		9	121	132	11	6.00	\$60,696	33,342	36,149	2,807	8%
336370	Motor Vehicle Metal Stamping		1	299	346	47	5.74	\$67,929	86,054	88,506	2,452	3%
221122	Electric Power Distribution		9	609	696	87	4.81	\$132,884	209,625	220,010	10,386	5%
333995	Fluid Power Cylinder and Actuator Manufacturing		1	43	51	8	4.31	\$52,653	16,363	17,380	1,017	6%
488210	Support Activities for Rail Transportation		3	86	105	19	4.19	\$54,874	33,843	38,660	4,817	14%
522291	Consumer Lending		66	257	281	25	3.99	\$43,795	106,407	117,737	11,331	11%
453930	Manufactured (Mobile) Home Dealers		8	32	14	(18)	3.84	\$51,539	13,610	12,353	(1,257)	(9%)
333996	Fluid Power Pump and Motor Manufacturing		1	40	36	(4)	3.56	\$126,624	18,504	18,953	449	2%
454310	Fuel Dealers		22	132	115	(17)	2.83	\$49,189	77,503	71,475	(6,028)	(8%)
444210	Outdoor Power Equipment Stores		8	57	73	16	2.79	\$43,672	34,000	35,986	1,986	6%
332313	Plate Work Manufacturing		4	74	75	1	2.75	\$44,049	44,426	46,175	1,750	4%
336413	Other Aircraft Parts and Auxiliary Equipment Manufacturing		2	177	172	(6)	2.72	\$73,001	108,101	115,129	7,027	7%
423820	Farm and Garden Machinery and Equipment Merchant Wholesalers		16	164	193	29	2.66	\$48,396	102,258	108,423	6,164	6%
541340	Drafting Services		6	27	27	(0)	2.63	\$52,077	17,277	16,997	(280)	(2%)
423110	Automobile and Other Motor Vehicle Merchant Wholesalers		6	185	214	30	2.56	\$51,888	119,128	124,351	5,223	4%

Recommended Target Sectors

Primary Targeted Sectors

Correlating the existence of local skills and experience base due to the presence of existing industries with the growing sectors of the U.S. economy yields a list of potential industrial recruitment targets. The target list has been refined to only include industries that offer an average pay of more than \$42,500.

A review of all the data compiled for this analysis leads to the following recommendation for other primary targeted industrial recruitment sectors:

321 – Wood Product Manufacturing. The industry has been historically strong in the region, and the infrastructure is in place to support it. Again, Mississippi State University offers a strong talent pipeline. Specific sectors recommended for recruitment include:

321113 – Sawmills. Average annual salary \$50,000. Projected national growth rate through 2022, 1 percent.

321114 – Wood Preservation. Average annual salary \$55,000. Projected national growth rate through 2022, 10 percent.

321912 – Cut Stock, Sawing Lumber and Planing. Average annual salary \$45,200. Projected national growth rate through 2022, 8 percent.

321999 – All Other Miscellaneous Wood Product Manufacturing.*

332 – Fabricated Metal Product Manufacturing. A major presence in the region, the skill sets are present in the workforce and training infrastructure exists from the technical certificate to graduate level. Several growth sectors exist nationally. Specific sectors recommended for recruitment include:

332312 – Fabricated Structural Metal Manufacturing. Annual salary \$60,100; anticipated average growth rate, 5 percent.

332313 – Plate Work Manufacturing. Annual salary \$40,000; anticipated average growth rate, 4 percent.

332311 – Prefabricated Metal Building and Component Manufacturing.*

332992 – Small Arms Manufacturing.*

333 – Machinery Manufacturing. The presence of Mississippi State University and its excellent engineering program offers a steady source of skilled graduates, and the established manufacturing industry in the area has already proven the ability for success in the region. Specific sectors recommended for recruitment include:

333924 – Industrial Truck, Tractor, Trailer and Stacker Machinery Manufacturing. Average annual salary \$66,500. Anticipated national job growth through 2022, 12 percent.

333995 – Fluid Power Cylinder and Actuator Manufacturing. Average annual salary \$42,700. Projected national growth rate through 2022, 6 percent.

* While not included in the industry table for the Labor Shed, this subsector is present in the Central Mississippi region and should be investigated as a potential target.

Recommended Target Sectors

Primary Targeted Sectors (Cont.)

333996 – Fluid Power Pump and Motor Manufacturing. Average annual salary \$126,600. Projected national growth rate through 2022, 2 percent

333111 – Farm Equipment and Machinery Manufacturing.*

333120 – Construction Machinery Manufacturing.*

333241 – Food Product Machinery Manufacturing.*

333413 – Industrial and Commercial Fan and Blower and Air Purification Equipment Manufacturing.*

333519 – Rolling Mill and Other Metalworking Machinery Manufacturing.*

336 - Transportation Equipment Manufacturing. Given the presence in the larger region of four major automotive and heavy truck assembly plants, automotive assembly is essentially a mature industry in the region with little room for growth. However, assembly expansion in the southeast in general could spur an increased demand for second- and third-tier suppliers, and could cause those suppliers to review their existing manufacturing and distribution networks with an eye toward consolidation and/or relocation and modernization for optimum efficiency.

336370 - Motor Vehicle Metal Stamping. Average annual salary \$68,000. Anticipated national job growth through 2022, 3 percent.

336413 - Other Aircraft Parts and Auxillary Equipment Manufacturing. Average annual salary \$73,000. Anticipated national job growth through 2022, 7 percent.

336211 - Motor Vehicle Body Manufacturing.*

336360 - Motor Vehicle Seating and Interior Trim Manufacturing.*

Other Recommended Primary Targeted Sectors

236210 – Industrial Building Construction. Annual salary \$97,900. Projected average growth rate, 8 percent.

A review at the post-high-school educational completions table referenced earlier in this report affirms that there is a pipeline for trained talent with the appropriate skill sets for these manufacturing sectors and for general business support such as business management and computer training. In particular, the number of engineering graduates from Mississippi State University is an attractive selling point for industries that may be concerned about their ability to hire the needed engineers.

* While not included in the industry table for the Labor Shed, this subsector is present in the Central Mississippi region and should be investigated as a potential target.

Secondary Targeted Sectors

Other sectors within each three-digit code would also be good fits for the region, as the workforce skill set, training infrastructure and supply/customer chain could be easily adaptable.

The presence of a strong agricultural education program at Mississippi State University and an existing labor force skilled in food processing indicates that other targets in the food processing sector should be investigated, as those sectors tend to be somewhat more immune to economic fluctuations than other manufacturing sectors. In particular, the following sectors should be considered secondary targets:

311 - Food Manufacturing.

31119 – Other Animal Food Manufacturing. Average annual salary \$55,300. Projected national job growth through 2022, 4 percent.

3114 – Fruit and Vegetable Preserving and Specialty Food Product Manufacturing.*

3115 – Dairy Product Manufacturing.*

Further study of the industrial mix in the Labor Shed; however, reveals that two local industry concentrations in the textile industry and the wood products industry are in sectors that are projected to undergo a national decline in job numbers over the upcoming five years due to modernization and automation of existing facilities, closing of outdated facilities, offshoring of production activities, and decreased demand for products.

It should be noted, however, that recent announcements involving foreign direct investment in the textile and wood products industry in the South Central and Southeastern U.S. may alter the trend in the those industries. Increasing automation in the textile industry as well as more dependable and less expensive electrical power are the driving forces in the onshoring of this new wave of textile manufacturing; it is too early to predict how large a trend that will become. We will, therefore, include textile and garment manufacturing and wood products manufacturing, particularly fluff pulp and fuel pellets as secondary potential industrial targets for the region. Specific three-digit codes include:

313,314,315 - Textile Mills, Textile Product Mills, Apparel Manufacturing.

315190 – Other Apparel Knitting Mills. Average annual salary \$45,300.

313210 – Broadwoven Fabric Mills.*

313230 – Nonwoven Fabric Mills.* (a national growth industry that could be considered a primary target)

The following is a closely related sector, but not currently in the region.

313111 – Yarn Spinning Mills. (particularly direct foreign investment)

* While not included in the industry table for the Labor Shed, this subsector is present in the Central Mississippi region and should be investigated as a potential target.

Secondary Targeted Sectors (Cont.)

An additional, and important, secondary target sector for Neshoba County is tourism. While wages for the tourism industry as a whole are far lower than average, tourism can generate other benefits.

In the Central Mississippi region, there are still a number of workers with low educational attainment. Jobs in the hospitality/tourism industry provide employment opportunities for these workers. The tourism industry can also provide "gateway" jobs for young people seeking a first job and job experience.

Tourism can also increase the local tax base. Additional tax revenues can then be used for other types of economic development initiatives.

With the Pearl River Resort, Golden Moon and Silver Star Casinos, the Dancing Rabbit Golf Club and related recreational opportunities, expanding tourism leverages these key assets. The county and region should vigorously seek to attract festivals, events, conferences and meetings. Visitors to an area sometimes become residents, which could assist in generating population growth for the area.

Recommendations for Innovation

Attract & Train Truck Driver Candidates

Many of the employers interviewed for this study expressed a shortage of truck drivers in the region. This shortage is due, in part, by the number of drivers reaching retirement age or retiring early because of the Department of Transportation's mandate of digital records. Furthermore, fewer people are entering this occupation due to negative perceptions about the industry and general lack of knowledge about the demand for drivers, pay and benefits. Most of the job openings in Central Mississippi are not for long haul drivers, meaning that the drivers can work during the day and be home at night.

Employers and potential truck drivers report that obtaining the Commercial Driver's License (CDL) is a barrier to employment. Holmes Community College offers a Professional Truck Driver Training program, but requires that a student already have a CDL before they can be admitted to the training program.

Strategies:

- » Work with Holmes Community College to see if they will offer some type of assistance for students to obtain their CDL to be able enter their professional truck driving training program (or remove this criteria from the program and make obtaining the CDL a part of the course).
- » Work with Holmes Community College and other training providers to offer some short-term training to aid seasoned drivers in the use of electronic log systems.
- » Create a promotional piece about this profession that includes a list of area training providers that offer professional truck driving programs along with pay and benefit information. Distribute to high schools, career centers and adult education centers.
- » Develop a program to publicize openings and the training path to become a driver.
- » Attract more trucking contractors to operate in the region.

Develop the New Housing Industry within the Region

Due to the natural resources, products already manufactured in the region and availability of construction special trade skills in the workforce, the area is a good fit for the emerging pre-fabricated homes and housing components. The residential construction market has changed over the course of the last 10 years from small, independent, local contractors building single family dwellings to large companies that custom prefabricate major housing components then assemble the home on location. This allows the construction company to mass produce parts of the home and benefit from the economy of scale. Publicly traded shares on the top 10 builders were over 60% in 2017.

This industry would utilize natural resources as well as products such as HVAC units and plywood made in the area. This industry is also an excellent match for existing labor pool.

This new industry could also help address the need for population growth in the four Central Mississippi counties. It is important to attract population growth, and available housing is one way to attract people of all ages.

Develop the New Housing Industry Within the Region (Cont.)

Strategies

- » Work with local industries that are manufacturing products used by homebuilders to see if they already partner with the new type of home construction companies. This could help identify possible recruitment targets, or local manufacturers may decide to expand into this field.
- » Use incentives such as free or very low cost land to attract an existing home prefabricator company to expand into the Central Mississippi region.
- » Encourage/incentivize start-ups, this would be an excellent field for entrepreneurs.

Develop Employer Working Panels

During the employer focus group sessions that were held as part of this study, participants interacted eagerly and indicated a benefit from meeting with other employers. These employer consortiums could be used to generate strategies or serve as a catalyst for developing workforce skills improvement initiatives and training programs.

The employer panels should incorporate training providers into their meetings at least twice per year. Local training providers already meet with some employers one on one. It is also suggested that regional industry-specific panels be held. The panels would formalize the process and provide continuous updates on skill gaps and other issues.

Address Drug Treatment to Enlarge Potential Labor Reserves

Due to the prevalent use of drugs serving as a barrier to employment, employers and health care providers could create a regional drug-free workplace coalition to help those who are employed as well as those who apply for jobs. The national opioid epidemic has hit rural areas hard. Many people do not have access to treatment and become hopeless.

Similar programs have been shown to have long-term impacts on the individual employee and the overall workforce in the area. Rehabilitated employees have shown to be loyal to their employer who invested in their sobriety. Furthermore, investing in an employee's treatment can be less costly than high turnover. Lowering turnover has also shown benefits to overall employer morale.

Partnering with local hospitals, other health care providers and social service agencies could help reduce the cost of treatment and offer programs to individuals seeking employment or in danger of losing their job due to an addiction.

This type of program is a new and innovative way of battling local addiction problems and would serve as a tool in recruiting industry to the region. It would also have long-term benefits to employers while improving the quality of life in the region.