Franklin Hampshire Regional Employment Board

The Local Workforce Investment Board

Franklin Hampshire Workforce Area:

Labor Market Blueprint

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LMI Works

June 2012

Franklin Hampshire Workforce Area
Labor Market Blueprint

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Preface

The Franklin Hampshire Workforce Investment Area *Labor Market Blueprint* is a comprehensive review of the local industry employment structure, along with recent industry trends at the broad industry and detailed industry level. The FH Workforce Investment Area (WIA) includes not just Franklin and Hampshire counties, but also nine towns in the North Quabbin region. As there is quite a bit of industry variation within the Franklin Hampshire WIA, an examination of sub-areas including Franklin County, Hampshire County and the Athol NECTA[1] is included. Some tables illustrating Hampden County are offered for comparison.

The Blueprint is a companion piece to the Franklin Hampshire Regional Employment Board's Strategic Plan. The Blueprint shows us the here-and-now reality of the employment picture in our region, and identifies some of the trends. In each section, some workforce development implications of the data, synthesized from workforce board member, staff and partner discussions, are noted. The Strategic Plan builds on the strengths and tackles the challenges that the Blueprint points toward.

This 2012 document is the first update of the Blueprint since 2008, and it will inform and inspire new goals for the Franklin Hampshire Regional Employment Board for an update of its five-year Strategic Plan. Accomplishments of the 2007-2012 Plan appear in the Appendix.

It is the intent of this report to assist the Regional Employment Board as well as local employment, education and training organizations in developing effective workforce strategies. A better understanding of the labor market factors outlined in this report should help target resources that best match the needs of job seekers and program graduates with the hiring needs and requirements of local employers.

The document is more appropriate for planning than for job placement purposes. However, understanding the trends and major industries can help job seekers understand where employment opportunities may be more likely to exist. For education and training providers, knowing the key industries might assist employer outreach in developing new programs or modifying (or perhaps eliminating) existing programs. The employer size data calls attention to key employers who anchor the region. The commuting pattern data reinforces for both employers and job seekers that labor market and recruitment opportunities are not limited to the immediate Franklin/Hampshire Workforce Area.

We hope that you will find this updated picture of the Franklin Hampshire Workforce Investment Area informative and thought-provoking. Answers to "Frequently Asked Questions" appear at the end of the document, but we welcome additional comments and questions at the REB office at 413-773-1835.

Edward Nunez, Chair Franklin Hampshire Regional Employment Board	Patricia Crosby, Executive Director

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[1] The Athol Micropolitan NECTA (or "New England City and Town Area") comprises the towns of Athol, Orange, New Salem, Warwick and Wendell.

Franklin/Hampshire Labor Market Blueprint
Executive Summary

This overview of the Franklin Hampshire region's labor market includes five key components: Industry Employment Structure; Employment Trends; Industry Wages; Employment by Firm Size; and Journey to Work information. What follows is a summary of key findings in each of these areas.

I. Industry Employment Structure

- The largest sector in the Franklin/Hampshire Workforce Area is Educational Services. This sector accounts for nearly 1 in 4 jobs in the region, which is the largest share by a wide margin among the 16 Workforce Areas in Massachusetts.

- Health Care and Social Assistance is the second largest sector, representing 1 in 7 jobs (14.2%).

- The related sectors of Retail Trade (12.0%) and Accommodation and Food Services (8.5%) comprise 1 in 5 jobs (20.5%) within the region.

- Within the Goods Producing sector, Manufacturing (8.7%) and Construction (3.7%) account for 1 in 8 jobs (12.3%).

- There is some significant variation related to employment structure within the region. The most striking variation occurs in Manufacturing. While this sector comprises 8.7 % of all jobs in the region the respective shares in the Athol NECTA (24.1%) and Franklin County (13.7%) are substantially higher. Conversely, Manufacturing represents just 5.6% of all jobs in Hampshire County.

II. Employment Trends

- Between 2009 Third Quarter and 2011 Third Quarter, employment in the Franklin/Hampshire Workforce Area increased by 3.5% and added 3,006 jobs. The area growth rate exceeded the statewide rate of 2.7%.

- Employment growth was led by the largest sector Educational Services which added 838 jobs (4.5%). In addition, Professional and Technical Services increased the number of jobs by 319.

- Showing signs from the economic recovery, Construction grew by 242 jobs while Manufacturing increased employment by 149 jobs.

- A major source of concern is the slow growth in Health Care and Social Assistance. This sector has been a major source of growth until recently. During the period under review, employment increased by a mere 107 jobs or just 0.9%. Perhaps most significantly employment among Hospitals fell by 257 jobs.

- Most of the growth in the region occurred in Hampshire County. The overall growth rate of 4.6% exceeded the area average of 3.5%. In addition the 2,605 jobs generated in the county represented nearly 90% of the job growth in the region.

- Conversely, employment in Franklin County grew by just 1.9%, representing 472 jobs. Within the Athol NECTA, employment actually fell by 88 jobs or -1.3%.

III. Industry Wages

- The 2010 Average Annual Wage in Franklin/Hampshire was $729 per week or $37,908 annually. The area weekly wage was substantially below the statewide average of $1,112 ($57,824 annually).

- Significant wage variation occurs across industries. Utilities were the highest paying industry in Franklin/Hampshire ($1,435) followed by Finance and Insurance ($1,026).

- The sectors whose average wages were at least $900 per week included Professional and Technical Services ($958), Manufacturing ($911), Educational Services ($902) and Wholesale Trade($900).

- At the opposite end of the wage spectrum are Accommodation and Food Services ($271), Arts Entertainment and Recreation ($332) and Retail Trade ($484).

IV. Employment by Firm Size

- A clear dichotomy exists between how employers are distributed by size relative to where employment is concentrated.

- Among the 6,602 establishments in Franklin/Hampshire, 62.9% had fewer than 5 employees. These firms, however, accounted for just 7.5 % of all jobs in the region.

- Reinforcing this dichotomy is that nearly 90% of all establishments in Franklin/Hampshire have fewer than 20 employees but comprise less than 30% of total employment in the region.

- Conversely, the 133 employers in the region with at least 100 employees (1.7%) are responsible for 44% of the workforce area's employment.

V. Journey to Work

- Two thirds of the region's employed residents work in Franklin/Hampshire. Not surprisingly, Hampden County is the most common commuting destination with nearly 1 in 6 residents working in the county.

- From the employer vantage point, three quarters of their workforce comes from Franklin/Hampshire. This share is larger because of a net outflow of workers (12,354) from Franklin/Hampshire. In total, 93% of all workers come from Franklin/Hampshire (76%) and Hampden (17%).

- It appears from these findings that employers in Franklin/Hampshire are drawing from a smaller geographical area when compared to where residents are willing to travel for their jobs.

I. Industry Employment Structure: Franklin/Hampshire and Sub Areas

An important factor that helps determine the types of jobs potentially available in a region is the local industry structure. Table 1 provides information on the 2010 employment distribution by major industry (2 digit NAICS code) for the Franklin/Hampshire Workforce Area. Tables 2 through Table 4 provide similar information for Franklin County, Hampshire County and the Athol NECTA. As many residents commute to and from Hampden County, it was decided to also include that area in this section (see Table 5). Finally, Table 6 provides a comparison of industry shares for Franklin/Hampshire and all of the relevant sub areas. Table 6 is especially useful in delineating the significant industry variation within the region. It should be noted that 2010 is the latest year for which annual average industry data are available by Workforce Region.

As Table 1 indicates, Educational Services is by far the largest sector in the Franklin/Hampshire Workforce Area, accounting for nearly one quarter (23.1%) of all jobs. Among the 16 Workforce Regions in Massachusetts, Franklin/Hampshire has the largest employment share located in Educational Services by a wide margin.

Health Care and Social Assistance is the second largest sector in Franklin/Hampshire comprising 1 in 7 jobs (14.2%). Two related industries, Retail Trade (12.0%) and Accommodation and Food Services (8.5%) together represent 1 in 5 jobs (20.5%). Within the goods producing sector, Manufacturing (8.7%) and Construction (3.6%) account for I in 8 jobs (12.3%).

Two sectors that are also worth mentioning are Professional and Technical Services and Administrative and Waste Services. The former, which includes many high end industries that are large users of Scientific, Technical and Engineering personnel, is a very small sector in Franklin/Hampshire comprising just 2.4% of the region's employment. This share is substantially below the statewide share of 8.0%.

Administrative and Waste Services is also a very small sector in Franklin/Hampshire (2.7%) and also well below the state wide share of (5.0%). This sector is made up primarily of Temporary Help Services and Services to Buildings. While this finding may surprise some due to the widespread use of temporary and contract workers, it is important to remember that very often employment arrangements such as temporary assignments occur directly with the firm rather than through temporary agencies.

As mentioned above, Tables 2 through Table 5 provides similar information for the region's smaller sub areas as well as Hampden County. Table 6 provides a side by side comparison of employment shares and is especially useful for highlighting the variation in industry shares among several key sectors

The most striking variation occurs within Manufacturing. While this sector accounts for 8.7% of employment in the Franklin/Hampshire Workforce Area, it represents 13.7% of the jobs in Franklin County and nearly a quarter (24.1%) in the Athol NECTA. It should be noted that there is some geographic overlap between Franklin County and the Athol NECTA; most significantly Athol is part of the Franklin/Hampshire Workforce Area but is in Worcester County and not Franklin. By contrast, Manufacturing is just 5.6% of all jobs in Hampshire County.

There is also notable variation within Educational Services. This sector comprises more than one quarter of all jobs in Hampshire County (26.9%) as compared to Franklin County (16.0%) and Athol NECTA (13.7%). The share in neighboring Hampden County is even lower (10.2%) than the Franklin/Hampshire counterparts.

Much less variation exists in the two key sectors of Health Care and Social Assistance and Retail Trade. Within Health Care and Social Assistance, the largest share occurs in the Athol NECTA (16.1%) followed by Hampshire County (14.1%) and Franklin County (13.7%). Among the five areas included in Table 6, Hampden County has the highest employment share in Health Care and Social Assistance (20.1%).

In contrast to Manufacturing and Educational Services, the variation in Retail Trade employment shares is minimal. Within Hampshire County, Retail Trade comprises 12.5% of total employment which is comparable to Franklin County (11.3%) and the Athol NECTA (12.9%).

The variation in employment structure has some important implications for targeted workforce development efforts. Manufacturing continues to be a very large part of the Franklin County and Athol NECTA labor markets but is not nearly as prominent in Hampshire County. By contrast, Educational Services dominates Hampshire County and, in conjunction with Health Care and Social Assistance, represents 40% of all jobs in the county.

It is also important to note that several industries are critical throughout the Franklin/Hampshire Workforce Area and sub areas. Educational Services is the largest sector in both Franklin and Hampshire County and the third largest in the Athol NECTA. Health Care and Social Assistance is either the largest (Athol NECTA or Hampden County), second largest (Hampshire County and the Franklin/Hampshire Workforce Area) or third largest (Hampden). Thus overall labor market conditions will be widely influenced by how well or poorly these two sectors perform.

TABLE 1 INDUSTRY EMPLOYMENT STRUCTURE (2-DIGIT NAICS) FRANKLIN /HAMPSHIRE		
	2010 Annual	**Percent Total**
Total, All Industries	88,350	100.0
11 – Agriculture, Forestry, Fishing, Hunting	857	1.0
23 – Construction	3,145	3.6
31 – 33 – Manufacturing	7,678	8.7
Durable Goods	4,327	4.9
Non-Durable Goods	3,351	3.8
22 – Utilities	315	0.3
42 – Wholesale Trade	2,519	2.9
44 – 45 – Retail Trade	10,587	12.0
48 – 49 – Transportation and Warehousing	2,176	2.5
51 – Information	1,499	1.7
52 – Finance and Insurance	1,832	2.1
53 – Real Estate and Rental and Leasing	782	0.8
54 – Professional and Technical Services	2,084	2.4
55 – Management of Companies and Enterprises	1,118	1.3
56 – Administrative and Waste Services	2,414	2.7
61 – Educational Services	20,419	23.1
62 – Health Care and Social Assistance	12,566	14.2
71 – Arts, Entertainment, and Recreation	1,636	1.9
72 – Accommodation and Food Services	7,486	8.5
81 – Other Services except Public Administration	4,638	5.3
92 – Public Administration	4,555	5.2

TABLE 2 INDUSTRY EMPLOYMENT STRUCTURE (2-DIGIT NAICS) FRANKLIN COUNTY		
	2010 Annual	**Percent Total**
Total, All Industries	25,696	100.0
11 – Agriculture, Forestry, Fishing, Hunting	433	1.7
23 – Construction	976	3.8
31 – 33 – Manufacturing	3,523	13.7
Durable Goods	1,962	7.6
Non-Durable Goods	1,561	6.1
22 – Utilities	127	0.5
42 – Wholesale Trade	644	2.5
44 – 45 – Retail Trade	2,927	11.3
48 – 49 – Transportation and Warehousing	924	3.6
51 – Information	567	2.2
52 – Finance and Insurance	563	2.2
53 – Real Estate and Rental and Leasing	149	0.6
54 – Professional and Technical Services	447	1.7
55 – Management of Companies and Enterprises	526	2.0
56 – Administrative and Waste Services	623	2.4
61 – Educational Services	4,104	16.0
62 – Health Care and Social Assistance	3,502	13.6
71 – Arts, Entertainment, and Recreation	583	2.2
72 – Accommodation and Food Services	1,937	7.5
81 – Other Services except Public Administration	1,355	5.3
92 – Public Administration	1,768	6.9

TABLE 3 INDUSTRY EMPLOYMENT STRUCTURE (2-DIGIT NAICS) HAMPSHIRE COUNTY	2010 Annual	Percent Total
Total, All Industries	58,884	100.0
11 – Agriculture, Forestry, Fishing, Hunting	396	0.7
23 – Construction	2,071	3.5
31 – 33 – Manufacturing	3,308	5.6
Durable Goods	1,683	2.9
Non-Durable Goods	1,625	2.7
22 – Utilities	172	0.3
42 – Wholesale Trade	1,824	3.1
44 – 45 – Retail Trade	7,385	12.5
48 – 49 – Transportation and Warehousing	1,125	1.9
51 – Information	867	1.5
52 – Finance and Insurance	1,168	2.0
53 – Real Estate and Rental and Leasing	616	1.0
54 – Professional and Technical Services	1,588	2.7
55 – Management of Companies and Enterprises	562	1.0
56 – Administrative and Waste Services	1,689	2.9
61 – Educational Services	15,829	26.9
62 – Health Care and Social Assistance	8,290	14.1
71 – Arts, Entertainment, and Recreation	1,025	1.7
72 – Accommodation and Food Services	5,336	9.1
81 – Other Services except Public Administration	3,039	5.2
92 – Public Administration	2,569	4.4

TABLE 4
INDUSTRY EMPLOYMENT STRUCTURE (2-DIGIT NAICS)
ATHOL NETCA

	2010 Annual	Percent Total
Total, All Industries	5,557	100.0
11 – Agriculture, Forestry, Fishing, Hunting	Na	NA
23 – Construction	111	2.0
31 – 33 – Manufacturing	1,341	24.1
Durable Goods	1,036	18.6
Non-Durable Goods	305	5.5
22 – Utilities	26	0.5
42 – Wholesale Trade	72	1.3
44 – 45 – Retail Trade	718	12.9
48 – 49 – Transportation and Warehousing	164	2.9
51 – Information	85	1.5
52 – Finance and Insurance	129	2.3
53 – Real Estate and Rental and Leasing	27	0.5
54 – Professional and Technical Services	61	1.1
55 – Management of Companies and Enterprises	37	0.7
56 – Administrative and Waste Services	146	7.6
61 – Educational Services	760	13.7
62 – Health Care and Social Assistance	897	16.1
71 – Arts, Entertainment, and Recreation	40	0.7
72 – Accommodation and Food Services	298	5.4
81 – Other Services except Public Administration	387	7.0
92 – Public Administration	271	4.8

TABLE 5 For Comparison INDUSTRY EMPLOYMENT STRUCTURE (2-DIGIT NAICS) HAMPDEN WIA	2010 Annual	Percent Total
Total, All Industries	193,298	100.0
11 – Agriculture, Forestry, Fishing, Hunting	222	0.1
23 – Construction	7,069	3.7
31 – 33 – Manufacturing	19,785	10.2
Durable Goods	12,241	6.3
Non-Durable Goods	7,544	3.9
22 – Utilities	1,715	0.9
42 – Wholesale Trade	5,711	3.0
44 – 45 – Retail Trade	22,304	11.5
48 – 49 – Transportation and Warehousing	7,872	4.1
51 – Information	2,906	1.5
52 – Finance and Insurance	8,959	4.6
53 – Real Estate and Rental and Leasing	2,185	1.1
54 – Professional and Technical Services	5,296	2.7
55 – Management of Companies and Enterprises	2,697	1.4
56 – Administrative and Waste Services	6,798	3.5
61 – Educational Services	20,417	10.6
62 – Health Care and Social Assistance	38,866	20.1
71 – Arts, Entertainment, and Recreation	3,779	2.0
72 – Accommodation and Food Services	14,865	7.7
81 – Other Services except Public Administration	12,679	6.6
92 – Public Administration	9,106	4.7

TABLE 6 INDUSTRY EMPLOYMENT SHARE (2-DIGIT NAICS) A COMPARISON OF SELECTED AREAS 2010					
Description	F/H	Franklin	Hampshire	Athol	Hampden
Total, All Industries	100.0	100.0	100.0	100.0	100.0
11 – Agriculture, Forestry, Fishing, Hunting	1.0	1.7	0.7	NA	0.1
23 – Construction	3.6	3.8	3.5	2.0	3.7
31 – 33 – Manufacturing	8.7	13.7	5.6	24.1	10.2
Durable Goods	4.9	7.1	2.9	18.6	6.3
Non-Durable Goods	3.8	6.1	2.7	5.5	3.9
22 – Utilities	0.3	0.5	0.3	0.5	0.9
42 – Wholesale Trade	2.9	2.5	3.1	1.3	3.0
44 – 45 – Retail Trade	12.0	11.3	12.5	12.9	11.5
48 – 49 – Transportation and Warehousing	2.5	3.6	1.9	2.9	4.1
51 – Information	1.7	2.2	1.5	1.5	1.5
52 – Finance and Insurance	2.1	2.2	2.0	2.3	4.6
53 – Real Estate and Rental and Leasing	0.8	0.6	1.0	0.5	1.1
54 – Professional and Technical Services	2.4	1.7	2.7	1.1	2.7
55 – Management of Companies and Enterprises	1.3	2.0	1.0	0.7	1.4
56 – Administrative and Waste Services	2.7	2.4	2.9	2.6	3.5
61 – Educational Services	23.1	16.0	26.9	13.7	10.6
62 – Health Care and Social Assistance	14.2	13.6	14.1	16.1	20.1
71 – Arts, Entertainment, and Recreation	1.9	2.2	1.7	0.7	2.0
72 – Accommodation and Food Services	8.5	7.5	9.1	5.4	7.7
81 – Other Services except Public Administration	5.3	5.3	5.2	7.0	6.6
92 – Public Administration	5.2	6.9	4.4	4.8	4.7

WHAT ARE THE IMPLICATIONS FOR WORKFORCE DEVELOPMENT?

A strong workforce development region knows the lead industries in each of these prominent industry sectors and has a strategy for engaging them on behalf of both prospective and current workers.

Educational Services

The Five College Network of Smith, Hampshire, Amherst, Mt. Holyoke, and UMASS are among the largest 100 employers in the FH region, along with educational institutions such as Greenfield Community College, Deerfield Academy, Williston Northampton, the Clark School for Hearing, Northfield Mount Hermon, and an array of elementary and secondary schools. Through partnership with the Labor Management Workplace Education Program (LMWEP) at the University of Massachusetts, the Franklin Hampshire REB has helped to develop on-campus education and training programs that help frontline workers retain and advance in their jobs, and supported outreach to diverse populations to promote entry-level employment.

Healthcare/Social Assistance

Baystate Franklin Medical Center, Cooley Dickinson Hospital, Athol Memorial Hospital, Farren Care Center, the Center for Extended Care at Amherst, Charlene and Linda Manor Extended Care, Collective Home Care, Community Action, Servicenet, and the Northeast Center for Youth and Families are among the largest healthcare and social assistance employers in the region. Through partnership with Greenfield Community College, the Tripp Memorial Training Collaborative, the Center for New Americans and The Literacy Project, the Franklin Hampshire REB has helped to develop entry-level and accessible training for a wider array of diverse populations, upgraded skills and reduced turnover of incumbent staff, and improved quality of care by promoting culture change and on-going staff development and advancement.

Manufacturing

Yankee Candle Company, Berry Plastics, L.S. Starrett Co., Pelican Products, Argotec, Bete Fog Nozzle, Coca Cola, Lightlife, Millitech LLC, and Judd Wire are among the largest manufacturing companies located in the region, with products ranging from machine tools, plastics, and telecommunications devices, to candles and meatless food products. They are joined by a wide array of smaller, precision-machining companies such as VSS, Inc., Amherst Machine, Poplar Hill Machine, and Sisson Engineering, fulfilling orders for the defense, aerospace, medical device, and other industries. With the help of such community partners as Franklin County and Smith-Vocational Technical schools, and the Franklin Hampshire One Stop Career Center, the Franklin Hampshire REB helps many of these companies develop Workforce Training Fund proposals, upgrade worker skills, hold recruitment fairs, provide employee testing, and expand the education/training pipeline of current and future workers.

Retail and Accommodation/Food Services

Major retailers in the region include Stop and Shop, Walmart, Home Depot, Lowe's, Whole Foods Market, Big Y, and Hannaford's, and Accommodations /Food Service jobs are plentiful at a wide variety of large and small hotels and restaurants, including the Clarion, Hotel Northampton, and Lord Jeffery Inn. While some of these jobs are part-time and entry-level, they are important stepping-stones for youth and provide opportunities to seniors and others needing steady part-time work. Training programs in such areas as Customer Service and Sales can help workers obtain, keep and advance in jobs in these sectors, and the REB has also supported ServeSafe training in both English and Spanish.

Regional Differences

Workforce entities gain much by collaborating across regions, including Pioneer Valley wide with more urban areas in Hampden County. But the Industry Structure Tables also show some significant differences between the two regions that warrant consideration. Healthcare jobs are a fifth of employment in Hampden County, only about one-sixth in Franklin Hampshire, and further analysis shows a much higher proportion of those jobs are in long term care, not hospitals, requiring very different education/training pathways and strategies. Finance and Insurance Services are a far smaller portion of Franklin Hampshire jobs. On the other hand, Accommodations/Food Services and Agriculture are significantly larger sectors for us, and Educational Services account for twice as much employment in our area as it does in Hampden. These differences point toward a continuing need to attend to unique challenges and assets the region affords, not all of which may be addressed effectively by following the lead of larger urban areas.

II. Industry Employment Trends: Franklin/Hampshire Workforce Area and Sub Areas

The following section provides an assessment of employment trends by broad industry (2 digit NAICS) and by detailed industries between 2009 Third Quarter and 2011 Third Quarter. Included in this section are the following areas: Franklin/Hampshire Workforce Area, Franklin County, Hampshire County and the Athol NECTA. As a point of reference, broad industry trends for Hampden County are included in the Appendix.

Region-wide Industry Trends

The period under review represents the early stages of recovery from the great economic recession which began after Massachusetts employment levels peaked in April 2008; by November, 2009, the number of jobs had fallen by 142,000. Although Massachusetts has recaptured many of the jobs lost during the recession, employment in March 2012 remains 62,000 jobs below the pre-recession peak.

Industry data at the local level tends to lag behind state data by between six and nine months. As the local employment information is not seasonally adjusted, the third quarters were selected to avoid any confusion over seasonality. At the time this report was written, 2011 Third Quarter was the most current local industry employment data available.

Table 7 provides broad industry employment data for the Franklin/Hampshire Workforce Area between 2009 Third Quarter and 2011 Third Quarter. **During this period, the number of jobs increased by just over 3,000 or 3.5%.** The growth rate in the region exceeded the statewide rate of 2.7% over the same period. Employment growth was led by the largest sector, Educational Services, which added 838 jobs (4.5%). Above average growth rates were registered in Professional and Technical Services (16.9%) and Wholesale Trade (11.5%) which added 319 jobs and 277 jobs respectively. Although growth rates in Retail Trade and Accommodation and Food Services were slightly below the overall area average they did increase employment by 205 and 188.

There were also some positive developments in the Goods Producing sectors of Construction and Manufacturing. Showing signs of recovery from the housing decline, Construction grew by 242 jobs or 7.3%. Manufacturing also exhibited some encouraging signs by adding 149 jobs (2.0%). It should be noted that all of the Manufacturing gains were in Durable Goods with employment falling slightly in Non-Durable Goods.

The major source of concern is in Health Care and Social Assistance. This sector is the second largest in Franklin/Hampshire and has also been a major source of job growth until recently. Between 2009 Third Quarter and 2011 Third Quarter, Health Care and Social

Assistance added a mere 107 jobs, an increase of just 0.9 %. In addition, Transportation and Warehousing declined by 91 jobs.

Table 8 provides a more detailed review of industry developments in Franklin/Hampshire. As noted above, Educational Services was the largest source of employment growth. Table 8 reveals that almost half the growth (401 jobs) in this sector occurred among Colleges and Universities. With regard to Professional and Technical Services, the two primary sources of growth were Management and Technical Consulting (130 jobs) and Computer Systems Design (63 jobs).

The principal component of growth in the Trade sector occurred among Wholesale Grocery Products (264 jobs). Employment gains in Retail Trade were sprinkled across a number of different industries, although Clothing and Jewelry Stores did experience a loss of 83 jobs. Within Finance and Insurance, small gains in Banking (41 jobs) were in contrast to declines among Insurance Agents and Carriers (-9).

Despite the gains reported in Manufacturing, the job performance across the sector was quite uneven. Miscellaneous Manufacturing, which includes candle making, added 83 jobs, with smaller gains occurring in Machinery Manufacturing (32 jobs) and Computer and Electronics Manufacturing (13 jobs). At the same time the two largest industries within the Manufacturing Sector, Fabricated Metals and Plastics, fell nominally, while Paper Manufacturing shed 32 jobs.

A detailed review of Health Care and Social Assistance reveals some very important findings. Although the broad sector added 107 jobs, employment in Hospitals fell by 257 jobs and Nursing Homes lost 99 jobs. Recent efforts to curtail health care costs and in particular Medicare and Medicaid costs may have contributed to these job losses. The major contributors to employment gains in Health Care were Health Practitioners Offices (189 jobs) which includes Physical and Speech Therapists, Mental Health Therapists, Optometrists and Chiropractors and Residential Mental Health (91 jobs). Physicians' Offices, which has be growing sharply in many areas, increased by just 32 jobs. Within Social Assistance, Child Care Services added 45 jobs.

Among the remaining industries with gains worth noting were Amusement and Recreation (140 jobs), Food Services and Drinking Places (131 jobs), Accommodation (58 jobs), Automotive Repair (55 jobs), and Employment Services (30 jobs). Industries reporting job losses include Transit and Ground Transportation (-54), Membership and Social Organizations (-30) and Personal and Laundry Services (-21).

TABLE 7
INDUSTRY EMPLOYMENT TRENDS:
FRANKLIN/HAMPSHIRE WORKFORCE AREA
2009 3rd Quarter - 2011 3rd Quarter

Description	2009 3rd Quarter	20011 3rd Quarter	Absolute Change	Percent Change
Total, All Industries	**85,655**	**88,661**	**3,006**	**3.5**
11- Agriculture	910	1,169	259	28.5
23 - Construction	3,336	3,578	242	7.3
31-33 - Manufacturing	7,613	7.762	149	2.0
Durable Goods	4,350	4,533	183	4.2
Non-Durable Goods	3,263	3,229	-34	-1.4
22 - Utilities	292	305	13	4..4
42 - Wholesale Trade	2,409	2,686	277	11.5
44-45 - Retail Trade	10,401	10,606	205	2.0
48-49- Transportation and Warehousing	2,151	2,060	-91	-4.2
51 - Information	1,403	1,456	53	3.8
52 - Finance and Insurance	1,839	1,824	-15	-0.8
53- Real Estate and Leasing	801	778	-23	-2.9
54- Professional and Technical Services	1,887	2,206	319	16.9
56- Administrative and Waste Services	2,556	2,568	12	0.5
61 - Educational Services	18,429	19,267	838	4.5
62 - Health Care and Social Assistance	12,425	12,532	107	0.9
71 - Arts, Entertainment, and Recreation	1,726	1,876	150	8.7
72 - Accommodation and Food Services	7,443	7,631	188	2.5
81 - Other Services, Ex. Public Admin	4,521	4,732	211	4.7
92 - Public Administration	4,350	4,395	45	1.0

TABLE 8 DETAILED INDUSTRY EMPLOYMENT TRENDS: FRANKLIN/HAMPSHIRE WORKFORCE AREA 2009 3rd Quarter – 2011 3rd Quarter				
Description	2009 3rd Quarter	2011 3rd Quarter	Absolute Change	Percent Change
Total, All Industries	**85,655**	**88,661**	**3,006**	**3.5**
23 - Construction	**3,366**	**3,578**	**242**	**7.3**
236 Building Construction	721	786	65	1.9
238 Specialty Trade Contractors	1,822	1,987	165	9.1
31-33 - Manufacturing	**7,613**	**7,762**	**149**	**2.0**
311 Food Production	322	323	1	0.3
322 Paper Manufacturing	788	756	-32	-4.1
326 Plastics and Rubber	1,575	1,558	-17	-1.1
332 Fabricated Metals	1,681	1,679	-2	-0.1
333 Machinery Manufacturing	544	576	32	5.9
334 Computer and Electronics	634	647	13	2.0
339 Miscellaneous Manufacturing	670	753	83	12.4
42 - Wholesale Trade	**2,409**	**2,686**	**277**	**11.5**
4244 Wholesale Grocery Products	812	1,076	264	32.5
44-45 - Retail Trade	**10,401**	**10,606**	**205**	**2.0**
441 Motor Vehicle and Parts Dealers	1,004	1,023	19	1.9
4441 Building Materials and Supplies	812	853	41	5.0
4451 Grocery Stores	2,871	2,881	10	0.4
446 Health and Personal Care Stores	563	584	21	3.7
447 Gasoline Stations	550	570	20	3.6
448 Clothing and Jewelry Stores	500	417	-83	-16.6
4521 Department Stores	822	826	4	0.5
48-49 Transportation and Warehousing	**2,151**	**2,060**	**-91**	**-4.2**
484 Truck Transportation	332	320	-12	-3.6
489 Transit and Ground Transportation	747	693	-54	-7.2
51 - Information	**1,403**	**1,456**	**53**	**3.8**
5111 Newspapers, Books and Periodicals	618	605	-13	-2.1
517 Telecommunications	210	285	75	35.7
52 Finance and Insurance	**1,829**	**1,824**	**-15**	**-0.8**
522 Credit Intermediation and Banking	1,078	1,119	41	3.8
524 Insurance Agents and Carriers	647	549	-98	-15.1
54- Professional and Technical Services	**1,887**	**2,206**	**319**	**16.9**
5413 Architecture and Engineering	288	318	30	10.4
5415 Computer Systems Design	300	363	63	21.0

TABLE 8 DETAILED INDUSTRY EMPLOYMENT TRENDS: FRANKLIN/HAMPSHIRE WORKFORCE AREA 2009 3rd Quarter – 2011 3rd Quarter				
Description	**2009 3rd Quarter**	**2011 3rd Quarter**	**Absolute Change**	**Percent Change**
5416 Management and Technical Consulting	247	377	130	52.6
56 Administration and Waste Services	**2,556**	**2,568**	**12**	**0.5**
5613 Employment Services	1,005	1,035	30	3.0
5617 Services to Buildings	973	995	22	2.3
61 - Educational Services	**18,429**	**19,267**	**838**	**4.5**
6111 Elementary and Secondary Schools	7,108	7,287	179	2.5
6113 Colleges and Universities	9,898	10,299	401	4.1
62 - Health Care and Social Assistance	**12,425**	**12,532**	**107**	**0.9**
6211 Physicians Offices	1,454	1,486	32	2.2
6213 Health Practitioners Offices	458	647	189	41.2
6214 Outpatient Care Centers	427	442	15	3.5
6216 Home Health Care Services	588	613	25	4.2
622 Hospitals	3,381	3,124	-257	-7.6
623 Nursing and Residential Care	3,554	3,586	32	0.9
6231 Nursing Homes	2,113	2,014	-99	-4.7
6232 Residential Mental Health	475	566	91	19.2
6233 Community Care for the Elderly	521	501	-20	-3.8
624 Social Assistance	1,754	1,818	64	3.6
6241 Individual and Family Services	706	706	0	NA
6244 Child Care Services	544	589	45	8.3
71 - Arts, Entertainment, and Recreation	**1,726**	**1,876**	**150**	**8.7**
713 Amusement and Recreation	1,009	1,149	140	14.0
72 - Accommodation and Food Services	**7,443**	**7,631**	**189**	**2.5**
721 Accommodation	598	656	58	9.7
722 Food Services and Drinking Places	6,845	6,976	131	1.9
81 - Other Services, Ex. Public Admin	**4,521**	**4,732**	**211**	**4.7**
8111 Automotive Repair	578	633	55	9.5
812 Personal and Laundry Services	664	643	-21	-3.2
813 Membership and Social Orgs	1,348	1,318	-30	-2.2

Franklin County Industry Trends

The information presented in Table 9 clearly indicates that Franklin County grew at a much slower rate (1.9 %) than the overall Franklin/Hampshire Workforce Area (3.6%). In total, 472 jobs were added between 2009 Third Quarter and 2011 Third Quarter. Perhaps more significantly, in contrast to the entire Workforce Area, a number of industries experienced job declines, across a broad spectrum of the Franklin County's employment base. These include the Goods Producing industries of Construction (-7) and Manufacturing (-46) as well as Retail Trade (-79), Finance and Insurance (-61), Transportation and Warehousing (-47), Health care and Social Assistance (-39) and Information (-28).

Job growth in Franklin Hampshire was led by two unusual sources, the county's smallest sector Agriculture (+ 145 jobs) along with Arts, Entertainment and Recreation (+ 195 jobs). This reported growth must be viewed with caution. Both sectors are sensitive to industry and employment classification issues and may reflect the reassignment of employers and employees rather than representing the level of growth reported.

Among the remaining sectors experiencing job growth were Wholesale Trade (+108), Administration and Waste Services (+ 94), Accommodation and Food Services (+73), Educational Services (+52) and Utilities (+33).

Table 10 provides a more detailed industry employment review of Franklin County. Unfortunately, the detail that is available is related primarily to those industries experiencing employment declines. Due to confidentiality restrictions, a number of key industries, most notably Hospitals, did not have their respective employment levels published. The job declines in Manufacturing, while small, fell across most of the key industries including Fabricated Metals (-46), Plastics and Rubber (-32) and Paper Manufacturing (-22). One exception was Machine Manufacturing, which added 12 jobs. The detail in Health Care and Social Assistance reveals a decidedly mixed job performance. Within Health Care, Physicians Offices (+48), Health Practitioners Offices (+45), Home Health Services (+15) and Residential Mental Health (+37) all posted gains while Nursing Homes fell (-22). As noted above Hospitals as well as Outpatient Care centers and Community care for the Elderly did not have publishable data.

While limited outside Agriculture and Art, Entertainment and Recreation, job gains did occur in a small set of industries. These include Employment Service (+99), Food Services (+87), Individual and Family Services (+68) and Banking (+14).

TABLE 9 INDUSTRY EMPLOYMENT TRENDS: FRANKLIN COUNTY 2009 3rd Quarter - 2011 3rd Quarter				
Description	**2009 3rd Quarter**	**20011 3rd Quarter**	**Absolute Change**	**Percent Change**
Total, All Industries	**25,320**	**25,792**	**472**	**1.9**
11- Agriculture	436	581	145	33.2
23 - Construction	1,100	1,093	-7	-0.6
31-33 - Manufacturing	3,644	3,607	-37	-1.0
Durable Goods	2,057	2,066	9	0.4
Non-Durable Goods	1,587	1,541	-46	-2.9
22 - Utilities	95	130	35	36.8
42 - Wholesale Trade	581	689	108	18.6
44-45 - Retail Trade	3,045	2,966	-79	-2.6
48-49- Transportation and Warehousing	913	866	-47	-5.1
51 - Information	566	538	-28	-5.0
52 - Finance and Insurance	582	521	-61	-10.5
53- Real Estate and Leasing	149	126	-23	-15.4
54- Professional and Technical Services	430	475	45	10.5
56- Administrative and Waste Services	629	723	94	15.0
61 - Educational Services	3.599	3,651	52	1.4
62 - Health Care and Social Assistance	3,509	3,470	-39	-1.1
71 - Arts, Entertainment, and Recreation	590	785	195	33.0
72 - Accommodation and Food Services	1,979	2,052	73	3.7
81 - Other Services, Ex. Public Admin	1,315	1,328	13	1.0
92 - Public Administration	1,626	1,612	-12	-0.8

TABLE 10
DETAILED INDUSTRY EMPLOYMENT TRENDS:
FRANKLIN COUNTY
2009 3rd Quarter – 2011 3rd Quarter

Description	2009 3rd Quarter	2011 3rd Quarter	Absolute Change	Percent Change
Total, All Industries	**25,320**	**25,792**	**472**	**1.9**
23 - Construction	**1,100**	**1,093**	**-7**	**-0.6**
236 Building Construction	213	178	-35	-16.0
238 Specialty Trade Contractors	659	688	29	4.4
31-33 - Manufacturing	**3,644**	**3,607**	**-37**	**-1.0**
311 Food Manufacturing	220	223	3	1.7
322 Paper Manufacturing	288	261	-22	-7.6
326 Plastics and Rubber	902	870	-32	-3.5
332 Fabricated Metals	603	547	-46	-7.6
333 Machinery Manufacturing	404	416	12	3.0
44-45 - Retail Trade	**3,046**	**2,966**	**-79**	**-2.6**
441 Motor Vehicle and Parts Dealers	431	401	-30	-7.0
4441 Building Materials and Supplies	261	246	-15	-5.7
4451 Grocery Stores	869	839	-30	-3.5
446 Health and Personal Care Stores	165	161	-4	-2.4
447 Gasoline Stations	198	206	8	4.0
48-49 Transportation and Warehousing	**913**	**866**	**-47**	**-5.1**
484 Truck Transportation	130	120	-10	-16.9
485- Transit and Ground Transportation	204	177	-27	-13.2
51 - Information	**566**	**538**	**-28**	**-5.0**
5111 Newspapers, Books and Periodicals	343	327	-16	-4.7
52 - Finance and Insurance	**582**	**521**	**-61**	**-10.5**
522 Credit Intermediation and Banking	222	236	14	6.3
524 Insurance Agents and Carriers	345	239	-106	-30.7
56- Administrative and Waste Services	**629**	**723**	**94**	**15.0**
5613 Employment Services	197	296	99	50.2
5617 Services to Buildings	276	263	-14	-5.1
62 - Health Care and Social Assistance	**3,509**	**3,470**	**-39**	**-1.1**
6211 Physicians Offices	276	324	48	17.4
6213 Health Practitioners Offices	187	232	45	24.1
6214 Outpatient Care Centers	131	NA	NA	NA
6216 Home Health Care Services	362	377	15	4.1
622 Hospitals	NA	NA	NA	NA
623 Nursing and Residential Care	1,103	1,047	-56	-5.1
6231 Nursing Homes	687	665	-22	-3.2

TABLE 10 DETAILED INDUSTRY EMPLOYMENT TRENDS: FRANKLIN COUNTY 2009 3rd Quarter – 2011 3rd Quarter				
Description	2009 3rd Quarter	2011 3rd Quarter	Absolute Change	Percent Change
6232 Residential Mental Health	129	166	37	28.6
6233 Community Care for the Elderly	147	NA	NA	NA
624 Social Assistance	473	424	-49	-10.4
6241 Individual and Family Services	196	264	68	34.6
6244 Child Care Services	77	77	0	NA
71 - Arts, Entertainment, and Recreation	**590**	**785**	**195**	**33.0**
713 Amusement and Recreation	388	553	165	42.5
72 - Accommodation and Food Services	**1,979**	**2,052**	**73**	**3.7**
721 Accommodation	107	94	-13	-12.1
722 Food Services and Drinking Places	1,872	1,959	87	4.6
81 - Other Services, Ex. Public Admin	**1,315**	**1,328**	**13**	**1.0**
8111 Automotive Repair	157	163	6	3.8
812 Personal and Laundry Services	152	145	-7	-4.6
813 Membership and Social Orgs	471	430	-41	-8.7

WHAT ARE THE IMPLICATIONS FOR WORKFORCE DEVELOPMENT?

The very slow growth rate of jobs in Franklin County and significant declines across many industry areas are cause for concern. Workforce planners have engaged with the manufacturing community to determine which sub-sectors are most in need of skills gap remediation to ensure their viability, with the most progress being made in machine manufacturing. While data analysts note the need for caution when interpreting the sharp growth of Agriculture and Arts/Recreations jobs due to possible reclassification issues, workforce development entities in the region attest to a resurgence in agricultural business growth, with many new jobs available in farm markets and in the development of value-added products sold straight to the consumer. Red Fire Farm, Hagers Farm Market and Upinngil are just a few examples of farms that have expanded steadily in recent years, adding part and full-time jobs, some of them year-round. In the area of Recreation, local experts point to the continuing growth of outdoor recreation centers. Zoar Outdoor, for example, adds as many as 150 workers to its staff in the summer. The 32% growth in Wholesale Grocery trade may also offer some promise, and workforce planners may want to consider more focused partnership with companies such as C and S Wholesale.

Hampshire County Industry Trends

As the data in Table 11 indicate, Hampshire County has fared much better than their Franklin County counterparts. Job growth in Hampshire County was the reason the Franklin/Hampshire Workforce Area grew faster than the state as it accounts for 70% of total employment in the region. Between 2009 Third Quarter and 2011 Third Quarter, there were 2,606 jobs added, a growth rate of 4.6%. The Hampshire County growth rate far surpassed the 1.9% growth rate of Franklin County.

The largest source of growth in Hampshire County was Educational Services which added 763 jobs (5.3%). Strong growth was also registered in Professional and Technical Services which increased by 279 jobs, representing a growth rate of nearly 20%. Construction rebounded considerably as 244 jobs were generated, an increase of 11.5%. Among the remaining sectors reporting positive job gains were Retail Trade (+294), Health Care and Social Assistance (+230 jobs), Accommodation and Food Services (+175 jobs) and Wholesale Trade (+170 jobs).

Nominal employment increases also occurred in several sectors. These included Information (+72), Manufacturing (+60), Public Administration (+58) and Finance and Insurance (+48). The overall strength of the Hampshire County labor market was reinforced by the small number of sectors reporting nominal job declines. These sectors included Arts, Entertainment and Recreation (-41), Transportation and Warehousing (-34) and Administrative and Waste Services (-12).

Table 12 provides further insights regarding the industry employment performance of Hampshire County. As noted above, Educational Services were the largest source of growth. Colleges and Universities, which represents approximately two-thirds of the sector's employment in Hampshire County, added 430 jobs, while Elementary and Secondary Education was responsible for another 170 jobs.

The driving force within Professional and Technical Service was Management and Technical Consulting which more than doubled by generating 109 jobs. Smaller gains in this sector were posted by Computer Systems Design (+48) and Architecture and Engineering Services (+32). In contrast, the larger Employment Services industry was essentially flat (+5).

Within Retail Trade, job growth was led by Building Materials and Supplies (+186) which is consistent with the growth reported in Construction. The largest sector in Retail Trade, Grocery Stores, increased by just 36 jobs. Smaller gains were also registered in Motor Vehicles and Parts (+55) and Gasoline Stations (+23) as well as Health and Personal Care Stores (+24). The number of jobs in Clothing and Jewelry Stores fell by 54. Among Other Services, employment increases occurred in Membership and Social Organizations (+61) and Automotive Repair (+44).

The uneven employment performance of Health Care and Social Assistance is reinforced by the information presented in Table 12. While the overall sector added 230 jobs, a number of key components, in particular Hospitals (-172), shed jobs. Employment in both Nursing Homes (-37) and Physicians Offices (-5) also fell. These declines were offset by gains in Health Practitioners Offices (+118), Social Assistance (+99), Residential Mental Health (+58) and Community Care for the Elderly (+57).

TABLE 11
INDUSTRY EMPLOYMENT TRENDS:
HAMPSHIRE COUNTY
2009 3rd Quarter - 2011 3rd Quarter

Description	2009 3rd Quarter	20011 3rd Quarter	Absolute Change	Percent Change
Total, All Industries	**56.518**	**59,123**	**2,605**	**4.6**
11- Agriculture	444	534	90	20.2
23 - Construction	2,136	2,380	244	11.5
31-33 - Manufacturing	3,150	3,210	60	1.9
Durable Goods	1,628	1,701	73	4.4
Non-Durable Goods	1,522	1,509	-13	-0.9
22 - Utilities	179	158	-21	-11.7
42 - Wholesale Trade	1,778	1,948	170	9.6
44-45 - Retail Trade	7,076	7,370	294	4.2
48-49- Transportation and Warehousing	1,104	1.070	-34	-3.1
51 - Information	784	856	72	9.2
52 - Finance and Insurance	1,158	1,206	48	4.5
53- Real Estate and Leasing	640	644	4	0.6
54- Professional and Technical Services	1,402	1,681	279	19.9
56- Administrative and Waste Services	1,756	1,748	-12	-0.6
61 - Educational Services	14,446	15,209	763	5.3
62 - Health Care and Social Assistance	8,091	8,321	230	2.8
71 - Arts, Entertainment, and Recreation	1,097	1,056	-41	-3.7
72 - Accommodation and Food Services	5,218	5,393	175	3.4
81 - Other Services, Ex. Public Admin	2,962	3,155	193	6.5
92 - Public Administration	2,507	2,565	58	2.3

TABLE 12 DETAILED INDUSTRY EMPLOYMENT TRENDS: HAMPSHIRE COUNTY 2009 3rd Quarter – 2011 3rd Quarter				
Description	**2009 3rd Quarter**	**2011 3rd Quarter**	**Absolute Change**	**Percent Change**
Total, All Industries	**56,518**	**59,123**	**2,605**	**4.6**
23 - Construction	**2,136**	**2,380**	**244**	**21.2**
236 Building Construction	501	601	100	20.0
238 Specialty Trade Contractors	1,144	1,248	104	9.1
31-33 - Manufacturing	**3,150**	**3,210**	**60**	**1.9**
322 Paper Manufacturing	499	494	-5	-1.0
326 Plastics and Rubber	550	547	-3	-0.6
332 Fabricated Metals	464	421	-43	-9.3
334 Computer and Electronics	574	580	6	1.0
44-45 - Retail Trade	**7,076**	**7,370**	**294**	**4.2**
441 Motor Vehicle and Parts Dealers	530	585	55	10.4
4441 Building Materials and Supplies	411	597	186	45.2
4451 Grocery Stores	1,984	2020	36	1.8
446 Health and Personal Care Stores	353	377	24	6.8
447 Gasoline Stations	301	324	23	7.6
448 Clothing and Jewelry Stores	416	362	-54	-13.0
4521 Department Stores	629	635	8	1.0
48-49 Transportation and Warehousing	**1,104**	**1,070**	**-34**	**-3.1**
484 Truck Transportation	134	132	-2	-1.7
485 Transit and Ground Transportation	504	485	-19	-3.8
51 - Information	**784**	**856**	**72**	**9.2**
5111 Newspapers, Books and Periodicals	239	245	6	2.5
517 Telecommunications	158	205	47	29.7
52-Finance and Insurance	**1,158**	**1,206**	**48**	**4.5**
522 Credit Intermediation and Banking	779	806	27	3.5
524 Insurance Agents and Carriers	282	293	11	3.9
54 - Professional and Technical Services	**1,402**	**1,681**	**279**	**19.9**
5413 Architecture and Engineering	192	224	32	16.7
5415 Computer Systems Design	250	298	48	19.2
5416 Management and Technical Consulting	205	314	109	53.2
56 - Administrative and Waste Services	**1,758**	**1,746**	**-12**	**-0.6**
5613 Employment Services	720	725	5	0.7
5617 Services to Buildings	619	654	35	5.7

TABLE 12 DETAILED INDUSTRY EMPLOYMENT TRENDS: HAMPSHIRE COUNTY 2009 3rd Quarter – 2011 3rd Quarter				
Description	2009 3rd Quarter	2011 3rd Quarter	Absolute Change	Percent Change
61 - Educational Services	**14,446**	**15,209**	**763**	**5.3**
6111 Elementary and Secondary Schools	3,624	3,794	170	4.7
6113 Colleges and Universities	9,858	10,288	430	4.4
62 - Health Care and Social Assistance	**8,091**	**8,321**	**230**	**2.8**
6211 Physicians Offices	1,118	1,113	-5	-0.4
6213 Health Practitioners Offices	237	355	118	49.8
6214 Outpatient Care Centers	296	304	8	2.8
6216 Home Health Care Services	226	236	10	4.4
622 Hospitals	2,425	2,253	-172	-7.1
623 Nursing and Residential Care	2,177	2,315	138	6.3
6231 Nursing Homes	1,213	1,176	-37	-3.1
6232 Residential Mental Health	331	387	58	17.5
6233 Community Care for the Elderly	328	385	57	17.3
624 Social Assistance	1,135	1,234	99	8.7
6244 Child Care Services	440	486	46	10.5
71 - Arts, Entertainment, and Recreation	**1,097**	**1,056**	**-41**	**-3.7**
713 Amusement and Recreation	583	561	-22	-3.8
72 - Accommodation and Food Services	**5,218**	**5,393**	**175**	**3.4**
721 Accommodation	484	551	67	13.9
722 Food Services and Drinking Places	4,734	4,842	108	2.3
81 - Other Services, Ex. Public Admin	**2,962**	**3,155**	**193**	**6.5**
8111 Automotive Repair	400	444	44	11.0
812 Personal and Laundry Services	486	476	-10	-2.1
813 Membership and Social Orgs	839	900	61	7.3

WHAT ARE THE IMPLICATIONS FOR WORKFORCE DEVELOPMENT?

While initiatives in Franklin County may focus on Agriculture and Manufacturing, initiatives in Hampshire may be more effectively directed toward the Educational and Professional/Technical Service sectors. The region's higher education and secondary education entities are major drivers of job growth, and many of those jobs are front-line, technical and trade jobs with opportunities for training and advancement. Continued partnership with education/training programs such as the UMASS Labor/Management Workplace Education program are one way

Franklin Hampshire workforce planners can stay engaged with the educational services sector and expand onto additional campuses.

Professional/Technical Services, with a growth rate of nearly 20%, is another area warranting attention. Entry-level jobs in this sector tend to be better paid, and with a wealth of higher level education institutions in the region, there are many opportunities for advanced training in critical and emerging areas. Regional planners note in particular the growth of companies in creative game design, and the opportunities that industry provides for linkage to the creative economy network.

North Quabbin Industry Trends

This section concludes with a review of employment trends in the Athol NECTA, which is comprised of Athol, New Salem, Orange, Warwick and Wendell. As Table 13 indicates, the Athol NECTA has not fared well during the period under review, with total employment falling by 88 jobs (-1.6%). This decline has occurred despite the fact that the Manufacturing sector, the area's largest, increased by 120 jobs or 9.2 percent. Unfortunately, most of the other key sectors in the area lost jobs including Accommodation and Food Services (-78), Health Care and Social Assistance (-65), Educational Services (-15), Retail Trade (-25), Administrative and Waste Services (-77), Transportation and Warehousing (-13), and Public Administration (-13). Two sectors adding employment were Arts, Entertainment and Recreation (+34) and Wholesale Trade (+13) while Construction was essentially unchanged (+3).

Due to both the small size of the Athol NECTA as well as the confidentiality restrictions mentioned earlier, there is very limited detail provided in Table 14. The most positive piece of information is the growth reported in Fabricated Metal Manufacturing (+10).

Specific areas of employment decline include Food Services and Drinking Places (-78) and Motor Vehicles and Parts (-13). Within Health care and Social Assistance, the number of jobs fell in Nursing and residential care (-39) and Social Assistance (-18) while a small gain was reported in Ambulatory Health Services (+10) Employment in Hospitals was not published or available.

TABLE 13 INDUSTRY EMPLOYMENT TRENDS: ATHOL NECTA 2009 3rd Quarter - 2011 3rd Quarter				
Description	**2009 3rd Quarter**	**20011 3rd Quarter**	**Absolute Change**	**Percent Change**
Total, All Industries	**5,603**	**5,515**	**-88**	**-1.6**
23 - Construction	121	124	3	2.5
31-33 - Manufacturing	1,344	1,464	120	8.9
Durable Goods	1,049	1,146	97	9.2
Non-Durable Goods	295	318	23	7.8
42 - Wholesale Trade	62	75	13	21.0
44-45 - Retail Trade	731	706	-25	-3.4
48-49- Transportation and Warehousing	171	158	-13	-7.6
51 - Information	87	84	-3	-3.4
52 - Finance and Insurance	127	125	-2	-1.7
54- Professional and Technical Services	58	52	-6	-11.5
56- Administrative and Waste Services	202	125	-77	-38.1
61 - Educational Services	646	631	-15	-2.3
62 - Health Care and Social Assistance	925	860	-65	-7.0
71 - Arts, Entertainment, and Recreation	44	78	34	77.2
72 - Accommodation and Food Services	344	266	-78	-22.7
81 - Other Services, Ex. Public Admin	372	402	30	8.1
92 - Public Administration	278	261	-17	-6.1

TABLE 14 DETAILED INDUSTRY EMPLOYMENT TRENDS: ATHOL NECTA 2009 3rd Quarter – 2011 3rd Quarter				
Description	**2009 3rd Quarter**	**2011 3rd Quarter**	**Absolute Change**	**Percent Change**
Total, All Industries	**5,603**	**5,515**	**-88**	**-15.7**
23 - Construction	121	**124**	5	2.4
31-33 - Manufacturing	**1,344**	**1,464**	**120**	**8.9**
332 Fabricated Metals	869	976	107	12.3
44-45 - Retail Trade	**731**	**706**	**-25**	**-3.4**
441 Motor Vehicle and Parts Dealers	118	105	-13	-11.0
445 Food and Grocery Stores	186	190	4	2.2
52 Finance and Insurance	**121**	**125**	**4**	**3.3**
522 Credit Intermediation and Banking	99	99	0	NA
62 - Health Care and Social Assistance	**925**	**860**	**-65**	**-7.0**
621 Ambulatory Care Services	193	203	10	5.2
622 Hospitals	NA	NA	NA	NA
623 Nursing and Residential Care	287	248	-39	-13.6
624 Social Assistance	157	139	-18	-11.6
722 Food Services and Drinking Places	344	266	-78	-22.7
81 - Other Services, Ex. Public Admin	**372**	**402**	**30**	**8.1**
813 Membership and Social Orgs	123	116	-7	-5.7

WHAT ARE THE IMPLICATIONS FOR WORKFORCE DEVELOPMENT?

Job loss in the North Quabbin region is a serious concern, and heavy reliance on a few larger companies (e.g. L.S. Starrett and Athol Memorial Hospital) for the bulk of jobs is risky. With no community college in the immediate region and only a part-time, satellite Career Center office, workforce development activities opportunities are limited. However, development of a large grocery store site and accompanying plaza on Route 2, the successful merger of Athol Memorial with Heywood Hospital, and the small but steady uptick in jobs in Arts/Entertainment/ Recreation are encouraging, as is the fact that North Quabbin, more than any other sub-region, is retaining and even increasing its manufacturing jobs. Workforce development entities should make a concentrated effort to partner on small and larger education/training/outreach initiatives and capitalize on these encouraging signs.

III. Industry Wages: Franklin/Hampshire Workforce Area

The following section reviews the average annual wages by major sector in the Franklin/Hampshire Workforce Area by major industry sector as well as a comparison of the region's industry wage structure. The data in both Table 15 and Table 16 are for 2010, the most recent year in which annual average wage data are available. The average wage does not take into account hours worked but is derived by dividing total payroll by the total number of employees in each industry.

Table 15 illustrates clearly the wide variation in annual wages by industry group from the overall average of $729 per week which translates into $37,908 annually. Although a very small industry, the annual wage of $1,435 in Utilities is nearly double the overall average for Franklin/Hampshire. The only other industry with annual wage exceeding $1,000 per week is Finance and Insurance ($1,026).

Among the major sectors at or above $900 per week are Professional and Technical Services ($958), Manufacturing ($911), Educational Services ($902) and Wholesale Trade ($900). The Construction ($821), Information ($830) and Public Administration (($823) sectors also exceed the area average. The last remaining sector with above average wages is Health Care and Social Assistance, although the $781 weekly wage is just $53 per week in excess of the regions' overall average wage.

At the opposite end of the wage spectrum are Accommodation and Food Services ($271), Arts, Entertainment and Recreation ($332) and Retail Trade ($484). These sectors are all characterized by large numbers of part time workers, low wages, including many at minimum wage, and fairly large seasonal components. In addition, Administration and Waste Services, which is comprised primarily of Temporary Help Agencies and Services to Buildings at $577, is below the area average by $152.

Table 16 reveals a striking wage disparity between the Franklin Hampshire Workforce Area and Massachusetts across every major sector. The annual wage in Franklin/Hampshire is just two-thirds of the statewide average of $1,112 or $57,990 annually. Among the key sectors where the state differential relative to Franklin/Hampshire is especially pronounced are Finance and Insurance (+$1,192), Professional and Technical Services (+$981) and Information (+$867). While these differences may reflect in part a higher concentration of both corporate headquarters and technology firms in other parts of Massachusetts, especially Greater Boston, as well as higher cost of living, the size of these differentials is still surprising.

Two other sectors with notable wage differentials are Wholesale Trade ($625), Manufacturing ($533) and Public Administration ($320). Within the important Health Care and Social Assistance sector the differential is +$218. Interestingly, one of the lowest differentials (+$116) occurs in the region's largest industry, Educational Services.

Among the lowest paying sectors, the differential in Accommodation and Food Services is $101, although it should be noted that this is more than one third higher than the area average. The smallest differential occurs in Retail Trade (+$49) due in large part to the substantial number of workers at or near minimum wage. With regard to Administration and Waste Services, the wage differential of +$164 is approximately 30% above the Franklin/Hampshire average.

TABLE 15
FRANKLIN/HAMPSHIRE
AVERGAGE ANNUAL WAGE
(2-DIGIT NAICS): 2010

Description	2010 Annual	Difference From Area Average
Total, All Industries	**$ 729**	-
11- Agriculture, Forestry, Fishing & Hunting	$ 460	-269
23- Construction	$ 821	+92
31-33- Manufacturing	$ 911	+182
Durable Goods	$ 907	+178
Non-Durable Goods	$ 916	+197
22- Utilities	$1,435	+706
42- Wholesale Trade	$ 900	+171
44-45- Retail Trade	$ 484	-245
48-49- Transportation and Warehousing	$ 680	-49
51- Information	$ 830	+101
52- Finance and Insurance	$1,026	+297
53- Real Estate and Rental and Leasing	$ 619	-110
54- Professional and Technical Services	$ 958	+229
56- Administrative and Waste Services	$ 577	-152
61- Educational Services	$ 902	+173
62- Health Care and Social Assistance	$ 781	+53
71- Arts, Entertainment, and Recreation	$ 332	-397
72- Accommodation and Food Services	$ 271	-458
81- Other Services, Ex. Public Admin	$ 383	-346
92- Public Administration	$ 823	+94

TABLE 16 FRANKLIN/HAMPSHIRE AND MASSACHUSETTS AVERGAGE ANNUAL WAGE COMPARISON (2-DIGIT NAICS): 2010			
Description	**Franklin/ Hampshire Annual 2010**	**Mass Annual 2010**	**Difference Mass- F/H**
Total, All Industries	**$ 729**	**$ 1,112**	**+383**
11- Agriculture, Forestry, Fishing & Hunting	$ 460	$ 911	+451
23- Construction	$ 821	$ 1,084	+263
31-33- Manufacturing	$ 911	$ 1,444	+533
Durable Goods	$ 907	$ 1,612	+705
Non-Durable Goods	$ 916	$ 1,126	+210
22- Utilities	$ 1,435	$ 1,784	+349
42- Wholesale Trade	$ 900	$ 1,525	+625
44-45- Retail Trade	$ 484	$ 533	+49
48-49- Transportation and Warehousing	$ 680	$ 906	+226
51- Information	$ 830	$ 1,697	+867
52- Finance and Insurance	$ 1,026	$ 2,218	+1,192
53- Real Estate and Rental and Leasing	$ 619	$ 1,155	+536
54- Professional and Technical Services	$ 958	$ 1,939	+981
56- Administrative and Waste Services	$ 577	$ 741	+164
61- Educational Services	$ 902	$ 1,018	+116
62- Health Care and Social Assistance	$ 781	$ 999	+218
71- Arts, Entertainment, and Recreation	$ 332	$ 650	+318
72- Accommodation and Food Services	$ 271	$ 372	+101
81- Other Services, Ex. Public Admin	$ 383	$ 530	+147
92- Public Administration	$ 823	$ 1,143	+320

WHAT ARE THE IMPLICATIONS FOR WORKFORCE DEVELOPMENT?

Low wages in Franklin Hampshire in part reflect a lower cost of living as compared to other parts of the state, especially in the area of housing. From an economic development perspective, one could consider the lower wages in Franklin/Hampshire as a possible advantage in both attracting and retaining employers. In addition, the lower cost of living, high quality of life, and concentration of Colleges and Universities can all be viewed as positive factors in attracting business and supporting the economic growth and vitality of the Franklin/Hampshire Workforce region.

From a worker perspective, lower wages are, of course, an area of concern. According to the Poverty in America Living Wage Calculator (http://livingwage.mit.edu/), a single adult with one child must make $46,876/annum or $22.54 at 40hrs/wk in the FH region to sustain a family. Average wages in Retail, Food Service, Healthcare Support, and lower-level Social Assistance jobs are often half this amount, yet these are the jobs most readily available to disadvantaged or dislocated populations often required to confine themselves to short-term training timelines and immediate job search. Career Ladder programs which focus on short-term job placement but longer-term employee advancement pathways are a specialty of the Franklin Hampshire workforce area and have led to considerable success in such spheres as extended care, home health, and facilities. Pursuit of family-sustaining wages for residents also fuels the quest to develop affordable and accessible education/training options for preparing for manufacturing and health practitioner careers, where the wages frequently approach family-sustaining levels.

IV. Employment by Firm Size: Franklin/Hampshire Workforce Area

Table 17 provides information on the distribution of employment by the size of employers for both the Franklin/Hampshire Workforce Area and Massachusetts. The information in Table 17 clearly illustrates the dichotomy between how employers are distributed by size relative to where employment is concentrated. Quite simply, the importance of large employers (100+) cannot be overlooked, especially when developing targeted employer outreach and placement strategies.

Among the 6,602 establishments, 62.9% had fewer than 5 employees. These firms comprised, however, just 7.5% of all jobs. Expanding the review of the data to include employers with fewer than 20 employees reveals that 90% of all employers have fewer than 20 employees but these employers account for fewer than 30% of all jobs. In contrast to the small employers, 133 establishments (1.7%) reported having at least 100 employees and these firms accounted for almost 44% of all jobs. The share of employment in large companies is slightly below the statewide share of 49.2%.

The biggest difference in employment between Franklin/Hampshire and Massachusetts occurs in the 500+ employee category. Within Franklin/Hampshire, this group of employers accounted for 17.0% of total employment as compared to 23.1% in for Massachusetts, as a whole. The largest employers in Franklin/Hampshire encompass a wide range of industries including Hospitals, Colleges and Universities, Retail Trade and several Manufacturers.

TABLE 17
DISTRIBUTION OF ESTABLISHMENTS AND EMPLOYMENT BY SIZE GROUP
FRANKLIN/HAMPSHIRE WORKFORCE AREA AND MASSACHUSETTS
MARCH 2011

Size Group	# Establishments Franklin/Hampshire	Share of all Establishments	# Establishments State	Share of all Establishments
1 to 4	4,645	62.9%	142,365	63.3%
5 to 9	1,183	16.0%	33,591	14.9%
10-19	802	10.9%	22.642	10.1%
20-49	488	6.6%	15,911	7.1%
50 to 99	140	1.9%	5,525	2.4%
100 to 249	99	1.3%	3,432	1.5%
250 to 499	24	0.3%	894	0.4%
500 +	10	0.1%	570	0.3%
TOTAL	**7,391**	**100.0%**	**224,930**	**100.0%**

Size Group	# Employees Franklin/Hampshire	Share of all Employees	# Employees State	Share of all Employees
1 to 4	6,611	7.5%	187,744	6.0%
5 t0 9	7,938	9.0%	223,230	7.2%
10 to 19	10,917	12.4%	306,221	9.8%
20-49	14,841	16.8%	481,985	15.4%
50 to 99	9,288	10.5%	379,029	12.1%
100 to 249	14,708	16.7%	514,186	16.5%
250-499	8,909	10.1%	307,656	9.9%
500 +	14,976	17.0%	720,487	23.1%
TOTAL	**88,188**	**100.0%**	**3,120,538**	**100.0%**

Source: Quarterly Census of Employment and Wages (ES-202 Program) Prepared by: MA Department of Workforce Development, Division of Career Services, Economic Analysis Office

WHAT ARE THE IMPLICATIONS FOR WORKFORCE DEVELOPMENT?

44% of all payroll jobs in the Franklin Hampshire region are concentrated in 133 establishments. Even for a small Career Center Business Team and REB, 133 is a manageable number of employer relationships to broker, nurture, and develop. A strong workforce board will ensure its team has a working knowledge and good contacts with each of these companies. Ideally many of the companies will be represented on the Board itself.

With very small companies (under 20 employees) comprising 89.7% of businesses, Franklin Hampshire workforce partners should also provide technical assistance to help these companies access workforce development resources that may seem out of their reach due to limited capacity. The Board should consider forming consortia of employers for specific projects and redouble its efforts to promote small business-friendly aspects of the MA Workforce Training Fund such as HITG and Express grants.

V. Commuting Patterns: Franklin Hampshire

The final section of this report provides information of the commuting patterns in Franklin/Hampshire. The information included in Table 18 reflects both where employed Franklin/Hampshire residents reside as well as where those who work in Franklin/Hampshire come from. The intent of this section is to demonstrate that the relevant labor marker for job seekers looking for employment and firms looking for talent is much broader than the Franklin/Hampshire Workforce area boundaries. While this is true for most workforce areas, this perspective is especially critical because of the ease of commuting up and down Interstate 91 as well as traveling along Route 2.

As Table 18 indicates, two thirds of the employed residents work in Franklin/Hampshire. This obviously means one third leave the area for their jobs. Not surprisingly, Hampden County is the most common destination, with nearly 1 in 6 residents working in the county. Just over 5 % of the Franklin/Hampshire residents leave the state, primarily going to Vermont and, to a lesser extent, to Connecticut. The third most prominent employment source for Franklin/Hampshire residents is Berkshire County (4.3%) with the remainder sprinkled across other parts of Massachusetts including North Central and Central Massachusetts.

From the employer vantage point, three quarters of their workforce comes from Franklin/Hampshire. This share is larger because of the net outflow (12,354) of workers from Franklin/Hampshire. There are 109,032 employed residents and 96,678 individuals actually working in Franklin/Hampshire. The second major source of workers is Hampden County residents who account for 17% of those working in Franklin/Hampshire. Collectively, the Franklin/Hampshire residents (75% of all employed in the area) and the Hampden County residents (17%) account for 93% of all who are working in Franklin/Hampshire. As a result, it appears that employers in Franklin/Hampshire are drawing from a smaller geographical area when compared to where residents are willing to travel for their jobs.

ABLE 18 FRANKLIN/HAMPSHIRE JOURNEY TO WORK		
Description	Number	Percent of Total
Total Franklin/Hampshire residents who were employed and working in:	**109,032**	**100.0**
Franklin/Hampshire	72,993	66.9
Hampden County	16,438	15.1
Berkshire County	4,742	4.3
Central Mass/Greater Worcester	2,802	2.6
North Central MA-Gardner-Fitchburg	3,029	2.8
Other Parts of MA	2,987	2.8
Other States	6,051	5.5
Total Number of persons working in Franklin/Hampshire that lived in:	**96,678**	**100.0**
Franklin/Hampshire	72,993	75.5
Hampden County	16,498	17.1
Berkshire County	1,778	1.8
Central MA	779	0.8
North Central MA	636	0.7
Other Parts of MA	1,179	1.2.2
Other States	2,815	2.9

Source: American Community Survey, US Census Bureau

WHAT ARE THE IMPLICATIONS FOR WORKFORCE DEVELOPMENT?

While a third of Franklin Hampshire residents may commute outside the area to work, over two-thirds, due to preference or—even more often—transportation or financial constraints, do not. Economic development efforts focused on the Springfield/Holyoke/Chicopee regions alone will not create accessible jobs for low-income, basic skill residents. Franklin Hampshire needs leadership among its own economic development entities to create, in partnership with workforce development, new opportunities for its residents. Broad-based, unified, and persistent advocacy for broadband access and a major transit center have yielded excellent results and could become a springboard for major innovation and job creation in the Franklin Hampshire region.

Frequently Asked Questions

Q. Do the numbers in the charts include just private sector employment or all employment?

A. All of the industries except Public Administration include both private and public employees. Thus UMass and Deerfield Academy would both be included in Educational Services (NAICS 61).

Q. How is the average wage calculated? How do we account for the fact that the FH average wage is so much lower than the statewide average?

A. The average is calculated by dividing total payroll by the total number of employees. It does not account for hours worked. That is why there is not a corresponding average hourly wage. Other than the fact that the cost of living is lower in Western Massachusetts, relative to Greater Boston, there is no evident reason why the wages are so much lower across all industry groups.

Q. Are self-employed people included in these tallies?

A. Self employed people, or anyone working as a 1099 or off the books, are not included in the numbers.

Q. This research was completed in 2012, but the data is from 2010 or before. Why is that?

A. The ES 202 data which was used for most of the report is a universe count and not a sample of employers based on the quarterly employment reports filed by employers for Unemployment Insurance tax purposes. It is the most comprehensive and reliable industry data available. However, because it is a count of over 200,000 establishments, the data lags between 6 and 9 months. At the time the report was prepared, 2011 Third Quarter was the most current data available and was used for the employment trend tables. The structure tables used 2010 as that was the most recent annual data available.

Q. What is the best way to use this document as a job seeker? As an employer? As a planner?

A. The document is more appropriate for planning than job placement purposes. Understanding the trends and major industry employers can help job seekers understand where employment opportunities may be more likely to exist. For education and training providers, knowing the key industries might assist employer outreach in developing new programs or modifying (or perhaps eliminating) existing programs. The employer size data can also help signal the importance of large employers who are often overlooked. The commuting pattern data reinforces for both employers and job seekers that labor market and recruitment opportunities are not limited to the immediate Franklin/Hampshire Workforce Area.

Q. Why are occupational projections not included?

A. Occupational projections were not included because they are not reliable, especially for smaller geographic areas like Franklin/Hampshire. They also point only to starting and endpoints and do not address any developments in the current business cycle.

Q. How can we extract information about the non-profit sector in this region, for example arts and service non-profits?

A. The two groups actually represent a very small share of employment in the area but the share is slightly larger than for the state as whole. Beyond the report, there is occupational data available which delineates the specific occupations and their employment shares for the groups mentioned. It's also important to note that in the arts, many people are self employed and not included in the industry employment numbers.

Q. How are these data sets collected, and when and how often are they updated? Is this data available in one publically accessible place?

A. The ES 202 Data is explained above. The simplest explanation is it is in the UI Quarterly Employment Report. The ES 202 data is available on the MASS DWD website in the labor market information section. The industry wage data was also derived from the ES 202 reports. The commuting pattern data was derived from the American Community Survey, a household survey conducted by the US Census Bureau. The data was obtained from a data file and is not available on the DWD website.

Q. Why the focus on Industry data rather than Occupational data?

A. The Industry data determines the overall economic activity as well as the occupational composition of an area. There is also more consistent, reliable data published on an industry basis. There is information about the occupational structure of industries both on the DWD web site and the Mass Job Guides which may be more useful for job placement purposes.

Q. How does a company get categorized as a particular industry? Can this change from year to year?

A. Each establishment fills out a product/service statement every three years for the research department at DWD. This is the basis for the classification. Keep in mind, that each location is classified, not an entire company. A company such as Coca Cola or Yankee Candle may have multiple industry assignments that will vary by location.

Q. What factors make an employment trend more or less important?

A. For large industries, how did they do relative to the rest of the area? Are they moving in the same or opposite direction? Obviously industries declining when the area is growing or vice versa are noteworthy. For smaller industries, the focus should be more on the size of any changes (absolute) rather than relative or percent changes.

Q. What factors are important to keep in mind when looking at wage comparisons?

A. One of the problems with overall average wages is that the level of experience is not identified. Obviously entry level wages will usually be lower than for experienced positions except for some occupations with low wage or minimum wage employers. Ultimately, the wages will reflect a variety of factors including the current labor market. The weaker the labor market the more leverage the employers have with regard to the wages offered.

Q. What is a NECTA?

A. NECTA stands for New England City and Town Area. They are comparable to the old Labor Market Areas. Outside of New England, counties are typically used to designate areas rather than cities and towns

Q. What is NAICS?

A. NAICS stands for North American Industry Classification System.

Q. Does the data include government employees? What about employees in non-profit organizations?

A. Government employees are included in a number of industries: Education and Health Care are two of the most prevalent ones. The ES 202 data can delineate Federal, State and Local Government employment separately, but it was not done for this report. As long as a non-profit is covered under the Commonwealth's Unemployment Insurance laws and files quarterly, they are included.

Q. Do the Tables of Industry Employment Structure reflect the number of FH residents who work in this industry, or the number of jobs in this industry located n FH?

A. All of the employment tables in the report are based on where the jobs are located; they are not residence based.

Q. What period is "Third Quarter" data and why was this particular Quarter selected?

A. The third quarter (July-September) was used as it was the most current data available at the time the report was written, Since the data are not seasonally adjusted, the same quarter in each year must be used for comparison purposes in order to avoid the influence of seasonality.

Q. Can I find this data for individual businesses?

A. Due to confidentiality laws, the employment data for individual establishments is not available to the public.

Q. Can I find data about the types of businesses that are included in an industry sector?

A. A complete list of the NAICS codes is available. The simplest way to obtain a listing is to search "NAICS" on the Web. You can look up industries by the 2, 3, 4 or 6 digit NAICS codes from the broad to the very detailed. It will tell you the specific types of industries that are included. For most purposes, going as far as the 4 digit level of detail is sufficient.