



WORKFORCE PIPELINE ASSESSMENT

MARCH 2021

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INTRODUCTION

In 2016, Boyette Strategic Advisors (Boyette) was engaged to complete a workforce and skills analysis of a 27-county region of East Kentucky. That study was done as the most significant declines in the coal industry were occurring in the region, and it was focused on understanding the skills of the coal workforce and identifying opportunities to transition those workers into other sectors. In 2020, Boyette began work on a follow-up to that study in the same 27-county region.

The Morehead-Rowan County Economic Development Council (MRCEDC) engaged Boyette to maximize the data collection and analysis of the EKYWorks 2.0 project by taking a deeper dive into the Rowan County regional workforce. This Workforce Pipeline Assessment provides in-depth data focused on seven key sectors to better position the Alliance to meet the workforce demand of current and future employers.

Understanding the skills and abilities of the workforce is a critical step in attracting job creation and capital investment to the community. The results of this Pipeline Assessment will provide the information necessary to quantify the quality and availability of the regional workforce.

METHODOLOGY

This Workforce Pipeline Assessment includes analysis of the skills and abilities of the Rowan County labor market area workforce, particularly related to industry demands, talent pipeline and the impact of future automation. Additionally, it evaluates a variety of data points related to the regional workforce, including defining the regional labor market area for Rowan County.

Boyette utilized input collected through EKYWorks 2.0 that is specific to Rowan County. To ensure that this data is accurate and valid, Boyette worked with the MRCEDC to encourage adequate response rates to online surveys being fielded throughout the region. Additionally, Boyette also conducted interviews and discussions with major county employers to discuss their workforce needs and challenges.

MOREHEAD – ROWAN COUNTY FOCUS SECTORS

- Aerospace/Aviation
- Agricultural Technology
- Automotive
- Distribution/Logistics
- Healthcare
- Manufacturing Technology
- Wood Products

In addition to interviews, surveys sought input from the following groups:

- Employers
- Residents/Job Seekers
- High School Students
- High School Counselors

The analysis examined data points related to demographics, labor force, commuting patterns, skills attainment, and employment trends in the Rowan County region. The following components were collected and analyzed as part of this process:

- Stakeholder discussions with employers, educators, and community leaders;
- Online surveys of employers, residents/job seekers, high school counselors, and high school students;
- An analysis of occupational demand in seven key sectors;
- A review of workforce education and training offerings related to the targeted sectors; and
- A review of key statistical and demographic data.

A thorough analysis of all data collected led to identification of important trends related to assets and challenges of the existing workforce, available training opportunities, and future trends that will impact the quality and availability of the regional workforce.

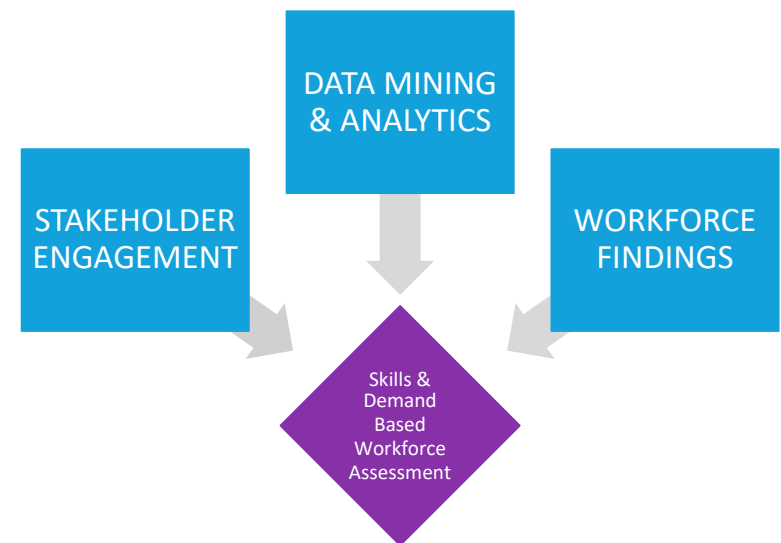
To accurately define the Rowan County labor market area is based on an analysis of commuting patterns. This analysis utilized Census Journey to Work" data, as well as resident zip code data from key employers. Additionally, commuting information collected in the online surveys for EKYWorks 2.0 were also analyzed specific to Rowan County.

DATA SOURCES

The following data sources were utilized to thoroughly assess the workforce in Rowan County:

- Economic Modeling Specialists, Inc. (Emsi)
- Esri Business Analyst
- U.S. Census Bureau
- U.S. Bureau of Labor Statistics
- Kentucky Department of Education
- Sperling's Best Places

Additional secondary research was also conducted, along with stakeholder input.



FINDINGS

The data collected and analyzed for this workforce pipeline assessment has led to identification of important workforce assets in the Rowan County area, as well as challenges and opportunities to enhance the workforce to better meet the demands of current and future employers. Data points were further validated through stakeholder conversations and surveys with residents/job seekers, employers, students, and partners in Rowan County. Key findings from this research included the following:

- Employers are generally very satisfied with workforce skills across the Rowan County Labor Market Area, but availability is an issue for many
- Perceptions about careers in manufacturing and the skilled trades are somewhat negative, particularly among students
- While there is very little presence of the Aerospace/Aviation sector, the region does have significant employment in occupations that are compatible to those specific to the Aerospace sector.
- The specific skills gaps that currently exist are in occupations that are employed by multiple key sectors in Rowan County, creating increased demand and additional availability challenges
- The GenZ population is eager to stay in the region, but diverse opportunities for employment are lacking

More detailed findings are included below.

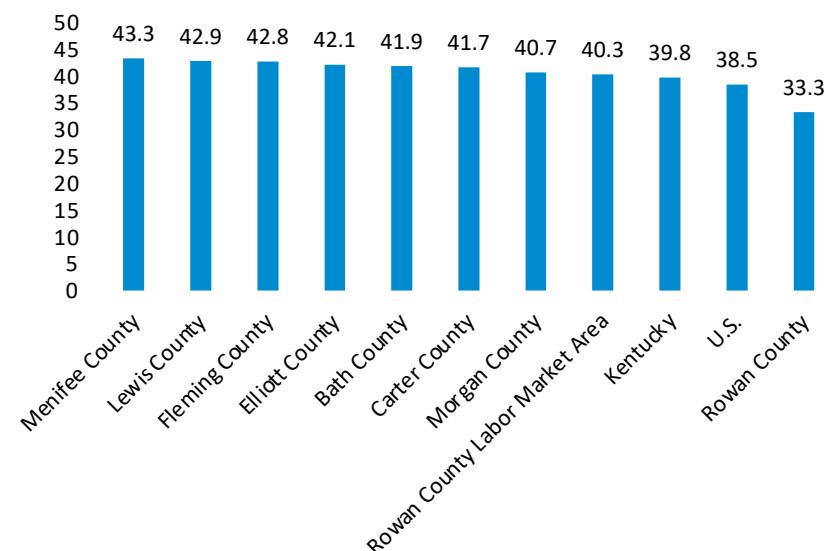
DEMOGRAPHICS

Data points related to demographics, labor force, wages, and key occupations were examined. This data analysis focuses on general characteristics of the population, along with specific occupational needs of employers in the seven identified target sectors. Following are key findings of that analysis:

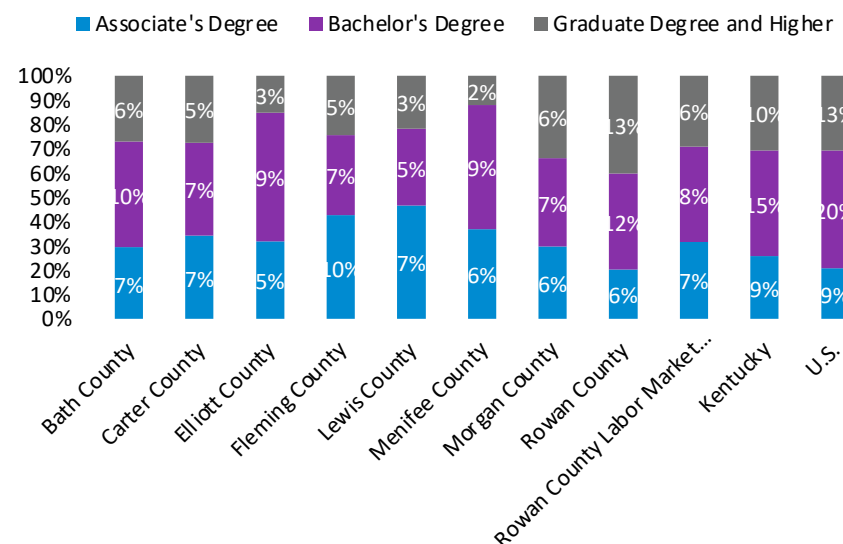
- The eight-county Labor Market Area has seen a very minimal population decline from 2016 to 2021. Among the individual counties, Lewis has had the greatest decline at three percent, followed by Carter at two percent. All other counties have seen small population increases during the last five years.
- Similar numbers are projected for the next five years, again with the labor market area have a very small decline in population driven by declines in Carter and Lewis counties. The eight-county labor market area is projected to have a total population of 118,688 in 2026.

- Rowan County has a median age of 33.3, which is considerable younger than all other analyzed areas. This is likely due, in large part, to the presence of Morehead State University in the county. The labor market area has a median age of 40.3, with Menifee County reporting the highest at 43.3.
- The level of educational attainment is highest in Rowan County, as well, with 25 percent of the population age 25 and older holding a bachelor's or master's degree. In the labor market area, that level of educational attainment drops to 14 percent. If associate degrees are added in, Rowan County has a total of 31 percent holding those degrees, compared to a total of 21 percent in the labor market area, while only 15 percent of Lewis County residents hold any kind of degree.
- All regional geographies have lower levels of income than what is found in Kentucky and the U.S. Fleming County has the highest average household income among the labor market counties at \$64,616, while the labor market average is \$51,991. At \$44,990, Elliott has the lowest average household income.
- Fleming County also reports the highest per capita income at \$26,092, while the labor market average is \$20,185 with Rowan County at \$20,834.
- Elliott County's low income levels equate to high poverty levels at 29.85 percent. Fleming County has the lowest poverty rate at 17.17 percent, which is slightly better than the state poverty level. The labor market area falls in the median at 24.81 percent, with four counties above that level and four below.

Median Age



Educational Attainment



- The cost of living in the region is very low, with every county in the region having an overall composite between 74 and 79. Housing costs are the lowest of the component scores, with groceries and transportation among the highest.

Rowan County Labor Market Area



WORKFORCE

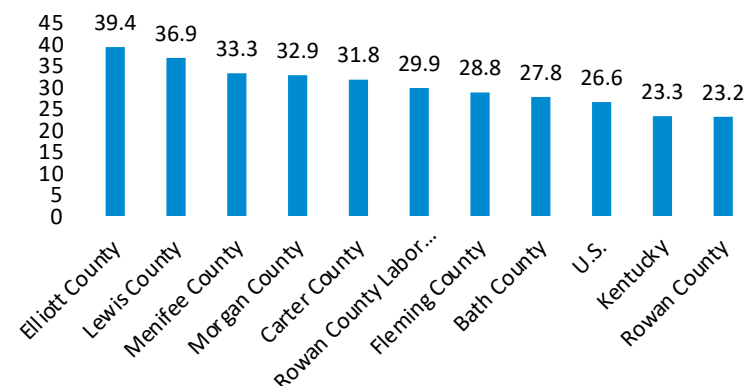
- The Rowan County Labor Market Area comprises eight counties, including Bath, Carter, Elliott, Fleming, Lewis, Meniffee and Morgan, in addition to Rowan.
- The regional labor force has declined by approximately 6,500 since 2011 and currently totals 43,349. The most significant drop occurred between 2011 and 2016, when approximately 5,000 left the regional workforce. Between 2016 and early 2020, there was an increase of about 550, but that increase was lost during the Covid-19 pandemic.

		Rowan County Labor Market Area	Bath County	Carter County	Elliott County	Fleming County	Lewis County	Meniffee County	Morgan County	Rowan County
Labor Force	2011	49,857	4,835	11,696	2,331	6,466	5,517	2,543	5,232	11,237
	2016	44,944	4,759	9,943	2,099	5,945	4,745	2,393	4,486	10,574
	20-Mar	45,495	4,674	9,927	2,105	6,130	4,707	2,355	4,671	10,926
	20-Dec	43,349	4,528	9,557	1,983	6,182	4,448	2,267	4,475	9,909
Employment	2011	43,853	4,224	10,079	1,963	5,779	4,799	4,799	4,656	10,168
	2016	41,248	4,406	8,888	1,856	5,572	4,275	4,275	4,124	9,942
	20-Mar	41,778	4,265	9,040	1,874	5,720	4,201	4,201	4,318	10,230
	20-Dec	40,083	4,215	8,652	1,805	5,820	4,055	4,055	4,172	9,300
Unemployment Rate	2011	12.6%	12.6%	13.8%	15.8%	10.6%	13.0%	14.1%	11.0%	9.5%
	2016	8.6%	7.4%	10.6%	11.6%	6.3%	9.9%	8.7%	8.1%	6.0%
	20-Mar	8.7%	8.8%	8.9%	11.0%	6.7%	10.7%	9.6%	7.6%	6.4%
	20-Dec	7.8%	6.9%	9.5%	9.0%	5.9%	8.8%	9.0%	6.8%	6.1%
Labor Participation Rate		44.3%	54.7%	42.5%	27.6%	58.0%	42.1%	47.7%	35.5%	52.4%
Prime Age Labor Participation Rate		58.8%	78.4%	58.0%	30.9%	75.5%	59.4%	69.8%	48.2%	71.6%

Source: U.S. Bureau of Labor Statistics

- Those declines in the workforce are seen also in the low labor participation rates in the region. The overall labor market area has a labor participation rate of 44.3 percent, compared to a state rate of 57.2 percent and a U.S. rate of 61.3 percent.
- Fleming and Rowan counties have the highest participation rates at 58.0 percent and 52.4 percent respectively. Elliott County has the lowest participation rate at 26.6 percent.
- Total employment in the region has also declined, but at a slower pace that has the total workforce, which should indicate a tightening in workforce availability. In 2011, the total employed represented 87.6 percent of the workforce, where that is now at 92.5 percent. Conversely, unemployment has declined from 12.6 percent in 2011 to 7.8 percent in December 2020.
- Rowan County is the only area with an average commute time to work lower than the state and U.S. averages. All other counties in the labor market area have commute times above the state and national numbers, with Elliott County reporting the highest commute time of 39.4 minutes one way to work.
- Among resident survey respondents, almost 40 percent reported a commute of 10 minutes or less, with only 3.2 percent saying they drive more than an hour one way.
- Given the impact of Covid-19 on the economy and employment, industry sectors have been identified as either Essential or Non-essential. The Non-essential sectors are more strongly impacted by Covid-related job losses than are the Essential sectors that have continued to operate at or near their full potential. In the Rowan County Labor Market Area, almost 55 percent of jobs are considered Essential, which represents more than 17,700 jobs.
- Employment by essential sectors is projected to remain flat over the next five years, while non-essential sectors are expected to increase employment by seven percent during that period.

Average Commute to Work for Workers
16+



	2021 Jobs	Percentage of Jobs
Essential	17,704	54.96%
Non-Essential	14,507	45.04%
Total	32,211	

- This study identified 15 occupations that are employed in multiple sectors in the region and are projected to have availability challenges in the future talent pipeline. All but two of those occupations are employed in Manufacturing Technology, with 10 employed in Wood Products and nine in Agricultural Technology. Those high-demand occupations include First-Line Supervisors of Production and Operating Workers; Heavy and Tractor-Trailer Truck Drivers; Inspectors, Testers, Sorters, Samplers, and Weighers; and Maintenance and Repair Workers, General.
- The Aerospace/Aviation sector reports virtually no employment in the region. For that reason, opportunities for compatible occupations and skills transferability have been identified to provide a potential workforce to employers in this sector.

EDUCATION

- All K-12 school districts in the Labor Market Area have attendance rates that are very similar to the state average of 94.2 percent, with dropout rates reported to be lower than the state rate of 1.3 percent.
- Carter County has the largest school enrollment in the region with 4,108 students, compared to Rowan at 3,261. In Meniffee County, 84.1 percent of students are economically disadvantaged, which is the highest percentage among the eight counties. Rowan County has the lowest percentage of disadvantaged students at 64 percent.
- More than 6,300 regional residents have earned ACT WorkKeys career readiness certificates, with more than 1,700 being awarded to high school students.
- A wide variety of Career and Technical education programs are available in the Labor Market Area, with programs focused on agriculture having the highest overall enrollment numbers. Business, Family Consumer Sciences, and Marketing also among the highest enrollment programs.
- Morehead State University offers programs in Engineering Technology and Engineering/Industrial Management, both of which are among the top programs from a degree award perspective. Other large programs are primarily in the areas of healthcare and education.

	Enrollment	% Econ Disadv	Attendance Rate	Dropout Rate
Bath	1,955	72.6%	93%	0.8%
Carter	4,108	66.9%	93.2%	0.5%
Elliott	1,005	77.9%	92%	0.4%
Fleming	2,146	64.4%	95%	0.1%
Lewis	2,122	72.8%	92.9%	0.3%
Meniffee	935	84.1%	93.5%	0.2%
Morgan	1,908	71.5%	93%	0.4%
Rowan	3,261	64.0%	93.6%	0.3%
Kentucky	647,987	60.8%	94.2%	1.3%

STAKEHOLDER ENGAGEMENT

Stakeholder engagement is a critical component of a thorough workforce analysis. Input from educators, employers, and residents/job seekers provides important perspective and serves to validate the data components. This Workforce Pipeline Assessment included interviews with employers and educators, in addition to online surveys, which were fielded with the following groups:

- Employers
- Residents/Job Seekers
- High School Students
- High School Counselors

Note: The surveys were part of the larger EKYWorks 2.0 workforce study being conducted simultaneously in 27 counties, including Rowan. The survey findings are based on only those respondents from Rowan County.

Approximately 250 stakeholders across the area provided input into this project through these engagement opportunities. Following is a summary of findings from stakeholder engagement:

Stakeholder Discussion Findings

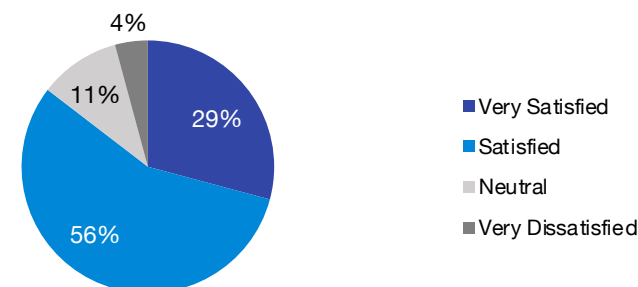
- Employers indicated that the Rowan County workforce is loyal, with most saying they have very low turnover rates at the Rowan County facilities.
- Several of those interviewed said that most employees have a strong work ethic and generally good soft skills, with some saying if available workers have strong soft skills, they can train them for the technical skill needs.
- When thinking of challenges, some employers said workforce availability is an issue that may grow more severe as several new employers begin staffing their facilities.
- There appears to be a negative perception of manufacturing and skilled trades job opportunities, with concerns expressed about low interest in skilled trades courses in the high schools and a lack of adequate career counseling for students.
- Maysville Community and Technical College was cited as a good source for industry training, including its allied health and tech-based programs.
- Many students may want to stay in the area after completing their educations, but there are not enough job opportunities for them.

Survey Audience	Responses
Employers	48
Residents/Job Seekers	95
High School Students	91
High School Counselors	5
Interviews	7
TOTAL	246

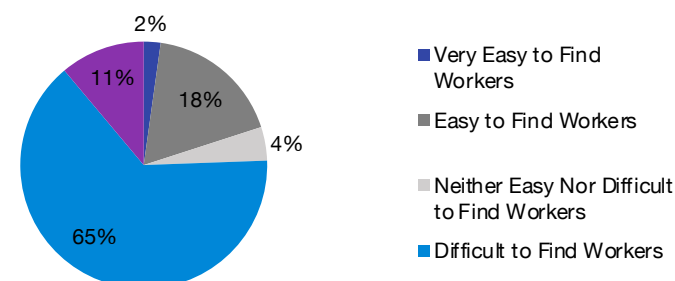
Survey Findings - Employers

- Two-thirds of respondents have been employers in East Kentucky for more than 20 years. A similar number said that an available and skilled workforce was important or very important in their decision to locate in the region.
- Respondents represented a wide variety of business sectors and employment size.
- More than 85 percent of regional employers are satisfied or very satisfied with their employees. Only four percent report being very dissatisfied.
- Employer/employee relationships were ranked very high by employers, with almost 90 percent satisfied or very satisfied. Productivity and trainability were also rated high. Punctuality had the highest dissatisfaction level at 13 percent.
- More than three-quarters of employers find it difficult or very difficult to find the workers they need. The lack of technical skills is the most common challenge in employee recruitment, followed by lack of required educational background.
- Only 17 percent of employers believe the cost of labor is more expensive when compared to quality.
- Approximately 42 percent of employers report that a high school diploma or GED is the education level required for the majority of positions, with an additional 14 percent having no education requirement.
- More than half of employers report a turnover rate that is less than five percent, while 15 percent say their turnover rate is more than 30 percent.

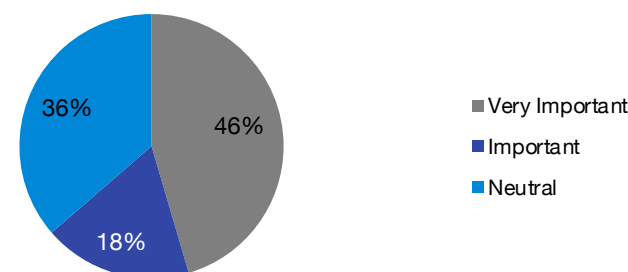
Please rate your overall satisfaction with the employees you hire in East Kentucky:



Please rate the overall employee availability in East Kentucky:



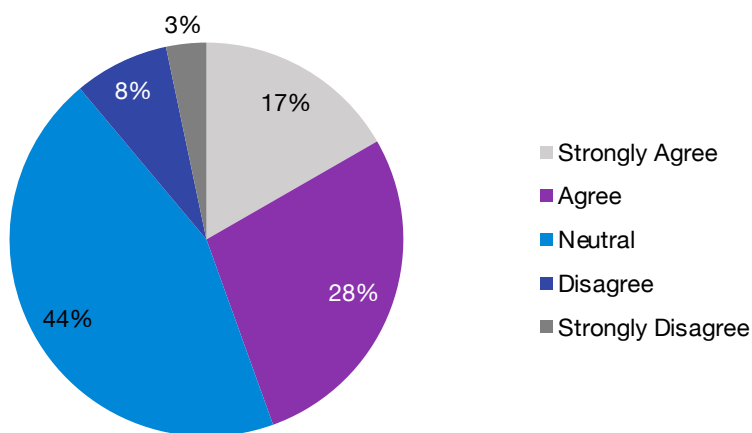
What role did an available and skilled workforce play in your decision to locate in East Kentucky?



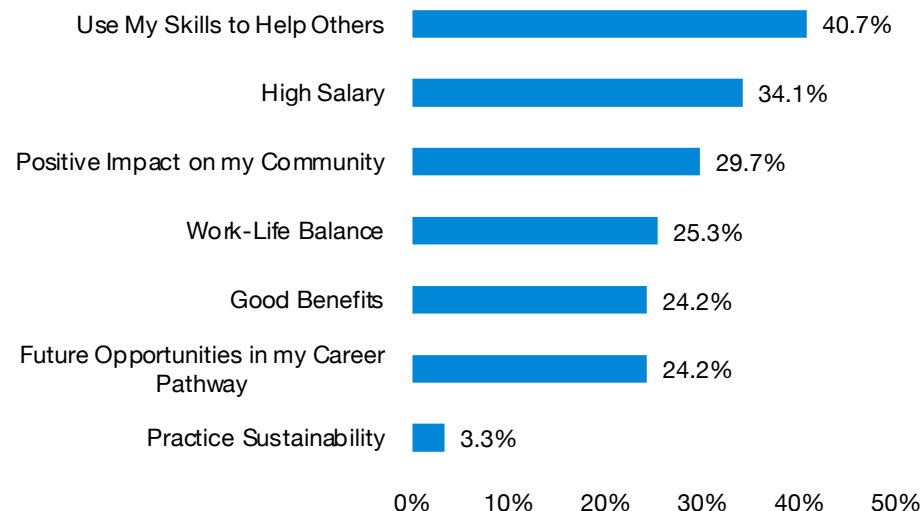
Survey Findings – High School Students

- Approximately one-quarter of high school students say life experiences will have the greatest impact on choosing their career pathway, with 21 percent saying parents, mother, or father are most influential.
- Only 14 percent believe that their schools do not provide adequate opportunities to explore a range of careers.
- Almost half of students say their families expect them to enroll in a four-year college after high school, with 9 percent enrolling in a community college.
- Healthcare and nursing are the most common career choices among high school students, followed by arts/entertainment and education. Only two percent indicate an interest in manufacturing.
- Approximately 80 percent view manufacturing and skilled trades as respectable occupations, but only 45 percent believe they provide good career opportunities.
- Using their skills to help others is the most important factor for students in choosing a career. A high salary and a positive impact on the community were at two and three in order of importance.

Middle-skill occupations (medical technicians, paralegals, plumbing, carpentry), which require more than a high school diploma but less than a bachelor's degree, offer high wages and good opportunities for me.



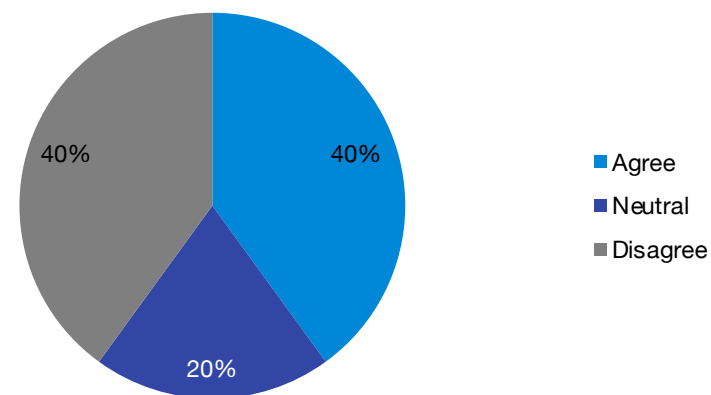
What is important to you in choosing your future career/job? (Please choose up to two options.)



Survey Findings – High School Counselors

- A majority of high school counselors say they use one-on-one conversations to provide career counseling to students.
- Two-thirds of counselors indicate that they spend less than 25 percent of their time providing career guidance to students.
- Counselors believe that parents have the greatest influence on students' career choices, followed by life experiences.
- Approximately 40 percent of counselors say their students do not believe they can find job opportunities in their chosen career in Kentucky.

My students believe they can find job opportunities in their chosen career field in East Kentucky.



WORKFORCE PROFILE

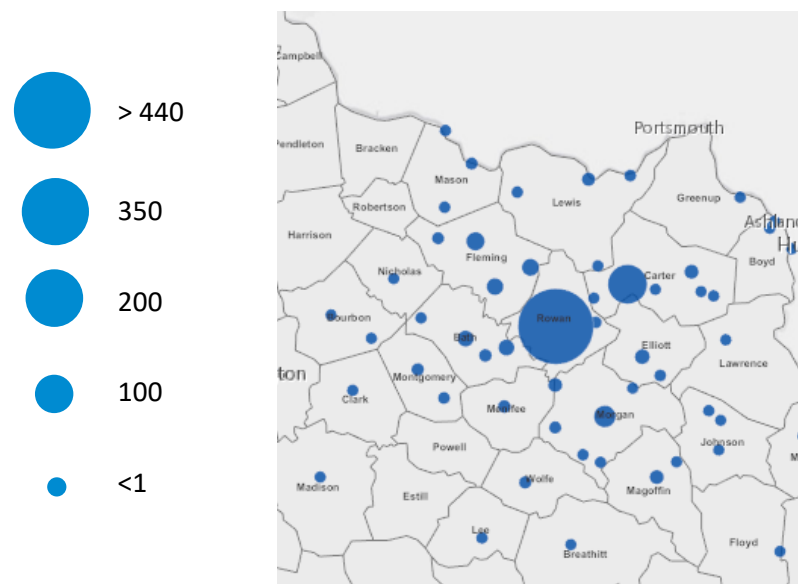
GEOGRAPHIES

The Rowan County Labor Market Area includes eight counties in Kentucky. To determine the Labor Market Area, home Zip Code data for the workforce of a number of major employers in Rowan County were obtained and analyzed to determine from which counties workers in Rowan County commute. There were approximately 1,181 zip codes provided and the result of that analysis is illustrated in a heat map showing the areas with the highest number of residents working in the Labor Market Area, as seen in the image in the bottom right.

Rowan County Labor Market Area



Employee Zip Code Map



POPULATION

Of the eight counties analyzed, Menifee County has the smallest population at nearly 7,000, and Carter County has the largest population at nearly 27,000 followed by Rowan County at nearly 25,000. From 2016 to 2021, Fleming, Menifee, Morgan, and Rowan counties along with the Commonwealth of Kentucky experienced a 1 percent increase in population. Carter and Lewis counties experienced a decrease in population at 2 and 3 percent respectively, and the Rowan County Labor Market Area experienced a small decrease in population at -0.15%. Bath County experienced a population increase equal to that of the U.S. at 3 percent.

Bath County and the U.S. are projected to experience a 2 percent increase in population over the next five years, followed by Fleming County, Menifee County and the Commonwealth of Kentucky at 1 percent.

	Population (2016)	Population (2021)	Change	% Change
Menifee County	6,449	6,529	80	1%
Elliott County	7,491	7,527	36	0.48%
Bath County	12,246	12,659	413	3%
Morgan County	13,260	13,344	84	1%
Lewis County	13,516	13,127	(389)	(3%)
Fleming County	14,481	14,624	143	1%
Rowan County	24,416	24,541	125	1%
Carter County	27,304	26,637	(667)	(2%)
Rowan County Labor Market Area	119,163	118,989	(174)	(0.15%)
Kentucky	4,438,182	4,499,494	61,312	1%
U.S.	322,941,311	332,855,403	9,914,092	3%

	Population (2021)	Population (2026)	Change	% Change
Menifee County	6,529	6,587	58	1%
Elliott County	7,527	7,540	13	0%
Bath County	12,659	12,896	237	2%
Lewis County	13,127	12,874	(254)	(2%)
Morgan County	13,344	13,345	1	0%
Fleming County	14,624	14,723	98	1%
Rowan County	24,541	24,549	9	0.04%
Carter County	26,637	26,174	(463)	(2%)
Rowan County Labor Market Area	118,989	118,688	(301)	(0.25%)
Kentucky	4,499,494	4,541,223	41,729	1%
U.S.	332,855,403	340,092,434	7,237,031	2%

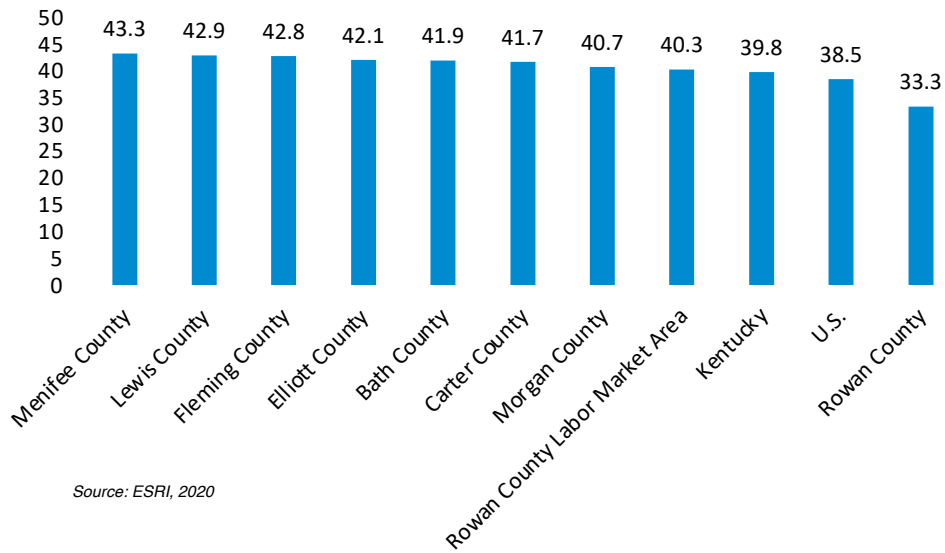
Source: EMSI Class of Worker Data 2021.1

AGE

Menifee County has the highest median age at 43.3 years old, followed by Lewis County at 42.9 years, Fleming County at 42.8 years, Elliott County at 42.1 years, Bath County at 41.9 years, Carter County at 41.7 years, Morgan County at 40.7 years, Rowan County Labor Market Area at 40.3 years, the Commonwealth of Kentucky at 39.8 years, the U.S. at 38.5 years, and Rowan County at 33.3 years.

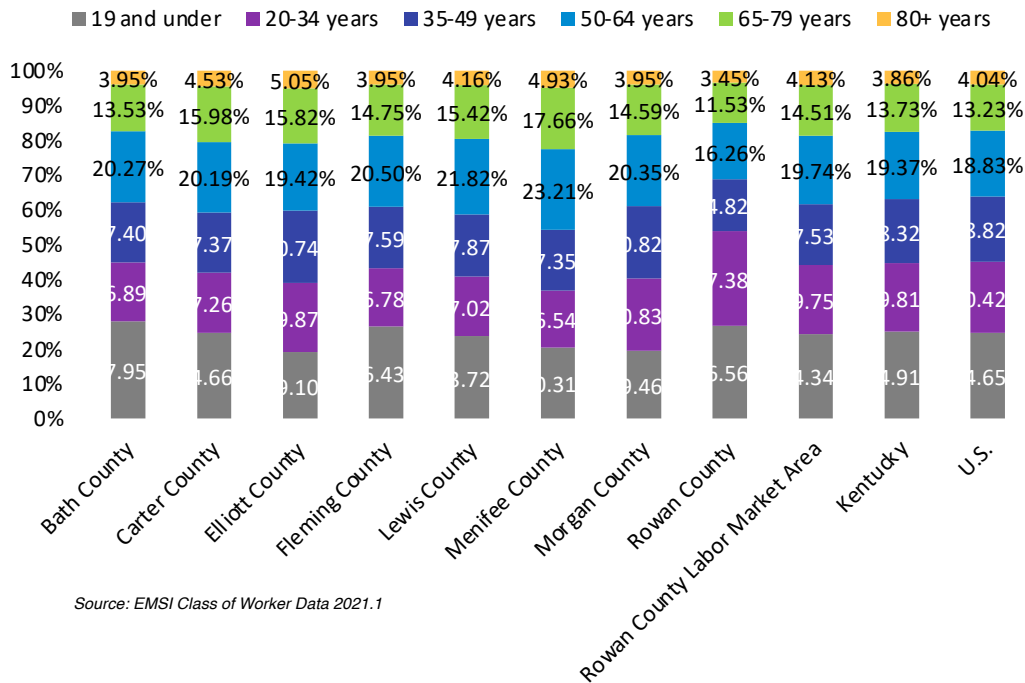
The age breakdown for all geographies is on par with those 34 years and younger, representing around 40 percent of the population for all geographies and representing over 50 percent for Rowan County.

Median Age



Source: ESRI, 2020

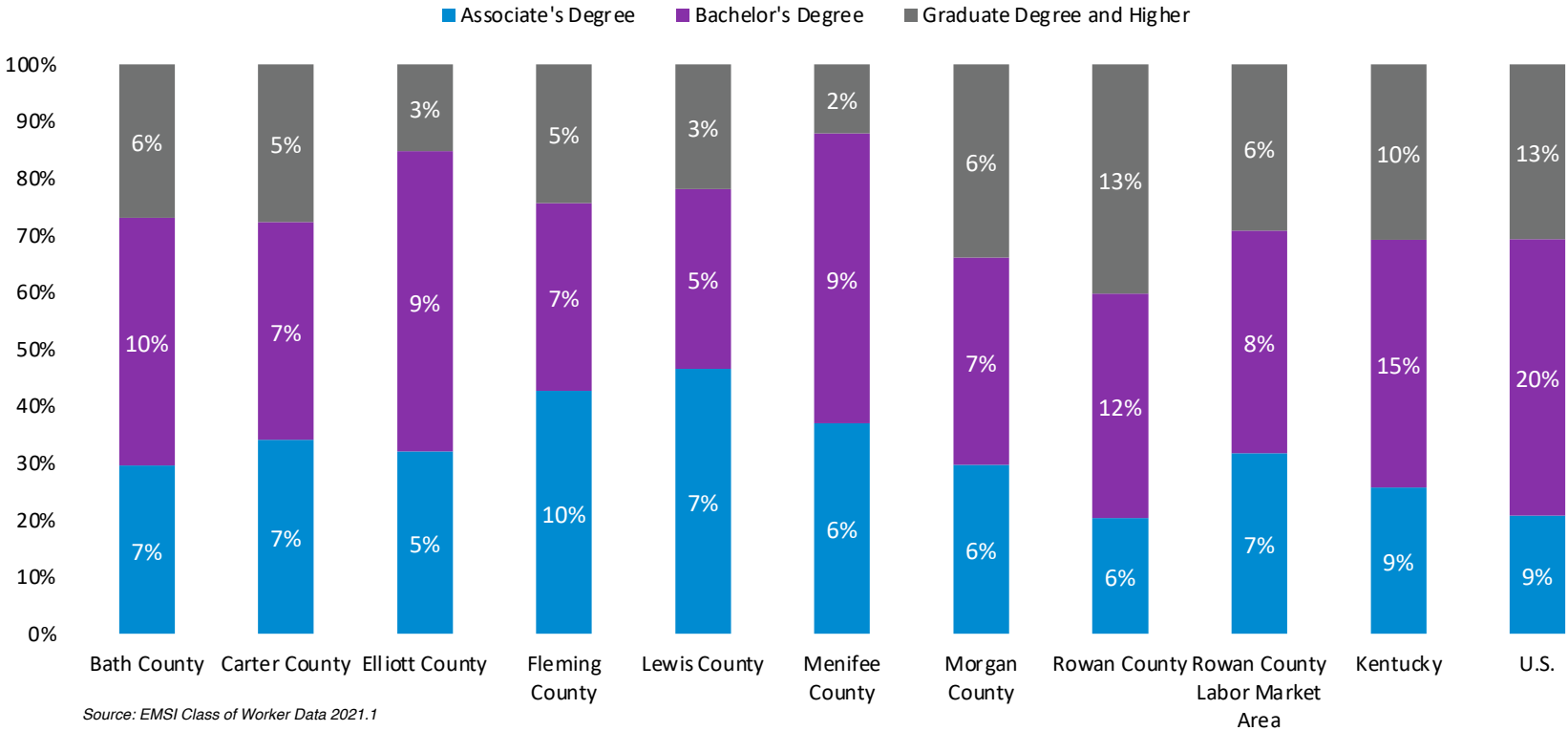
Age Breakdown



Source: EMSI Class of Worker Data 2021.1

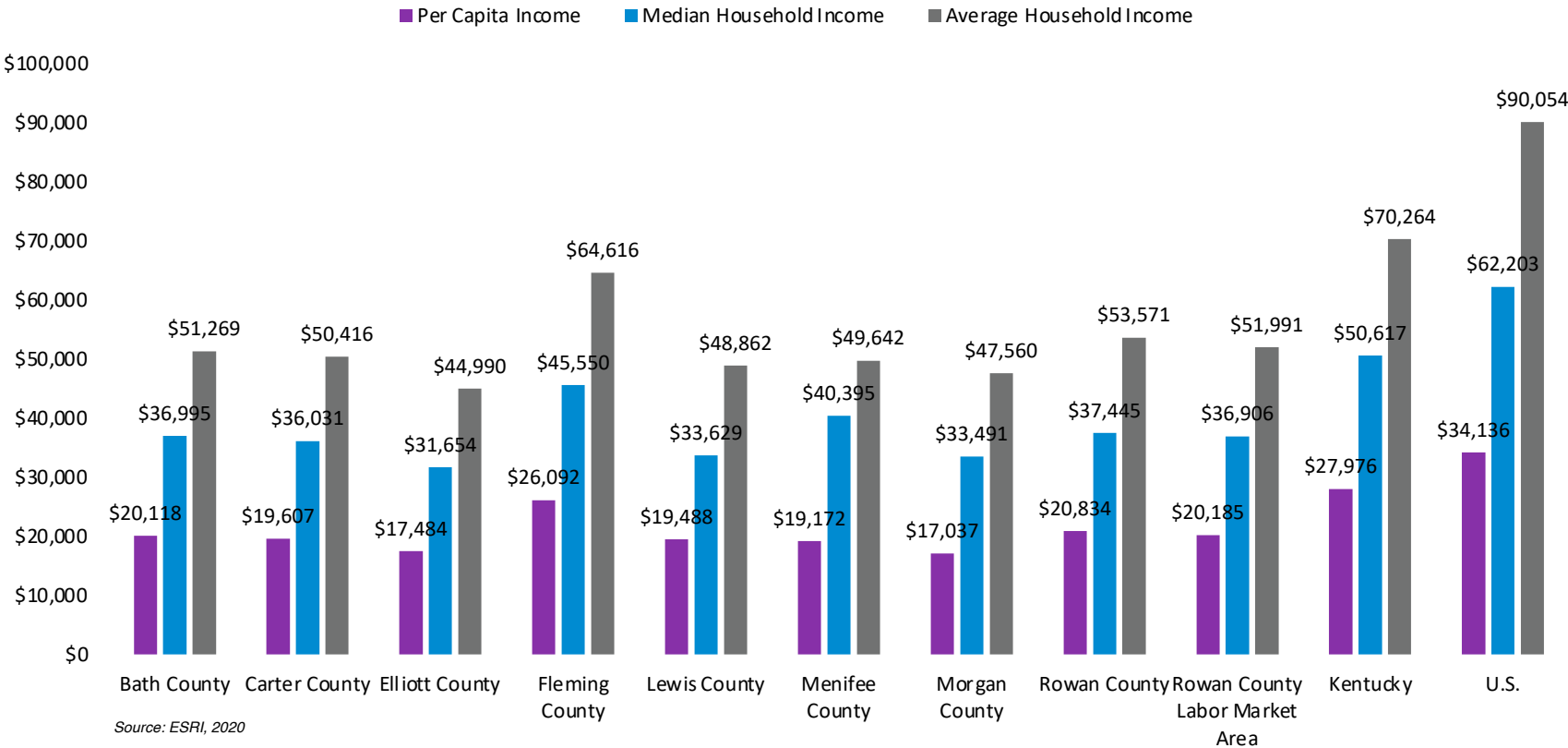
EDUCATIONAL ATTAINMENT

The percentage of the population 25 years and older with an Associate's Degree or higher in the U.S. is 42 percent, which is higher than than for all other geographies. Lewis County has the lowest percentage with an Associate's Degree or higher at 16 percent, followed by Elliott and Meniffee counties at 17 percent. Below is the breakdown for each geography by degree achieved.



INCOME

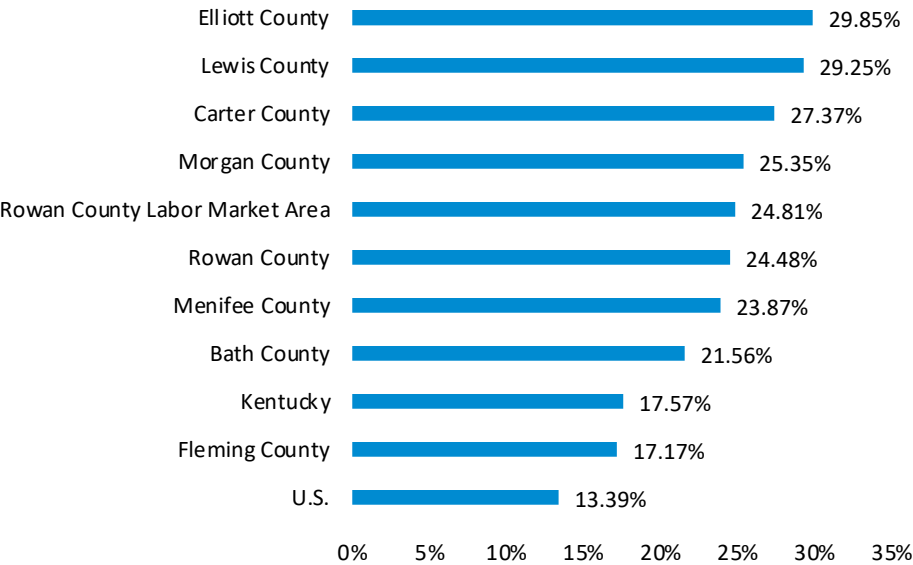
Morgan County has the lowest per capita income measure of those analyzed, and Elliott County has the lowest median and average household income measures. Other than the U.S. and the Commonwealth of Kentucky, Fleming County has the highest income levels.



POVERTY

Of the counties analyzed, Elliott County has the highest percentage of households below the poverty rate at 29.85 percent, and Fleming County has the lowest percentage of households below the poverty rate at 17.17 percent. All geographies are above the U.S. average of 13.39 percent.

Households Below the Poverty Level



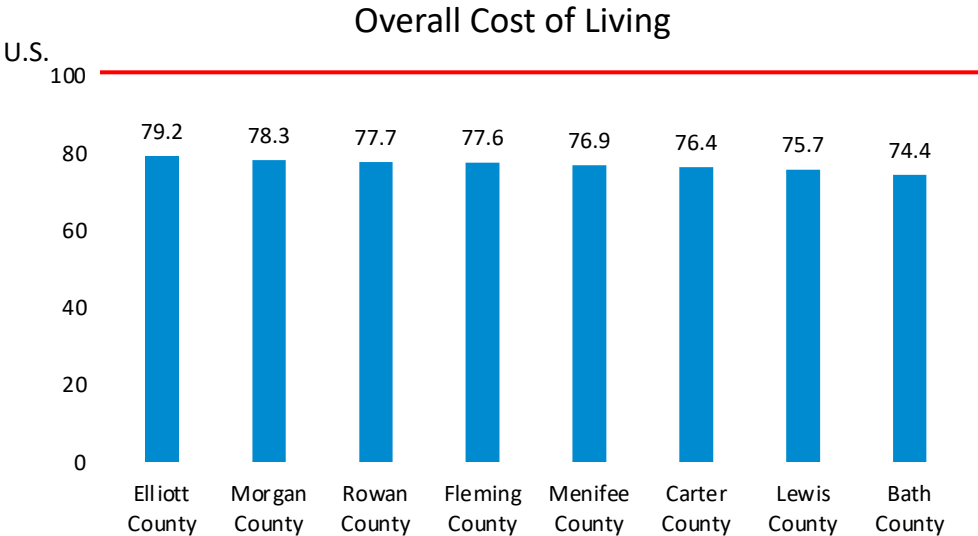
Source: ESRI, 2020

COST OF LIVING

Cost of living data is available at the city, county, state, and MSA levels. Bath County has the lowest overall index for the analyzed geographies, and the Commonwealth of Kentucky has the highest overall index for the analyzed geographies.

	Overall	Grocery	Health	Housing	Utilities	Transportation	Miscellaneous
Bath County	74.4	94.8	91.7	37.8	95.7	83.2	92.6
Carter County	76.4	97	90.1	40.5	93.8	90.1	92.6
Elliott County	79.2	96.3	91.7	35.3	104.1	111.2	88.8
Fleming County	77.6	95	90.4	43.7	94.7	89.5	94.3
Lewis County	75.7	96.5	98.5	33.2	96.4	93	92.3
Meniffee County	76.9	92.3	91.7	37.8	95.6	98.2	92
Morgan County	78.3	96.1	91.7	37.7	97.6	104.7	90.1
Rowan County	77.7	94.1	94.4	50.7	95.6	79.9	91.7
Kentucky	83.6	94.2	93.9	63.3	92.9	89.1	94.3
U.S.	100	100	100	100	100	100	100

Source: Sperling's Best Places



LABOR FORCE

The Rowan County Labor Market Area labor force has decreased by 13 percent since 2012 and now totals more than 43,000. The unemployment rate was at 7.8 percent for December 2020, the most recent month available. The U.S. has the highest overall labor participation rate at 61.3 percent, followed by Fleming County at 58 percent.

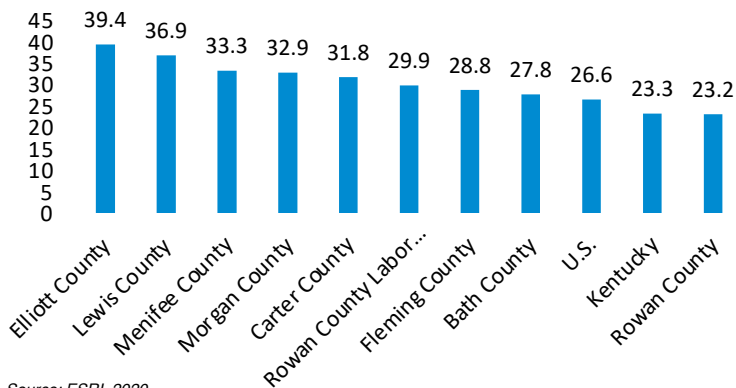
		Rowan County Labor Market Area	Bath County	Carter County	Elliott County	Fleming County	Lewis County	Menifee County	Morgan County	Rowan County	Kentucky	U.S. (#'s in 0000's)
Labor Force	2011	49,857	4,835	11,696	2,331	6,466	5,517	2,543	5,232	11,237	2,056,410	153,617
	2016	44,944	4,759	9,943	2,099	5,945	4,745	2,393	4,486	10,574	2,015,160	159,187
	20-Mar	45,495	4,674	9,927	2,105	6,130	4,707	2,355	4,671	10,926	2,066,706	162,537
	20-Dec	43,349	4,528	9,557	1,983	6,182	4,448	2,267	4,475	9,909	2,007,867	160,017
Employment	2011	43,853	4,224	10,079	1,963	5,779	4,799	4,799	4,656	10,168	1,862,928	139,869
	2016	41,248	4,406	8,888	1,856	5,572	4,275	4,275	4,124	9,942	1,911,978	151,436
	20-Mar	41,778	4,265	9,040	1,874	5,720	4,201	4,201	4,318	10,230	1,956,583	155,167
	20-Dec	40,083	4,215	8,652	1,805	5,820	4,055	4,055	4,172	9,300	1,893,311	149,613
Unemployment Rate	2011	12.6%	12.6%	13.8%	15.8%	10.6%	13.0%	14.1%	11.0%	9.5%	9.4%	8.9%
	2016	8.6%	7.4%	10.6%	11.6%	6.3%	9.9%	8.7%	8.1%	6.0%	5.1%	4.9%
	20-Mar	8.7%	8.8%	8.9%	11.0%	6.7%	10.7%	9.6%	7.6%	6.4%	5.3%	4.5%
	20-Dec	7.8%	6.9%	9.5%	9.0%	5.9%	8.8%	9.0%	6.8%	6.1%	5.7%	6.5%
Labor Force Participation Rate		44.3%	54.7%	42.5%	27.6%	58.0%	42.1%	47.7%	35.5%	52.4%	57.2%	61.3%
Prime Age Labor Participation Rate		58.8%	78.4%	58.0%	30.9%	75.5%	59.4%	69.8%	48.2%	71.6%		

Source: U.S. Bureau of Labor Statistics

COMMUTING

Rowan County has the shortest average commute time to work in minutes at 23.2 minutes, closely followed by the The Commonwealth of Kentucky at 23.3 minutes. Elliott County has the longest average commute time to work in minutes at 39.4 minutes.

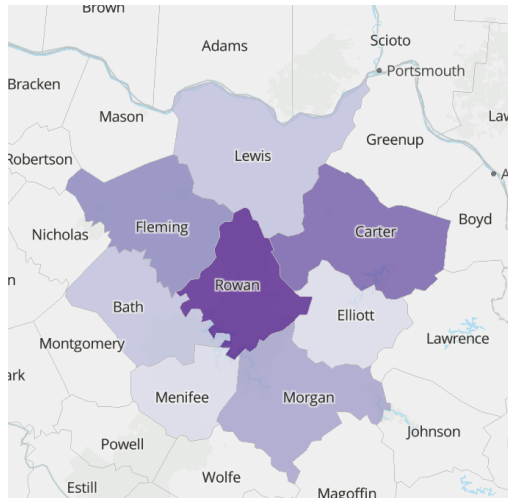
Average Commute to Work for Workers
16+



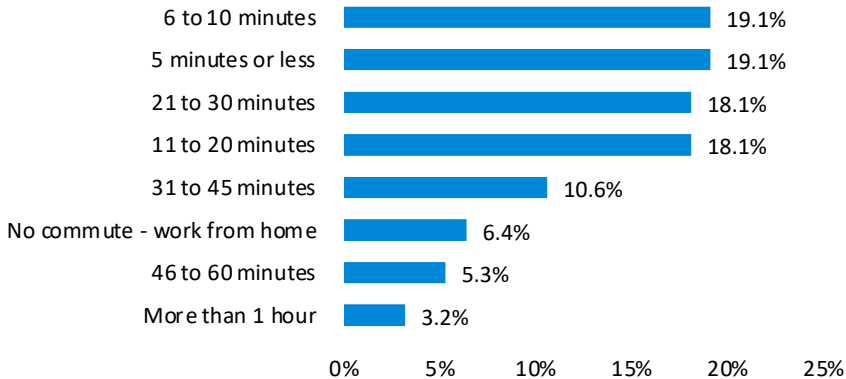
Source: ESRI, 2020

2020 Jobs

11,430
6,628 to 11,429
3,842 to 6,627
3,459 to 3,841
2,440 to 3,458
0 to 2,439



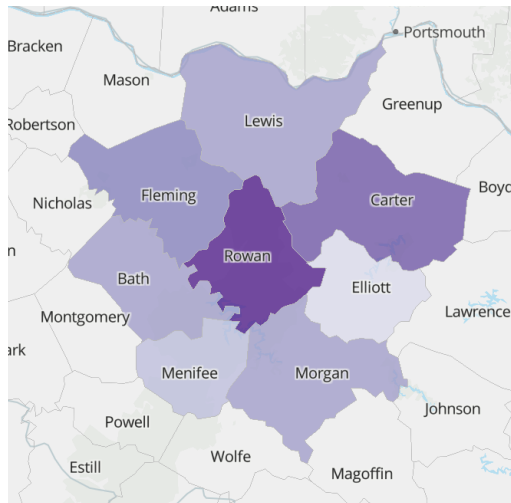
How long is your commute, ONE WAY, to work each day?



Source: Resident Survey, 2020=21

2020 Resident Workers

9,661
9,019 to 9,660
6,788 to 9,018
5,052 to 6,787
2,637 to 5,051
0 to 2,636



ESSENTIAL VS NON-ESSENTIAL DATA

In the wake of COVID-19, emphasis has been placed on essential and non-essential sectors and occupations. As seen in the table directly below, essential jobs make up 54% of total jobs in the Rowan County Labor Market Area, meaning that the 45% non-essential jobs are at risk during a crisis such as COVID-19. The top 10 essential sectors can also be seen below.

	2021 Jobs	Percentage of Jobs
Essential	17,704	54.96%
Non-Essential	14,507	45.04%
Total	32,211	

TOP 10 ESSENTIAL SECTORS

Description	2021 Jobs	2026 Jobs	2021 - 2026 Change	2021 - 2026 % Change	2021 Location Quotient	Avg. Earnings Per Job
Local Government	4,389	4,411	22	0%	1.57	\$45,853
State Government	3,220	3,070	(150)	(5%)	3.01	\$49,513
Hospitals	1,273	1,273	(0)	(0%)	1.25	\$71,845
Nursing and Residential Care Facilities	901	965	64	7%	1.34	\$35,501
Social Assistance	806	914	107	13%	0.88	\$24,867
Food Manufacturing	798	751	(47)	(6%)	2.44	\$51,272
Wood Product Manufacturing	775	822	46	6%	9.29	\$44,046
Credit Intermediation and Related Activities	712	725	14	2%	1.35	\$54,198
Federal Government	657	636	(21)	(3%)	0.69	\$49,261
Gasoline Stations	591	544	(47)	(8%)	3.18	\$22,999
	17,704	17,764	61	0%		\$46,538

Source: EMSI Class of Worker Data 2021.1

ESSENTIAL VS NON-ESSENTIAL DATA

The top 10 non-essential sectors can be seen below.

TOP 10 NON-ESSENTIAL SECTORS

Description	2021 Jobs	2026 Jobs	2021 - 2026 Change	2021 - 2026 % Change	2021 Location Quotient	Avg. Earnings Per Job
Food Services and Drinking Places	2,220	2,377	156	7%	1.01	\$16,711
Ambulatory Health Care Services	1,331	1,451	120	9%	0.83	\$66,594
Administrative and Support Services	1,167	1,322	155	13%	0.62	\$43,905
Specialty Trade Contractors	1,096	1,122	26	2%	0.93	\$42,191
General Merchandise Stores	781	848	67	9%	1.35	\$27,001
Educational Services	723	795	73	10%	0.88	\$20,630
Construction of Buildings	661	684	23	3%	1.51	\$46,896
Motor Vehicle and Parts Dealers	573	611	39	7%	1.43	\$42,650
Religious, Grantmaking, Civic, Professional, and Similar Organizations	504	584	80	16%	0.89	\$24,019
Professional, Scientific, and Technical Services	474	507	32	7%	0.22	\$49,625
	14,507	15,544	1,037	7%		\$39,110

Source: EMSI Class of Worker Data 2021.1

TOP OCCUPATIONS ACROSS SECTORS

Identifying potential current and future skills gaps requires an examination of occupations holistically and at the sector level. A number of occupations in the labor market area are showing skills gaps cross multiple sectors, making it even more important to address those gaps. The table below analyzes the top gap occupations by sector. More detailed information concerning employment, openings demand, and completions by sector is found on the following pages. Note that the Healthcare sector is not included in this table. It does not show demand for any of these sectors that are more commonly found in manufacturing sectors.

	Aerospace- Aviation	Agricultural Technology	Automotive	Distribution- Logistics	Manufacturing Technology	Wood Products
Cutting, Punching, and Press Machine Setters, Operators, and Tenders, Metal and Plastic						
First-Line Supervisors of Production and Operating Workers						
General and Operations Managers						
Heavy and Tractor-Trailer Truck Drivers						
Helpers--Production Workers						
Industrial Machinery Mechanics						
Industrial Truck and Tractor Operators						
Inspectors, Testers, Sorters, Samplers, and Weighers						
Laborers and Freight, Stock, and Material Movers, Hand						
Maintenance and Repair Workers, General						
Miscellaneous Assemblers and Fabricators						
Multiple Machine Tool Setters, Operators, and Tenders, Metal and Plastic						
Packaging and Filling Machine Operators and Tenders						
Packers and Packers, Hand						
Welders, Cutters, Solderers, and Brazers						

SECTOR DATA BY GEOGRAPHY

The table below shows the sector data by geography. For each sector and geography, the 2021 jobs, projected job changed from 2021 - 2026 and the earnings can be seen. The following pages provide additional detail on each sector.

	Aerospace-Aviation	Agricultural Technology	Automotive	Distribution-Logistics	Healthcare	Manufacturing Technology	Wood Products
Rowan County, KY	0 Jobs 0% Change \$0 Earnings	264 Jobs 14% Change \$54,634 Earnings	134 Jobs -9% Change \$61,609 Earnings	287 Jobs -10% Change \$50,894 Earnings	2,240 Jobs 3% Change \$60,493 Earnings	205 Jobs -16% Change \$48,141 Earnings	373 Jobs 4% Change \$49,203 Earnings
Rowan County Labor Market Area	<10 Jobs Insf. % Change Insf. Earnings	1,176 Jobs -2% Change \$46,612 Earnings	400 Jobs -3% Change \$54,808 Earnings	650 Jobs -8% Change \$55,621 Earnings	4,602 Jobs 6% Change \$53,689 Earnings	1,131 Jobs 5% Change \$51,490 Earnings	775 Jobs 6% Change \$44,046 Earnings
Kentucky	6,636 Jobs 12% Change \$94,393 Earnings	73,473 Jobs 3% Change \$55,623 Earnings	56,914 Jobs 2% Change \$80,656 Earnings	114,640 Jobs 5% Change \$65,971 Earnings	290,940 Jobs 7% Change \$62,571 Earnings	104,882 Jobs 3% Change \$81,055 Earnings	\$19,763 Jobs -0.2% Change \$64,844 Earnings
United States	810,348 Jobs 3% Change \$123,026 Earnings	4,176,852 Jobs 2% Change \$56,789 Earnings	868,202 Jobs 3% Change \$81,175 Earnings	5,170,054 Jobs 6% Change \$65,490 Earnings	23,175,793 Jobs 8% Change \$64,858 Earnings	6,094,792 Jobs 1% Change \$92,634 Earnings	791,671 Jobs -1% Change \$69,830 Earnings

Source: EMSI Class of Worker Data 2021.1

AEROSPACE/AVIATION

INDUSTRY JOBS & EARNINGS

Employment in the aerospace-aviation sector is currently less than 10 jobs for the Rowan County Labor Market Area, with that number projected to remain the same through 2026.

	Jobs (2021)	Jobs (2026)	Job Change %	Earnings (2020)
United States	810,348	833,190	3%	\$123,027
Kentucky	6,636	7,449	12%	\$94,393
Rowan County Labor Market Area	<10	<10	Insf. Data	Insf. Data
Rowan County, KY	0	0	0%	\$0

Source: EMSI Class of Worker Data 2021.1

INDUSTRY INITIATIVES

While the Rowan County region does not currently have a significant base of Aerospace/Aviation employers, the area does offer a number of assets for the industry and is working to further develop the sector.

- Multiple available sites appropriate for Aviation/Aerospace companies, including business and aviation park adjacent to the new Morehead-Rowan County Clyde A. Thomas Airport.
- A strategic plan objective to develop a growth plan for the Morehead-Rowan County airport to attract businesses that utilize this asset.
- The strategic plan also calls for creating sector strategies for Aerospace/Aviation, to include maximizing research assets such as the Morehead State University's Space Science Center

COMPATIBLE OCCUPATIONS DATA

A list of occupations that are directly compatible with key aviation occupations has been identified. The following data provides a summary of those occupations in the Rowan County Labor Market Area. Additional detail is found in the table on the following page.

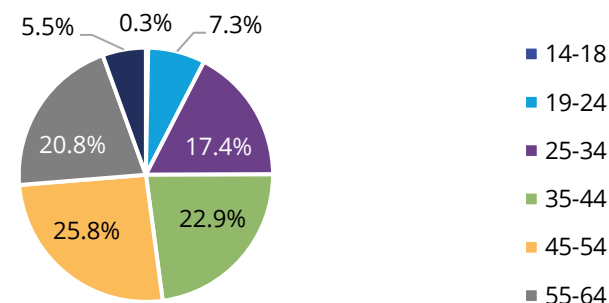
COMPATIBLE OCCUPATION SNAPSHOT

1,326 Jobs (2020) 20% Above US Average	+3.7% % Change (2020 – 2025) Nation: 3.1%	\$16.14/hr Median Earnings Nation: \$21.16/hr
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Regional Occupational Employment Trends

	2021 Jobs	2026 Jobs	% Change
Rowan County	392	409	4.4%
Rowan County Labor Market Area	1,326	1,375	3.7%
Kentucky	83,712	85,787	2.5%
United States	5,642,508	5,818,600	3.1%

Age of Compatible Occupations Workers



AEROSPACE-AVIATION COMPATIBLE OCCUPATIONS

The table below shows the top occupations identified as compatible with key aviation occupations in the Rowan County Labor Market Area. This table represents the top 15 compatible occupations based on the Compatibility Index score, with that Index ranging from a score of 92 to 89 for these occupations.

Description	OVERALL OCCUPATION									
	2021 Jobs	2026 Jobs	2021 - 2026 % Change	2020 Location Quotient	Avg. Hourly Earnings	Avg. Annual Openings	Regional Completions (2019)	Compatibility Index	Typical Entry Level Education	Automation Index
Telecommunications Equipment Installers and Repairers, Except Line Installers	58	63	9%	1.30	\$24.80	9	0	92	Postsecondary nondegree award	105.1
Heating, Air Conditioning, and Refrigeration Mechanics and Installers	48	48	(0%)	0.62	\$18.86	5	0	92	Postsecondary nondegree award	113.0
Automotive Service Technicians and Mechanics	225	230	2%	1.44	\$15.15	24	0	91	Postsecondary nondegree award	105.9
Bus and Truck Mechanics and Diesel Engine Specialists	62	66	5%	1.07	\$17.78	7	0	91	High school diploma or equivalent	114.6
Installation, Maintenance, and Repair Workers, All Other	27	29	7%	0.65	\$20.25	4	0	91	High school diploma or equivalent	110.6
Computer Network Support Specialists	25	27	5%	0.62	\$22.86	2	0	91	Associate's degree	86.9
Maintenance and Repair Workers, General	422	441	4%	1.32	\$16.82	46	0	90	High school diploma or equivalent	109.6
Computer User Support Specialists	75	82	9%	0.50	\$20.79	8	0	90	Some college, no degree	82.9
Multiple Machine Tool Setters, Operators, and Tenders, Metal and Plastic	41	45	10%	1.33	\$15.69	5	0	90	High school diploma or equivalent	119.1
Farm Equipment Mechanics and Service Technicians	32	37	14%	3.92	\$16.22	4	0	90	High school diploma or equivalent	111.3
Outdoor Power Equipment and Other Small Engine Mechanics	27	29	6%	3.86	\$12.99	3	0	90	High school diploma or equivalent	115.8
Tool and Die Makers	26	27	1%	1.85	\$20.20	3	0	90	Postsecondary nondegree award	120.2
Inspectors, Testers, Sorters, Samplers, and Weighers	142	137	(3%)	1.22	\$17.43	18	0	89	High school diploma or equivalent	106.1
Water and Wastewater Treatment Plant and System Operators	68	69	2%	2.80	\$16.24	7	0	89	High school diploma or equivalent	104.1
Electrical Power-Line Installers and Repairers	46	46	(1%)	2.00	\$30.18	4	0	89	High school diploma or equivalent	114.0
	1,326	1,375	4%		\$17.83	148				

Source: EMSI Class of Worker Data 2021.1

AGRICULTURAL TECHNOLOGY

INDUSTRY JOBS & EARNINGS

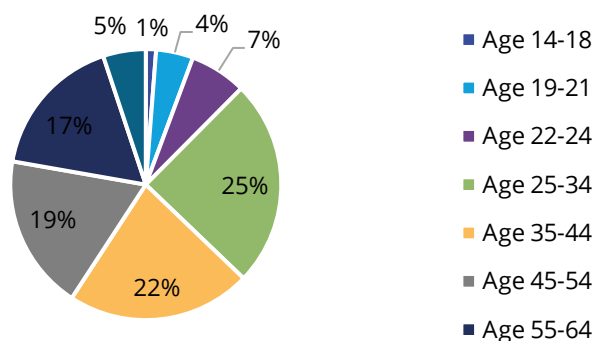
Employment in the agricultural technology sector currently totals more than 1,170 for the Rowan County Labor Market Area, with that number projected to decrease slightly to approximately 1,150 jobs by 2026.

	Jobs (2021)	Jobs (2026)	Job Change %	Earnings (2020)
United States	4,176,852	4,272,179	2%	\$56,789
Kentucky	73,473	75,454	3%	\$55,623
Rowan County Labor Market Area	1,176	1,156	(2%)	\$46,612
Rowan County, KY	264	300	14%	\$54,634

INDUSTRY AGE

The chart below shows the age breakdown of workers in the agricultural technology sector. Workers 55 and older make up 22% of the industry workforce.

Age of Industry Workers

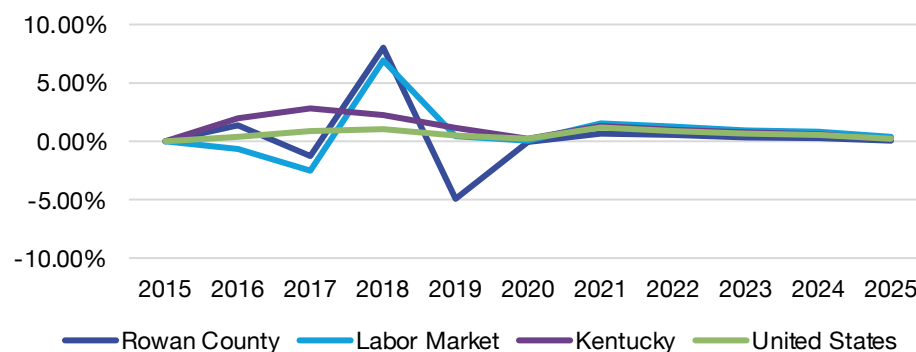


OCCUPATION SNAPSHOT

5,897 Jobs (2020) 7% Above US Average	+5.0% % Change (2020 – 2025) Nation: 3.5%	\$13.95/hr Median Earnings Nation: \$16.31/hr
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County	Jobs	Res Workers	Net Commuters
Rowan	1,963	1,700	263
Carter	1,397	1,687	(290)
Fleming	699	1,406	(706)
Morgan	626	1,152	(526)
Lewis	510	916	(406)
Bath	417	1,041	(623)
Menifee	187	565	(378)
Elliott	99	270	(171)

Job Change Agricultural Technology



Source: EMSI Class of Worker Data 2021.1

AGRICULTURAL TECHNOLOGY TOP 15 OCCUPATIONS

The table below shows the top occupations for the agricultural technology sector for the Rowan County Labor Market Area. Occupation data can be seen for employment in the agricultural technology sector and for the overall occupation regardless of sector. The data is sorted by overall 2021 jobs.

Description	EMPLOYED IN INDUSTRY			OVERALL OCCUPATION								
	2021 Jobs	2026 Jobs	% Change	2021 Jobs	2021 - 2026 Change	2021 - 2026 % Change	2020 Location Quotient	Avg. Hourly Earnings	Avg. Annual Openings	Regional Completions (2019)	Typical Entry Level Education	Automation Index
Laborers and Freight, Stock, and Material Movers, Hand	72	68	(6%)	541	16	3%	0.90	\$13.40	71	0	No formal educational credential	117.2
Heavy and Tractor-Trailer Truck Drivers	24	25	7%	468	9	2%	1.11	\$21.67	52	0	Postsecondary nondegree award	110.1
Maintenance and Repair Workers, General	28	25	(9%)	391	14	4%	1.29	\$16.90	37	0	High school diploma or equivalent	109.6
Helpers--Production Workers	63	44	(29%)	200	(4)	(2%)	3.38	\$13.94	27	0	High school diploma or equivalent	120.0
First-Line Supervisors of Production and Operating Workers	31	30	(6%)	183	8	4%	1.48	\$25.34	18	0	High school diploma or equivalent	88.6
Farmworkers and Laborers, Crop, Nursery, and Greenhouse	127	134	5%	138	8	6%	1.02	\$12.25	22	0	No formal educational credential	113.0
Inspectors, Testers, Sorters, Samplers, and Weighers	23	20	(13%)	134	(6)	(4%)	1.20	\$17.34	14	0	High school diploma or equivalent	106.1
Packaging and Filling Machine Operators and Tenders	82	81	(1%)	130	1	1%	1.67	\$16.46	14	0	High school diploma or equivalent	116.9
Industrial Machinery Mechanics	24	24	2%	129	13	10%	1.61	\$23.88	13	0	High school diploma or equivalent	109.8
Packers and Packagers, Hand	36	35	(3%)	126	(2)	(2%)	1.00	\$13.47	16	0	No formal educational credential	123.1
Food Processing Workers, All Other	82	71	(14%)	98	(10)	(10%)	10.84	\$12.91	9	0	No formal educational credential	117.6
Bakers	59	69	16%	87	9	11%	2.29	\$12.14	13	0	No formal educational credential	121.9
Meat, Poultry, and Fish Cutters and Trimmers	75	62	(17%)	79	(13)	(17%)	2.53	\$14.65	8	0	No formal educational credential	118.3
Farm Equipment Mechanics and Service Technicians	26	30	14%	31	4	13%	3.88	\$16.23	4	0	High school diploma or equivalent	111.3
Farmers, Ranchers, and Other Agricultural Managers	24	23	(6%)	27	(1)	(5%)	0.26	\$26.89	3	0	High school diploma or equivalent	93.5
				2,763	45	2%		\$17.04	323			

Source: EMSI Class of Worker Data 2021.1

AUTOMOTIVE

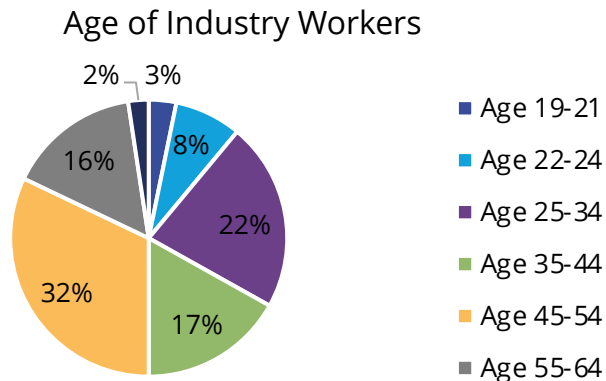
INDUSTRY JOBS & EARNINGS

Employment in the automotive sector is approximately 400 for the Rowan County Labor Market Area, with that number projected to decrease slightly to approximately 389 jobs by 2026.

	Jobs (2021)	Jobs (2026)	Job Change %	Earnings (2020)
United States	868,203	891,144	3%	\$81,175
Kentucky	56,914	58,224	2%	\$80,656
Rowan County Labor Market Area	400	389	(3%)	\$54,808
Rowan County, KY	134	122	(9%)	\$61,609

INDUSTRY AGE

The chart below shows the age breakdown of workers in the automotive sector. Workers 55 and older make up 18% of the industry workforce.



OCCUPATION SNAPSHOT

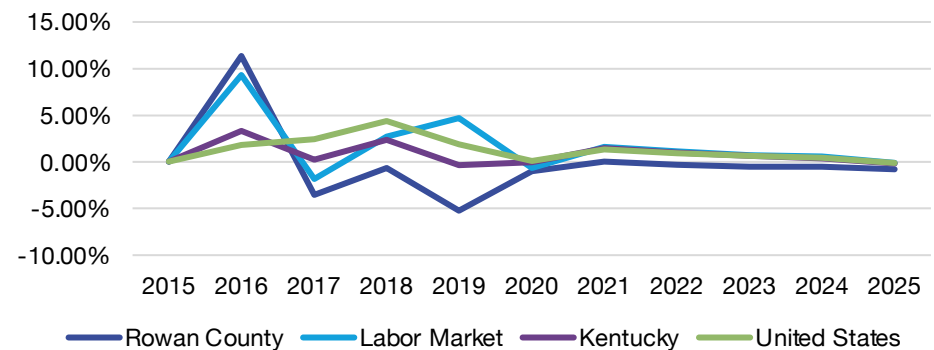
1,809
Jobs (2020)
20% Above
US Average

+4.0%
% Change
(2020 – 2025)
Nation: 3.3%

\$15.50/hr
Median Earnings
Nation:
\$17.31/hr

County	Jobs	Res Workers	Net Commuters
Rowan	654	642	12
Carter	355	651	(296)
Fleming	323	506	(183)
Morgan	142	302	(160)
Lewis	136	444	(308)
Bath	118	527	(408)
Menifee	74	274	(201)
Elliott	<10	78	Insf. Data

Job Change Automotive



Source: EMSI Class of Worker Data 2021.1

AUTOMOTIVE TOP 15 OCCUPATIONS

The table below shows the top occupations for the automotive sector for the Rowan County Labor Market Area. Occupation data can be seen for employment in the automotive sector and for the overall occupation regardless of sector. The data is sorted by overall 2021 jobs.

Description	EMPLOYED IN INDUSTRY			OVERALL OCCUPATION								
	2021 Jobs	2026 Jobs	% Change	2021 Jobs	2021 - 2026 Change	2021 - 2026 % Change	2020 Location Quotient	Avg. Hourly Earnings	Avg. Annual Openings	Regional Completions (2019)	Typical Entry Level Education	Automation Index
Laborers and Freight, Stock, and Material Movers, Hand	14	14	(0%)	541	16	3%	0.90	\$13.40	71	0	No formal educational credential	117.2
Miscellaneous Assemblers and Fabricators	117	108	(7%)	415	(14)	(3%)	1.61	\$13.87	40	0	High school diploma or equivalent	112.6
First-Line Supervisors of Production and Operating Workers	15	15	0%	183	8	4%	1.48	\$25.34	18	0	High school diploma or equivalent	88.6
Inspectors, Testers, Sorters, Samplers, and Weighers	17	15	(9%)	134	(6)	(4%)	1.20	\$17.34	14	0	High school diploma or equivalent	106.1
Industrial Machinery Mechanics	11	11	7%	129	13	10%	1.61	\$23.88	13	0	High school diploma or equivalent	109.8
Welders, Cutters, Solderers, and Brazers	10	10	(0%)	93	4	4%	1.08	\$18.82	10	0	High school diploma or equivalent	121.4
Cutting, Punching, and Press Machine Setters, Operators, and Tenders, Metal and Plastic	33	31	(6%)	84	(5)	(6%)	2.29	\$15.20	8	0	High school diploma or equivalent	115.9
Industrial Engineers	11	11	6%	44	5	10%	0.75	\$32.96	4	0	Bachelor's degree	92.0
Multiple Machine Tool Setters, Operators, and Tenders, Metal and Plastic	12	12	1%	38	3	7%	1.31	\$15.79	4	0	High school diploma or equivalent	119.1
Mixing and Blending Machine Setters, Operators, and Tenders	<10	<10	1%	21	2	9%	0.85	\$16.97	3	0	High school diploma or equivalent	117.1
Cutting and Slicing Machine Setters, Operators, and Tenders	<10	<10	3%	21	(0)	(1%)	1.86	\$17.28	2	0	High school diploma or equivalent	116.6
Industrial Engineering Technologists and Technicians	<10	<10	(1%)	10	0	3%	0.78	\$22.74	1	86	Associate's degree	94.0
Calibration Technologists and Technicians and Engineering Technologists and Technicians, Except Drafters, All Other	<10	<10	(0%)	10	0	3%	0.55	\$20.14	1	63	Associate's degree	92.1
Mechanical Drafters	<10	<10	(2%)	<10	Insf. Data	Insf. Data	0.26	Insf. Data	0	0	Associate's degree	84.6
Electrical and Electronic Engineering Technologists and Technicians	<10	<10	(1%)	<10	Insf. Data	Insf. Data	0.39	Insf. Data	1	56	Associate's degree	98.6
				1,736	26	2%		\$16.96	192			

Source: EMSI Class of Worker Data 2021.1

DISTRIBUTION/LOGISTICS

INDUSTRY JOBS & EARNINGS

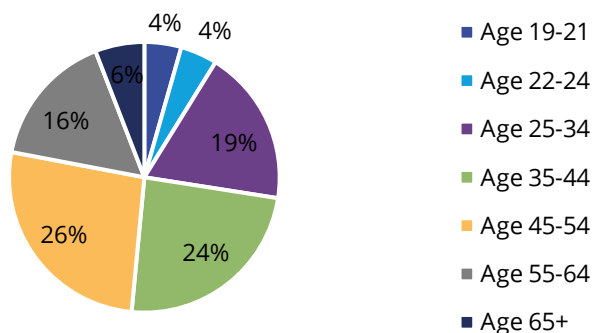
Employment in the distribution-logistics sector is approximately 650 for the Rowan County Labor Market Area, with that number projected to decrease slightly to approximately 600 jobs by 2026.

	Jobs (2021)	Jobs (2026)	Job Change %	Earnings (2020)
United States	5,170,054	5,490,284	6%	\$65,490
Kentucky	114,640	119,987	5%	\$65,971
Rowan County Labor Market Area	650	600	(8%)	\$55,621
Rowan County, KY	287	259	(10%)	\$50,894

INDUSTRY AGE

The chart below shows the age breakdown of workers in the distribution-logistics sector. Workers 55 and older make up 22% of the industry workforce.

Age of Industry Workers

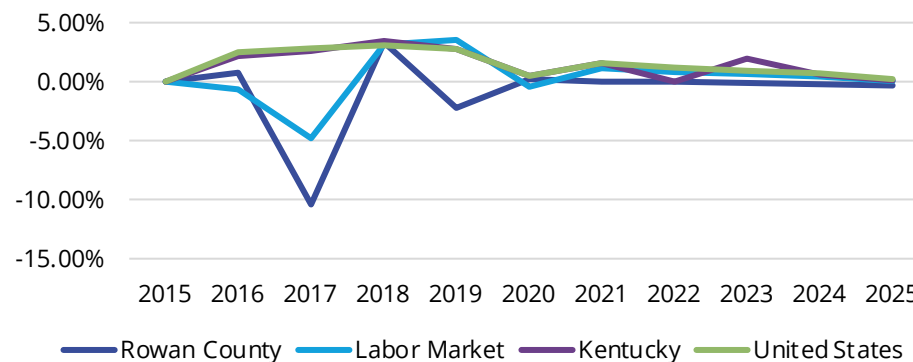


OCCUPATION SNAPSHOT

2,586 Jobs (2020) 2% Above US Average	+3.1% % Change (2020 – 2025) Nation: 4.7%	\$14.65/hr Median Earnings Nation: \$16.54/hr
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County	Jobs	Res Workers	Net Commuters
Rowan	895	799	96
Carter	549	762	(213)
Fleming	314	674	(360)
Morgan	252	451	(200)
Lewis	224	546	(322)
Bath	223	522	(299)
Menifee	81	279	(198)
Elliott	49	130	(81)

Job Change Distribution/Logistics



Source: EMSI Class of Worker Data 2021.1

DISTRIBUTION/LOGISTICS TOP 15 OCCUPATIONS

The table below shows the top occupations for the distribution-logistics sector for the Rowan County Labor Market Area. Occupation data can be seen for employment in the distribution-logistics sector and for the overall occupation regardless of sector. The data is sorted by overall 2021 jobs.

Description	EMPLOYED IN INDUSTRY			OVERALL OCCUPATION								
	2021 Jobs	2026 Jobs	% Change	2021 Jobs	2021 - 2026 Change	2021 - 2026 % Change	2020 Location Quotient	Avg. Hourly Earnings	Avg. Annual Openings	Regional Completions (2019)	Typical Entry Level Education	Automation Index
Heavy and Tractor-Trailer Truck Drivers	236	225	(5%)	541	16	3%	0.90	\$13.40	71	0	No formal educational credential	117.2
Laborers and Freight, Stock, and Material Movers, Hand	88	82	(7%)	468	9	2%	1.11	\$21.67	52	0	Postsecondary nondegree award	110.1
Industrial Truck and Tractor Operators	63	55	(13%)	391	14	4%	1.29	\$16.90	37	0	High school diploma or equivalent	109.6
Light Truck Drivers	28	29	3%	362	2	0%	0.86	\$11.47	45	0	High school diploma or equivalent	112.3
Stockers and Order Fillers	22	19	(12%)	179	(1)	(0%)	1.38	\$18.05	19	0	No formal educational credential	119.5
First-Line Supervisors of Transportation and Material Moving Workers, Except Aircraft Cargo Handling Supervisors	17	16	(7%)	165	12	7%	0.82	\$16.33	20	0	High school diploma or equivalent	112.9
Railroad Conductors and Yardmasters	11	<10	(27%)	134	(6)	(4%)	1.20	\$17.34	14	0	High school diploma or equivalent	106.1
Driver/Sales Workers	<10	<10	(0%)	130	1	1%	1.67	\$16.46	14	0	High school diploma or equivalent	116.9
Maintenance and Repair Workers, General	<10	<10	(8%)	69	3	4%	0.75	\$21.11	7	0	High school diploma or equivalent	93.8
Transit and Railroad Police	<10	0	(26%)	59	7	11%	0.66	\$11.46	8	0	High school diploma or equivalent	109.1
Inspectors, Testers, Sorters, Samplers, and Weighers	<10	<10	(16%)	13	0	1%	0.49	\$127.93	1	0	Bachelor's degree	91.5
Airline Pilots, Copilots, and Flight Engineers	<10	0	(24%)	12	1	5%	0.45	\$18.93	1	0	High school diploma or equivalent	117.7
Signal and Track Switch Repairers	<10	<10	(27%)	12	Insf. Data	Insf. Data	1.45	\$21.68	1	0	High school diploma or equivalent	98.1
Packaging and Filling Machine Operators and Tenders	<10	<10	(4%)	<10	Insf. Data	Insf. Data	0.98	Insf. Data	0	0	High school diploma or equivalent	92.2
Sheet Metal Workers	<10	<10	(26%)	<10	Insf. Data	Insf. Data	1.60	Insf. Data	0	0	High school diploma or equivalent	110.0
				2,540	54	2%		\$16.94	291			

Source: EMSI Class of Worker Data 2021.1

HEALTHCARE

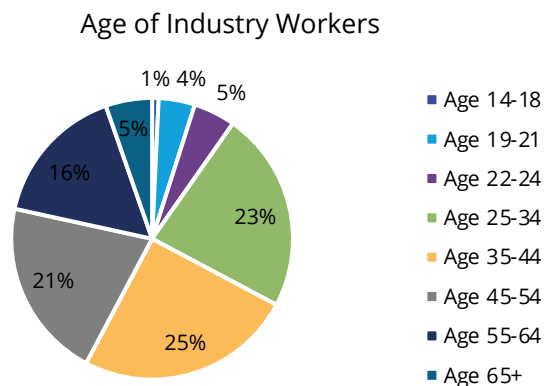
INDUSTRY JOBS & EARNINGS

Employment in the healthcare sector is approximately 4,600 for the Rowan County Labor Market Area, with that number projected to increase to approximately 4,800 jobs by 2026.

	Jobs (2021)	Jobs (2026)	Job Change %	Earnings (2020)
United States	23,175,793	25,027,192	8%	\$64,858
Kentucky	290,940	310,456	7%	\$62,571
Rowan County Labor Market Area	4,602	4,880	6%	\$53,689
Rowan County, KY	2,240	2,309	3%	\$60,493

INDUSTRY AGE

The chart below shows the age breakdown of workers in the healthcare sector. Workers 55 and older make up 22% of the industry workforce.



OCCUPATION SNAPSHOT

13,653

Jobs (2020)
13% Above
US Average

+4.3%

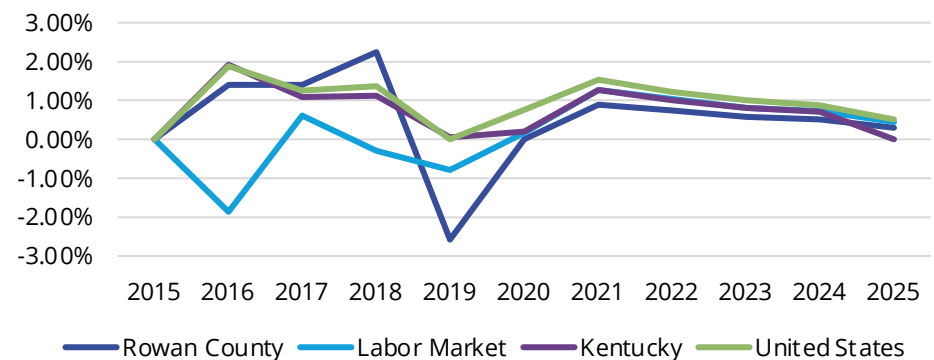
% Change
(2020 – 2025)
Nation: 5.2%

\$12.76/hr

Median Earnings
Nation:
\$16.21/hr

County	Jobs	Res Workers	Net Commuters
Rowan	5,469	4,168	1,302
Carter	2,667	3,876	(1,209)
Fleming	1,384	2,727	(1,344)
Morgan	1,329	2,083	(753)
Lewis	926	2,077	(1,151)
Bath	873	1,989	(1,116)
Menifee	553	1,086	(533)
Elliott	452	655	(203)

Job Change Healthcare



Source: EMSI Class of Worker Data 2021.1

HEALTHCARE TOP 15 OCCUPATIONS

The table below shows the top occupations for the healthcare sector for the Rowan County Labor Market Area. Occupation data can be seen for employment in the healthcare sector and for the overall occupation regardless of sector. The data is sorted by overall 2021 jobs.

Description	EMPLOYED IN INDUSTRY			OVERALL OCCUPATION								
	2021 Jobs	2026 Jobs	% Change	2021 Jobs	2021 - 2026 Change	2021 - 2026 % Change	2020 Location Quotient	Avg. Hourly Earnings	Avg. Annual Openings	Regional Completions (2019)	Typical Entry Level Education	Automation Index
Home Health and Personal Care Aides	568	662	17%	652	96	15%	0.84	\$11.17	113	0	High school diploma or equivalent	93.6
Registered Nurses	475	480	1%	554	6	1%	0.91	\$31.46	29	165	Bachelor's degree	85.3
Nursing Assistants	327	322	(2%)	359	(5)	(1%)	1.22	\$11.76	39	0	Postsecondary nondegree award	97.0
Childcare Workers	122	118	(3%)	281	(7)	(2%)	1.02	\$9.66	41	0	High school diploma or equivalent	88.0
Maids and Housekeeping Cleaners	74	74	(0%)	271	1	0%	0.84	\$10.89	36	0	No formal educational credential	124.5
Cooks, Institution and Cafeteria	70	70	0%	256	5	2%	3.12	\$11.06	35	0	No formal educational credential	108.3
Receptionists and Information Clerks	116	122	5%	229	11	5%	1.08	\$11.79	31	0	High school diploma or equivalent	94.2
Licensed Practical and Licensed Vocational Nurses	166	164	(1%)	198	(2)	(1%)	1.37	\$19.01	15	0	Postsecondary nondegree award	84.8
Pharmacy Technicians	152	149	(2%)	183	(3)	(2%)	2.22	\$13.55	14	0	High school diploma or equivalent	109.9
Social and Human Service Assistants	72	83	16%	159	20	13%	1.85	\$13.12	22	0	High school diploma or equivalent	89.4
Medical Assistants	138	152	10%	151	14	9%	1.02	\$14.63	19	0	Postsecondary nondegree award	97.3
Medical and Health Services Managers	85	93	10%	102	10	10%	1.17	\$38.21	10	38	Bachelor's degree	75.2
Substance Abuse, Behavioral Disorder, and Mental Health Counselors	84	91	9%	98	8	8%	1.53	\$21.73	11	0	Bachelor's degree	84.9
Medical Secretaries and Administrative Assistants	76	79	4%	89	4	4%	0.74	\$14.49	10	0	High school diploma or equivalent	93.1
Nurse Practitioners	74	90	22%	83	16	19%	1.84	\$50.08	8	0	Master's degree	83.2
				3,668	174	5%		\$17.02	433			

Source: EMSI Class of Worker Data 2021.1

MANUFACTURING TECHNOLOGY

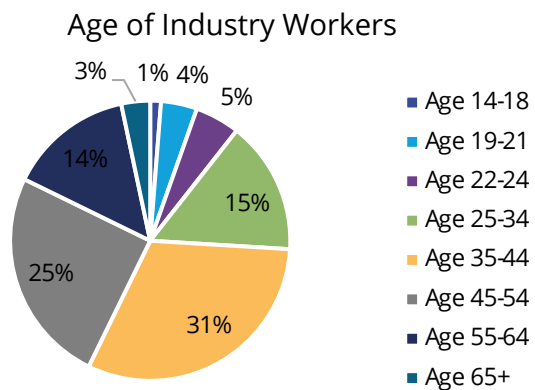
INDUSTRY JOBS & EARNINGS

Employment in the manufacturing technology sector is approximately 1,100 for the Rowan County Labor Market Area, with that number projected to increase to nearly 1,200 jobs by 2026.

	Jobs (2021)	Jobs (2026)	Job Change %	Earnings (2020)
United States	6,094,792	6,153,826	1%	\$92,634
Kentucky	104,882	108,048	3%	\$81,055
Rowan County Labor Market Area	1,131	1,189	5%	\$51,490
Rowan County, KY	205	172	(16%)	\$48,141

INDUSTRY AGE

The chart below shows the age breakdown of workers in the manufacturing technology sector. Workers 55 and older make up 18% of the industry workforce.



OCCUPATION SNAPSHOT

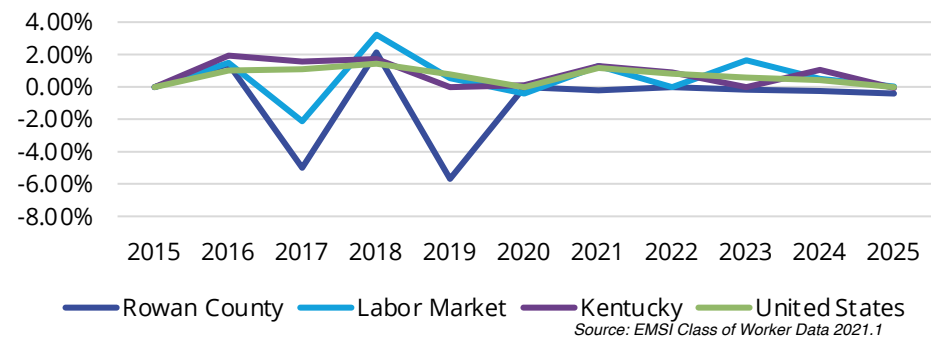
6,525
Jobs (2020)
6% Above
US Average

+3.5%
% Change
(2020 – 2025)
Nation: 3.0%

\$15.86/hr
Median Earnings
Nation:
\$19.02/hr

County	Jobs	Res Workers	Net Commuters
Rowan	2,254	2,040	214
Carter	1,501	1,870	(370)
Fleming	870	1,713	(843)
Morgan	654	1,129	(475)
Lewis	463	1,248	(785)
Bath	453	1,392	(939)
Menifee	224	727	(503)
Elliott	106	303	(197)

Job Change for Manufacturing Technology



MANUFACTURING TECHNOLOGY TOP 15 OCCUPATIONS

The table below shows the top occupations for the manufacturing technology sector for the Rowan County Labor Market Area. Occupation data can be seen for employment in the manufacturing technology sector and for the overall occupation regardless of sector. The data is sorted by overall 2021 jobs.

Description	EMPLOYED IN INDUSTRY			OVERALL OCCUPATION								
	2021 Jobs	2026 Jobs	% Change	2021 Jobs	2021 - 2026 Change	2021 - 2026 % Change	2020 Location Quotient	Avg. Hourly Earnings	Avg. Annual Openings	Regional Completions (2019)	Typical Entry Level Education	Automation Index
Laborers and Freight, Stock, and Material Movers, Hand	41	45	8%	541	16	3%	0.90	\$13.40	71	0	No formal educational credential	117.2
Heavy and Tractor-Trailer Truck Drivers	36	37	2%	468	9	2%	1.11	\$21.67	52	0	Postsecondary nondegree award	110.1
General and Operations Managers	27	29	7%	465	35	8%	0.95	\$35.15	43	160	Bachelor's degree	82.2
Miscellaneous Assemblers and Fabricators	86	78	(9%)	415	(14)	(3%)	1.61	\$13.87	40	0	High school diploma or equivalent	112.6
Maintenance and Repair Workers, General	37	41	9%	391	14	4%	1.29	\$16.90	37	0	High school diploma or equivalent	109.6
Helpers--Production Workers	59	64	10%	200	(4)	(2%)	3.38	\$13.94	27	0	High school diploma or equivalent	120.0
First-Line Supervisors of Production and Operating Workers	63	68	7%	183	8	4%	1.48	\$25.34	18	0	High school diploma or equivalent	88.6
Inspectors, Testers, Sorters, Samplers, and Weighers	40	40	(2%)	134	(6)	(4%)	1.20	\$17.34	14	0	High school diploma or equivalent	106.1
Industrial Machinery Mechanics	35	40	15%	129	13	10%	1.61	\$23.88	13	0	High school diploma or equivalent	109.8
Packers and Packagers, Hand	27	30	10%	126	(2)	(2%)	1.00	\$13.47	16	0	No formal educational credential	123.1
Shipping, Receiving, and Inventory Clerks	24	25	5%	105	0	0%	0.76	\$15.71	10	0	High school diploma or equivalent	109.1
Welders, Cutters, Solderers, and Brazers	39	40	2%	93	4	4%	1.08	\$18.82	10	0	High school diploma or equivalent	121.4
Cutting, Punching, and Press Machine Setters, Operators, and Tenders, Metal and Plastic	38	33	(11%)	84	(5)	(6%)	2.29	\$15.20	8	0	High school diploma or equivalent	115.9
Molding, Coremaking, and Casting Machine Setters, Operators, and Tenders, Metal and Plastic	32	33	4%	41	1	3%	1.30	\$14.00	5	0	High school diploma or equivalent	117.0
Multiple Machine Tool Setters, Operators, and Tenders, Metal and Plastic	23	26	10%	38	3	7%	1.31	\$15.79	4	0	High school diploma or equivalent	119.1
				3,413	71	2%		\$19.32	370			

Source: EMSI Class of Worker Data 2021.1

WOOD PRODUCTS

INDUSTRY JOBS & EARNINGS

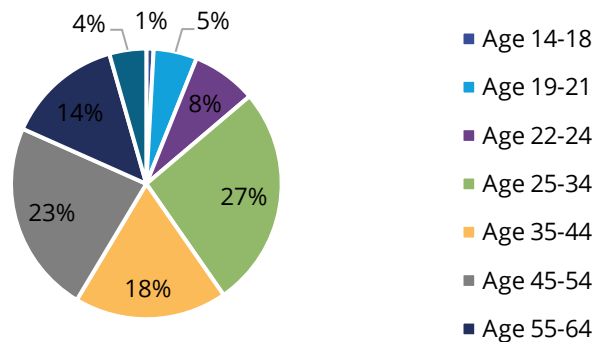
Employment in the wood products sector is approximately 775 for the Rowan County Labor Market Area, with that number projected to increase to approximately 822 jobs by 2026.

	Jobs (2021)	Jobs (2026)	Job Change %	Earnings (2020)
United States	791,672	785,911	(1%)	\$69,830
Kentucky	19,763	19,726	(0.2%)	\$64,844
Rowan County Labor Market Area	775	822	6%	\$44,046
Rowan County, KY	373	387	4%	\$49,203

INDUSTRY AGE

The chart below shows the age breakdown of workers in the wood products sector. Workers 55 and older make up 18% of the industry workforce.

Age of Industry Workers



OCCUPATION SNAPSHOT

4,611

Jobs (2020)
29% Above
US Average

+4.2%

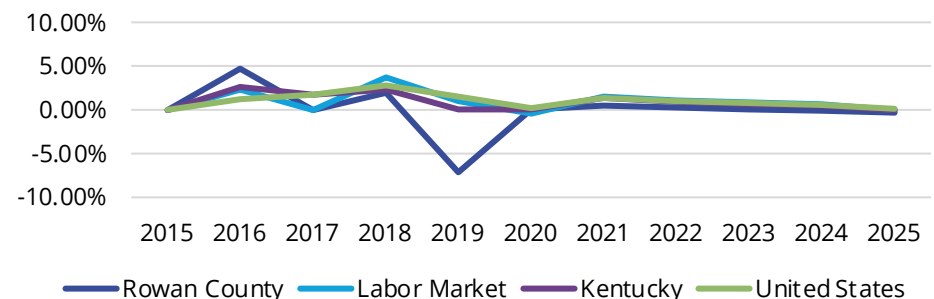
% Change
(2020 – 2025)
Nation: 3.9%

\$15.37/hr

Median Earnings
Nation:
\$18.85/hr

County	Jobs	Res Workers	Net Commuters
Rowan	4,611	1,341	189
Carter	942	1,241	(299)
Fleming	676	1,175	(499)
Morgan	510	799	(289)
Lewis	360	860	(499)
Bath	340	886	(547)
Menifee	170	477	(307)
Elliott	82	216	(134)

Job Change Wood Products



Source: EMSI Class of Worker Data 2021.1

WOOD PRODUCTS TOP 15 OCCUPATIONS

The table below shows the top occupations for the wood products sector for the Rowan County Labor Market Area. Occupation data can be seen for employment in the wood products sector and for the overall occupation regardless of sector. The data is sorted by overall 2021 jobs.

Description	EMPLOYED IN INDUSTRY			OVERALL OCCUPATION								
	2021 Jobs	2026 Jobs	% Change	2021 Jobs	2021 - 2026 Change	2021 - 2026 % Change	2020 Location Quotient	Avg. Hourly Earnings	Avg. Annual Openings	Regional Completions (2019)	Typical Entry Level Education	Automation Index
Laborers and Freight, Stock, and Material Movers, Hand	52	56	7%	541	16	3%	0.90	\$13.40	71	0	No formal educational credential	117.2
Heavy and Tractor-Trailer Truck Drivers	15	17	8%	468	9	2%	1.11	\$21.67	52	0	Postsecondary nondegree award	110.1
General and Operations Managers	16	18	8%	465	35	8%	0.95	\$35.15	43	160	Bachelor's degree	82.2
Miscellaneous Assemblers and Fabricators	133	134	1%	415	(14)	(3%)	1.61	\$13.87	40	0	High school diploma or equivalent	112.6
Maintenance and Repair Workers, General	13	14	8%	391	14	4%	1.29	\$16.90	37	0	High school diploma or equivalent	109.6
Carpenters	23	25	10%	353	6	2%	1.64	\$19.05	34	0	High school diploma or equivalent	125.9
Helpers--Production Workers	26	27	5%	200	(4)	(2%)	3.38	\$13.94	27	0	High school diploma or equivalent	120.0
First-Line Supervisors of Production and Operating Workers	28	30	8%	183	8	4%	1.48	\$25.34	18	0	High school diploma or equivalent	88.6
Industrial Truck and Tractor Operators	40	44	8%	179	(1)	(0%)	1.38	\$18.05	19	0	No formal educational credential	119.5
Inspectors, Testers, Sorters, Samplers, and Weighers	12	12	(3%)	134	(6)	(4%)	1.20	\$17.34	14	0	High school diploma or equivalent	106.1
Industrial Machinery Mechanics	16	17	10%	129	13	10%	1.61	\$23.88	13	0	High school diploma or equivalent	109.8
Sawing Machine Setters, Operators, and Tenders, Wood	95	100	5%	97	5	5%	9.45	\$12.47	13	0	High school diploma or equivalent	120.4
Woodworking Machine Setters, Operators, and Tenders, Except Sawing	95	105	10%	96	10	10%	6.26	\$13.36	15	0	High school diploma or equivalent	119.0
Cabinetmakers and Bench Carpenters	22	21	(1%)	29	2	5%	1.41	\$14.38	3	0	High school diploma or equivalent	124.3
Machine Feeders and Offbearers	16	17	8%	28	1	5%	2.05	\$14.88	4	0	No formal educational credential	119.3
				3,708	93	3%		\$19.34	404			

Source: EMSI Class of Worker Data 2021.1