

MIDDLE-SKILL SPOTLIGHT

AN ANALYSIS OF FOUR IN-DEMAND SECTORS
WITH A COMMUNITY COLLEGE FOCUS



emsi

THE SPOTLIGHT IS ON COMMUNITY COLLEGES.

This is true both nationally and regionally because of the relevant job training they offer, the industry partnerships they develop, and the part they play in giving people pathways to careers that pay family-sustaining wages. In this report, EMSI summarizes how community colleges can best understand their local labor markets and employer demand, and examines four key areas of the economy with clear training needs.

CONTENTS

INTRODUCTION	2
THE VALUE OF COMMUNITY COLLEGES	4
IN-DEMAND SECTORS WITH A COMMUNITY COLLEGE FOCUS	6
 HEALTH CARE	8
 INFORMATION TECHNOLOGY	10
 SKILLED TRADES	12
 BUSINESS & FINANCE	14
CONCLUSION	16

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INTRODUCTION

The term **skills gap** has sprung up so often that it has reached buzzword status, similar to *Big Data*. It means different things in different contexts, and to some, it doesn't mean anything at all. While there are different manifestations of skills gaps (both real and perceived), **they often boil down to local training gaps**. Employers are unwilling or unable to train new hires or existing employees, and local training providers either don't have a way or don't have enough information to understand or address employers' very specific skills needs.

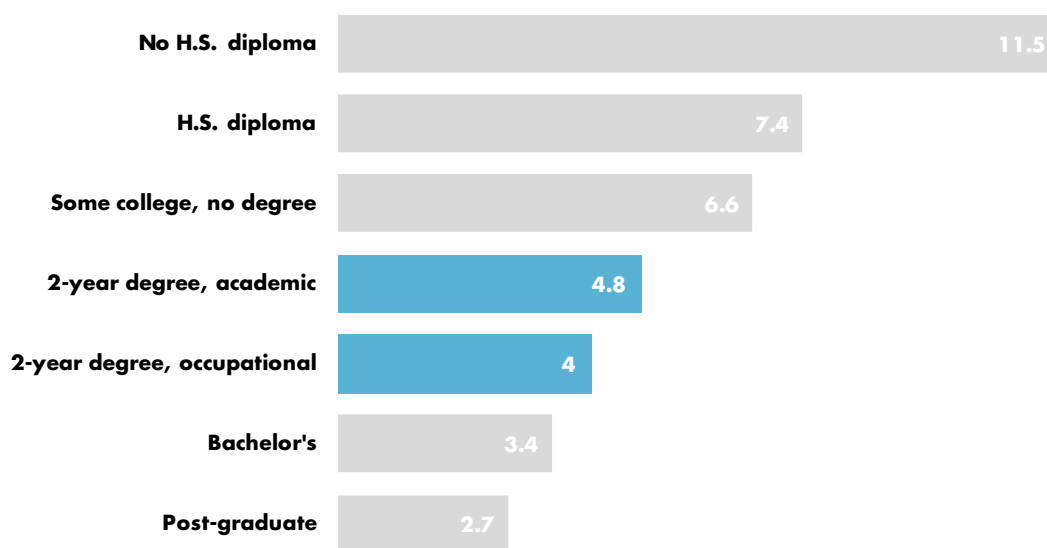
Cait Murphy chronicled this phenomenon in the April issue of *Inc. Magazine* (and we also wrote about it recently in *Forbes*). "It is not so much that the U.S. has a skills gap," Murphy wrote, "but that there are specific issues in specific places."

"When we're talking about these middle-skill jobs, it's not that we **hope** that they're out there and we're going to begin programs for students; it's that we **know** that they're out there. We're actually looking at the demand from employers."

– ANNE KRESS,
president of Monroe Community College on WXXI-AM
in Rochester, on why labor market information is critical

Some businesses have turned to apprenticeships to help find workers for hard-to-fill openings — many of them middle-skill jobs. But it also works in the other direction. Community colleges and other regional educational institutions can take the initiative and develop industry partnerships. *Inc. Magazine* profiled Monroe Community College and Walla Walla Community College, two colleges

UNEMPLOYMENT RATE BY ED ATTAINMENT



Data for April 2014. Source: Bureau of Labor Statistics via The New York Times

that have worked with EMSI to help bridge gaps and improve their regional economies. Marketplace also highlighted Hudson Valley Community College in upstate New York, which has a tech-focused campus that's on the "front lines of the effort to get more local workers into middle-skill jobs." And this work is happening in other parts of the country, too.

Community colleges are in the thick of combating these local training gaps, largely because they're best equipped to address them. They train nearly 50% of undergraduate students in the U.S., and they do so affordably. Many are nimble enough to set up short-term or accelerated training programs that address employers' most pressing skill needs and lead to stable careers with good earning potential

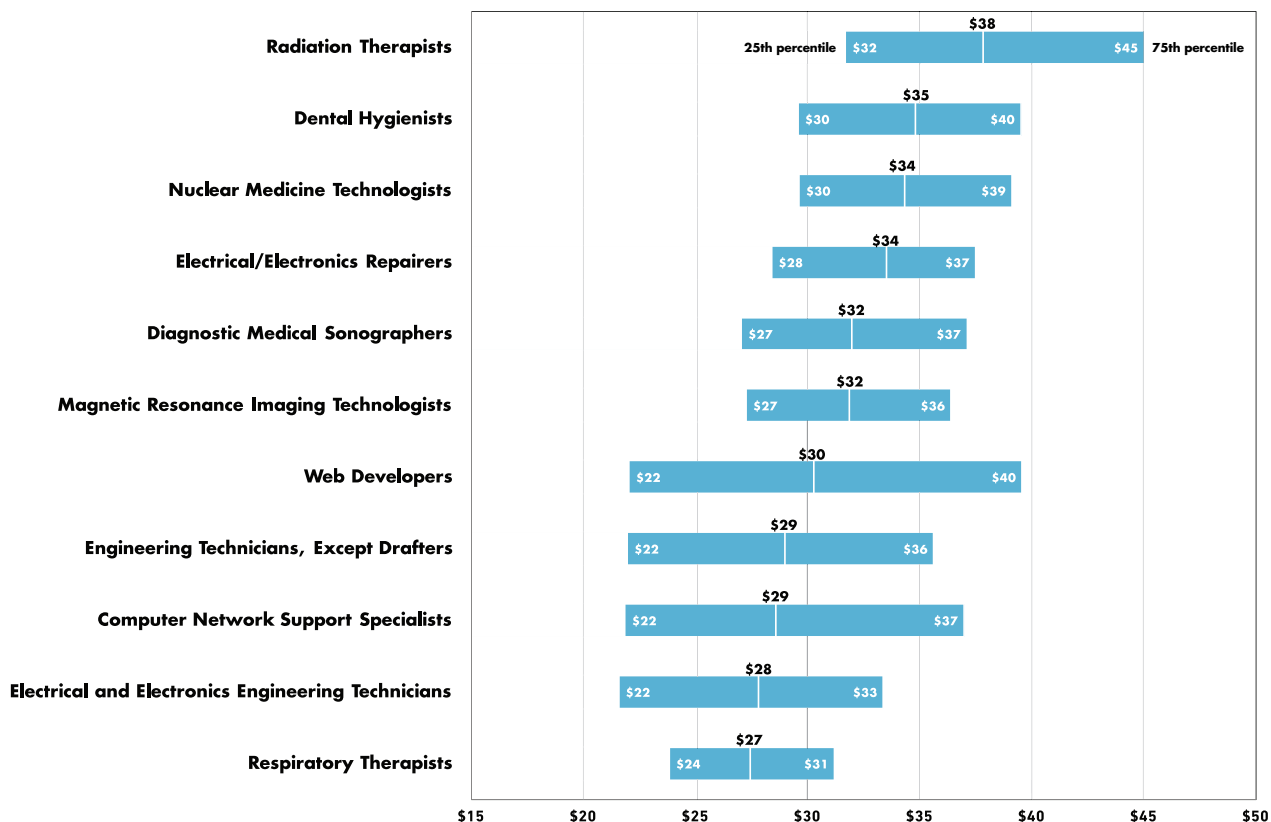
for graduates. This means they have become key players in the efforts to improve the economic prosperity of the regions they serve — and the nation as a whole.

The community colleges leading the way are the ones that best understand the basics of their local economy and communicate that information to students. For any college, a good starting point is to explore data on the industries or industry clusters that shape and drive their local economy, and how those sectors relate to the career-oriented training they provide.

In this report, we explore these in-demand sectors to give colleges a better handle on the economic and labor market landscape that students will face.

HIGHEST-PAYING MID-SKILL OCCUPATIONS

2012 Wages for Jobs That Typically Require Certificate or 2-Year Degree for Entry



THE VALUE OF COMMUNITY COLLEGES

Community colleges have long been considered a wise investment for students. People of all ages and backgrounds can earn the certificate or degree they need in order to land a well-paying job or get vital retraining while still in the workforce — with little to no debt. The math adds up.

However, as EMSI has measured for well over a decade, community colleges are also a worthwhile investment for taxpayers and society in general. And they play a vital role in their local economies, both in the total added income they bring to their local area and in the increased productivity of students who are part of the local workforce.

Across the United States, technical and community colleges carry serious economic weight. The cumulative impact of the nation's nearly 1,200 community colleges is immense. EMSI's study for the American Association of Community Colleges (AACC) showed that two-year colleges had an \$809 billion net impact on the American economy in 2012. That's equal to 5.4% of national gross domestic product, or 15.5 million average-paying jobs.

THE ANNUAL NET IMPACT OF TWO-YEAR COLLEGES IN 2012

**\$809 Billion
Net Impact**

**5.4% of
U.S. GDP**

**15.5 Million
Avg. Wage Jobs**

Community colleges and other higher education institutions benefit a region like any other business does: through their spending as well as salaries given to faculty, staff, and administrators. Their primary impact, however, stems from the education they offer. Anyone who has studied at a two-year college enters or re-enters the workforce with new skills.

STUDENT PERSPECTIVE

\$97.5
costs
(billions)

\$469.3
Benefits
(billions)

\$371.8
Net present
value (billions)

4.8
Benefit-cost
ratio

3.8
Return on
Investment

17.8%
Rate of
return

TAXPAYER PERSPECTIVE

\$44.9
costs
(billions)

\$309.9
Benefits
(billions)

\$360.1
Net present
value (billions)

6.8
Benefit-cost
ratio

5.8
Return on
Investment

14.3%
Rate of
return

“The best way for community colleges to inform and cultivate relationships with businesses is to have a strong grasp on their regional economy: what industries are most important to their region, and what type of workers drive productivity in those industries.”

Millions of these students are working across the country today, and when they apply those skills, they're rewarded with higher incomes than they would have otherwise. (Think of someone working two part-time jobs who becomes a nurse, or an unemployed miner who becomes a lineworker.) They also raise business profits through their increased productivity. Together, these higher incomes and increased profits create even more income as they are spent.

Community colleges with the biggest impacts tend to be the ones that are closely connected to the needs of local businesses. If they're offering programs that address local demand, they give their students a better chance of finding jobs, and thus lower the unemployment in their region. This means colleges will have more former students in the local workforce, the productivity of local firms will go up, and their economic returns to the region will be higher.

One way community colleges can make sure their programs are attuned to regional demand is to survey local businesses and develop industry partnerships. And the best way to inform and cultivate relationships with businesses is to have a strong grasp on their regional economy: what industries are most important to their region, and what type of workers drive productivity in those industries.

This is where analyzing labor market data proves to be a foundational early step.

The data and analysis in this report come from EMSI's extensive database of labor market information. EMSI brings together information on more than 150 million jobs in the U.S. from 90-plus data sources. Since 2000, EMSI has worked with over half of the nation's community colleges to provide the crucial data and insight they need in order to align programs to labor market issues and understand the impact these activities have on their communities.

IN-DEMAND SECTORS WITH A COMMUNITY COLLEGE FOCUS

It's a simple but powerful point. Some industries rely more than others on employees with mid-level expertise — the exact type of worker that a community college specializes in training through certificate and two-year programs. Middle-skill jobs are prevalent in advanced manufacturing, health care, information technology, sales and

marketing, transportation, and energy. Not coincidentally, these are also the most common sectors (depending on the region) in which employers have a hard time finding talent. And they're among the fastest-growing industries in the U.S. after the Great Recession.

There are 21 high-level industries (3-digit NAICS) that saw at least an 8% rise in

INDUSTRIES THAT GREW 8% OR MORE NATIONWIDE, 2010-2013



jobs from 2010 to 2013, and 14 of them are related to energy, IT, manufacturing, health care, or transportation. These high-growth areas include support activities for mining (43% job growth), other information services (30%; e.g., internet publishing), and oil and gas extraction (25%) — the three industries with the fastest growth rates — as well as transportation equipment manufacturing (13%) and fabricated metal product manufacturing (12%). Meanwhile, professional, scientific, and technical services and ambulatory health care services grew 9% each and added the third- and fourth-most jobs nationwide from 2010 to 2013 (634,000 and 520,000, respectively), behind only administrative and support services (the broad sector that contains temporary help services) and food services and drinking places.

Within these and other industries, some occupations that are commonly thought of as requiring bachelor's degrees actually have a significant percentage of associate's degree holders and those with some college.¹ Just over 34% of IT workers, for instance, have some college,¹ an associate's degree, or no degree at all. In health care, that percentage is even higher — 47% as of 2010-2011.

In this next section, we profile four high-growth, often-hard-to-fill occupational sectors with solid career pathway potential — **health care; information technology; skilled trades, production, and energy**; and **business, finance, sales, and marketing** — as well as the specific community college-related occupations inside each one.

¹ Educational requirements in the workforce change over time, something the Georgetown University Center on the Education and Workforce has emphasized. In its Recovery 2020 report, Georgetown estimates that 65% of all job openings through 2020 will require postsecondary education. That's much higher than the BLS's projections, and further still, Georgetown suggests that in four of the five fastest-growing fields (STEM, health care professional and technical, education, and community services), more than 80% of jobs will require high levels of postsecondary education. [HTTP://CEW.GEORGETOWN.EDU/RECOVERY2020](http://cew.georgetown.edu/recovery2020).

**TO LEARN ABOUT THE PERFORMANCE OF THESE OR OTHER OCCUPATION SECTORS
IN YOUR REGION, CONTACT EMSI AT ECONOMICMODELING.COM**



HEALTH CARE

Health care programs, especially those centered in allied health, are a major focus for community colleges, and for good reason. No sector since 2001 has been as consistent in employment growth year over year, and no sector has as many occupations with a two-year training focus.

\$17.29

in median hourly earnings
for mid-skill occupations vs.
\$27.19 for all health fields.

40%

employed in mid-skill
occupations are 45 years
or older.

5.4 MIL.

of all health care jobs (45%)
are in mid-skill occupations.

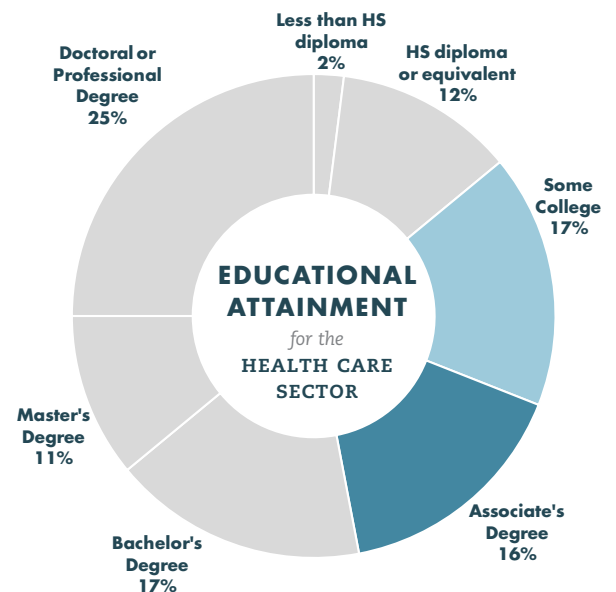
HEALTH CARE OCCUPATION OVERVIEW

Health care is a job-producing force in nearly every region. As we mentioned in the introduction, **ambulatory health care services** added the fourth-most jobs from 2010 to 2013 — and added more than any other industry sector from 2001 to 2013 (over 2 million new jobs). **Private hospitals** and **nursing and residential care facilities** have also been among the biggest gainers.

There are 78 detailed health care occupations, 27 of which the BLS lists as requiring an associate's degree or postsecondary non-degree award as the entry level of education (what we refer to as mid-skill or community college-related occupations). The entry education level for registered nurses is an associate's degree, though hospitals are increasingly requiring a four-year degree, and often experience or a specialty focus. As of 2010-2011, 38% of RNs had an associate's degree but 55% held at least a bachelor's. For these reasons, we excluded RNs from our mid-skill training analysis.

INDUSTRY FOCUS

Nearly two-thirds of jobs in community college-related health care occupations are in one of four industries: general medical and surgical hospitals, nursing care facilities, offices of physicians, and offices of dentists. The fastest-growing large industries for these occupations (those with at least



10,000 jobs in 2013) are outside hospital settings:

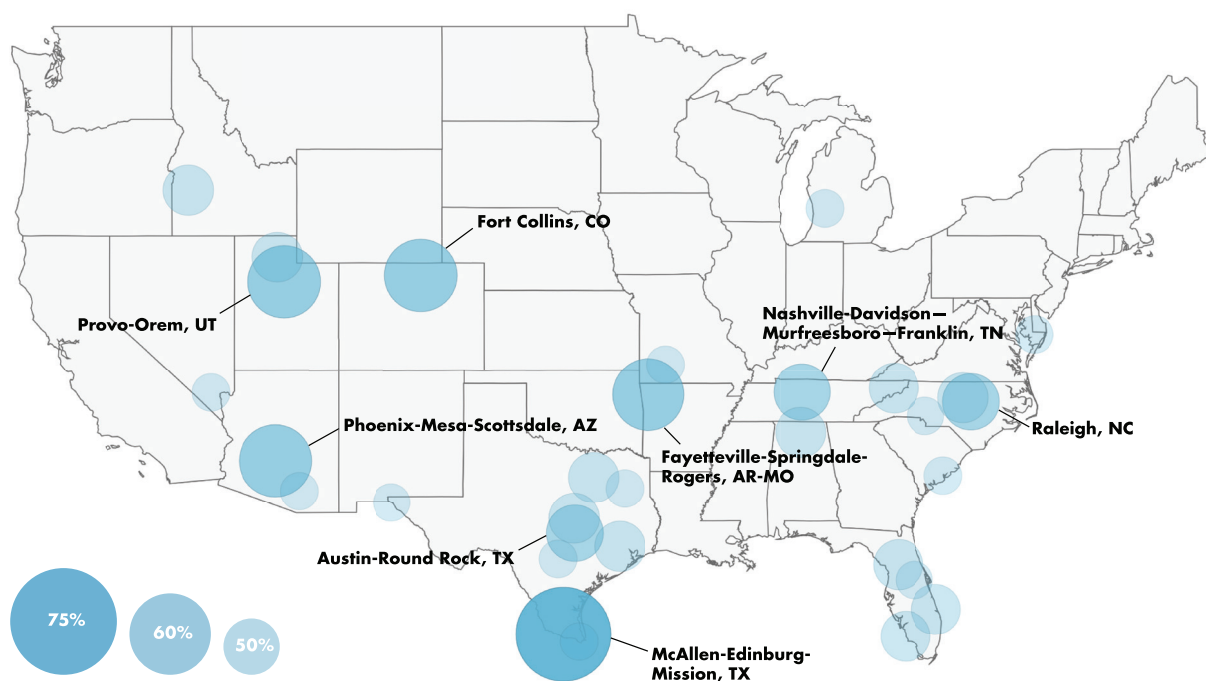
- Services for the elderly and persons with disabilities** (236% growth since 2001)
- Offices of all other health practitioners** (125%)
- Offices of physical, occupational and speech therapists, and audiologists** (104%)

OCCUPATIONS WITH TWO-YEAR TRAINING FOCUS

From 2001 to 2013, the fastest-growing mid-skill health care occupations were **physical therapy aides** (53%), **physical therapy assistants** (52% growth), **occupational therapy assistants** (50%), and **diagnostic medical sonographers** (48%). In each

METROS WITH MORE THAN 40% GROWTH IN THE HEALTH CARE SECTOR

Health care jobs are everywhere, but no metro has added community college-related health care jobs faster since 2001 than **McAllen-Edinburg-Mission, Texas** (74% growth). **Fort Collins, Colorado**, and **Provo-Orem, Utah**, have also seen huge job gains (both 57%), while **Phoenix** and **Fayetteville, Arkansas**, are hotspots as well (both 55%).



of these fields, at least two-thirds of workers had an associate's degree or some college, no degree as of 2010-2011.

Nursing assistants led all community college-related occupations with more than 200,000 jobs added from 2001 to 2013, followed by **LPNs** and **medical assistants**. In fact, the five mid-skill health care occupations that added the most jobs all require a postsecondary non-degree award at the entry level.

Health care also presents bountiful career pathway progressions (i.e., better-paying job opportunities for workers who advance their skills). In the following table, we show the most promising bachelor's degree-related transfer opportunities in health care; these are fields that are often just a step removed from the two-year training route and offer advancement in wages.

OCCUPATION	2013 JOBS	2001-2013 CHANGE	WORKERS W/ASSOC. OR SOME COLLEGE	WORKERS W/BACH+
TOP COMMUNITY COLLEGE-RELATED OCCUPATIONS				
Nursing Assistants	1,445k	203k (+16%)	40%	9%
Licensed Practical and Licensed Vocational Nurses	736k	136k (+23%)	76%	5%
Medical Assistants	568k	131k (+30%)	65%	9%
Emergency Medical Technicians and Paramedics	235k	53k (+29%)	69%	15%
Dental Assistants	304k	50k (+20%)	58%	9%
TOP BACHELOR'S-RELATED TRANSFER OPPORTUNITIES				
Registered Nurses	2,682k	464k (+21%)	43%	56%
Medical and Clinical Laboratory Technologists	162k	24k (+17%)	36%	52%
Dietitians and Nutritionists	59k	12k (+24%)	11%	75%



INFORMATION TECHNOLOGY

Like health care, information technology is a vibrant sector that offers ample career pathway opportunities for students. Several mid-skill IT occupations, in fact, match up nicely with the courses that community colleges offer.

\$28.01

in median hourly earnings
for mid-skill occupations vs.
\$38.88 for all IT fields.

72%

of IT workers are male, and
nearly 60% are between 25
and 44 years old.

1.2 MIL.

of all IT jobs (30%) are in
mid-skill occupations.

IT OCCUPATION OVERVIEW

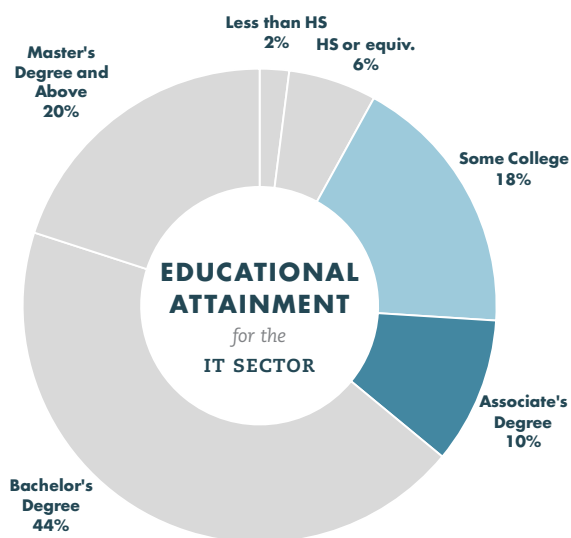
Earlier we mentioned the scintillating job growth of the other information services industry sector. Nearly all the jobs added in this sector — before and after the recession — can be traced to one sub-industry: **internet publishing and broadcasting and web search portals**. This is one of several detailed industries that approximates information technology. But really, IT is best explained at the occupational level, since the skills that IT workers possess are needed (and can be found) in almost every industry.

Of the sectors analyzed in this report, IT has the lowest share of workers with associate's degrees or some college (28%) and the highest share of bachelor's and advanced degree holders (66%). However, inside the IT sector, a number of occupations — from **network and computer system administrators** to **information security analysts** — have a surprisingly large share of workers with less than four years of education.

The U.S. had 3.9 million IT jobs in 2013, an increase of just over 200,000 since 2001. The sector saw a lull during the tech bust in the early 2000s, and another brief dip in employment during the recession.

INDUSTRY FOCUS

The most common industry for community college-related IT occupations is **computer systems design and related services**, with 19% of workers in the four



fields. Yet IT workers can be found in nearly every industry, as we see in the fastest-growing industries for community college-related IT occupations (those with at least 5,000 jobs in 2013):

Internet publishing and broadcasting and web search portals (136% growth since 2001)

Office administrative services (67%)

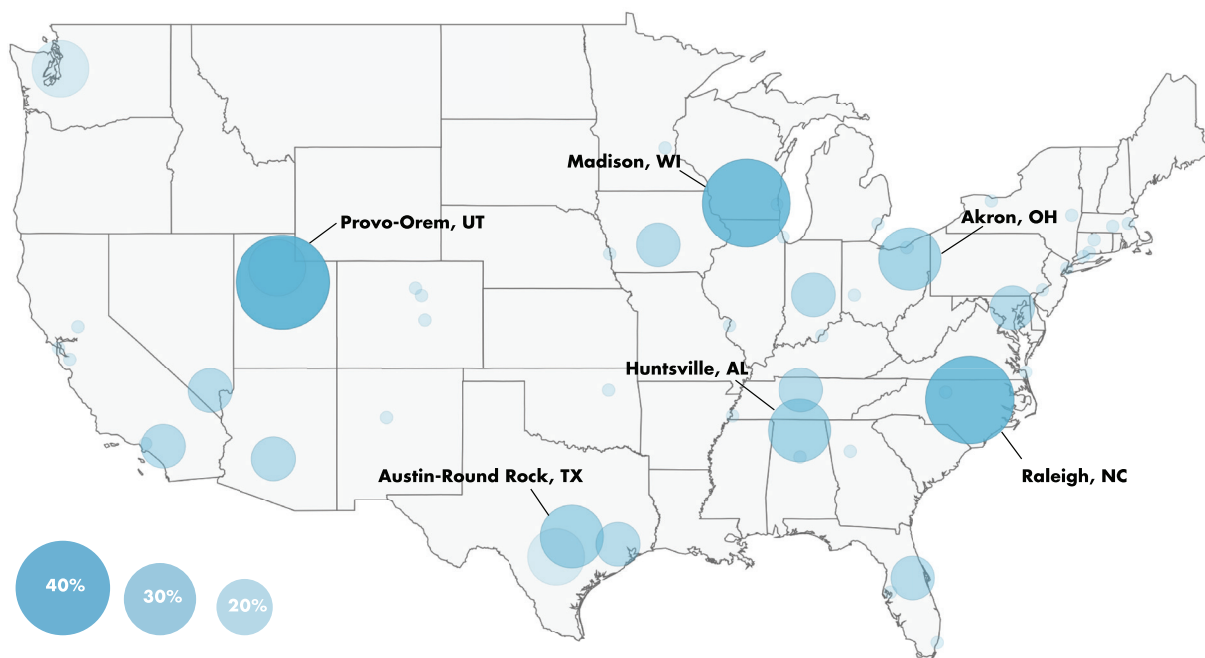
Wholesale trade agents and brokers (66%)

OCCUPATIONS WITH TWO-YEAR TRAINING FOCUS

From 2001 to 2013, the fastest-growing community college-related IT occupation was **computer user support specialists** (39,000 jobs added). Nearly half of the workers in this occupation have an associate's

METROS WITH MORE THAN 15% GROWTH IN THE IT SECTOR

Since 2001, IT job growth in community college-related occupations has been most robust in **Provo-Orem, Utah** (42%), **Madison, Wisconsin** (38%), and **Raleigh, North Carolina** (35%). Raleigh is part of the Research Triangle, but Provo and Madison aren't necessarily known as tech hotspots. The same is true for **Huntsville, Alabama**, and **Akron, Ohio**, both of which grew 26%.



or some college, but no degree. Meanwhile, the U.S. has added nearly 11,000 **web developers** since 2001, good for an 11% growth rate. Although just over a quarter of web developers have an associate's or some college, the BLS lists an associate's degree as the entry level of education for the occupation.

Another occupation that many community colleges are already focusing on: **network and computer system administrators** (5,500 jobs added since 2001). More than 40% of workers in this occupation have a two-year degree or some college but no degree. Community college-related completers make up a large share of degrees/certificates conferred in two of the main programs that train for network and computer system administrators: **computer and information systems security/information assurance** (CIP 11.1003) and **network and systems administration/administrator** (CIP 11.1001). In 2012, 7,200 of the 12,930 completions in these two programs were associate's degrees or short-term awards/certificates, and nearly 3,800 were associate's degrees.

OCCUPATION	2013 JOBS	2001-2013 CHANGE	WORKERS W/ASSOC. OR SOME COLLEGE	WORKERS W/BACH+
TOP COMMUNITY COLLEGE-RELATED OCCUPATIONS				
Computer User Support Specialists	540k	39k (+8%)	45%	43%
Web Developers	107k	11k (+11%)	26%	69%
Network and Computer Systems Administrators	357k	5k (+2%)	42%	51%
Computer Network Support Specialists	171k	-8k (-5%)	45%	43%
TOP BACHELOR'S-RELATED TRANSFER OPPORTUNITIES				
Computer Systems Analysts	503k	57k (+13%)	23%	72%
Software Developers, Applications	610k	49k (+9%)	14%	84%
Information Security Analysts	76k	16k (+26%)	36%	57%
Dietitians and Nutritionists	59k	12k (+24%)	11%	75%



SKILLED TRADES

Jobs in the skilled trades, production, and energy sector have returned in a big way since the recession, and many pay well too. This is the only sector we analyzed in which mid-skill (or community college-related) occupations pay more than all occupations in the sector.

\$22.79

in median hourly earnings for mid-skill occupations — higher than pay for all occupations (\$22.46) in this sector.

21%

of workers in this sector are 55 years or older and 29% are 45 to 54.

2.1 MIL.

of all jobs in this sector (36%) are in mid-skill occupations.

SKILLED TRADES OCCUPATION OVERVIEW

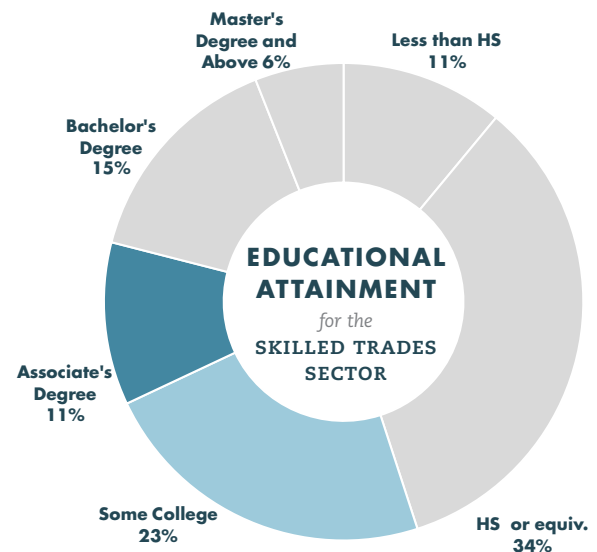
Manufacturing has added the sixth-most jobs of any industry sector since 2010 (nearly 500,000). **Mining, quarrying, and oil and gas extraction** has grown at the fastest rate over the same time (28%). **Construction** has bounced back from the housing bust and recession to grow 5% since 2010. Each of these sectors relies on a steady stream of skilled trades, production, and energy-related workers, many of them middle-skilled and many of them aging.

Most of the in-demand positions in this sector call for certificates or other short-term training that community colleges specialize in. All told, we identified 18 of 44 detailed skilled trades, production, and energy occupations that are in the community college sweet spot.

These are fields that many young people don't think offer plentiful job opportunities (or which they view as just plain undesirable). This perception problem helps fuel what will be a skills shortage in future years — if it is not one already — in many regions.

INDUSTRY FOCUS

Nearly 1 in 5 mid-skill jobs in the skilled trades, production, and energy sector are in the electrical contractors and other wiring installation contractors industry. The next most common industries are



machine shops (6% of all jobs) and metalworking machinery manufacturing (3%). But oil and gas industries — and temporary help — also figure prominently in the fastest-growing industries for these occupations (those with at least 5,000 jobs in 2013):

Motor vehicle seating and interior trim manufacturing (45% growth since 2010)

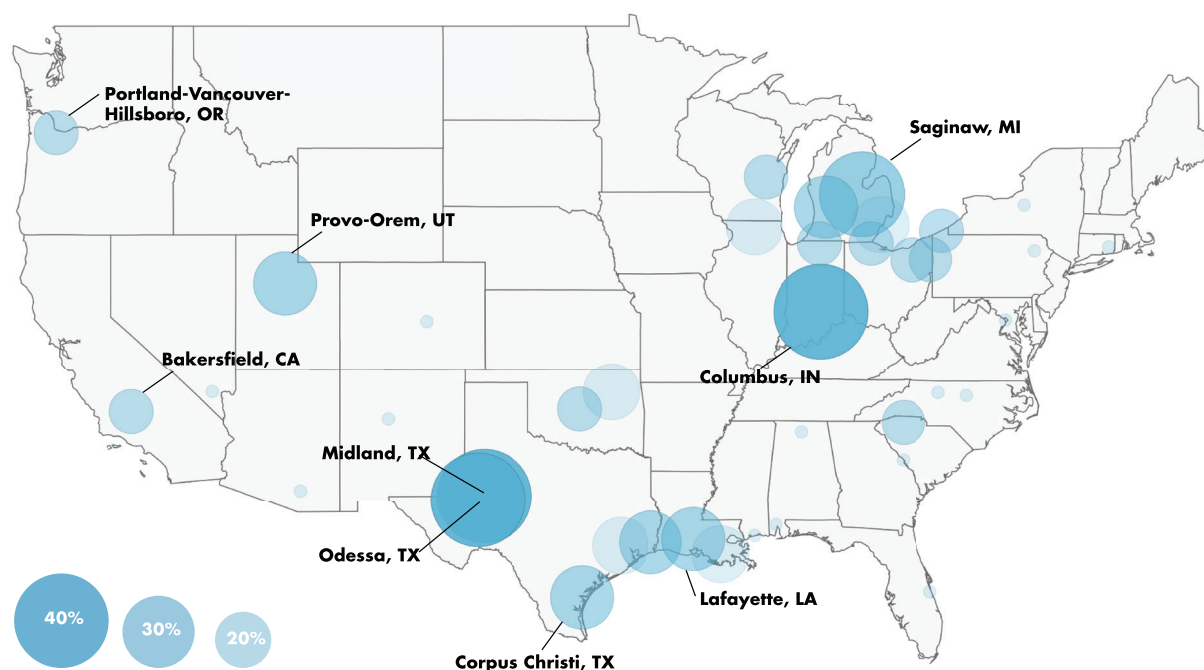
Support activities for mining (44%)

Mining and oil and gas field machinery manufacturing (37%)

Temporary help services (30%)

METROS WITH MORE THAN 15% GROWTH IN THE SKILLED TRADES SECTOR

Metros reliant on oil and gas or manufacturing saw the most dramatic rebounds in mid-skill workers in this sector from 2010 to 2013. Leading the way were two West Texas metros: **Midland** (57%) and **Odessa** (53%). **Columbus, Indiana**, home to engine-maker Cummins, grew 41%, while **Saginaw, Michigan**, was up 41%.



OCCUPATIONS WITH TWO-YEAR TRAINING FOCUS

Of the 18 community college-related occupations in this sector, **machinists** performed the best from 2010 to 2013, growing by 51,000 jobs. Machinists are vital to manufacturing firms, and they appear to be in short supply in heavily industrialized regions. This is one occupational area that community colleges, like Monroe Community College in Rochester, New York, have helped infuse with new talent through accelerated programs.

In addition to **machinists**, **industrial machinery mechanics**, **electricians**, and **computer-controlled machine tool operators** have also bounced back nicely from the recession — and all have a strong concentration of workers with an associate's or some college (at least 40%). Meanwhile, **mechanical engineers** and **industrial engineers** are two of several fields that present solid career pathway options as predominantly bachelor's degree occupations.

OCCUPATION	2013 JOBS	2010-2013 CHANGE	WORKERS W/ASSOC. OR SOME COLLEGE	WORKERS W/BACH+
TOP COMMUNITY COLLEGE-RELATED OCCUPATIONS				
Machinists	396k	51k (15%)	41%	3%
Industrial Machinery Mechanics	315k	35k (12%)	41%	6%
Electricians	537k	28k (5%)	46%	7%
Computer-Controlled Machine Tool Operators, Metal and Plastic	144k	21k (17%)	42%	7%
Tool and Die Makers	79k	9k (13%)	48%	4%
TOP BACHELOR'S-RELATED TRANSFER OPPORTUNITIES				
Mechanical Engineers	260k	18k (7%)	21%	74%
Industrial Engineers	226k	17k (8%)	23%	72%
Petroleum Engineers	41k	8k (24%)	14%	83%



BUSINESS & FINANCE

The business, finance, sales, and marketing sector is the largest of the four we analyzed, accounting for 15.3 million jobs nationwide. Nearly a quarter of mid-skill workers in this sector (23%) are at least 55 years old, meaning workforce shortages could be acute in coming years.

\$19.47

in median hourly earnings for mid-skill occupations in this sector.

23%

of mid-skill workers in business, finance, sales, and marketing are 55 or older.

4.3 MIL.

of all business & finance jobs (28%) are in mid-skill occupations.

BUSINESS & FINANCE OCCUPATION OVERVIEW

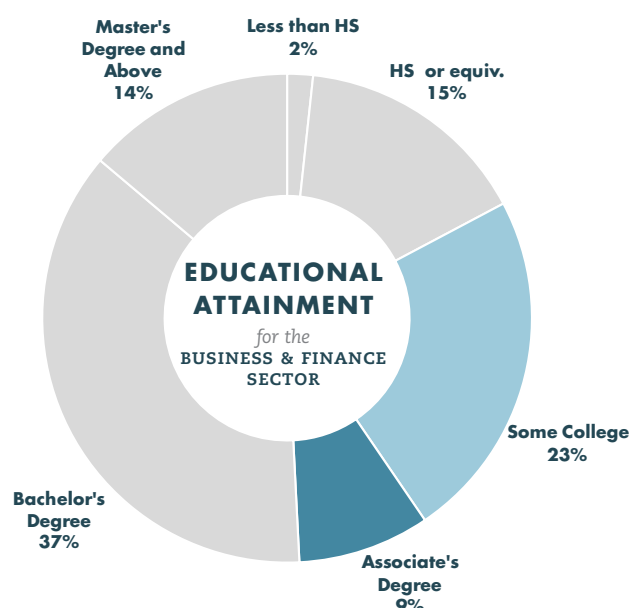
There's little doubt that many occupations in the business, finance, sales, and marketing sector are in high demand. The rapid job growth in recent years indicates that. So too does the fact that employers often cite these workers — and the skills they possess — as being hard to find. More than with the other sectors we analyzed in this report, however, it's difficult to establish clear links between postsecondary training and some of these jobs.

That said, mid-skill jobs still abound in business, finance, sales, and marketing — jobs like **bookkeeping, accounting, and auditing clerks** and **sales representatives, for wholesale and manufacturing, technical and scientific products**. Almost a third of all workers in this sector have an associate's degree or some college but no degree (the majority of which fall into the some college category). Just over half have a bachelor's or advanced degree.

INDUSTRY FOCUS

Jobs in mid-skill fields in business, finance, sales, and marketing are spread across dozens of industries, most notably **management of companies and enterprises** (4.5% of all jobs), **offices of physicians** (4.4%), and **accounting, tax preparation, bookkeeping, and payroll services** (4.2%).

Overall, health care industries are some of the fastest-growing for mid-skill business and finance



jobs (among industries with at least 5,000 of these jobs in 2013):

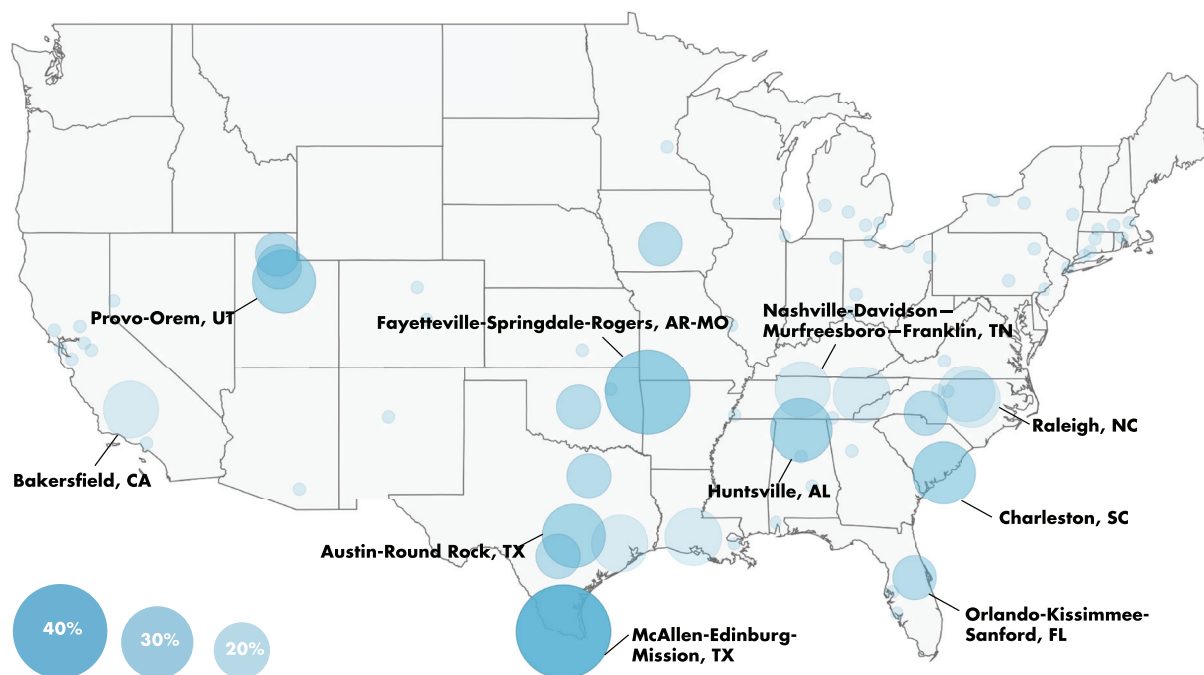
- Support activities for mining** (109% growth since 2001)
- Home health care services** (85%)
- Office administrative services** (72%)
- Outpatient care centers** (68%)

OCCUPATIONS WITH TWO-YEAR TRAINING FOCUS

Of the 14 selected mid-skill occupations in this sector that best align with community colleges, **billing and posting clerks** and **bookkeeping, accounting, and auditing clerks** have added the most jobs since 2001. In both of these fields, roughly 50% of the current

METROS WITH MORE THAN 15% GROWTH IN THE BUSINESS & FINANCE SECTOR

Like it was for health care, **McAllen-Edinburg-Mission, Texas**, is the fastest-growing metro for business, finance, sales, and marketing jobs in the mid-skill realm, with 41% growth since 2001. Overall, the South shows up strong — **Fayetteville** (33%), **Charleston** (25%), **Nashville** (23%), and **Knoxville** (22%) have all made big jumps in employment.



workforce have an associate's degree or some college, but no degree. Moreover, in 2012, more than half of the completers in accounting technology/technician and bookkeeping (CIP 53.0302) — the primary educational program that trains for these workers — were at the associate's level, while the rest obtained awards of less than one or two years. Completers from this program have more than doubled nationwide since 2007.

At the bachelor's and above level, there are several high-growth transfer opportunities that fit nicely in a career pathway model, most notably **market research analysts and marketing specialists** (65,000 jobs added since 2001) and **meeting, convention, and event planners** (27% growth).

OCCUPATION	2013 JOBS	2001-2013 CHANGE	WORKERS W/ASSOC. OR SOME COLLEGE	WORKERS W/BACH+
TOP COMMUNITY COLLEGE-RELATED OCCUPATIONS				
Billing and Posting Clerks	506k	55k (12%)	48%	17%
Bookkeeping, Accounting, and Auditing Clerks	1,650k	33k (2%)	49%	17%
Interviewers, Except Eligibility and Loan	198k	27k (16%)	49%	27%
Logisticians	126k	18k (16%)	43%	42%
TOP BACHELOR'S-RELATED TRANSFER OPPORTUNITIES				
Market Research Analysts and Marketing Specialists	413k	65k (19%)	18%	77%
Accountants and Auditors	1,185k	63k (6%)	17%	78%
Meeting, Convention, and Event Planners	74k	16k (27%)	27%	60%

CONCLUSION

Whether it's in one of the four sectors we've analyzed or in the many others that community colleges train for, two-year colleges are well positioned to address employers' workforce challenges and, by extension, improve the economic conditions of the regions they serve. But to sort out these challenges, colleges need to first understand them. This is where labor market data and business surveys are so helpful.

It could be health care in Provo, information technology in Seattle, skilled trades in Houston, or business and finance in Charleston. Bottom line, different regions specialize in different sectors, and skills gaps (where they exist) are primarily isolated to local areas. Community colleges, working alongside businesses, are the institutions best structured to resolve these gaps, particularly those in the mid-skill realm.

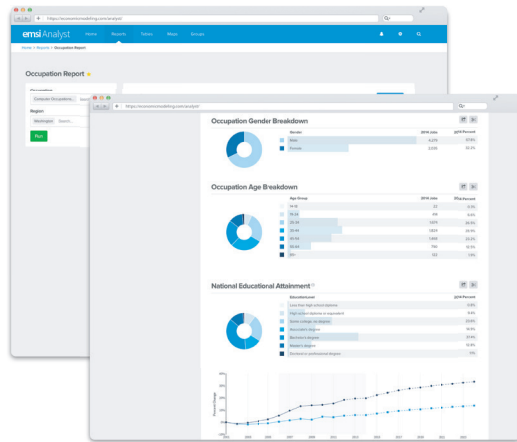


ABOUT EMSI AND THE DATA IN THIS REPORT

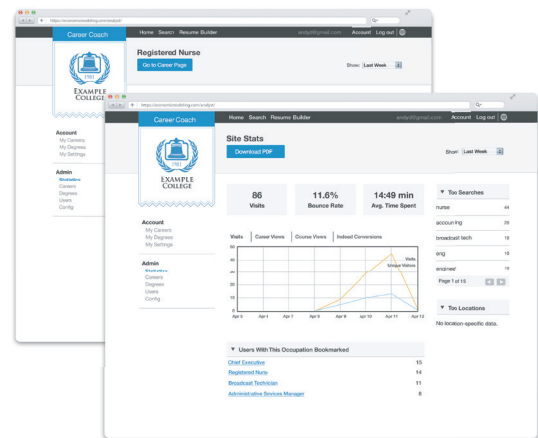
EMSI gathers and integrates economic, labor market, demographic, and education data from over 90 government and private-sector sources, creating a comprehensive and current database with full coverage of the United States. Industry, workforce, education, demographic, and other selected data are available at state, metropolitan area, and county levels, with ZIP code estimates available for our core data. By combining data from multiple sources, we fill gaps in individual sources that are due to nondisclosure or lack of coverage, and thus yield a composite database that benefits from the strengths of all of its sources. Finally, our database is updated quarterly, so our subscribers have access to the most up-to-date, integrated information possible.

The data for this report came from EMSI's 2014.1 data release, specifically our QCEW Employees dataset — a slightly modified version of the Bureau of Labor Statistics' Quarterly Census of Employment and Wages.

EMSI'S SERVICES FOR HIGHER EDUCATION



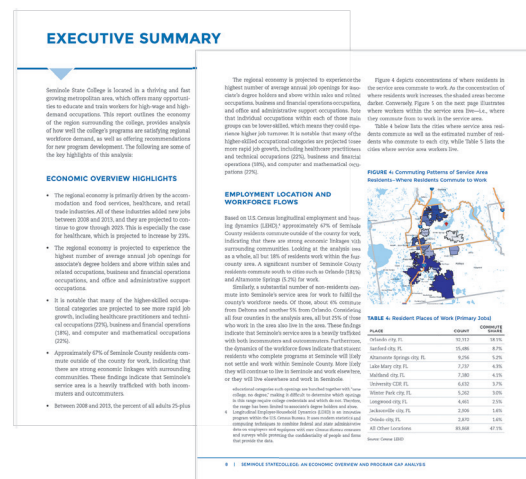
Analyst: This online labor market research tool gives detailed data on regional industries and occupations, helping colleges align their programs to the needs of the community.



Career Coach: EMSI's public-facing web tool makes it easy for colleges to show current and prospective students helpful data about the real-world results of different degree paths.



Economic Impact Study: The EIS is a rigorous, dollars-and-cents analysis of your college's regional and state contribution, giving you proof of the positive role your institution plays.



Gap Analysis Report: This report shows colleges how well their programs are (or aren't) equipping workers with the specific workforce needs of the local economy.

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THE SPOTLIGHT IS ON COMMUNITY COLLEGES.

This is true both nationally and regionally because of the relevant job training they offer, the industry partnerships they develop, and the part they play in giving people pathways to careers that pay family-sustaining wages.

In this report, EMSI summarizes how community colleges can best understand their local labor markets and employer demand, and examines four key areas of the economy with clear training needs.

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