



A Competitive Realities Report for Conecuh County, Alabama

Summary of Phase I of the
Economic Development Action Plan

August 28, 2017

Prepared for the Conecuh County Board
of Commissioners



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INTRODUCTION

In late June 2017, the Conecuh County Commission (Commission) retained Garner Economics, LLC to develop an Economic Development Strategy that will consider the current state of the county's existing plans and will provide a roadmap for the county to create economic opportunities for its citizens.

Conecuh County, Alabama



The focus of this engagement is for the Commission to understand the product improvement, marketing, and potential organizational changes it must make to ensure that the county strengthens its competitive position and is able to attract and retain the types of businesses that will continue to create jobs and opportunities for the population.

Specifically, the scope of services for the overall project includes:

- A comprehensive and holistic assessment of key forces driving the economy and its shifting dynamics;
- An Assets and Challenges Assessment (A&C) of the county from the perspective of a site-location consultant that facilitates investment decisions;
- Recommendations for business targets suitable for the Commission to pursue based on our research and analysis; and finally,
- A set of implementable recommendations that the leadership in the county can utilize to enhance the economic well-being of the area and make the county a desirable business location and sustain and enhance its quality of place.

This Competitive Realities Report (CRR) is the first of two reports that will be provided to the Commission. It documents the work of the first two elements of the project scope and summarizes the findings of Phase I.

Methodology

The CRR is a compilation of local facts and data points with quantitative analysis and some subjective opinions noted in the Assets and Challenges Assessment. Together, the Assets and Challenges Assessment, Community Engagement Summary, and the Economic and Labor Analysis inform this process, upon which the final strategy report and its recommendations will be built.

This CRR offers no recommendations. The final strategy report will consist of the business target recommendations along with conclusions and recommendations for how the Commission and its partners can enhance its global competitiveness. (The final report will be presented in the late fall of 2017.)

PROJECT PHASES

PHASE I: DISCOVERY

Evaluate Conecuh County's competitive position from an economic development perspective:

- Demographic & economic analysis
- Labor market & cluster analysis
- Community Assets and Challenges Assessment (A&C)
- Compare Conecuh County to the state of Alabama and the nation

Publish the Competitive Realities Report (a summary of Phase I)

PHASES II AND III: STRATEGY AND IMPLEMENTATION RECOMMENDATIONS

- Business retention and growth
- Product improvement and community development for the area
- Entrepreneurship
- Business recruitment and marketing
- Workforce needs

Present the final report

Assets and Challenges Assessment

Our approach to creating the CRR began with the consulting team conducting an Assets and Challenges Assessment of the county. This was done through a windshield tour of the area and against a pre-determined list of 57 criteria used to evaluate the area from a site-selection perspective. Garner Economics assessed the county based on the qualities, elements, and infrastructure that a business will look for when considering the county as a place for its operations.

The assessment is both an objective and subjective evaluation of the area. We applied many of the same criteria to assess Conecuh County that we use when engaged by a corporate client to evaluate communities for possible investment. The assessment allows us to document challenges that exist in the county that constitute potential barriers for successful economic development to occur. By knowing what challenges or gaps exist, the county can take the steps necessary to mitigate the situation, strengthen its overall “product,” and be a more attractive business location. Likewise, by knowing its strengths, the county can better leverage them in its efforts to attract businesses.

The objectives of the Assets and Challenges Assessment are to:

- Help local leaders understand the county’s potential, so they can best develop realistic goals;
- Identify key strengths to emphasize in economic development marketing efforts; and
- Identify key weaknesses that may limit investment in the area, so remediation of these local challenges may occur.

Stakeholder Input

As a complement to the assessment of the physical and regulatory structure of the county against its benchmarked peers, Garner Economics conducted three focus groups. The purpose was to solicit a variety of perceptions of the county’s business climate and areas for improvement from key community stakeholders.

The following chapters describe our findings within a cohesive economic assessment of the region’s current state and economic potential. It sets the groundwork for developing strategies and recommendations to assist the Commission and Conecuh county in providing excellent economic development service delivery within the scope of its mission, which will be documented in the final report.

“Every town is after what we’re after.”

—Focus Group Participant

“Some think that only a few will benefit from economic growth. We all have to know that everyone will benefit if we are going to be successful.”

Chapter 1: Stakeholder Input



On August 16, 2017, Garner Economics held three focus group sessions with community leaders in Conecuh County to solicit their perceptions and opinions of the county's business climate and economic competitiveness on behalf of the County Commissioners. Garner Economics has been engaged by

the county to develop an economic development strategy for Conecuh County. Garner Economics will use the input to build an economic development strategy to drive the area's economic development efforts in the coming years.

Forty-one people participated in the three groups. A list of the participants in the focus groups is included in Appendix A. The questions posed to the group and a more detailed summary of responses are included in Appendix B.

The following summarizes the key themes emerging from the discussions. (Note: the comments listed are specifically from focus group respondents. Garner Economics recognizes that they may not necessarily be statements of fact, but may be opinions or perceptions.)

Key Themes from Focus Groups

Among the focus groups, some key themes emerged:

Resistance to Change

During all three of the focus groups, the theme arose that some in the county are averse to change and participants lack confidence in government leaders to make positive change. Several participants noted that the effort to build a plan is a good start, but the county needs a mindset shift in the way it sells itself as a place for business. Two quotes sum up the sentiments well: "You can't change anything until you can

change some thinking" and "Conecuh County is its own worst enemy—we talk ourselves down more than we talk [ourselves] up."

Strengths and Weaknesses

When asked about the county's current strengths and, subsequently, about areas of opportunity, participants noted the county's location on I-65 and the rail lines that run through it. The groups also noted the proactive nature of the current County Commissioners and recent improvements in the K-12 system. In other conversations, the participants noted the airport and the Liberty Hill development as assets. Conversely, other participants were negative about the public school system, so a disparity of opinions exists.

The participants pointed to the lack of workforce availability, lack of tax base to improve the county's product (and hence strengthen its business climate), and a resistance to change as weaknesses of the area.

When asked about the county's infrastructure, participants noted that the county is fortunate to have CSX rail service passing through and also pointed to the airport. Participants noted that broadband service is lacking in the county and that they would like to see more soft amenities like parks and gathering places that define the county.

Asked about current programs or assets that set the county apart, participants suggested that the work to create the magnet school and efforts to develop the Liberty Hill project set Conecuh County apart.

Business Climate

When asked to rank the county's business climate on a scale from 1-5, with 5 being the strongest, participants ranked Conecuh County as average, at 3.13. There were a few participants who ranked the county above average, while most ranked the county average or slightly below average. Business climate was defined as those policies and laws enacted by the local government that impact local businesses.

Those scoring the county lower than average commented that the towns and county still seem to work in silos, and the county lacks someone to “sell” it as a business location. Those who scored the county high noted the proactive nature of the current County Commissioners.

Labor

When asked to comment on the current labor situation in the county, participants noted that there is a “brain drain” (an exodus of children who graduate high school), and they have a difficult time getting people to move back to the county after graduation. Much conversation also centered around the high level of government public assistance programs in the county and the perception that it is often more lucrative to be on welfare programs than to look for employment. The participants noted that Reid State Community College has produced workers with basic trade skills. Others also suggested that workers who remained in the county after the closing of legacy industries are also a potential trained workforce.

When speaking about the county’s workforce, several participants also noted that some residents do not mind commuting to their jobs because they enjoy living in a rural area; others suggested that much of the workforce would stay in the county if jobs were available for them.

Potential Industries for Conecuh County

When asked what industry sectors would be a good fit for the county, participants suggested anything timber-related, agriculture-related, oil and gas, anything that can leverage the access to Interstate-65 and the county’s proximity to the Gulf Coast and Montgomery, and industries that could take advantage of basic trades.

Initiatives to Emulate and Future Economic Development Goals

When asked what programs they have seen in other areas around the country or globe that should be attempted in the county, participants noted the need for Conecuh County to be more proactive and to take care of the companies already there. Examples given reflected communities that built their downtown/historic/unique aspects and ones that were proactive in building a tax base that could resource either incentives or enhancements to the communities.

Within the general discussions on the work of the various economic development groups in the county, participants reiterated the need for the county overall to change to a “can do” mindset rather than looking for reasons things will fail. There was also a discussion that all the parties don’t communicate and “play well” with each other.

“Conecuh County is its own worst enemy—we talk ourselves down more than we talk [ourselves] up.”
— Focus Group Participant

“You can’t change anything until you can change some thinking.”
—Focus Group Participant

Chapter 2: Assets and Challenges Assessment



Conecuh County offers a unique mix of assets for businesses that are contemplating relocation or expansion. In conducting the Assets and Challenges Assessment, we employed the same criteria and methodology we use when conducting a community evaluation for our corporate clients to explore and identify locations for investment. By understanding the county's assets and challenges from a location strategy perspective, we believe that the county will be better positioned to compete more effectively and to resolve area challenges that are likely inhibitors to investment projects. By recognizing and understanding the area's strengths and opportunities, the county will ultimately be able to determine the proper target audience of companies to which it should effectively communicate the area's assets.

Garner Economics analyzed 57 community factors as part of the assessment. Ratings were identified by evaluating the county's position for each of the factors against the state of Alabama and the United States.

We define a "neutral" rating as normal in the realm of economic development opportunity and competitiveness. An "asset" rating indicates a positive feature of the county that would be evaluated and rated as a competitive strength versus the benchmark locations. A "challenge" rating identifies a factor that is considered a relative deficiency compared to other locations, which should be addressed with future remediation and may be an impediment to economic development if not resolved over time.

Of the 57 variables analyzed, 21 are considered an asset and 17 a challenge (19 rated as neutral). With 19 variables rated as a challenge, any or all of these rankings, taken either individually or as a whole, could be an impediment to attract or retain private investment within the county. The objective in the future will be for those policymakers engaged in local economic development to move the bar from a challenge to a neutral or asset ranking, and to sustain or prevent a slippage of the current neutral and asset rankings that you have today.

To enable a summary overview of the report's main findings for readers, a set of dashboard icons is presented. Each finding has an accompanying icon to assist with interpretation. Readers are encouraged to review the supporting data to gain a more complete understanding in those areas of interest in the full report.

Data sources and rationale for the rankings can be found in Appendix C.

REPORT DASHBOARD



Indicates the county is better (more positive) compared to a majority of the benchmark geographies or points to a positive trend or asset within the area.



Indicates the county is neutral or normal, neither positive nor negative. Indicator may represent a middle of the benchmark geographies.



Indicates the county is worse compared to a majority of the benchmark geographies or points to a negative trend or challenge within the area.

Access to Markets

Of the nine variables rated within this category, four are considered an asset, with the county's enviable position of having I-65 run north/south through it. Additionally, Conecuh is within a day's drive to nearly 63 million people, making it a great location for national and regional distribution operations. Broadband availability and speeds, especially in the rural areas, make it a challenge for businesses and individuals to operate effectively in the age of the internet.

Attribute	Rank
Centrally located for major regional market	 1
Centrally located for national market	
Well positioned to serve international markets	
Interstate highways	 2
Rail service	 3
Port facilities (inland and/or water)	
Within one hour of commercial air passenger service	 4
General aviation airport capable of handling corporate aircraft	 5
Broadband availability and speeds	 6

Labor

In many aspects, labor is a strength for Conecuh. The county has a high location quotient^a in the areas of skilled industrial workers and transportation and warehousing workers. The cost of labor is below both the U.S. and state averages; the availability of post-secondary training and the availability of low- and no-cost on-the-job training assistance makes labor a strength in Conecuh County. Challenges include limited availability of managerial personnel, more than a half-hour drive to a major university or college, and no degreed engineering program nearby.

Attribute	Rank
Availability of skilled industrial workers	 7
Availability of transportation and warehousing workers	 8
Availability of admin personnel	 9
Availability of managerial personnel	 10
Cost of labor	 11
Availability of post-secondary vocational training	 12
Availability of on-the-job training assistance	 13
Within half-hour of major university/college	
Availability of degreed engineering program	

Access to Resources

Conecuh County is resource-rich. It produces 49 percent of the state's oil and gas production with 140 active or producing wells. Forestry and logging is a strong sector in Conecuh with very high location quotients. As a result of the work in the *Timber* industry sector, *Manufacturing* has a strong location quotient. Challenges include a lack of business and professional services, where many existing employers must acquire professional services from larger cities.

Attribute	Rank
Availability of agricultural products for food processing	 14
Availability of minerals and forestry products	 15
Availability of manufacturing processes	 16
Availability of business and professional services	 17
Availability of water and wastewater to industrial and commercial sites	 18

^a Location quotient (LQ) is a valuable way of quantifying how concentrated a particular industry, cluster, occupation, or demographic group is in a region as compared to the nation. It can reveal what makes a particular region "unique" in comparison to the national average.

County Economic Development Program

The ability to implement and execute a strategy is paramount when pursuing a proactive and effective economic development strategy. The county does not have a formalized economic development service delivery mechanism because they have no economic development staff. As a result, this section received several challenge ratings. However, the County Commission itself has not been complacent and has stepped up and provided leadership to acquire property or fund initiatives for economic development opportunities.

Attribute	Rank
Adequate level of professional staff	↓
Involvement of both public and private sectors	↓
Local economic development organization has a strategic plan	↓
Level of leadership support of economic development program	↔
Level of cooperation between various organizations involved in economic development activity	↔
Level of awareness of community regarding economic development	↔
Level of funding for local economic development program	↓

Access to Space

The Economic Development Partnership of Alabama (EDPA) lists several Conecuh properties on its website, including one Advantage Site^b (Fairview Commons). The Advantage Site meets a set of criteria to show that the site is shovel-ready for industry based on most companies seeking a quick turnaround for speed to market. In aggregate, EDPA lists eight available sites in the county with aggregate acreage totaling 2,260 acres. Office and commercial sites include the Liberty Hill development off I-65.

Attribute	Rank
Availability of fully served and attractive industrial sites	↑ ¹⁹
Availability of fully served and attractive office/commercial sites	↑ ²⁰

Access to Capital

The county does have the ability to issue industrial revenue/development bonds to help finance qualified and acceptable projects. However, the ability to acquire low-interest loans for small businesses, other than from conventional banking sources, and the lack of venture capital for startups or early-stage companies is considered a challenge.

Attribute	Rank
Availability of tax-exempt financing for new industrial facilities	↔
Availability of low-interest loans for small business	↓
Availability of venture capital from local sources for business startups or early-stage funding	↓

^b <http://www.edpa.org/about-us/advantagesite/>

Government Impact on Business

Of the nine variables ranked within this section, six are considered an asset and include availability and capacity of water and wastewater treatment, water and sewer availability to industrial and commercial sites, the availability of local incentives, labor training incentives, county business permitting procedures and local property taxes. The only item listed as a challenge are low ACT test scores.

Attribute	Rank
Availability/capacity of water and wastewater treatment	
Availability of adequate water and sewer lines to industrial sites	
Condition and maintenance of local streets	
Availability and type of local incentives	
Availability of labor training incentives	
ACT test scores	 21
Quality of post-secondary education	
Business permitting procedures and costs	 22
Local property taxes	 23

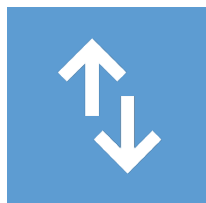
Quality of Place

A community's quality of place is a key consideration when trying to recruit or retain investment. The ability to attract people and keep them is important, as it allows the county to grow the area's workforce, allows for more retail options, enhances the community's tax base, and allows for more philanthropic contributions. Of the 13 variables ranked in this section, only one, the cost of housing, is listed as an asset. Six are listed as neutral and six as a challenge. Challenges include limited executive-level housing; apartment rentals; cultural and recreational opportunities; lack of major shopping facilities; and no AAA highly rated hotels, motels, or resorts. The community must invest in quality of place to enhance the quality of life of Conecuh citizens and future residents.

Attribute	Rank
Availability of executive-level housing	 24
Availability of moderate-cost housing	 25
Availability of apartments	 26
Cost of housing	 27
Level of crime	 28
Level of cultural activity	 29
Availability of recreational opportunities	
General appearance of the community	
Availability of major shopping facilities	
Availability of adequate medical facilities	 30
Availability of first-class hotels, motels, and resorts	
Quality of local restaurants	
Appearance of the Central Business District(s)	 31



Chapter 3: Dashboard Indicators Summary



The following analysis examines the economic position and competitiveness of Conecuh County, Alabama, a county situated between the cities of Montgomery and Mobile. This report shows demographic and economic trends in Conecuh County and examines the economy of the area. Most of the information summarized here is reported at the county level; some items are also reported at the city (Evergreen) or metropolitan area level.

For context, this report compares Conecuh County to itself over time, the state of Alabama, and the nation for benchmarking.

This analysis relies heavily on raw objective data collected by governmental or impartial third-party agencies. In all cases, the original and most current available data as of July 2017 are used. Garner Economics conducted all unique calculations and computations from the original data and will gladly share methodology with clients upon request.

Measurements:

- Population Trends
- Age Distribution
- Race and Hispanic Origin
- New Residents
- Educational Attainment
- Secondary School Performance
- Household Income
- Individual Earnings
- Per Capita Income
- Poverty
- Crime Rate
- Cost of Living
- Labor Force Draw
- Labor Force Participation
- Commuting Patterns
- Major Industry Sector Composition
- Estimated Average Annual Wage
- Self-Employment
- Agriculture
- Broadband (average speed, access)
- Retail Demand & Leakage
- Major Industry Sector Change
- Industry Earnings
- Occupational Change
- Occupational Earnings
- Industry & Occupational Local Specialization, Competitiveness & Growth



Demographic & Community Trends

Population Change		Conecuh County, Alabama, has a current population of 12,395, a decline of 1,208 persons over the past decade, or an 8.9 percent drop. The constant decline points to a concerning situation, and components of population change point to a combined effect of natural decrease and out-migration.
Age Distribution		Conecuh County is showing growth from 2011 to 2016 in ages 75 to 79 and is following the national trend of an aging population. The county has the highest percentage of age groups over 50 years old compared to benchmarks.
		There is growth in the 25- to 29-year-old group; however, the core of workforce age population, 20- to 59- years-old, is only 40 percent of the entire population.
		Median age for Conecuh County is 44.5—the oldest compared to Alabama and the nation.
New Residents		Conecuh County gained a little over 200 new residents, or 1.5 percent of the population. This is behind the state and nation and is not enough to stem natural and out-migration effects.
		Fifty percent of new residents in Conecuh County have attended <i>Some College</i> or have an <i>Associate Degree</i> .
Educational Attainment		Conecuh County is behind the state and nation regarding post-secondary educational attainment. Forty-four percent of the population aged 25 and older have completed <i>High School</i> with no additional education. Fifteen percent have earned an <i>Associate</i> through <i>Graduate or Professional Degree</i> .
Secondary School Performance		ACT measures of college readiness show that Conecuh County is far below state and national achievement against these standardized benchmarks.
		The four-year graduation rate in Conecuh County had been higher or equal to the state and national rates for three years, beginning in the 2010–11 school year; however, the county slid below the benchmarks over the past two years (where statistics were available). An increase from the 2013-14 school year over the 2014-15 school year, making Conecuh on par with the national graduation rate, is a positive trend.
Household Income		Median household income of \$24,900 is well under the state (\$43,623) and national (\$53,889) income levels. Conecuh County had the highest percentage of households earning less than \$35,000 annually.
Individual		Individual workers ages 16 and up earn an average of \$39,330. Higher than the median household income, the amount is still under the average income of the state and nation.



Demographic & Community Trends, *continued*

Public Assistance		In 2015, Conecuh County had 28 percent of households receiving assistance, an amount significantly higher than Alabama and the United States. The county's percentage of households receiving assistance rose 10 percent from 2010 to 2015, a more rapid increase than the state (5 percent increase) and the nation (4 percent increase).
Per Capita Income		Per capita income is \$15,968 compared to \$24,091 for Alabama and \$28,930 at the national level.
Poverty		Conecuh County has a high rate of poverty for its population at 33.8 percent <i>Below the Poverty Level</i> . <i>Children under 18 below the Poverty Level</i> is at 41.5 percent.
Crime		Conecuh County has the lowest property crime rate (154.3 incidents per 10,000 residents). The county has a violent crime rate of 44 reported incidents per 10,000 residents, which is above the national level but under Alabama's 47.2 rate.
Cost of Living		Evergreen, the closest cost-of-living geography available, has a very low cost of living, with a composite index of 82 compared to the nation benchmark of 100. At 43, housing costs were extremely low for the community.

Labor Market Analysis & Employment Trends

Labor Force Participation		Among residents ages 16 and over in Conecuh County, 46.7 percent are in the labor force, less than Alabama (58.3 percent) and the United States (63.7). Conecuh County has only 19.8 percent of families with two income earners—lower than the state and nation. Conversely, there are 21.2 percent of all married couple families with neither in the labor force in the county.
Labor Draw		Within a 45-minute drive time, the labor force is estimated to be nearly 34,000, which greatly enhances the existing labor force of 4,593 in the county.
College Enrollment & Degrees Granted		There are four community and technical colleges within 45 minutes of Evergreen. Undergraduate enrollment in these institutions is more than 6,600. Collectively, there were 1,137 associate degrees or professional certificates granted to students in the 2015–2016 school year.



Labor Market Analysis & Employment Trends, *continued*

Commuting Patterns		Conecuh County has a net loss of 1,526 workers, with 72 percent of employed residents leaving the county for work. In-commuters number 1,801, and 1,303 residents stay in the county. In 2014, 38 percent of Conecuh County employed residents traveled greater than 50 miles for work.
Major Industry Composition		The county's employment base is diversified with the highest sector of employment being the <i>Government</i>, at 20.6 percent of all employment. <i>Transportation & Warehousing</i> and <i>Manufacturing</i> both claim 15 percent of the employment base in the county.
Average Wage		The average wage of Conecuh County's workers—regardless of where they live—is \$33,118. This is in contrast to the individual earnings of residents (\$39,330). Wages have grown over the past decade; however, the growth does not keep up with state and national levels when adjusted for inflation.
Self-Employment		Self-employment in Conecuh County is 10.8 percent with 9.1 percent of those working as <i>Not Incorporated & Unpaid Family Workers</i>. Self-employment occurred in several main categories including <i>Professional, Construction, Services, and Natural Resources</i>.
Agriculture		Farms in Conecuh County have increased acreage and increased the value of agricultural products sold from 2007 to 2012. Average sales per farm have also increased. Top <i>Crop & Animal Products</i> for Conecuh are <i>Poultry & Eggs, Cotton, Cattle, and Other Crops & Hay</i>.
Broadband		Households and businesses in Conecuh County have limited access to adequate broadband service. Only 31.7 percent of the county has access to service 25 mbps or faster.



Local Specialization, Competitiveness & Growth

Below are general observations from an in-depth analysis of industry sectors and occupational groups in Conecuh County. This information is not benchmarked.

Employment Change	✓ Over the last five years, Conecuh County grew by 259 jobs or 7.1 percent. With a total of 3,883 jobs in the county, this positive 5-year change marks a slow recovery from 2011 employment levels.
Major Industry Sector Change	✓ The largest absolute industry job gains in Conecuh County came from <i>Transportation & Warehousing</i>, up 154 jobs or 35 percent. ✓ The highest percentage change occurred in <i>Wholesale Trade</i>, growing 289 percent, from an employment of 41 in 2011 to 158 jobs in 2016. ✓ Other gains were made in <i>Accommodation & Food Services</i> (73 jobs/26.9 percent); <i>Manufacturing</i> (43 jobs/8 percent); <i>Administrative, Support, Waste Management & Remediation Services</i> (13 jobs/13 percent); <i>Educational Services</i> (6 jobs/17 percent); and <i>Utilities</i> (4 jobs/23 percent). ✓ Eight sectors in the county lost jobs, including <i>Government</i> (-54 jobs/6.4 percent), <i>Crop & Animal Production</i> (-47 jobs/20 percent), and <i>Health Care & Social Assistance</i> (-22 jobs/5.6 percent). The other 5 sectors lost 12 or fewer jobs during the past 5 years; however, with a job loss of 8, the <i>Finance & Insurance</i> sector decreased 14.8 percent.
Industry Earnings	✓ In general, wages were below the Alabama and United States averages—except for <i>Crop & Animal Production</i>, which was 22 percent higher than the state and 30 percent higher than the nation. ✓ Four industry sectors in Conecuh County have wages 60 percent or more below the national average: <i>Utilities</i> (64 percent lower); <i>Professional, Scientific & Technical Services</i> (60 percent lower); <i>Finance & Insurance</i> (61 percent lower); and <i>Information</i> (62 percent lower). ✓ The <i>All Industry</i> average salary for Conecuh County is 35 percent under the national average wage and 23 percent under the state average wage.
Major Occupational Change	✓ Over the last 5 years, the top occupations with absolute job gains in Conecuh County were in <i>Transportation & Material Moving</i>, up 162 jobs or 28.9 percent and <i>Food Preparation & Serving Related</i>, up 74 jobs or 28.2 percent. ✓ Gains were also seen in <i>Production</i> (40 jobs/10.6 percent) and <i>Sales</i> (19 jobs/6.7 percent). ✓ The greatest job losses were in the occupational areas of <i>Education, Training & Library</i> (-35 jobs/12.7 percent); <i>Farming, Fishing & Forestry</i> (-25 jobs/17.9 percent); and <i>Healthcare Support</i> (-20 jobs/24 percent)



Local Specialization, Competitiveness & Growth, *continued*

Occupational Earnings	✓ Two occupations were higher than the national median: <i>Farming, Fishing & Forestry</i> and <i>Military</i>. The <i>Farming</i> median hourly wage was 34.4 percent higher than the United States and 17 percent higher than Alabama. <i>Military</i> occupations paid a median wage 14.4 percent higher than the national median. ✓ Several other occupations ranked higher than the Alabama median wage rate: <i>Transportation & Material Moving</i> (6.9 percent higher) and <i>Education, Training & Library</i> (.5 percent higher). ✓ The median wage for all occupations in Conecuh County was \$15.65 compared to \$18.62 for the Alabama median wage and \$20.78 for the national median. Conecuh County's median wage is 15.9 percent lower than Alabama and 24.7 percent lower than the United States.
Major Industry Sector Specialization & Growth	✓ There are five industry sectors with a level of local specialization above 1.0 that grew in the last five years, comprising sectors in the <i>Competitive</i> category: • <i>Transportation & Warehousing</i> (LQ of 4.47) • <i>Wholesale Trade</i> (LQ of 1.07) • <i>Accommodation & Food Services</i> (LQ of 1.04) • <i>Manufacturing</i> (LQ of 1.89) • <i>Utilities</i> (LQ of 1.45) ✓ There are three industry sectors in Conecuh County with a level of local specialization below 1.0, however; due to job growth, these industry sectors are classified as <i>Emerging</i>: <i>Administrative Support</i>; <i>Waste Management & Remediation Services</i>; <i>Mining, Quarrying, Oil & Gas Extraction</i>; and <i>Educational Services</i>. ✓ Several sectors have a high LQ; however, due to recent job losses, they are categorized <i>At-Risk</i>. The two sectors, <i>Crop and Animal Production</i> and <i>Government</i>, had LQs of 3.88 and 1.34 respectively. ✓ There are six industries <i>Declining</i> due to low local specialization and job loss.

Chapter 4: Demographic & Community Trends



This chapter focuses on the residents of Conecuh County, Alabama, exploring population demographics, migration trends, and sources of change in these communities offering a view of new residents. Income for households and individuals, per capita income, and poverty rates are key indicators of residents' economic standing. Included in this chapter are several indicators affecting residents' quality of life and opportunity, such as crime rates and cost of living.

Population Trends

Population growth can be a significant factor in local economic health and is often a key consideration in business expansion and site-selection decisions. Most firms are wary of areas with population declines, very slow growth rates, or significant amounts of domestic out-migration.

Conecuh County, Alabama, has a current population of 12,395, a decline of 1,208 persons over the past decade, or an 8.9 percent drop (Figures 4.1 & 4.2 and Table 4.1). In comparison, Alabama grew 5.1 percent and the United States grew 8.3 percent.

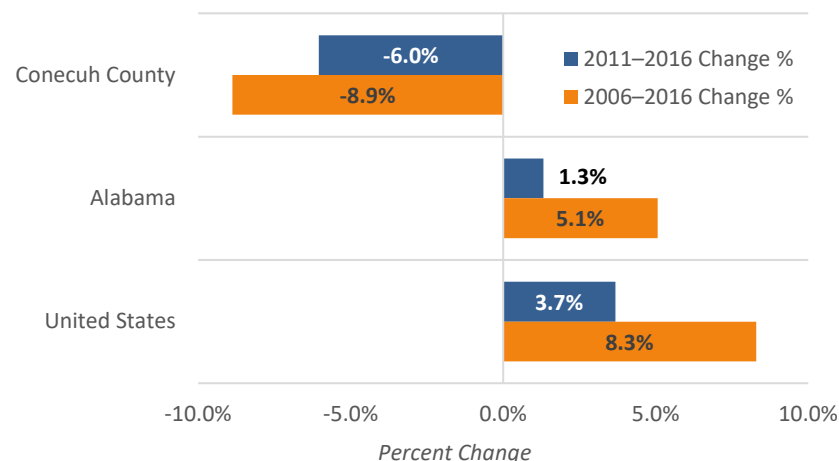
Since 2011, Conecuh County experienced an annual average decline of 1.1 percent compared to 0.3 percent for the state and 0.7 percent for the nation (Table 4.2). The United States and Alabama showed a more gradual slowing of population growth (Figure 4.3). Conecuh County's population is smaller and most changes appear drastic in comparison to the benchmarks.

The constant decline illustrated in Figure 4.2 still points to a concerning situation. The components of population change point to a combined effect of natural decrease and out-migration with 2015 being the only year with positive net migration (Figure 4.4).

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Figure 4.1
Net Population Change



Source: U.S. Census Bureau Population Estimates, Garner Economics



Table 4.1
Net Population Change
(Highest Relative Figure Shaded)

	2016 Population	2011–2016 Change		2006–2016 Change	
		#	%	#	%
Conecuh County	12,395	-798	-6.0%	-1,208	-8.9%
Alabama	4,863,300	63,382	1.3%	234,319	5.1%
United States	323,127,513	11,464,155	3.7%	24,747,601	8.3%

Source: U.S. Census Bureau Population Estimates, Garner Economics

Table 4.2
Average Annual Growth Rate
(Highest Relative Figure Shaded)

	5-Year	10-Year
Conecuh County	-1.1%	-0.7%
Alabama	0.3%	0.6%
United States	0.7%	0.8%

Source: U.S. Census Bureau Population Estimates, Garner Economics

Figure 4.2
2006–2016 Conecuh County Population

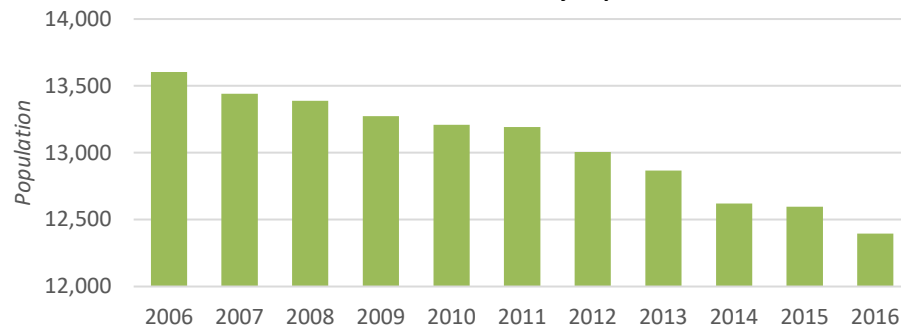


Figure 4.3
2006–2016 Annual Rate of Population Change

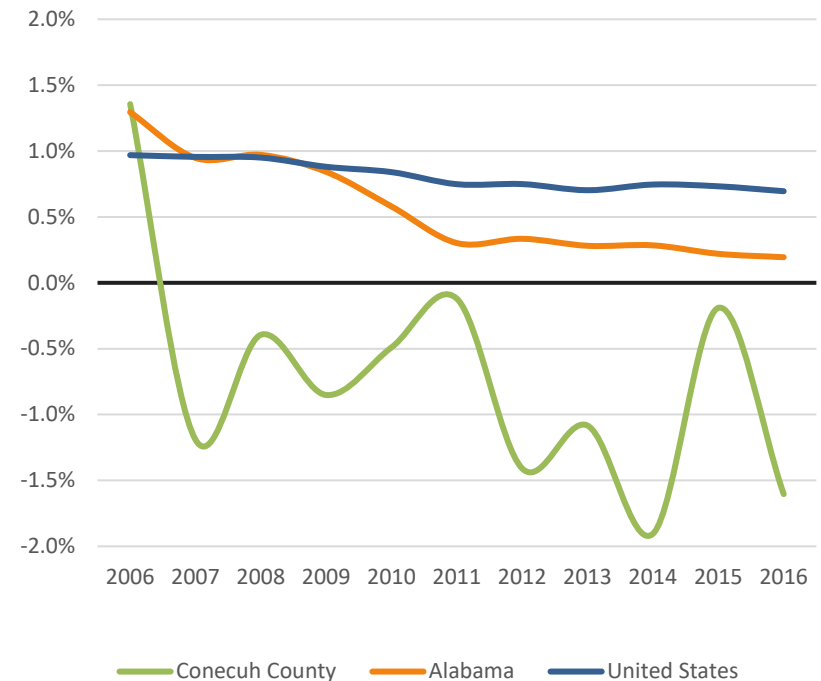
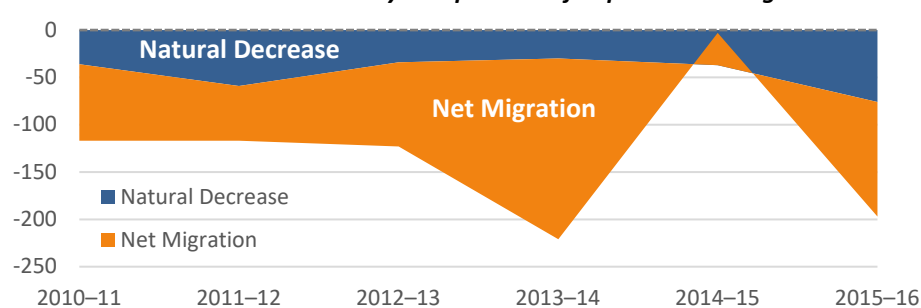


Figure 4.4
2011–2016 Conecuh County Components of Population Change



Source: U.S. Census Bureau Population Estimates, Garner Economics

Age Distribution

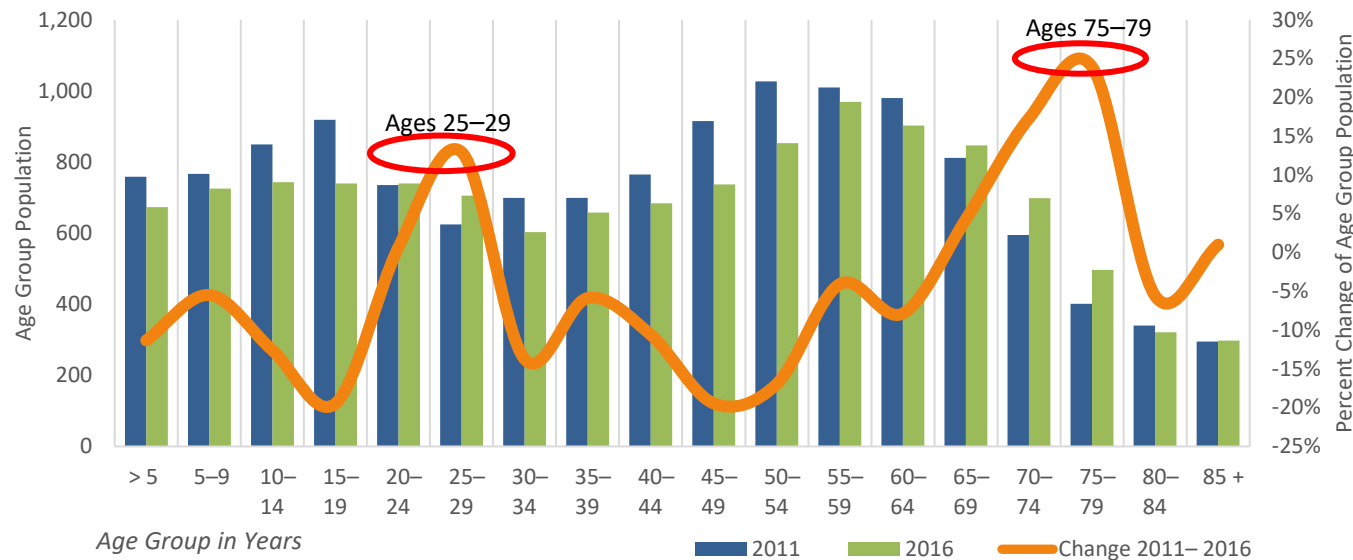
The age composition of a local population can be an important determinant in business decisions and competitiveness. The lack or underrepresentation of younger workers may deter firms from considering some communities for their long-term plans. Low proportions of middle-aged workers may prevent firms from initiating expansions requiring quick startup operations. A high proportion of older workers may indicate certain incumbent skills or the need to replace soon-to-retire workers.

Conecuh County is showing growth from 2011 to 2016 in two age groupings: the 25- to 29-year-olds and ages 75 to 79 (Figure 4.5). Median

age for Conecuh County is 44.5 and the oldest compared to Alabama and the nation (Table 4.3).

Conecuh County is following national trends of an aging population, having the highest percent of age groups over 50 years old compared to benchmarks (Table 4.4, Figure 4.6). This trend is more pronounced in the county with 37 percent of the population over 60 years old (Figure 4.7). The core of workforce age population, 20 to 59 years old, is only 40 percent of the entire population in Conecuh County.

Figure 4.5
2011–2016 Age Group Change in Conecuh County



Source: U.S. Census Bureau Population Estimates, Garner Economics

Table 4.3
2016 Median Age
Oldest Median Age Underlined;
(Youngest Median Age Green)

44.5
Conecuh County

38.9
Alabama

37.9
United States

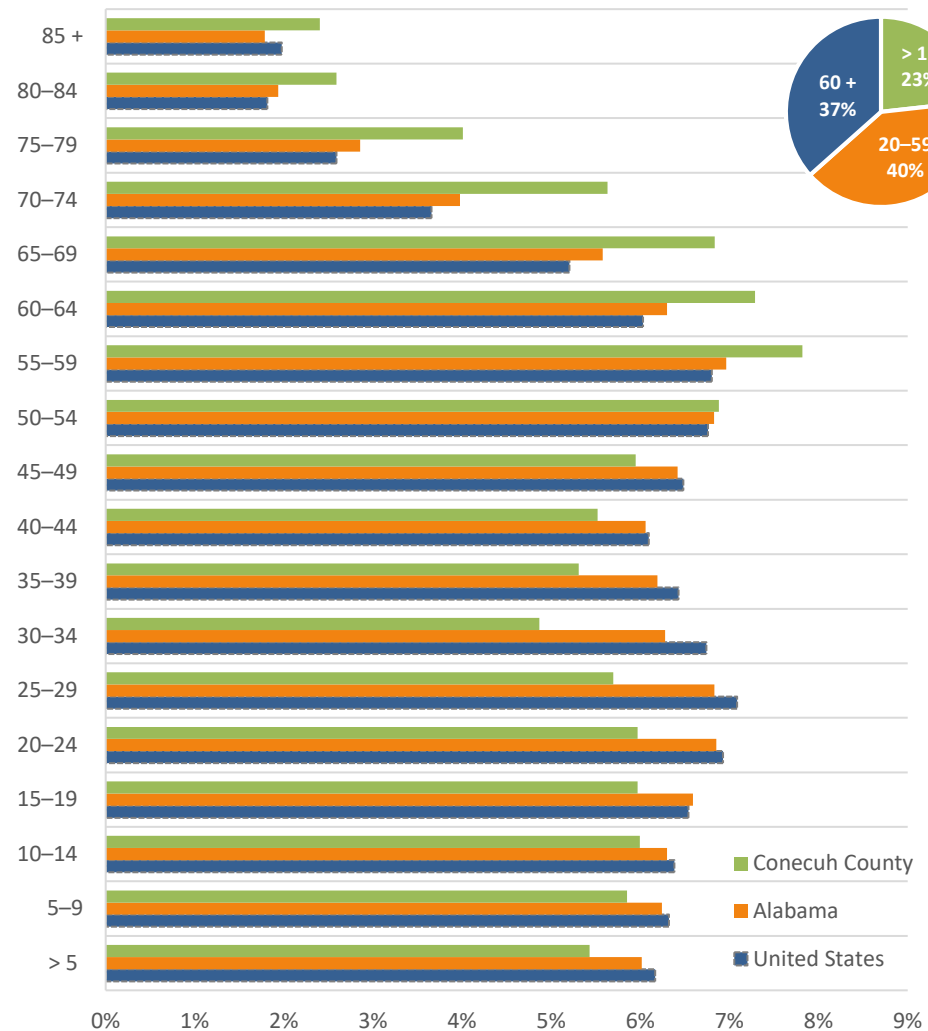
Source: U.S. Census Bureau Population Estimates,
Garner Economics

Table 4.4
2016 Population by Age Groups
(Highest Relative Figure Shaded)

	Conecuh County		Alabama	United States
	#	%		
> 5	673	5.4%	6.0%	6.2%
5–9	725	5.8%	6.2%	6.3%
10–14	743	6.0%	6.3%	6.4%
15–19	740	6.0%	6.6%	6.5%
20–24	740	6.0%	6.9%	6.9%
25–29	706	5.7%	6.8%	7.1%
30–34	603	4.9%	6.3%	6.7%
35–39	658	5.3%	6.2%	6.4%
40–44	684	5.5%	6.1%	6.1%
45–49	737	5.9%	6.4%	6.5%
50–54	853	6.9%	6.8%	6.8%
55–59	969	7.8%	7.0%	6.8%
60–64	903	7.3%	6.3%	6.0%
65–69	847	6.8%	5.6%	5.2%
70–74	698	5.6%	4.0%	3.7%
75–79	497	4.0%	2.9%	2.6%
80–84	321	2.6%	1.9%	1.8%
85 +	298	2.4%	1.8%	2.0%

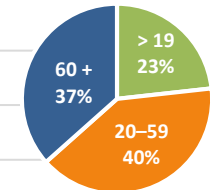
Source: U.S. Census Bureau Population Estimates, Garner Economics

Figure 4.6
2016 Population by Age Groups



Source: U.S. Census Bureau Population Estimates, Garner Economics

Figure 4.7
Conecuh County
Age Distribution



Race & Hispanic Origin

By itself, racial diversity is not a determining factor in local economic competitiveness, although some firms may prefer higher rates of diversity to attract and retain certain workers. This is particularly true for multinational firms looking to attract workers from outside the United States.

Conecuh County is primarily comprised of those who identify themselves as *White* or *Black or African American*. Compared to the state and nation, Conecuh County has the highest percentage of *Black or African American* people (Table 4.5).

Table 4.5
2016 Race & Hispanic Origin by Percentage of Total Population
(Highest Relative Figure Shaded)

	Conecuh County	Alabama	United States
White	51.3%	69.3%	76.9%
Black or African American	46.8%	26.8%	13.3%
American Indian & Alaska Native	0.4%	0.7%	1.3%
Asian	0.2%	1.4%	5.7%
Native Hawaiian & Other Pacific Islander	0.03%	0.10%	0.24%
Two or More Races	1.3%	1.6%	2.6%
Hispanic Origin	2.0%	4.2%	17.8%

Source: U.S. Census Bureau American Community Survey, Garner Economics

New Residents

Attracting new residents from a diversity of outside locations can reflect a community's broader appeal and provide an indicator of economic dynamism.

Conecuh County has experienced a net decline in population; however, 1.5 percent of its total population migrated from outside of the county. Approximately 200 new residents were estimated to have moved to the County one year earlier. Slightly more than 1 percent of the county's population moved from a different county within Alabama and .4 percent moved from a different state (Table 4.6, Figure 4.6). Conecuh County is well below the state and nation for attracting new residents.

Median ages of Conecuh County new residents varied greatly between those who moved from within Alabama (29.1 years) and the small percentage who moved from outside the state (53.4). Both median ages were older than those of the state and nation (Table 4.5).

New residents for Conecuh County had a higher percentage of individuals who were in the *High School Graduate* and *Some College or Associate Degree* categories of education compared to the state and nation (Table 4.6, Figure 4.7).



Table 4.6
New Residents
Previous Location of Residents Who Had Moved One Year Earlier
(Highest Relative Figure Shaded and Youngest Relative Age in Green)

	Conecuh County	Alabama	United States
Different County, Same State	1.1%	3.2%	3.2%
Different State	0.4%	2.3%	2.3%
Abroad	-	0.3%	0.6%
Percent of Total Population Who are New Residents	1.5%	5.8%	6.1%
Median Age of New Residents			
Different County, Same State	29.1	26.8	27.1
Different State	53.4	27.6	27.9
Abroad	-	30.4	28.8
Educational Attainment of New Residents			
Less than High School Graduate	14.4%	15.6%	12.0%
High School Graduate	35.7%	27.0%	23.3%
Some College or Associate Degree	50.0%	29.5%	28.5%
Bachelor's Degree	-	17.7%	22.1%
Graduate or Professional Degree	-	10.5%	14.1%

Figure 4.8
Sources of New Residents
Previous Location of Residents Who Had Moved One Year Earlier

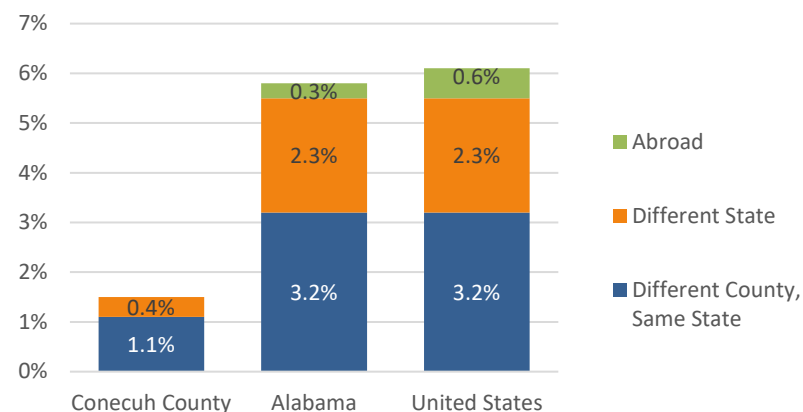
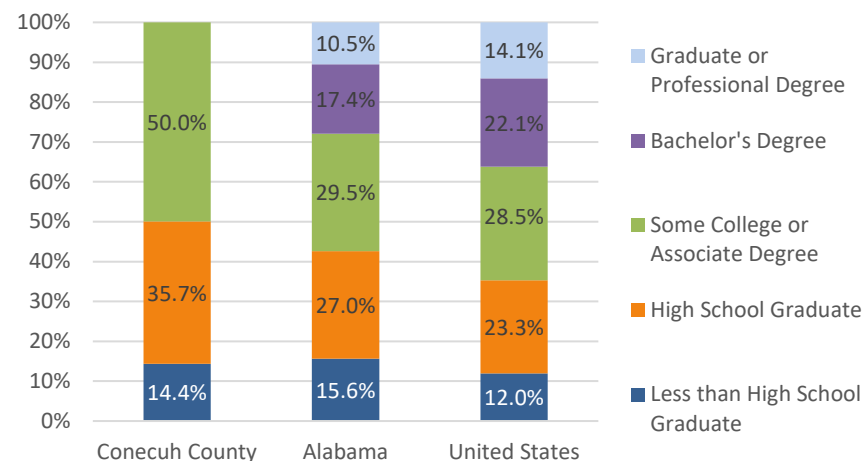


Figure 4.9
Educational Attainment of New Residents



Source: U.S. Census Bureau American Community Survey 2011–2015, 5-Year Average; Garner Economics

Educational Attainment

Increasingly, the level of education of a community's population is becoming a decisive factor in economic competitiveness. Firms understand the need to operate in economies that offer a sufficient supply of workers that meet or exceed their demands. They also know that the lack of an educated workforce can significantly affect business performance.

Conecuh County has the highest percentage of *High School Graduates* and those with *Less than High School Degrees* compared to the state and nation (Table 4.7, Figure 4.10). The county has 78.1 percent of residents ages 25 or older with at least a *High School Degree*. From *Associate* to *Graduate* level, 15.3 percent of Conecuh County residents hold *Post-Secondary School Degrees*.

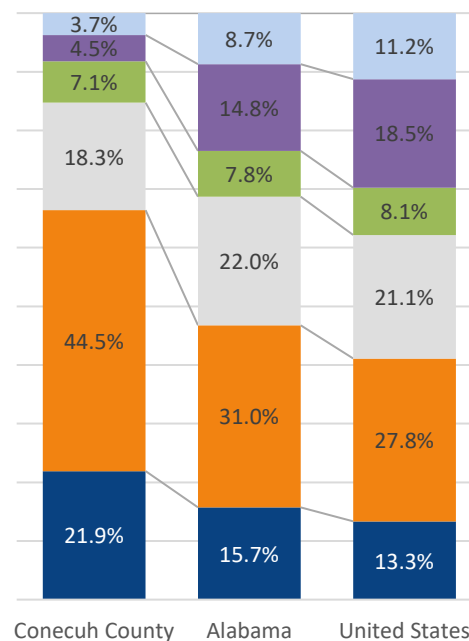
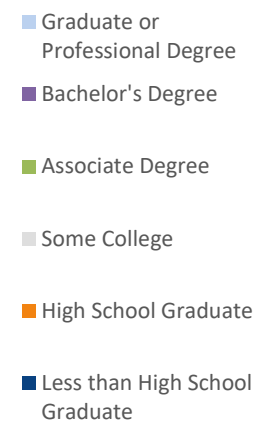
Table 4.7
Educational Attainment
Percentage Total Population Age 25+
(Highest Relative Figure Shaded)

	Conecuh County	Alabama	United States
Less than High School Degree	21.9%	15.7%	13.3%
High School Graduate	44.5%	31.0%	27.8%
Some College, No Degree	18.3%	22.0%	21.1%
Associate Degree	7.1%	7.8%	8.1%
Bachelor's Degree	4.5%	14.8%	18.5%
Graduate or Professional Degree	3.7%	8.7%	11.2%
High School Graduate and Above	78.1%	84.3%	86.7%
Post-Secondary Degree Holders	15.3%	31.3%	37.8%

Figure 4.10
Educational Attainment
Percentage Total Population Age 25+

15.3%

hold post-secondary degrees in Conecuh County



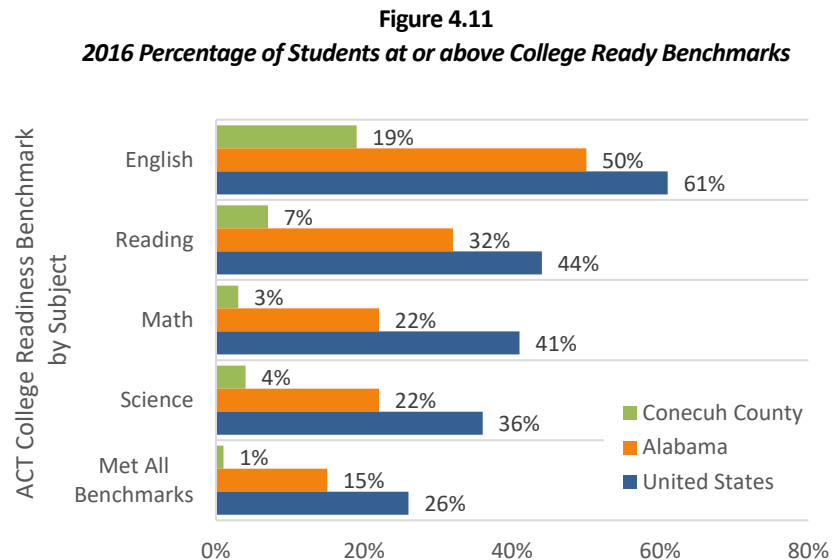
Source: U.S. Census Bureau American Community Survey 2011-2015, 5-Year Average; Garner Economics

Secondary School Performance

ACT Scores

The ACT exam is a standardized test for college admissions in the United States and is a widely accepted measure of education quality. These scores are especially relevant to businesses because they provide a measure of the “final product” of public schools and the educational quality. This measurement is for public schools only and does not cover private institutions. Alabama began statewide administration of the ACT, with all public high school juniors tested.

Recent focus has been on measuring the percentage of students that have met or exceeded College Ready Benchmarks as defined by the ACT organization. Conecuh County’s test scores exceeded each subject area of the ACT test; however, the percentage of students doing so were far below state and national levels (Figure 4.11).



Source: Public Affairs Research Council of Alabama, ACT 2016 Percent of Students at or above College-Ready Benchmarks; Garner Economics

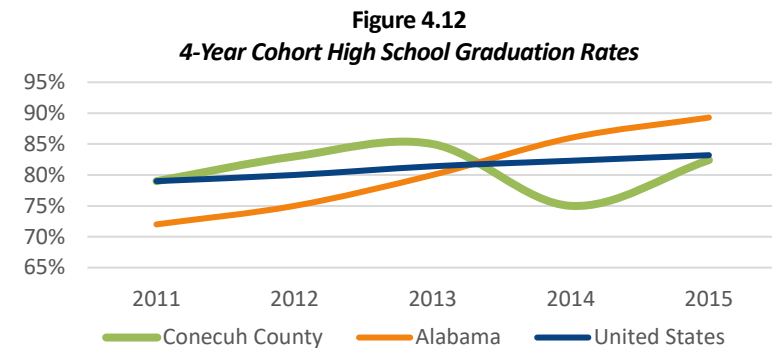
High School Graduation Rates

The share of high school students who graduate within four years of beginning 9th grade is another important measure of the performance of local school districts. The four-year graduation rate in Conecuh County had been higher or equal to the state and national rates for three years beginning in 2010–11; however, over the past two years where statistics were available, the county slid below the benchmarks (Table 4.8, Figure 4.12).

Table 4.8
4-Year Cohort High School Graduation Rates
(Highest Score Shaded)

School Year	Conecuh County	Alabama	United States
2010–11	79	72	79
2011–12	83	75	80
2012–13	85	80	81
2013–14	75	86	82
2014–15	82	89	83

Source: Alabama State Department of Education, Garner Economics (Table

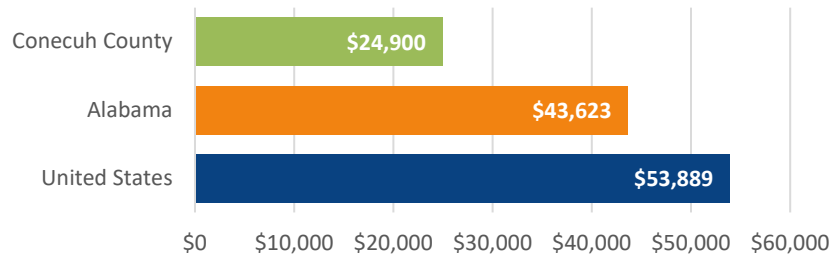


Source: Alabama State Department of Education, Garner Economics

Household Income

Household income reflects income for residents regardless of where they work. Conecuh County's median household income is \$24,900, well below Alabama and the United States (Figure 4.13). Conecuh County has the highest percentage of households with income \$34,999 or less compared to the state and the nation (Table 4.9, Figure 4.14).

Figure 4.13
Median Household Income



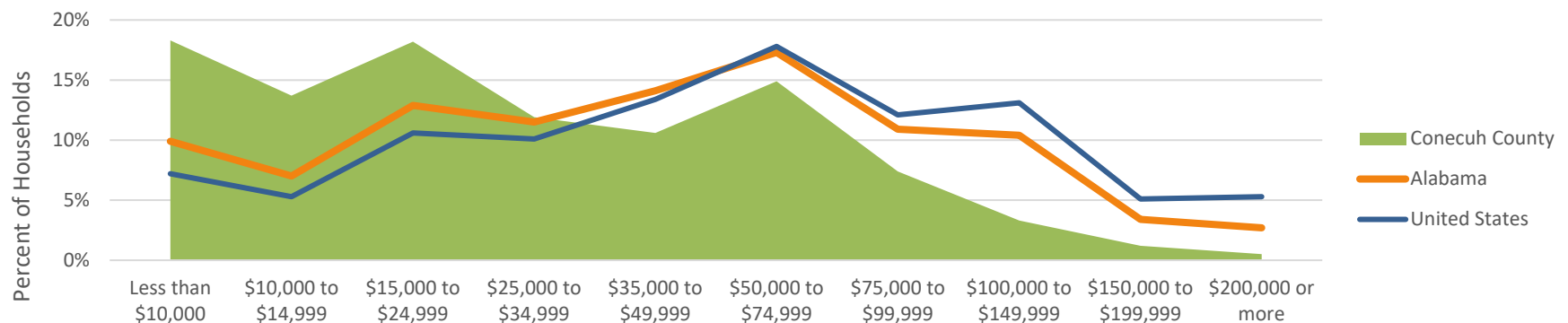
Source: U.S. Census Bureau American Community Survey 2011–2015, 5-Year Average; Garner Economics

Table 4.9
Household Income
(Highest Relative Figure Shaded)

	Conecuh County	Alabama	United States
Less than \$10,000	18.3%	9.9%	7.2%
\$10,000 to \$14,999	13.7%	7.0%	5.3%
\$15,000 to \$24,999	18.2%	12.9%	10.6%
\$25,000 to \$34,999	11.9%	11.5%	10.1%
\$35,000 to \$49,999	10.6%	14.1%	13.4%
\$50,000 to \$74,999	14.9%	17.3%	17.8%
\$75,000 to \$99,999	7.4%	10.9%	12.1%
\$100,000 to \$149,999	3.3%	10.4%	13.1%
\$150,000 to \$199,999	1.2%	3.4%	5.1%
\$200,000 or more	0.5%	2.7%	5.3%

Source: U.S. Census Bureau American Community Survey 2011–2015, 5-Year Average; Garner Economics

Figure 4.14
Household Income



Source: U.S. Census Bureau American Community Survey 2011–2015, 5-Year Average; Garner Economics

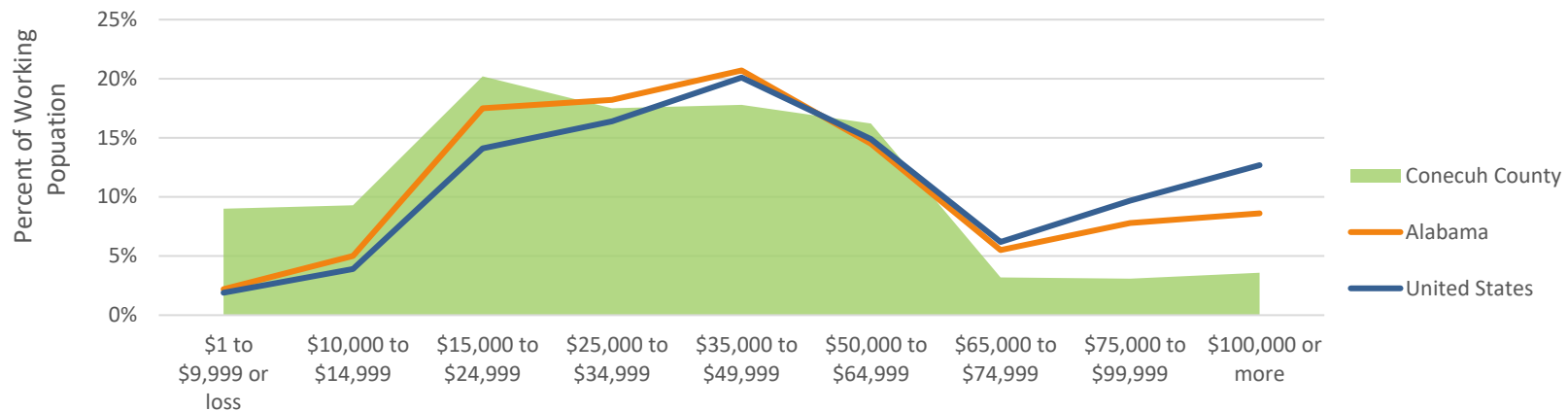
Individual Earnings

Earnings for individuals reflect the income for residents regardless of where they work or others' earnings in their household. The data captures individuals ages 16 or over who are full-time, year-round workers with earnings.

Similar to household income, Conecuh County has a lower average annual personal income than the state and nation (Table 4.10). Conecuh County

also has a larger percentage of individuals with income \$24,999 and under (Figure 4.15). Income levels between \$25,000 and \$64,999 are close to the Alabama and United States benchmarks, but individuals earning \$65,000 or more annually fall well below benchmarks.

Figure 4.15
Personal Income of Full-Time, Year-Round Workers



Source: U.S. Census Bureau American Community Survey 2011–2015, 5-Year Average; Garner Economics

Table 4.10
Average Individual Income: Full-Time, Year-Round Workers
(Highest Relative Figure in Green)

\$39,330
Conecuh County

\$51,000
Alabama

\$59,736
United States

Source: U.S. Census Bureau American Community Survey 2011–2015, 5-Year Average; Garner Economics

Public Assistance

Another gauge of economic health for a community is the amount of assistance residents receive from various programs. Public assistance through income and food stamps rose between 2010 and 2015 for all geographies studied (Table 4.11). Conecuh County had 28 percent of households receiving assistance in 2015, an amount significantly higher

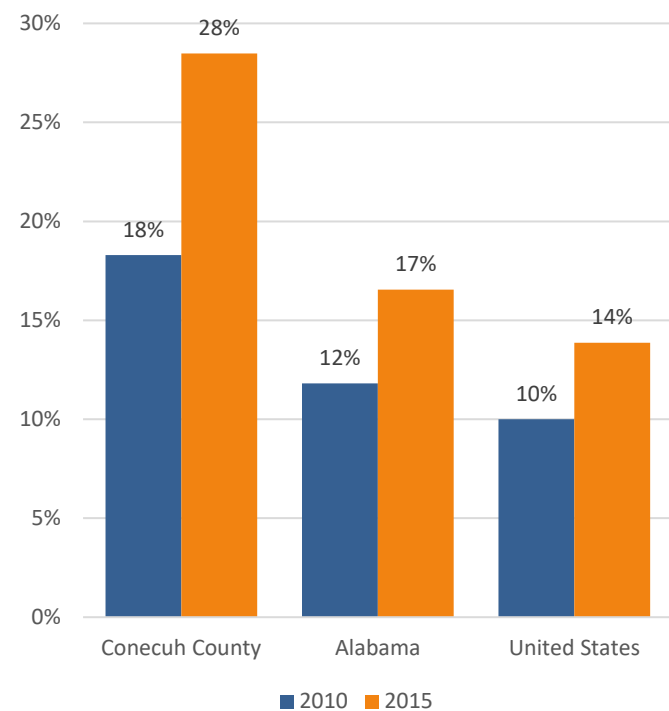
than Alabama and the United States. The county's percentage of households receiving assistance rose 10 percent, a more rapid increase than the state (5 percent increase) and the nation (4 percent increase) as shown in Figure 4.16.

Table 4.11
Households Receiving Public Assistance 2010–2015

	Conecuh County	Alabama	United States
2010			
Households	4,861	1,821,210	114,235,996
Households Receiving Public Assistance or Food Stamps	889	215,259	11,433,283
Percent of Households Receiving Assistance	18%	12%	10%
2015			
Households	5,168	1,848,325	116,926,305
Households Receiving Public Assistance or Food Stamps	1,472	305,835	16,203,282
Percent of Households Receiving Assistance	28%	17%	14%

Source: U.S. Census Bureau American Community Survey, 5-Year Averages; Garner Economics

Figure 4.16
Households Receiving Public Assistance 2010–2015



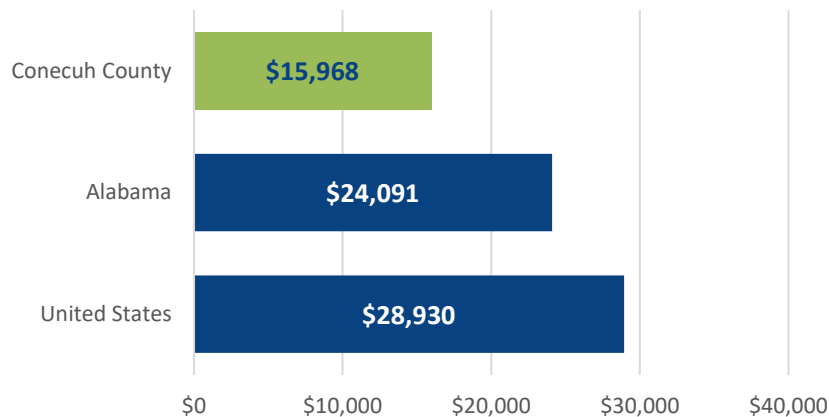
Source: U.S. Census Bureau American Community Survey, 5-Year Averages; Garner Economics

Per Capita Income

Per capita income is the mean annual income computed for every man, woman, and child. It is derived by dividing the aggregate income by the total population. Per capita income is a measure for all residents regardless of where they work, their age, or whether they derive any income.

For 2015, the per capita income in Conecuh County was \$15,968, significantly lower than the state figure of \$24,091 and the national figure of \$28,930. (Figure 4.17).

Figure 4.17
Per Capita Income



Source: U.S. Census Bureau American Community Survey 2011–2015, 5-Year Average;
Garner Economics

Poverty

The measurement of poverty in a community helps to evaluate the well-being of the citizens and the state of the economy.

Compared to the benchmarks, Conecuh County has the highest percentage of its population below the poverty level at 33.8 percent (Table 4.12). The county also had the highest level of *Children Under 18 below Poverty Level* at 41.5 percent.

Table 4.12
Poverty Estimates

(Highest Relative Figure Shaded and Lowest Relative Figure in Green)

	Conecuh County	Alabama	United States
Percent below Poverty Level	33.8%	18.8%	15.5%
Children Under 18 below Poverty Level	41.5%	27.3%	21.7%

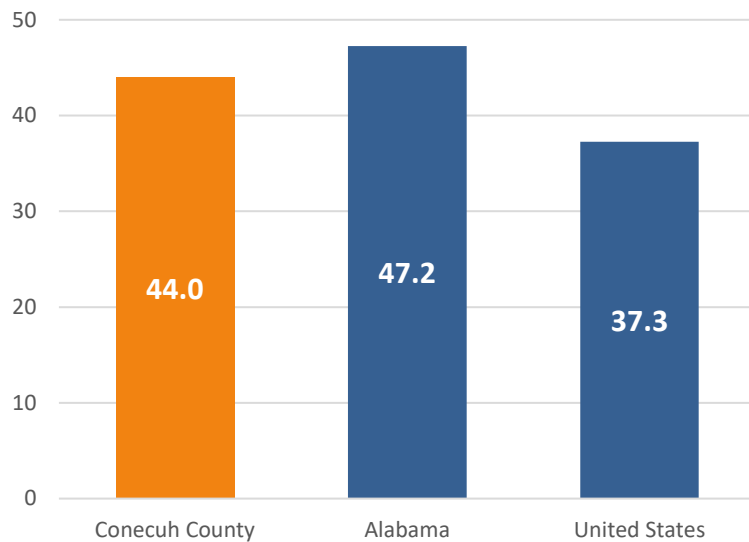
Source: U.S. Census Bureau American Community Survey 2011–2015, 5-Year Average;
Garner Economics

Crime Rates

Crime rates may seem outside the typical measures of economic competitiveness, but these represent a widely accepted, objective gauge used by firms. Crime rates generally reflect underlying economic conditions and may signal deeper systemic problems more so than standard economic measures show.

For 2015, Conecuh County had a violent crime rate of 44 per 10,000 residents, below the state rate but higher than the national level (Figure 4.18). Violent crime is measured by reported incidents of murder, rape, aggravated assault, and robbery. Much of reported crime in this category were assault incidents.

Figure 4.18
2015 Violent Crime Rates per 10,000 Residents

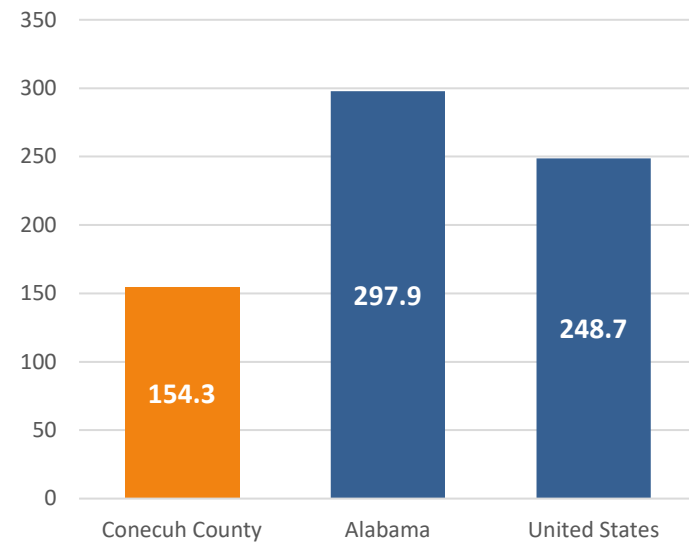


Source: FBI Uniform Crime Reports, Alabama Law Enforcement Agency: Crime in Alabama 2015, Garner Economics

Regarding property crime, the county experienced 154.3 crimes per 10,000 residents, a rate well below Alabama and the United States (Figure 4.19).

The Conecuh County rate was compiled from the number of incidents reported by each law enforcement agency in the county. Pulling from FBI Uniform Crime Reports and the Alabama Law Enforcement Agency, agencies reporting for 2015 included the Conecuh County Sheriff's Department and police departments from Evergreen and Repton.

Figure 4.19
2015 Property Crime Rates per 10,000 Residents



Source: FBI Uniform Crime Reports, Alabama Law Enforcement Agency: Crime in Alabama 2015, Garner Economics

Cost of Living

Generally speaking, Conecuh County has an affordable cost of living compared to the nation and the state. The Cost-of-Living Index uses the national average of 100 for measuring the cost for a set basket of goods and services.

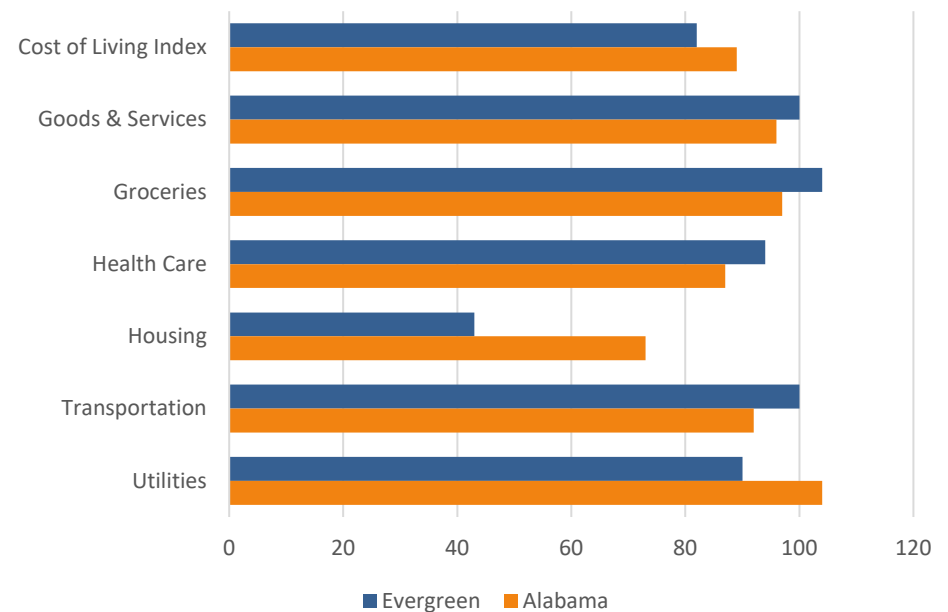
Table 4.13
Cost-of-Living Index, 4th Quarter 2016
(Lowest Relative Figure in **Green**)

	Evergreen/ Conecuh County	Alabama
Composite Cost-of-Living Index	82	89
Goods & Services	100	96
Groceries	104	97
Health Care	94	87
Housing	43	73
Transportation	100	92
Utilities	90	104

Source: AreaVibes.com 2016 (utilizing C2ER Cost-of-Living Index), Garner Economics

The composite Cost-of-Living Index for the city of Evergreen is 82 compared with 89 for Alabama and a national average of 100. Evergreen had an exceptionally low *Housing* index cost of 43 and relatively low cost in the *Health Care* and *Utilities* categories (Table 4.13, Figure 4.20).

Figure 4.20
Cost-of-Living Index, 4th Quarter 2016



Source: AreaVibes.com 2016 (utilizing C2ER Cost-of-Living Index), Garner Economics

Chapter 5: Economic Dynamics & Employment Trends



Labor Force Analysis—Residents & Workers

This chapter focuses on the labor market of Conecuh County, Alabama, beginning with the residents within the county, then exploring commuting patterns with the surrounding area and the full labor force draw of a 45-minute drive time from Evergreen, Alabama.

The data then transitions to employer-based information presenting employment, industry composition, wage comparisons, and additional workplace statistics for those working in Conecuh County.

Labor Force Participation

As of 2015, among residents ages 16 and over in Conecuh County, 46.7 percent are in the labor force, a figure well below the state and national participation rate of 60.5 percent and 63.7 percent respectively (Table 5.1). Although Conecuh County is following a national trend of declining labor force participation, the County participation rate has dropped 2.7 percent since 2010, and Alabama's participation rate declined 2.2 percent.

Of all the total families^c in the labor force, only 19.8 percent of families in Conecuh County have two income earners (*Married, Husband and Wife in Labor Force*)—lower than the state and nation (Table 5.2, Figure 5.1). Conecuh County has 21.2 percent of married couple families with neither in the labor force. The county has the highest percentage of married couples in the labor force with one income (*Married, Husband in Labor Force, Wife Not and Married, Wife in Labor Force, Husband*

^c A family consists of a householder (the person or one of the people in whose name the home is owned or rented) and one or more other people living in the same household who are related to the householder by birth, marriage, or adoption.

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Not) at 17.2 percent and 10.8 percent respectively. The total percentage of families in the labor force is 63.1 percent in Conecuh County, well under the percent of participation at the state and national levels.

Table 5.1
Labor Force Participation
5-Year Change 2010–2015
(Highest Relative Figure Shaded)

	Conecuh County	Alabama	United States
2010	49.4%	60.5%	65.0%
2015	46.7%	58.3%	63.7%
5-Year Change	-2.7%	-2.2%	-1.3%

Source: U.S. Census Bureau American Community Survey 2011–2015, 5-Year Average compared to the 2006–2010, 5-Year Average; Garner Economics

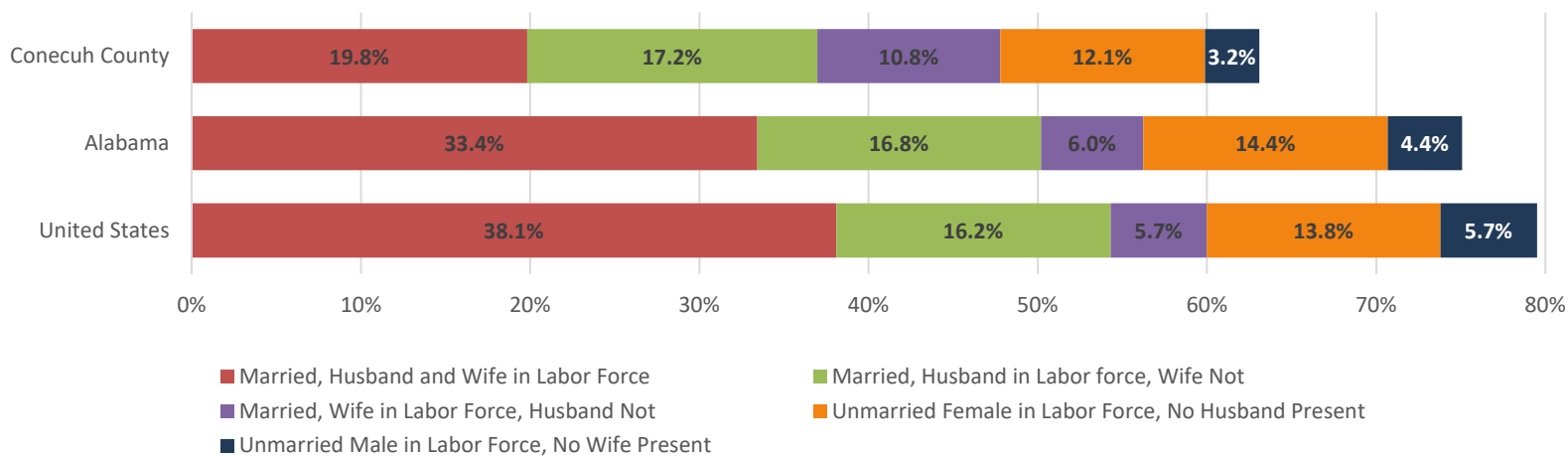


Table 5.2
2015 Labor Force Participation
Percentage of All Families
(Highest Relative Figure Shaded)

	Conecuh County	Alabama	United States
Married-Couple Families			
Married, Husband and Wife in Labor Force	19.8%	33.4%	38.1%
Married, Husband in Labor force, Wife Not	17.2%	16.8%	16.2%
Married, Wife in Labor Force, Husband Not	10.8%	6.0%	5.7%
Other Families			
Unmarried Female in Labor Force, No Husband Present	12.1%	14.4%	13.8%
Unmarried Male in Labor Force, No Wife Present	3.2%	4.4%	5.7%
Total Families in the Labor Force	63.1%	75.1%	79.5%

Source: U.S. Census Bureau American Community Survey 2011–2015, 5-Year Average; Garner Economics

Figure 5.1
2015 Labor Force Participation
Percentage of All Families



Source: U.S. Census Bureau American Community Survey 2011–2015, 5-Year Average; Garner Economics

Labor Draw

The 2016 average annual labor force for Conecuh County was estimated to be 4,593 (Table 5.3). The county experienced a 10.3 percent decline in its labor force between 2006 and 2016, while Alabama had nearly no change in labor force size and the United States grew 5.1 percent. Figure 5.2 displays the variable level of Conecuh County's labor force and its decline.

The effective labor draw considers the documented labor pool for a location based on the existing residential workforce and local road network. The analysis considers the pool of active workers residing within representative drive time from a site.

According to a 45-minute drive time analysis radiating from the City of Evergreen, the estimated 2017 population is more than 86,000 (Figure 5.3, Table 5.4). This area has 81 percent of its population with at least a high school education and 23 percent have earned a degree past high school.

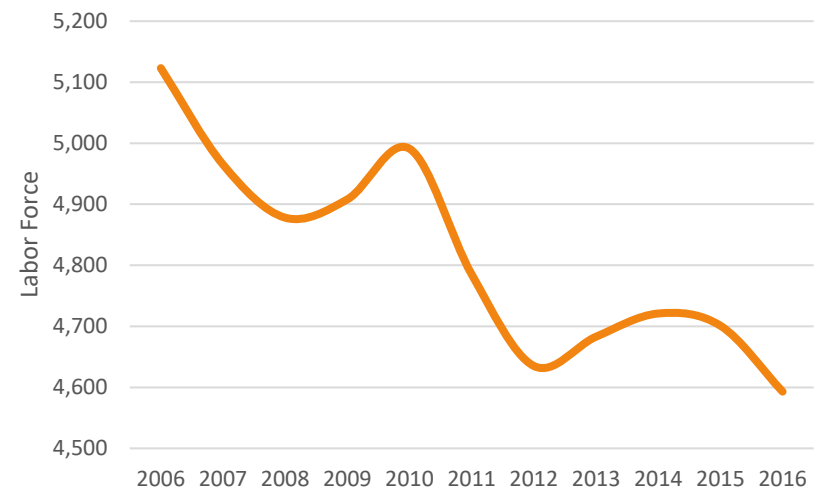
The drive time analysis greatly increases the county's 4,593 labor force figure to one of nearly 34,000. Of this workforce, 5,469 are employed in the *Manufacturing* sector in the 45-minute drive time region. It is estimated that nearly 4,000 individuals are unemployed in this area.

Table 5.3
2006–2016 Annual Average Labor Force
(Highest Relative Figure Shaded)

	Conecuh County	Alabama	United States
2006	5,123	2,167,809	151,428,000
2011	4,785	2,202,670	153,617,000
2016	4,593	2,168,608	159,187,000
Change 2006–2016	-10.3%	0.04%	5.1%
Change 2011–2016	-4.0%	-1.5%	3.6%

Source: U.S. Bureau of Labor Statistics, LAUS & CPS series, Garner Economics

Figure 5.2
2006–2016 Annual Average Labor Force



Source: U.S. Bureau of Labor Statistics, LAUS series, Garner Economics



Figure 5.3
Conecuh County Labor Draw
45-Minute Drive Time Area

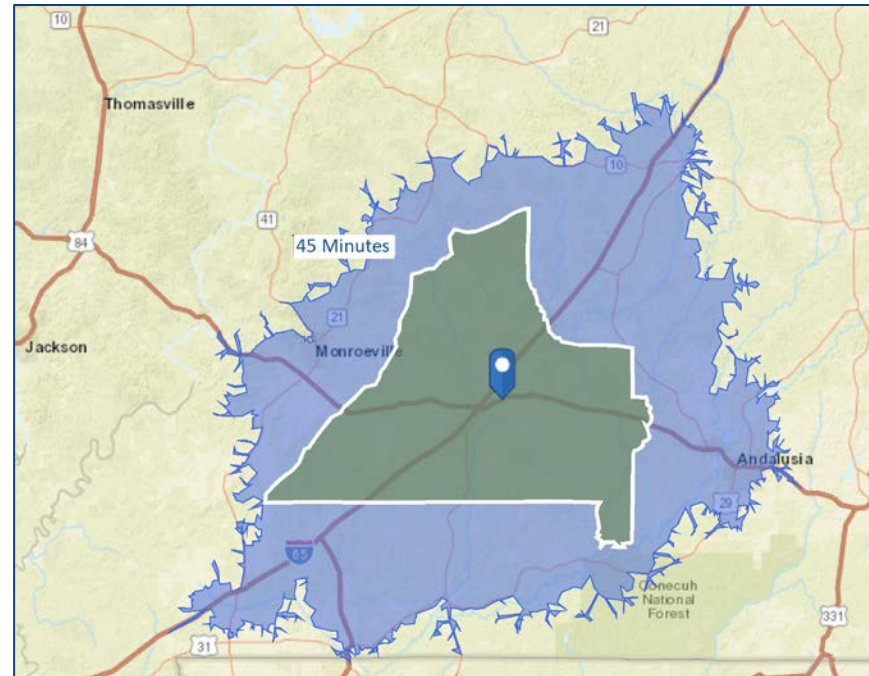


Table 5.4
Conecuh County Labor Draw Demographics
45-Minute Drive Time Area

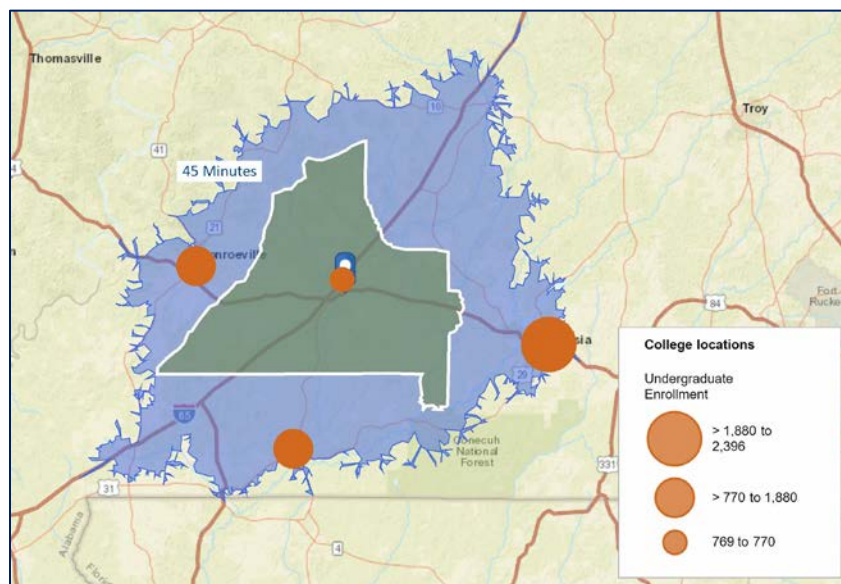
	2016	2017
Total Population	88,251	86,296
Estimated Labor Force	34,270	33,689
Manufacturing Workforce	5,377	5,469
Estimated Unemployed	4,637	3,977
Percent with High School or Higher Education	81%	81%
Percent with Post-Secondary Degree	22%	23%

Source: ESRI, Garner Economics

Enrollment & Degrees Granted

As important as the existing workforce, those that will join the ranks of the labor force with degrees or certifications enhance the opportunity for companies to relocate or expand in the area. Within the 45-minute drive time are four community or technical colleges with more than 6,600 students enrolled in undergraduate programs (Table 5.5, Figure 5.4). These institutions granted more than 1,100 associate degrees and certifications (Table 5.6). Top fields of study for these degrees or certifications were *Liberal Arts* (304 completions), *Health Professions* (283 completions), *Precision Production* (164 completions) and *Engineering-related* (93 completions).

Figure 5.4
Colleges within 45-Minute Drive Time Area



College locations shown with size of bubble relative to undergraduate enrollment.
Source: National Center for Educational Statistics, ESRI, Garner Economics

Table 5.5
Colleges and 2015–16 Undergraduate Enrollment
45-Minute Drive Time Area

Institution	City	2015–2016 Undergraduate Enrollment
Alabama Southern Community College	Monroeville	1,880
Jefferson Davis Community College	Brewton	1,628
Reid State Technical College	Evergreen	769
Lurleen B Wallace Community College	Andalusia	2,396
TOTAL ENROLLMENT		6,673

Table 5.6
Degrees & Certificates Awarded in 2015–2016 by Field of Study

Field of Study	Degrees/Certificates
Liberal Arts and Sciences General Studies and Humanities	304
Health Professions and Related Programs	283
Precision Production	164
Engineering Technologies and Engineering-Related Fields	93
Personal and Culinary Services	90
Mechanic and Repair Technologies/Technicians	86
Business Management Marketing and Related Support Services	60
Family and Consumer Sciences/Human Sciences	24
Transportation and Materials Moving	23
Computer and Information Sciences and Support Services	9
Science Technologies/Technicians	1
TOTAL COMPLETIONS	1,137

Source: National Center for Educational Statistics, Garner Economics (Tables 5.5 & 5.6)

Commuting Patterns

Worker flows help define the size of a local economy's labor draw, and trends help describe attraction and regional competition. Worker flows represent both daily commuters and short-term, away-from-home assignments (major construction projects, on-site consulting, etc.).

In 2014, Conecuh County had a high percentage of workers leaving the county for employment. Since 2004, the county has experienced a 10.9 percent increase of *Out-Commuters*, and an 18.3 percent decrease of those living and working within the county (Table 5.7). *In-Commuter* traffic has remained virtually unchanged during this period. Another indicator in commuting is the distance residents travel for work. In 2014, 38 percent of Conecuh County employed residents who traveled greater than 50 miles for work (Figure 5.5).

In 2014, of the 3,104 employed in Conecuh County, 1,801 workers or 58 percent commuted into the county from other locations (Figure 5.6). The county retained 1,303 employed residents at jobs in Conecuh County. Of the 4,630 employed residents in the county, 72 percent, or 3,327 people left Conecuh County for work (*Out-Commuters*). The net loss for Conecuh County, in terms of commuting workers, is 1,526.

In-Commuters to Conecuh County came from a variety of locations. Escambia County, where the City of Pensacola is located, is at the top of the list with 435 commuters in 2014 (Figure 5.7). Of those commuting out of Conecuh County, neighboring Monroe County is the leading destination of out-commuters, with 626 workers commuting (Figure 5.8). Escambia County attracts just over 600 Conecuh County workers.

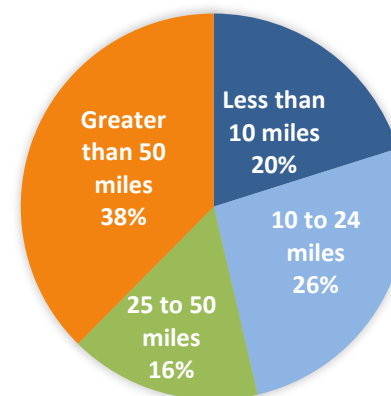
Table 5.7
2004–2014 Conecuh County Commuting Changes

	2004	2014	2004–2014 Change	
			#	%
Living and Employed in Conecuh County	1,595	1,303	-292	-18.3%
Living in Conecuh but Employed Outside (Out-Commuters)	3,001	3,327	326	10.9%
Employed in Conecuh but Living Outside (In-Commuters)	1,789	1,801	12	0.7%

**The U.S. Census Bureau counts one primary job per worker.*

Source: U.S. Census Bureau, Longitudinal Employer-Household Dynamics (LEHD), Garner Economics

Figure 5.5
2014 Commuting Distance of Conecuh County Workers



Source: U.S. Census Bureau, Longitudinal Employer-Household Dynamics (LEHD), Garner Economics

Figure 5.6
2014 Conecuh County Commuting Patterns

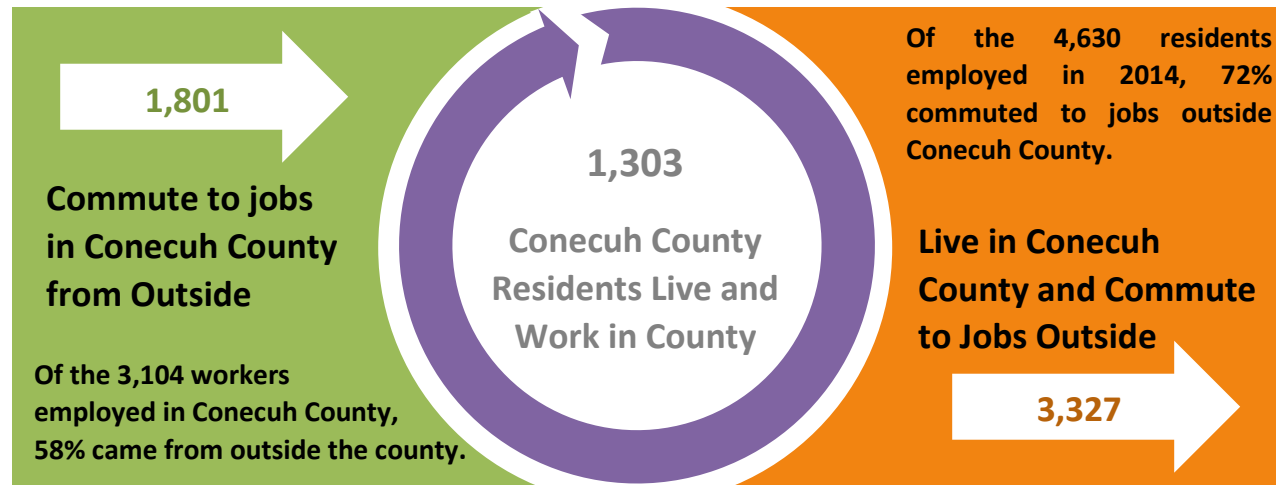


Figure 5.7
2014 Conecuh County In-Commuting

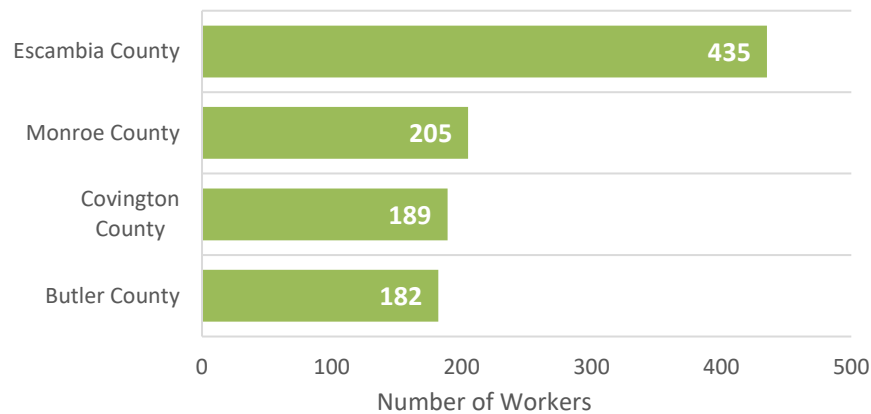
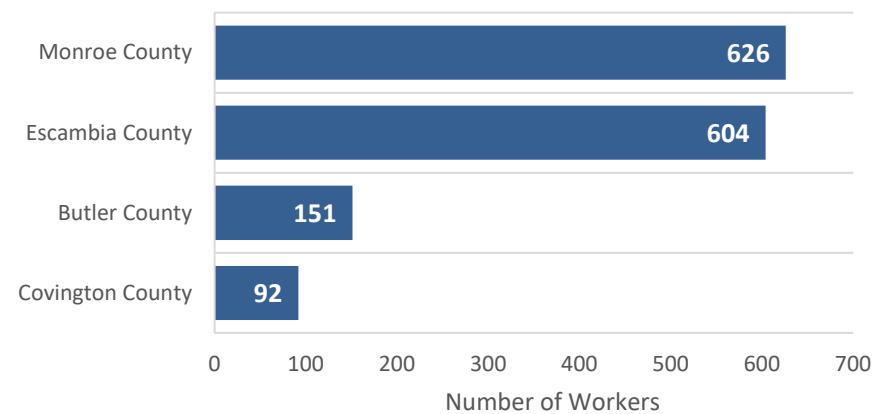


Figure 5.8
2014 Conecuh County Out-Commuting



**The U.S. Census Bureau counts one primary job per worker.
Source: U.S. Census Bureau, Longitudinal Employer-Household Dynamics (LEHD), Garner Economics*

Major Industry Sector Composition

A comparison of major industry employment composition provides a broad relative assessment of differences among economies and may help indicate areas of uniqueness. Conecuh County has the highest relative proportion of total employment in six major industry sectors: *Government, Transportation & Warehousing, Manufacturing, Accommodation & Food Services, Crop & Animal Production, and Wholesale Trade* (Table 5.8).

Several sectors are well above the benchmarks regarding the percent of total employment: *Transportation & Warehousing, Manufacturing, and Crop & Animal Production*.

A detailed analysis of Conecuh County's industrial and occupational specialization relative to the nation can be found in *Chapter 7: Local Specialization, Competitiveness & Growth* and in the *Appendices*.

Table 5.8
2016 Industry Sector Composition
(Highest Relative Figure Shaded)

NAICS	Industry Sector	Conecuh County	Alabama	United States
90	Government	20.6%	19.0%	15.4%
48	Transportation & Warehousing	15.3%	3.0%	3.4%
31	Manufacturing	15.0%	12.3%	7.9%
62	Health Care & Social Assistance	9.7%	10.0%	12.5%
72	Accommodation & Food Services	8.9%	8.4%	8.5%
44	Retail Trade	7.7%	11.3%	10.4%
11	Crop & Animal Production	4.8%	1.0%	1.2%
42	Wholesale Trade	4.1%	3.5%	3.8%
81	Other Services (except Public Administration)	3.3%	5.2%	4.8%
23	Construction	3.3%	5.2%	5.4%
56	Administrative & Support, Waste Management & Remediation Services	2.9%	6.2%	6.3%
52	Finance & Insurance	1.2%	3.5%	3.9%
61	Educational Services	1.0%	1.4%	2.6%
54	Professional, Scientific & Technical Services	0.7%	5.0%	6.4%
51	Information	0.5%	1.0%	1.9%
22	Utilities	0.5%	0.7%	0.4%
21	Mining, Quarrying, Oil & Gas Extraction	0.3%	0.3%	0.4%
55	Management of Companies & Enterprises	0%	0.8%	1.4%
53	Real Estate & Rental & Leasing	ND*	1.2%	1.6%
71	Arts, Entertainment & Recreation	ND*	1.0%	1.7%

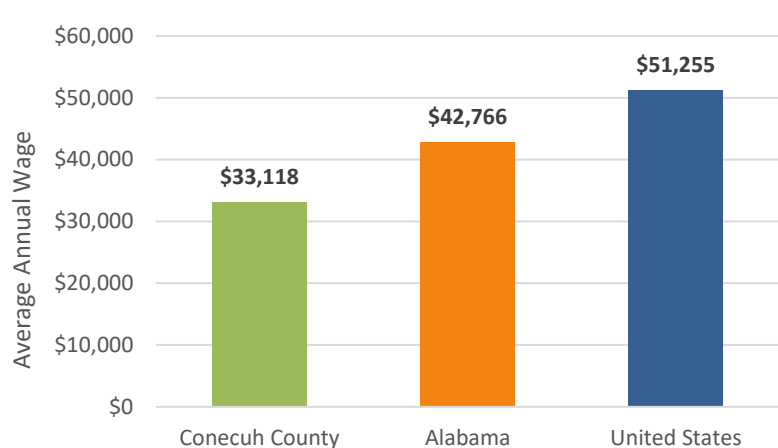
*ND—Not Disclosed

Source: EMSI 2016, Garner Economics

Estimated Average Annual Wage

In 2016, the estimated average wage per job in Conecuh County equaled \$33,118 annually (Figure 5.9), or \$637 weekly.^d It should be noted that the wage applies only to **employment in Conecuh County** and does not measure wages for those workers who live in Conecuh County but commute outside the area (See *Commuting* earlier in Chapter 5). The annual average earnings for all Conecuh County residents, whether they stay in the county for work or out-commute, is a value of \$39,330 for 2015. (See *Individual Earnings* in Chapter 4).

Figure 5.9
2016 Average Annual Wage



Source: EMSI, Garner Economics

Over the last decade, the estimated average annual wage in Conecuh County increased by \$4,515 or 15.8 percent, the lowest growth rate for all geographies (Table 5.9). Even with this substantial increase, the county's annual average wages are still significantly below the state and nation.

Table 5.9
2006–2016 Change in Estimated Average Annual Wage
(Highest Relative Number *Shaded*)

	Conecuh County	Alabama	United States
2016 Average Wage	\$33,118	\$42,766	\$51,255
2006–2016 Wage Change	\$4,515	\$7,945	\$10,455
2006–2016 Percent Wage Change	15.8%	22.8%	25.6%

Source: EMSI, Garner Economics

^d Based on total wage and salary disbursements divided by the number of wage and salary jobs (total wage and salary employment) as reported by the Bureau of Labor Statistics. EMSI includes covered, non-covered wages, and self-employment.



Self-Employed

Measuring the relative proportion of persons who are self-employed is a rough means to gauge entrepreneurial activity, which, in turn, can provide a view of local risk-taking and economic dynamism.

Conecuh County has a total of 10.8 percent of the labor force engaged in self-employment—1.7 percent are *Incorporated* and 9.1 percent are *Not Incorporated and Unpaid Family Workers* (Figure 5.10). The level of

incorporated self-employment is below the percentages at the state and national level; however, those self-employed in unincorporated or unpaid family workers are well above state and national trends.

The top sectors in which self-employed individuals worked included *Professional, Scientific, Management; Construction; Services; Agriculture; and Educational/Health Care* (Figure 5.11).

Figure 5.10
2015 Self-Employed as a Percentage of Workers 16 Years +

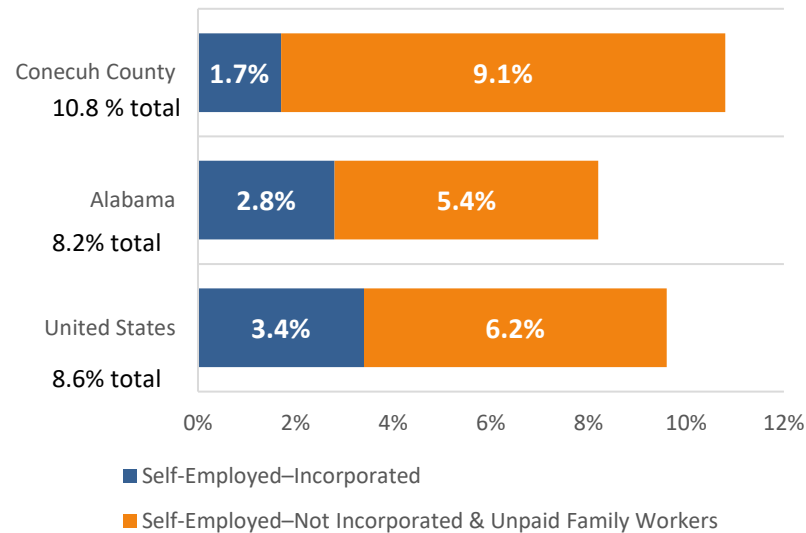
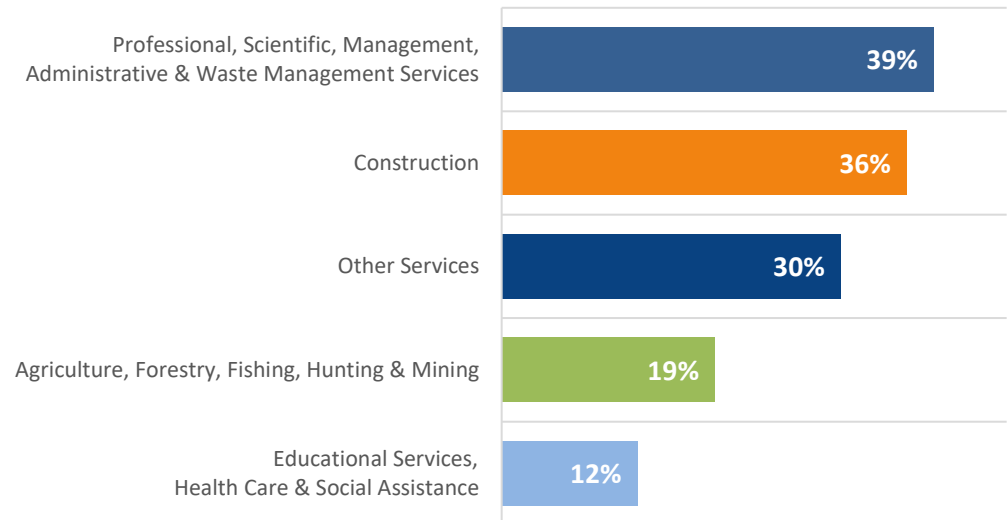


Figure 5.11
2015 Top Self-Employed Sectors



Source: U.S. Census Bureau American Community Survey 2011–2015, 5-Year Average; Garner Economics

Agriculture

Agriculture, characterized as *Crop & Animal Production* industry sector, has a higher percentage (at 4.8) percent of total employment compared to the state and nation (1 percent and 1.2 percent) as seen in Table 5.8 in Major Industry Sector Composition. Self-employment in the *Agriculture, Forestry, Fishing, Hunting & Mining* category is one of the top sectors of work at 19 percent of the *Self-Employed* in Conecuh County (Figure 5.11 in *Self-Employment*).

Conecuh County trends in farm size and acreage are following Alabama's pattern in that the number of farms have decreased; however, the aver-

age size of a farm has increased (Table 5.10). The average size of a farm in Conecuh County in 2012 was 271 acres, a 26 percent increase from 2007. There is 9 percent more land in farms and the value of products sold has increased 107 percent. The average value of products sold per farm also increased 140 percent; however, this average still trails the amount per farm in Alabama.

Top crop and animal products in 2012 were *Poultry & Eggs*, *Cotton*, *Cattle*, and *Other Crops & Hay* (Figure 5.12). Cotton production in volume of sales, ranked 23rd in Alabama and 313th in the United States for 2012 (Table 5.11).

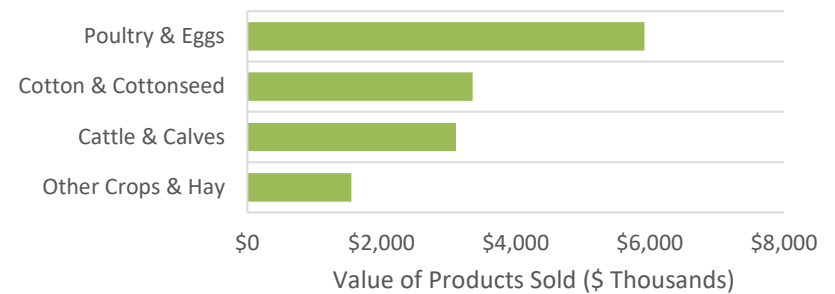
Table 5.10
2007–2012 Change in Farms & Sales
(Highest Relative Number Shaded)

	Number of Farms	Land in Farms	Average Size of Farm	Value of Products Sold (\$ thousands)	Average Sales per Farm
Conecuh County		<i>Acres</i>	<i>Acres</i>		
2007	401	86,293	215	\$7,922	\$19,756
2012	346	93,709	271	\$16,413	\$47,438
Change	-14%	9%	26%	107%	140%
Alabama		<i>Acres</i>	<i>Acres</i>		
2007	48,753	9,033,537	185	\$4,415,550	\$90,570
2012	43,223	8,902,654	206	\$5,571,173	\$128,894
Change	-11%	-1%	11%	26%	42%

Table 5.11
2012 Top Crop & Animal Products in Conecuh County

	Value of Products Sold (\$ thousands)	State Rank	National Rank
Poultry & Eggs	\$5,917	44	715
Cotton & Cottonseed	\$3,359	23	313
Cattle & Calves	\$3,110	49	2094
Other Crops & Hay	\$1,549	34	2094

Figure 5.12
2012 Top Crop & Animal Products in Conecuh County



Source: USDA Census of Agriculture 2012, Garner Economics (Table 5.11 & Figure 5.12)

Broadband

According to the National Telecommunications and Information Administration data as of 2014, households and businesses in Conecuh County have limited access to *DSL or Cable* service as well as limited access to *Two or More Wireline Providers* (Table 5.12).

Data for 2017 still reflects that Conecuh County is well below the state for access to adequate broadband speed (Table 5.13). Access to broadband at speeds of 25 mbps, or megabits per second, is only at 31.7 percent

coverage. The rate is similar for speeds of 100 mbps, echoing that access is very limited.

According to BroadbandNow, the City of Evergreen has ten companies offering internet access: one cable, three DSL, three mobile broadband, and three satellite providers. Availability of these services range from 1.7 percent coverage of Evergreen to 100 percent coverage via mobile service.

Table 5.12
2014 Broadband Availability
(Highest Relative Figure Shaded)

	Conecuh County	Alabama	United States
DSL	50.9%	82.9%	90.0%
Cable	43.7%	80.6%	88.8%
Two or More Wireline Providers	38.7%	76.2%	88.2%

Source: National Telecommunications and Information Administration as of June 30, 2014

Table 5.13
2017 Broadband Access & Speed

	Conecuh County	Alabama
Broadband Access (25 mbps or faster)	31.7%	82.0%
Broadband Access (100 mbps or faster)	31.3%	66.1%
Broadband Access (1 gigabit)	-	3.4%

Source: BroadbandNow, 2017

Chapter 6: Retail Analysis



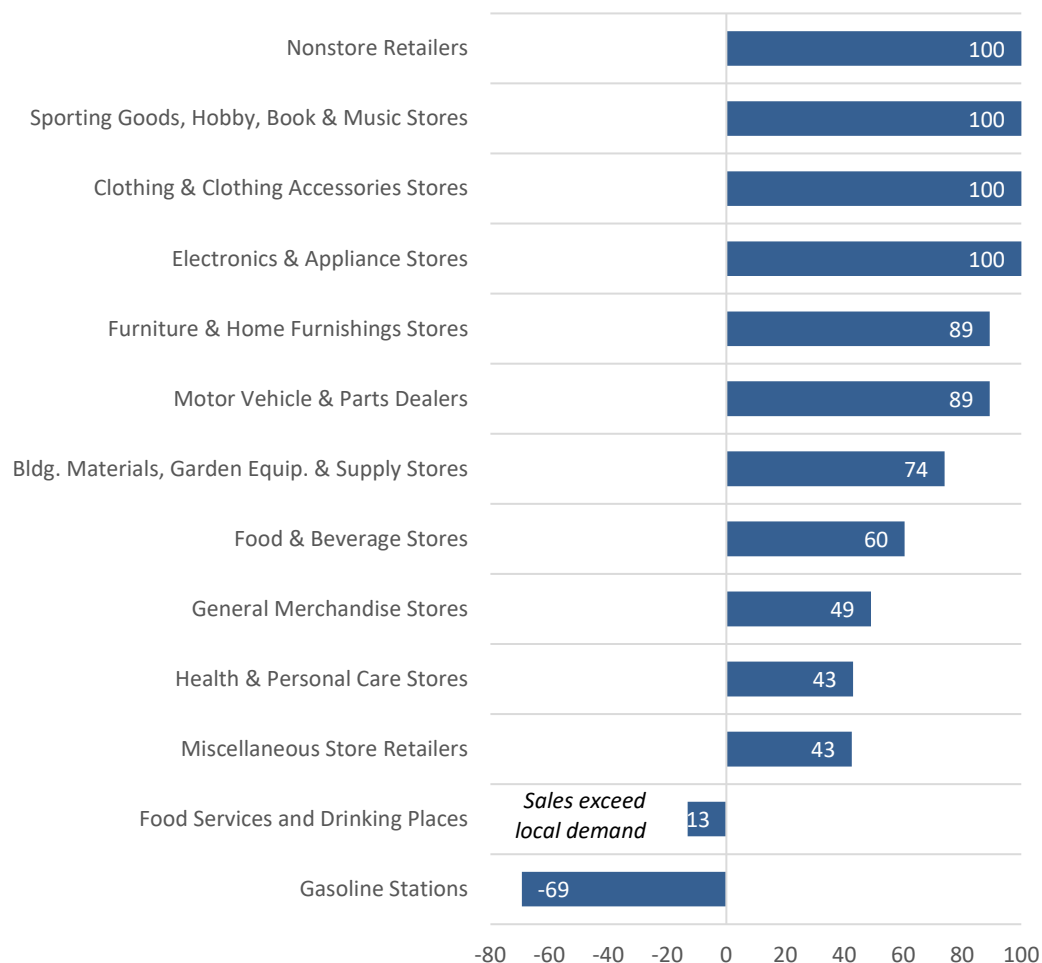
To determine specific industries with retail potential, a retail leakage or gap analysis was conducted. Leakage in an area represents a condition where demand exceeds supply. In other words, retailers outside the market area are fulfilling the demand for retail products; therefore, demand is "leaking" out of the trade area. If the leakage factor is high, the community could potentially support more businesses in that area.

Conecuh County's retail sales were estimated to be \$117 million for retail trades, food and drink sales. Retail demand, or the "Retail Potential" is at \$125.5 million for the county.

A review of 13 major retail categories in Conecuh County reveals some categories have no local sales and a leakage factor of 100, indicating there are no retailers in the market, but household demand exists (Figure 5.1, Table 5.1). These categories are: *Electronics & Appliance Stores*; *Clothing & Accessory Stores*; *Sporting Goods, Hobby, Book & Music Stores*; and *Nonstore Retail*. Digital commerce accounts for most of the *Nonstore Retail* sales as internet-based retail continues to thrive.

Alternately, two categories generated more sales exceeding local demand resulting in a negative leakage factor: *Gasoline Stations* and *Food Services & Drinking Places*. It is likely that these are expenditures from non-local travel through the county. Excluding *Gasoline Stations* and *Food Services and Drinking Places* sales, the county captures only 19 percent of retail potential.

Figure 6.1
2016 Leakage/Surplus Factor for Conecuh County



Note: Food Services and Drinking Places have been included as a convenience and are not technically retail industries.

Source: ESRI Retail MarketPlace Profile, Garner Economics



Table 6.1
2016 Retail Sales and Leakage in Conecuh County, \$Millions

NAICS	Industry	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage Factor
441	Motor Vehicle and Parts Dealers	\$27.78	\$ 1.57	\$26.21	89.3
4411	Automobile Dealers	\$21.92	-	\$21.92	100
4412	Other Motor Vehicle Dealers	\$ 3.48	-	\$ 3.48	100
4413	Automotive Parts, Accessories, and Tire Stores	\$ 2.39	\$1.57	\$ 0.81	20.5
442	Furniture and Home Furnishings Stores	\$ 3.38	\$ 0.19	\$ 3.19	89.3
4421	Furniture Stores	\$ 1.98	\$0.19	\$ 1.79	82.4
4422	Home Furnishings Stores	\$ 1.39	\$0.00	\$ 1.39	100
443	Electronics and Appliance Stores	\$ 2.86	-	\$ 2.86	100
444	Building Material and Supplies Dealers	\$ 7.92	\$ 1.18	\$ 6.74	74
4441	Building Material and Supplies Dealers	\$ 7.36	\$1.18	\$ 6.18	72.3
4442	Lawn and Garden Equipment and Supplies Stores	\$ 0.56	\$0.00	\$ 0.56	100
445	Food and Beverage Stores	\$17.62	\$ 4.35	\$13.27	60.4
4451	Grocery Stores	\$16.34	\$ 3.18	\$13.15	67.4
4452	Specialty Food Stores	\$ 0.64	\$ 0.56	\$ 0.08	6.3
4453	Beer, Wine, and Liquor Stores	\$ 0.65	\$ 0.60	\$ 0.04	3.3
446	Health and Personal Care Stores	\$ 7.39	\$ 2.95	\$ 4.44	43
447	Gasoline Stations	\$15.33	\$84.65	(\$69.33)	(69.3)
448	Clothing and Clothing Accessories Stores	\$ 3.25	-	\$ 3.25	100
4481	Clothing Stores	\$ 2.20	-	\$ 2.20	100
4482	Shoe Stores	\$ 0.51	-	\$ 0.51	100
4483	Jewelry, Luggage, and Leather Goods Stores	\$ 0.54	-	\$ 0.54	100

Table 6.1, continued

NAICS	Industry	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage Factor
451	Sporting Goods, Hobby, Music, and Book Stores	\$ 3.28	-	\$ 3.28	100
4511	Sporting Goods, Hobby, and Music Stores	\$ 2.88	-	\$ 2.88	100
4512	Book Stores and News Dealers	\$ 0.40	-	\$ 0.40	100
452	General Merchandise Stores	\$20.42	\$ 7.00	\$13.42	49
4521	Department Stores	\$13.80	\$ 1.80	\$12.00	76.9
4529	Other General Merchandise Stores	\$ 6.63	\$ 5.20	\$ 1.43	12.1
453	Miscellaneous Store Retailers	\$ 5.26	\$ 2.12	\$ 3.14	42.5
4531	Florists	\$ 0.18	\$ 0.09	\$ 0.09	32.2
4532	Office Supplies, Stationery, and Gift Stores	\$ 0.77	-	\$ 0.77	100
4533	Used Merchandise Stores	\$ 0.68	\$ 0.15	\$ 0.53	64.2
4539	Other Miscellaneous Store Retailers	\$ 3.64	\$ 1.89	\$ 1.75	31.7
454	Nonstore Retailers	\$ 0.94	-	\$ 0.94	100
4541	Electronic Shopping and Mail-Order Houses	\$ 0.25	-	\$ 0.25	100
4542	Vending Machine Operators	\$ 0.14	-	\$ 0.14	100
4543	Direct Selling Establishments	\$ 0.55	-	\$ 0.55	100
722	Food Services and Drinking Places	\$10.06	\$13.08	(\$3.02)	(13.1)
7223	Special Food Services	\$ 0.06	-	\$ 0.06	100
7224	Drinking Places (Alcoholic Beverages)	\$ 0.18	-	\$ 0.18	100
7225	Restaurants and Other Eating Places	\$ 9.81	\$ 13.08	(\$3.26)	(14.3)
TOTAL RETAIL DEMAND AND LEAKAGE		\$125.48	\$117.10	\$ 8.39	3.5

Source: ESRI Retail MarketPlace Profile, Garner Economics

Note: Industries belonging to NAICS 722: Food Services and Drinking Places have been included as a convenience. Technically, these are not retail industries. Retail leakage is the value of retail goods that shoppers from your region buy from other regions. The "Demand" column represents the total amount that your residents spend on a particular industry, while the "Leakage" column represents how much of that spending happens outside of the region.

Chapter 7: Local Specialization, Competitiveness & Growth



The following section provides a more detailed and in-depth assessment of the Conecuh County economy. The analysis examines the local economy from several different perspectives, each adding a supporting layer of information. The assessment's main goals are to provide historic context, reveal areas of unique specialization, gauge competitiveness, and help uncover emerging trends and opportunities. The two main areas of analysis are: **major industries** and **occupational groups**. For each area, there are relative measures of specialization, growth, local competitiveness, and earnings.

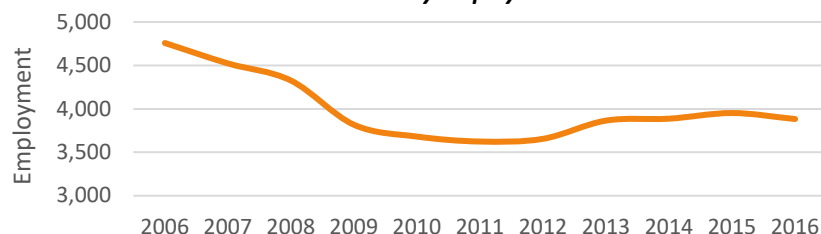
Employment Change

Over the last five years, Conecuh County grew by a net 259 jobs or 7.1 percent (Table 7.1). With a total of 3,883 jobs in the county, this positive five-year change marks a slow recovery from 2011 employment levels (Figure 7.1).

Table 7.1
Conecuh County Employment Change

2006	2011	2016	2011–2016 Change		2006–2016 Change	
			#	%	#	%
4,758	3,624	3,883	259	7.1%	(875)	(18%)

Figure 7.1
Conecuh County Employment



Source: ESMI, Garner Economics (Table 7.1 and Figure 7.1)

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Major Industry Sector Change

The largest absolute industry job gains in Conecuh County came from *Transportation & Warehousing*, up 154 jobs or 35 percent (Table 7.2, Figure 7.2). The highest percent growth occurred in *Wholesale Trade*, growing 289 percent—from an employment of 41 in 2011 to 158 jobs in 2016.

Other gains were made in *Accommodation & Food Services* (73 jobs/26.9 percent); *Manufacturing* (43 jobs/8 percent); *Administrative, Support, Waste Management & Remediation Services* (13 jobs/13 percent); *Educational Services* (6 jobs/17 percent); and *Utilities* (4 jobs/23 percent).

Eight sectors in the county lost jobs including *Government* (-54 jobs/6.4 percent), *Crop & Animal Production* (-47 jobs/20 percent); and *Health Care & Social Assistance* (-22 jobs/5.6 percent). The other 5 sectors lost 12 or fewer jobs during the past 5 years; however, with a job loss of 8, the *Finance & Insurance* sector decreased 14.8 percent.

Other sectors remained the same or had insufficient information to calculate change.



Figure 7.2
2011–2016 Employment Change by Major Industry

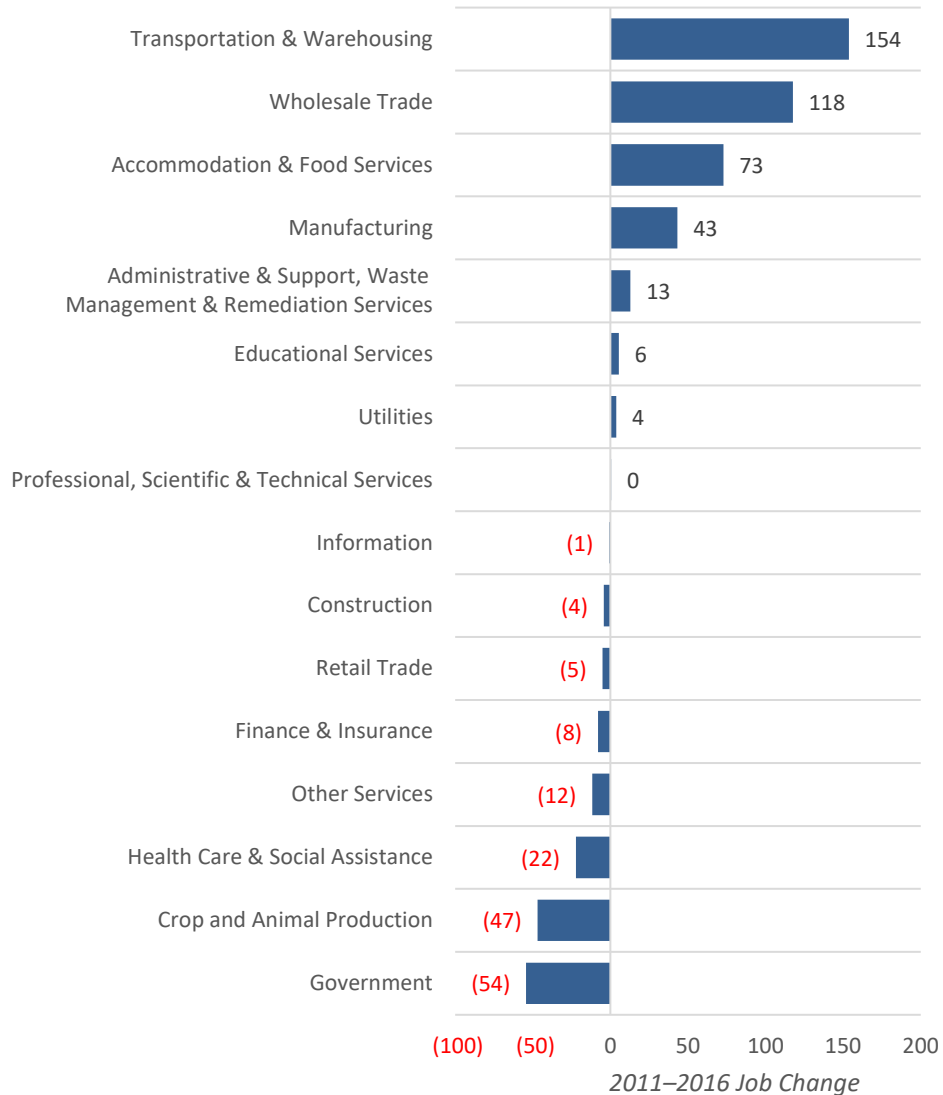


Table 7.2
2011–2016 Employment Change by Major Industry

Industry Sector	2016 Jobs	Employment Change	Percent Change
Transportation & Warehousing	593	154	35.0%
Wholesale Trade	158	118	289.3%
Accommodation & Food Services	344	73	26.9%
Manufacturing	583	43	8.0%
Administrative & Support, Waste Management & Remediation Services	112	13	13.1%
Educational Services	38	6	17.3%
Utilities	20	4	23.2%
Professional, Scientific & Technical Services	27	0	0%
Information	20	(1)	-3.6%
Construction	128	(4)	-3.2%
Retail Trade	301	(5)	-1.7%
Finance & Insurance	46	(8)	-14.8%
Other Services	128	(12)	-8.4%
Health Care & Social Assistance	375	(22)	-5.6%
Crop and Animal Production	186	(47)	-20.2%
Government	798	(54)	-6.4%
Mining, Quarrying, Oil & Gas Extraction	11	*	*
Real Estate, Rental & Leasing	<10	*	*
Arts, Entertainment & Recreation	<10	*	*

*Insufficient data to perform calculation

Note: Management of Companies and Enterprises sectors had no jobs in 2011 or 2016.

Source: ESMI, Garner Economics

Industry Earnings

A comparison of Conecuh County industry earnings to state and national averages may offer insights into areas of unique expertise or cost-saving opportunities. In general, wages were below the Alabama and United States averages except for *Crop & Animal Production*, which was 22 percent higher than the state and 30 percent higher than the nation (Table 7.3, Figure 7.3).

Four industry sectors in Conecuh County have wages 60 percent or more below national average: *Utilities* (64 percent lower); *Professional, Scientific & Technical Services* (60 percent lower); *Finance & Insurance* (61 percent lower); and *Information* (62 percent lower). The *All Industry* average salary for Conecuh County is 35 percent under the national average wage and 23 percent under the state average wage.

Table 7.3
2016 Average Annual Industry Salary Comparison
*(Salaries above the National Average Highlighted in **Green** and above Alabama in **Bold**)*

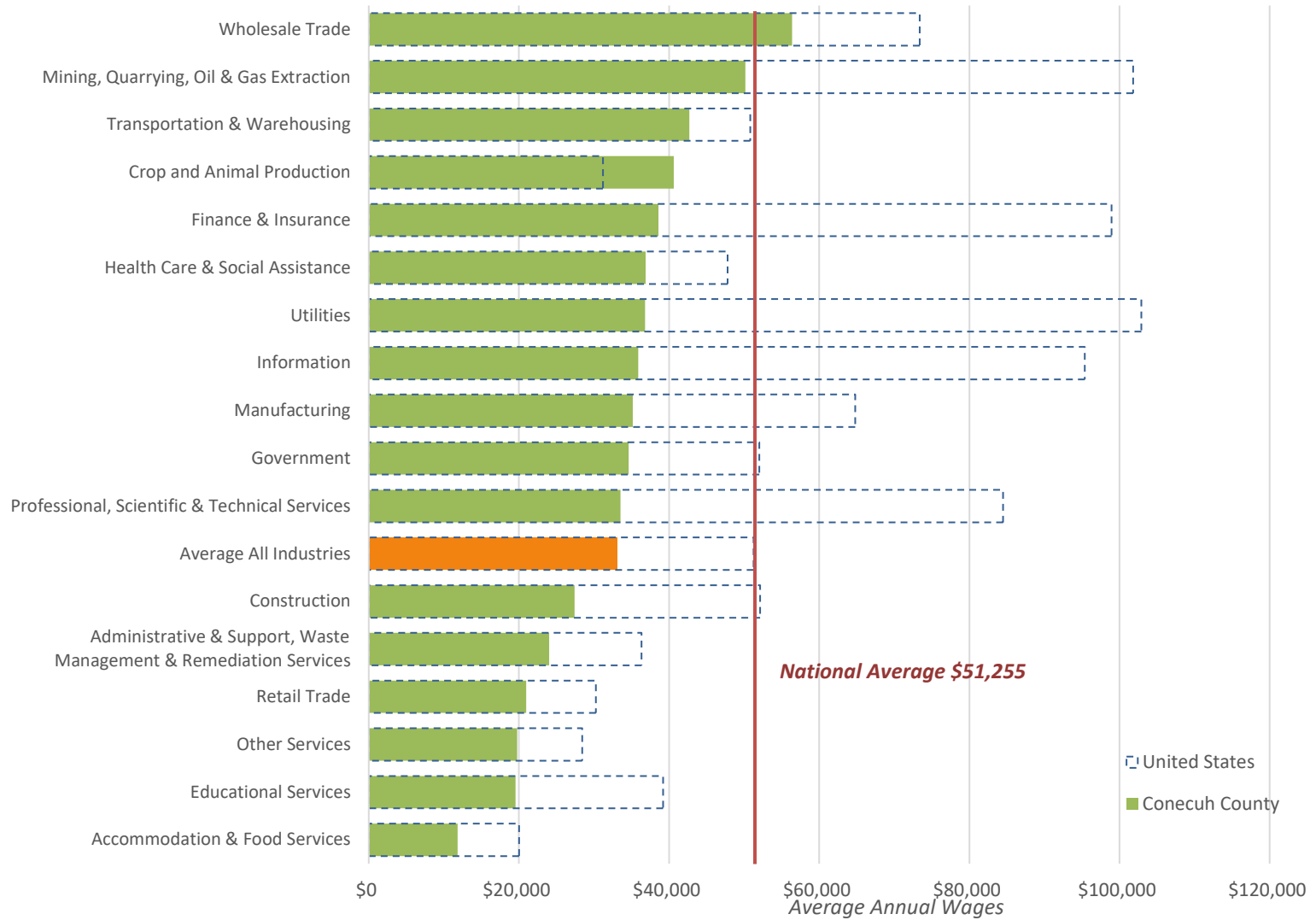
Industry Sector	Conecuh County	Alabama	Compared to Alabama	United States	Compared to United States
Crop and Animal Production	\$40,624	\$33,228	22%	\$31,208	30%
Transportation & Warehousing	\$42,715	\$46,616	-8%	\$50,826	-16%
Wholesale Trade	\$56,375	\$62,406	-10%	\$73,383	-23%
Administrative & Support, Waste Management & Remediation Services	\$24,035	\$26,689	-10%	\$36,329	-34%
Other Services	\$19,781	\$24,287	-19%	\$28,425	-30%
Health Care & Social Assistance	\$36,860	\$45,403	-19%	\$47,797	-23%
Retail Trade	\$20,964	\$26,998	-22%	\$30,245	-31%
Accommodation & Food Services	\$11,835	\$15,723	-25%	\$20,041	-41%
Government	\$34,613	\$46,408	-25%	\$52,021	-33%
Mining, Quarrying, Oil & Gas Extraction	\$50,159	\$74,049	-32%	\$101,829	-51%
Educational Services	\$19,564	\$29,043	-33%	\$39,216	-50%
Information	\$35,890	\$54,824	-35%	\$95,373	-62%
Manufacturing	\$35,155	\$54,432	-35%	\$64,786	-46%
Construction	\$27,426	\$43,871	-37%	\$52,114	-47%
Finance & Insurance	\$38,586	\$69,317	-44%	\$98,949	-61%
Professional, Scientific & Technical Services	\$33,516	\$71,496	-53%	\$84,474	-60%
Utilities	\$36,799	\$100,570	-63%	\$102,926	-64%
Average All Industries	\$33,118	\$42,766	-23%	\$51,255	-35%

Note: Wages were not available for the following industry sectors: Real Estate, Rental & Leasing; Management of Companies & Enterprises; Arts, Entertainment & Recreation.

Source: EMSI, Garner Economics



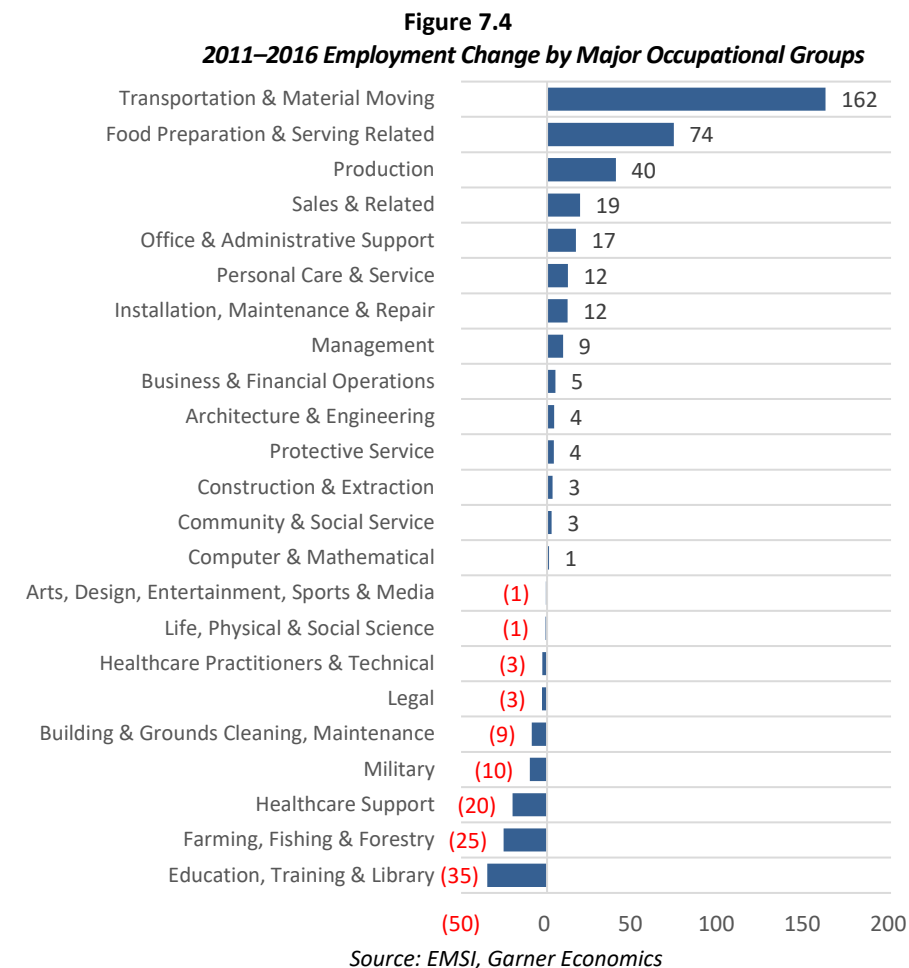
Figure 7.3
2016 Average Annual Industry Salary Comparison



Note: Wages were not available for the following industry sectors: Real Estate, Rental & Leasing; Management of Companies & Enterprises; Arts, Entertainment & Recreation.
 Source: EMSI, Garner Economics

Major Occupational Change

Over the last five years, the top occupations with absolute job gains in Conecuh County were in *Transportation & Material Moving*, up 162 jobs or 28.9 percent and *Food Preparation & Serving Related*, up 74 jobs or 28.2 percent (Table 7.4, Figure 7.4). Gains were also seen in *Production* (40 jobs/10.6 percent) and *Sales* (19 jobs/6.7 percent).



The greatest job losses were in the occupational areas of *Education, Training & Library* (-35 jobs/12.7 percent); *Farming, Fishing & Forestry* (-25 jobs/17.9 percent); and *Healthcare Support* (-20 jobs/24 percent).

Table 7.4
Employment Change by Major Occupational Groups
(Ranked by Absolute Change)

Occupations	2016 Jobs	2011-16 Change	Percent Change
Transportation & Material Moving	722	162	28.9%
Food Preparation & Serving Related	335	74	28.2%
Production	418	40	10.6%
Sales & Related	309	19	6.7%
Office & Administrative Support	451	17	3.9%
Personal Care & Service	97	12	14.4%
Installation, Maintenance & Repair	168	12	7.7%
Management	131	9	7.7%
Business & Financial Operations	62	5	8.7%
Architecture & Engineering	25	4	19.6%
Protective Service	77	4	5.4%
Construction & Extraction	159	3	2.1%
Community & Social Service	51	3	5.7%
Computer & Mathematical	16	1	8.1%
Arts, Design, Entertainment, Sports & Media	19	(1)	-3.6%
Life, Physical & Social Science	14	(1)	-6.7%
Healthcare Practitioners & Technical	208	(3)	-1.3%
Legal	10	(3)	-22.0%
Building & Grounds Cleaning, Maintenance	137	(9)	-6.1%
Military	55	(10)	-15.5%
Healthcare Support	63	(20)	-24.0%
Farming, Fishing & Forestry	116	(25)	-17.9%
Education, Training & Library	239	(35)	-12.7%
All Occupations Total/Average	3,883	259	7.1%

Source: EMSI, Garner Economics

Occupational Earnings

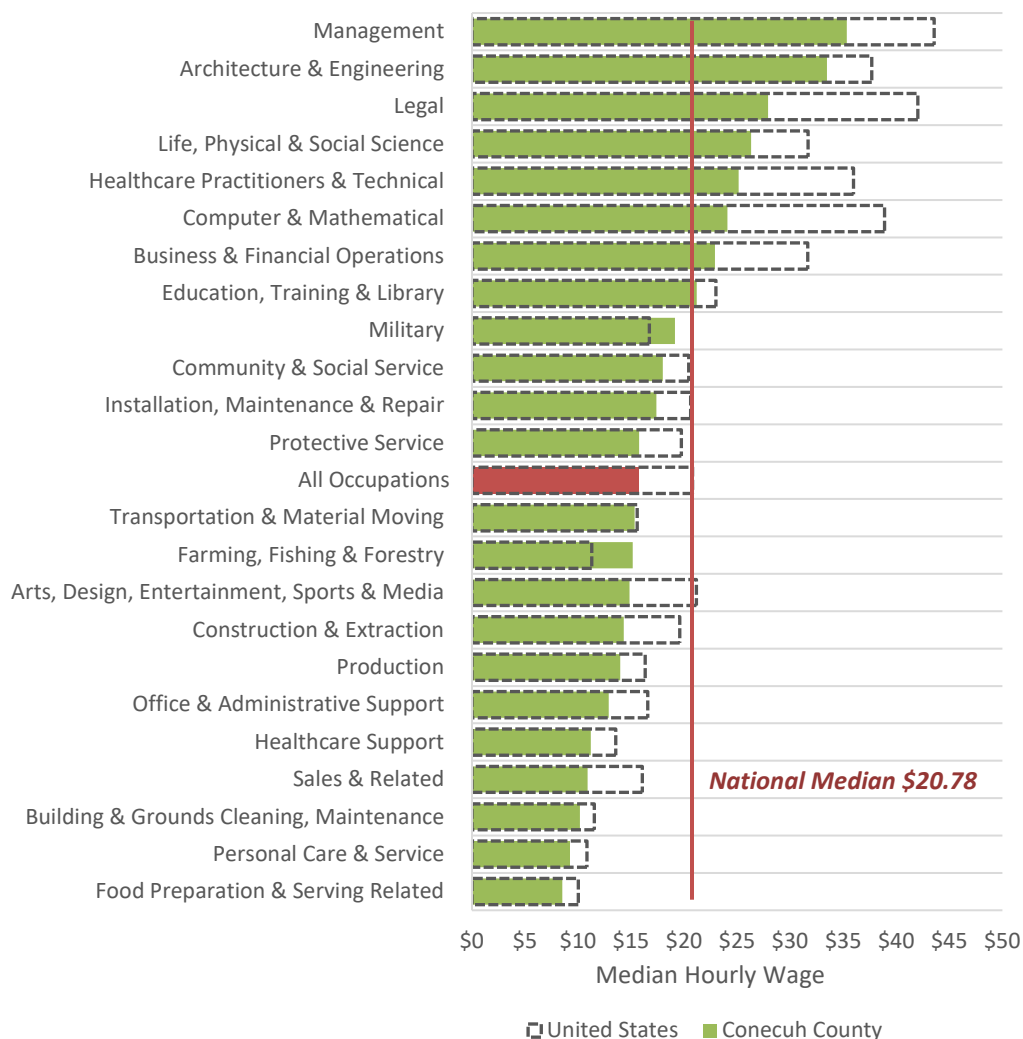
A comparison of the same-occupation median hourly earnings for Conecuh County to the national median wage revealed only two occupations that were higher than the national median: *Farming, Fishing & Forestry* and *Military* (Table 7.5, Figure 7.5).

The *Farming* median hourly wage was 34.4 percent higher than the United States and 17 percent higher than Alabama. *Military* occupations paid a median wage 14.4 percent higher than the national median.

Two other occupations ranked higher than the Alabama median wage rate: *Transportation & Material Moving* (6.9 percent higher) and *Education, Training & Library* (.5 percent higher).

The median wage for all occupations in Conecuh County was \$15.65 compared to \$18.62 for the Alabama median wage and \$20.78 for the national median. Conecuh County's median wage is 15.9 percent lower than Alabama and 24.7 percent lower than the United States.

Figure 7.5
2016 Median Hourly Occupational Earnings Comparison



Source: EMSI, Garner Economics

Table 7.5
2016 Median Hourly Occupational Earnings Comparison
(Wages above the National Median highlighted in **Green** and above Alabama in **Bold**)

Description	Conecuh County	Alabama	Compare to Alabama	United States	Compare to United States
Farming, Fishing & Forestry	\$15.15	\$12.95	17.0%	\$11.28	34.4%
Transportation & Material Moving	\$15.34	\$14.35	6.9%	\$15.57	-1.5%
Education, Training & Library	\$21.18	\$21.07	0.5%	\$23.00	-7.9%
Building & Grounds Cleaning, Maintenance	\$10.16	\$10.28	-1.1%	\$11.54	-12.0%
Protective Service	\$15.75	\$16.24	-3.1%	\$19.73	-20.2%
Community & Social Service	\$17.98	\$18.73	-4.0%	\$20.44	-12.0%
Personal Care & Service	\$9.25	\$9.75	-5.2%	\$10.83	-14.6%
Healthcare Support	\$11.21	\$11.84	-5.3%	\$13.55	-17.3%
Life, Physical & Social Science	\$26.32	\$28.11	-6.4%	\$31.70	-17.0%
Military	\$19.14	\$20.79	-7.9%	\$16.73	14.4%
Food Preparation & Serving Related	\$8.52	\$9.31	-8.4%	\$10.01	-14.8%
Production	\$13.96	\$15.56	-10.3%	\$16.32	-14.4%
Arts, Design, Entertainment, Sports & Media	\$14.84	\$17.03	-12.8%	\$21.14	-29.8%
Office & Administrative Support	\$12.89	\$15.00	-14.0%	\$16.58	-22.2%
Construction & Extraction	\$14.30	\$16.89	-15.3%	\$19.59	-27.0%
Management	\$35.33	\$41.79	-15.5%	\$43.56	-18.9%
Installation, Maintenance & Repair	\$17.37	\$20.60	-15.7%	\$20.62	-15.7%
Architecture & Engineering	\$33.45	\$39.98	-16.3%	\$37.69	-11.2%
Legal	\$27.91	\$34.50	-19.1%	\$42.04	-33.6%
Healthcare Practitioners & Technical	\$25.14	\$31.41	-20.0%	\$35.97	-30.1%
Sales & Related	\$10.89	\$13.77	-20.9%	\$16.06	-32.2%
Business & Financial Operations	\$22.90	\$30.39	-24.6%	\$31.64	-27.6%
Computer & Mathematical	\$24.09	\$35.82	-32.7%	\$38.89	-38.0%
All Occupations	\$15.65	\$18.62	-15.9%	\$20.78	-24.7%

Source: EMSI; Garner Economics



The following assessment tools include a series of bubble/scatter charts and tables. Axis and quadrant labels should be read as only general guides resulting from purely quantitative analysis, not definitive conclusions. Each chart or table is meant as only one piece of a multiple-part analysis. To assist the reader in interpreting the bubble charts, each axis and quadrant is labeled with broad descriptives.

Chart axis definitions:

- **Specialization:** Measured using location quotient (LQ).^e Reflects the level of relative concentration of a particular occupation/industry to the nation. In simple terms, a high LQ (above 1.2) indicates what a local economy is good at doing and implies there are unique skills, institutions, raw materials, etc., that support this position.
- **Industry Effect:** The portion of growth/decline attributed to a particular industry nationwide. For example, if hospital employment grew by 5 percent nationwide in 2011, we would expect to see the same percentage increase locally, assuming that the forces driving nationwide growth would have a similar local impact.
- **Local Effect:** The proportion of growth/decline not captured by the industry effect, indicating unique local performance. The local effect measures local activity outside the expected nationwide trend. A consistent positive local competitive effect signals superior local performance.

Chart quadrant label definitions:

- **At-Risk:** Locally specialized and recent local job losses.
- **Declining:** Not locally specialized and recent local job losses.
- **Competitive:** Locally specialized and recent local job gains.
- **Emerging:** Not locally specialized and recent local job gains.
- **Local Decline/National Growth:** Industry or occupation gains nationwide and local losses or gains below nationwide trend.
- **Local Growth/National Growth:** Industry or occupation gains nationwide and positive local gains or losses less than nationwide trend.
- **Local Growth/National Decline:** Industry or occupation losses nationwide and positive local gains or losses less than nationwide trend.
- **Local Decline/National Decline:** Industry or occupation losses nationwide and local losses or gains below nationwide trend.

Detailed industry and occupational information can be found in Appendices C and D, respectively.

^e To measure local specialization, location quotients (LQs) for each occupation or industry are derived. LQs are ratios of an area's distribution of employment for a specific occupation/industry compared to a reference or base area's distribution. In this analysis, the reference area is the United States. If an LQ is equal to 1, then the industry has the same share of its area employment as it does in the reference area. An LQ greater than 1 indicates an industry with a greater share of the local area employment than is the case in the reference area and implies local specialization. LQs are calculated by first dividing local industry employment by the all-industry total of local employment. Second, reference area industry employment is divided by the all-industry total for the reference area. Finally, the local ratio is divided by the reference area ratio.

Major Industry Sector Specialization & Growth

Major industry sector specialization focuses on the geographic concentrations of similarly classified industries. For many industry sectors, there exists interconnectedness among suppliers, occupations, and associated supporting institutions.

Observations: There are five industry sectors with a level of local specialization above 1.0 that grew in the last five years, comprising sectors in the *Competitive* category:

- *Transportation & Warehousing (LQ of 4.47)*
- *Wholesale Trade (LQ of 1.07)*
- *Accommodation & Food Services (LQ of 1.04)*
- *Manufacturing (LQ of 1.89)*
- *Utilities (LQ of 1.45)*

There are three industry sectors in Conecuh County with a level of local specialization below 1.0; however, due to job growth, these industry sectors are classified as *Emerging* (Table 7.6, Figure 7.6).

Several sectors have a high LQ; however, due to recent job losses, they are categorized *At-Risk*. The two sectors, *Crop and Animal Production* and *Government*, had LQs of 3.88 and 1.34 respectively.

There are six industries *Declining* due to low local specialization and job loss.

The *Management of Companies and Enterprises* sector did not report any jobs in 2016 or 2011 and was not included. Additionally, the *Real Estate*, *Arts*, and *Mining* categories did not have sufficient data for analysis due to disclosure and are not included in this chapter.

Table 7.6
Industry Specialization & Growth

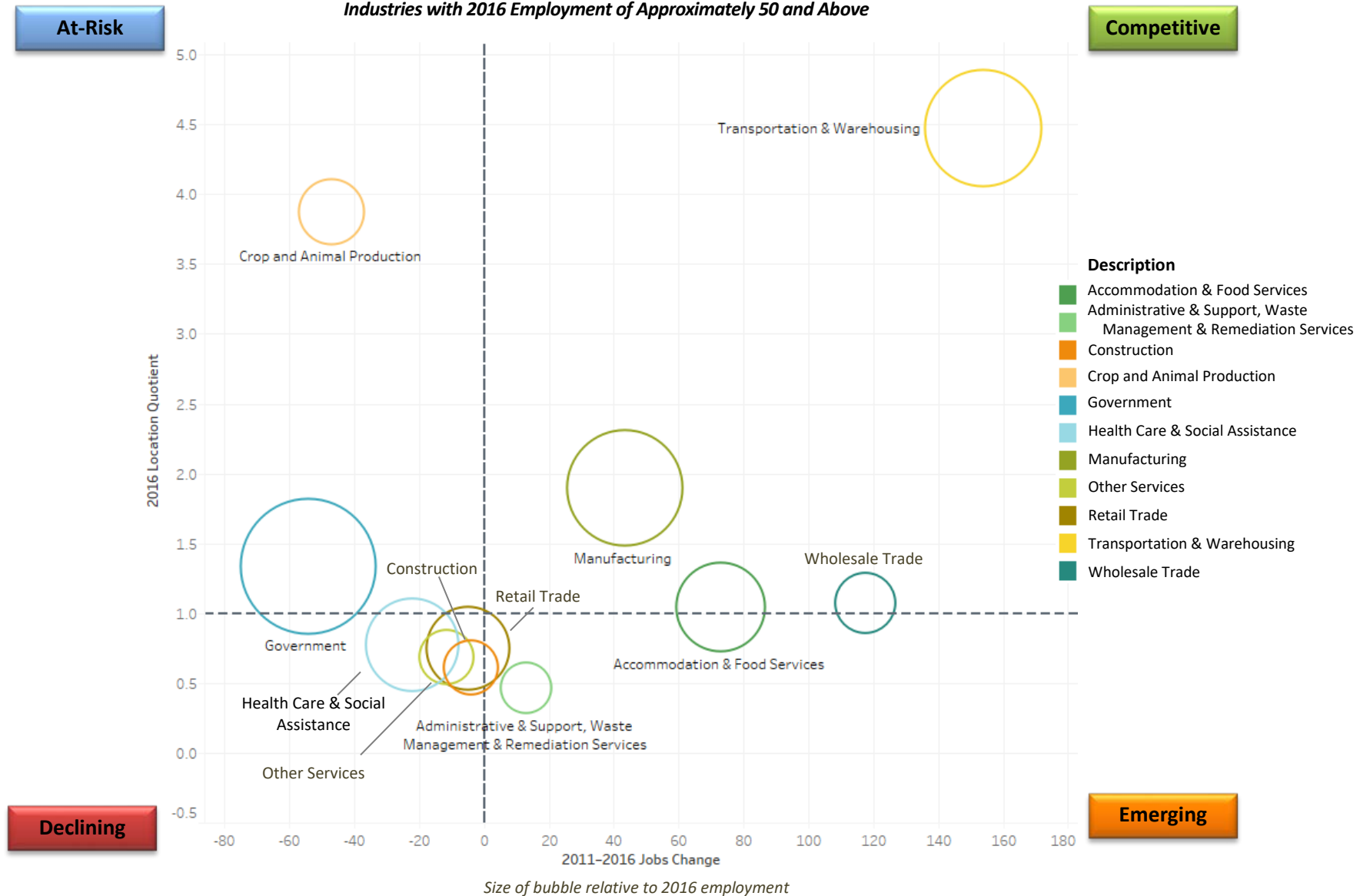
Industry	2011–2016 Employment Change	2016 Location Quotient	2016 Jobs
Competitive			
Transportation & Warehousing	154	4.47	593
Wholesale Trade	118	1.07	158
Accommodation & Food Services	73	1.04	344
Manufacturing	43	1.89	583
Utilities	4	1.45	20
Emerging			
Administrative & Support, Waste Management & Remediation Services	13	0.46	112
Mining, Quarrying, Oil & Gas Extraction	11	0.67	11
Educational Services	6	0.38	38
At-Risk			
Crop and Animal Production	(47)	3.88	186
Government	(54)	1.34	798
Declining			
Health Care & Social Assistance	(22)	0.77	375
Retail Trade	(5)	0.74	301
Other Services	(12)	0.69	128
Construction	(4)	0.61	128
Finance & Insurance	(8)	0.30	46
Information	(1)	0.28	20

Note: Management of Companies and Enterprises sector had no jobs in 2011 or 2016. Real Estate, Rental & Leasing; Arts, Entertainment & Recreation; and Mining, Quarrying, Oil & Gas Extraction categories did not have sufficient data for analysis.

Source: EMSI, Garner Economics



Figure 7.6
Industry Specialization & Growth
Industries with 2016 Employment of Approximately 50 and Above



Source: EMSI, Garner Economics

Major Industry Competitiveness

The Competitiveness screen seeks to reveal local competitive advantages (i.e., unique growth beyond predicted industry trends).

Observations:

- By this measure, *Transportation & Warehousing* and *Accommodation & Food Services* are the sectors with both local and national growth (Table 7.6, Figure 7.6).
- Other industries with local growth are *Wholesale Trade*, *Manufacturing*, *Mining*, *Utilities*, and *Educational Services*.
- Five industry sectors had positive industry effect with national growth, but experienced local job loss. These are *Administrative & Support*, *Waste Management & Remediation Services*; *Arts, Entertainment & Recreation*; *Professional, Scientific & Technical Services*; *Construction*; and *Health Care & Social Assistance*.
- By this analysis, the county's least competitive sectors are *Crop & Animal Production*; *Government*; and *Retail Trade*.
- Overall, Conecuh County demonstrated a positive local competitive effect in 7 of the 18 major industry groups.

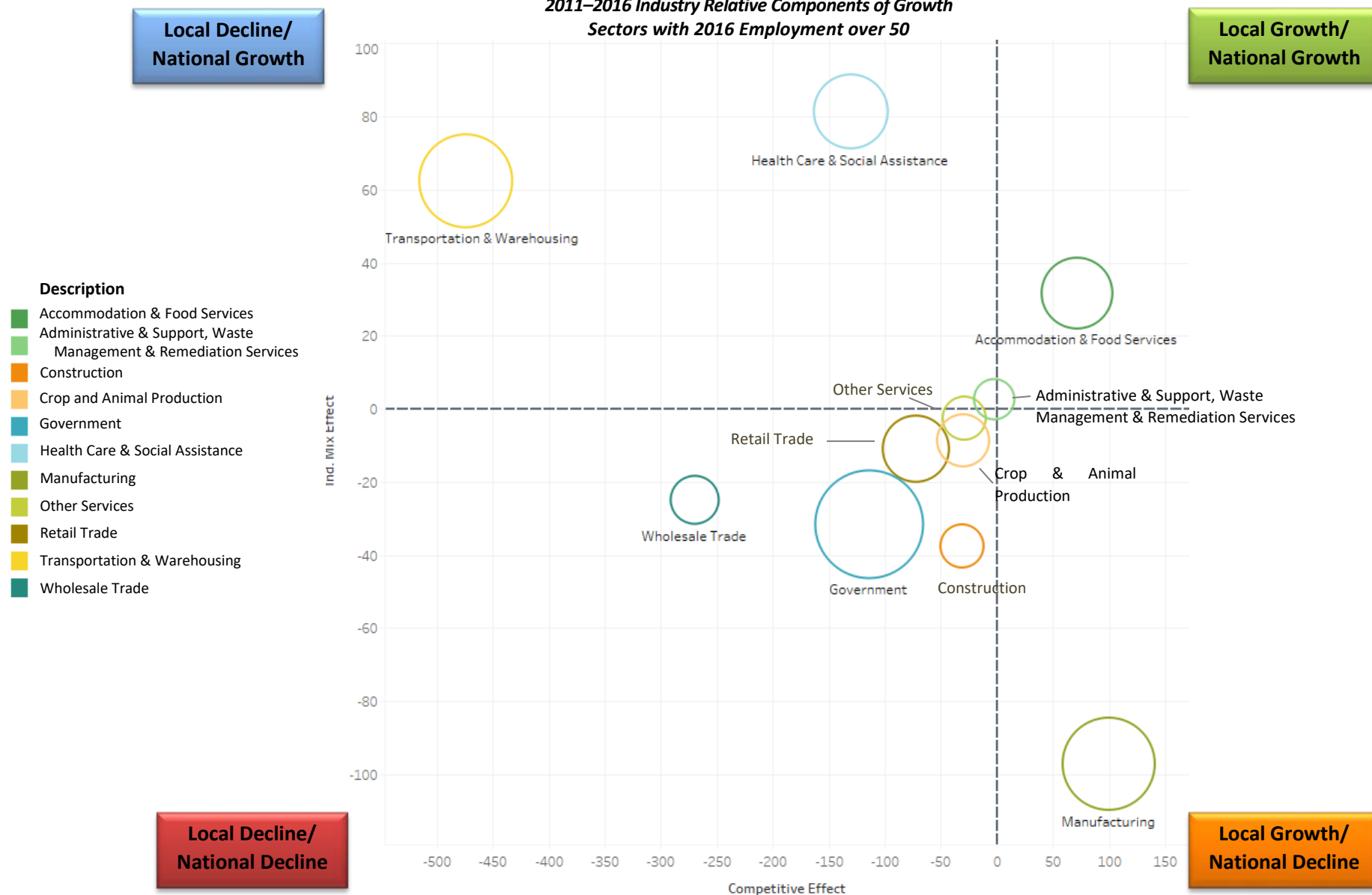
Table 7.7
Industry Relative Components of Growth, 2011–2016

Industry Sector	Local Competitive Effect	Industry Effect	2016 Jobs
Local Growth/National Growth			
Transportation & Warehousing	85	32	593
Accommodation & Food Services	29	21	344
Local Growth/National Decline			
Wholesale Trade	115	(1)	158
Manufacturing	16	(18)	583
Mining, Quarrying, Oil & Gas Extraction	4	(2)	11
Utilities	3	(1)	20
Educational Services	3	0	38
Local Decline/National Growth			
Administrative & Support, Waste Management & Remediation Services	(1)	6	112
Arts, Entertainment & Recreation	(2)	1	0
Professional, Scientific & Technical Services	(3)	1	27
Construction	(23)	7	128
Health Care & Social Assistance	(74)	19	375
Local Decline/National Decline			
Information	(2)	(1)	20
Finance & Insurance	(10)	(2)	46
Other Services	(14)	(10)	128
Retail Trade	(27)	(4)	301
Government	(54)	(71)	798
Crop and Animal Production	(59)	(7)	186

Source: EMSI, Garner Economics



Figure 7.7
2011–2016 Industry Relative Components of Growth
Sectors with 2016 Employment over 50



Size of bubble relative to 2016 employment
Source: EMSI, Garner Economics

Occupational Specialization & Growth

Occupational groupings represent similar skills and educational qualifications, but not necessarily specific industry sectors.

Observations: Four occupational groups are *Competitive*:

- *Transportation & Material Moving* (LQ of 2.84)
- *Food Preparation & Serving* (LQ of 1.04)
- *Production* (LQ of 1.82)
- *Installation, Maintenance & Repair* (LQ of 1.14)

Transportation & Material Moving occupations have increased by more than 162 workers and it is the biggest occupation group in Conecuh County (Table 7.7, Figure 7.7).

Most occupational groups (10) are classified as *Emerging*, or having job growth with local specialization under 1. Job growth in this group has been modest.

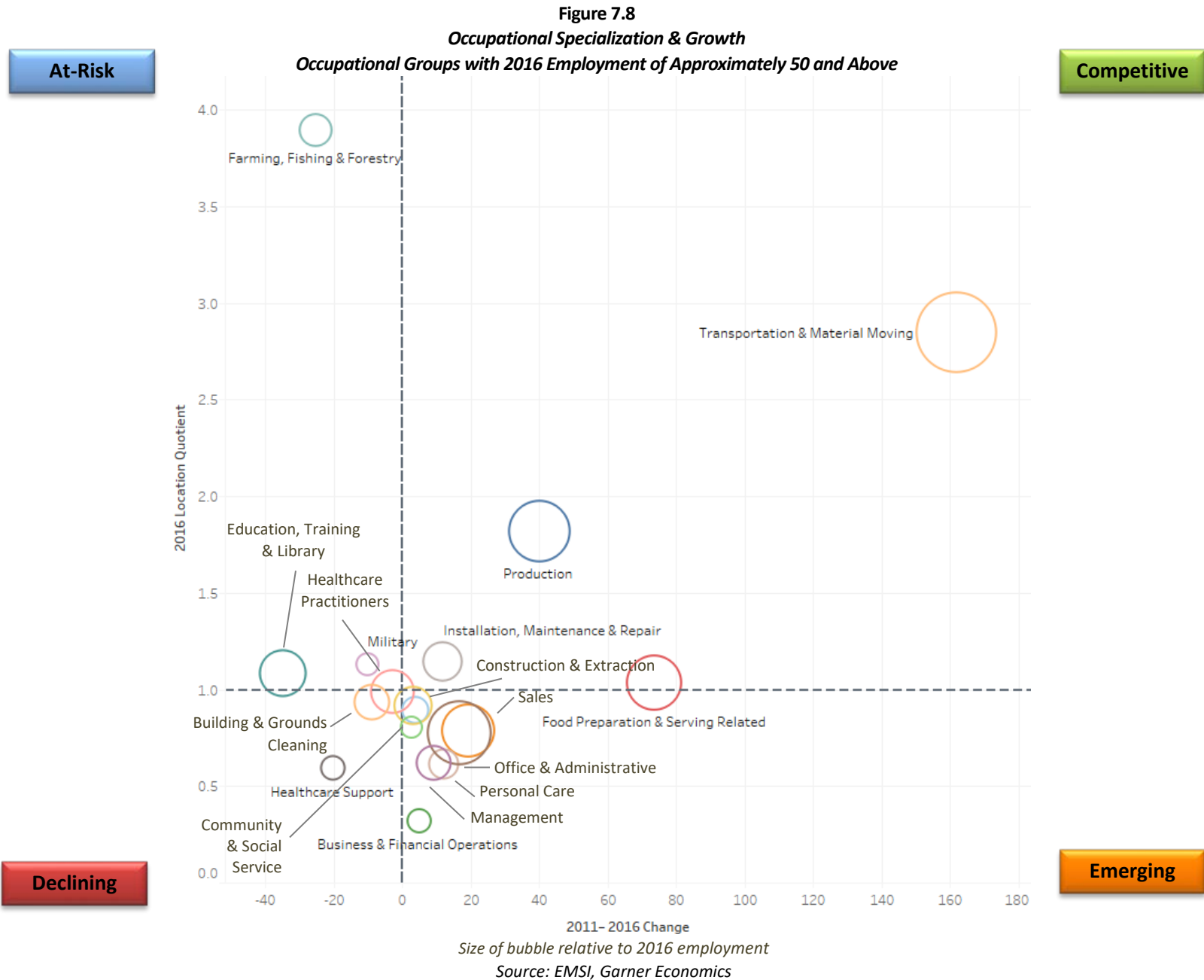
Three occupational groups are *At-Risk* with recent job loss and location quotients over 1: *Military* (-10 jobs/1.13 LQ); *Farming, Fishing & Forestry* (-25 jobs/3.89 LQ); and *Education, Training & Library* (-35 jobs/1.08 LQ).

Additionally, six occupation groups are *Declining* with job loss and low local specialization.

Table 7.8
Occupational Specialization and Growth, 2011–2016

Occupations	2011–2016 Change	2016 Location Quotient	2016 Jobs
Competitive			
Transportation & Material Moving	162	2.84	722
Food Preparation & Serving Related	74	1.04	335
Production	40	1.82	418
Installation, Maintenance & Repair	12	1.14	168
Emerging			
Sales & Related	19	0.79	309
Office & Administrative Support	17	0.77	451
Personal Care & Service	12	0.61	97
Management	9	0.62	131
Business & Financial Operations	5	0.32	62
Architecture & Engineering	4	0.40	25
Protective Service	4	0.89	77
Construction & Extraction	3	0.92	159
Community & Social Service	3	0.80	51
Computer & Mathematical	1	0.14	16
At-Risk			
Military	(10)	1.13	55
Farming, Fishing & Forestry	(25)	3.89	116
Education, Training & Library	(35)	1.08	239
Declining			
Arts, Design, Entertainment, Sports & Media	(1)	0.28	19
Life, Physical & Social Science	(1)	0.44	14
Healthcare Practitioners & Technical	(3)	0.99	208
Legal	(3)	0.32	10
Building & Grounds Cleaning, Maintenance	(9)	0.94	137
Healthcare Support	(20)	0.59	63

Source: EMSI, Garner Economics





Appendix: A: Focus Group Participants

- Judy Baker
- Ola Ball
- Lisa Bartlett
- Jerome Boykin
- Tonya Bozeman
- Lillie Brown
- Russ Brown
- Zickeyous Byrd
- Mayor Terri Carter
- Mike Cartwright
- Dan Cox
- Preston Flame
- Winston Foshee
- Patricia Fowler
- Charles Grant
- Jerome Gray
- Mayor Henry
- Bridget Johnson
- Allen Joyner
- Margie Kirksey
- Daryl Knowles
- Cindy Knowlton
- Mary Moncuas
- Glen Nall
- Councilmember Sharon Nettles
- Tom Nielsen
- Jeff Rhodes
- Connery Salter
- Ron Shumack
- Don Smith
- Mark Walton
- Leon Windham
- Barbara Wolfe
- Mayor Pete Wolff
- Cheryl Womble
- Luther Upton

Commissioners Millender, Campbell, Riley, Andrews, and Byrd attended more than one of the sessions.



Appendix B: Focus Group Responses

Note: The comments listed below are summarized from comments provided by the focus group participants. The comments are reported as they were offered; they may not necessarily be statements of fact, but may be opinions or perceptions. The number in parentheses () indicates the number of focus groups in which the sentiment was shared if it was mentioned in more than one.

1. What are several words or phrases that describe Conecuh County?

Respondents described Conecuh County as rural with a small-town feel. Much of the conversation centered around the lack of jobs and amenities for the population and the high-level of poverty. The groups also mentioned the range of industries present in the county, as well as the strong transportation infrastructure. Specific responses included:

- Lack of industry to employ and retain workers (2)
- High poverty/economically depressed (2)
- Rural (2)
- Lack of retail
- Dirty, roads are littered
- Aging roads/insufficient maintenance
- Averse to change
- Lacking strong medical facilities
- Agricultural
- Home of Conecuh sausage
- Racially divided
- Timber products
- Opportunity for rail
- Small-town environment
- Southern hospitality
- Home
- Range of industries
- Diversity of people

2. What do you think are some of the biggest obstacles that inhibit Conecuh County in its ability to attract, expand, or retain businesses and investment?

All three focus groups noted that the county lacks a strong or prepared workforce. The groups noted a variety of other inhibitors, ranging from resistance to change, lack of cooperation between the county and cities, and a lack of amenities within the community. Specific responses included:

- Weak/unqualified or prepared workforce (3)
- Resistance to change (2)
- Lack of cooperation between county and cities/municipalities
- Lack of entertainment/amenities
- Litter
- High level of government support programs
- High rental rates
- Weak infrastructure
- Lack of Funding
- Surrounding counties are competition
- Lack of diversity where it matters: schools, neighborhoods, attitudes



3. On a scale of 1 to 5, with 5 being best, how would you rate the business climate of Conecuh County?

The three groups combined gave the county an average score of 3.13 (with 3.0 being average). Comments suggest that there is disagreement among stakeholders as to how proactive and effective the county has been in creating a strong business climate. Those ranking the county higher note that the county commissioners are proactive and will “do anything they need to do to encourage business: they are willing to buy land or build buildings.” Conversely, those ranking the county lower suggest that more can be done to leverage the activity along I-65, that the county could be more proactive (they cited examples from surrounding communities), and that the county needs to find more resources to support the schools and other areas that would increase the area’s attractiveness to potential companies.

One focus group noted that the county commissioners do not have much control over the policies with the greatest impact. Much of the policy affecting growth is created at the state or federal level.

4. What do you see as the county’s strengths?

Participants reiterated many of the responses given in question 1 when describing the county. Strengths that were most frequently noted included the area’s geographical location, the airport, the presence of rail, and access to I-65. Other responses centered around Reid State and its programs (especially nursing and welding), the railroad and having a good workforce (with reference made to workers from since closed plants/facilities). Specific responses included:

- | | |
|-----------------|--|
| • Airport (3) | • Beautiful county—landscape |
| • On I-65 (3) | • Liberty Hill cooperative |
| • Location (3) | • Magnet school |
| • Reid Tech (2) | • Dual enrollment and early college programs |
| • Railroad (2) | • Small town |
| • Workforce (2) | • Water |



5. How do you see the current labor situation in the area (both quality and employee attraction and availability)?

Participants noted that it is difficult to retain talent in the county. Some pointed to the brain drain of graduates; others noted that many prefer to live in a rural environment and are willing to out-commute for jobs. There were also many who suggested that something must be done to encourage people to find jobs rather than rely on government subsidies. One participant noted work being done in the high schools to build soft- and career-ready skills. Specific responses included:

- Brain drain (2)
- Many prefer to out-commute to live in a rural community (2)
- Need more workers in trades
- Perception that some prefer government subsidies rather than jobs
- People have to leave the county for good jobs
- Many can't pass a drug test; problems with absenteeism

6. What infrastructure is missing or unsatisfactory in the county?

Many of the responses given were noted in the question on inhibitors to attracting business to the region. Specifically, participants noted the lack of broadband and poor communications infrastructure and the lack of a strong park and recreation infrastructure. Specific responses include:

- Broadband (3)
- Parks and recreation facilities (2)
- Active downtown
- Retail
- Housing (for all income levels)
- Another area to unload freight from rail



7. What would you work to change about the community, not worried about money or politics?

When participants were asked to provide their vision for Conecuh County and/or ideas on what would make it more competitive place for business, the conversations primarily centered around changing attitudes and creating an environment in which the community believes that change is possible. Specific responses included:

- Change attitudes (2)
- Build county's sense of community/unity (2)
- Execute the lake project (2)
- Increase public safety
- Clean up the community
- Create jobs
- Take care of industry already in the county

8. Give some examples of unique and innovative programs or initiatives that you believe are having a positive impact on increasing the competitiveness of the county?

Respondents noted efforts taken to strengthen the workforce at earlier stages. The three education-related examples offered were the opening of the new magnet school, the soft-skills/career-ready program, and efforts at Reid Tech. Additionally, groups mentioned the county initiative at Liberty Hill. Responses provided include:

- Magnet school (3)
- Liberty Hill Cooperative (2)
- Extension with 4-H and youth development
- Programs at Reid State (including nursing)
- Conecuh/Evergreen Veterans project
- Road improvements
- Conecuh sausage
- Knud Nielsen Company
- Ag center
- Starting a conversation about what to do

9. Are there programs in peer/competitor regions that the county should consider for the area? If so, give examples.

Types of programs to emulate included:

- Communities that built up the downtown/historical charm
- Communities that recruited retail
- South Carolina's business incentives
- Communities that believe they can affect change
- Communities with strong business retention and expansion programs
- Splash pad in Brewton
- Andalusia



10. What types of companies do you think would be a good fit for Conecuh County?

Responses centered on building on timber assets and the presence of welders and other trades. Specific responses include:

- Wood and forestry (3)
- Retail development (2)
- Agriculture and food processing (2)
- Fabrication (2)
- Trades (especially welding) (2)
- Automotive manufacturing
- Outdoor recreation/hunting
- Industry servicing retirees
- Trailer manufacturing
- Distribution
- Oil and gas

11. What are your past experiences with, and current perceptions of, the various economic development efforts by group(s) involved in investment attraction, retention, and assisting entrepreneurs? How could these efforts or groups be improved?

Participants noted that communications and cooperation among groups could be improved. They pointed out that there is a perception that the individual communities and the county operate in silos.

Additionally, they noted that the county doesn't have a dedicated "salesperson" to sell Conecuh county to potential business. All groups noted the progress and opportunity of the Liberty Hill development under the Evergreen /Conecuh County capital cooperative improvement district.

12. Are there any other issues of concern to you?

Questions/issues raised included:

- How Conecuh county can build clawbacks into any incentive program
- How to undo the effects of the high-school consolidation (which some note has caused families to send their children (and spending power and taxes) to schools outside the county) (2)

APPENDIX C: ASSETS AND CHALLENGES RANKING DATA AND NOTES

Access to Markets

¹ 500-Mile Radius Results

Geography Name	Year	Total Population
Radius Region	2016	62,747,743

Source: U.S. Census Bureau

² I-65, which runs north/south

³ CSX main line service

⁴ 1:10 hours to the Montgomery Airport; 1:39 to the Mobile Airport

⁵ Middleton Field Airport; No ILS system

⁶ Households and businesses in Conecuh County have limited access to adequate broadband service. Only 31.7 percent of the County has access to service 25 mbps or faster (see the *Broadband* section for more info).

Labor

⁷ LQ of 1.89 and 583 employed.

⁸ LQ of 4.47 and 593 employed.

⁹ LQ of 1.08 and 112 employed.

¹⁰ LQ of 0.62 and 131 employed.

¹¹ 2006–2016 Change in Estimated Average Annual Wage:
(Highest Relative Number Shaded)

	Conecuh County	Alabama	United States
2016 Average Wage	\$33,118	\$42,766	\$51,255
2006–2016 Wage Change	\$4,515	\$7,945	\$10,455
2006–2016 Percent Wage Change	15.8%	22.8%	25.6%

Source: EMSI, Garner Economics

¹² Reid State Technical College <http://www.rstc.edu/>

¹³ AIDT

Access to Resources

¹⁴ According to the U.S. Ag Census, Conecuh County ranks 55 out of 67 counties in the value of ag products sold.

¹⁵ According to the AL Oil and Gas Board:

State of Alabama Oil & Gas Board Data

Oil wells (Active or Producing)	140
Most common	160 acre (Drilling Unit Acres)
Top Operators:	
Pruet Production Co	98 Active or Producing Wells
Sklar Exploration Company	41 Active or Producing Wells
Total Active/Producing wells	152
Total wells	410
www.qsa.state.al.us/oqb/wells (State of Alabama Oil and Gas Board)	

Description	Forestry Logging 113)	and (NAICS 321)	Wood Product Manufacturing (NAICS 321)	Total
2016 Jobs	165		52	218
2016 Location Quotient	80.49		5.21	
2011 Jobs	207		84	291
2011 Location Quotient	101.45		9.55	
2011–2016 Change	(42)		(32)	(73)
2011– 2016 % Change	(20%)		(38%)	(25%)

¹⁶ LQ of 1.89 and 583 employed

¹⁷ An average LQ of 0.60

¹⁸ Primarily within the City of Evergreen. Evergreen sells water to other jurisdictions wholesale. Water: 8-inch mains with ability to serve up to 500,000 gallons per day to any site.

Sewer: 6-inch mains with ability to serve up to any amount of discharge equal to water consumption gallons, per day.

Access to Space

¹⁹ <http://www.evergreenal.org/available-sites.html>

²⁰ Liberty Hill development <http://www.evergreenal.org/liberty-hill.html>

Government Impact on Business

²¹ ACT measures of College Readiness show that Conecuh County is far below state and national achievement against these standardized benchmarks.

²² County Commission gets high marks from focus groups participants as pro-business.

²³ http://www.tax-rates.org/alabama/conecuh_county_property_tax

²⁴ Zillow.com was not showing any available properties for sale greater than \$200,000.

²⁵ Zillow.com was showing 19 properties for sale within the range of \$50,000–\$199,999 as of 8/26/2017.

²⁶ Apartments.com shows less than 15 available properties for rent as of 8/26/2017.

²⁷ The composite Cost-of-Living Index for the City of Evergreen is 82 compared with 89 for Alabama and a national average of 100. Evergreen has an exceptionally low *Housing* index cost of 43 and relatively low cost in the *Health Care* and *Utilities* categories (see more info within this document).

Quality of Place

²⁸ Conecuh County has the lowest property crime rate (154.3 incidents per 10,000 residents) of the benchmarks. The county has a violent crime rate of 44 reported incidents per 10,000 residents, which is above the national level but under Alabama's 47.2 rate.

²⁹ Limited activity <http://www.evergreenal.org/things-to-do.html>

³⁰ <http://evergreenmedical.org/about/our-hospital/>

³¹ Downtown Evergreen's CBD shows a high vacancy rate of commercial space.

Appendix C: 2016 Conecuh County, Alabama, Industry Details

Specialized industries are highlighted **light blue** for location quotients greater than 1.20 and **orange** for location quotients above 5.

NAICS	Description	2016 Location Quotient	2016 Jobs	2011–2016 Change	Average Wages 2016
11	Crop and Animal Production	3.88	186	(47)	\$40,624
111	Crop Production	0.08	<10	Insf. Data	Insf. Data
113	Forestry and Logging	81.04	167	-40	\$42,434
114	Fishing, Hunting and Trapping	0.93	<10	Insf. Data	Insf. Data
115	Support Activities for Agriculture and Forestry	1.19	16	-2	\$24,744
21	Mining, Quarrying, Oil & Gas Extraction	0.67	11	11	\$50,159
211	Oil and Gas Extraction	1.17	<10	Insf. Data	Insf. Data
212	Mining (except Oil and Gas)	1.23	<10	Insf. Data	Insf. Data
22	Utilities	1.45	20	4	\$36,799
23	Construction	0.61	128	(4)	\$27,426
236	Construction of Buildings	0.50	25	-3	\$26,431
237	Heavy and Civil Engineering Construction	0.46	11	-4	\$46,979
238	Specialty Trade Contractors	0.68	92	3	\$25,287
31	Manufacturing	1.89	583	43	\$35,155
311	Food Manufacturing	2.93	112	-30	\$29,640
314	Textile Product Mills	20.76	63	45	\$20,989
315	Apparel Manufacturing	0.15	<10	Insf. Data	Insf. Data
321	Wood Product Manufacturing	5.19	52	-32	\$32,505
324	Petroleum and Coal Products Manufacturing	3.17	<10	Insf. Data	Insf. Data
325	Chemical Manufacturing	0.25	<10	Insf. Data	Insf. Data
326	Plastics and Rubber Products Manufacturing	1.66	29	29	\$35,587
327	Nonmetallic Mineral Product Manufacturing	2.38	24	-10	\$58,578
332	Fabricated Metal Product Manufacturing	3.45	122	22	\$38,585
336	Transportation Equipment Manufacturing	2.92	117	89	\$37,811
339	Miscellaneous Manufacturing	3.22	50	-4	\$27,219
42	Wholesale Trade	1.07	158	118	\$56,375
423	Merchant Wholesalers, Durable Goods	1.88	139	98	\$57,958

424	Merchant Wholesalers, Nondurable Goods	0.14	<10	Insf. Data	Insf. Data
425	Wholesale Electronic Markets and Agents and Brokers	0.54	12	12	\$35,474
44	Retail Trade	0.74	301	(5)	\$20,964
441	Motor Vehicle and Parts Dealers	0.30	15	-4	\$25,058
442	Furniture and Home Furnishings Stores	0.30	<10	Insf. Data	Insf. Data
443	Electronics and Appliance Stores	0.14	<10	Insf. Data	Insf. Data
444	Building Material and Garden Equipment and Supplies Dealers	0.25	<10	Insf. Data	Insf. Data
445	Food and Beverage Stores	1.18	91	0	\$16,884
446	Health and Personal Care Stores	0.78	21	-4	\$49,429
447	Gasoline Stations	5.23	119	15	\$19,471
448	Clothing and Clothing Accessories Stores	0.02	<10	Insf. Data	Insf. Data
452	General Merchandise Stores	0.40	32	-3	\$15,679
453	Miscellaneous Store Retailers	0.31	<10	Insf. Data	Insf. Data
454	Nonstore Retailers	0.07	<10	Insf. Data	Insf. Data
48	Transportation & Warehousing	4.47	593	154	\$42,715
482	Rail Transportation	1.28	<10	Insf. Data	Insf. Data
484	Truck Transportation	12.31	503	140	\$42,076
486	Pipeline Transportation	2.39	<10	Insf. Data	Insf. Data
488	Support Activities for Transportation	0.07	<10	Insf. Data	Insf. Data
492	Couriers and Messengers	4.89	78	22	\$41,916
51	Information	0.28	20	(1)	\$35,890
511	Publishing Industries (except Internet)	0.47	<10	Insf. Data	Insf. Data
515	Broadcasting (except Internet)	0.18	<10	Insf. Data	Insf. Data
517	Telecommunications	0.49	<10	Insf. Data	Insf. Data
52	Finance & Insurance	0.30	46	(8)	\$38,586
522	Credit Intermediation and Related Activities	0.58	37	-6	\$35,509
524	Insurance Carriers and Related Activities	0.14	<10	Insf. Data	Insf. Data
531	Real Estate	0.12	<10	Insf. Data	Insf. Data
54	Professional, Scientific & Technical Services	0.11	27	0	\$33,516
541	Professional, Scientific, and Technical Services	0.11	27	0	\$33,516
56	Administrative & Support, Waste Management & Remediation Services	0.46	112	13	\$24,035
561	Administrative and Support Services	0.47	109	19	\$24,261
562	Waste Management and Remediation Services	0.32	<10	Insf. Data	Insf. Data

61	Educational Services	0.38	38	6	\$19,564
62	Health Care & Social Assistance	0.77	375	(22)	\$36,860
621	Ambulatory Health Care Services	0.60	108	-39	\$46,890
622	Hospitals	1.74	210	71	\$35,488
623	Nursing and Residential Care Facilities	0.27	22	-64	\$34,797
624	Social Assistance	0.34	35	10	\$15,270
71	Arts, Entertainment & Recreation	0.14	<10	0	0
711	Performing Arts, Spectator Sports, and Related Industries	0.23	<10	Insf. Data	Insf. Data
713	Amusement, Gambling, and Recreation Industries	0.11	<10	Insf. Data	Insf. Data
72	Accommodation & Food Services	1.04	344	73	\$11,835
721	Accommodation	0.58	28	-21	\$14,762
722	Food Services and Drinking Places	1.12	316	94	\$11,575
81	Other Services	0.69	128	(12)	\$19,781
811	Repair and Maintenance	0.91	38	-19	\$28,232
812	Personal and Laundry Services	0.92	48	4	\$20,234
813	Religious, Grantmaking, Civic, Professional, and Similar Organizations	0.47	33	5	\$12,806
814	Private Households	0.43	<10	Insf. Data	Insf. Data
90	Government	1.34	798	(54)	\$34,613
901	Federal Government	0.69	82	-10	\$28,247
902	State Government	1.62	210	-39	\$39,444
903	Local Government	1.45	506	-6	\$33,636
999	Total All Industries		3,883	259	\$33,118

Source: EMSI, Garner Economics

Appendix: 2016 Conecuh County, Alabama, Occupation Details

Specialized industries are highlighted light blue for location quotients greater than 1.20 and orange for location quotients above 5.

SOC	Description	2016 Location Quotient	2016 Jobs	2011–2016 Change	Avg. Hourly Earnings
11-2000	Advertising, Marketing, Promotions, Public Relations, and Sales Managers	0.24	<10	Insf. Data	Insf. Data
11-3000	Operations Specialties Managers	0.49	21	3	\$42.63
11-9000	Other Management Occupations	0.63	54	-4	\$27.51
11-0000	Management	0.62	131	9	\$35.33
11-1000	Top Executives	0.81	52	8	\$39.50
13-0000	Business & Financial Operations	0.32	62	5	\$22.90
13-1000	Business Operations Specialists	0.31	38	3	\$23.64
13-2000	Financial Specialists	0.33	24	2	\$21.67
15-0000	Computer & Mathematical	0.14	16	1	\$24.09
15-1100	Computer Occupations	0.15	15	1	\$23.98
15-2000	Mathematical Science Occupations	0.12	<10	Insf. Data	Insf. Data
17-0000	Architecture & Engineering	0.40	25	4	\$33.45
17-1000	Architects, Surveyors, and Cartographers	0.17	<10	Insf. Data	Insf. Data
17-2000	Engineers	0.41	17	4	\$38.70
17-3000	Drafters, Engineering Technicians, and Mapping Technicians	0.44	<10	Insf. Data	Insf. Data
19-0000	Life, Physical & Social Science	0.44	14	-1	\$26.32
19-1000	Life Scientists	0.64	<10	Insf. Data	Insf. Data
19-2000	Physical Scientists	0.39	<10	Insf. Data	Insf. Data
19-3000	Social Scientists and Related Workers	0.35	<10	Insf. Data	Insf. Data
19-4000	Life, Physical, and Social Science Technicians	0.39	<10	Insf. Data	Insf. Data
21-0000	Community & Social Service	0.80	51	3	\$17.98
21-1000	Counselors, Social Workers, and Other Community and Social Service Specialists	0.76	39	0	\$19.14
21-2000	Religious Workers	1.00	12	Insf. Data	\$13.92
23-0000	Legal	0.32	10	-3	\$27.91
23-1000	Lawyers, Judges, and Related Workers	0.37	<10	Insf. Data	Insf. Data

23-2000	Legal Support Workers	0.21	<10	Insf. Data	Insf. Data
25-0000	Education, Training & Library	1.08	239	-35	\$21.18
25-1000	Postsecondary Teachers	1.01	37	-3	\$30.45
25-2000	Preschool, Primary, Secondary, and Special Education School Teachers	1.12	116	-21	\$25.57
25-3000	Other Teachers and Instructors	1.71	60	-10	\$10.05
25-4000	Librarians, Curators, and Archivists	1.19	<10	Insf. Data	Insf. Data
25-9000	Other Education, Training, and Library Occupations	0.46	18	-2	\$11.18
27-0000	Arts, Design, Entertainment, Sports & Media	0.28	19	-1	\$14.84
27-1000	Art and Design Workers	0.23	<10	Insf. Data	Insf. Data
27-2000	Entertainers and Performers, Sports and Related Workers	0.37	<10	Insf. Data	Insf. Data
27-3000	Media and Communication Workers	0.25	<10	Insf. Data	Insf. Data
27-4000	Media and Communication Equipment Workers	0.25	<10	Insf. Data	Insf. Data
29-0000	Healthcare Practitioners & Technical	0.99	208	-3	\$25.14
29-1000	Health Diagnosing and Treating Practitioners	0.91	119	11	\$32.01
29-2000	Health Technologists and Technicians	1.15	86	-14	\$15.93
29-9000	Other Healthcare Practitioners and Technical Occupations	0.81	<10	Insf. Data	Insf. Data
31-0000	Healthcare Support	0.59	63	-20	\$11.21
31-1000	Nursing, Psychiatric, and Home Health Aides	0.68	43	-20	\$9.98
31-2000	Occupational Therapy and Physical Therapist Assistants and Aides	1.01	<10	Insf. Data	Insf. Data
31-9000	Other Healthcare Support Occupations	0.41	16	-2	\$11.70
33-0000	Protective Service	0.89	77	4	\$15.75
33-1000	Supervisors of Protective Service Workers	0.89	<10	Insf. Data	Insf. Data
33-2000	Fire Fighting and Prevention Workers	0.72	<10	Insf. Data	Insf. Data
33-3000	Law Enforcement Workers	1.62	51	1	\$16.60
33-9000	Other Protective Service Workers	0.36	14	2	\$9.96
35-0000	Food Preparation & Serving Related	1.04	335	74	\$8.52
35-1000	Supervisors of Food Preparation and Serving Workers	1.11	29	6	\$11.54
35-2000	Cooks and Food Preparation Workers	1.07	87	13	\$8.55
35-3000	Food and Beverage Serving Workers	1.11	199	48	\$8.11
35-9000	Other Food Preparation and Serving Related Workers	0.54	19	7	\$8.02
37-0000	Building & Grounds Cleaning, Maintenance	0.94	137	-9	\$10.16
37-1000	Supervisors of Building and Grounds Cleaning and Maintenance Workers	1.57	14	0	\$16.82
37-2000	Building Cleaning and Pest Control Workers	0.79	82	-4	\$8.80
37-3000	Grounds Maintenance Workers	1.19	41	-5	\$10.40
39-0000	Personal Care & Service	0.61	97	12	\$9.25

39-1000	Supervisors of Personal Care and Service Workers	0.57	<10	Insf. Data	Insf. Data
39-2000	Animal Care and Service Workers	0.61	<10	Insf. Data	Insf. Data
39-3000	Entertainment Attendants and Related Workers	0.32	<10	Insf. Data	Insf. Data
39-4000	Funeral Service Workers	1.46	<10	Insf. Data	Insf. Data
39-5000	Personal Appearance Workers	1.38	34	8	\$9.67
39-7000	Tour and Travel Guides	0.17	-	0	Insf. Data
39-9000	Other Personal Care and Service Workers	0.48	48	4	\$8.23
41-0000	Sales & Related	0.79	309	19	\$10.89
41-1000	Supervisors of Sales Workers	0.80	35	-7	\$15.49
41-2000	Retail Sales Workers	1.01	225	10	\$8.39
41-3000	Sales Representatives, Services	0.24	13	0	\$16.34
41-4000	Sales Representatives, Wholesale and Manufacturing	0.64	29	16	\$21.46
41-9000	Other Sales and Related Workers	0.25	<10	Insf. Data	Insf. Data
43-0000	Office & Administrative Support	0.77	451	17	\$12.89
43-1000	Supervisors of Office and Administrative Support Workers	0.55	20	0	\$20.22
43-2000	Communications Equipment Operators	0.39	<10	Insf. Data	Insf. Data
43-3000	Financial Clerks	0.81	68	-1	\$12.93
43-4000	Information and Record Clerks	0.54	77	-3	\$12.21
43-5000	Material Recording, Scheduling, Dispatching, and Distributing Workers	0.86	87	12	\$13.91
43-6000	Secretaries and Administrative Assistants	1.08	112	2	\$13.65
43-9000	Other Office and Administrative Support Workers	0.77	86	6	\$9.73
45-0000	Farming, Fishing & Forestry	3.89	116	-25	\$15.15
45-1000	Supervisors of Farming, Fishing, and Forestry Workers	7.15	<10	Insf. Data	Insf. Data
45-2000	Agricultural Workers	0.51	13	-2	\$10.68
45-3000	Fishing and Hunting Workers	0.99	<10	Insf. Data	Insf. Data
45-4000	Forest, Conservation, and Logging Workers	53.25	93	-22	\$15.63
47-0000	Construction & Extraction	0.92	159	3	\$14.30
47-1000	Supervisors of Construction and Extraction Workers	0.96	15	-1	\$21.84
47-2000	Construction Trades Workers	0.82	111	2	\$13.51
47-3000	Helpers, Construction Trades	0.46	<10	Insf. Data	Insf. Data
47-4000	Other Construction and Related Workers	2.56	27	2	\$13.39
47-5000	Extraction Workers	0.51	<10	Insf. Data	Insf. Data
49-0000	Installation, Maintenance & Repair	1.14	168	12	\$17.37
49-1000	Supervisors of Installation, Maintenance, and Repair Workers	1.24	14	1	\$23.37
49-2000	Electrical and Electronic Equipment Mechanics, Installers, and Repairers	0.52	<10	Insf. Data	Insf. Data

49-3000	Vehicle and Mobile Equipment Mechanics, Installers, and Repairers	1.51	66	0	\$14.44
49-9000	Other Installation, Maintenance, and Repair Occupations	1.05	80	10	\$18.01
51-0000	Production	1.82	418	40	\$13.96
51-1000	Supervisors of Production Workers	1.15	17	2	\$25.13
51-2000	Assemblers and Fabricators	1.80	81	25	\$12.06
51-3000	Food Processing Workers	3.06	62	-13	\$13.53
51-4000	Metal Workers and Plastic Workers	1.87	90	32	\$14.25
51-5100	Printing Workers	0.10	<10	Insf. Data	Insf. Data
51-6000	Textile, Apparel, and Furnishings Workers	2.52	40	-6	\$9.57
51-7000	Woodworkers	3.96	27	-7	\$10.65
51-8000	Plant and System Operators	1.51	12	-2	\$21.40
51-9000	Other Production Occupations	1.37	89	8	\$15.69
53-0000	Transportation & Material Moving	2.84	722	162	\$15.34
53-1000	Supervisors of Transportation and Material Moving Workers	3.00	30	8	\$22.19
53-2000	Air Transportation Workers	0.27	<10	Insf. Data	Insf. Data
53-3000	Motor Vehicle Operators	4.74	504	117	\$16.52
53-4000	Rail Transportation Workers	1.14	<10	Insf. Data	Insf. Data
53-5000	Water Transportation Workers	0.17	<10	Insf. Data	Insf. Data
53-6000	Other Transportation Workers	0.44	<10	Insf. Data	Insf. Data
53-7000	Material Moving Workers	1.53	177	37	\$10.56
55-0000	Military	1.13	55	-10	\$19.14

Source: EMSI, Garner Economics