

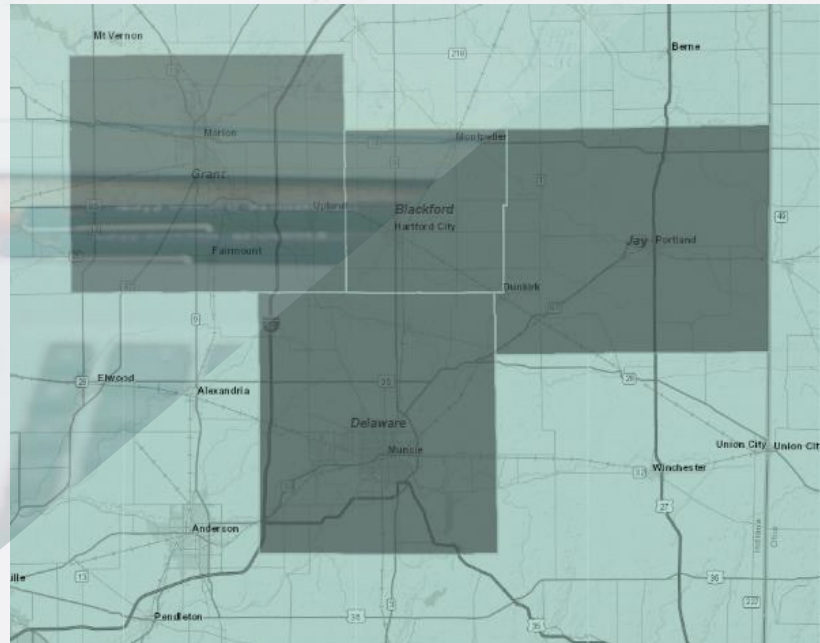
East Central Indiana Regional Planning District

Defense And Security Cluster Drill-down

Section 01



Economic indicators



Economic Indicators	East Central Indiana Regional Planning District (QCEW, non-QCEW, self-employed and proprietors)
Jobs 2023 (% of total jobs)	2,352 (2%)
Job change 2018-2023 (#, %)	+74 (3.4%)
Average total earnings per job 2023	\$65,621
Cost of Living (COL)	93.2
Est. Establishment 2023 (% of total est.)	102 (2.4%)
GRP (Gross Regional Product) 2023	\$283.9 Million
GRP per job 2023 (productivity)	\$120,718
Total purchases 2023	\$233.7 Million
<i>Within region</i>	42%
<i>Imported from outside of region & state</i>	58%
Number of sectors in defense and security cluster	37

Section 02



Competitiveness, economic leakages and Workforce

Regional Job Growth:

Three Key Components of the Shift-Share Analysis

Expected Change

The sum of the industrial mix and the national growth effects



National Growth Effect

Explains how much of the regional industry's growth is explained by the overall growth of the national economy

Industrial Mix Effect

Share of regional industry growth explained by the growth of the specific industry sector at the national level







Regional Competitive Effect

Explains how much of the change in a given industry is due to some unique competitive advantage that the region possesses

Note:

The calculations ensure no double counting of job change effects from national to regional levels

Shift-Share Analysis (Regional Performance) by Top Industry Sectors

Industries	Jobs 2023	National Trend 2018-2023 (A)	Industry Trend 2018-2023 (B)	Cumulative Expected Growth (C=A+B)	Actual Job Growth 2018-2023 (D)	Regional Performance 2018-2023 (D-C)
Federal Government, Military	521	52	-63	-11	-77	-67
Computer Facilities Management Services	451	26	1	26	159	133 
Custom Computer Programming Services	353	32	35	67	-14	-82
Motor Vehicle Supplies and New Parts Merchant Wholesalers	248	20	-7	13	16	3 
Computer Systems Design Services	158	19	11	31	-65	-95
Automobile and Other Motor Vehicle Merchant Wholesalers	144	10	4	14	26	11 
Other Personal and Household Goods Repair and Maintenance	111	11	-17	-6	-12	-6
Aircraft Engine and Engine Parts Manufacturing	64	5	-5	1	5	4 
Security Systems Services (except Locksmiths)	58	5	-1	5	-4	-9
Research and Development in the Physical, Engineering, and Life Sciences (except Nanotechnology and Biotechnology)	37	2	5	7	13	6 
Security Guards and Patrol Services	34	3	-1	2	5	3 
Power and Communication Line and Related Structures Construction	32	7	11	18	-51	-69
Investigation Services	12	1	0	1	0	0
Locksmiths	10	1	0	0	0	0
Armored Car Services	<10	1	-3	-2	Insf. Data	-7

Note: Upward arrow  indicates regional competitiveness.

Shift-Share Analysis 2023

Industries that Outperformed

- Computer Facilities Management Services
- Motor Vehicle Supplies and New Parts Merchant Wholesalers
- Automobile and Other Motor Vehicle Merchant Wholesalers
- Aircraft Engine and Engine Parts Manufacturing
- Security Guards and Patrol Services
- Research and Development in the Physical, Engineering, and Life Sciences (except Nanotechnology and Biotechnology)

- A few relatively strong industry sectors include Federal Government, Military with 500 plus jobs and Computer Facilities Management Services with over 400 jobs in 2023.
- Computer Facilities Management Services has a large competitive shift value of +133.

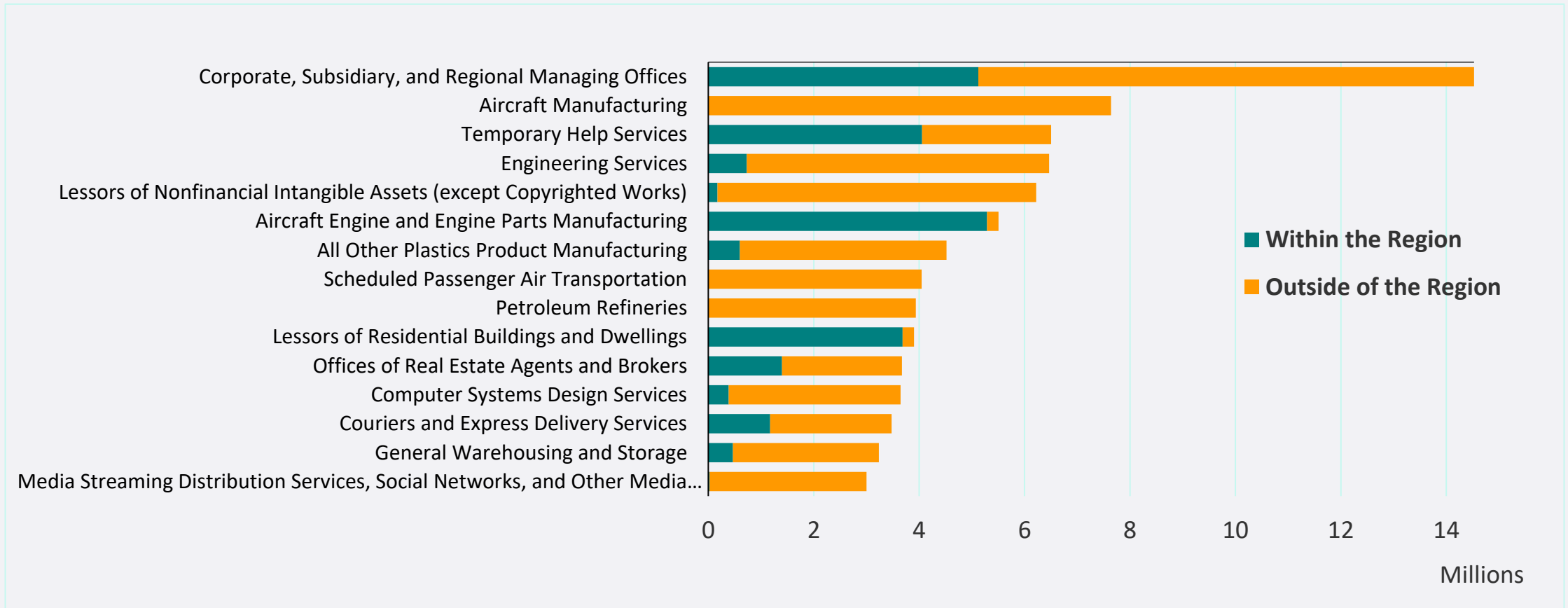
Industries that Underperformed

- Federal Government, Military
- Custom Computer Programming Services
- Computer Systems Design Services
- Other Personal and Household Goods Repair and Maintenance
- Power and Communication Line and Related Structures Construction
- Security Systems Services (except Locksmiths)
- Armored Car Services
- Investigation Services
- Locksmiths

Leakage analysis: Top 15 Industries by Inputs

Industries	Estimated Input (\$ Million), 2023	% In-Region	% Out of Region
Corporate, Subsidiary, and Regional Managing Offices	\$14,527,120	35.3%	64.7%
Aircraft Manufacturing	\$7,637,709	0.0%	100.0%
Temporary Help Services	\$6,502,346	62.4%	37.6%
Engineering Services	\$6,464,632	11.3%	88.7%
Lessors of Nonfinancial Intangible Assets (except Copyrighted Works)	\$6,220,064	2.8%	97.2%
Aircraft Engine and Engine Parts Manufacturing	\$5,505,917	96.1%	3.9%
All Other Plastics Product Manufacturing	\$4,518,033	13.2%	86.8%
Scheduled Passenger Air Transportation	\$4,048,416	0.1%	99.9%
Petroleum Refineries	\$3,938,196	0.0%	100.0%
Lessors of Residential Buildings and Dwellings	\$3,903,619	94.4%	5.6%
Offices of Real Estate Agents and Brokers	\$3,671,202	38.0%	62.0%
Computer Systems Design Services	\$3,645,794	10.6%	89.4%
Couriers and Express Delivery Services	\$3,477,028	33.7%	66.3%
General Warehousing and Storage	\$3,235,085	14.5%	85.5%
Media Streaming Distribution Services, Social Networks, and Other Media Networks and Content Providers	\$3,002,446	0.9%	99.1%

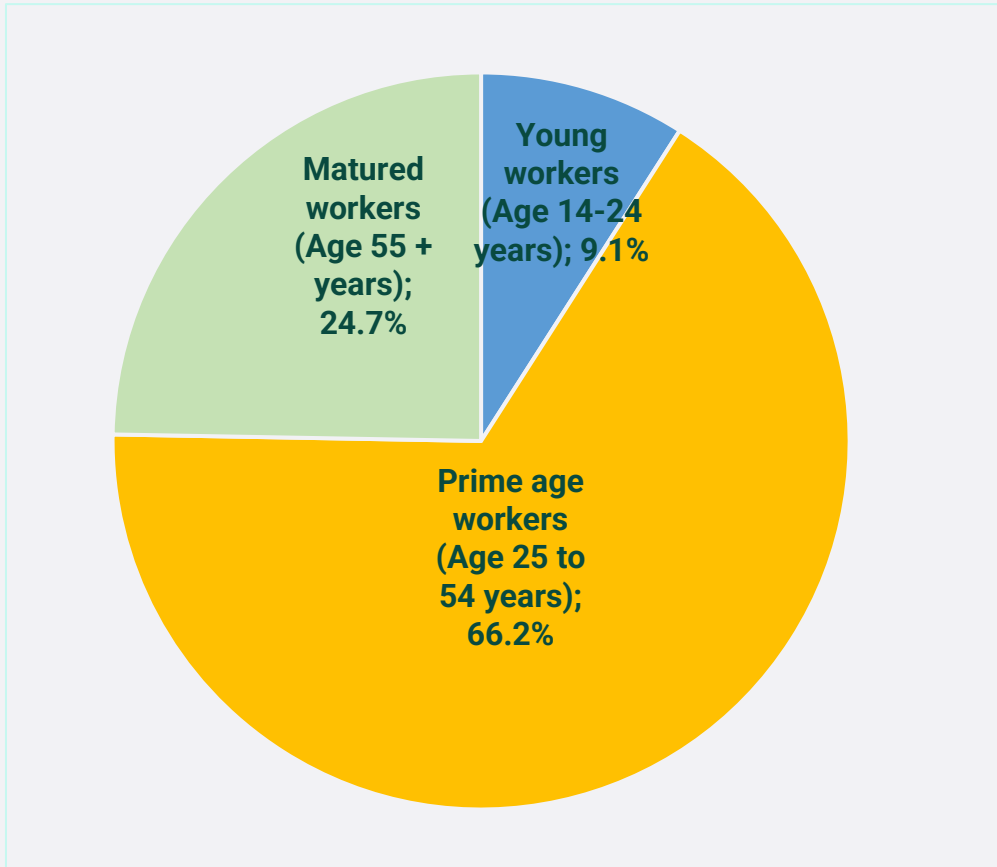
Leakage analysis 2023



- Four industries rely entirely on supply outside the region with more than 99%: a) Aircraft Manufacturing, b) Scheduled Passenger Air Transportation, c) Petroleum Refineries, and d) Media Streaming Distribution Services, Social Networks, and Other Media Networks and Content Providers.

Occupations	Jobs 2023	% Change 2018-2023	% of Total Jobs in Cluster 2023	Median Hour Earnings	Entry level Education	Automation
Military-only occupations	272	-6%	11.6%	\$23.43	N/A	N/A
Software Developers	120	10%	5.1%	\$46.25	Bachelor's degree	80.2
Computer User Support Specialists	81	-23%	3.5%	\$23.81	Some college, no degree	82.9
Computer Systems Analysts	60	-25%	2.6%	\$38.79	Bachelor's degree	81.7
Bus and Truck Mechanics and Diesel Engine Specialists	53	36%	2.2%	\$26.44	High school diploma or equivalent	114.6
General and Operations Managers	52	4%	2.2%	\$44.48	Bachelor's degree	82.2
Sales Representatives, Wholesale and Manufacturing, Except Technical and Scientific Products	50	4%	2.1%	\$29.54	High school diploma or equivalent	91.5
Sales Representatives of Services, Except Advertising, Insurance, Financial Services, and Travel	48	60%	2.1%	\$24.44	High school diploma or equivalent	96.7
Light Truck Drivers	48	30%	2.0%	\$17.82	High school diploma or equivalent	112.9
Computer and Information Systems Managers	44	38%	1.9%	\$55.93	Bachelor's degree	79.9
Security and Fire Alarm Systems Installers	38	46%	1.6%	\$22.91	High school diploma or equivalent	113.2
Computer Occupations, All Other	38	4%	1.6%	\$39.83	Bachelor's degree	85.5
Customer Service Representatives	38	16%	1.6%	\$16.64	High school diploma or equivalent	96.4
Security Guards	34	12%	1.5%	\$17.32	High school diploma or equivalent	109.8
Office Clerks, General	34	-17%	1.4%	\$17.84	High school diploma or equivalent	102

Worker demographics 2023



- Hispanic workers (6%)
- Black or African-American workers (4%)
- Asian workers (3%)
- White workers (87%)
- American Indian or Alaska Native (0.06%)
- Others (0%)

- Male workers (71%)
- Female workers (29%)

- Around one in four workers (24.7%) are matured (aged 55 years or more) workers in ECIRPD in this cluster. Young workers are only 9.1% of the labor force. Talent pipeline strategies are needed.

Section 03

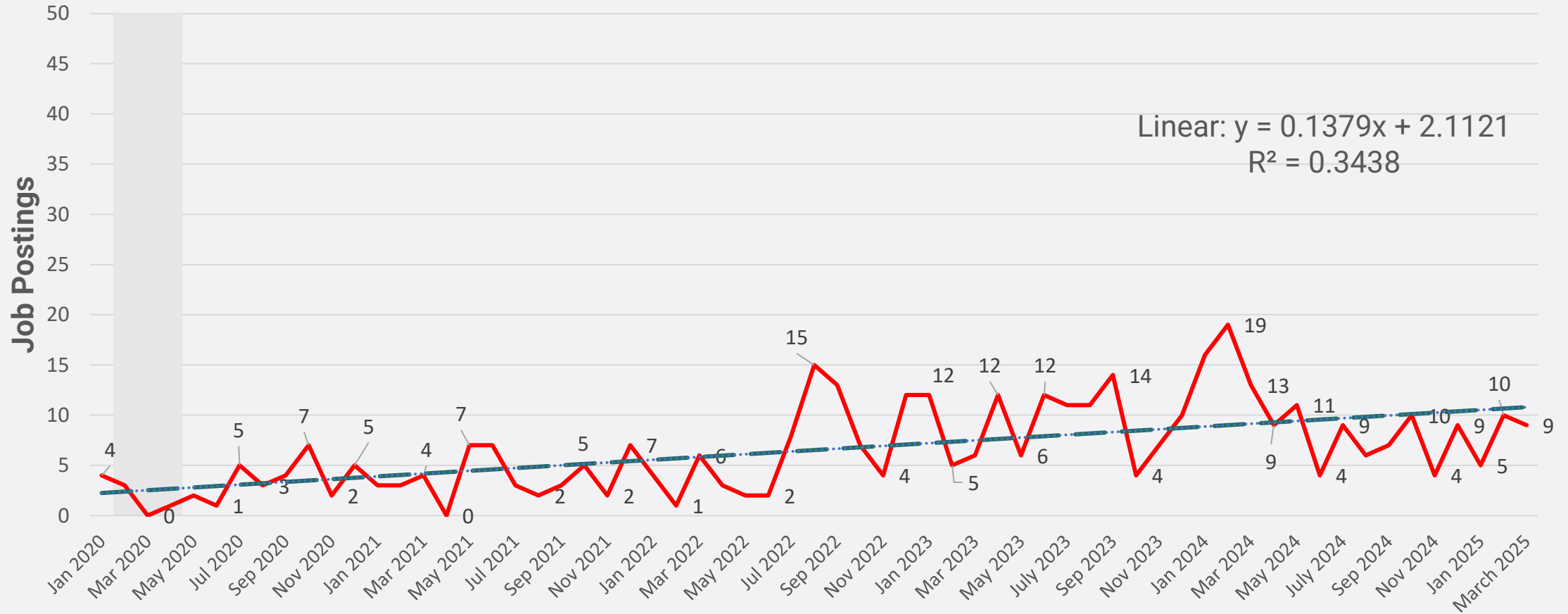


Jobs Postings (Labor demand)

Defense and Security Cluster Jobs Postings Overview

- From January 2020 to March 2025, a total of 1,804 unique jobs postings happened in industries within the Defense and Security cluster. The average monthly unique jobs postings was 28 per month.
- The median posting duration was 23 days. Posting intensity was 2:1.
- Percent change between **January 2020 and March 2025** was **125%**.
- 165 employers in Defense and Security cluster competed for talent during this period.
- Hourly median advertised salary was \$19.51 per hour (23% postings included salaries)
- Job postings were advertised in 37 different industries within ECIRPD Region. **Search, Detection, Navigation, Guidance, Aeronautical, and Nautical System and Instrument Manufacturing, Security Guards and Patrol Services, and Custom Computer Programming Services** had more than 300 unique jobs postings during **January 2020 and March 2025**.
- Top companies in Defense and Security cluster posting jobs include Honeywell International, Allied Universal, Securitas, Belle Tire, GKN, and Bayer.

Defense and Security Cluster: Job Postings Time Series (Jan 2020 to March 2025)



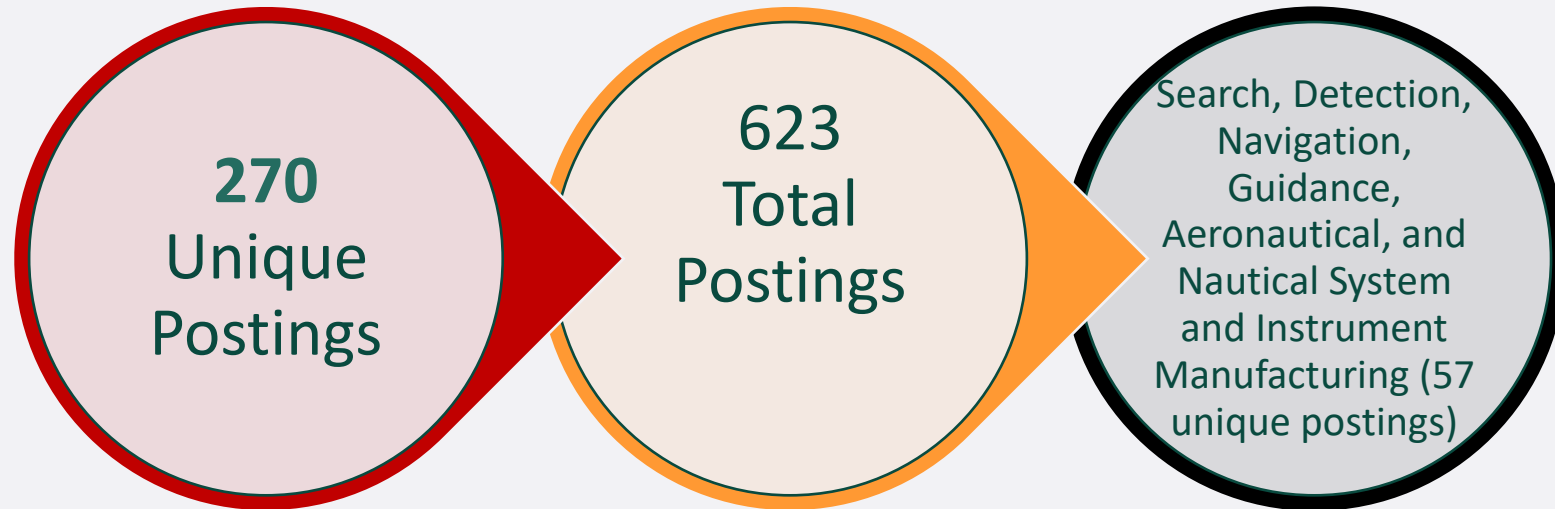
- Unique jobs postings are not seasonally adjusted and hence may show seasonal effects. Jobs postings are in a recovery and growth mode following the COVID-19 induced recession (February 2020 to April 2020).

Defense and Security Cluster Latest Unique Jobs Postings

**Latest 1-Month
Unique Jobs
Postings
February 2025 –
March 2025**



**Latest 12-Month
Unique Jobs
Postings
March 2024 –
March 2025**



Top Companies Postings

1. Honeywell International
2. Allied Universal
3. Securitas
4. Belle Tire
5. GKN
6. Bayer
7. Internal Data Resources
8. GardaWorld
9. MasTec
10. Motrex

Top Industries

1. Search, Detection, Navigation, Guidance, Aeronautical, and Nautical System and Instrument Manufacturing
2. Security Guards and Patrol Services
3. Custom Computer Programming Services
4. Tire and Tube Merchant Wholesalers
5. Other Computer Related Services
6. Aircraft Engine and Engine Parts Manufacturing
7. Research and Development in the Physical, Engineering, and Life Sciences (except Nanotechnology and Biotechnology)
8. Computer Systems Design Services
9. Power and Communication Line and Related Structures Construction
10. Military Armored Vehicle, Tank, and Tank Component Manufacturing

○ Farmers, farm hand and manual worker jobs advertisements are based on analog and not online services.

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