JOB QUALITY and COMMUNITY WELL-BEING

in Mississippi and Alabama's Manufacturing Facilities

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EXECUTIVE SUMMARY

Many elected officials and business groups throughout the South have touted the use of tax breaks and other government policies and subsidies to attract new manufacturing facilities as one of the best ways to address the region's high poverty and unemployment problems. This report evaluates the strengths and weaknesses of that argument by examining dimensions of job quality in the southern states of Mississippi and Alabama.

Manufacturing is big business in these southern states. Global firms and local suppliers employ thousands of workers who assemble and manufacture goods for industries ranging from aerospace to office furniture. The marquee facilities like Mercedes or GE Aviation and their myriad suppliers are recruited to the region by economic development officials and local politicians in search of economic growth. However, despite decades of firm recruitment and continued growth of their manufacturing sectors, communities in Mississippi and Alabama continue to struggle along key indicators such as poverty and childhood well-being. Furthermore, little is known about the working conditions and personal experiences of those employed by these manufacturing facilities.

This report seeks to shed light on the lived experiences of manufacturing workers in Mississippi and Alabama to better understand the impact these facilities have on local individuals, communities, and economies. The report investigates a range of attributes or measurable dimensions of job quality through the analysis of data collected from

more than 1,300 employees at manufacturing facilities in Mississippi and Alabama. These dimensions are assembled into a job quality assessment framework, and then used to assess the overall quality of jobs offered by the two-state region's manufacturing sector.

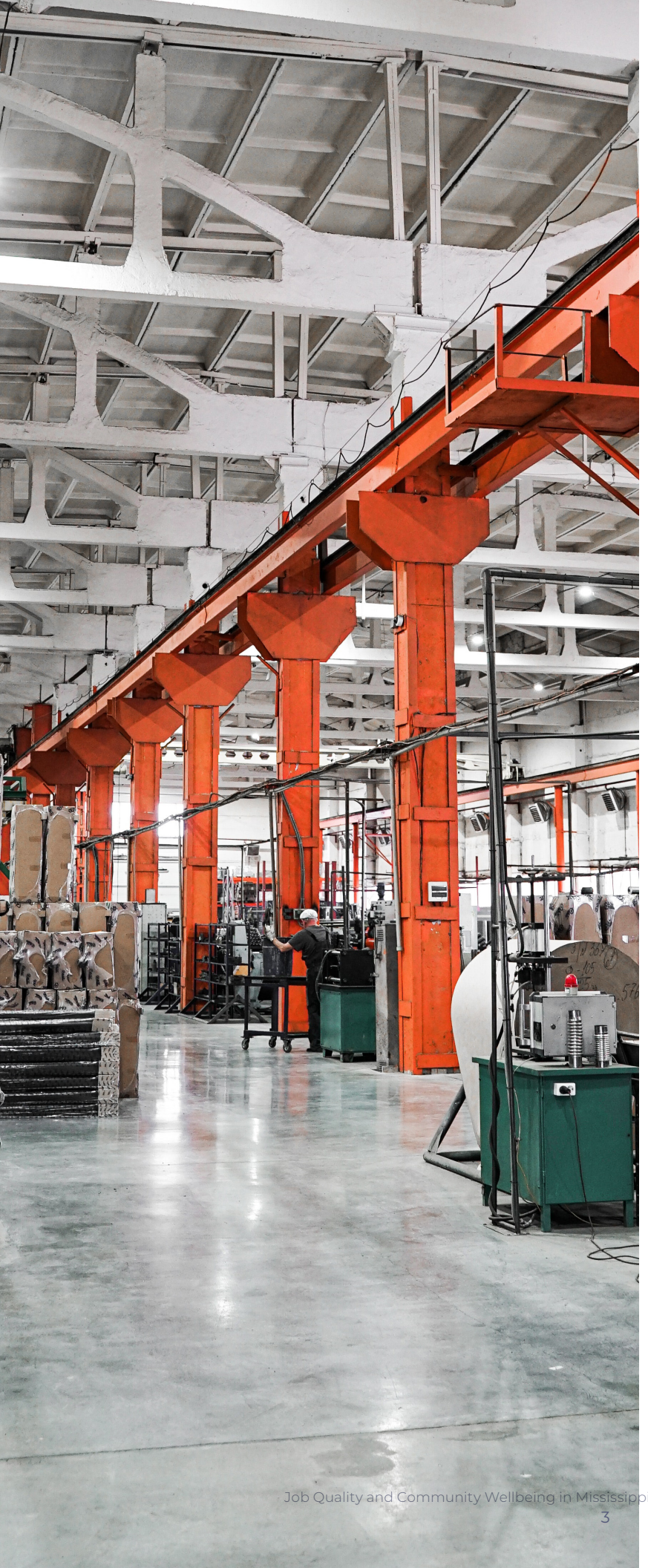
Job quality is the term used to describe the holistic experiences of workers at work. Although definitions may vary, job quality generally includes both economic and non-economic factors. Job quality is important for individual worker experiences but is also increasingly recognized as a key route to improving economic competitiveness, productivity, and innovation (Bosworth & Warhurst, 2021).

In the main body of this report (Part I), job quality in Mississippi and Alabama's manufacturing sector is assessed by analyzing data from over 1,300 employee survey responses. Taken together these provide insight into the overall quality of jobs in the region's manufacturing sector. This regional data is analyzed across six key dimensions of job quality:

- Pay and benefits
- Terms of employment
- Work life balance
- Health and safety
- Representation and voice
- Intrinsic characteristics

Results show that the quality of jobs in Mississippi and Alabama's manufacturing sector is low across many of these dimensions. The Results and Analysis section of this report presents results in detail across each of these dimensions. Key take aways include:

- Average reported pay is decent, and these jobs are often some of the best paid in the region. However, significant racial wage gaps are reported, and averages still do not meet what is considered needed to support a family.
- Although most jobs are permanent positions, very few respondents reported opportunities for upward career mobility.
- Work-life balance is virtually nonexistent for many respondents who put in long shifts with highly variable and difficulty to predict schedules.
- High rates of serious injury and reports of racially hostile and sexually harassing work environments are reported.
- Fear of retaliation from employers prevents workers from using their voice and speaking up to improve practices or report workplace issues.
- Many workers express pride in their work but this pride is tempered by stories of unfair or mistreatment by their employers.



Taken together, these survey results highlight the challenge of economic development policies that focus on firm recruitment but do not address the quality of jobs created by these firms. This is further exemplified by a review of results from a companion survey of community members who live in and around manufacturing sites. These community members report significant challenges ranging from lack of infrastructure, struggling schools, and impoverished families, all while living in the shadows of production sites that were thought to be the solution to poverty and economic insecurity.

In the supplemental part of the report (Part II), results from the worker surveys are disaggregated and presented on a firm-by-firm basis for four facilities in Mississippi and four in Alabama. Analysis at this scale allows for a deeper understanding of the challenges and opportunities faced by workers in the region's manufacturing sector.

Taken together, the regional analysis in Part I and the firm-level analysis in Part II provide a detailed exploration of the quality of jobs in the manufacturing sector and point to areas of much needed improvement regarding the support of individual workers and local economies. The results from both sections inform the discussion of possible avenues for improving job quality and increasing community benefit for investments in firm recruitment policies in the Conclusion and Recommendations.

INTRODUCTION

Manufacturing industries are the headline grabbing job creators across the American South. Taking advantage of tax breaks and other government policies and incentives, new manufacturing facilities have sprung up in Mississippi and Alabama and are touted as one of the best ways to address the region's high poverty and unemployment problems.

State and local development agencies work to recruit and retain national and international firms looking to locate their manufacturing facilities in sites that allow access to American consumer markets while also taking advantage of low-cost labor markets.

The result is thousands of jobs in the marquee facilities of Mercedes, Boeing, Nissan, and the like, but also jobs with supply chain companies that develop alongside these facilities, providing everything from raw materials to finished components. For a region that has long struggled with high rates of poverty and economic distress, it is no surprise that the growth of manufacturing jobs generates such positive headlines. The promise of employment in an industry attributed with the creation of the 20th century American middle class is hyped as a source of hope and change for many politicians and residents, and this report evaluates the strengths and weaknesses of that argument by examining dimensions of job quality in the southern states of Mississippi and Alabama.

Good jobs are necessary for a healthy local economy so that local businesses can prosper.

Job quality is a measure of how good or bad a job is. Good jobs are jobs that pay well, include health and retirement benefits, protect workers from undue risks, provide opportunities for advancement, and are open to all workers regardless of race and gender. Good jobs provide important benefits for workers and local economies. Good jobs are necessary for a healthy local economy so that local businesses can prosper.

Key indicators of job quality include: the pay and benefits package, the terms of employment, work-life balance, health and safety, representation and voice, and intrinsic characteristics of the job (Aspen Institute, 2021; Kalleberg, 2011; Warhurst et al., 2017). Good jobs are high quality jobs which provide pathways for personal and household financial stability. These jobs are empowering by giving workers a voice

and making them feel like they are an integral part of the company. This in turn boosts performance.

High quality jobs also are an essential building block for community economic development. According to the Ford Foundation, these jobs pay sustainable wages and offer career advancements, allowing workers to accumulate financial assets. Bartik and Houseman (2008) define "good" jobs as "jobs that will ensure a steady improvement in the standard of living for the middle class and that will offer a way out of poverty for low-income Americans." When workers have good jobs, their families are better off, and their kids are healthier and stay in school and graduate spend money in local businesses. This in return helps improve the local business climate and attracts more good jobs.

But not all jobs are good jobs that benefit families and communities. In the worst cases, bad jobs harm workers, are unfulfilling, intensify personal financial insecurity and hamper widespread economic growth.

Having a job is an important determinant of people's well-being. However, holding a bad or precarious job is widely recognized as a source of distress. Therefore, focusing exclusively on the number of jobs an industry generates provides only a partial perspective, since people's well-being depends crucially on the quality of the job (Cazes et al., 2015). Job quality is not only a key determinant of the well-being of individuals and of the households in which they live, but can also be an important driver of labor force participation, productivity, and economic performance. Good jobs help families pay the rent, put food on the table, provide basic access to health care, allow them to spend time with friends and family, and cushion the impact of setbacks, such as injuries and health emergencies. High-quality jobs improve employees' well-being and contribute to at-work productivity — a win-win for workers and employers.

Manufacturing remains an important cornerstone in the national economy, and it is still true that "manufacturing matters" (Mishel, 2018). For much of the 20th century,

and particularly after hard-won labor rights and protections, manufacturing work "offered opportunities for workers without college degrees to gain technical skills and climb the economic ladder" (Ramaswamy et al., 2017). As a result, manufacturing work continues to live in the American imagination as the jobs that are entry points to the middle class and help to boost entire economies. This is borne out in studies of attitudes and opinions: 90 percent of Americans believe that manufacturing work is important to the country's standard of living (Giffi et al., 2014). When asked what jobs residents would support bringing to their community, 90 percent reply manufacturing jobs (Giffi et al., 2014, p. 6).

Yet this portrait of manufacturing work is not the reality for workers in many manufacturing facilities today. Our image of the well-paid auto, auto parts, steel, or electronics worker who can afford to buy a home, provide their family with health insurance, and take an annual two-week vacation may have been true from the 1950s through the 1970s. But since then, many corporations that engage in manufacturing goods have changed their business practices in relationship with their blue-collar employees. Nationwide, manufacturing wages are below the median wage for all job categories in the private and public sectors. In particular, wages in automotive and auto parts production are declining faster than in other manufacturing sectors (Ruckelshaus & Leberstein, 2014). May 2021 National Occupational Employment and Wage Estimates from the U.S. Bureau of Labor Statistics show that the mean hourly wage for all occupations is $28.01 but $20.71 for production workers, and that the annual mean wage of all occupations is $58,260 and $43,020 for production workers.

If job quality is a spectrum, with good jobs on one end and bad jobs on the other, then American manufacturing jobs are inching toward the wrong end of that range. And indeed, a report by the Congressional Research Service argued that "the assertion that manufacturing as a whole provides better jobs than the rest of the economy is increasingly difficult to defend" (Levinson in Mishel, 2018). The result is that as job quality gets worse, the opportunities for family well-being and community prosperity are stunted.

Simply adding more jobs to a local and regional economy does not, on its own, improve family well-being and community prosperity. Elected officials and other policy makers need to examine the type of jobs being created to understand their impact on families and communities. Some local leaders believe that recruiting companies and jobs to an area is sufficient to improve living standards and create a healthy local economy. But they also need to examine the quality of the jobs created, and the employment practices of firms recruited.

This is especially true in the American South which, while part of the new geography of manufacturing work, is characterized by few worker protections, low wages, and high levels of poverty and inequality. As historian Bethany Moreton writes, the South is often a harbinger for the U.S. — "as goes the South, so goes the nation" (2020, p.

286). Throughout American history, “the problems that have beset southern labor for the past century and a half — unfree labor, low wages, lack of collective bargaining rights, and virulent and sometimes violent repression of those who have tried to organize unions - have become the problems of workers across the United States” (Hild & Merrit, 2020, p. 2).

This report presents original data on workplace experiences of manufacturing workers employed in facilities across Mississippi and Alabama. These two states are at the heart of the growing number of manufacturing facilities in the American South. As firms closed production sites in the industrial heartland of the Northeast and Midwest and moved in search of lower operating costs, many ended up at the southern end of I-65 in the heart of the South. At the same time, foreign-owned firms opened production facilities in the South to meet growing U.S. demand for everything from cars to electronics (Anderson & McKevitt, 2020; Kim, 2018; Moretti, 2013).

But the companies that moved jobs from the Northeast and Midwest to the South did so primarily because of cheaper labor, fewer environmental regulations, and anti-union laws. As a result, the quality of those blue-collar jobs was not the same. Unionized workers in an automobile or tire factory in Ohio or Michigan would likely be able to afford to buy a house, have comprehensive health coverage, access to paid time off to care for themselves or their families or take vacations, and could retire with dignity. The similar worker in an auto parts plant in Alabama and Mississippi has a very different standard of living. Our study investigates what that means for the workers, their families, and the local economies in these two states — and recommends what local and state officials can do to make the growing number of blue-collar manufacturing jobs more beneficial to families and communities. As demonstrated in the various case studies that are portrayed in Part II of this report, key indicators of job quality all point to the low-quality jobs held by many Southern manufacturing workers.

There is hope for a more inclusive and prosperous manufacturing sector in the American South and the country as a whole.

Although challenges abound, there is hope for a more inclusive and prosperous manufacturing sector in the American South and the country as a whole. This project saw challenges that workers face every day, including modest wages for skilled work, schedules that make balancing the needs of home and work challenging if not impossible, workplace practices that often leave workers at risk, and unequal treatment for workers of color and women workers. During the 20th century,

Presenting data on a firm-by-firm basis provides for a deeper understanding of the opportunities and challenges facing workers and allows for comparison across firms. While the survey results presented here may or may not be representative of manufacturing working conditions across the entirety of the southern United States, the voices of more than 1,300 survey respondents provide a glimpse into the experiences of Mississippi and Alabama workers in the manufacturing sector. The authors hope that taken together, the regional analysis and case studies provide residents, workers, community leaders, and policy makers with the data to create and continue discussions around the best path forward toward shared economic prosperity for our manufacturing workers and communities.

high quality manufacturing jobs uplifted workers, families, and entire communities. If residents and public officials intentionally support policies that upgrade job quality and overall community economic development and prosperity, this can happen in the 21st century as well.

This report is presented in two parts. Part I contains the main content of the report, beginning with an overview of the context of manufacturing's move to the South and introducing the concept and measures of job quality. Part I continues with an overview of the research approach and methods employed. The report introduces and analyzes survey respondents from across Mississippi and Alabama and assesses the quality of manufacturing jobs in the region. These results are presented using the analytic framework of job quality, meaning that general survey responses and findings are compared to and interpreted using the multiple dimensions of job quality.

The results in this section of the report are presented as a region-wide analysis. The report also presents results from a companion survey of community members who live in and around sites of manufacturing production. Taken together, these help to show how the rise of manufacturing employment impacts not only those directly employed by firms but those living in the shadows of production sites.

Part I concludes with a brief exploration of potential pathways for future research, community engagement, and policy recommendations to improve job quality in the region's manufacturing sector.

Part II of this report changes the scale of analysis and presents survey results at the firm level, examining eight specific case sites to understand the dynamics of job quality and workplace experiences. Of the eight case sites, four are in Mississippi (Continental Tire in Clinton, Cooper Tire in Tupelo, GE Aviation in Batesville, and Yokohama Tire in West Point), and four are in Alabama (Mercedes in Vance, North American Lighting in Muscle Shoals, New Flyer Industries in Anniston, and SMP in Cottonwood).

PART 1: REGIONAL ANALYSIS

SOUTHERN MANUFACTURING

The manufacturing sector remains an important component of most advanced economies with a large footprint in the United States economy. Close to 12 million workers are employed in the manufacturing sector, making it the fifth largest sector in the entire economy. The average manufacturing employee earns $60,260 a year, although there is a wide variation in wage levels in different industries and different regions of the country. In 2020, the value added by the manufacturing industry to the United States' GDP was $2.27 trillion (Statista, 2022). Manufacturing employs a higher share of workers without a college degree than the economy overall. On average, non-college-educated workers in manufacturing made 10.9 percent more than similar workers in the rest of the economy in 2012–2013 (Scott, 2015).

In particular, manufacturing has a large presence in the South. In 2020, 16 percent of the workers in Mississippi and Alabama were employed in Manufacturing (NAICS 31-33) which is significantly higher than the 10 percent national average (*Quarterly Census of Employment and Wages*, 2020).[1]

NEW GEOGRAPHY OF MANUFACTURING

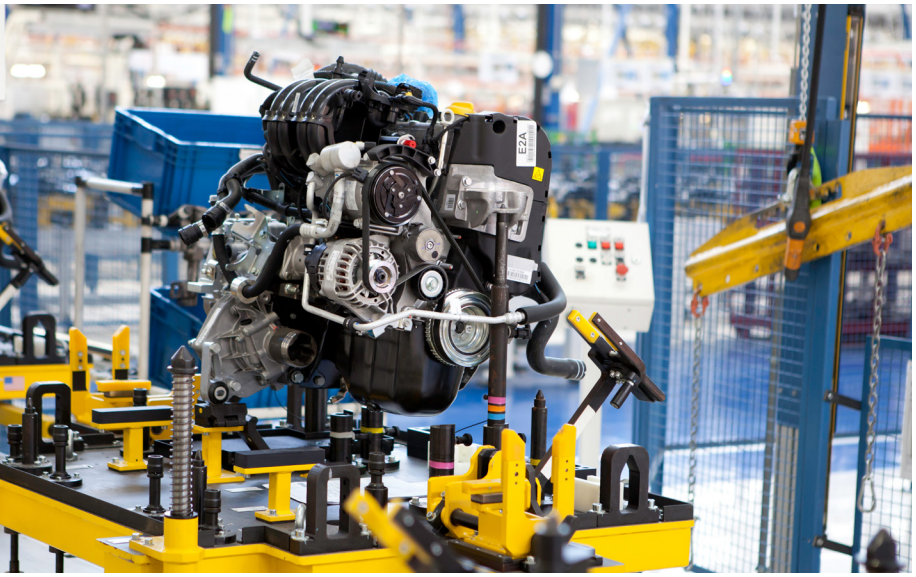
The relocation of manufacturing facilities to the American South is not due to any single causal factor. Instead, a confluence of factors pushed industry away from more traditional northern manufacturing hubs and pulled firms into the American South. Together, these forces (e.g., generous subsidies and incentive packages, the low-cost of labor, a political climate hostile to unions and workers' rights, the increasing mobility of capital, and executives seeking to maximize profits while minimizing labor costs), have created a new geography of manufacturing work (Kim, 2018; Moretti, 2013; Rubenstein, 1992; Storper & Scott, 1990).

Push factors include those that led industry and firms to look outside of the traditional industrial heartlands in the Midwest and Northeast. For much of the 20th century, the major manufacturing facilities located in the South were textile mills, food processing plants, and steel mills. But starting in the 1980s, local business groups and elected officials began to recruit different kinds of manufacturing facilities that had previously been located in the Midwest and Northeast, such as auto, auto-parts, and medical device factories.[2] The outcome was a shifting location of automotive and affiliated manufacturing functions. "In the intensely competitive North American automotive

[1] In 2020, Mississippi and Alabama's location quotients for manufacturing sector employment were 1.47 and 1.56, respectively (ibid). While traditional manufacturing states of the Northeast and Midwest have higher quotients (e.g., Indiana with 1.99 and Michigan with 1.61), Alabama is the 5th highest quotient among all states and Mississippi is 8th.

[2] It was largely through investments in transportation related production (airplanes, automobiles, parts, tires, and trains) thatAlabama rose to the top of states receiving foreign direct investment (Institute for Business Value, 2019).

market, geography mattered again, as it once had for Henry Ford: finding the optimal plant location with an immense market area of nearly 20 million [square kilometers] became critical corporate objectives... Japanese and American companies reached the same conclusion: the geography of motor vehicle production which had dominated the industry since before World War I had to be scrapped" (Rubenstein, 1992, p. 2).



Auto company executives felt that they would make bigger profits and have greater control over the workforce if they located factories to rural areas with high unemployment rates, more desperate workers, and without a history of unionization. As one study explained, "a shift in the location of employment provides the management of a firm with a lever to manipulate the labor force and reduce the strength of unions" (Peet 1984 in Rubenstein, 1992, p. 18). When firms relocate to small towns, they can exert greater influence over local labor markets.

The ability to exert control over local labor markets is a pull factor, attracting production facilities into the U.S. South, although notably, headquarters and higher-paying managerial positions often remain elsewhere (Storper & Scott, 1990). Other attractions for opening new facilities or relocating existing facilities to the U.S. South include lower labor costs, anti-union political and cultural environments[3], and generous incentives given to firms by public agencies.

Another major force pulling firms into the U.S. South are the generous incentive packages used by state and local governments. These packages are designed to entice large manufacturing firms because many local elected officials and business lobby groups view manufacturing industry as a cornerstone of economic development (Cobb, 1993). Manufacturing was considered a primary stage of economic growth in what was considered to be one of the poorer regions of the U.S. As discussed below, the use of public tax dollars to incentivize firms to a specific location is deeply popular and has the potential to serve as a spark for regional economic growth, but also comes with risks and large price tags.

[3] The Taft-Hartley Act allowed states to pass anti-union "right to work laws" making it more difficult for workers to form a union. As a result, many Southern states – including Mississippi and Alabama passed these laws, which made it very difficult for workers to unionize. The National Employment Law Project describes right to work laws as "crippling the ability of unions to stand up for workers by pitting workers against each other. By law, unions must represent every worker in a unit equally. But in right-to-work states, where unions are forbidden from requiring equal dues from their members, some workers reap the benefits unions deliver without sharing the costs, instead passing the buck to coworkers to foot the bill for all the union dues."

INCENTIVIZING JOB GROWTH

Public incentives to private corporations are a significant attraction and have enticed firms to locate in Mississippi and Alabama. Large-scale public investment in private industry is an established economic development practice designed to attract firms and spur future investment. When done well, incentives act as a "big push" that will start a virtuous cycle of investment resulting in agglomeration effects. Agglomeration is the term economists use to describe an emergence of hubs within a particular industry (Moretti, 2013).

> [T]his approach to economic development is based on the intuitive notion that public monies can jump-start a local economy trapped in poverty. But critics on both the right and the left have lambasted such initiatives, either as big government overreach or top-down control of local communities... the real test is not whether they create jobs during the push. The fact that an inflow of money temporarily increases economic activity in an area is hardly a sign that the money was well spent. Instead we need to look at whether the publicly financed seed can eventually generate a privately supported cluster that is large enough to become self-sustaining. The idea is that the government-provided investment carries the economy past the tipping point but not any further. At that point the focus of agglomeration take over, continuing to attract businesses and workers well after the subsidies end (Moretti, 2013, p. 200).

Incentive packages are often customized to meet the needs of individual businesses and aim at "affecting business decisions" particularly firm location (Bartik & Eberts, 2012, p. 635). Incentive packages may include a variety of tax and non-tax benefits.

TABLE 1

Tax and Non-Tax Incentives

Sample Tax Incentives	Sample Non-Tax Incentives
Property tax abatement	Workforce training
Tax credits	Advice and consultation
Tax increment financing	Applied research grants/investments
Reduced sales tax on business inputs	Location advice and information
Discretionary tax credits for business investment/employment creation	Infrastructure improvements
Enterprise zone incentives	

Source: Bartik & Eberts 2012

Mississippi and Alabama have aggressively used incentives to attract business to their states — giving billions of dollars to private corporations. While each of the firms included in this study have received public investment through tax subsidies and incentives, these are only a fraction of the overall state expenditures in this area. Since the mid-1990s, it is estimated that Mississippi invested $4.8 billion and Alabama has invested $4.5 billion in corporate subsidies (Good Jobs First, 2020b; Moretti, 2013).[4]

However, the evidence of the effectiveness of incentives on firm location decisions and on local economic tradeoffs is mixed at best and ineffective at worst (Bartik & Eberts, 2012; Donegan & Lester, 2018; Peters & Fisher, 2004; Rubenstein, 1992). Perhaps the central challenge is determining which firms and industries to invest in — requiring public agencies to operate like "venture capitalists'' — and determining the correct amount of incentive. Moretti explains the challenges of determining the appropriate scale of public investment:

The provision of the subsidy should be commensurate with the magnitude of the social benefit. But when dozens of similar counties are desperate to attract investment from outside, their bids often become so generous that they can exceed the social benefits to the community. Mayors and governors have an incentive to bring the new company to town, no matter what the cost. When they are successful, front-page stories in local newspapers tend to focus on the hundreds of future local jobs, not on the fine print of the financial packages offered. When they are unsuccessful, local politicians are lambasted for not doing enough for the local economy. All of this can lead local governments to overbuild. In such a case, the only winners are the owners of the company being courted, since state and local governments end up stuck with the bill. And even when these subsidies make economic sense for a particular county, they do not always make sense for the country as a whole, as competition among municipalities for a given company can turn out to be a zero-sum game for the nation (Moretti, 2013, pp. 209-210).

Place-based economic development strategies, such as the use of public subsidies and incentives to bring new jobs to a region, are further limited by the inefficient targeting of social benefits to residents in need. When the Tennessee Valley Authority pumped millions of dollars into the regional economy in the 1930s, firms opened and jobs were created, but overall poverty rates did not change. This happened in part because as jobs were created, more people migrated into the region, lessening the intended effect of creating jobs for those already living in the Tennessee Valley. So, while the investments may have helped the regional economy, it had less impact on the individual living standards of long-term residents.

In Mississippi and Alabama, the true costs and benefits of incentives and corporate subsidies are hard to measure. Rather than transparent disclosures of public

[4] For comparison, Mississippi and Alabama's 2021 fiscal year state budgets are $6.3 billion and $10.1 billion, respectively (Urban Institute, 2022).

expenditures on incentives, the two states' use of incentives, their oversight, and clawback provisions are opaque. A 2022 report from Good Jobs First ranked U.S. States by the transparency of their economic development and incentives programs. Of all 50 states plus the District of Columbia, Alabama and Georgia placed last for transparency, and Mississippi ranked 40th. Although Mississippi provides some disclosure of grant recipients, "tax-based subsidies have no disclosure at all" (Tarczynska et al., 2022, p. 51). For Alabama, the report summarized the state of subsidy tracking and transparency in rather scathing terms: "Despite expensive subsidy packages to companies, Alabama does not have any recipient-level subsidy disclosure, either for grants or tax-based subsidies. It is safe to say that Alabama is one of the "darkest" states in the country" (Tarczynska et al., 2022, p. 49). In fact, Alabama has gotten worse over time. It no longer reports disclosure information on recipients of its state funded training programs.

Given the scale of investments being made on the public's behalf, the lack of reporting, disclosure, and accountability is troubling. In Alabama, the state and local development agencies offer such a wide array of subsidies that they effectively "reduce or eliminate almost every major corporate tax" (Good Jobs First, N.D.). Such large tax breaks for corporations place the burden on everyday taxpayers — impacting lower- and middle-income Alabamians the most. This shifting tax burden is placed on the very workers whose jobs the state pays to create. In Mississippi, economic development policies allow corporations to take advantage of individual tax returns as companies are allowed to "charge their employees 'job development assessment fees' (wage reductions which workers can then claim as credits on their personal income tax returns)" (Good Jobs First, N.D.).

Large tax breaks for corporations place the burden on everyday taxpayers — impacting lower- and middle-income Alabamians the most.

Behind every dollar spent by the state is the working class and middle-class taxpayer shouldering the cost. While billions have been spent recruiting and retaining corporations, other key needs have gone unmet. Former Alabama lawmaker Patricia Todd wrote a report calling for increased transparency and accountability in Alabama's incentives programs:

> "rather than prioritizing and funding the services and infrastructure that our residents need to thrive, most of our elected leaders are giving billions

> of dollars in economic development tax incentives to highly profitable global corporations like Mercedes, Toyota and ThyssenKrupp, with few, if any, enforceable requirements that those companies even create jobs – and its taxpayers – is the real cost of that dollar and the opportunity cost of essential programs and services that go underfunded" (Todd, 2020).

It is this intersection of paying corporations to create jobs (or move existing jobs into a jurisdiction) and the underfunding of essential social needs that the present report examines by exploring both worker and resident perspectives on the state of the manufacturing industry in the South.

INDUSTRIAL PLANTS ATOP CENTURIES OF INEQUALITY

State spending on publicly funded incentives to recruit and retain large manufacturing firms does not occur in a vacuum. These investments are taking place atop steep socioeconomic challenges ranging from economic insecurity, poor child well-being, crumbling infrastructure, and continued legacies of racial inequality.

Mississippi and Alabama have long lagged behind the rest of the nation in terms of economic development and progress for children, individuals, households, and regions. Poverty, low wages, and structural issues cement many residents into economic insecurity within these local labor markets; poverty rates are indeed higher in Mississippi and Alabama than they are in the nation as a whole. While approximately 13.4 percent of the U.S. population is determined to be living below the poverty level, in Mississippi 20.3 percent of the population is below poverty and in Alabama the rate is 16.7 percent. (U.S. Census Bureau, 2020).

Across all industries, median earnings for full-time workers in Mississippi are $39,178 and in Alabama it is $42,852 (U.S. Census Bureau, 2020). Neither state has a minimum wage and therefore relies on the Federal level which is set at $7.25 an hour. (Annualized at 40 hours a week for 52 weeks, workers at the minimum would earn $15,080 per year).

In a 2018 report from Oxfam, Mississippi and Alabama ranked 50th and 49th respectively, on its "best states to work in the United States." (Rose et al., 2018). Relying on a methodology that explored the wages, worker protections, and right to organize, Oxfam found that the South in general, and these two states in particular, are home to the lowest labor market floors in the nation. Furthermore, the report found a correlation between higher job quality, higher labor market floors, and more desirable social and economic indicators for the states. In other words, the best states to work in also had better socioeconomic indicators for all residents.

However, this is not the case in Mississippi and Alabama, the two-state region is home to low prevailing wages, high rates of poverty, and faces some of the steepest socio-economic challenges in the nation. This provides potential employers with a lower

cost labor force without locating offshore and taking advantage of access to markets and development programs.

It is not just workers and households that are struggling in Mississippi and Alabama. The two states regularly rank in the lowest quartile, and often last, in rankings of child well-being. In 2022 Mississippi ranked 48th and Alabama ranked 46th in the nation for overall child well-being (The Annie E Casey Foundation, 2022). As seen in the table below, children in the states of Mississippi and Alabama face steep challenges ranging from economic well-being, education access and attainment, health and health care access, and stable family and household units.

TABLE 2

Community well-being in Mississippi and Alabama

Indicator	Mississippi's Ranking among 50 States	Alabama's Ranking among 50 States
Overall well-being	48th	46th
Economic well-being Children in poverty, parents lacking secure employment, high housing cost burdens, etc.	49th	40th
Education Children not in preschool, reading and math proficiency, high school graduation rates	39th	42nd
Health Birth weight, children without health insurance, childhood mortality rates	50th	47th
Family and Community Single-parent families, parental education levels, high poverty neighborhoods, teen birth rates	50th	45th

Source: The Annie E Casey Foundation, 2022

State infrastructures are also in need of investment in Mississippi and Alabama. In their annual ratings of infrastructure, the American Society of Civil Engineers gave Mississippi a D+ and Alabama earned a C- (American Society of Civil Engineers, 2021). These grades consider the water, energy, transportation, and road infrastructures of each state. Other metrics place Mississippi at 48th in the nation and Alabama at 28th when considering only energy, transportation and internet infrastructure (US News & World Report, 2021).

Beyond these rankings are the lived realities of communities with poor or crumbling infrastructure. Jackson Mississippi's water crisis in Summer 2022 left 250,000 people without water for days on end and was then put on a boil water alert (Pender, 2022). In Alabama, communities underserved by the wastewater treatment facilities have been

grappling with septic tank backups and the myriad health concerns that accompany frequent exposure to feces (Uteuova, 2021). In both cases of failing infrastructure, racially disparate experiences have brought to light concerns, and investigations, into possibly discriminatory practices at play.

Race-based inequality and the continuing legacies of racial discrimination are core challenges facing the region. Racial wealth gaps, racially unequal access to health, education, and employment are all challenges to well-being in Mississippi and Alabama. In his analysis of historical and modern regional development in the Mississippi River Delta, geographer Clyde Woods examines the "continuity of plantation-based economic systems and power relations" which result in "extreme ethnic and class polarization" (2017, pp. 4, 6). Similar to Michelle Alexander's (2012) examination of the continued evolution and adaptation of Jim Crow, Woods explores how plantation power relations remain in effect today through a process of adaptation and control.

Woods uses the framework of plantation blocs, the racially unequal and discriminatory practices that work to maintain class and race polarization, to explore industrial development in the region. In earlier eras of industrial growth in the region, "firms offering improved wages, working conditions, and training were discouraged in favor of low-wage, low-skill, and non-union enterprises. Firms offering more than this were (and still are) considered threats to the painstakingly crafted regional system of social control" (Woods et al., 2016, p. 204). Importantly, this brings to the fore the reality that manufacturing work, or jobs in general, will not on their own address racial or class inequality; "plantation relations can be reproduced under a variety of conditions so long as there is no systematic challenge to the dominant bloc" (ibid). As a result, racial wealth gaps, unequal access to health care and education, and disparate employment outcomes persist.

INCENTIVES IN CONTEXT

From a policy leader perspective, the use of tax and non-tax incentives to recruit and retain manufacturing facilities are expected to improve many of the above socioeconomic challenges. The basic principle is that "in return for hefty public investment…[firms] are expected to improve the lives of the region's most downtrodden inhabitants" (Anderson & McKevitt, 2020, p. 266). However, many of these indicators have not meaningfully shifted in the three decades since this the start of the current wave of industrial firm recruitment, and the region remains home to high rates of poverty, failing infrastructure, and struggling children. Instead, some observers argue that "for global manufacturers, the United States — more precisely the American South — has become the low-wage alternative to China" (H. Meyerson in Anderson & McKevitt, 2020, p. 267).

Together, the public investment in corporate subsidies, the low labor costs, and business friendly political environment have made Mississippi and Alabama attractive destinations for firms looking to relocate or open branch production facilities. However, these traits also lower the labor market floor and suppress job quality, both of which limit the ability of new jobs to uplift household and local economies.

Rather than rely on aggregate economic data, this report adds a unique firsthand account from workers about the quality of the jobs in manufacturing facilities supported by public subsidies and a firsthand account from residents of the economic impact of those investments on their communities. The purpose of the report is to provide detailed understanding of the type of jobs that have been created through these policies and to help explain why the aggregate statistics like percentage of the working population in poverty, lower incomes, and continued racial disparities, have not gotten better through deliberate policy choices of subsidizing manufacturing growth.

MORE THAN JUST PAY: JOB QUALITY

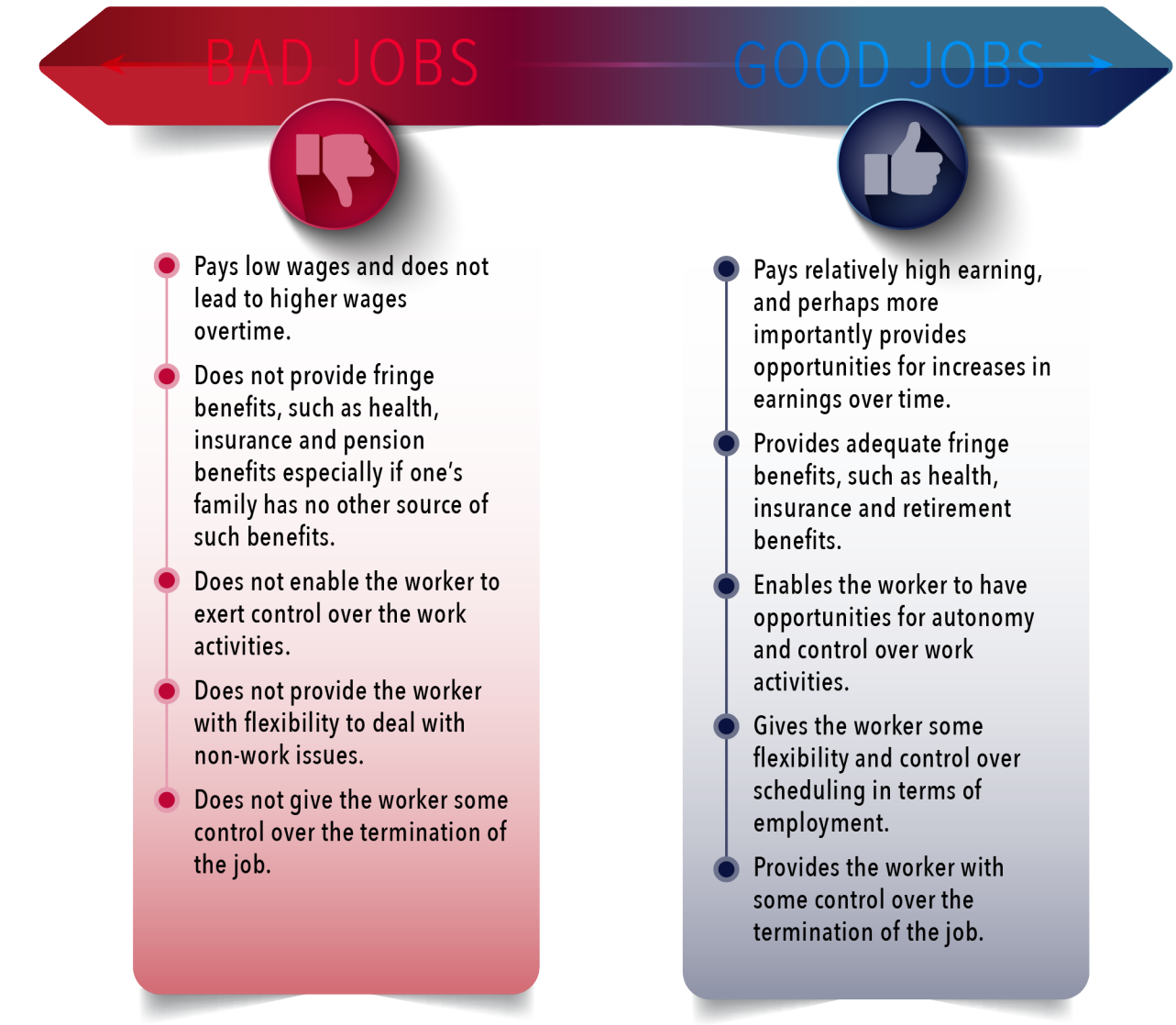
This report uses the framework of job quality to understand and evaluate workplace experiences inside manufacturing facilities in Mississippi and Alabama. More than just pay, job quality is about the holistic experience of workers at work. Job quality addresses issues such as pay and benefits, terms of employment, health and safety at the workplace, opportunities for work life balance, and representation and voice in the workplace.

The job quality framework allows us to consider the holistic role of work in our lives because jobs are more than sources of a paycheck. Jobs are avenues through which Americans access basic needs; jobs also support social and psychological well-being of people and their communities (Kalleberg, 2011; Warhurst et al., 2017). With a good job, workers can build a high quality of life with expectations of satisfaction and stability. The diversity of definitions for job quality reflects the breadth of disciplines utilizing this framework. It is a multidimensional concept with economic and non-economic criteria operationalized differently by different fields. Economists frequently equate job quality with economic compensation — particularly wages — and structure the debate about "good jobs versus bad jobs" in terms of earnings (e.g., Acemoglu, 2001). Psychologists and sociologists on the other hand, often focus on well-being, the quality of working life, and meaning derived from work (Grote & Guest, 2017; Guest, 2022).

In a 2017 report, Warhurst, Wright, and Lyonette (2017) summarized these multiple dimensions into the following broad categories: pay and other rewards, intrinsic characteristics, terms of employment, health and safety, work-life balance, and representation and voice. Good jobs pay well, provide opportunities for advancement and fringe benefits, have job security, flexibility, and predictability. Jobs without those characteristics are considered bad jobs (Kalleberg, 2011). Bad jobs are often

FIGURE 1

The Spectrum of Good Jobs and Bad Jobs



Source: Kalleberg, 2011, pp. 9-10

"dead ends" with little opportunity for advancement, few protections, low and stagnant wages, and precarious employment terms. Figure 1 recreates Kalleberg's summary of the traits that most commonly describe good jobs and bad jobs. Like the multidimensional job quality, the spectrum of good jobs and bad jobs underscores the breadth of work-related experiences that are included in considering the quality of jobs.

The quality of jobs and the presence of good jobs is important for individuals and communities as good jobs provide both economic and noneconomic benefits to a worker and their community. Bad jobs leave workers in economic precarity and provide few benefits to the broader community. With a good job, one can build a high-quality life with expectations of economic stability and personal satisfaction. Creating good jobs, and upgrading bad jobs, is an essential element of community

economic development because when jobs are good, “a myriad of social and economic problems — such as economic development, family formation and social integration, poverty and inequality, and individual well-being are all improved” (Howell & Kalleberg, 2019, p. 1).

Alternatively, when jobs are bad, communities may suffer as “taxpayers get stuck with even higher, hidden costs — in the form of Food Stamps, Medicaid, Earned Income Tax Credit, and housing assistance” (LeRoy, 2007, p. 190). Decline in the quality of job, such as the quality of employment terms, workplace conditions, and treatment, also has significant effects on worker productivity. A 2017 OECD evidence review found that:

> “Strong evidence is found for a negative relationship between job stress or job strain and individual at-work productivity and for a positive relationship between job rewards and productivity. Moderate evidence is found for a negative relationship between work-family conflict and at-work productivity and for a positive relationship between fairness at work and social support from co-workers and productivity. Health influences the relationship between the quality of the work environment and productivity” (Arends et al., 2017).

While many of the manufacturing jobs discussed in this report are some of the better paying in the region, it does not automatically mean that the jobs are good, nor that employers are taking the high road when it comes to employment practices. When employers receive subsidies from the public there is an added need to consider the quality of the jobs created and the community’s overall return on their investment. In short, when it comes to jobs, employers, workers, and the public deserve a fair shake.

DECLINE IN JOB QUALITY

Low job quality is not just endemic to the American South. Across many sectors of the American employment landscape job quality is declining. Evasion and violation of employment laws coupled with erosion and abandonment of workplace standards has degraded job quality and created what some have termed a “gloves-off economy” (Bernhardt et al., 2008, p. 6). Employers may evade laws, skirt regulations (e.g., incorrectly classifying employees as independent contractors), or outright violate laws (such as ignoring minimum wages, not allowing for meal and rest breaks, etc.). American workplace standards have also declined as it is no longer common for an employee to be guaranteed basic benefits such as retirement benefits; in addition, risk is often shifted from employer to employee (e.g., by replacing defined benefits with defined contribution retirement plans). Taken together, these evasions and violations of the law and changes to cultural norms surrounding work have put downward pressure on job quality.

In the 1970's, business organizations moved from vertical integration to a reliance on subcontracting, outsourcing, and creating long and complex supply chains (Bernhardt et al., 2008, p. 16). Globalization, technological change, and capital mobility deepened this process. Meanwhile, trends in other areas have limited the possibilities to counter this trend of worsening job quality: U.S. government regulations have been rolled back, enforcement has been cut, and union density and power (significant sources of worker protection) have been reduced. As these macro-level changes transformed the structure of the U.S. economy, job quality has undergone a polarization with an increasing number of jobs on the bad end of the spectrum, and relatively few at the good end (Kalleberg, 2011).

However, despite these economy-wide trends shaping job quality, the decline in job quality and the rise of bad jobs is not inevitable. Nor are workers and communities powerless to challenge this trend. Examinations of job quality across different firms and in different countries point to areas "where bad jobs are better" (Tilly & Carré, 2017). Jobs in the retail sector are frequently found to be bad jobs, with low pay, few opportunities for advancement, limited flexibility or support for work life balance, and precarious contracts and employment conditions.

Tilly and Carré compare the retail sector across different national contexts to identify under what conditions job quality is improved in this specific sector. They find that bad jobs are not inevitable and instead they point to specific ways that institutions regulating and setting standards for job quality can be modified. Indeed, it is these very factors that explain the decline in job quality and the rise of bad jobs that point to the levers to improve job quality and increase the number of good jobs, namely, encouraging high road business strategies that function as "shifts in the institutional incentive structure and global regulatory approaches" (Carré et al., 2012, p. 14). The conclusion of this report highlights some possible avenues for improving job quality among manufacturing facilities in the American South.

EVALUATING JOB QUALITY IN SOUTHERN MANUFACTURING PLANTS

This report uses the lens of job quality to understand manufacturing jobs in the American South. This is accomplished by analyzing survey results against the six dimensions of job quality summarized by Warhurst, Wright, and Lyonette (2017). The table below includes the six dimensions of job quality (Warhurst et al., 2017), and the measures this project used to assess each dimension. For each of the six dimensions of job quality, this report operationalized these dimensions by considering the data collected and the state of the academic literature. Taken together, the six dimensions and the operationalized measures provide a framework to evaluate job quality in the American South (Table 3).

TABLE 3

Operationalizing Job Quality

Dimension Adapted from Warhurst, Wright and Lyonette (2017)	**Operationalized Measure of Dimension for the Southern Manufacturing Worker Project**
Pay and Benefits	• Jobs pay a livable wage that would support local families • Jobs offer health insurance that is affordable and accessible
Terms of Employment	• Jobs are direct hires as employee of the firm • Internal labor markets exist (opportunities for advancement)
Work Life Balance	• Workers are scheduled to work a reasonable number of hours • Schedules are predictable and flexible
Health and Safety	• Safe production practices with few injuries • Workplaces are free from racial discrimination and sexual harassment (psychological health)
Representation and Voice	Workers can file complaints without fear
Intrinsic Characteristics	Workers report that they have pride in their work

This report presents survey data from manufacturing workers along each of the above dimensions to tell the story of job quality in southern manufacturing facilities. It does not operationalize these dimensions by creating precise measures and weights but instead indicates if each measure is met. The results portion of the report indicates which measures were met by manufacturing jobs and the conclusions provide a holistic assessment of job quality across all dimensions.

Pay and Benefits Pay and benefits are the most well-known dimension of job quality. For this report, a job that pays a livable wage that would support a family of three in Mississippi and Alabama is considered as having met this dimension. This report uses the standard wage of $26.46 per hour which is determined to be a livable wage in 2019 to support a family of three in Mississippi and Alabama, using the MIT Living Wage Calculator (Glasmeier, 2020).

Another measure of pay and benefits is the presence or absence of employer-provided health insurance. The survey asks workers if their employer provides health insurance or not.

Terms of Employment The second dimension of job quality are the terms of employment which represent the security and stability of work as well as internal opportunities for advancement. To measure this dimension of job quality, this report evaluates the number of respondents who are employees of their company

compared to those who are temporary or contract workers. The second measure for this dimension is a self-assessment of worker'' opportunities for advancement at their particular place of employment.

Health and Safety The third dimension of job quality is the health and safety of workers and their workplaces. There are two important components here: physical and psychological health and safety. According to the CDC, the national nonfatal injury and illness rate in the manufacturing sector is less than ten percent (The National Institute for Occupational Safety and Health, 2019). This report uses ten percent as its threshold point so that workers who report injury rates at or below ten percent are considered high quality. Psychological health and safety include individual treatment, experiences of harassment, and racial discrimination. This report measures job quality based on worker assessments of overall workplace climate and specific experiences of racial discrimination or sexual harassment.

Work Life Balance Work life balance is the fourth dimension of job quality considered in this report. A worker's ability to balance the demands of employment and work with their lived experiences and demands of family and community are captured in this dimension. The first measure of this dimension is the overall number of hours worked. Long working hours in a day or week (e.g., working ten or more hours in a day; 50 or more hours in a week) is known to lead to a number of health issues including increased risk of injury at work, exhaustion, and sleep disorders (Wong et al. 2019). Therefore, to meet this measure, the average reported working hours should be less than 50 per week.

The second measure of work life balance is about scheduling of work hours. Workers need both predictability and flexibility. Predictability allows workers to plan, prepare for childcare, and balance personal, familial, and community needs. Flexibility allows workers to respond to unforeseen issues that may arise, like a sick child. In this report firms offering workers predictable schedules (schedules that are generally the same week from week) and that when a schedule does change, they are given sufficient notice of more than one day would have met this dimension.

Representation and Voice The fifth dimension of job quality is representation and voice. While none of the work sites selected for case studies are represented by a union, there are other ways in which a worker may have voice and feel represented in the decision-making process. One of the most fundamental forms of voice is speaking up when problems arise. This report uses a measure of workers filing complaints and reporting safety issues as a measure of voice. When workers do not report issues out of fear of retaliation, that is a loss of voice.

Intrinsic Characteristics The sixth and final dimension of job quality addressed in this report is the intrinsic characteristics of work. While this may include areas like application of skills, variety of tasks, and other characteristics, in this report we focus on the meaning workers may derive from work. To measure this dimension, we use workers' reported pride, or lack thereof, in working for their employer.

The results section of this report provides an analysis of job quality among southern manufacturing workers from the two-state region of Mississippi and Alabama. Firm level analysis of job quality is available in Part II for selected case firms.

METHOD

To understand workplace experiences and community impacts of manufacturing facilities operating in Mississippi and Alabama, this report presents survey responses from 1,339 workers and 191 residents of manufacturing communities between 2019 and 2021. Seed funding for this project was awarded by Jobs to Move America, a Los Angeles based nonprofit organization with offices in Birmingham. This seed funding allowed for successful applications to the W.K. Kellogg Foundation for full funding of a multi-year research project designed to assess the impact of industrial manufacturing development on individuals and communities. From that work we can present this report, which uses the framework of job quality to assess workplace experiences while contextualizing those findings within a review of community identified needs and opportunities.

SURVEY DEVELOPMENT

The research team at Alabama A&M University, led by Principal Investigator Dr. Emily Erickson, developed a two-survey methodology. One survey queried current workers in manufacturing sites on their experiences in selected firms. Another survey examined the opinions of residents of communities adjacent to these manufacturing sites to assess local environmental, economic, and social impact of plant production. While some survey questions are original creations, others are adapted from existing survey projects.[5] Copies of the survey instruments (worker survey and community survey) used in this project are available in the appendix.

The survey instruments and methodologies were reviewed and approved by the Alabama A&M Institutional Review Board (IRB) to ensure research subjects are protected. The instruments were pretested by members of their research team, staff at funding agencies, and key community contacts during Summer 2019. Survey instruments were input into the Qualtrics research platform. Qualtrics provided a high level of data security, functionality, and flexibility, allowing the use of dynamic surveys while ensuring accessibility. A website managed by the research team provided direct links to the worker and community surveys and provided basic information about the project including informed consent, FAQs, and contact information for the research team.

[5] The Southern Manufacturing Worker Survey includes questions previously used in the following survey projects (either verbatim or slightly adapted): Disneyland Resort Worker Survey (Drier & Flaming 2017); Multi-City Study of Urban Inequality (Bobo, et al 1992-1994); Current Population Survey 2016 Annual Social and Economic (ASEC) Supplement; General Social Survey 2018 (GSS NORC); Pew Research Center: American Trends Wave 28 August & Wave 29 September Final Topline (2017); Milwaukee Area Renters Study Milwaukee Area Renters Study (MARS) (2016); Neighborhood Concern Index (Workgroup on Health Promotion) (1994). For a copy of the Southern Manufacturing Worker Survey or the Community Survey, contact the authors.

SITE SELECTION

This report presents data and findings at both the regional and firm scale. In doing so, the report speaks to general trends experienced by manufacturing workers in Mississippi and Alabama and identifies specific issues, trends, and opportunities within particular firms. Regional findings are based upon all surveys from workers at any manufacturing facility in either Mississippi or Alabama. The firm specific case studies zoom in and look at responses at individual facilities. Regional findings are presented in Part I, the main body of this report, while firm-specific case reports are found in Part II.

The eight research sites in Part II of this report were selected based on criteria that considered factors ranging from industry to ownership structure and marketplace. To recruit workers from both Mississippi and Alabama firms, the research team at Alabama A&M University established some criteria for case selection.

a. Involved in heavy manufacturing
b. Largely export-based industry
c. Foreign owned or owned outside region
d. Recipient of public incentives
e. Presence of community partners to support data collection efforts
f. Feasibility of survey recruitment

The team identified approximately 15 sites that met those standards in Mississippi and Alabama. Of these 15 sites, 10 were prioritized based upon points E and F. Survey recruitment strategies were deployed in each of the selected ten sites. Although similar recruitment strategies were utilized at each site, survey completion rates varied widely. At the end of data collection in September 2021, the research team compared the total number of respondents to the worker survey from our case manufacturing firms, ranked these sites based on number of respondents and percentage that completed the survey (assessed at having made it to the final quarter of the survey instrument). We then selected the top four firms in each state for inclusion in this report. For the selected firms that had sister companies or sites, we included those in the analysis. Specifically, we included Carfair in Anniston, which is a subsidiary of New Flyer of American in Anniston, Alabama. The result is eight cases with four in each state. Findings from these eight case sites are found in Part II of this report.

For the community survey, similar recruitment methods were utilized relying on Facebook ads and word-of-mouth recruitment strategies. In the end we gathered 191 community surveys — 92 from Mississippi and 99 from Alabama.

RECRUITMENT

Participant recruitment strategies developed and evolved over time due to unforeseen challenges including hesitancy among workers to speak with researchers

and the COVID-19 pandemic, which pushed work into the virtual sphere.[6] Shifts to remote work and restrictions on travel required the research team to recruit worker participants through virtual means. With additional funding from the Kellogg Foundation, the project was able to purchase a full suite of recruitment ads on Facebook for each research site. As funds permitted, we offered incentives to participants in the form of $10 gift cards to local retailers. Interns participating in a paid program collaboratively run by the AAMU research team, Jobs to Move America's Mississippi office, and NAACP Mississippi assisted to identify and recruit both worker and community survey respondents

Throughout the survey recruitment process, data analysis and sharing of findings through publications and presentations, the research team has been committed to ensuring the confidentiality of responses and protecting anonymity to the greatest extent possible.[7]

DATA ANALYSIS

The data collected from these surveys was analyzed at various scales using SPSS, a statistical analysis software program. The team used descriptive statistics to identify key findings; this included frequencies, cross tabs, and correlations. First responses from all participants were analyzed to identify trends in the entire two-state region. Second, responses were analyzed based on the firms where they were employed to identify and compare trends within a specific firm. Then at each of these scales of analysis the research team compared responses based on race and gender to identify how workers of diverse backgrounds are faring in the manufacturing industries at each of these scales.

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[6] In the Fall of 2019, the project launched in the city of Anniston, Alabama home to bus manufacturer New Flyer of America. Anniston served as a pilot for the broader study. While drawing on preexisting community connections we began recruiting respondents to the worker and community surveys. Lessons learned, particularly from recruitment processes, were applied to the rollout of the project into subsequent research sites. Findings from this early wave of the project were presented in a report Erickson, E. (2021). Are Good Jobs Possible in the Deep South.

[7] The project underwent Institutional Review Board (IRB) review through the AAMU Office of Research Compliance for the first time in 2019, and any modifications to the methodology and scope were submitted to IRB for re-approval (AAMU-482-R3).

Table 4 summarizes the specific measures used to assess the quality of southern manufacturing jobs. Each of the six dimensions of job quality — pay and benefits, terms of employment, work life balance, health and safety, representation and voice, and intrinsic characteristics, were evaluated based on criteria that align with specific questions. The research team developed a set of thresholds to determine what would be considered met or unmet.

For each of these criteria, the survey data was analyzed, and the criteria was assessed as met, partially met, or unmet. The thresholds for met are listed in Table 4. However, some criteria were deemed as partially met for one of two reasons. First, when criteria are assessed by multiple survey questions, some responses may meet the threshold while others do not. Secondly, when survey responses are examined beyond overall averages, some race or gender groups are not meeting the criteria. For example, with wages, although the average wage for all respondents may meet the threshold, if averages for women workers do not meet the criteria, then the measure is only partially met. Details of partially met and unmet are documented in the Appendix.

TABLE 4

Operationalizing Job Quality & Meeting Criteria

Dimension	Pay and Benefits	Terms of Employment	Work Life Balance	Health and Safety	Representation and Voice	Intrinsic Characteristics
Measure/Criteria	· Jobs pay a livable wage that would support local families · Jobs offer health insurance that is affordable and accessible	· Direct hire as an employee of the firm · Internal labor markets exist (opportunities for advancement)	· Workers are scheduled to work a reasonable number of hours · Schedules are predictable and flexible	· Safe production practices with few injuries · Workplaces are free from racial discrimination and sexual harassment (psychological health)	· Workers can file complaints without fear	· Workers report that they have pride in their work
Operationalized Measure of Dimension	· How much do you get paid per hour? · Has your current employer offered you health insurance? · Do you currently get health insurance from this employer? · How would you describe the cost and quality of this health plan?	· What best describes your employment at this firm? · My opportunities for advancement are high.	· How many hours per week do you USUALLY work at this job? · Which of the following best describes your work schedule on a weekly basis? (Whether schedule is same week to week) · How far in advance are you given notice of a change in your work schedule?	· At your current job, have you ever been seriously injured at work? · How many times have you been injured at your current job? · Have you ever noticed a product being assembled or manufactured in a way that may put workers at risk? · At your current job, have you ever been seriously injured at work? · How many times have you been injured at your current job? · Have you ever noticed a product being assembled or manufactured in a way that may put workers at risk?	· Did you feel that you could report these [production safety] issues without retaliation? · During the last 12 months, did you make a complaint, either by yourself or with co-workers, about your working conditions, by going to your employer, supervisor or going to a government agency (E.G. OSHA or the EEOC)? · How many times did you make a complaint, either alone or with your co-workers, over the past 12 months? · While working at your current job, were there times when you did not complain, even though you had a problem at your job? · Why didn't you complain? Check all that apply.	· I am proud to be working for my current employer.
Criteria Met	· Average pay is at or above living wage needed to support a family of three in the region ($26.46). · More than 80 percent offered health insurance.	· More than 80 percent are direct employees of the firm. · 75 percent or more of respondents agree or strongly agree with the statement.	· 80 percent or more of respondents work between 40 and 50 hours per week. · At least 80 percent of respondents have the same schedule week to week. For those who do not, 80 percent are given 2 or more days notice.	· Less than 10 percent report being seriously injured AND less than 20 percent report witnessing production safety issues. · Less than 20 percent report discrimination or harassment is a problem (big or small) at work.	· 80 percent or higher feel they can report issues. · AND less than 20 percent did not suppress complaints.	· 80 percent or more agree or strongly agree.

RESULTS AND ANALYSIS

This section of the report takes a two-state region perspective on the status of job quality in southern manufacturing facilities by aggregating survey responses from all eight case study sites and adding in responses from workers at other facilities who took part in the survey. In total, the findings presented in this section reflect the lived experiences of workers in Mississippi and Alabama manufacturing industries. Part II provides firm-specific analysis of job quality and workplace experiences at each of the eight case sites (Continental, Cooper, GE Aviation, Mercedes, New Flyer, North American Lighting, SMP, and Yokohama). These cases represent a diversity of firms while also highlighting the role of transportation related manufacturing in the region with tire, bus, and automotive production facilities.

Using the six dimensions of job quality (pay and benefits, terms of employment, work life balance, health and safety, representation and voice, and intrinsic characteristics), this section of the report reviews survey responses from manufacturing workers in Mississippi and Alabama and finds that too many workers are stuck in low-quality jobs. The overall results of the research, as summarized in the table below, show that job quality, as reported by most manufacturing workers, is low in the region's manufacturing facilities. Rather than industrial development and job creation leading to a growth of high-quality jobs, survey results show that these developments have created lower quality jobs.

Dimensions of Job Quality	Met for Most Survey Respondents
Pay and Benefits	PARTIALLY MET
Terms of Employment	PARTIALLY MET
Work Life Balance	**UNMET**
Health & Safety	**UNMET**
Representation & Voice	**UNMET**
Intrinsic Characteristics	PARTIALLY MET

When considering the amount of public investment of tax dollars invested into subsidizing the companies creating these manufacturing jobs — subsidies that are designed to recruit firms and create jobs in the region — the low job quality is particularly troubling. All jobs should be high quality jobs as all workers deserve good

jobs. But when the jobs are subsidized by the public, it is essential that these jobs are high quality jobs. In other words, taxpayers should not incentivize, subsidize, or support the creation of low-quality jobs.

The following section examines the respondents' profile and evaluates each of the six dimensions of job quality for the two-state region.

RESPONDENTS PROFILE

Table 5 summarizes the demographic profile of survey respondents.[8] The results show that the majority of the respondents were White (almost 60%), with Blacks making up almost 31 percent. The vast majority were male (58.1%) and 36.3 percent identified as female. The largest numbers were 26-55 years of age, representing a total of 802 (74%). Of the 1,269 workers that responded to the question on employment status, 89.4 percent (1,134) were regular workers and 10.6 percent (135) were temporary workers. Of the 932 who answered the question about job description, 285 (30.6%) indicated that they worked as assemblers. In terms of place of birth, over one-third (36%) indicated that their place of birth was Mississippi with the same proportion (36%) from Alabama. Just over 24 percent (24.3%) were from another U.S. state.

[8] Note: Respondents had the option of skipping questions, therefore total numbered answered varies by question.

TABLE 5

Demographic Profile of Worker Respondents

Race/Ethnicity	White	Black/African American	Multi-Racial	Latinx	Asian	Middle Eastern	All other	Total
Total Answered	676	348	39	13	6	2	45	**1,129**
Percent of Total	59.9	30.8	3.5	1.2	.5	.2	4.0	**100**

Sex	Male	Female	Other/Decline to State	Total
Total Answered	667	417	64	**1,148**
Percent of Total	58.1	36.3	5.5	**100**

Age	18-25	26-35	36-45	46-55	56-65	66+	Total
Total Answered	84	259	302	241	166	32	**1,084**
Percent of Total	7.7	23.9	27.9	22.2	15.3	3.0	**100**

Employment Status	Temporary	Regular	Total
Total Answered	135	1	**1,148**
Percent of Total	10.6	89.4	**100**

Job Description	Assembler	Quality Control	Maintenance	Machinist	All Other	Total
Total Answered	285	97	60	54	436	**932**
Percent of Total	30.6	10.4	6.4	5.8	46.8	**100**

Place of Birth	Alabama	Mississippi	Other US State	Outside the US	Total
Total Answered	206	206	139	22	**573**
Percent of Total	36	36	24.3	2.8	**100**

PAY & BENEFITS DIMENSION

Pay and benefits are the most fundamental measure of job quality. When jobs pay well and provide basic benefits of health insurance and retirement savings, workers and communities can experience economic stability and growth. Survey data on two measures of pay and benefit quality demonstrate mixed results. Workers in this study reported earning significantly less than a living wage that would support a family of three living in the area. Furthermore, while most respondents reported that their employer offered health insurance, many reported that it was expensive and inaccessible; this can leave workers feeling stuck at their current job as few viable alternatives exist. Yet despite these challenges, the wage and benefits packages, although not meeting livability and utility standards, remain some of the best in the region.

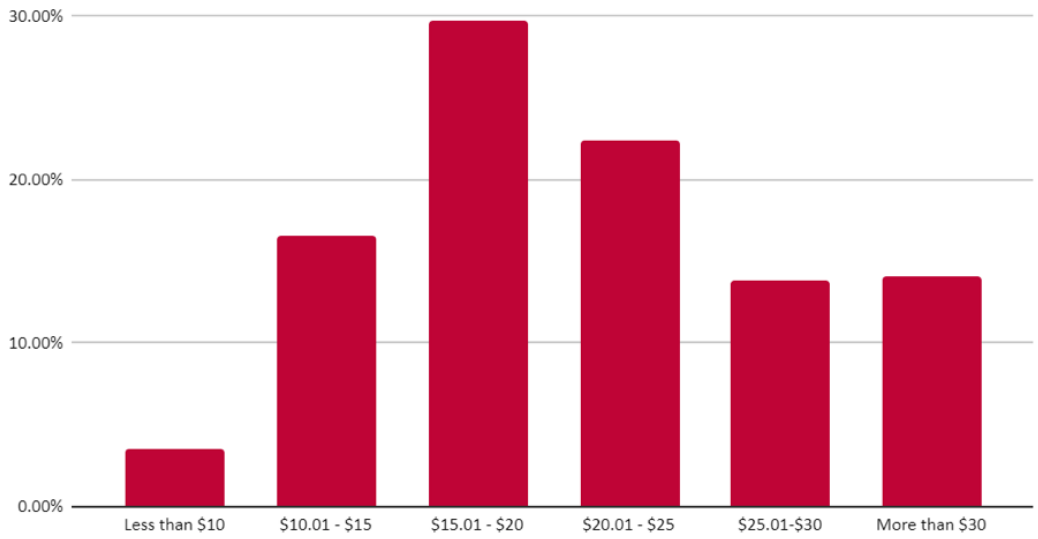
Do manufacturing jobs in the South pay a living wage? According to the MIT living wage calculator, in 2019 workers needed to earn $26.46 an hour to support a family of three (Glasmeier, 2020). The average reported wage among those working in manufacturing in this study was 26 percent below this livable standard at $20.93 an hour. While $20 an hour is significantly higher than the federal minimum wage[9], comparing it to the living wage calculator, it is clear that average earnings in the region's manufacturing facilities are unlikely to provide enough money to support a middle-class lifestyle for a family of three. Furthermore, these wages may not accurately reflect the amount of skill, training, and physical strain required for many manufacturing jobs.

The average wage tells only part of the story of compensation in these manufacturing facilities. Some workers reported earning significantly higher than this average and others reported earning significantly lower (see Figure 2). The range of hourly wages is a reminder that some are earning significantly less than this overall average of $20.93 an hour. Among respondents who reported an hourly wage, 1 in 5 (or 20%) reported earning $15 an hour or less at their manufacturing facility. Another thirty percent earned between $15 and $20 per hour.

[9] Both Mississippi and Alabama do not have a state minimum wage and instead use the federal minimum currently set at $7.25 per hour.

FIGURE 2

Average Hourly Wage of Survey Respondents



While average wages reported among respondents were fairly high for the region, not all workers experience the same earning opportunities. When comparing average wages by race and sex, survey data identifies troubling wage gaps. On average, women and workers of color reported earning lower wages than their male and White counterparts. On average, women earned $4.48 per hour less than male respondents. Black respondents earned 17 percent less than Whites. This is a $3.84 per hour racial wage gap separating the average Black and White workers' reported wages. While this gap does not consider specific job categories, length of time at the company and other important variables, we are able to observe racial wage gaps among workers within the same category of job. For example, White Assemblers reported an average wage that is $1.85 per hour higher than the average wage reported by Black Assemblers. While workers across racial and ethnic identities reported earnings below livability standards for the region, Black workers were at a greater disadvantage than White workers.

While wages are above the federal minimum wage of $7.25 an hour, and higher than what many advocates are calling for as a new federal minimum of $15.00 an hour, wages are not enough to support an entire family, and are unlikely to provide economic stability and entrance into the middle class. They are also marked by racial and gender inequalities.

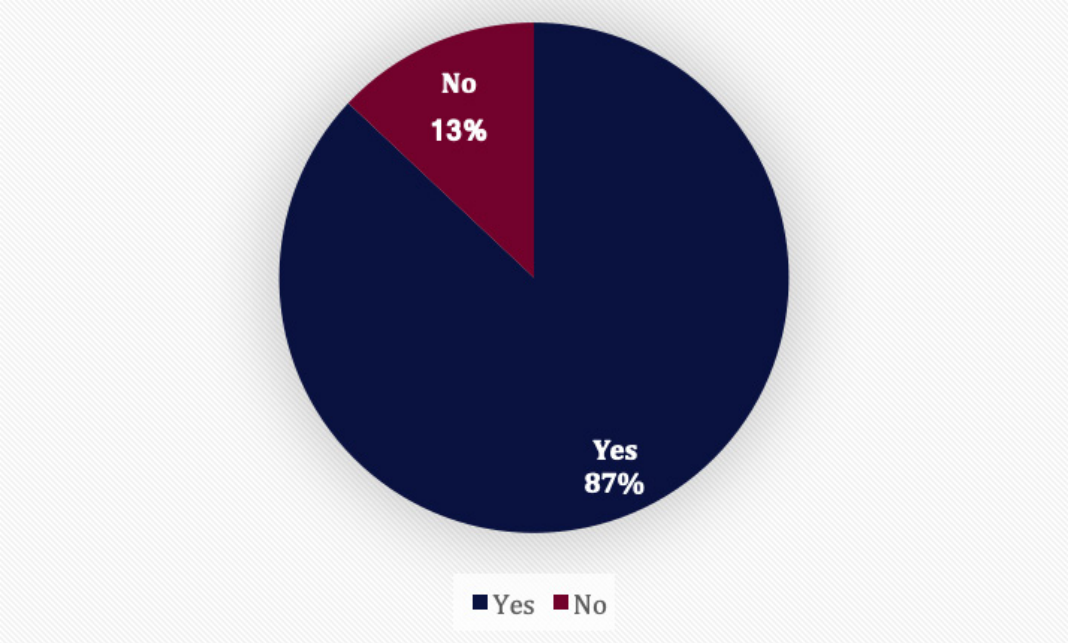
In open-ended responses, some workers highlighted the effect of their geography on keeping wages low. One worker wrote that, "For the area, it is the best pay and benefits that I am aware of." Another worker wrote that they "believe the company takes advantage of workers here in Alabama because of low wages and they know its

(sic) hard to find a job with equal pay and benefits." Another worker attributed lower or modest wages, in part, to the state's policy environment, writing that, "Working at my job or in the state of Mississippi for that matter is drastically unfair to the workers. Being in a 'work-at-will state' companies take advantage of pay, benefits, and hours. If you need time off, you're fired. If you have medical issues that cause you to miss work, you're fired. If you need to go to the doctor more than 6 times a year, you're fired. Poor quality of product being sent to the production line and having to make do with what we are given and be at work doing production six days a week, 10 hours a day. We barely get time with family, time to pay bills, time to go to the doctor, time to go to the bank, or time to even relax." As a worker at a defense contractor explained, "They pay you enough knowing you can't find that type of base pay anywhere else in the tri-state area. Then treat you the way they want because they know you will probably take it."

Do manufacturing jobs in the South provide basic benefits like health insurance? Most workers represented in this survey have been offered and receive health insurance through their employer — 95 percent of respondents reported being offered employee sponsored health insurance and 87 percent received health insurance from their employer. These results held when comparing rates by the race of respondents.

FIGURE 3

Percentage of Respondents Receiving Health Insurance from Employer

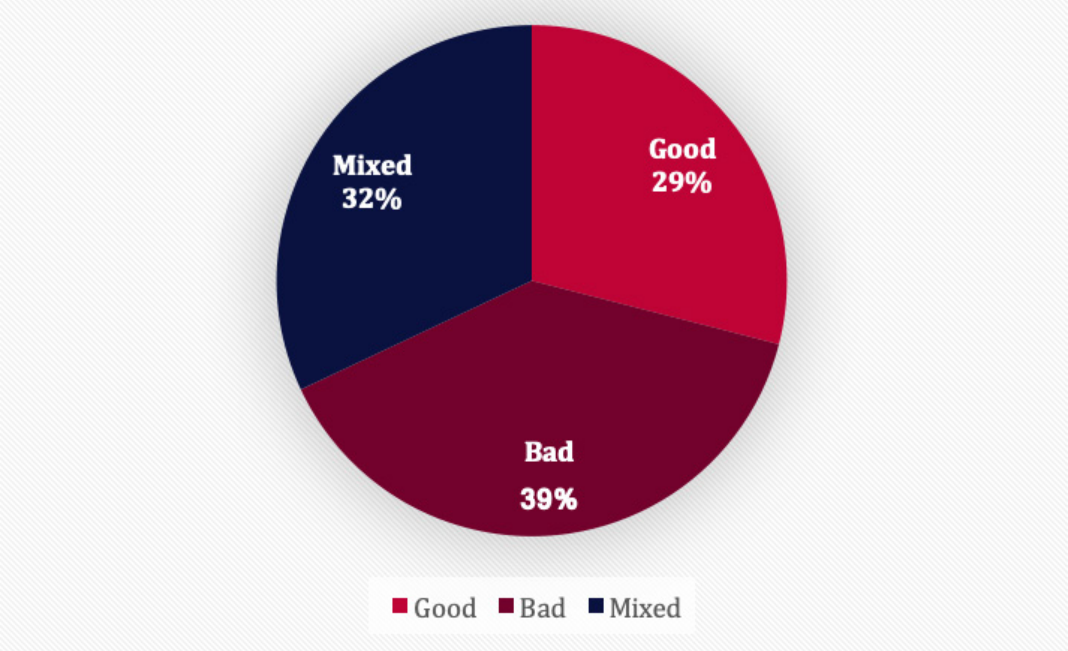


When asked to describe the “cost and quality” of their health insurance plan workers had a variety of opinions reflecting a variety of insurance offerings, costs, and needs. Of the 387 written responses to this question, 330 of them have been coded as rating the cost and quality of insurance as either good, bad, or mixed/medium. The largest portion reported negative responses (130 responses, or 39%). These ranged from “awful” and “bad” to stories of specific challenges faced in navigating health plans. One worker reported that “Cost is ok, quality is ridiculous, made us change my wife’s medicines [when she ran out] she suffered withdrawals from her medicines for almost 2 weeks.” Other workers were more direct, writing their worker provided health insurance “isn’t worth a shit.”

For the 29 percent who reported that their health insurance was good, many wrote in that coverage was “affordable and great coverage” or “best I’ve ever had” and “good insurance at a fair price.” The remaining 32 percent of responses had a mixed or average review of their health insurance benefits (Figure 4). Examples of mixed reviews are “cost is good quality is horrible” and “cost is high but plan is great.”

FIGURE 4

Respondents Rating of Employer Offered Health Insurance Plan



A frequent observation is that quality and affordability of health insurance is declining, workers wrote that costs are rising but quality is either staying the same or worsening. One worker pointed to different insurance coverages based on tenure at the firm, “Very bad insurance with high deductible and have to pay out of pocket unless you started before 2008. Those employees have great health insurance benefits.” Another

worker calculated that their overall compensation package had decreased in recent years as premiums and costs of living both rose at a faster pace than wages.

Compared to many other jobs in the South, the manufacturing jobs in these plants offer relatively higher wages and provide for health insurance. However, to leave the analysis here is to miss the strain that workers find themselves working under as relatively well-paying jobs still do not always pay enough. Or that health coverage on paper may not result in receiving needed health care. Manufacturing jobs in the region only partially meet the indicators for this first dimension of job quality. Given all of these, the first dimension of job quality, pay and benefits, is only partially met as wages are lower than the livability standard, but at least health insurance is available.

Dimensions of Job Quality	Measure	Met for Most Survey Respondents
Pay and Benefits	Pays a living wage	**UNMET**
	Offers affordable and accessible health insurance	MET

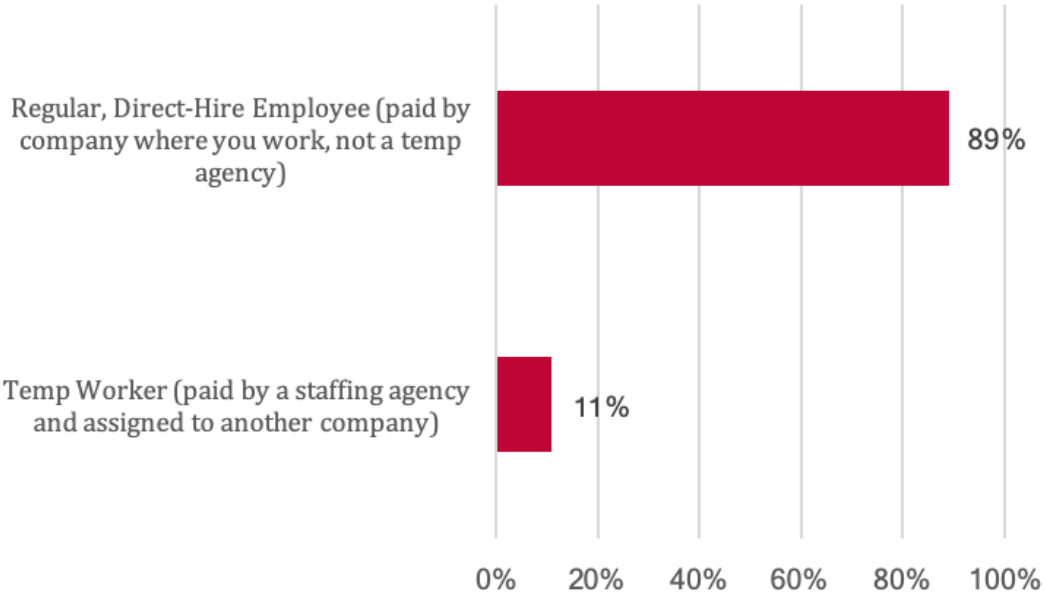
TERMS OF EMPLOYMENT DIMENSION

Full-time, employment arrangements and opportunities for upward mobility are the second dimension of job quality. Internal labor markets, or job ladders which provide pathways for advancement, are indicators that jobs are not dead ends. Terms of employment is the second dimension of job quality considered in this analysis of southern manufacturing jobs.

Do manufacturing firms in the South hire workers as direct employees and provide career advancement opportunities? Most manufacturing workers in this data set reported being direct employees of their firm. Only 11 percent reported being temporary workers (Figure 5). This was surprising given the widespread trend in temp-to-hire in manufacturing and related industries across the region and country. In some open-ended responses, a handful of workers identified that they had started as a temporary employee but graduated into a permanent contract. Not included in this sample, however, are workers who left their job or left the industry. The survey clearly targeted current workers in regional manufacturing facilities. People pushed out of the industry are therefore not represented in this portrait of job quality.

FIGURE 5

Respondents by Employment Type

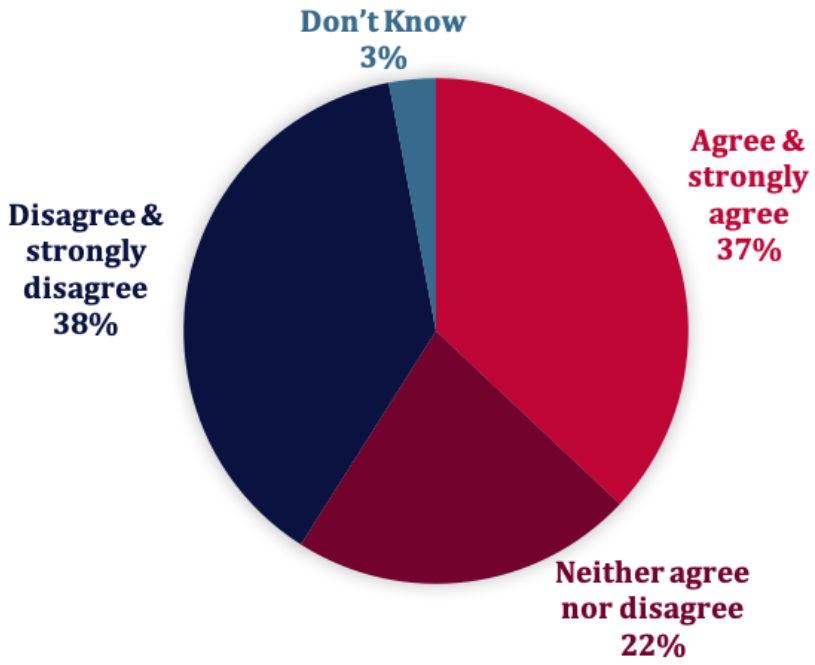


When examining the rates of temporary employment status by demographic characteristics, some interesting trends emerge. Although just 8 percent of White workers reported being a temporary employee, 15 percent of non-White workers are temporary workers (this includes 14 percent of African Americans and 23 percent of those who identified as multiracial). Female workers also reported being temporary employees at higher rates than male workers. Thirteen percent of female and 9 percent of male workers are on temporary contracts.

Do manufacturing jobs in the South provide opportunities for career advancement? When asked if they felt that opportunities for advancement are high, workers were evenly split. Thirty-seven percent agree or strongly agree, and 38 percent disagree or strongly disagree (Figure 6). Internal labor markets, or clear career pathways for advancement within firms, are clear markers of job quality. Yet workers are split about if their opportunities for advancement are present or not at their current manufacturing job.

FIGURE 6

Respondents' Opinions on Opportunities for Career Advancement



There was no significant difference in the opportunities for advancement when looking at the race and gender of the survey respondents. A challenge to career progression that was mentioned multiple times in the open-ended responses was the presence of an "old boys (sic) network" or a culture of nepotism where friends and family of hiring managers had access to upward mobility but those without such connections or outside of the network were stagnate. This is exemplified by one worker who wrote "Promotions are based on who you know."

Given that some of these manufacturing firms are the largest employers in their community, pay, benefits, and longevity may have an outsized importance. This is reflected in the 44 percent of workers who reported that it would be "not easy at all" to find a job with another employer that has similar pay and benefits to their current manufacturer. This is an incentive for workers to stay at their current job, despite the mixed opportunity for advancement.

The terms of employment that dictate employment status and opportunities for career progression provide another mixed bag for Southern manufacturing workers. Although most workers reported being direct employees, this job security is undercut by the at-will nature of employment in the region and lack of upward mobility turning many jobs into dead ends. In the end, the terms of employment findings indicate that manufacturing jobs in Mississippi and Alabama have mixed results, meeting the measure of direct employment, but not for career advancement.

Dimensions of Job Quality	Measure	Met for Most Survey Respondents
Terms of employment	Direct hire as an employee of the firm	MET
	Opportunities for career advancement	**UNMET**

WORK LIFE BALANCE DIMENSION

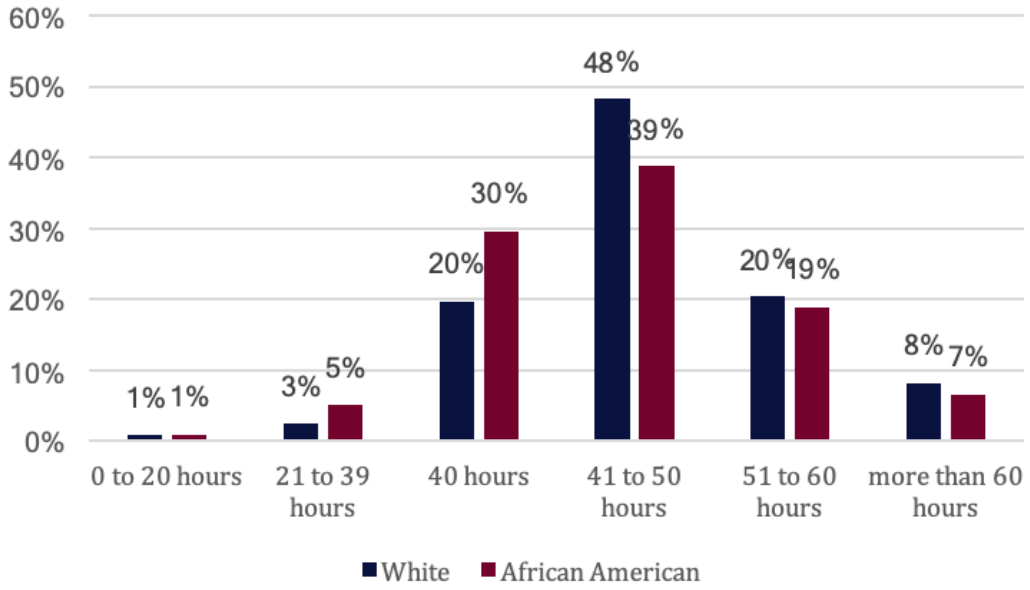
The ability for workers to balance the demands of their jobs with the demands of their personal life, particularly caring for children, is the third core dimension of job quality assessed in the survey results. The overall work life balance afforded by manufacturing jobs is assessed by examining the number of hours workers put in every week and the predictability of schedules reported by survey takers. Data from this survey indicate that many manufacturing workers in the region face long shifts with frequently changing schedules.

Do manufacturing jobs in the South provide a reasonable number of working hours? While nearly all (95%) of the workers who partook in this survey are employed full time at their worksite, many work above and beyond the 40 hour per week standard, resulting in very long workdays at what is often physically demanding work.

While a quarter of respondents work a traditional 40-hour work week, a majority of respondents work more than 40 hours every week. Nearly half of respondents (45%) work between 41 and 50 hours per week, and another 19 percent work 51-60 hours in a week. Eight percent of workers reported working over 60 hours at their manufacturing job. Results were consistent regardless of the respondents race or gender. Figure 7 shows the result by race.

FIGURE 7

Average Number of Hours Respondents Worked Weekly by Race



Do manufacturing jobs in the South provide predictable work schedules?

Another challenge facing these workers are long shifts that change often with little advance notice. When managers change worker shifts, workers have to adjust their personal lives to accommodate. This can mean rearranging childcare, school pickups, doctors' appointments, and social gatherings. For workers at sites where they are given only a few hours advance notice of a shift change, this can present serious upheavals in personal lives and serve as barriers to long-term employment for working parents. Given the share of domestic labor that falls on women, such scheduling problems are likely to have a greater impact on their employment status.

Half of survey respondents have a variable work schedule. For 20 percent of workers, their work schedule changes only "once in a while." But for nearly 1 in 3 respondents (30%), their work schedule changes "from week to week." This means that each week a third of manufacturing workers are having to renegotiate commute hours, childcare pickups and drop offs, attending after work sports leagues, and stopping at the market on the way home from work.

The personal juggling required with a shifting work schedule is magnified when sufficient advance notice of changes does not take place. For those workers who have variable schedules, 42 percent are given only a few hours advance notice. Another quarter are given one day notice. That means workers have just a few hours to rearrange personal lives to fit within work schedules. Noncompliance with such schedule demands may risk sacrificing hours and pay.

Given that hours are often long and schedules variable, this dimension of job quality is determined to be unmet for workers in this survey. This is seen also in the open-ended survey questions that invited workers to share any other ideas or experiences. Many took the opportunity to decry working hours, schedules, and the inability to have any semblance of a work life balance.

One worker at an automotive parts supplier wrote "The work hours are like slavery (7 days a week and sometimes mandatory 12 hr. shifts) unexpectedly, and very short notice, they tell you the day of and sometimes even at the end of your shift when you're expecting to go home. The pay and money is good but we have families, we are human, we get sick, we get tired too sometimes." Another said that their job "Used to be three 8 hour shifts now there are two 10.5-hour shifts. I work 6 days a week and hardly have any family time. Yes, I make more money but we're all exhausted and none of my coworkers are happy at all.... Everyone with a family feels trapped."

Based on the analysis, the third dimension of job quality, work life balance, is found to be unmet by manufacturing jobs in the region.

Dimensions of Job Quality	Measure	Met for Most Survey Respondents
Work Life Balance	Scheduled to work a reasonable number of hours	**UNMET**
	Schedules are predictable and flexible	**UNMET**

HEALTH AND SAFETY DIMENSION

The health and safety of workers, provision of safe working environments, and psychological health of workers — including the freedom from harassment and discrimination is the fourth dimension of job quality considered in this report. This dimension is evaluated using two measures: workplace injuries and racial and sexual discrimination. Racial and sexual discrimination are listed here as they contribute to the cultural environment of the workplace and the psychological health of workers.

Manufacturing work is often dangerous with heavy machinery, fast pace of work, repetitive nature of work, and exposure to industrial solvents and chemicals. Occupational health and safety standards are designed to minimize risks from such dangers. However, injury rates reported among survey respondents are considerably higher than national standards. The Centers for Disease Control reported a national average of 6.6 injuries per 100 full time manufacturing workers (The National Institute for Occupational Safety and Health, 2019). Injury rates among survey takers in southern manufacturing plants are as high as 20 percent in some facilities. These physical injury rates, coupled with reported working environments that are hostile

to women and minority workers mean that this health and safety dimension of job quality is not met for manufacturing workers in the South.

Do manufacturing jobs in the South protect workers from injury? Working with heavy machinery on active production lines has inherent risks. How these risks are managed and how frequently workers face injury is an important indicator of overall health and safety of the job. One-third of respondents reported witnessing production practices that put workers at risk. This could be lines moving too quickly for workers to keep up, insufficient number of staff for a given task, trip hazards, and other pitfalls inherent in industrial manufacturing.

Many jobs in a manufacturing facility are physically demanding. As one survey respondent wrote, "the work we do every day is very strenuous on your body", and another explained that "the ergonomic conditions are horrible compared to our German sister company." Sometimes the risks add up. Respondents provided examples of unsafe workplace practices such as, "Nail guns are not monitored or repaired. Machines are not caged properly, electrical wires on floor, sawdust fan causes fire, sawdust is not vacuumed away and fills the air we breathe. Truck drivers going over mandated allowed drive time." Another worker at a facility pointed to the risks some workers take, "reaching into pinch points, placing themselves into line of fire." In relation to the recent global pandemic workers reported a lack of Covid protocols; "COVID 19 is passed from person to person because of handling the same parts on the assembly line."

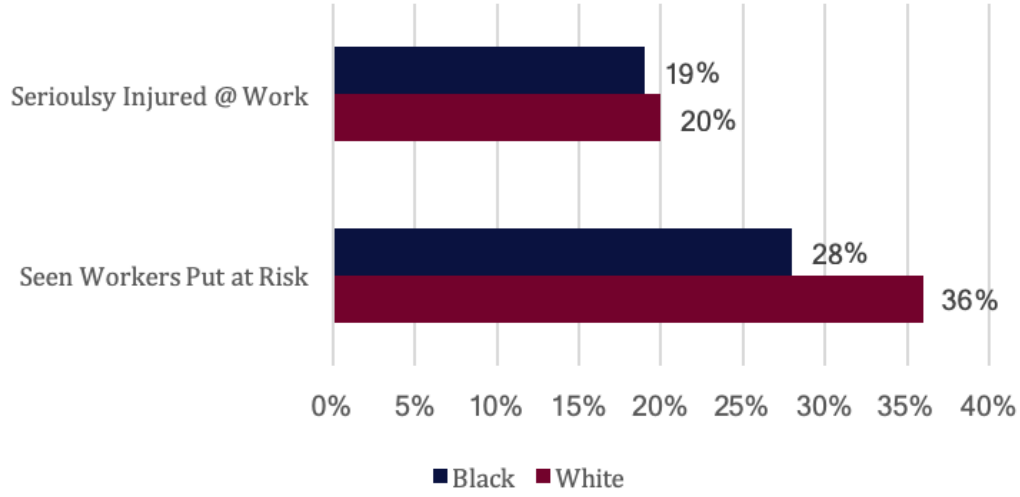
One out of every five respondents, or 20 percent, reported being seriously injured while at work.

Working in the region's manufacturing centers is a high-risk endeavor for all workers regardless of race or gender. One out of every five respondents, or 20 percent, reported being seriously injured while at work (injured to the point of needing medical attention — even if they did not receive it). Figure 8 shows the respondents' opinions on injury and risks at manufacturing plants.

In the open-ended responses, some workers highlight another health-related issue of particular importance in the southern climate — heat exhaustion. Summer months in Mississippi and Alabama are hot and humid, and some facilities do not have air conditioning; "it's hot in the summer with no air at all." Physically demanding work, long hours, and hot weather can be a dangerous mix.

FIGURE 8

Health and Safety Issues as Reported by Survey Respondents



Do manufacturing jobs in the South provide equality of access and treatment regardless of race or gender? The survey inquired about personal experiences with unequal and unfair treatment. Additionally, responses to core areas of job quality are analyzed by racial and gender identity. This cross tabulation of survey data allows the comparison of experiences reported based on the race and gender of workers.[10] In case after case, Black workers in this data set reported worse working conditions and lower average wages than White workers. Although women only represented a small portion of the overall sample, they reported experiencing sexual harassment and uncomfortable workplaces.

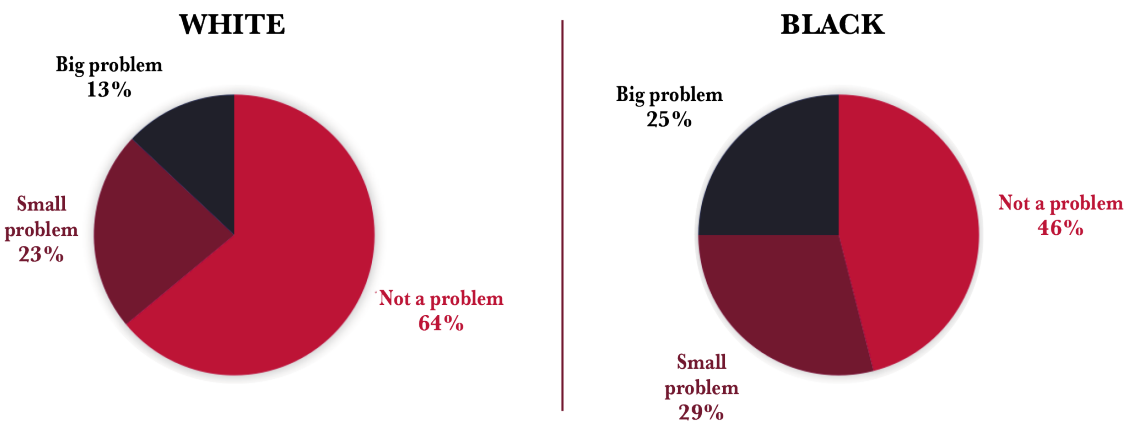
To gauge the overall workplace environment the survey asked if racial discrimination is a problem at their job — 19 percent of all workers reported that racial discrimination is a "big problem" at their workplace. Another 25 percent of workers reported that racial discrimination is a "small problem." Collectively this means that just under half of respondents report that racial discrimination is a problem at work.

Breaking these results down by race shows a somewhat different perspective (Figure 9). Only 36 percent of White workers reported that racism is either a big or small problem at work, but 55 percent of Black workers reported that racism is either a big or small problem. This is a 19 percent gap in perspectives on the workplace environment. More specifically, one quarter of Black respondents report that racial discrimination is a "big problem" at their workplace.

[10] Because the overall number of responses for racial groups other than White and Black workers are low, this report does not disaggregate any other racial or ethnic group.

FIGURE 9

Respondents Opinion on the Level of Racial Discrimination at their Jobs



The survey provides a list of common workplace experiences of racial discrimination. Black survey respondents reported 280 instances of discriminatory treatment; some workers reported multiple instances. The two most frequently reported experiences among Black respondents are:

- Received less support from senior leaders than a person of a different race who was doing the same job (27%)
- Had someone treat you as if you were not competent because of your race (24%)

In addition to these specific questions of racially discriminatory treatment or environments, Black workers repeatedly reported worse working conditions and lower job quality than White workers. This has been highlighted in earlier discussions of specific dimensions of job quality but is also summarized here. Average reported wages for Black workers are $3.84 less per hour than White workers and Black workers are more likely to be temporary employees.

In open ended survey questions, some workers used the opportunity to share their experiences with racial hostility or sexual harassment in the workplace. As one worker summed up, “Not too bad of a place to work only for the money but there is racism, bullying and intimidation present.” Another described moving to the region and getting a job at the same facility as a family member: “I was very excited to start working [there].... I started working and the racism began from the get go!! I didn’t stand a chance. I never have been treated this way in all my life. Working at a job and putting up with that is not worth it!!!!” Another worker wrote “Sexual misconduct is rampant. Physical violence. Theft. It's like working at an inner-city school.” One female worker wrote, “Racial inequality against Black women need to be addressed. Supervisor and leader harassing me [because] I’m black woman. He makes me do other jobs that he doesn’t move or make the White woman do. I’m scared to speak up fear of losing my job or they will make things harder on me.”

According to our survey respondents, working in southern manufacturing facilities comes with risk of physical and psychological injury. In this dimension of job quality, which considers physical and psychological health of workers and workplaces, southern manufacturing facilities are not meeting the mark. Instead, one in five of the survey respondents reported being seriously injured at work and women and workers of color point to troubling environments rife with harassment and discrimination. And yet there are even more extreme cases of unsafe and hostile workplace environments in some of the case studies in this report. At some specific firms, Black workers face even higher levels of discrimination and injury than is demonstrated in this section's regional overview.

These findings indicate that the fourth dimension of job quality, health and safety, is found to be unmet by manufacturing jobs in the two-state region.

Dimensions of Job Quality	Measure	Met for Most Survey Respondents
Health and Safety	Safe production practices	**UNMET**
	Workplaces are free from racial and sex discrimination	**UNMET**

REPRESENTATION & VOICE DIMENSION

While unions provide a traditional means of both worker representation and voice, none of the facilities examined in detail for this project are represented by a union. Instead of this measure of representation, this report looks at the ability of workers to file complaints without fear of retaliation as a key indicator of their overall voice in the production and management processes. Fear of reporting issues is a form of silencing workers and often means that important issues go unresolved.

Do manufacturing workers in the South have the ability to file complaints and speak up at work? While this report earlier described workers reporting unsafe workplace practices, very few felt safe reporting such issues to supervisors and managers. Among workers who did witness safety problems at work, 72 percent did not feel they could report such problems without facing retaliatory actions from managers or supervisors. Such high levels of fear likely contribute to the injury rates reported as known issues go unreported and therefore unresolved.

Female workers are less likely than male workers to have reported feeling able to report health or safety issues to their supervisors without experiencing retaliation. Three-quarters (76 percent) of female workers and two-thirds (66 percent) of male workers did not feel they could report without retaliation. Workers of different racial

groups had less variation in their responses to fears of retaliation — 72 percent of White workers and 79 percent of Black workers did not feel safe filing complaints.

In addition to reporting health and safety concerns in the production process to their managers or supervisors, workers may choose to file formal complaints with their employer or an outside regulatory agency such as the Occupational Health and Safety Administration (OSHA). Approximately one-quarter (23%) of workers reported having filed such a complaint within the previous 12 months. Most only filed one or two complaints over the 12-month period, but 45 percent of those who filed a complaint had filed three or more in the preceding year.

Among those who did not file a formal complaint with their employer or a government agency, about half of workers felt they had cause to do so but chose not to go through the formal process. The top three reasons for not filing a complaint are:

- Didn't think it would make a difference (66%)
- Afraid of losing your job (30%)
- Observed other co-workers disciplined (fired, threatened or treated badly) for speaking up (23%)

Using the ability to speak out and provide feedback to supervisors and managers serves as a measure of worker voice and representation. On this measure, southern manufacturing jobs do not meet the mark. Instead, workers are fearful of reporting issues to their supervisors or filing formal complaints. They fear retaliation for such actions. These fears may not be unfounded as 23 percent of respondents who did not file a complaint but had cause to do so reported having witnessed other coworkers being disciplined (fired, threatened or treated badly) for speaking up. These sentiments are summed up by this worker who said, “Employees don’t have a voice. We all be afraid to speak up for fear of reprimand or losing jobs.” Based on these findings, the fifth dimension of job quality, representation & voice, is found to be unmet by manufacturing jobs in the region.

Dimensions of Job Quality	Measure	Met for Most Survey Respondents
Representation & Voice	Workers can file complaints without fear	**UNMET**

INTRINSIC CHARACTERISTICS DIMENSION

The intrinsic nature of work, the sense of meaning and purpose a worker derives from their everyday job, is the final dimension of job quality examined in this report. Measured by workers reporting a feeling of pride in their work, manufacturing jobs in the South largely met this metric. Workers reporting high rates of pride in work while simultaneously reporting poor working conditions may at first seem

contradictory. However, academic research on the psychology of work shows that is not surprising. Research on the "psychological contract" that exists between worker and employer provides some insight. The psychological contract is the belief in a promise of "reciprocal obligations" between worker and employer — a set of expectations and obligations that bind the two parties (Rigotti, 2009). But a breach of these psychological contracts can change worker attitudes and sense of belonging. Breaches occur when "employees believe that their employer has failed to fulfil its obligations towards the employee" (Conway & Briner, 2005, p. 2). In this light, if manufacturing workers report pride and attachment to their employer despite adverse working conditions, it may be that the threshold of a breach has not yet been met — the job isn't bad enough yet or that workers are evaluating their psychological contracts in relation to others in the community — so called "referent cognitions theory" (Rigotti, 2009).

Do manufacturing workers in the South express a sense of pride derived from their work? Despite many of the challenges discussed in the previous paragraphs, many workers are proud to be working for their manufacturing firm. Just over half (51%) of respondents reported that they are "proud to be working for [their] current employer." Twenty percent disagreed or strongly disagreed with the assertion of pride. Rates of pride, or lack of it, were consistent regardless of a respondent's race or gender identity.

Open-ended survey questions provided opportunities for a variety of perspectives about the meaning and pride respondents derived from their work. One worker at an automotive parts supplier in Alabama expressed great pride and satisfaction in their time with the company writing, "[the company is] good to me so I make sure I put my all my 1000% into their work That's something a lot of people have to understand in automotive; it must be taken very serious because you're not just dealing with an expensive vehicle but a lot people's lives that plan to drive these vehicles." This worker expressed pride and meaning in the work and the product he or she is producing.

Another worker at an electronics maker described their experiences writing "excellent pay, benefits, people, and job security. Extremely thankful for my 14 years at [firm]. They are currently paying for my Bachelor's Degree, and I will be moving into … the front office soon." Another worker was proud to be part of such a large organization, saying that they are "proud to work for a fortune 500 company."

While some workers expressed such pride, others tempered their pride of work with complaints about their workplace experiences. Workers simultaneously expressed dissatisfaction with management and perceived declines in job quality. This is exemplified in this Alabama worker's quote:

"Was proud to say I worked for my Employer in the beginning. After buyouts we're issued in 08/09, it became a joke and everything was being taken away. Pay was

stagnant and benefits and bonuses were less, [the] temporary work force has destroyed our moral and well being here. 2-tier wage system and lack of integrity will make it all come down one day. I have a good job, but can't say the same for the rest that break their backs everyday on that line. It's a real tragedy and a story that will go down as a laughing stock to the state of Alabama."

Other workers expressed feeling taken advantage of, or even abused by their employer. A female worker wrote "When I first began, I enjoyed my job and was proud to be at my job. Now after situations, discrimination for being a female among a couple to name, I almost hate going there!" This tension between enjoying the work, being proud of the efforts, but hating the work environment is representative of why this dimension of job quality is partially met in southern manufacturing facilities.

Dimensions of Job Quality	Measure	Met for Most Survey Respondents
Intrinsic Characteristics	Workers report having pride in their work	MET

SUMMARY

Using data from more than thirteen hundred surveys from manufacturing workers across the states of Mississippi and Alabama, this report analyzes worker experiences along six dimensions of job quality. The results are from the perspectives of the survey respondents; however, they offer potential insights that can be used to improve the quality of jobs offered in the region and ultimately impact economic security and poverty alleviation.

In the first dimension, pay and benefits, manufacturing jobs only partially meet the target. Although the jobs are some of the better paying jobs in the area, they still do not provide truly living wages that will work to uplift families and economies. In the second dimension, terms of employment, southern manufacturing facilities again only partially meet the target. Although most jobs are permanent positions, there are limited opportunities for upward career mobility. The third, fourth, and fifth dimensions of job quality are all unmet. Work-life balance is virtually nonexistent for many southern manufacturing workers who put in long shifts with variable schedules. High rates of injury, racial hostility, and sexual harassment in the workplace mean that the health and safety dimension of job quality is unmet. Fear of retaliation, which silences workers from speaking up about problems at work means that the fifth dimension of representation and voice, is unmet. The final dimension of job quality, intrinsic characteristics, is partially met. Although about half of workers expressed pride in their work, many tempered this pride with stories of unfair or mistreatment by their employers.

Together, survey respondents point to the challenges inherent in the economic development policies that often do not include basic community and worker protections. Industrial development in the South is fueled by highly mobile capital, low-wage, and pro-business policy environments. While elected leaders celebrate every new firm opening as a job creator and economic engine well worth the public investment in corporate subsidies and incentives, poverty and inequality throughout the region persist.

COMMUNITY

The challenges to job quality examined in the worker survey data above are contextualized by an examination of community needs and attitudes. By understanding experiences inside manufacturing facilities and attitudes outside, a more holistic portrait of the broader impact of industrial development is possible. The promise of job creation as a rationale for providing public incentives and subsidies to large corporations is premised on the idea that the jobs created will have spillover effects and result in economic development across the community. In addition to worker surveys in the two states, the research team created and distributed a community survey to residents in communities adjacent to large manufacturing facilities. This section of the report presents results from 191 residents of manufacturing communities in Mississippi and Alabama. These results are presented together to demonstrate the regional experiences of life in a manufacturing town.

RESPONDENT PROFILE

Included in this analysis are 191 residents of manufacturing communities. Respondents are evenly spread across the two-state region with 48 percent (n=92) from Mississippi and 52 percent (n=99) from Alabama. Respondents are evenly split between the region's two largest racial groups — 48 percent are White and 47 percent are Black. Five percent are from some other racial or ethnic group including 1.1 percent Middle Eastern and 0.5 percent Latinx. Fifty-seven percent of the community survey respondents are female and 41 percent male, with the remaining 3 percent other/declining to state.

Most community survey respondents live in households with two or more people present (84%). Forty-one percent of respondents had children in the household — 21 percent had one child and 20 percent had two or more children under the age of 18 living with them.

Respondents to the community survey come from a variety of economic situations. Although nearly 1 in 5 have a household income of less than $30,000 per year, another 1 in 5 reported household incomes of $90,000 or more. Thirty-eight percent have incomes between $30-$60,000 and 22 percent have incomes from $60-90,000.

Just over half of community respondents (55%) owned their homes. Thirty percent are renters and 15 percent report some other living arrangement. Among those who report paying either rent or a mortgage payment, the average monthly housing cost is $863.

To assess the needs of residents living near manufacturing communities, the community survey includes a series of questions asking participants to agree or disagree with how much each statement reflects their community. These statements, adapted from existing community needs assessment materials (see the methodology section for details), rate the employment opportunities, childhood well-being, quality of the environment, and state of the city infrastructure.

Results from this needs assessment highlight many of the challenges facing communities across the region, ranging from poor infrastructure to families in economic precarity. Results in this section are broken into four broad categories: economic, employment, community infrastructure, and environmental indicators. Table 6 below provides a summary overview of responses across all indicators within these categories.

TABLE 6

Respondents Level of Agreement on Community Indicators

Indicator		Agree or Strongly Agree*	Disagree or Strongly Disagree*
Economic Indicators	People in my neighborhood have the opportunity to make a good life.	62%	18%
	People have enough money to get by.	27%	46%
	Families have enough money to meet their needs.	28%	47%
	Children and families have decent food, clothing, and shelter.	48%	30%
Employment	People can get decent work.	52%	26%
	Jobs are available in the community.	57%	27%
	Jobs are open to all qualified people, regardless of race, age, sex, etc.	51%	34%
	Local manufacturers hire local people from the community.	58%	14%
	People with a criminal background have opportunities to get decent work.	26%	46%
Community Infrastructure	My community has enough money to provide and maintain basic infrastructure (e.g., roads, parks, safety officials).	42%	43%
	Children in our community get the care they need.	35%	41%
	Quality day care is available and affordable.	32%	41%
	Our schools work well.	43%	43%
	People who need health care can get it.	34%	48%
Environment	This is a healthy place to live.	44%	35%
	The community's air is of good quality.	47%	26%
	The community's water is of good quality.	47%	31%
	Hazardous wastes are disposed of properly.	36%	29%
	Businesses that dispose of toxic wastes in an unsafe and illegal way are fined and expected to clean up the waste.	43%	16%

ECONOMIC INDICATORS

One of the broadest questions in the community survey asks respondents to agree or disagree with the statement "people in my neighborhood have the opportunity to make a good life." Sixty-one percent of community respondents agreed or strongly agreed with this statement and 18 percent disagreed or strongly disagreed. Looking at responses by race, differences of perspectives emerge. More than twice the percentage of Black respondents disagreed or strongly disagreed that people in their neighborhood could "make a good life" compared to White respondents (24% and 11%, respectively). A selection of indicators is highlighted below to unpack this perceived opportunity gap that exists across geography and racial groups.

When asked if people "have enough money to get by", the results reflect the residents' pessimistic view on economic well-being in their community. Only twenty-seven percent of community survey respondents agreed or strongly agreed that people in their community have enough to get by and half of Black respondents disagree that people in their community can get by.

TABLE 7

Economic Indicators by Race

Economic Indicators by Race	Agree or Strongly Agree*		Disagree or Strongly Disagree*	
	Black	White	Black	White
People in my neighborhood have the opportunity to make a good life.	51%	75%	24%	11%
People have enough money to get by.	24%	30%	51%	41%
Families have enough money to meet their needs.	19%	38%	49%	45%
Children and families have decent food, clothing, and shelter.	37%	60%	38%	21%

Two additional questions asked respondents to assess the economic well-being of children and families. When asked to agree or disagree with the statement "families have enough money to meet their needs," almost half of all respondents disagreed - meaning they did not believe families had the financial resources to meet their basic needs. There was a significant gap in respondents agreeing with the statement when evaluating these results by race. Thirty-eight percent of White respondents agreed or strongly agreed compared to just 19 percent of Black respondents. While neither is

very high, the gap indicates that Black families are struggling at a greater degree than their White neighbors.

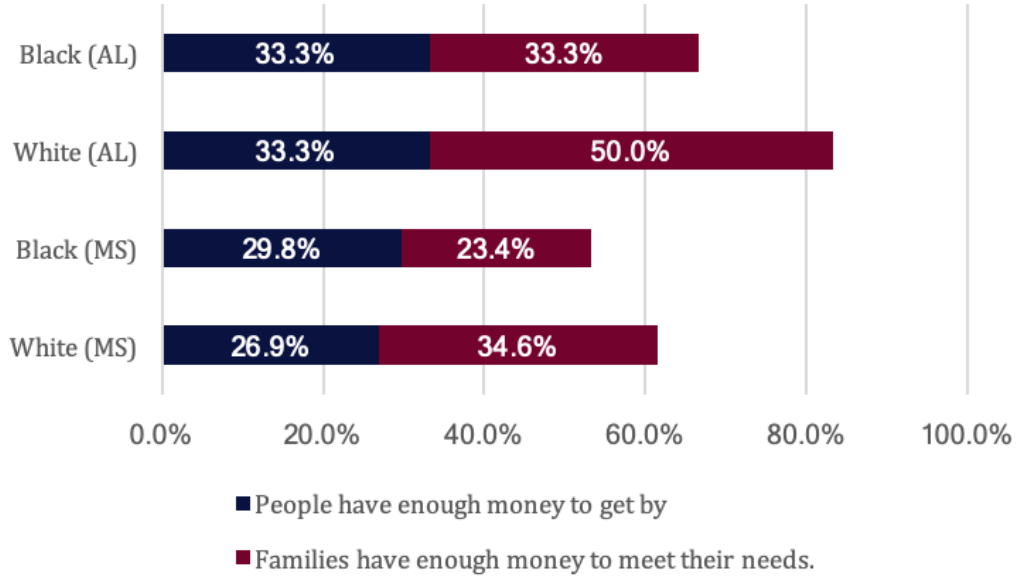
Nearly a third (30%) of community survey respondents disagree with the statement that "children and families have decent food, clothing, and shelter." In this indicator, results also demonstrate a significant gap when comparing the results by the race of the respondent. Sixty percent of White respondents agree that children and families had decent food, clothing and shelter compared to just 37 percent of Black respondents.

Taken together, these four indicators of economic well-being among residents of manufacturing communities bring to light some significant challenges for the entire community and especially for communities of color. In general, the results point to families not having enough money to get by nor meet their needs, and a significant number of people who reported that there is little opportunity to make a good life in their communities.

Examining respondent opinions about whether people and families have enough money to meet their needs by race and state, the figure below shows that between 26.9 percent and 33.3 percent of respondents felt that people have enough money to get by. The percentages were similar across race and state. Figure 10 shows more variation in the percentage of respondents (23.4% to 50%) who felt that families had enough money to meet their needs.

FIGURE 10

Respondents Level of Agreement (Strongly Agree/Agree) about Economic Needs Being Met by Race & State



EMPLOYMENT INDICATORS

Another series of questions in the community survey ask residents about employment access. Employment can provide pathways to economic well-being. Despite the large public investment in recruiting manufacturing employment to the region, jobs are hard to come by for many residents. As demonstrated in a series of five statements about access to quality employment, community respondents portrayed a complicated story of employment opportunities.

The first two indicators ask respondents to agree or disagree with the statements, "people can get decent work" and "jobs are available in the community." More than half of community survey respondents agreed or strongly agreed with both statements. When looking at these responses by race, White workers are significantly more likely to agree with the statements than Black respondents. Roughly 40 percent of Black respondents agreed with these statements about decent work and job availability compared to two-thirds and three-quarters of White respondents.

TABLE 8

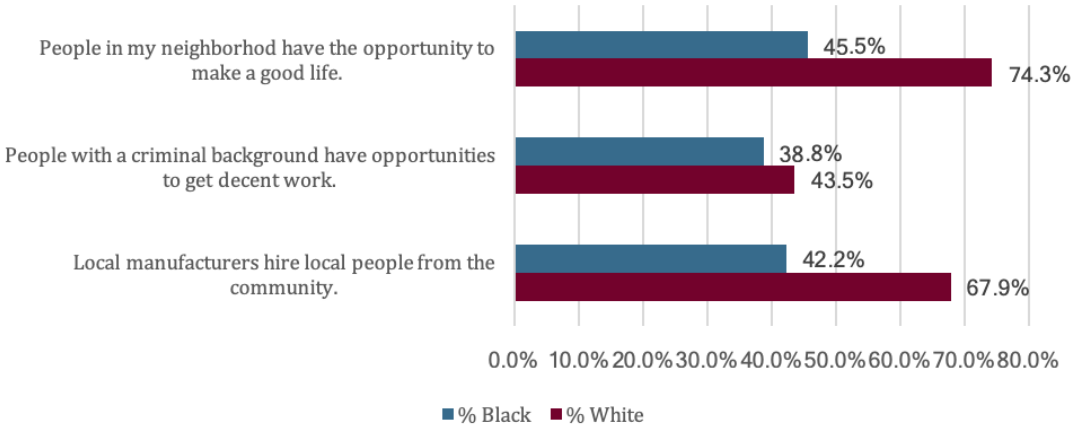
Employment Indicators by Race

Economic Indicators by Race	Agree or Strongly Agree*		Disagree or Strongly Disagree*	
	Black	White	Black	White
People can get decent work.	42%	65%	31%	20%
Jobs are available in the community.	41%	75%	37%	16%
Jobs are open to all qualified people, regardless of race, age, sex, etc.	34%	71%	49%	17%
Local manufacturers hire local people from the community.	46%	72%	22%	6%
People with a criminal background have opportunities to get decent work.	15%	38%	58%	32%

Another significant gap in responses is seen in the results of the statement "jobs are open to all qualified people, regardless of race, age, sex, etc." Just half of all respondents agreed with this statement and a third disagreed. However, just one-third of Black respondents agreed with the statement compared to 71 percent of White workers. This is a 37-percentage point gap in perspectives on job availability free from discrimination.

FIGURE 11

Opinions on Opportunities to Make a Good Life by Race



As this is a study of manufacturing work, the community survey asked respondents if "local manufactures hire local people from the community." Like the previous indicator, the general responses tell a different story from the disaggregated results. Nearly 6 in 10 community respondents agreed or strongly agreed that manufacturers hire locally. But when disaggregating the responses, we see a 26-percentage point gap between Black and White respondents. White respondents are much more likely to report that manufactures hire locally than Black respondents. This may reflect real, and perceived discriminatory hiring practices employed by some firms.

The final employment indicator is related to the availability of jobs for individuals with a criminal background. Nearly half of all respondents disagreed with the statement that "people with a criminal background have opportunities to get decent work." Black respondents are more likely to have disagreed with the statement. Fifty-eight percent disagreed compared to 32 percent of White respondents.

COMMUNITY INFRASTRUCTURE

The third set of indicators to assess the state of manufacturing communities and their needs is focused on community infrastructure. These indicators asked about a range of social infrastructure such as schools and day care, roads, parks, and health care. In many of these, manufacturing communities are found to need investment and development to support some of this basic infrastructure. In general, only one-third to one-half of respondents agreed with positive statements about their community's infrastructure.

The first infrastructure indicator asked respondents to agree or disagree with the statement "my community has enough money to provide and maintain basic infrastructure (e.g., roads, parks, safety officials)." Responses were evenly split with 42 percent agreeing with the statement and 43 percent disagreeing with the statement.

White respondents and Black respondents assessed their community infrastructure at significantly different rates. One-third of Black respondents, compared to one-half of White respondents, agreed that their community can provide basic infrastructure.

TABLE 9

Community Infrastructure Indicators by Race

Community Infrastructure Indicators by Race	Agree or Strongly Agree*		Disagree or Strongly Disagree*	
	Black	White	Black	White
My community has enough money to provide and maintain basic infrastructure (e.g., roads, parks, safety officials).	31%	54%	50%	35%
Children in our community get the care they need.	29%	42%	49%	33%
Quality day care is available and affordable.	28%	38%	42%	41%
Our schools work well.	26%	62%	53%	30%
People who need health care can get it.	33%	35%	49%	47%

Only one-third (35%) of all community survey respondents agreed with the statement that "children in our community get the care they need." And 41 percent of respondents disagreed with the statement - a grim reflection of the needs of children in the region. White respondents were more likely to agree with the statement than Black respondents.

The ability to leave the house for work is essential for individual and household well-being. However, balancing the needs of childcare, school drop-off and pick-up, and other work-life requirements can make employment a challenge. The community survey asked respondents to consider the accessibility and affordability of daycare. Only one in three respondents agreed or strongly agreed with the statement that "quality day care is available and affordable." White residents were somewhat more likely to report that daycare is available, with 38 percent of White respondents agreeing/strongly agreeing compared to 28 percent of Black respondents.

The community survey asked respondents about access to health care. Responses across racial groups are similar. Only one-third (34%) agree that "people who need health care can get it." And nearly half (48%) disagreed with the statement. Those trends held regardless of the participant's race.

THE ENVIRONMENT

The final set of indicators included in the community survey focus on the environment. Five questions were asked to assess respondents' perspectives on overall health of the community, water and air quality, and how the community deals with toxic and hazardous waste — an issue of particular importance in some manufacturing processes.

When asked to agree or disagree with the statement “this is a healthy place to live” more respondents agreed than disagreed — 44 percent agreed or strongly agreed. White respondents are more likely to agree than Black respondents (56% and 33% respectively). Similar breakdowns are observed in respondent perspectives on air and water quality, with significant gaps in responses based on race in both. When asked if “the community’s air is of good quality” nearly a third of Black respondents disagreed. When asked if “the community’s water is of good quality”, 40 percent disagreed, meaning 2 out of every 5 Black respondents reported that their water is not of good quality.

Heavy manufacturing and industrial processes often involve working with or disposing of hazardous and toxic substances. Only 36 percent of community respondents reported that “hazardous wastes are disposed of properly,” and 43 percent reported that if a business disposes of toxic wastes improperly they will be fined. These rates are similar for both White and Black respondents indicating that environmental stewardship among businesses is likely a significant issue facing many manufacturing communities.

TABLE 10

Environmental Indicators by Race

Environmental Indicators by Race	Agree or Strongly Agree*		Disagree or Strongly Disagree*	
	Black	White	Black	White
This is a healthy place to live.	33%	56%	46%	23%
The community's air is of good quality.	39%	56%	30%	21%
The community's water is of good quality.	29%	68%	40%	21%
Hazardous wastes are disposed of properly.	24%	49%	35%	21%
Businesses that dispose of toxic wastes in an unsafe and illegal way are fined and expected to clean up the waste.	40%	47%	14%	18%

Many of the challenges highlighted in manufacturing communities are born out in public reporting and census summary statistics that tell locals what they already know - that the region is home to high rates of poverty, unemployment, low education standards, and poor health outcomes. Responses to the community survey, taken by residents of neighborhoods adjacent to the industrial sites studied in this report, indicate that many of these challenges are experienced despite policy decisions to attract manufacturing jobs. For many residents, the benefits of living in a manufacturing community are hard to see given their economic insecurity, unequal access to opportunity, poor infrastructure, and public health challenges. These issues even pre-date the Covid pandemic and the current water crisis facing Jackson, MS.

CONCLUSION & RECOMMENDATIONS

Results from worker and community surveys in Mississippi and Alabama present challenges facing our workforce, but also opportunities for community-wide demands on corporations to improve working conditions. By most aggregate economic measures, Mississippi and Alabama rank at or near the bottom, suggesting that the policy of providing economic incentives to attract manufacturing firms to build or expand operations have not raised living standards or improved the local or state economies. Yet policy makers continue to subsidize private, for-profit corporations in the misguided belief that any additional jobs are worth attracting no matmatter the cost to taxpayers.

Policy makers have paid far too little attention to the quality of the jobs being created through public subsidies.

Policy makers have paid far too little attention to the quality of the jobs being created through public subsidies and have failed to recognize that all jobs are not created equal. This report underscores that the jobs the public is subsidizing should be high quality jobs that will uplift families and economies.

Across the six dimensions of job quality analyzed in this report, survey data indicate that from the perspectives of the survey respondents, many dimensions are not being met by manufacturing employers in the region. However, the story is complex as some report having well-paying jobs with decent work life balance and on-the-job experiences, but many other survey respondents did not have these experiences. Key take aways from the survey results include:

- Average reported pay is decent, and these jobs are often some of the best paid in the region. However, significant racial wage gaps are reported, and averages still do not meet what is considered needed to support a family.
- Although most jobs are permanent positions, very few respondents reported opportunities for upward career mobility.
- Work-life balance is virtually nonexistent for many respondents who put in long shifts with highly variable and difficulty to predict schedules.
- High rates of serious injury and reports of racially hostile and sexually harassing work environments are reported.

- Fear of retaliation from employers prevents workers from using their voice and speaking up to improve practices or report workplace issues.
- Many workers express pride in their work but this pride is tempered by stories of unfair or mistreatment by their employers.

All workers deserve a job that pays fairly, provides health insurance, has stable and predictable work hours, protects them from unnecessary workplace hazards, and respects the dignity of each worker regardless of their race, gender, background, or personal connections. When workers are employed at facilities receiving public subsidies and corporate welfare, these basic measures of job quality should be required. Unfortunately, in many of the cases in this report, workers at tax-payer subsidized companies, are not benefiting because the jobs created are not high-quality jobs. Instead, many employers practice low-road strategies that put workers at risk and limit the economic multiplier effect of job creation.

To date, there has been relatively little oversight of public investment in these manufacturing firms, and the promise of "jobs, jobs, jobs" does not always come with a regular audit to ensure the jobs created are good jobs, who has access to the jobs, and how the presence of job creators impact local residents. While this report is not intended to provide universal solutions for job upgrading in the South's manufacturing sector, there are some general policies and programs that may help raise the job quality floor. Such approaches can address (a) improving job quality, (b) improving access to employment, (c) ensuring local benefit for investment in corporate subsidies, and (d) avoiding smokestack chasing.

Improving job quality Governments, firms, and communities have a role to play in improving job quality. Governments have the power to establish standards that would improve job quality and utilize both carrots and sticks. In other words, government has the power to establish the rules of the employment game and can reward good practices and discourage bad practices. This includes enforcing existing rules and regulations governing employment and creating new rules when needed, along with creating incentives for business to upgrade practice. Such "carrots and sticks" approaches seek to cut off the path to employment practices that result in bad jobs and incentivize businesses to adopt strategies that lead to good jobs (Carré et al., 2012). Such regulations could be in relation to forced overtime or workplace safety issues. The firms themselves have the most direct power to influence job quality as their production and employment practices influence every dimension. Notably, firms may seek to create improved reporting environments which would allow for workers to report safety and personnel concerns without fear of retaliation from direct supervisors or managers. Communities can work to educate and support workers — ensuring they know their rights and know where to turn if issues arise. Worker centers, labor advocacy organizations, unions, and other worker-centered organizations have an important role to play in supporting improvements in job quality.

Improving Access To improve access to high quality jobs, government agencies can enforce equal employment laws, provide support and resources for those treated unfairly. An important component of access is also ensuring the skills of local workforces match the skills demanded by local employers. Public agencies can work to ensure existing training programs and traditional educational settings (including k-12 education and community college systems) are providing the skills needed to meet the needs of today's labor market. An assessment of the technical colleges and state-run job training programs may also provide insight into ways to improve access to good jobs. Public agencies and local community organizations can also work to improve matching between job seekers and employers.

Ensuring Community Benefit If public funds continue to be spent to incentivize corporations to operate facilities, there should be mechanisms in place to ensure that those footing the bill are also able to share in the benefit of such investments. For this to happen, communities must first know how their tax dollars are being spent. Campaigns to increase transparency in state investments are underway in Alabama (see Todd's 2020 report on incentives in Alabama). Similar sunshine laws applied to public incentives are necessary at every level of government.

Community benefits agreements are one way to ensure local workers and residents can capitalize on industrial developments in their backyards. The first community benefit agreement in Alabama was recently signed between a coalition of community organizations and bus manufacturer New Flyer. The agreement contains guarantees to recruit and hire racial and ethnic minorities, women, and veterans. It also calls for the creation of improved safety and reporting processes within the manufacturing facility. These are major steps forward in a region not known for proactive steps to improve job quality and increase equity in the labor markets.

Avoiding Race to the Bottom Finally, local and state governments should seek to minimize their engagement in the "race to the bottom" which often occurs when

jurisdictions compete to recruit a corporation. When capital is mobile, localities are pressured to entice capital and encourage it to remain. This means that states, counties, and municipalities are willing to provide millions of dollars in corporate welfare and subsidies to ensure a firm chooses to operate in their municipality — a direct economic benefit to that corporation. While this can encourage efficiency and ensure that products are produced in the most cost-effective manner, it can also result in governments giving away more and more without any accountability of what they are getting in return. It also can result in rearranging where jobs are located rather than truly creating new jobs.

The findings presented in this report only scratch the surface of what it means to work in Mississippi and Alabama's booming industrial sectors. This report presents a high-level summary of survey results. But future analysis could compare results on a state-by-state region and examine specific sectors within manufacturing (e.g., the tire industry or the automotive parts suppliers). Comparison with firms across geography would be another fruitful area of analysis — for example comparing workplace experiences in GE's Mississippi plant with their facilities in other areas of the country. Finally, understanding the complex racial dynamics at play in the workplace requires qualitative research that captures individual experiences and enables broader understanding.

The challenges laid out in this report are relevant to both the South and the rest of the nation. The labor practices that drive down production costs results in profits that are often exported out of the region in the form of low-cost goods for purchase in states from California to Maine and in the form of corporate profits for the companies and shareholders based outside the South. Additionally, the practices in effect within southern worksites may serve as a warning for those in other regions. The South is not behind the times relative to other regions of the nation, instead its practices and policies are exported to the rest of the nation in a form of regional convergence that sees a "Southification" of the United States. If weak labor policies and protections can make it in the South, they can make it anywhere. For this reason, the struggle for improving job quality in these plants is an important harbinger for the future of American workers. Southern workers deserve better jobs with equitable access to opportunity. Southern communities deserve to know that their tax dollars are not subsidizing businesses that seek to take the low road by creating bad jobs. Instead, workers and residents across Mississippi and Alabama deserve economic development approaches that foster business growth while also uplifting workers and communities.

PART II: CASE STUDIES

While the main body of this report (Part I) presented survey data at the regional level in order to understand the overall state of job quality in Southern manufacturing sectors, in this supplementary section data is presented on a firm-by-firm basis. Eight case sites are presented in Part II that highlight the diversity of experiences across firms — some offering better jobs than others but all with room for improvement. Of the eight case sites presented, four are in Mississippi and four are in Alabama.

Mississippi Case Sites	Alabama Case Sites
Continental Tire, Clinton	Mercedes, Vance
Cooper Tire, Tupelo	North American Lighting, Muscle Shoals
GE Aviation, Batesville	New Flyer Industries, Anniston
Yokohama Tire, West Point	SMP, Cottonwood

These sites were selected based on criteria set out by the research team, and range from industry to ownership structure, and marketplace (see the methodology writeup in the main report for a full description of how these sites were selected). Although similar recruitment strategies were used at each site, the number of survey respondents varied widely. Therefore, in addition to the base criteria for inclusion in the study, the number of respondents and completion rates (percent of fully completed surveys) was also considered when narrowing down the case sites.

The results for each case site are presented using the six dimensions this report uses to assess the aggregate survey results of job quality in Southern manufacturing facilities but does not provide a standardized assessment of meeting a certain job quality characteristic. The results paint a complex picture of job quality across the case sites. For example, while Yokohama Tire had the lowest average reported wage of all case sites ($17.02 per hour), it had no reported racial wage gap. Meaning that Black and White workers reported the same hourly wages. Likewise, Black workers at New Flyer reported that racial discrimination was a big problem at work at the highest rates (44 percent), but New Flyer workers had some of the highest rates of pride in their work. The results show that only one company exceeded the living wage rate of pay for a family of three[11] but its reported long and unpredictable work schedules were problematic. The results paint a picture of the need to improve jobs across many dimensions.

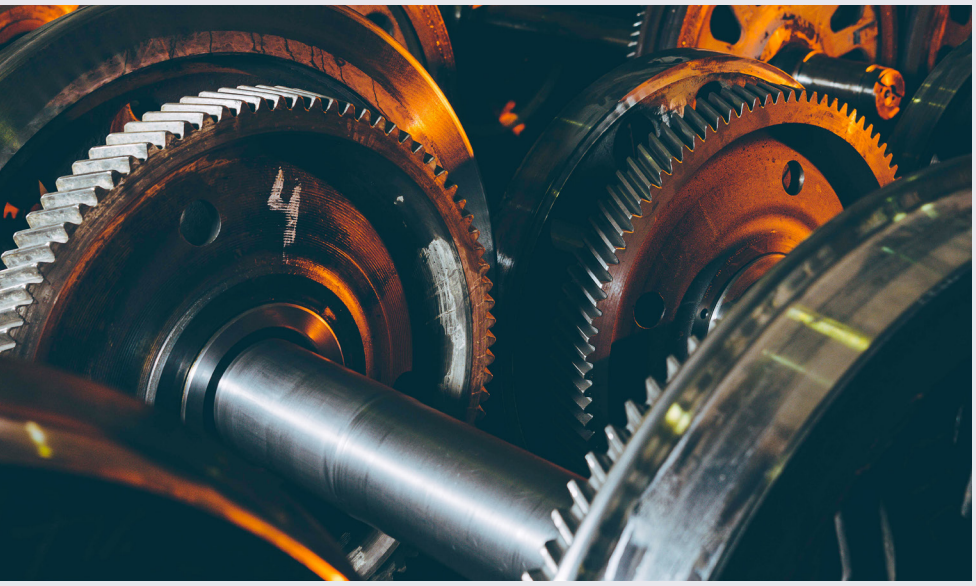
[11] As mentioned in Part I of the report, This report uses the standard wage of $26.46 per hour which is determined to be a livable wage in 2019 to support a family of three in Mississippi and Alabama, using the MIT Living Wage Calculator (Glasmeier, 2020).

The authors caution that these results are based solely on the experiences and perspectives of the respondents and are not intended to be generalized to the individual firms themselves. Firm-level results presented in this section are not intended to serve as the final word on employment situations within each company. Instead, they offer a glimpse into the experiences of individual respondents to the survey. It is the hope that such data will provide workers, employers, and community members an opportunity to engage in deeper discussions about the future of economic growth, manufacturing employment, and job quality within their communities.

Each of the case sites in this report has been the recipient of significant public investment in the form of incentives to open and maintain operations in the region. Collectively these eight companies have received almost $1.7 billion in public incentives and subsidies (Good Jobs First 2022). Understanding the impact of such investments on individuals and communities should be of paramount interest to the public and their leaders. While investing in economic growth is important, making sure it is a good investment and that the taxpayers who make these investments can enjoy the benefits should be of paramount interest.

CONTINENTAL: CLINTON, MISSISSIPPI

Continental Tire is part of the German-based Continental Group, another large multinational auto parts supplier operating manufacturing facilities in Mississippi. Continental Group has sales of $42.9 billion in 2021 and had over 190,000 employees worldwide (Fortune, 2022). The Company has three main divisions: Automotive Tech, Rubber Technologies, and Contract Manufacturing. Rubber technologies accounted for 52 percent of total revenue and the Tire segment made up two-thirds of the Rubber revenue and just over one-third of total revenue — making it the largest business segment in terms of revenue and employees (57,217) (Continental Group, 2021). Continental is the third largest tire company in the world and manufactures its tires at 13 facilities in 12 countries (Continental Tires, N.D.).



Continental operates three facilities in the United States; its largest is in Mt. Vernon, IL (3,500 employees) and another is in Sumter, SC (1,200 employees). The facility located in Clinton, MS, opened in October 2019, currently employs 400 workers, and produces large truck and bus tires for the U.S. commercial vehicle market (Continental Tires, N.D.).

In 2016, the Mississippi State legislature approved $274 million in bonds for Continental to build the facility in Clinton. In addition to state funds, local incentives brought the total to $600 million. As part of the subsidy package, Continental agreed to create 2,500 jobs that pay an average of $40,000 (Nave, 2016). All told since 2016, Continental has received over $860 million dollars from taxpayers in Mississippi (Good Jobs First, 2020a).

The city of Clinton is relatively small, making up about 10 percent of the overall working age population in Hinds County in 2019 (see Table 14 for demographic profile of the area). It had a median household income well above the County median ($62,685 compared to $44,625), and it also has a lower unemployment and poverty rate. Clinton's Black population is similar to that of Mississippi as a whole at 36 percent in 2019 but well below that of Hinds County which reported a 70.7 percent Black population over 16. Clinton also had 5 percent of its working age population identify as Asian.

TABLE 11

Demographic Overview of Clinton and Hinds County

	Clinton	Hinds County	Mississippi	Federal
Total Population (over 16)	18,966	187,160	2,354,101	259,662,880
Median Household Income	$62,685	$44,625	$45,081	$65,712
Clinton as a % of		140.47%	139.05%	95.39%
Unemployment Rate	4.3%	9.3%	7.5%	5.3%
Percent in Poverty	12.6%	21.3%	20.3%	13.4%
Percent employed in manufacturing	7.5%	7.7%	13.4%	10.1%
White/Caucasian	56.0%	27.4%	60.2%	73.9%
Black/African American	36.0%	70.7%	36.5%	12.4%
Asian	5.0%	0.8%	1.0%	5.7%
American Indian and Alaska Native	0.1%	0.1%	0.5%	0.8%
Other	2.1%	0.4%	0.9%	4.6%
Two or more races	0.8%	0.5%	0.9%	2.4%
Latinx/Hispanic*	3.2%	1.3%	2.6%	16.2%

*can represent multiple categories above therefore categories add up to more than 100% | Source: US Census Bureau American Community Survey, 2019

SUMMARY OF RESPONDENTS

To understand workplace experiences for those inside this facility, we present data from 51 workers at the Continental plant. These workers come from a diversity of backgrounds and job classifications:

TABLE 12

Demographic Profile of Continental Respondents

Race/Ethnicity	White	African American	Multi-Racial	Latinx	Other	Asian	Middle Eastern	Total
Total Answered	14	14	1	2	4	0	0	**35**
Percent of Total	40%	40%	3%	6%	11%	0%	0%	**100%**

Sex	Male	Female	Other/Decline to State	Total
Total Answered	22	9	4	**35**
Percent of Total	63%	26%	11%	**100%**

Age	18-25	26-35	36-45	46-55	56-65	66+	Total
Total Answered	1	10	17	2	1	0	**31**
Percent of Total	3%	32%	55%	6%	3%	0%	**100%**

Employment Status	Regular Worker	Temporary Workers	Total
Total Answered	35	3	**38**
Percent of Total	92.8%	8%	**100%**

Job Description	Assembler	Quality Control	HR	Engineer	Management	All Other	Total
Total Answered	4	6	6	4	4	18	**42**
Percent of Total	10%	14%	14%	10%	4%	43%	**100%**

Place of Birth	Alabama	Mississippi	Other US State	Outside the US	Total
Total Answered	0	24	4	3	**31**
Percent of Total	0%	77%	13%	10%	**100%**

DIMENSION 1: PAY & BENEFITS

Do Continental Tire respondents report earning a living wage? Respondents from Continental Tire reported an average hourly wage of $23.79 which is $2.67 below the estimated amount needed to sustain a family of three.[12] Workers who identified their primary job as Maintenance reported the highest average wage with $38.60 per hour. Forklift operators and Assemblers reported the lowest average wages, $13.00 and $14.67, respectively.

This spread continued when comparing reported wages by race and gender. White Continental Tire respondents reported an average wage of $26.98 compared to just $16.39 for Black respondents. This is a racial wage gap of $10.59 per hour - by far the highest among the case studies. Even when removing the outlier of the highest reported wages among these White Continental workers, the gap is only reduced to $6.87 per hour, still the highest among the case studies. Female workers reported higher average wages than males at Continental Tire. Women reported $22.33 per hour compared to $19.85 for men. This is a $2.48 wage gap that favors women.

Do Continental Tire respondents report receiving basic benefits like health insurance? All of the respondents working at Continental Tire were offered health insurance from their employer. All but three are currently receiving health insurance from Continental. When asked to evaluate the cost and quality of their employer provided health plan, responses were mixed. Some reported it was “average” or “fair.” While others were more positive in their assessment with statements such as “competitive automotive industry benefits”, and “Good the cost is not too much.”

[12] As discussed previously in the report, in 2019 Alabama/Mississippi workers needed to earn $26.46 an hour to support a family of three (2019 is the year data collection commenced) (Glasmeier, 2020).

DIMENSION 2: TERMS OF EMPLOYMENT

Does Continental Tire provide direct employment? Eight percent of Continental Tire respondents are temporary workers - paid by a staffing agency but assigned to work at Continental. The remaining 92 percent are direct hires employed by the Continental Tire company.

Do Continental Tire respondents report opportunities for career advancement? Over half (57%) of all respondents reported agreeing or strongly agreeing with the statement that "my opportunities for advancement are high." While workers reported similar levels of agreement regardless of their gender, differences are noticeable when comparing responses by race. Nearly two out of three (63%) White workers agreed that their opportunities for advancement are high compared to just one in three (33%) of Black workers. Male and female respondents reported similar levels of optimism for advancement and promotion at Continental Tire (53% and 60% respectively).

DIMENSION 3: WORK LIFE BALANCE

Do Continental Tire respondents report a reasonable number of working hours? Half of Continental respondents reported working over 40 hours per week at their job — with 41 percent working 41- 50 hours. Nine percent reported working more than 50 hours per week and just 6 percent worked fewer than 40 hours a week. Sixty-two percent of Black respondents reported working 40 hours per week. White males were more likely to report working more than 40 hours per week. In total, among all respondents 85 percent reported working between 40 and 50 hours in a week.

Do Continental Tire respondents report having predictable work schedules? A majority of respondents from Continental Tire (51%) report having work schedules that are variable. Thirty-eight percent reported that their schedules change from week to week and another 13 percent reporting that their schedules change "once in a while."

The other 47 percent of respondents reported having a stable schedule that is the same week to week. Maintenance and Quality Control workers reported the most variable schedules and Black respondents were more likely to have a variable schedule than White respondents (46% and 33% respectively).

DIMENSION 4: HEALTH AND SAFETY

Do Continental Tire respondents report protection from workplace injury? Eight percent of Continental Tire respondents reported noticing assembly and manufacturing practices that put workers at risk. No respondents reported being seriously injured while at work.

Do Continental Tire respondents report equality of access and treatment regardless of race or gender? Three-quarters of Continental Tire respondents reported that racial discrimination is not a problem at their worksite. None of the White respondents reported racial discrimination as a problem at their site. Black workers at Continental Tire reported different experiences as 54 percent reported that discrimination was a problem — 36 percent said that racial discrimination was a small problem and another 18 percent reported that it was a big problem.

The three most commonly reported experiences of racial discrimination among Black survey respondents at Continental Tire were:

- Treated as less competent because of your race
- Received less support from senior leaders than a person of a different race who was doing the same job
- Earned less than someone of a different race who was doing the same job

No respondents from Continental Tire reported that sexual harassment was a problem at the workplace.

DIMENSION 5: REPRESENTATION & VOICE

Do Continental Tire respondents report the ability to file complaints and speak up at work? Two respondents working at Continental Tire have reported a problem with working conditions — either to their supervisors or an outside agency (e.g., OSHA). Four workers responded that they had issues that were worthy of a complaint, but they chose not to voice their concerns. All four reported that the reasons for not filing a complaint was they "didn't think it would make a difference."

DIMENSION 6: INTRINSIC CHARACTERISTICS

Do Continental Tire respondents express a sense of pride derived from their work? Across the board workers at Continental Tire who responded to the survey expressed pride in working for their employer. Eighty-one percent agreed or strongly agreed that they are proud to work at Continental. Males were slightly more likely than females to agree, but both reported high rates (85% and 80% respectively). Eighty-eight percent of White respondents agreed or strongly agreed with the statement of pride compared to 67 percent of Blacks.

SUMMARY

When analyzing the respondents' answers across the job quality dimensions, the most troubling dimension was wages. While the average pay of respondents was close to the living wage for a family of three standard, there was a very large $10.59 per hour pay gap between White and Black respondents.

COOPER TUPELO, MISSISSIPPI

Founded in Akron, Ohio in 1914, Cooper Tire was one of the 15 largest tire companies in the world, and the fifth largest in the United States when it was purchased by its largest U.S. competitor, Goodyear in 2021 (Carlogos.org, 2020; Cooper, 2022). Globally, prior to the transaction, Cooper Tire employed nearly 10,000 workers and operated 10 manufacturing facilities across 7 countries, producing passenger and light use truck tires. In the United States, Cooper Tire operates manufacturing facilities in four cities - Texarkana, AR; Findley, OH; Clarksdale and Tupelo, Mississippi.

Goodyear Tire & Rubber Company announced it was purchasing Cooper in February 2021 and the transaction was finalized in June 2021. At the time of the transaction, Goodyear was the fourth largest tire manufacturer in the world. Goodyear now employs 72,000 workers and manufactures tires at 57 facilities in 23 countries and has annual sales of $169 billion (The Goodyear Tire & Rubber Company, 2022). The Tupelo Cooper Tire manufacturing facility, located at 1689 South Green Street Tupelo, MS 38802, employs approximately 1,500 people and since the facility opened in 1984 (at the time owned by Penn Tire), it is estimated that the plant has produced 400 million tires (Seid, 2020).

In 2008, Cooper Tire announced it was closing one of its four U.S. facilities prompting the State of Mississippi to pass a $19 million incentive package to keep and expand the facility. The expansion was reported to add 50 to 150 jobs to the existing workforce of 1,200. With additional local subsidies, the total amount of incentives offered to Cooper was more than $30 million (Area Development News Desk, 2009).

Famous as the birthplace of Elvis Presley, Tupelo is in the rolling hills of northern Mississippi and just a couple hours south of Memphis, Tennessee. With a working age population of under 29,114, Tupelo has an outsized presence in Lee County, making up nearly half of the over 16 population in 2019. Tupelo's racial makeup mirrored that of the state of Mississippi — 60 percent White and 36 percent Black. Table 11 provides a demographic overview of Tupelo and the region.

TABLE 13

Demographic Overview of Tupelo and Lee County

	Tupelo	Lee County	Mississippi	Federal
Total Population (over 16)	29,114	65,856	2,354,101	259,662,880
Median Household Income	$50,694	$50,559	$45,081	$65,712
Tupelo as a % of		100.27%	112.45%	77.15%
Unemployment Rate	5.3%	5.8%	7.5%	5.3%
Percent in Poverty	15.6%	14.6%	20.3%	13.4%
Percent employed in manufacturing	21.0%	21.6%	13.4%	10.1%
White/Caucasian	60.0%	69.3%	60.2%	73.9%
Black/African American	36.7%	27.8%	36.5%	12.4%
Asian	0.8%	1.0%	1.0%	5.7%
American Indian and Alaska Native	0.3%	0.3%	0.5%	0.8%
Other	1.8%	1.0%	0.9%	4.6%
Two or more races	0.4%	0.7%	0.9%	2.4%
Latinx/Hispanic*	3.3%	2.1%	2.6%	16.2%

*can represent multiple categories above therefore categories add up to more than 100% | Source: US Census Bureau American Community Survey, 2019

SUMMARY OF RESPONDENTS

To understand the workplace experiences and community impact of such a large-scale industry, we present data from 151 respondents at Cooper Tire's facility in Tupelo, Mississippi. The respondents come from various job classifications, ethnicities, ages, and genders. A summary of the demographic profiles of our Cooper Tire respondents are in Table 12.

TABLE 14

Demographic Overview of Cooper Tire Respondents

Race/Ethnicity	White	African American	Multi-Racial	Latinx	Other	Asian	Middle Eastern	Total
Total Answered	93	15	2	0	5	1	1	**117**
Percent of Total	79%	13%	2%	0%	4%	1%	1%	**100%**

Sex	Male	Female	Other/Decline to State	Total
Total Answered	90	23	4	**117**
Percent of Total	77%	20%	3%	**100%**

Age	18-25	26-35	36-45	46-55	56-65	66+	Total
Total Answered	8	16	23	27	29	3	**106**
Percent of Total	8%	15%	22%	25%	27%	3%	**100%**

Employment Status	Regular Worker	Temporary Workers	Total
Total Answered	109	14	**123**
Percent of Total	89%	11%	**100%**

Job Description	Assembler	Quality Control	Materials Handler	Machinist	Maintenance	All Other	Total
Total Answered	40	11	16	10	10	52	**139**
Percent of Total	10%	14%	14%	10%	4%	43%	**100%**

Place of Birth	Alabama	Mississippi	Other US State	Outside the US	Total
Total Answered	6	78	19	2	**105**
Percent of Total	6%	74%	18%	2%	**100%**

DIMENSION 1: PAY & BENEFITS

Do Cooper Tire respondents report earning a living wage? Respondents from Cooper Tire reported an average hourly wage of $20.99. That represents $5.47 below the needed hourly rate to support a family of three. Quality Control respondents reported higher averages of $22.20 per hour while Assemblers reported $19.65 per hour.

A larger gap in reported wages emerged when comparing responses by race and gender. White respondents at Cooper Tire reported an average wage of $21.72 compared to an average reported wage among Black respondents of $17.60 — a $4.12 per hour wage gap. Males reported an average wage of $3.22 higher than female respondents, with males reporting averages of $21.73 compared to $18.51 for females.

Do Cooper Tire respondents report receiving basic benefits like health insurance? Most respondents working at Cooper Tire report being offered employer sponsored health insurance (96%). Eighty-nine percent had opted into the system and were receiving health insurance from Cooper. When asked to evaluate the cost and quality of their health plans, respondents were largely negative pointing to high costs with limited benefits. For example, “Expensive and doesn’t cover much”, “It’s cost a fortune. It pays some. Basically isn’t worth a shit” and “not worth having for what we pay for.”

DIMENSION 2: TERMS OF EMPLOYMENT

Does Cooper provide direct employment? Eleven percent of Cooper Tire respondents reported being temporary workers employed by a staffing agency but assigned to work at the tire plant. Black respondents at Cooper are nearly three times as likely to report being a temporary employee — 27 percent of Black respondents and 10 percent of White respondents were temporary employees. Women also reported being temporary employees at approximately twice the rate as their male counterparts.

Do Cooper Tire respondents report opportunities for career advancement? The survey asks respondents to either agree or disagree with the statement “my opportunities for advancement are high.” At Cooper Tire, 40 percent of respondents agreed (or strongly agreed) and 45 percent disagreed (or strongly disagreed) with the statement.

Male respondents were much more likely to agree with the statement than females - meaning females respondents had lower expectations for career progression at Cooper Tire. Forty-six percent of males agreed or strongly agreed with the statement about career advancement but just 21 percent of females agreed or strongly agreed — which represents a 25-percentage point gap.

Racial disparities were stark when respondents were asked about their perceived opportunities for advancement at Cooper Tire; 42 percent of White respondents reported that they agree or strongly agree that their opportunities for advancement are high. Only 14 percent of Black workers agreed with the statement; no Black workers strongly agreed with the statement. Instead, 57 percent of Black workers strongly disagreed that their opportunities were high, compared to 22 percent of White workers.

DIMENSION 3: WORK LIFE BALANCE

Do Cooper Tire respondents report a reasonable number of working hours? The majority of respondents reported working between 40 and 50 hours per week at Cooper tire. Eighteen percent worked 40 hours and another 62 percent worked between 41 and 50 hours in a week.

At Cooper Tire, 21 percent of Black respondents worked less than 40 hours a week compared to 3 percent of White respondents. Conversely, 83 percent of White workers worked 40 to 50 hours in a week compared to 64 percent of Black workers.

Do Cooper Tire respondents report having predictable work schedules? A majority of respondents reported work schedules at Cooper Tire that were not consistent — nearly two-thirds (64%) of respondents reported working a variable schedule with over half (51%) reporting their work schedule changes from week to week. Only 36 percent reported having a schedule that was the same every week. Materials Handlers reported the highest variability; 82 percent reported schedules that changed week to week while 63 percent of Assemblers reporting schedules that changed weekly.

Black respondents at Cooper Tire reported more variable schedules than their White colleagues — 64 percent of Black workers reported schedules that change week to week compared to 49 percent of White workers.

DIMENSION 4: HEALTH AND SAFETY

Do Cooper Tire respondents report protection from workplace injury? Thirty-nine percent of respondents reported their product being assembled or manufactured in a way that may put workers at risk. When asked if they witnessed production practices that put workers at risk, 42 percent of White respondents and 31 percent of Black respondents said yes.

These workplace practices are echoed in the number of respondents that reported workplace injuries. Among Cooper Tire respondents, nearly 1 in 3 reported being seriously injured at work (30%). Of those who reported a serious injury, two-thirds reported having been injured more than once while working at Cooper Tire.

White and Black respondents experienced roughly equal rates of serious injury at work 30 and 31 percent, respectively. Maintenance workers reported the highest injury rate (63 percent had been seriously injured at work). Quality Control workers (50%) and Assembler's (33%) had the next highest reported injuries. Males and females reported similar injury rates (30%).

Do Cooper Tire respondents report equality of access and treatment regardless of race or gender? Just over one-quarter (27%) of Cooper Tire respondents reported that racial discrimination is a problem at work (small or big problem).

There is significant variation when comparing results by the race of the respondent. Only 18 percent of White respondents reported racial discrimination as either a big or small problem, while two-thirds (66%) of Black respondents said it was a problem (evenly split between big and small problem).

In addition to asking about racial discrimination in the workplace environment, the survey asked respondents to share specific instances of racially discriminatory actions. Although Black workers only represented 13 percent of the respondents from Cooper Tire, they reported 38 percent of the specific instances of racial discrimination at work. The most common reported experiences of racial discrimination experienced by Black respondents at Cooper Tire were:

- Received less support from senior leaders than a person of a different race who was doing the same job
- Experienced repeated, small slights at work because of your race
- Been passed over for the most important assignments because of your race
- Felt isolated in your workplace because of your race

While Black and White respondents both reported experiencing the above situations at work, Black workers are overrepresented in these responses. Thirty percent of respondents report that sexual harassment is a problem — a majority (55%) of females said it is a problem compared to only 22 percent of males. More than 1 in 5 females (22%) reported that sexual harassment is a big problem.

Of the 69 reported specific incidents instances of sexual harassment (including multiple instances reported by individuals) reported by Cooper Tire respondents, 68 percent were experienced by females, 29 percent by males. The most common experiences of sexual harassment reported by females were:

- Received less support from senior leaders than a person of a different gender who was doing the same job
- Felt uncomfortable at work because of inappropriate sexual jokes or remarks by a supervisor or co-worker
- Had someone treat you as if you were not competent because of your gender

DIMENSION 5: REPRESENTATION & VOICE

Do Cooper Tire respondents report the ability to file complaints and speak up at work?
Health and Safety issues may go unchecked at Cooper Tire due to some workers' fears of retaliation. Ninety percent of respondents reported that they did not feel they could report production safety issues without experiencing retaliation. This is true for respondents from all race and gender groups at Cooper Tire.

More than one fifth (22%) of Cooper Tire respondents reported having filed a complaint about working conditions to either their supervisors or an outside agency in the previous 12 months. The most common reason cited was "increased workloads-made me/us work more" followed by "forced to work overtime."

In addition to the above complaints, 60 percent of all Cooper Tire respondents said that in the past 12 months they had cause to file a complaint but chose not to. When asked to specify why they chose not to file a complaint the most common responses were (workers could select multiple reasons):

- Didn't think it would make a difference
- Afraid of losing your job
- Observed other co-workers disciplined (fired, threatened or treated badly) for speaking up

DIMENSION 6: INTRINSIC CHARACTERISTICS

Do Cooper Tire respondents express a sense of pride derived from their work? Just under half of respondents at Cooper Tire (47%) were proud to be working at their facility. One quarter (26%) disagreed or strongly disagreed that they were proud to work at Cooper Tire. Black workers were more likely to disagree with the statement (43%) than White workers (22%). There was no significant difference observed between respondents of different genders in their levels of pride in working at Cooper Tire.

SUMMARY

Cooper Tire respondents do not paint a good picture of the quality of jobs at their facility. There are sizeable gaps between White and Black respondents in terms of wages, perception of advancement, and predictable work schedules. In addition, the health and safety measures are among the worst of any of the case studies as the fear of reporting issues was the highest — with 90 percent of respondents indicating that they did not feel they could report production safety issues without experiencing retaliation.

GE AVIATION, BATESVILLE, MISSISSIPPI

A subsidiary of General Electric, GE Aviation was founded in 1917 when GE won a military contract to supply the U.S. Federal government with airplanes. In 2021, General Electric announced that it would be splitting up its major business units (Aviation, Healthcare, Renewable Energy and Power) into three separate publicly traded companies in the coming years. In July 2022, GE reported that the healthcare operations would be spun-off into a company called GE HealthCare in 2023, and its portfolio of energy businesses into a company called GE Vernova by 2024. After the spin-offs, the remaining entity will be aviation-focused and named GE Aerospace (GE Aerospace, 2022).

GE had combined sales of $74.1 billion, 168,000 employees worldwide (55,000 in the U.S.) and had 71 manufacturing plants in 26 states and Puerto Rico, plus 130 plants in 33 other countries in 2021 (General Electric Company, 2022). GE Aviation, headquartered in Ohio, accounted for 28.7 percent — $21.3 billion of GE's total revenue and 40,000 employees in 2021.

GE Aviation operates two facilities in Mississippi, one in Batesville that opened in 2008 and another in Ellisville that was announced in 2011 with production beginning in 2013 (GE Aerospace, 2008). Both facilities produce composites and metals fabrication primarily for aircraft engine applications (GE Aerospace, 2011; Sloan, 2016). By 2013, Batesville employed 450 workers and Ellisville was projected to reach 250 employees by 2017. Elected leaders applauded the expansion, saying GE was bringing "hundreds of good, high-paying jobs to working families" (GE Aerospace, 2013).

Despite the addition of these two facilities in Mississippi, GE's overall U.S. employment has declined dramatically since 1989 from 277,000 to 55,000 in 2021. A report released in late 2021 by Cornell University, Boston University, and University of Massachusetts found that GE had received more than $2.2 billion in federal, state, and local subsidies since 1992 (and since 2000 for the federal statistics) all the while reducing its U.S.-based workforce. The report noted that "GE's core industrial businesses rely on government contracts and subsidies and are inextricably intertwined with US industrial policy" (Vesoulis, 2021)

GE's facilities in Mississippi have also received State and local aid; Good Jobs First Subsidy tracker places the figure at $8.8 million since 2010 (Good Jobs First, 2020a). New incentives for the aerospace industry were added to existing programs in 2010 to get aerospace companies to locate or expand in Mississippi (Business Facilities, 2010).

Located in Panola County in northwest Mississippi just south of Memphis, Batesville has a working age population of 5,352 in 2019 accounting for 20 percent of the workforce. Unemployment was lower in Batesville at just 1.3 percent and higher in Panola County at 6.9 percent. Poverty rates were relatively high at 16.7 percent — 3.3 percentage points higher than the national average but on par or lower than Mississippi. Both Panola County and Batesville have higher percentages of Black workers than Mississippi and the United States.

TABLE 15

Demographic Overview of Batesville and Panola County

	Batesville	Panola County	Mississippi	Federal
Total Population (over 16)	5,352	26,504	2,354,101	259,662,880
Median Household Income	$48,175	$38,304	$45,081	$65,712
Batesville as a % of		125.8%	106.9%	73.3%
Unemployment Rate	1.3%	6.9%	7.5%	5.3%
Percent in Poverty	16.7%	20.3%	20.3%	13.4%
Percent employed in manufacturing	13.7%	16.9%	13.4%	10.1%
White/Caucasian	53.0%	51.2%	60.2%	73.9%
Black/African American	42.9%	47.4%	36.5%	12.4%
Asian	0.0%	0.0%	1.0%	5.7%
American Indian and Alaska Native	0.0%	0.2%	0.5%	0.8%
Other	0.0%	0.1%	0.9%	4.6%
Two or more races	4.0%	1.0%	0.9%	2.4%
Latinx/Hispanic*	0.6%	1.8%	2.6%	16.2%

*can represent multiple categories above therefore categories add up to more than 100% | Source: US Census Bureau, American Community Survey, 2019

SUMMARY OF RESPONDENTS

To understand workplace experiences and job quality within aviation and related industries, we present data from 47 workers at the GE Aviation facility in Batesville. Respondents come from various job classifications, ethnicities, ages, and gender. A summary of demographics of GE responses are in Table 14.

TABLE 16

Demographic Overview of GE Aviation Respondents

Race/Ethnicity	White	African American	Multi-Racial	Latinx	Other	Asian	Middle Eastern	Total
Total Answered	13	17	2	0	2	0	1	**35**
Percent of Total	37%	49%	6%	0%	6%	0%	3%	**100%**

Sex	Male	Female	Other/Decline to State	Total
Total Answered	19	12	4	**35**
Percent of Total	54%	34%	11%	**100%**

Age	18-25	26-35	36-45	46-55	56-65	66+	Total
Total Answered	8	16	23	27	29	3	**106**
Percent of Total	8%	15%	22%	25%	27%	3%	**100%**

Employment Status	Regular Worker	Temporary Workers	Total
Total Answered	34	2	**36**
Percent of Total	94%	6%	**100%**

Job Description	Assembler	Quality Control	Maintenance	All Other	Total
Total Answered	40	4	4	13	**43**
Percent of Total	51%	9%	9%	30%	**100%**

Place of Birth	Alabama	Mississippi	Other US State	Outside the US	Total
Total Answered	4	23	3	0	**105**
Percent of Total	13%	77%	10%	0%	**100%**

DIMENSION 1: PAY & BENEFITS

Do GE Aviation respondents report earning a living wage? Respondents from the GE facilities reported an average hourly wage of $21.59, nearly $5 per hour below the $26.46 per hour threshold for livability for a family of three. Quality Control workers reported the highest wages, $28.67 an hour. Assemblers reported some of the lowest average wages at $19.73 per hour. Black respondents at the GE facilities reported higher average wages than their White counterparts. Black respondents averaged $20.41 an hour and White workers reported $19.76 an hour - a gap of $0.65. A gender wage gap was higher, with males earning $1.85 more per hour on average than females ($22.63 and $20.78, respectively).

Do GE Aviation respondents report receiving basic benefits like health insurance? Most respondents at GE Aviation had been offered health insurance through their employer (94%). Of those offered insurance, 90 percent reported currently receiving health insurance from GE Aviation. When asked to describe the quality and cost of their employer sponsored health plan, most

responses were either neutral or negative - only one worker reported the health insurance was "good"; others reported that it was "financially unrealistic", and "gets worse every year. Increase in price with less coverage."

DIMENSION 2: TERMS OF EMPLOYMENT

Does GE provide direct employment? Nearly all of the respondents from GE Aviation are on permanent contracts. Only 5 percent reported being on a temporary contract or hired by a staffing agency and assigned to work at GE Aviation.

Do GE Aviation respondents report opportunities for career advancement? Most GE respondents are pessimistic about their opportunities for advancement at their current job. Nearly three-quarters (73%) reported that they either disagree or strongly disagree that their opportunities for advancement are high. White males were most pessimistic about their future at GE. Seventy-five percent of males and 100 percent of White respondents reported that they disagree or strongly disagree with the statement that their opportunities for advancement are high. Meanwhile 67 percent of females and 33 percent of Black workers disagreed with the statement.

DIMENSION 3: WORK LIFE BALANCE

Do GE Aviation respondents report a reasonable number of working hours? Half of all respondents reported a 40-hour work week; another third reported working between 40 and 50 hours a week. Sixteen percent worked more than 50 hours in a week. Black workers were much more likely to report working 40 hours a week (77%) compared to White workers (33%). Nearly a quarter (25%) of White GE respondents reported working more than 50 hours in a week. Female respondents are less likely to work shifts that go beyond the 40 hour per week standard. Only 27 percent of female workers work 41 or more hours in a week compared to 75 percent of males.

Do GE Aviation respondents report having predictable work schedules? While nearly two-thirds of respondents reported having the same work schedule week to week (62%), 38 percent reported having a schedule that is subject to change - 17 percent of whom have a schedule that changes week to week. There is no significant difference in schedule changes observed between workers based on race or gender.

DIMENSION 4: HEALTH AND SAFETY

Do GE Aviation respondents report protection from workplace injury? Respondents from the GE facilities reported significant rates of unsafe working conditions. More than 2 in 5 workers (41%) reported noticing production practices that put workers at risk. Workers reported similar risks regardless of their race.

One quarter (25 %) of GE respondents reported being seriously injured at work. Black workers reported a much higher injury rate than White workers (42% and 9% respectively). Women also reported higher injury rates. Half of all female respondents reported being seriously injured at work compared to just one male reporting a serious injury.

Do GE Aviation respondents report equality of access and treatment regardless of race or gender? Eighty-five percent of the respondents indicated that racial discrimination was a problem. Half of all respondents reported that racial discrimination was a big problem, and another 35 percent reported it was a small problem. Somewhat surprisingly, White workers were more likely to report that racial discrimination was a big problem compared to Black workers (70% and 9%, respectively). Thirty-six percent of Black respondents reported that racial discrimination was not a problem at GE. More than half of White respondents at GE reported feeling isolated at work because of their race and reported receiving less support from senior leaders than a person of a different race.

Sixty percent of GE respondents reported that sexual harassment is a problem at GE. Forty-six percent reported that it was a small problem and 17 percent reported it was a big problem. Female workers did report negative experiences related to gender and sexuality — one-third of female workers reported being treated as if they were not competent because of their gender.

DIMENSION 5: REPRESENTATION & VOICE

Do GE Aviation respondents report the ability to file complaints and speak up at work? Fourteen percent of GE respondents reported having filed a formal complaint within the previous 12 months. However, more than half of respondents (57%) reported having reason to file a complaint but choosing not to. When asked for reasons why they chose to not file a complaint the most common answers are:

- Didn't think it would make a difference
- Afraid of losing your job
- Seen other co-workers disciplined (fired, threatened, or treated badly) for speaking up

DIMENSION 6: INTRINSIC CHARACTERISTICS

Do GE Aviation respondents express a sense of pride derived from their work? Despite the above challenges, many respondents were generally proud to work for their employer — 43 percent agree or strongly agree with the statement "I am proud to be working for my current employer." Only 19 percent disagreed with the statement. Female respondents were more likely to express pride in working for GE (56%) compared to male workers (36%). Workers expressed similar rates of pride regardless of race.

SUMMARY

GE respondents indicate that their jobs do not measure well across a number of job quality dimensions. GE respondents had the most pessimistic view (73%) of their ability to advance when compared to other surveyed companies. Discrimination issues (both race and gender) feature prominently with 85 percent of respondents saying race discrimination is a problem and 63 percent saying gender discrimination is a problem — among the highest of all the case studies.

YOKOHAMA TIRE WEST POINT, MISSISSIPPI

Yokohama Tire is the North American arm of the Japanese-based Yokohama Rubber Company that was founded in 1917. Yokohama Rubber has three main business groups: Tires; Alliance Tire Group (ATG); and Multiple Businesses. Tires is the largest group accounting for 70 percent of sales and 70 percent of the total number of employees (19,031) (The Yokohama Rubber Co. LTD, 2021).

Yokohama is the 8th largest tire company in the world with sixteen tire manufacturing plants in eight countries (Carlogos.org, 2020). Yokohama established Yokohama Tire in 1969 with a research and development center in Cornelius, North Carolina and manufacturing plant in Salem, Virginia. In 2015, Yokohama opened a facility in West Point, Mississippi, operating as the Yokohama Tire Manufacturing Mississippi. Yokohama Tire employs 2,100 workers across all three locations with just over 700 employees at the West Point facility (Yokohama Tire, N.D.).

In 2013, the State of Mississippi, county and city agencies approved a package that could provide as much as $330 million to Yokohama to build the facility in Clay County (Amy, 2013). In the initial phase, Yokohama would hire 500 workers to make truck and bus tires to produce up to 1 million tires a year. Three additional phases were discussed which would bring total employment to 2,000 workers if the business grew sufficiently to warrant the extra capacity.

A Columbus Dispatch article from 2019 reported that the company and local economic development authorities traded accusations about Yokohama's failure to meet production targets in West Point. The company blamed production shortfalls on the workforce, citing turnover and education, while local economic developers were "pointing the finger back at the company" (Pollitz, 2019). That report came when Yokohama stated it produced 500,000 tires in 2018 while employing 660 workers. Yokohama scaled back its production estimates in 2019 and set projected output in 2021 to 843,000 tires (Davis, 2019). In its most recent annual report for the year 2021, Yokohama doesn't provide production numbers but does state that it is working to secure stable supply from its Mississippi plant while investing further to boost capacity (The Yokohama Rubber Co. LTD, 2021).

In 2019, West Point and Clay County had relatively small working age populations and high unemployment rates of 11.1 percent and 10.3 percent and high rates of poverty — 30.6 percent and 25.5 percent respectively. West Point and Clay County had a majority Black workforce in 2019 and both had significantly more workers in manufacturing industries than the state of Mississippi.

TABLE 17

Demographic Overview of West Point and Clay County

	West Point	Clay County	Mississippi	Federal
Total Population (over 16)	8,480	15,797	2,354,101	259,662,880
Median Household Income	$30,664	$31,833	$45,081	$65,712
West Point as a % of		96.3%	68.0%	46.7%
Unemployment Rate	11.1%	10.3%	7.5%	5.3%
Percent in Poverty	30.6%	25.5%	20.3%	13.4%
Percent employed in manufacturing	26.8%	28.0%	13.4%	10.1%
White/Caucasian	38.7%	41.0%	60.2%	73.9%
Black/African American	60.7%	57.8%	36.5%	12.4%
Asian	0.6%	0.3%	1.0%	5.7%
American Indian and Alaska Native	0.0%	0.5%	0.5%	0.8%
Other	0.0%	0.0%	0.9%	4.6%
Two or more races	0.0%	0.4%	0.9%	2.4%
Latinx/Hispanic*	0.0%	0.1%	2.6%	16.2%

*can represent multiple categories above therefore categories add up to more than 100% | Source: US Census Bureau American Community Survey, 2019

SUMMARY OF RESPONDENTS

To better understand the impact of local investments on individuals and communities, we present data from 69 respondents who work at Yokohama Tire in West Point, Mississippi. These respondents come from various job classifications, ethnicities, ages, and genders. A summer of the demographic profiles of Yokohama Tire respondents is in Table 16.

TABLE 18

Demographic Overview of Yokohama Tire Respondents

Race/Ethnicity	White	African American	Multi-Racial	Latinx	Other	Asian	Middle Eastern	Total
Total Answered	19	24	2	0	2	0	0	**47**
Percent of Total	40%	51%	4%	0%	4%	0%	0%	**100%**

Sex	Male	Female	Other/Decline to State	Total
Total Answered	31	14	3	**48**
Percent of Total	65%	29%	6%	**100%**

Age	18-25	26-35	36-45	46-55	56-65	66+	Total
Total Answered	6	9	14	10	5	0	**44**
Percent of Total	14%	20%	32%	23%	11%	0%	**100%**

Employment Status	Regular Worker	Temporary Workers	Total
Total Answered	49	5	**54**
Percent of Total	91%	9%	**100%**

Job Description	Assembler	Quality Control	Fork Lift Op	Machinist	Management	All Other	Total
Total Answered	17	6	5	5	5	26	**64**
Percent of Total	27%	9%	8%	8%	4%	41%	**100%**

Place of Birth	Alabama	Mississippi	Other US State	Outside the US	Total
Total Answered	0	33	7	0	**40**
Percent of Total	0%	83%	18%	0%	**100%**

DIMENSION 1: PAY & BENEFITS

Do Yokohama respondents report earning a living wage? Respondents from Yokohama Tire reported an average hourly wage of $17.02, which is the lowest among all the case studies in this report and $9.44 below the suggested standard of living for a family of three.

Although average reported wages are lower across the board at Yokohama, compared to other firms in this study the race and gender wage gaps are small or nonexistent. Black and White respondents at Yokohama reported the same average wage of $17.20 per hour. Males reported earning $17.55 an hour compared to $16.43 an hour for females, a gender wage gap of $1.12.

Do Yokohama respondents report receiving basic benefits like health insurance? A majority of respondents (89%) from Yokohama reported having been offered health insurance from their employer. Ninety-one percent of respondents reported that they received health insurance from Yokohama. When asked to assess the cost and quality of their employer sponsored health insurance plan, respondents shared opinions that were largely either neutral or positive. These include the following: “decent”, “expensive but good coverage”, and “it’s okay.”

DIMENSION 2: TERMS OF EMPLOYMENT

Does Yokohama provide direct employment? Most respondents (91%) from Yokohama reported being permanent employees and 9 percent reported that they are temporary workers.

Do Yokohama respondents report opportunities for career advancement? A majority of respondents (52%) disagree with the statement that their opportunities for advancement are high. Black and female respondents were far more likely to be pessimistic about their future at the Yokohama facility — 55 percent of Black and more than two-thirds (67%) of female respondents reported that they disagreed or strongly disagreed that their opportunities for advancement were

high. Twenty-eight percent of respondents strongly agreed with the statement indicating a portion of the workforce does feel like they have an ability to advance their careers. Black respondents at Yokohama were less optimistic than White respondents. Only 33 percent of Black respondents reported that they agree or strongly agree that their opportunities for advancement at Yokohama are high. Half (50%) of White respondents agreed or strongly agreed.

DIMENSION 3: WORK LIFE BALANCE

Do Yokohama respondents report a reasonable number of working hours? Nearly all (95%) of all respondents reported working 40 or more hours per week. Three quarters (76%) work between 40 and 50 hours in a week and 1 in 5 reported (20%) working more than 50 hours a week. Assemblers and Quality Control workers reported the highest rate of working more than 50 hours in a week (50% and 25% respectively).

Black respondents at Yokohama are more likely to put in more than 50 hours in a week than their White counterparts. Twenty-two percent of Black workers worked between 50 and 60 hours a week and an additional 11 percent worked more than 60 hours in a week.

Do Yokohama respondents report having predictable work schedules? Seventy-three percent of respondents reported variable work schedules. One third reported that their schedule changed week to week and 40 percent reported it changing once in a while. White respondents at Yokohama were more likely to report having a steady work schedule - 39 percent compared to 11 percent of Black respondents.

DIMENSION 4: HEALTH AND SAFETY

Do Yokohama respondents report protection from workplace injury? Eighteen percent (18%) of the respondents reported their product being assembled or manufactured in a way that may put workers at risk. Black and White workers reported similar levels of risky behaviors observed in the workplace.

Nine percent of Yokohama Tire respondents reported being seriously injured at work. Black workers reported higher rates of injury (14%) than White workers (6%).

Do Yokohama respondents report equality of access and treatment regardless of race or gender? About half (48%) of the respondents at Yokohama Tire reported that racial discrimination was a problem at their workplace — workers were evenly split between racial discrimination being a big or small problem (24% each). These rates hold when comparing responses by race - about 50 percent say it was not a problem, and 25 percent each report that it was a small or big problem.

The survey presents a number of examples of discriminatory treatments and practices that can occur in the workplace. Of these categories, White respondents at Yokohama reported the majority of instances of discriminatory practices. White respondents at Yokohama reported that they:

- Felt isolated in your workplace because of your race
- Experienced overt remarks, slurs, or derogatory language because of your race
- Experienced repeated, small slights at work because of your race

Thirty-nine percent of Yokohama respondents reported that sexual harassment was a problem at work with almost one in four (24%) indicating it was a big problem and another 15 percent reported it was a small problem. Among female respondents at Yokohama Tire, 45 percent reported sexual harassment as a big problem.

Of the 44 reported incidences or experiences of sexual harassment or unfair treatment, 27 of them came from female respondents. The most common experiences of gender based unequal treatment for female respondents at Yokohama Tire were:

- Experienced repeated, small slights at work because of your gender
- Felt uncomfortable at work because of inappropriate sexual jokes or remarks by a supervisor or co-worker

Male respondents reported 17 instances of unfair treatment due to gender or sex. The most common experiences for male respondents at Yokohama Tire was feeling they have "been passed over for the most important assignments because of your gender."

DIMENSION 5: REPRESENTATION & VOICE

Do Yokohama respondents report the ability to file complaints and speak up at work? Fifteen percent of Yokohama respondents reported that they had filed a complaint in the previous 12 months to address working conditions (complaints filed with managers or outside agencies). In addition to those complaints, one in five Yokohama respondents reported that although they had reason to file a complaint in the past 12 months, they chose not to. Reasons for opting to suppress a complaint include:

- Observed other co-workers disciplined (fired, threatened, or treated badly) for speaking up
- Afraid of losing your job
- Didn't think it would make a difference

DIMENSION 6: INTRINSIC CHARACTERISTICS

Do Yokohama respondents express a sense of pride derived from their work? In spite of the above challenges, many workers at Yokohama were proud to work for the company. Fifty-six percent of respondents agreed or strongly agreed with the statement "I am proud to be working for my current employer." Some disparities in these sentiments emerge when looking at responses by race and gender — 20 percent of male and 11 percent of female respondents strongly disagreed that they were proud to work at Yokohama.

Black respondents were less likely to be proud of working at Yokohama — 44 percent of Black respondents either disagreed or strongly disagreed that they are proud to work for Yokohama compared to 21 percent of White respondents.

SUMMARY

Based on the perspective of the survey respondents, the jobs at Yokohama do not measure well against the others in the case study and fall short in a number of the job quality dimensions. With a reported wage rate of $17.02 among respondents, Yokohama was by far the lowest among the case studies and well below the livable wage for a family of three. Reports of discrimination issues (both race and gender) featured among Yokohama respondents, with 48 percent saying that race discrimination was a problem and 45 percent of females saying gender discrimination was a big problem. In addition, a majority of Yokohama respondents had a pessimistic view about their ability to advance at the company.

MERCEDES: VANCE, ALABAMA

Workers from the Mercedes manufacturing facility in Vance, Alabama participated in the survey. Mercedes-Benz Group is the third largest car company in the world based in Stuttgart, Germany, and is also one of the largest global corporations, ranking 24th on the Fortune Global 500 with annual revenue of $175.8 billion (Carlogos.org, 2022; Fortune Magazine, 2022). Mercedes produces vehicles in 17 countries and has 172,425 employees worldwide (Mercedes-Benz Group, 2022b).

In 1993, Mercedes-Benz Group announced the opening of a U.S. production facility in Tuscaloosa County Alabama to operate under the name Mercedes Benz U.S. International (MBUSI 2022). In 1997, the first M-class luxury sports utility vehicles began rolling off the production line at the facility in the city of Vance. Since then, the facility has undergone multiple expansions to meet growing demand for luxury vehicles. To recruit and retain Mercedes to the Vance location, state and local public agencies have provided nearly half a billion dollars in subsidies (Good Jobs First, N.D.).

The facility now produces more than 300,000 cars annually with a workforce of 4,400 (Mercedes-Benz Group, 2022a). The facility is more than 6 million square feet on a campus that is close to 1,000 acres just east of Interstate 20/58 in the small community of Vance, just east of the city of Tuscaloosa in Tuscaloosa County.

The town of Vance was home to just 1,116 working age residents in 2019 - a portion that pales in comparison to the number of workers in the Mercedes facility. Tuscaloosa County had a working age population of 168,197.

TABLE 19

Demographic Overview of Vance and Tuscaloosa County

	Vance	Tuscaloosa County	Alabama	Federal
Total Population (over 16)	1,116	168,197	3,907,144	259,662,880
Median Household Income	$72,031	$53,326	$50,536	$65,712
Vance as a % of		135.1%	142.5%	109.6%
Unemployment Rate	2.0%	5.8%	5.9%	5.3%
Percent in Poverty	10.0%	17.7%	16.7%	13.4%
Percent employed in manufacturing	18.7%	14.6%	14.3%	10.1%
White/Caucasian	90.9%	66.0%	69.6%	73.9%
Black/African American	8.2%	30.6%	26.0%	12.4%
Asian	0.0%	1.5%	1.3%	5.7%
American Indian and Alaska Native	0.0%	0.2%	0.5%	0.8%
Other	0.6%	0.6%	1.1%	4.6%
Two or more races	0.2%	1.0%	1.4%	2.4%
Latinx/Hispanic*	1.3%	3.0%	3.4%	16.2%

*can represent multiple categories above therefore categories add up to more than 100% | Source: US Census Bureau American Community Survey, 2019

The town of Vance and the County of Tuscaloosa have lower unemployment and poverty rates than the state average. The town of Vance had low rates of unemployment (2%) and poverty (10%) in 2019. The county of Tuscaloosa had a marginally higher unemployment rate of 5.8 percent and 17.7 percent of the population lived below the poverty line.

In 2019, Vance's percentage of workers in manufacturing was 18.7 percent, which is four percentage points higher than the County and State. Over 90 percent of the working age population in Vance was White (91%) compared to Tuscaloosa County (66%).

To understand workplace experiences for those inside this facility, we present data from 211 workers at the Mercedes plant. These workers come from a diversity of backgrounds and job classifications:

TABLE 20

Demographic Overview of Mercedes Respondents

Race/Ethnicity	White	African American	Multi-Racial	Latinx	Other	Asian	Middle Eastern	Total
Total Answered	107	50	2	2	4	0	0	**165**
Percent of Total	65%	30%	1%	1%	2%	0%	0%	**100%**

Sex	Male	Female	Other/Decline to State	Total
Total Answered	109	53	8	**170**
Percent of Total	64%	31%	5%	**100%**

Age	18-25	26-35	36-45	46-55	56-65	66+	Total
Total Answered	16	43	42	39	24	24	**188**
Percent of Total	9%	23%	22%	21%	13%	13%	**100%**

Employment Status	Regular Worker	Temporary Workers	Total
Total Answered	150	36	**186**
Percent of Total	81%	19%	**100%**

Job Description	Assembler	Quality Control	Maintenance	Engineer	Electrical Tech	All Other	Total
Total Answered	66	25	17	16	13	59	**196**
Percent of Total	34%	13%	9%	8%	7%	30%	**100%**

Place of Birth	Alabama	Mississippi	Other US State	Outside the US	Total
Total Answered	74	4	34	6	**118**
Percent of Total	63%	3%	29%	5%	**100%**

DIMENSION 1: PAY & BENEFITS

Do Mercedes respondents report earning a living wage? Respondents from Mercedes reported a relatively high average wage of $26.91 an hour which is $.45 above the pay level to support a family of 3 — the only facility to eclipse that threshold among the case studies. Some of the highest paid positions among Mercedes respondents were Engineer ($34.98), Maintenance ($31.47) and Electrical Technician ($29.19). The lowest paid positions among respondents were Assemblers ($24.37).

White respondents at Mercedes reported higher average wages than Black respondents. The average for White respondents was $26.13, and the average for Black respondents was $23.15. This is a gap of $2.99 an hour. On average, male respondents earned considerably more than females at the Mercedes plant. Male averages were $28.86 compared to $23.19 for females, a gender gap of $5.67 an hour.

Do Mercedes respondents report receiving basic benefits like health insurance? Ninety-seven percent of Mercedes respondents reported having been offered health insurance from their employer and 87 percent received health insurance from Mercedes. When asked to describe the cost and quality of their employee sponsored health insurance, opinions ranged from negative statements like “too high and not a well known name” and “low cost, terrible quality” to more neutral statements such as “fair/normal.” A couple of workers reported that they have seen the quality of their health insurance decline over time while costs are increasing, saying it “keeps going up year after year and I get less coverage” and “the quality of our benefits continues to decline year after year.”

DIMENSION 2: TERMS OF EMPLOYMENT

Does Mercedes provide direct employment? Nearly one in five (19%) respondents who work at Mercedes are temporary or contract workers. These are workers who are paid by a staffing agency but assigned to work at Mercedes.

Do Mercedes respondents report opportunities for career advancement? Only one-quarter (26%) of Mercedes respondents believed their opportunities for advancement at the facility are “high.” Black respondents at Mercedes were more optimistic about their future in the plant. Forty percent agreed or strongly agreed with the statement that their “opportunities for advancement are high” compared to 21 percent of White respondents.

DIMENSION 3: WORK LIFE BALANCE

Do Mercedes respondents report a reasonable number of working hours? As with many other facilities in this study, respondents at Mercedes work long shifts. Of the respondents to this survey, 45 percent reported working more than 50 hours per week. Another 36 percent reported working between 41 and 50 hours per week — meaning 81 percent of respondents worked more than 40 hours per week, one of the highest percentages of the case studies.

Maintenance workers reported the most hours worked - with 71 percent of them working more than 50 hours in a week. Forty-three percent of Assemblers and 32 percent of Quality Controllers worked more than 50 hours in a week. However, 43 percent of Engineers reported working 40 hours per week.

Do Mercedes respondents report having predictable work schedules? Two-thirds (67%) of all Mercedes respondents reported having a variable work schedule, and almost half (49%) had a schedule that changed from week to week. When schedules changed, many respondents were provided little advance warning. Nearly a third (29%) were given only a few hours advance notice of a change to their work schedule. Another third (33%) were given 2-4 days' notice of change.

White respondents at Mercedes were more likely to have a schedule that changed from week to week (55%) compared to their non-White counterparts (36%).

Female respondents reported the most stability in their schedule with 44 percent having the same schedule every week. However, for those female respondents whose schedule did change, 40 percent were only given a few hours advance notice.

DIMENSION 4: HEALTH AND SAFETY

Do Mercedes respondents report protection from workplace injury? Production safety can impact workers. Among Mercedes respondents, more than one third (35%) reported practices that may put workers at risk. White workers reported witnessing such practices at a higher rate (38%) than Black workers (23%).

This is underscored in the data on reported workplace injuries. Roughly 1 in 4 (24%) of Mercedes respondents report having been seriously injured at work. Of the workers reporting being injured at work, 38 percent report having been seriously injured more than once.

Injury rates among different racial groups are similar to the overall workplace averages among respondents. Twenty-eight percent of White respondents and 21 percent of Black respondents reported being seriously injured while working at Mercedes. Male and female workers also reported similar injury rates (26% and 23%, respectively).

Among the most common job classifications, Electrical Technicians respondents had the highest injury rate - one third reported being seriously injured (33%). Twenty-nine percent of Quality Control respondents reported a serious injury followed by maintenance respondents (20%).

Do Mercedes respondents report equality of access and treatment regardless of race or gender? To gauge the overall workplace environment related to racial and gender equity, the survey asks respondents if racial discrimination and sexual harassment are problems at their

workplace. Among Mercedes respondents, 48 percent reported that racial discrimination was a problem — 15 percent indicated it was a "big" problem and 33 percent report it was a "small" problem. Figures are roughly the same for sexual harassment.

Fourteen percent of White respondents and 17 percent of Black respondents reported that racial discrimination is a big problem at Mercedes. When presented with a list of common workplace experiences that are discriminatory based on race, White Mercedes workers reported the majority of discriminatory experiences (61%).

Seventeen percent of all White worker survey respondents reported that they "received less support from senior leaders than a person of a different race who was doing the same job." Twelve percent reported feeling "isolated in [their] workplace because of [their] race." White workers reporting discrimination was also seen in the open-ended comments where respondents reported "Blacks get away with more than White people do at Mercedes!" and, that they "could not get help from my Black female group leader because of my color and she doesn't like White people." Among Black respondents, the most common experience was being "passed over for the most important assignments because of your race" (14%).

Forty-three percent of Mercedes respondents report that sexual harassment was a problem with 15 percent saying it was a "big" problem and 28 percent report it was a "small" problem. Female respondents were more likely to report sexual harassment as a "big" problem compared to male respondents (23% and 12%, respectively).

One in five (20%) of all female respondents at Mercedes reported that they have "felt uncomfortable at work because of inappropriate sexual jokes or remarks by a supervisor or co-worker." Fifteen percent (15%) of female respondents reported they "had someone treat you as if you were not competent because of your gender."

DIMENSION 5: REPRESENTATION & VOICE

Do Mercedes respondents report the ability to file complaints and speak up at work? The relatively high reported injury rates among respondents discussed above may be a result of workers feeling unable to report unsafe practices when they arise. When asked if they could report safety issues without fear of retaliation 73 percent of Mercedes respondents answered "No", meaning only about a quarter of respondents felt they could report issues and not experience retaliation (measure unmet). One worker wrote in the following response, "Mercedes doesn't care about safety. They care about pushing cars out."

Twenty-eight percent of Mercedes respondents reported that they had filed a complaint about working conditions in the previous 12 months. When asked what the complaint was about, the most common responses were:

- Increased workloads - made me/us work more
- Forced to work overtime
- Bad schedule/shift
- Needed a raise/pay is too low

On top of those complaints filed, 59 percent of Mercedes respondents reported having problems at work but did not complain. Reasons for not filing a complaint with either a manager or an outside agency included:

- Didn't think it would make a difference
- Afraid of losing your job
- Observed other co-workers disciplined (fired, threatened or treated badly) for speaking up
- Did not know who to talk to or where to take the complaint

DIMENSION 6: INTRINSIC CHARACTERISTICS

Do Mercedes respondents express a sense of pride derived from their work?

Many respondents reported that they were proud to work for Mercedes. Forty-two percent agreed or strongly agreed with the statement "I am proud to be working for my current employer." Nearly 1 out of 4 workers (23%) disagreed with that statement and fully one-third (33%) neither agreed or disagreed. More than half (57%) of Black respondents were proud to work for Mercedes compared to 40 percent of White respondents.

SUMMARY

Despite representing the highest reported average wage among all the case studies, and the only one to exceed the living wage threshold for a family of three, Mercedes respondents report a number of issues that indicate poor job quality. Most notable are reports of long and unpredictable work hours, unsafe working conditions, and a nearly $3 per hour reported wage gap based on race and $5.67 pay gap based on gender. More than 4 out of 10 respondents thought that race and gender discrimination was a problem, and a few (just over a quarter) felt like they could speak out about issues without being disciplined. Mercedes demonstrates that there is more to job quality than pay.

NORTH AMERICAN LIGHTING MUSCLE SHOALS, ALABAMA

North American Lighting (NAL) is an automotive parts producer specializing in lighting systems. NAL is owned by Koito Manufacturing Co, a $5.5 billion Tokyo, Japan based automotive lighting supplier that first established operations in the United States in 1983. In addition to manufacturing operations in Japan and North America, Koito has operations in South America, Europe, Middle East, China and Southeast Asia.

North American Lighting operates facilities in five states, employing nearly 6,000 workers. At its production facility located in Muscle Shoals, Alabama, North American Lighting employs approximately 1,300 workers (North American Lighting, 2022). It first opened the facility in 2007 and expanded it in 2011 and 2013 (Area Development News Desk, 2013).

Muscle Shoals is most famous for producing American classic musical hits. The Muscle Shoals Sound Studio was a destination recording studio for the likes of Willie Nelson and Aretha Franklin and remains a destination for major recording artists. Located in the northwest corner of Alabama, Muscle Shoals had an early brush with manufacturing in the 1920s. Henry Ford visited and declared that he would transform the area into a metropolis and "employ one million workers at Muscle Shoals and I will build a city 75 miles long at Muscle Shoals" (City of Muscle Shoals, 2022). Although his vision never came to fruition, a century later the region is home to major names in automotive production.

In 2019, Muscle Shoals had a working age population of 10,967, making up nearly a quarter of Colbert County's working age population of 44,515. Nearly one in five workers was employed in manufacturing industries for both Muscle Shoals (19.2%) and Colbert County (19.4%). Both Muscle Shoals and the county had lower unemployment rates than the state or federal workforce, 3.5 percent and 4.4 percent respectively. Muscle Shoals had a lower percentage of workers living in poverty, 6.6 percent, compared to Colbert County at 15.5 percent. The workforce was 83 percent White and 11 percent Black — less diverse than either the state or federal levels.

TABLE 21

Demographic Overview of Muscle Shoals and Colbert County

	Muscle Schoals	Colbert County	Alabama	Federal
Total Population (over 16)	10,967	44,515	3,907,144	259,662,880
Median Household Income	$60,629	$48,065	$50,536	$65,712
Muscle Schoals as a % of		126.1%	120.0%	92.3%
Unemployment Rate	3.5%	4.4%	5.9%	5.3%
Percent in Poverty	6.6%	15.5%	16.7%	13.4%
Percent employed in manufacturing[1]	19.2%	19.4%	14.3%	10.1%
White/Caucasian	83.2%	80.1%	69.6%	73.9%
Black/African American	11.2%	15.9%	26.0%	12.4%
Asian	1.1%	0.5%	1.3%	5.7%
American Indian and Alaska Native	0.1%	0.7%	0.5%	0.8%
Other	2.8%	1.5%	1.1%	4.6%
Two or more races	1.7%	1.2%	1.4%	2.4%
Latinx/Hispanic*	3.6%	2.2%	3.4%	16.2%

*can represent multiple categories above therefore categories add up to more than 100% | Source: US Census Bureau American Community Survey, 2019

SUMMARY OF RESPONDENTS

To understand workplace experiences among the employees at North American Lighting, we have survey data from 156 respondents. These respondents vary in age, race, and occupation.

TABLE 22

Demographic Overview of North American Lighting Respondents

Race/Ethnicity	White	African American	Multi-Racial	Latinx	Other	Asian	Middle Eastern	Total
Total Answered	71	36	7	3	4	0	0	**121**
Percent of Total	59%	30%	6%	2%	3%	0%	0%	**100%**

Sex	Male	Female	Other/Decline to State	Total
Total Answered	56	66	2	**124**
Percent of Total	45%	53%	2%	**100%**

Age	18-25	26-35	36-45	46-55	56-65	66+	Total
Total Answered	9	39	25	28	16	2	**188**
Percent of Total	8%	33%	21%	24%	13%	2%	**100%**

Employment Status	Regular Worker	Temporary Workers	Total
Total Answered	142	7	**149**
Percent of Total	95%	5%	**100%**

Job Description	Assembler	Coater	Materials Handler	All Other	Total
Total Answered	13	5	4	26	**48**
Percent of Total	27%	10%	8%	54%	**100%**

Place of Birth	Alabama	Mississippi	Other US State	Outside the US	Total
Total Answered	22	0	15	0	**37**
Percent of Total	59%	0%	41%	0%	**100%**

DIMENSION 1: PAY & BENEFITS

Do NAL respondents report earning a living wage? The average reported wage at North American Lighting among respondents is $18.68 per hour, placing it at the low end of the case studies and nearly $8 per hour below the living wage for a family of three. Looking at reported wages by job classification and job demographics shows significant variation in wages at the Muscle Shoals facility. Assembler respondents earned considerably less than the average, earning a reported $15.82 per hour. White respondents reported an average wage of $20.27 and Black respondents reported $16.51 an hour, a racial wage gap of $3.75 an hour.

Even more dramatic is the gender wage gap among respondents. Female workers at North American Lighting reported earning, on average, $5.42 less than their male counterparts.

Do NAL respondents report receiving basic benefits like health insurance? Virtually all NAL respondents had been offered health insurance by their employer (99%) and 88 percent received health insurance through NAL. When asked to evaluate the quality and cost of their employer provided health plans, most respondents reported positively — ranging from statements like "best in area" or "above average." Some were critical, weighing the cost against the coverage with statements such as "high and it's alright" and "not the cheapest but good insurance."

DIMENSION 2: TERMS OF EMPLOYMENT

Does NAL provide direct employment? Most NAL respondents reported being regular, direct hires with only 5 percent reporting working at NAL on a temporary contract. Workers, regardless of their gender or racial identity, reported similar employment statuses at NAL.

Do NAL respondents report opportunities for career advancement? Job satisfaction and hopes for future advancement were relatively high at North American Lighting. Half of respondents

(50%) agreed or strongly agreed with the statement “my opportunities for advancement are high.” Only 15 percent disagreed. Male and female respondents reported similar levels of hopes for future advancement, although Black respondents were more likely to disagree with the statement than White respondents, 18 percent and 10 percent, respectively.

DIMENSION 3: WORK LIFE BALANCE

Do NAL respondents report a reasonable number of working hours? Two-thirds of North American Lighting respondents worked more than 40 hours per week - including 13 percent who worked more than 50 hours per week. Black and White respondents at NAL reported similar hours worked in a normal week. Male and female respondents at NAL reported working similar schedules — with two thirds of both groups reporting working over 40 hours in a usual week.

Do NAL respondents report having predictable work schedules? Forty-one percent of respondents reported having variable schedules, with nearly one out of five (18%) reporting schedules that change from week to week. More than half (58%) reported they worked the same schedule every week. Black respondents reported being even more likely to have a stable schedule, with 69 percent reporting having the same schedule week to week compared to 54 percent of White respondents. Sixty-one percent of male and 55 percent of female respondents reported having the same schedule week to week. Among female respondents, one in five reported having a schedule that changed from week to week.

When work schedules do change, often it occurs with little advance notice. Seventy-one percent of NAL respondents reported receiving only a few hours advance notice.

DIMENSION 4: HEALTH AND SAFETY

Do NAL respondents report protection from workplace injury? Very few respondents from NAL reported risky workplace practices — seventeen percent witnessed practices that would put other workers at risk. Similarly, there was a relative low number of reported injuries. Nine percent of North American Lighting respondents reported being seriously injured at work. No discernible differences are observed in the injury data when comparing by race, gender, or job classification.

Do NAL respondents report equality of access and treatment regardless of race or gender? Respondents at North American Lighting reported varying levels and experiences of discriminatory practice. Forty-five percent of NAL respondents reported that racial discrimination was a problem at the facility — either a small (28%) or big (17%) problem.

One in four Black respondents (26%) reported that racial discrimination was a “big” problem at work. When presented with a list of common workplace examples of racially discriminatory practices, 28 percent of Black respondents reported that they “received less support from senior leaders than a person of a different race who was doing the same job.” One quarter of Black NAL respondents reported that they had “been denied a promotion because of your race.”

White NAL respondents also reported negative workplace experiences attributed to race. Fifteen percent reported they “felt isolated in your workplace because of your race” or that they “received less support from senior leaders than a person of a different race who was doing the same job.”

More than one-third of respondents (36%) reported that sexual harassment was a problem at North American Lighting with 9 percent indicating that it was a big problem, and 27 percent reported that sexual harassment was a small problem. Twelve percent of female workers reported sexual harassment as a big problem. However, nearly one in five of all female respondents at NAL (18%), reported that they have "felt uncomfortable at work because of inappropriate sexual jokes or remarks by a supervisor or co-worker."

DIMENSION 5: REPRESENTATION & VOICE

Do NAL respondents report the ability to file complaints and speak up at work? Among respondents who had witnessed production safety issues, only half felt that they could report these issues without facing retaliation. One quarter of NAL respondents reported having filed a formal complaint in the past 12 months (with either a manager, supervisor, or outside agency such as OSHA). However, more than 40 percent reported that, although they had reason to file a complaint, they chose not to do so.

The most common reason for not filing a complaint was that workers "didn't think it would make a difference." The second most common reason for suppressing a complaint was that workers reported being "afraid of losing your job."

DIMENSION 6: INTRINSIC CHARACTERISTICS

Do NAL respondents express a sense of pride derived from their work? Sixty percent of respondents agreed or strongly agreed with the statement, "I am proud to be working for my current employer." More male workers expressed higher levels of pride (67%) than female workers (55%) and more White workers expressed higher levels of pride (64%) than Black workers (55%).

SUMMARY

NAL respondents reported the second lowest pay rate among all the case studies and some of the largest race and gender pay gaps. As with most companies in the cases studies, most respondents are direct employees of NAL and are offered health insurance. A majority (58%) of NAL respondents work between 40 and 50 hours a week and relatively few are injured on the job.

NEW FLYER, ANNISTON, ALABAMA

NFI Group, based in Ontario, Canada, is a global bus manufacturer operating in ten countries and the leading market share in the North American bus and motor coach manufacturing and parts supply markets primarily under its New Flyer subsidiary. In total, the company has over 100,000 buses and coaches currently in service around the world produced at its manufacturing facilities in Canada, the United States, and the UK.

For the most recent fiscal year ending January 2, 2022, NFI Group reported $2.3 billion in annual sales and a workforce of 7,500 employees of which 72 percent or 5,400 were hourly workers and the remaining 2,100 were salaried employees (NFI Group, 2022).

New Flyer operates a bus manufacturing plant that employs 750 workers in Anniston, Alabama, and a parts supply facility under its Carfair subsidiary that employs 50 workers also located in Anniston. New Flyer acquired the Anniston facility from North American Bus Industries and the parts facility from Orion in 2013.

In 2017, the company completed a $15.1 million expansion to redesign its Anniston bus facility and build another facility called the Vehicle Innovation Center. The facility employed more than 750 workers by the end of 2018, according to the Anniston Star (Nunnally, 2019). New Flyer received an incentive package of approximately $1.4 million from Alabama city, county, and state funds (Burkhalter, 2017). The Anniston city incentive package includes 10-year abatements of the city's non-educational property tax, sales, and use taxes. New Flyer also obtained county and state sales and use tax abatements" (America, 2019).

Anniston is about one hour east of Birmingham and is in Calhoun County. For the year 2019, Anniston's population over age 15 was 17,404 while Calhoun County had a working age population of 92,886 (see table below).

Anniston median household income is lower than the surrounding County, State and National levels — just 54.9 percent of the federal level. The poverty level is 10 points higher than the state and twice the national average.

Anniston has a higher percentage of manufacturing jobs (23%) than the County, State and U.S. as a whole — more than twice the national average of 10.1 percent.

NOTABLE NEWS

An important development to note about the New Flyer case study is that its Anniston facilities are now subject to a historic community benefits agreement ("CBA") that was agreed to in May 2022 by New Flyer, the Greater Birmingham Ministries (GBM) and Jobs to Move America (JMA). Community Benefits Agreements are legally enforceable agreements between private companies and coalitions of community and labor groups to address a wide range of job pay, benefit, and training standards as well as equity measures and local hiring needs that are identified by one or all of the parties.

The CBA between New Flyer, GBM and JMA outlines the parties' commitments to invest in and support New Flyer employees and the surrounding community to improve the quality of jobs, ability of residents to get jobs, and help establish New Flyer as a preferred provider of buses among transit agencies because of high road employment practices. Key provisions of the CBA include:

- A designated community organization to assist employees in making and resolving complaints through New Flyer's internal complaint process about perceived harassment or discrimination
- Participation by the Coalition Partners in identifying employees to participate on New Flyer's environmental health committee in Anniston which regularly discusses employee safety matters
- Independent safety training by an external expert
- An extension by New Flyer of hiring protections for systems-impacted people (so-called 'ban the box' rules) that it already follows in California and Minnesota to applicants in Anniston, Alabama
- A commitment to increase Spanish bilingual capacity in New Flyer's outreach, recruitment, human resources, training materials, and workplace communications
- Provisions to allow employees to attend a semi-annual debt clinic hosted by a Coalition Partner at the New Flyer Anniston facility during non-work time.

This Community Benefits Agreement is truly historic and shows what private parties can do to address known workplace issues to improve the quality of jobs, help the community and employer absent the existence or enforcement of progressive federal, state or local policies and/or regulations. Many of the issues that the CBA addresses are issues that workers or the community identified as needing to be addressed from this research project, and it should be noted that New Flyer and its parent company, NFI have taken this positive step to address these issues.

TABLE 23

Demographic Overview of Anniston and Calhoun County

	Anniston	Calhoun County	Alabama	Federal
Total Population (over 16)	17,404	92,886	3,907,144	259,662,880
Median Household Income	$36,051	$47,255	$50,536	$65,712
Anniston as a % of		76.3%	71.3%	54.9%
Unemployment Rate	10.1%	8.1%	5.9%	5.3%
Percent in Poverty	26.6%	17.9%	16.7%	13.4%
Percent employed in manufacturing	23.0%	17.7%	14.3%	10.1%
White/Caucasian	46.1%	75.2%	69.6%	73.9%
Black/African American	50.3%	20.1%	26.0%	12.4%
Asian	1.0%	0.9%	1.3%	5.7%
American Indian and Alaska Native	0.3%	0.3%	0.5%	0.8%
Other	0.2%	1.8%	1.1%	4.6%
Two or more races	2.1%	1.7%	1.4%	2.4%
Latinx/Hispanic*	2.1%	3.0%	3.4%	16.2%

*can represent multiple categories above therefore categories add up to more than 100% | Source: US Census Bureau American Community Survey, 2019

Anniston's workforce is majority Black (50.3%), significantly more than the percentage of Black workforce in Calhoun County (20%) and Alabama as a whole (26%).

SUMMARY OF RESPONDENTS

To better understand the impact of local investments on individuals and communities, we present data from 112 respondents who work at New Flyer and its wholly owned subsidiary and collocated parts producer Carfair Composites. These respondents, collectively referred to here as NFI respondents, come from various job classifications, ethnicities, ages, and genders. A summary of the demographic profiles of our New Flyer Respondents are in Table 22.

TABLE 24

Demographic Overview of New Flyer Industries Respondents

Race/Ethnicity	White	African American	Multi-Racial	Latinx	Other	Asian	Middle Eastern	Total
Total Answered	68	22	7	0	2	1	0	**100**
Percent of Total	68%	22%	7%	0%	2%	1%	0%	**100%**

Sex	Male	Female	Other/Decline to State	Total
Total Answered	59	38	3	**100**
Percent of Total	59%	38%	3%	**100%**

Age	18-25	26-35	36-45	46-55	56-65	66+	Total
Total Answered	9	39	25	28	16	2	**188**
Percent of Total	8%	33%	21%	24%	13%	2%	**100%**

Employment Status	Regular Worker	Temporary Workers	Total
Total Answered	95	11	**106**
Percent of Total	90%	10%	**100%**

Job Description	Assembler	Welder	Fabricator	Painter	All Other	Total
Total Answered	17	6	2	2	8	**35**
Percent of Total	49%	17%	6%	6%	23%	**100%**

DIMENSION 1: PAY & BENEFITS

Do NFI respondents report earning a living wage? Reported average wages among respondents fall short of a livable standard that would support a family. Among NFI respondents, the average reported wage is $19.24 per hour.

The results showed a variation of wages across jobs. For those job categories which had sufficient numbers of respondents — Assemblers had the lowest reported average wage at $15.81 and Welders had the highest average at $21.67 an hour.

Demographic differences in average reported wages are observed in the survey data from NFI respondents. Male and White respondents reported higher wages than other groups. Male NFI workers reported earning, on average, $2.57 more per hour than female workers (male respondents' average was $20.10 and female respondents' average was $17.53).

An even larger gap is seen when comparing average reported wages by race. Survey response data shows a $2.65 an hour racial wage gap at NFI. White respondents reported an average of $19.74 and Black respondents reported an average wage of $17.09.

These gaps, a $2.57 gender gap and $2.65 race gap, may seem small but they do add up over the course of a year and a career. An average full-time worker puts in 2080 hours per year, and at that rate the annualized average gender wage gap is $5,354 and the racial wage gap is $5,512.

Do NFI respondents report receiving basic benefits like health insurance? Nearly all NFI respondents had been offered employee-sponsored health insurance (98%) and most were receiving health insurance from NFI (91%). Others reported that they received health insurance coverage from another source. When asked to describe the quality and cost of their employee-sponsored health plans, the results were mixed. Many reported that it was fine, but others provided comments such as "it's not the best" or "it is okay." Others commented that the costs were too high given the quality

of coverage and that the quality of coverage had declined over time. For example, one worker wrote that the health insurance is “to (sic) high for what’s actually covered” and another wrote “cost is to (sic) high, quality poor.”

DIMENSION 2: TERMS OF EMPLOYMENT

Does NFI provide direct employment? Ten percent of respondents who work at NFI identified as temporary workers — paid by a staffing agency but assigned to work at a NFI facility. The other 90 percent of NFI respondents reported that they are directly employed by the company. Women and Black respondents at NFI were more likely to be employed on a temporary contract through a staffing agency. Nineteen percent of Black respondents were temporary compared to 7 percent of White respondents. Thirteen percent of female respondents were temporary compared to 8 percent of male respondents.

Do NFI respondents report opportunities for career advancement? Just under half (48%) of NFI respondents reported they agreed or strongly agreed with the statement “my opportunities for advancement are high.” Black workers were less optimistic than their colleagues. Only thirty-five percent of Black NFI respondents agreed, or strongly agreed, that their opportunities for advancement were high, compared with more than half of White workers (54%).

DIMENSION 3: WORK LIFE BALANCE

Do NFI respondents report a reasonable number of working hours? Approximately three quarters (76%) of respondents reported working between 40 and 50 hours per week at New Flyer. More than half (57%) of NFI respondents reported working more than 40 hours per week, and 18 percent reported working more than 50 hours in a week.

Male respondents were more likely to put in extra-long shifts at NFI with 27 percent of males reporting working more than 50 hours per week compared to 7 percent of females. Black respondents were also more likely to report working long shifts, with 62 percent reporting working more than 40 hours a week and nearly a third (31%) more than 50 hours. Half of White respondents reported working more than 40 hours a week and 11 percent more than 50 hours in a week.

Do NFI respondents report having predictable work schedules? Nearly one-third of NFI respondents reported having a variable work schedule, of whom 16 percent had a schedule that changed week to week. Male and female respondents reported having similar rates of schedule variation. Black respondents at NFI were less likely to report a stable work schedule. Thirty-seven percent (37%) of Black respondents reported a schedule that changed from week to week, compared to just 10 percent of White respondents. When schedules change, workers reported being given very little advance notice. Two-thirds of respondents reported receiving only a few hours warning of a shift change, and 22 percent reported receiving one day notice.

DIMENSION 4: HEALTH AND SAFETY

Do NFI respondents report protection from workplace injury? Thirteen percent of respondents reported being seriously injured while working. Black respondents were more likely to have been injured at work, 21 percent, compared to 11 percent of White respondents.

Do NFI respondents report equality of access and treatment regardless of race or gender? Forty-two percent of NFI respondents reported that racial discrimination was a problem at work — 21 percent reported it is a "big" problem, and 21 percent reported it is a "small" problem. Significant variation is observed between Black and White respondents in their evaluation of the racial environment at NFI. While just 10 percent of White respondents reported believing racial discrimination was a "big" problem, 44 percent of Black respondents reported that it was a "big" problem and another 28 percent reported it was a "small" problem.

The three most commonly reported experiences of unfair or discriminatory experiences at work, as reported by Black NFI respondents were:

- Felt isolated in your workplace because of your race
- Received less support from senior leaders than a person of a different race who was doing the same job
- Had someone treat you as if you were not competent because of your race

Roughly similar rates of male (28%) and female (32%) respondents agreed that sexual harassment was a problem at work, however the degree to which respondents reported sexual harassment in the workplace differs. While 13 percent of female respondents reported it was a big problem, only 4 percent of males reported it as such.

The three most commonly reported experiences of gender-based discriminatory or unfair behavior or unfair practices among respondents were:

- Had someone treat you as if you were not competent because of your gender
- Received less support from senior leaders than a person of a different gender who was doing the same job
- Felt uncomfortable at work because of inappropriate sexual jokes or remarks by a supervisor or co-worker

DIMENSION 5: REPRESENTATION & VOICE

Do NFI respondents report having the ability to file complaints and speak up at work? At NFI, nearly half (47%) of respondents reported that they did not feel able to report safety concerns without retaliation. When asked if they ever filed a formal complaint with either a supervisor or governmental agency, 23 percent said they had done so. However, of those who had not filed a complaint, 42 percent reported they had an issue worthy of reporting that they opted to suppress. Black respondents were more likely to have withheld complaints — 59 percent withheld complaints compared to 39 percent of White respondents. Such issues may have gone unresolved in part because workers feared to report unsafe working conditions.

The most common reason for not reporting an issue was that workers "didn't think it would make a difference." The second and third most cited reasons are being "afraid of losing your job" and having "seen other co-workers disciplined (fired, threatened, or treated badly) for speaking up."

DIMENSION 6: INTRINSIC CHARACTERISTICS

Do NFI respondents express a sense of pride derived from their work? In spite of some of the above challenges, two-thirds (66%) of workers were proud to work for NFI. White workers expressed higher rates of pride — 72 percent agree or strongly agree with the statement "I am proud to be working for my current employer," compared to 50 percent of Black workers.

SUMMARY

New Flyer respondents indicate similar results among job quality dimensions like offering health insurance and employing most respondents as direct employees. New Flyer respondents also reported more predictable work schedules, but a majority of respondents (57%) reported working more than 40 hours in a week. The biggest deficiencies are in the low reported pay rates (third lowest among the cases studies), and race and gender reported average pay gaps of more than $2.50. Those race dynamics show up in the results on race discrimination being a problem at New Flyer where an overwhelming majority (72%) of Black respondents indicated race discrimination was a problem and 44 percent said it was a big problem.

To the credit of New Flyer and the community groups advocating for the New Flyer workers and the greater Birmingham community, many of the job quality deficiencies reported by the respondents of this survey are addressed in the landmark Community Benefits Agreement between New Flyer and the community signed in May 2022.

SMP: COTTONDALE, ALABAMA

SMP Automotive is a parts manufacturer that is part of an India-based company that goes by the name of Samvardhana Motherson International Limited. The parent company is one of the largest automotive and transportation parts suppliers in the world with 135,000 employees working in over 270 facilities in 41 countries around the world. It has three main divisions: Wiring Harness, Vision Systems, and Modules & Polymer Products. The legacy SMP operations fall under the Modules & Polymer Products division (Motherson, N.D).

Samvardhana Motherson Peguform (SMP) was originally founded in Boetzingen, Germany under the name of Badische Plasikwerke and was purchased by Indian-based Motherson in 2011. The legacy SMP company has 36 production facilities in 9 countries employing more than 13,000 people worldwide. SMP Automotive's U.S. facility is in the small city of Cottondale, Alabama just east of the city of Tuscaloosa in Tuscaloosa County. The facility provides automotive parts to the Mercedes Benz facility in Vance, Alabama, and produces parts such as bumpers, grills, and door panels.

SMP began construction on the Cottondale facility in 2016 and began production in 2018. SMP now employs 1,900 workers at the facility and the company has plans to expand into a new site on that campus that will add another 100 workers (Reynolds, 2021).

Cottondale is a small unincorporated community and had a working age population of 2,367 in 2019. It had a higher level of poverty (21.4%) than Tuscaloosa County and the State of Alabama. Cottondale's Black working age population was similar to the state at 25 percent, but had a higher number of residents identifying as Latinx/Hispanic 10.56 percent to 2.97 percent for the county and 3.39 percent for the state.

TABLE 25

Demographic Overview of Cottondale and Tuscaloosa County

	Cottondale	Tuscaloosa County	Alabama	Federal
Total Population (over 16)	2,367	168,197	3,907,144	259,662,880
Median Household Income	NR	$53,326	$50,536	$65,712
Unemployment Rate	5.0%	5.8%	5.9%	5.3%
Percent in Poverty	21.4%	17.7%	16.7%	13.4%
Percent employed in manufacturing	NR	14.6%	14.3%	10.1%
White/Caucasian	69.6%	66.0%	69.6%	73.9%
Black/African American	25.8%	30.6%	26.0%	12.4%
Asian	0.0%	1.5%	1.3%	5.7%
American Indian and Alaska Native	0.3%	0.2%	0.5%	0.8%
Other	3.4%	0.6%	1.1%	4.6%
Two or more races	0.9%	1.0%	1.4%	2.4%
Latinx/Hispanic*	10.6%	3.0%	3.4%	16.2%

*can represent multiple categories above therefore categories add up to more than 100% | Source: US Census Bureau American Community Survey, 2019

SUMMARY OF RESPONDENTS

To understand the working experiences and conditions among parts producers, we present survey responses from 81 workers at SMP. These workers vary in age, race, sex, and job classification. A summary of the respondents' profile is in Table 24.

TABLE 26

Demographic Overview of SMP Respondents

Race/Ethnicity	White	African American	Multi-Racial	Latinx	Other	Asian	Middle Eastern	Total
Total Answered	27	25	4	1	3	1	0	**61**
Percent of Total	44%	41%	7%	2%	5%	2%	0%	**100%**

Sex	Male	Female	Other/Decline to State	Total
Total Answered	27	29	7	**63**
Percent of Total	43%	46%	11%	**100%**

Age	18-25	26-35	36-45	46-55	56-65	66+	Total
Total Answered	6	23	17	9	4	0	**59**
Percent of Total	10%	39%	29%	15%	7%	0%	**100%**

Employment Status	Regular Worker	Temporary Workers	Total
Total Answered	60	10	**70**
Percent of Total	86%	14%	**100%**

Job Description	Assembler	Quality Control	Manager	Maintenance	All Other	Total
Total Answered	14	16	9	8	31	**78**
Percent of Total	18%	21%	12%	10%	40%	**100%**

Place of Birth	Alabama	Mississippi	Other US State	Outside the US	Total
Total Answered	33	2	8	4	**47**
Percent of Total	70%	4%	17%	9%	**100%**

DIMENSION 1: PAY & BENEFITS

Do SMP respondents report earning a living wage? The average reported hourly wage for respondents at SMP was $20.47 an hour, nearly $6 below hourly pay to support a family of three. Assembler respondents reported some of the lowest wages with an average of $16.67. Maintenance workers reported an average of $26.33 an hour.

Among survey respondents, White workers earned significantly more than Black workers at SMP. The average reported hourly wage for White SMP respondents was $23.81 compared to $17.62 for Black respondents. This is an hourly gap of $6.19. Even after removing the outliers, the gap is persistent, and only drops to $5.13 an hour and represents one of the largest gaps among the case studies.

Respondent data also demonstrates a gender wage gap of $2.41 an hour. Male respondents earned an average of $22.08 and female respondents earned $19.67 an hour.

Do SMP respondents report receiving basic benefits like health insurance? Ninety-five percent of SMP respondents had been offered health insurance from their employer and 93 percent were getting health insurance from SMP. When asked to describe the quality and cost of their employer provided health insurance, responses varied. Some reported that it was “reasonable”, “adequate”, and “decent.” One worker said the SMP health insurance was “not the best I’ve ever had but it’s also not the worst.”

DIMENSION 2: TERMS OF EMPLOYMENT

Does SMP provide direct employment? Approximately 1 in 7 (14%) SMP respondents were working on a temporary basis (paid by a staffing agency but working at SMP). This was one of the highest rates of temporary employment in this study. The remaining 85 percent were employed as direct hires by SMP.

Do SMP respondents report opportunities for career advancement? Opportunity for advancement and professional growth at SMP among respondents were limited. More than half (52%) of respondents disagreed or strongly disagreed with the statement “my opportunities for advancement are high.” Female workers and Black workers were less optimistic about their opportunities for advancement with 64 percent of each group disagreeing or strongly disagreeing that their opportunities were high.

DIMENSION 3: WORK LIFE BALANCE

Do SMP respondents report a reasonable number of working hours? Respondents at SMP put in long hours — 87 percent of respondents work more than 40 hours in a week, with 45 percent working more than 50 hours per week. Assemblers reported some of the highest rates of long shifts with 62 percent of Assemblers working at least 51 hours per week. Black workers reported working more hours per week with more than 1 in 5 Black respondents (22%) working more than 60 hours in a week.

Do SMP respondents report having predictable work schedules? Over one-third (36%) of respondents at the SMP facility reported working a variable work schedule, with a quarter (25%) reporting a work schedule that changes from week to week. This trend holds across race, but 30 percent of female respondents reported having schedules that changed from week to week compared to just 14 percent of males.

DIMENSION 4: HEALTH AND SAFETY

Do SMP respondents report protection from workplace injury? Among respondents from SMP, 29 percent, reported witnessing production practices that may put workers at risk. These rates were similar regardless of the race of the respondent. Some respondents wrote in examples of unsafe workplace practices ranging from incorrect "ppe for the job" to using "inferior" exhaust systems that put workers at risk. Reported injury rates among respondents were low at the SMP facilities, with only one respondent reporting being seriously injured at work.

Do SMP respondents report equality of access and treatment regardless of race or gender? More than half (56%) of respondents at SMP reported that racial discrimination was a problem - 31 percent report it was a small problem, and 25 percent report it was a big problem.

Black respondents were more likely to report that racial discrimination was a problem. More than one in three (39%) Black respondents reported that discrimination was a big problem and one-third reported it as a small problem.

The survey includes a list of common experiences of racial discrimination in the workplace. Respondents from SMP reported 69 instances - many of which were experienced by multiple workers. The most commonly (15%) reported experiences of racial discrimination was being treated "as if you were not competent because of your race." Disaggregating responses by race shows that just 11 percent of White respondents reported being treated incompetently compared to 32 percent of Black respondents.

Among Black SMP respondents, the three most common experiences of racial discrimination at work are:

- Had someone treat you as if you were not competent because of your race
- Been passed over for the most important assignments because of your race
- Received less support from senior leaders than a person of a different race who was doing the same job

Black respondents at SMP were not the only ones to report racial discrimination at the workplace. Fifteen percent of White workers reported:

- Experienced overt remarks, slurs, or derogatory language because of your race
- Experienced repeated, small slights at work because of your race
- Felt isolated in your workplace because of your race

Half of respondents reported that sexual harassment was a problem at SMP. Twenty-one percent reported that it was a big problem, and 29 percent reported it was a small problem at work. Female respondents are evenly split with approximately one third reporting sexual harassment as a big problem, one third reporting it as a small problem, and one third reporting it was not a problem.

Male respondents, on the other hand, overwhelming reported (72%) that sexual harassment was not a problem.

Female respondents at SMP reported nearly all instances of gender based discriminatory treatment (98%). The most commonly reported experience was having "someone treat you as if you were not competent because of your gender." The next most common reported experiences were:

- Felt uncomfortable at work because of inappropriate sexual jobs or remarks
- Experienced repeated, small slights at work because of your gender
- Received less support from senior leaders than a person of different gender who was doing the same job
- Felt isolated in your workplace because of your gender
- Been denied a promotion because of your gender

DIMENSION 5: REPRESENTATION & VOICE

Do SMP respondents report the ability to file complaints and speak up at work? Risky workplace practices may go unaddressed at SMP. Seventy-one percent of respondents reported not feeling they could report production safety issues without facing retaliation. This is the highest among the case studies.

When asked about filing formal complaints with either managers or outside regulators (e.g., OSHA), 27 percent of SMP respondents reported that they had filed a complaint in the previous 12 months. However, 70 percent of respondents reported there had been times they did not file a complaint even though they had a problem at their job.

The most common reason for filing a complaint was "not paid on time." The second most common set of complaints were about "forced overtime," "abuse or harassment by supervisors," and "increased workloads."

Among those who had not filed a complaint, the most common reason was that they "didn't think it would make a difference." The second most common reason was being "afraid of losing job."

DIMENSION 6: INTRINSIC CHARACTERISTICS

Do SMP respondents express a sense of pride derived from their work? Only one third (35%) of SMP respondents reported being proud to work for their current employer. This is the lowest among the case studies. Instead, 40 percent of respondents disagreed with the statement "I am proud to be working for my current employer." The 40 percent disagree rate is the highest among the case studies. Fifty-eight percent of Black respondents and more than half (52%) of female respondents at SMP reported not having pride in working for their employer.

SUMMARY

SMP respondents, like the others in the case studies, indicated that they participated in the company health insurance, and most were employed as direct employees. However, SMP respondents reported average wages below a living wage and sizable race ($6.19), and gender ($2.41)

pay gaps that are cause for concern. Those reported pay gaps play out in other results as a majority of respondents (52%) didn't think there were opportunities for advancement, and nearly two-thirds of Black and female respondents didn't think there were opportunities for advancement. SMP respondents reported working long hours — 87 percent reported working more than 40 hours in a week and 45 percent reported working more than 50 hours a week. Nearly three-quarters (72%) and two-thirds (64%) of Black and female respondents reported race and gender discrimination as a problem respectively. Just over one-third of respondents reported being proud to work for SMP, among the lowest across the case studies, while 40 percent reported not being proud. A majority of Black (58%) and female (52%) respondents reported a lack of pride, by far the highest among the case studies.

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