

GSG

Labor Supply

Certification

Missouri Northeast



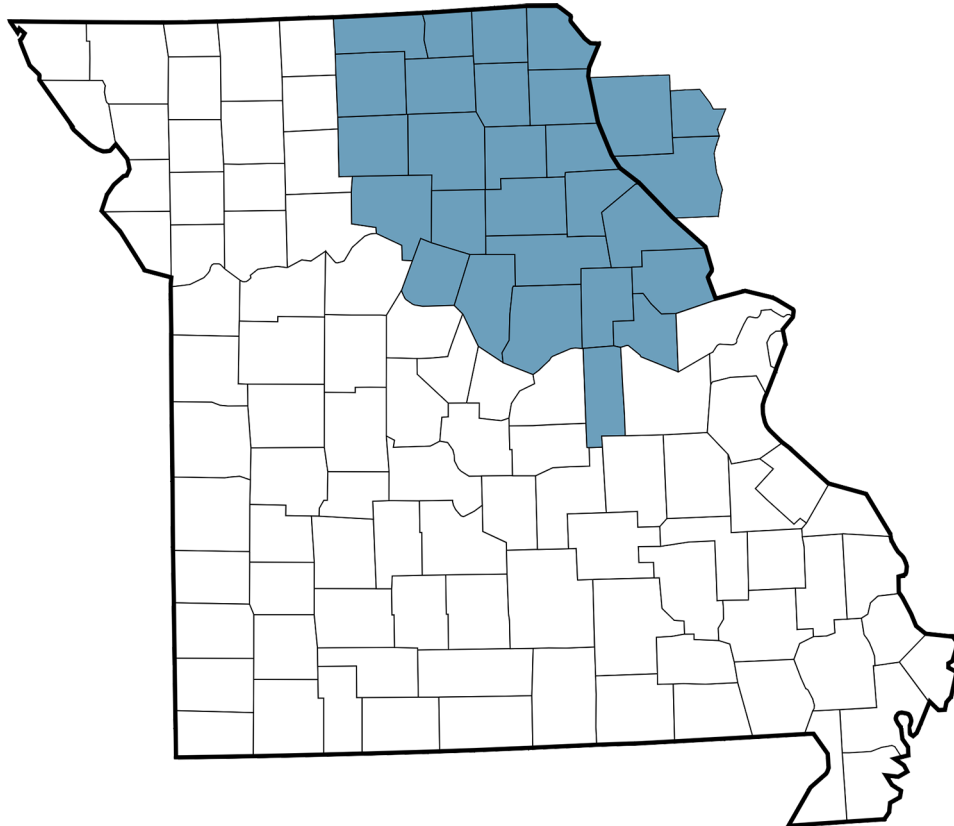
Underemployment

Available Skills

Desired Wages

Missouri Northeast Labor Supply Certification

Partners in Economic Development



October 2022



The questions and the design of the survey instrument are part of the GSG Labor Supply Certification Program, copy-righted and owned by Growth Services Group, LLC. The Growth Services Group is an independent Labor Market Research Consultant. The findings were developed from the data without any outside influence.

Table Of Contents

Executive Summary	1
Introduction	1
General Findings, Opportunities, and Challenges	1
Workforce Availability Findings	2
Overview	3
Introduction	3
<i>Total Available Workforce Overview (table)</i>	3
Available Workforce	4
Total Available Workforce	4
<i>Available Workforce Work Status (table)</i>	4
<i>Summary Workforce Results (table)</i>	4
<i>Available Workforce by County (map)</i>	4
Average Age and Years on Job	5
<i>Age & Experience by Occupational Cluster (table)</i>	5
<i>Age & Experience by Standard Occupational Classification (SOC)</i>	5
Current and Previous/Other Work Experience	6
<i>Worker Available Work Experience (table)</i>	6
<i>Worker Available Work Experience (chart)</i>	7
Student Debt	8
<i>Student Debt by Age Group (table)</i>	8
<i>Student Debt Current and Total Available Workforce (chart)</i>	8
Household Income	9
<i>Household Income by Age Group (table)</i>	9
<i>Household Income Current and Total Available Workforce (chart)</i>	9
Worker Available Workforce	10
<i>Worker Available Breakout (table)</i>	10
<i>Total Available Workforce Makeup (chart)</i>	10
Underemployed	11
<i>Workforce Characteristics (table)</i>	11
Age and Sex	11
Education and Training	11
<i>Education Attainment (table)</i>	11
Work Experience and Environment	11
<i>Primary Industry Sector (table)</i>	11

[illegible]

Desired Wages and Benefits	17
Desired Benefits	17
<i>Desired Benefits by Subset (table)</i>	17
<i>Available Workforce Desired Benefits (chart)</i>	17
Desired Wage Rate Ranges	18
<i>Total Available Workforce Desired Wage (table)</i>	18
<i>Desired Wage Rate by Available Workforce Subset (table)</i>	18
Desired Wage Rate By Industry and Occupation	19
<i>Desired Wage Rate by Industry (table)</i>	19
<i>Desired Wage Rate by Occupation (table)</i>	19
<i>Desired Wage Rate by Percent of Available Workforce (chart)</i>	19
Occupation Current and Desired Wages	20
<i>Occupation Current and Desired Wages (table)</i>	20
Commuting Patterns and Career Preferences	21
Willingness to Commute by Available Workforce Group	21
<i>Preferred Commute by Distance (table)</i>	21
<i>Preferred Commute by Subset (table)</i>	21
<i>Preferred Commute by Occupation (table)</i>	21
<i>Preferred Commute by Industry (table)</i>	21
Worker Primary Interest	22
<i>Primary Work Interest by Available Workforce Subset (table)</i>	22
Changing Primary Employment Field	22
<i>Willing To Change Primary Occupation or Industry (table)</i>	22
Workforce Health and Covid-19 Impact	23
Workforce Impact	23
Teleworking	23
<i>Teleworking Options (table)</i>	23
<i>Teleworking Adoption (table)</i>	23
Job Loss	23
Health Insurance Coverage	23
<i>Health Insurance Coverage (table)</i>	23
<i>Health Insurance Source (table)</i>	23
Conclusion	24
Appendices	
Appendix A-Wage and Salary Conversion Rates	A-1
Appendix B-Methodology	B-1

Executive Summary

Introduction

Missouri Northeast commissioned a Labor Supply Study to measure the amount and quality of potential employees in a twenty-eight county Area Labor Market (ALM). The twenty-eight counties are: Adair; Adams, IL; Audrain; Boone; Brown, IL; Callaway; Chariton; Clark; Gasconade; Howard; Knox; Lewis; Lincoln; Linn; Macon; Marion; Monroe; Montgomery; Pike, IL; Pike, MO; Putnam; Ralls; Randolph; Schuyler; Scotland; Shelby; Sullivan; and Warren. In order to provide the most accurate and comprehensive analysis of the ALM's workforce, special attention was placed on soliciting responses from six distinct cohorts (Males and Females across ages 18-29, 30-54, and 55-69) in each county.

The purpose of this report is to assess the available workforce in the Missouri Northeast Area Labor Market. The Total Available Workforce represents those who indicate that they are looking for employment or would consider changing their employment for the right job opportunity. See Appendix B for more detailed discussion of the methodology and data definitions.

General Findings, Opportunities, and Challenges

This Labor Supply Certification Study demonstrates that the Missouri Northeast ALM provides a stable and productive workforce that is significantly underutilized. The availability, education, and skills add value and competitiveness to the Area Labor Market. The components of this study seek to quantify the strengths and challenges of this laborforce as well as the impact the COVID-19 pandemic has had on workers in the state.

**Total Available
Workforce**
332,900

Underemployed
94,600

A subset of the Total Available Workforce of interest to many employers undertaking a large scale hiring effort are those who are identified as Underemployed. These individuals are currently working, would take a better job if offered, and they possess the skills, education, and experience to qualify them to do so. Of the 332,900 people in the Total Available Workforce, 94,600 are considered Underemployed (see more on page 11).

With the right employment opportunities, the Missouri Northeast ALM appears poised to provide the talent necessary for growth of new and existing businesses representing regional, national, and international markets. The ALM provides advantages such as easy access to both two and four-year education institutions throughout the ALM, a large and diverse workforce talent pool with an easy commute to labor market centers, and the cost advantages of rural settings.

Workforce Availability Findings

The workforce availability findings reflect the views and perspectives of people between the ages of 18 and 69 who would consider seeking or changing employment. This group represents the supply side of the workforce market. The overall findings are as follows:

- About 50 percent (332,900 persons) of the Census Population Estimate in the Missouri Northeast ALM is considered to be in the Total Available workforce.
- It is estimated 279,600 workers in the Worker Available subset of the Total Available Workforce are willing to change jobs if the right opportunity arises.
- The Non-Worker Available segment of the Total Available Workforce is comprised of 14,000 Retired, and 39,300 Not Employed.
- Nine percent of the Not Employed Workforce indicate that they are not working as a direct result of Covid-19.
- Approximately 28 percent of the Total Available Workforce are Underemployed (94,600).
- About 50 percent of the Total Available Workforce would be interested in new or different employment with a wage of up to \$27.00; 25 percent would require \$39.00 or more per hour for a new job opportunity.
- The education level of the Total Available Workforce includes 66 percent with at least some college education and 98 percent with at least a high school diploma.
- The Total Available Workforce is willing to commute an average of 22.7 miles one way. Of the Total Available Workforce, 79 percent (263,700 people) would travel more than 10 miles one way for work while 25 percent (83,300) would commute more than 30 miles and 5 percent (16,300) would travel more than 50 miles.
- The overall average age of the Total Available Workforce is 40.2. The average age of the Worker Available workforce by occupational cluster is 42.9 for Management, 38.6 for Production/Repair/Installation, 41.9 for Professional/Technical, and 37.9 for Services sector.
- The top motivators for changing jobs among those open for the right opportunities are 69 percent salary, 64 percent Health Benefits, and 58 percent Work/Life balance.
- A majority, 86 percent, of the Worker Available workforce stated they are willing to work outside of their primary field of employment (i.e., those in manufacturing would be willing to work in the service sector, etc.).
- The average years on the job for the Overall ALM is 9.9 years which reflects a stable and mature workforce.
- The Underemployed provide the best opportunity for potential applicants. They represent a subset of the Total Available workforce that is normally more experienced, better educated, and more motivated than the Total Available Workforce in general.

Overview

Introduction

The primary purpose of the Missouri Northeast Labor Supply Study is to determine the number of workers available for employers considering expansions and major investment in the state. The Total Available Workforce represents respondents who indicate they are either looking for employment or would consider changing jobs for the right employment opportunities. The key advantage of a Labor Supply Study is that it provides a more comprehensive view of the pool of potential workers by including workers typically excluded from the civilian labor force. It also allows researchers to examine those members of the Area Labor Market (ALM) pool who have a propensity to consider a job opportunity given their employment expectations.

The focus of this study is the Missouri Northeast ALM. The ALM for the purpose of this study is defined as the area or region from which the labor market draws its commuting workers; The Missouri Northeast ALM consists of twenty-eight counties. This broad market study provides smaller regions and labor markets the opportunity to analyze their labor supply with a common methodology and database. This report also includes workers who are commuting out of the designated ALM to work but would be willing to work closer to home with the right employment opportunities (11 percent of the Worker Available subset). The following table provides an overview of the Total Available Workforce including the subset groups from the Worker Available (willing to change jobs) and the Non-Worker Available (willing to work) populations within the ALM.

The findings from this survey are based on a type of stratified random marketing and social media campaign of 932 adults living in the Missouri Northeast ALM. Missouri Northeast contracted with Growth Services Group (GSG) to design and administer the Labor Supply Study. All adults, whether working or non-working, between the ages of 18 and 69 were considered in this study. In an effort to capture as broad and varied a sampling as possible, GSG conducted the survey phase using multiple methods of soliciting participation including a robust social media campaign, reaching out directly to members of the workforce through multiple platforms, and coordinating with partner organizations. At each step of the process, data validation methods were employed to ensure data integrity and that the sampling accurately reflects the Census 18-69 Population as reliably as possible.

When all respondents are included in the analysis, the survey aggregate results have a margin of error as low as 3.2 percent at a 95% confidence level. Exact margin of error varies by figure depending on number of responses and question options; very granular data points such as years of work experience for a single occupation will have a higher margin of error. A more detailed description of the survey process and methodology is presented in Appendix B.

Total Available Workforce Overview

Subset	Overall	Percent
Total Available Workforce	332,900	100%
Worker Available	279,600	84%
Underemployed	94,600	28%
Seeking Different Employment	55,300	17%
Willing to Change	129,800	39%
Non-worker Available	53,200	16%
Not Employed	39,300	12%
Retired	14,000	4%

While all those in the Worker Available workforce are willing to change with the right opportunity, 94,600 are also identified as Underemployed and 55,300 are actively Seeking Different Employment. The remaining 129,800 identified as Willing to Change are willing to change only for the right opportunity.

Among the 53,200 Non-worker Available, all are willing to work with the right opportunity. The Not Employed subset includes both unemployed as defined by BLS (those who are seeking employment) as well as those that are not looking but are willing to accept the right opportunity who are not covered in the BLS definition.

Available Workforce

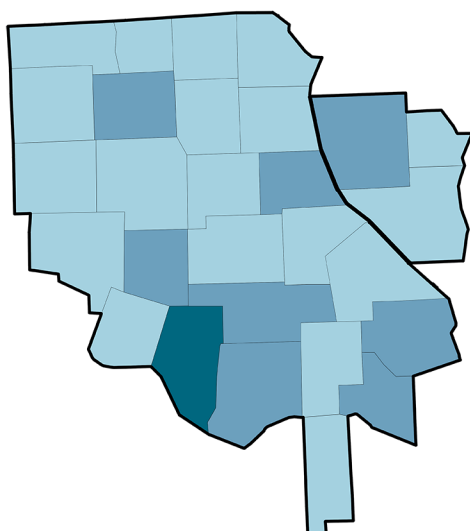
Total Available Workforce

The following table describes the Total Available Workforce in the Missouri Northeast ALM. The Total Available Workforce for the ALM represents 332,900 people which consist of 279,600 working and 53,200 non-working. This demonstrates a workforce that is more than sufficient in scope and diversity to support most employers considering location or expansion in the ALM.

The map below shows how each county in the ALM compares in terms of the number of Available Workforce. Each county is grouped into one of three categories specified in the legend.

The summary table below shows a Total Available Workforce of 332,900, 50.1 percent of the estimated ALM Census Population and 75.2 percent of the estimated ALM Census 18-69 Population. The table further presents the subsets of Total Available Workforce and Underemployed by sex and age cohorts. Males make up 49.1 percent and females 50.9 percent of the Total Available Workforce. Those in the Age 30-54 cohort make up 45 percent to the Total Available Workforce but 52 percent of the Underemployed subset.

Available Workforce by County



Workforce	Color
Less than 10,000	Light Blue
10,000 - 50,000	Medium Blue
50,000 or More	Dark Blue

Available Workforce by Work Status

Work Status	Population	Percent
Total Available Workforce	332,900	100%
Worker Available	279,600	84%
Working (Withholdings)	233,400	70%
Self-Employed (No Withholdings)	23,700	7%
Working Student	20,200	6%
Military	2,400	1%
Non-worker Available	53,200	16%
Not Employed	33,700	10%
Retired	14,000	4%
Non-Working Student	5,500	2%

Summary Workforce Results

Subset	Overall	Percent
Population and Civilian Labor Force		
Census Population	664,100	100%
Census 18-69 Population	442,400	100%
Census 18-69 Male Population	220,500	49.8%
Census 18-69 Female Population	221,900	50.2%
Total Available Workforce		
Total Available Workforce	332,900	100%
Male	163,600	49.1%
Female	169,300	50.9%
Age 18-29	108,800	33%
Age 30-54	150,100	45%
Age 55-69	73,900	22%
Underemployed		
Underemployed	94,600	100%
Male	41,900	44%
Female	52,700	56%
Age 18-29	26,900	28%
Age 30-54	49,600	52%
Age 55-69	18,000	19%

Sources: Census and Bureau of Labor Statistics (BLS) Population and Labor Force Estimates

Underemployment is a subset and is included in Total Available Workforce statistics

Average Age and Years on the Job

The average age and years on the job for the various occupational clusters indicate a mature, experienced, and diverse Available Workforce. The Non-worker Available subset has a higher average age (40.6) compared to the Total Available Workforce due primarily to Retired Non-workers not actively seeking but available for the right opportunity (23 percent of Non-Worker Available; Avg. Age of 65.1). The average age for the Total Available Workforce is 40.2.

Age & Experience by Occupational Cluster

Occupational Cluster	Avg. Age	Years on Job
Management	42.9	11.0
Production/Repair/Installation	38.6	9.8
Professional/Technical	41.9	12.3
Services	37.9	7.6
Non-Worker Available	40.6	-
Total Available Workforce	40.2	9.9

The three oldest occupation groups are: Farming, Fishing, and Forestry; Legal; and Educational Instruction and Library. The three youngest occupation groups are: Arts, Design, Entertainment, Sports, and Media; Food Preparation and Serving; and Transportation and Material Moving. The average age of the Worker Available workforce across all occupations is 40.1.

The top three occupation groups by most years on the job are: Construction and Extraction; Computer and Mathematical; and Architecture and Engineering. The three occupation groups with the least years on the job are: Food Preparation and Serving; Arts, Design, Entertainment, Sports, and Media; and Building and Grounds Cleaning and Maintenance.

Age & Experience by Standard Occupational Classification (SOC)

Occupational Classification	Avg. Age	Years on Job
Architecture and Engineering	37	14
Arts, Design, Entertainment, Sports, and Media	30	5
Building and Grounds Cleaning and Maintenance	44	5
Business and Financial Operations	41	12
Community and Social Service	41	13
Computer and Mathematical	41	14
Construction and Extraction	41	14
Educational Instruction and Library	44	11
Farming, Fishing, and Forestry	50	12
Food Preparation and Serving Related	30	4
Healthcare Practitioners and Technical	41	11
Healthcare Support	37	7
Installation, Maintenance, and Repair	39	12
Legal	50	13
Life, Physical, and Social Science	43	13
Management	43	11
Office and Administrative Support	43	9
Personal Care and Service	36	5
Production	35	7
Protective Service	38	9
Sales and Related	37	7
Transportation and Material Moving	35	8
Total Worker Available	40.1	9.9

Current and Previous/Other Work Experience

The following table shows the number of workers in the Worker Available subset aligned with each occupation by Primary or Secondary job as well as those with Underutilized or Unutilized skills. The table provides a perspective on the types of workers available for employment in the Missouri Northeast ALM. The first two columns in the table show the number of workers in the Worker Available subset currently employed in each of the various occupational classifications for their Primary or Secondary employment respectively. Workers working both a Primary and Secondary job in the same occupational classification are only counted once and are shown in the Primary column.

Underutilized workers are currently working in the associated occupation but report having underutilized knowledge, skills, or abilities within the occupation or they are employed less than full-time but desire full-time employment. Unutilized workers, by contrast, are currently working in a different occupation but report having additional knowledge, skills, or abilities in the associated occupation. Workers must have completed education beyond high school to be included in the Underutilized and/or Unutilized segments.

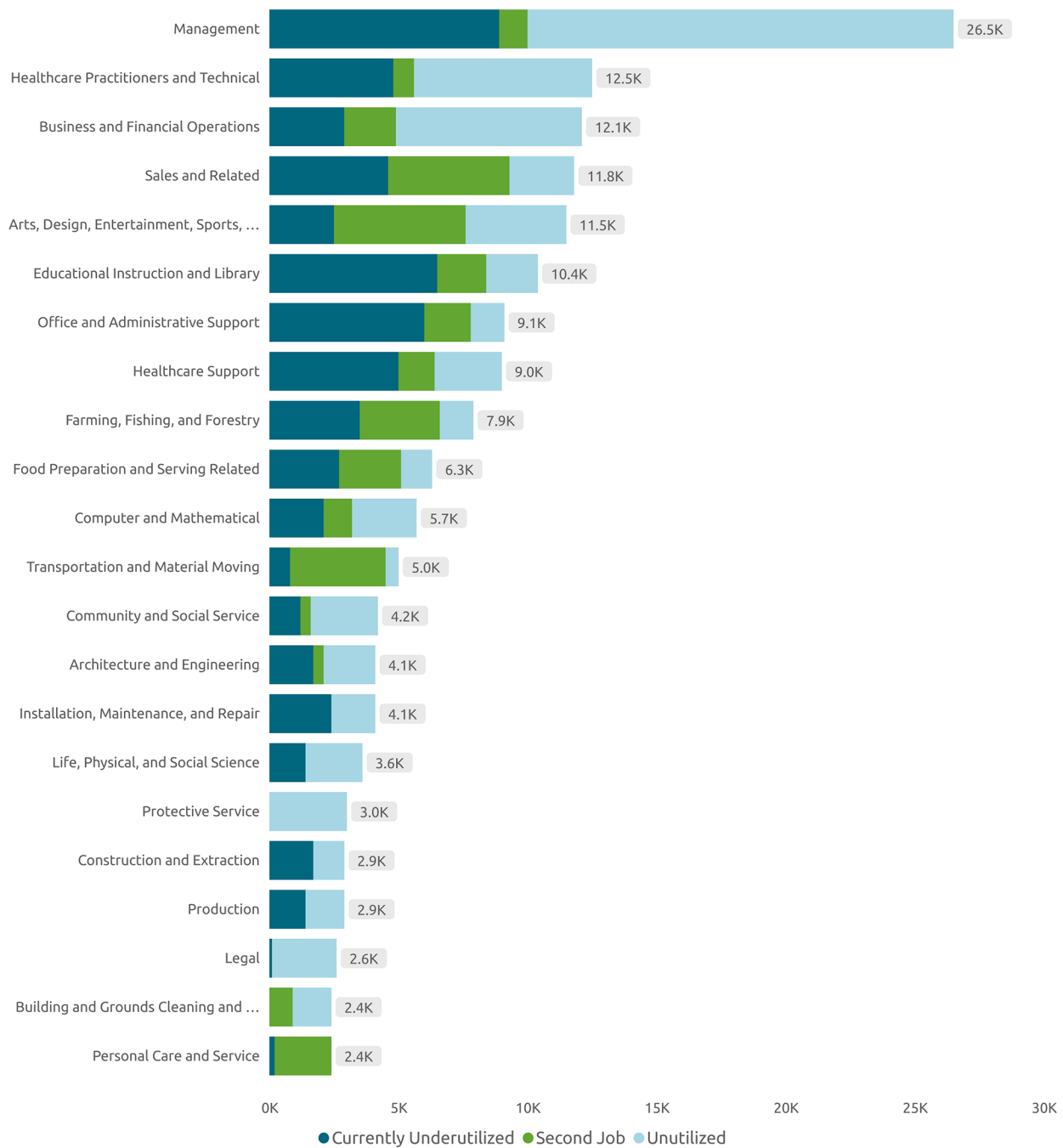
Among the Worker Available subset, 12 percent report having multiple jobs. Management occupations have the largest amount of untapped talent with 26,500 workers underutilized in their primary position, working part time in the occupation, or currently working in another field but with experience in Management.

Worker Available Work Experience

Occupational Classification	Primary	Secondary	Underutilized	Unutilized
Architecture and Engineering	6,000	400	1,700	2,000
Arts, Design, Entertainment, Sports, and Media	8,700	5,100	2,500	3,900
Building and Grounds Cleaning and Maintenance	4,000	900	-	1,500
Business and Financial Operations	20,800	2,000	2,900	7,200
Community and Social Service	7,700	400	1,200	2,600
Computer and Mathematical	10,200	1,100	2,100	2,500
Construction and Extraction	7,500	-	1,700	1,200
Educational Instruction and Library	22,700	1,900	6,500	2,000
Farming, Fishing, and Forestry	5,000	3,100	3,500	1,300
Food Preparation and Serving Related	10,200	2,400	2,700	1,200
Healthcare Practitioners and Technical	18,200	800	4,800	6,900
Healthcare Support	13,700	1,400	5,000	2,600
Installation, Maintenance, and Repair	9,800	-	2,400	1,700
Legal	1,700	-	100	2,500
Life, Physical, and Social Science	4,600	-	1,400	2,200
Management	47,300	1,100	8,900	16,500
Office and Administrative Support	25,900	1,800	6,000	1,300
Personal Care and Service	6,300	2,200	200	-
Production	11,500	-	1,400	1,500
Protective Service	3,800	-	-	3,000
Sales and Related	22,900	4,700	4,600	2,500
Transportation and Material Moving	9,900	3,700	800	500
Total Worker Available	279,600	33,000	60,500	56,100

- Too few sample observations were available to compute an estimate.

Worker Available Work Experience



This chart shows the same information as presented in the table on the previous page but in a graphical format, excluding those workers not underutilized in their primary occupation. The visual shows a good mix of current and related work experience across all occupations. Management (26.5k); Healthcare Practitioners and Technical (12.5k); and Business and Financial Operations (12.1k) represent the top three occupations with untapped potential with over twelve thousand workers in each occupation identified as underutilized in their primary job, working in the occupation solely as a second job, or not working in the occupation but have the ability and willingness to.

Student Debt

Student debt is a growing concern as is ensuring a well educated workforce; managing the two presents a challenge for our local and national economy. According to CNBC, 44 million people, roughly 70 percent of recent graduates, have an average debt load of \$37,172. It is for this reason that student debt is addressed in this study.

The Underemployed subset is much more likely (36 percent) than the rest of the Total Available workforce (21 percent) to report holding student debt.

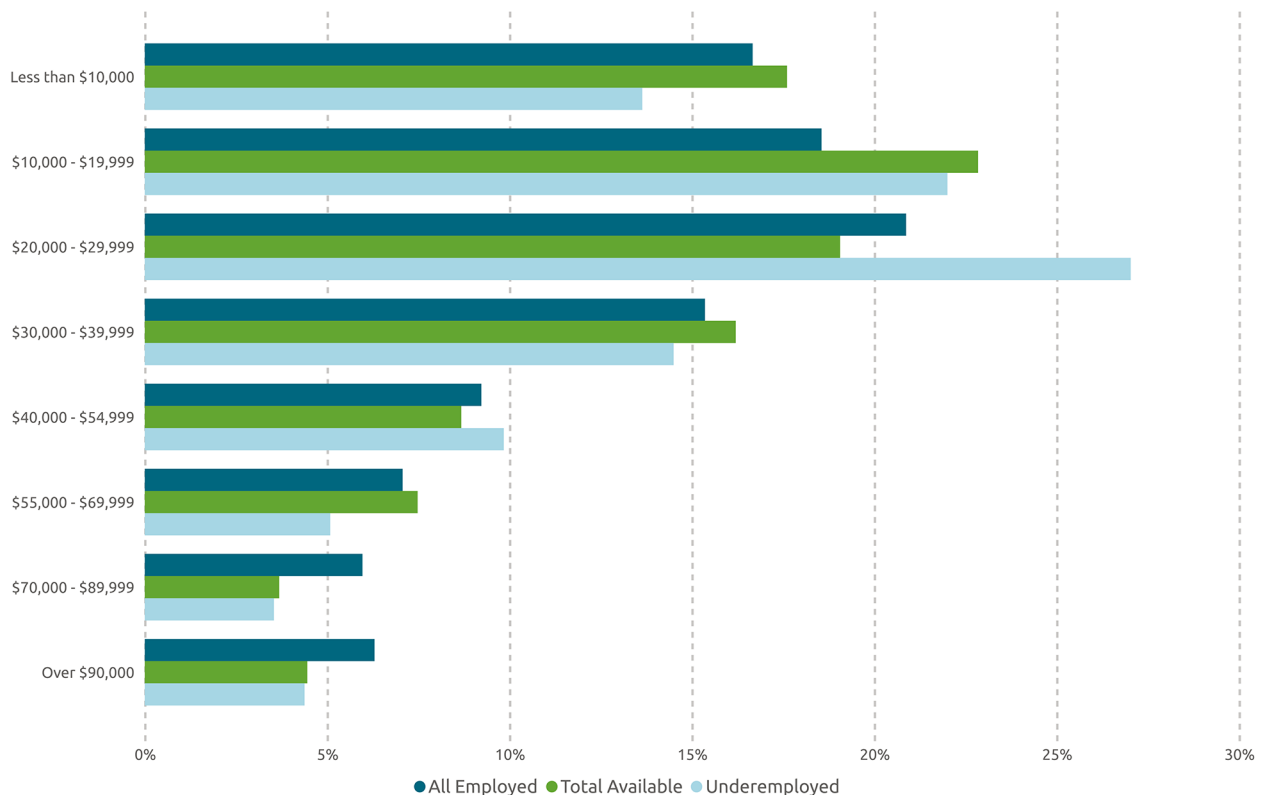
The data indicate that 30 percent of those 18-29 have student debt. This compares with 29 percent for the 30-54 subset and just 11 percent for those 55-69. However, those 55-69 who reported holding student debt reported a median debt amount of \$37,200, significantly higher than the median debt amounts for those age 18-29 (\$26,400) and 30-54 (\$22,500). Among those reporting over \$90,000 in debt, 89 percent report holding an advanced degree and 11 percent report holding a bachelor's degree.

Student Debt by Age Group

	18 - 29	30 - 54	55 - 69
Have Debt	30%	29%	11%
Debt Amount			
Less than \$10,000	14%	19%	26%
\$10,000 - \$19,999	21%	26%	13%
\$20,000 - \$29,999	23%	19%	-
\$30,000 - \$39,999	26%	8%	16%
\$40,000 - \$54,999	10%	8%	6%
\$55,000 - \$69,999	6%	5%	27%
\$70,000 - \$89,999	-	8%	-
Over \$90,000	-	6%	12%

- Too few sample observations were available to compute an estimate.

Student Debt Current and Total Available Workforce



This chart represents the percentage of each subset of Underemployed, Total Available workforce, and All Employed represented by each student debt range.

*<https://www.cnbc.com/2018/02/15/heres-how-much-the-average-student-loan-borrower-owes-when-they-graduate.html>

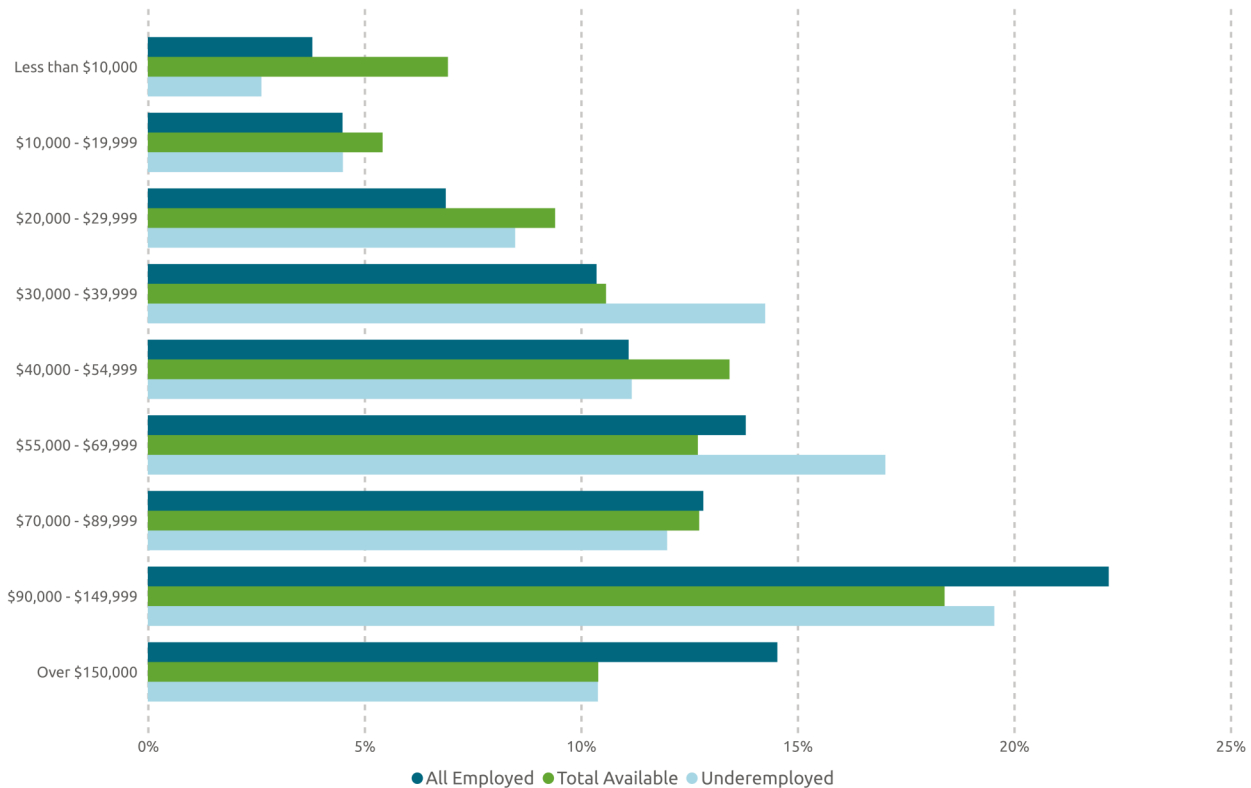
Household Income

The household income data show the younger 18-29 age group with 40 percent having household income of less than \$30,000 compared to the 30-54 age group's 13 percent and the 55-69 age group's 15 percent. For the 18-29 age group, just 11 percent have a household income over \$90,000, compared to 37 percent of the 30-54 age group and 38 percent of the 55-69 age group.

Household Income by Age Group

	18 - 29	30 - 54	55 - 69
Less than \$10,000	13%	4%	4%
\$10,000 - \$19,999	10%	4%	3%
\$20,000 - \$29,999	17%	5%	8%
\$30,000 - \$39,999	13%	10%	8%
\$40,000 - \$54,999	16%	15%	8%
\$55,000 - \$69,999	14%	11%	13%
\$70,000 - \$89,999	8%	14%	18%
\$90,000 - \$149,999	9%	23%	23%
Over \$150,000	2%	14%	15%

Household Income Current and Total Available Workforce



This chart represents the percentage of each subset of Underemployed, Total Available workforce, and All Employed represented by each household income range.

Worker Available Workforce

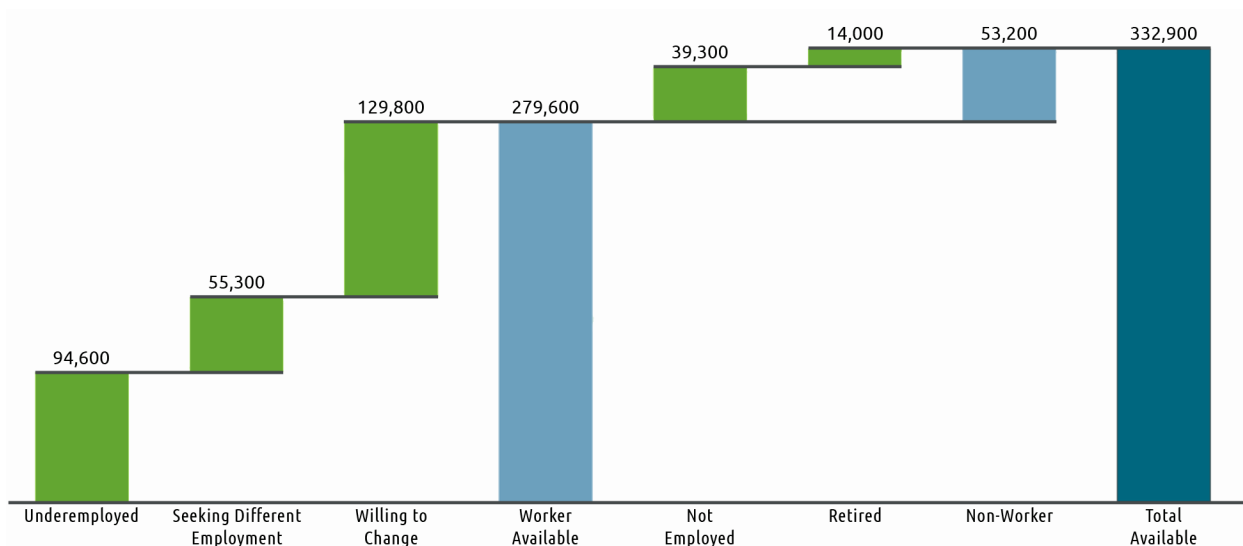
The willingness of the currently employed to change employment with the right opportunity is a key indicator in profiling the characteristics of the Total Available Workforce in the Area Labor Market. The employed individuals who are willing to change jobs with an existing or different employer represent the primary pool of the Total Available Workforce. The results of this workforce survey are that 76 percent of respondents identified themselves as part of the Total Available Workforce. Among the Total Available Workforce, 84 percent were working at the time they were contacted and are included in Worker Available subset with the other 16 percent included in Non-Worker Available subset.

Worker Available Breakout

Workforce Subset	Overall	Percent
Total Available Workforce	332,900	100%
Worker Available	279,600	84%
Underemployed	94,600	28%
Seeking Different Employment	55,300	17%
Willing to Change	129,800	39%

It is important to analyze each segment of respondents to identify and respect the differences and contributions to the ALM. Many factors must be considered when evaluating these workers, such as education, unused skills, wages and benefits desired, past experience, and the distance individuals are willing to travel to work. Within Worker Available, there are three subsets: those workers who are classified as Underemployed, those actively Seeking Different Employment, and those Willing to Change with the right opportunity. Respondents of these three subsets are counted only once as part of the Worker Available workforce.

Total Available Workforce Makeup



This waterfall chart shows the proportion of each subset in the Worker Available and Non-Worker Available workforces; additionally, the proportion of Worker Available and Non-Worker Available as subsets of Total Available Workforce are shown. This visualization aids in understanding the relative size of each subset of the Total Available Workforce. Underemployed, Seeking Different Employment, and Willing to Change are discussed in detail on the following pages.

Underemployed

The Underemployed subset is identified as those who believe they are currently underutilized in their jobs. This group is a primary source of good employees as these individuals are now working but desire a better job and also possess the skills, education, and experience to qualify for better jobs. They report to have additional education and/or job training; a previous job that required more skill and/or education; a current job that does not require the level of training and/or education attained; or a current job that is part-time when they desire full-time employment. The key to this definition is education, training, and/or experience. In addition, only those who have completed post-high school education are reported in the Underemployed subset. Current pay or part-time status alone is not a qualifying factor for underemployment status in this study.

The 94,600 in this group are included in the 279,600 members of the Worker Available workforce. Comparing this page and the two following, one can compare similarities and differences between the Underemployed, Seeking Different Employment, and Willing to Change subsets.

Age and Sex

The average age of this group is 39.5 years of age. The respondents are distributed among all age ranges: 18 to 29 (28 percent), 30 to 54 (53 percent), and 55 to 69 (19 percent). Males and females represent 44.2 percent and 55.8 percent respectively.

Education and Training

Forty-nine percent of the Underemployed subset have a Post-Secondary Certificate/Credential, Some College, or an Associate's degree, 34 percent hold a Bachelor's degree, and the remaining 17 percent have an advanced degree. This compares to 75 percent of the Total Available Workforce with post-high school education.

24 percent of the Underemployed subset indicated that access to Experience, Training, and Education is one of the top factors in accepting a new job. A higher salary is the most important factor (70.2 percent) followed closely by Health Benefits (69.7 percent).

Work Experience and Environment

To gain perspective on the types of workers available for new or different employment, survey respondents were asked to classify their occupations and industry experience as Goods Producing, Government/Education, and Services. While occupations may be similar in different industries, the focus of the work and work culture often varies significantly among different industries. 54 percent of the Underemployed subset are in the Services sector.

Workforce Characteristics

Workforce Characteristics	
Underemployed	94,600
Years on Job	10.0
Willing to Commute One Way	23.4
Current Average Wage	\$27.20
Desired Average Wage	\$33.40
Household Income	\$75,600
Average Age	39.5
Male/Female Ratio	44.2/55.8
Working Multiple Jobs	25%
Only Job Part Time or Temporary	16%
Have Health Insurance	94%
Access to Employer Health Insurance	75%
Access to Employer Retirement Benefit	60%

Education Attainment

Education Attainment	
Less than high school	0%
High school or equivalent	0%
Post-Secondary Certificate/Credential	14%
Some college or associate's degree	35%
Bachelor's degree	34%
Advanced degree	17%

By definition, those in the Underemployed subset must have some education beyond high school.

Primary Industry Sector

Primary Industry Sector	
Goods Producing	26%
Government/Education	20%
Services	54%

Seeking Different Employment

The Seeking Different Employment subset is identified as those who are currently employed, and actively looking to change jobs, but are not found to be Underemployed. The 55,300 in this subset are included in the 279,600 Worker Available workforce and are not counted twice. Compared to the Underemployed on the preceding page and the Willing to Change on the following page, the Seeking Different Employment have less years on the job, lower current and desired wages, lower household income, lower access to health insurance through an employer, a lower average age, and 56 percent have an employer sponsored retirement benefit.

Age and Sex

The mean age of this subset is 38.3 years of age. The respondents are distributed among all age ranges: 18 to 29 (32 percent), 30 to 54 (53 percent), and 55 to 69 (15 percent). Males are more strongly represented in this subset at 60.1 percent.

Education and Training

Just over half (54 percent) of the subset have post high school education and 27 percent have four-year degrees or higher. The Seeking Different Employment subset has the lowest education attainment level of all worker subsets.

Twenty percent of the Seeking Different Employment subset stated that working closer to home would be an important consideration in accepting a new job. When considering new employment, A higher salary is the most important benefit for this group (76 percent) followed by health benefits (65 percent).

Work Experience and Environment

To gain perspective on the types of workers available for new or different employment, survey respondents were asked to classify their occupations and industry experience as Goods Producing, Government/Education, and Services. While occupations may be similar in different industries, the focus of the work and work culture often varies significantly among different industries. 46 percent of those Seeking Different Employment are in the Services sector.

Workforce Characteristics

Seeking Different Employment	55,300
Years on Job	8.8
Willing to Commute One Way	24.3
Current Average Wage	\$24.60
Desired Average Wage	\$28.90
Household Income	\$73,500
Average Age	38.3
Male/Female Ratio	60.1/39.9
Working Multiple Jobs	16%
Only Job Part Time or Temporary	12%
Have Health Insurance	94%
Access to Employer Health Insurance	69%
Access to Employer Retirement Benefit	56%

Education Attainment

Less than high school	3%
High school or equivalent	43%
Post-Secondary Certificate/Credential	5%
Some college or associate's degree	22%
Bachelor's degree	14%
Advanced degree	13%

Primary Industry Sector

Goods Producing	35%
Government/Education	19%
Services	46%

Willing to Change

The Willing to Change subset is identified as those who are currently employed but are not actively looking to change jobs and are not found to be Underemployed. The 129,800 in this subset are included in the 279,600 Worker Available workforce and are the single largest subset of the Total Available Workforce.

Compared to the Underemployed and those Seeking Different Employment on the preceding pages, the Willing to Change subset enjoys the highest average years on the job, shortest commute, highest wages, highest household income, fewest number working multiple jobs, and the most employers offering health and retirement benefits. This subset has the highest desired wage when considering new employment.

Age and Sex

The mean age of this subset is 41.3 years. The respondents are distributed among all age ranges: 18 to 29 (31 percent), 30 to 54 (45 percent), and 55 to 69 (24 percent).

Education and Training

Seventy-two percent of the Willing to Change respondents in the ALM have some post high school education and 46 percent possess four-year degrees or higher. The Willing to Change subset has a slightly higher proportion of workers with an advanced degree (16 percent) compared to 14 percent in the Total Available Workforce.

18 percent of the Willing to Change respondents stated that experience, training, and educational opportunities would be an important consideration in accepting a new job. Salary (79%) and Health Care (67%) are the most important benefits for this subset when considering new employment.

Work Experience and Environment

To gain perspective on the types of workers available for new or different employment, survey respondents were asked to classify their occupations and industry experience as Goods Producing, Government/Education, and Services. While occupations may be similar in different industries, the focus of the work and work culture often varies significantly among different industries. 44 percent of those Willing to Change are in the Services sector.

Workforce Characteristics

Willing to Change	129,800
Years on Job	10.4
Willing to Commute One Way	22.9
Current Average Wage	\$32.90
Desired Average Wage	\$38.90
Household Income	\$83,100
Average Age	41.3
Male/Female Ratio	52.4/47.6
Working Multiple Jobs	14%
Only Job Part Time or Temporary	8%
Have Health Insurance	93%
Access to Employer Health Insurance	81%
Access to Employer Retirement Benefit	72%

Education Attainment

Less than high school	3%
High school or equivalent	25%
Post-Secondary Certificate/Credential	5%
Some college or associate's degree	22%
Bachelor's degree	30%
Advanced degree	16%

Primary Industry Sector

Goods Producing	26%
Government/Education	30%
Services	44%

Non-Worker Available Workforce

Relying solely on the unemployed workforce as determined by the Bureau of Labor Statistics (BLS) overlooks sources of potential labor like stay-at-home parents and retirees who would be willing to enter or reenter the workforce if the right opportunity arose. This study considers the Non-Worker Available workforce which includes two subsets: Not Employed and Retired.

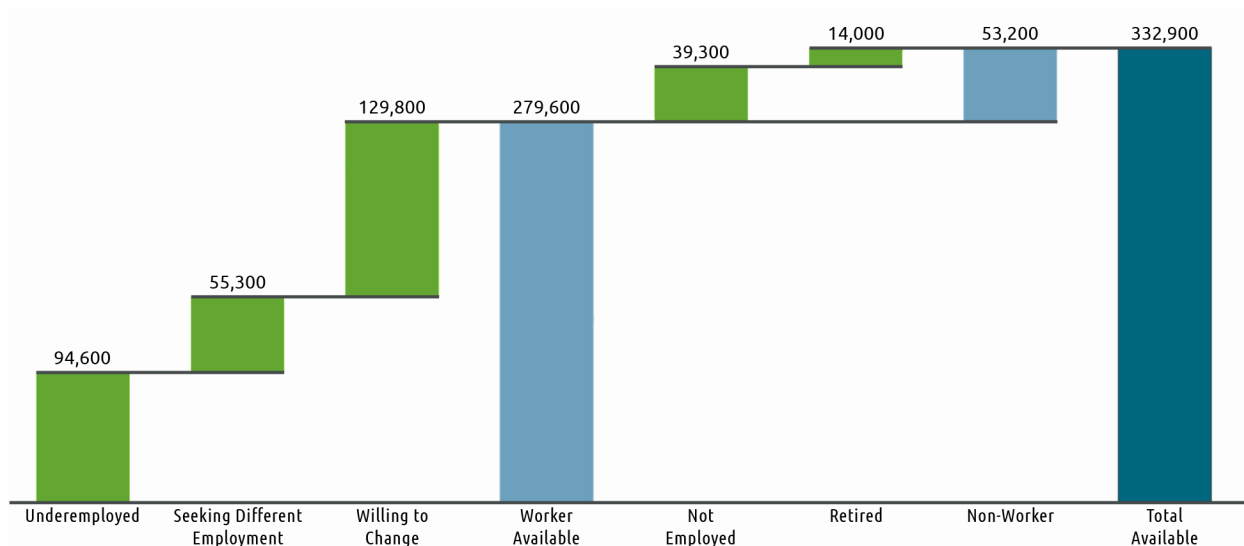
Non-Worker Available Breakout

Workforce Subset	Overall	Percent
Total Available	332,900	100%
Non-Worker Available	53,200	16%
Not Employed	39,300	12%
Retired	14,000	4%

Including these subsets in the analysis provides a more accurate assessment of the potential workforce in the area. Of the respondents surveyed, 16 percent stated they were Non-Working. By questioning these respondents about seeking employment or their willingness to accept an employment offer, the survey identified a population of approximately 53,200 who would enter the workforce for the right opportunity.

Analyzing the subsets exposes unique characteristics for better understanding the Non-Worker Available workforce. A further distinction in the non-working group are those actively seeking employment and those not actively seeking employment but willing to work or accept employment with the right opportunity includes wages, benefits, work culture, transportation, childcare, scheduling, etc.. The following sections provide a profile of the Not Employed and Retired subsets.

Total Available Workforce Makeup



This waterfall chart shows the proportion of each subset in the Worker Available and Non-Worker Available workforces; additionally, the proportion of Worker Available and Non-Worker Available as subsets of Total Available Workforce are shown. This visualization aids in understanding the relative size of each subset of the Total Available Workforce. Not Employed and Retired are discussed in detail on the following pages.

Not Employed

Of those who responded who are Not Employed, 49 percent are actively seeking employment. It is estimated that 19,900 are willing to return to work only if presented with the right opportunity. The following tables provide the general characteristics of this subset.

Age and Sex

The average age of this group is 33.2 years of age. The respondents are distributed among all age ranges: 18 to 29 (54 percent), 30 to 54 (37 percent), and 55 to 69 (9 percent). Males make up 32.7 percent and females 67.3 percent seeking or willing to accept employment.

Education and Training

Forty-two percent of the Not Employed respondents in the ALM have some post-high school education. In comparing the Not Employed subset to other subsets, the Not Employed tend to be some of the least educated with only 32 percent having some college compared to the Total Available Workforce population at 66 percent and only 2 percent possessing an advanced degree compared to the Total Available Workforce average of 14 percent.

Reason Not Employed

Of those identified as Not Employed, 16 percent stated that it was due to a disability. Fourteen percent (5,600) of those in this subset attribute their Non-Worker status to the Covid-19 pandemic.

Reason Can't Find Job

Job availability is a significant barrier for this subset (32 percent) when seeking employment. Three percent cited children being home due to virtual schooling as a barrier to gaining employment.

Workforce Characteristics

Not Employed	39,300
Seeking Employment	19,400
Willing to Commute One Way	19.7
Desired Average Wage	\$19.60
Household Income	\$35,000
Average Age	33.2
Male/Female Ratio	32.7/67.3
Have Health Insurance	71%

Education Attainment

Less than high school	8%
High school or equivalent	50%
Post-Secondary Certificate/Credential	10%
Some college or associate's degree	22%
Bachelor's degree	8%
Advanced degree	2%

Reason Not Employed

Direct Result of Covid-19 Pandemic	14%
Primary Reason	
Disabled	16%
Other Income/Pension	14%
Major Layoff or Workplace Closing	11%
Full-Time Student	11%
Fired/Released	11%
Never Employed	2%
Other/Prefer Not to Say	34%

Primary Factors Preventing Employment

Not Interested/Other	37%
Job Availability	32%
Transportation	25%
Lack College Degree	21%
Lack Necessary Skills	19%
Child Care	17%
Lack Industry Certification/Credential	11%
Compatibility/Personality	9%
Lack of High School Diploma	6%
Children Home due to Virtual Schooling	3%

Multi-select options, percentages will not total to 100%

Retired

Of those who indicated they are Retired, it is estimated that 12,600 are willing to enter or return to work only if presented with the right opportunity; just 10 percent are actively seeking employment.

This subset represents a significant pool of experienced and educated workers but also higher opportunity costs to draw them back in the labor market. The Retired subset has the second-highest desired wage at \$36.40 (second to Willing to Change at \$38.90).

Age and Sex

The mean age of this group is 62.5 years of age. Males make up 51.6 percent and females 48.4 percent of the Retired subset.

Education and Training

Seventy-nine percent of the Retired subset have some post-high school education with 37 percent possessing four-year degrees or higher.

The most important benefit for those in the Retired group was flexible hours, given by 72 percent of respondents.

Age 70-84

An additional cohort, those age 70 to 84, was sampled as part of this study. The Age 70-84 cohort is excluded from all other portions of this study but a summary of the cohort is provided here.

Among the 61,700 Census 70-84 Population, 26 percent (16,100) are identified as an Available Workforce. Most members of this Available Workforce (87 percent) are retired but indicate they are willing to accept employment for the right opportunity.

The remaining 45,600 members (74 percent) of the Census 70-84 Population are classified as Unavailable. This population consists of 41,800 (92 percent) who are retired and unwilling to reenter the workforce as well as 3,800 workers (8 percent) who are currently employed but unwilling to change jobs—the Worker Satisfied subset. Ninety percent of those Age 70-84 who are not working identify Pension/Other Income as the primary reason.

Workforce Characteristics

Retired	14,000
Seeking Employment	1,400
Willing to Commute One Way	17.6
Desired Average Wage	\$36.40
Household Income	\$55,300
Average Age	62.5
Male/Female Ratio	51.6/48.4
Have Health Insurance	95%

Education Attainment

Less than high school	0%
High school or equivalent	21%
Post-Secondary Certificate/Credential	15%
Some college or associate's degree	27%
Bachelor's degree	25%
Advanced degree	12%

Age 70-84 Population

Subset	Overall	Percent
Population		
Census 70-84 Population	61,700	100%
Census 70-84 Male Population	27,900	45.2%
Census 70-84 Female Population	33,800	54.8%
70-84 Available Workforce		
Available Workforce	16,100	100%
Worker Available	2,200	13%
Non-worker Available	13,900	87%
70-84 Unavailable		
Unavailable Population	45,600	100%
Retired	41,800	92%
Worker Satisfied	3,800	8%

Sources: Census and Bureau of Labor Statistics (BLS) Population and Labor Force Estimates

Desired Wages and Benefits

Salary, health benefits, and work/life balance rank highest across all subsets in the Total Available Workforce when considering an opportunity for new employment. While wage and benefit costs are important for employers when assessing a workforce market, of equal or greater importance is the quality and availability of the necessary skills and talent of the labor force. The greater the quality and availability of the skills and talent for increased productivity, the more likely higher wages and benefits will follow. Competitiveness in the global economy means producing goods and services competitive in price and quality in the market place.

Desired Benefits

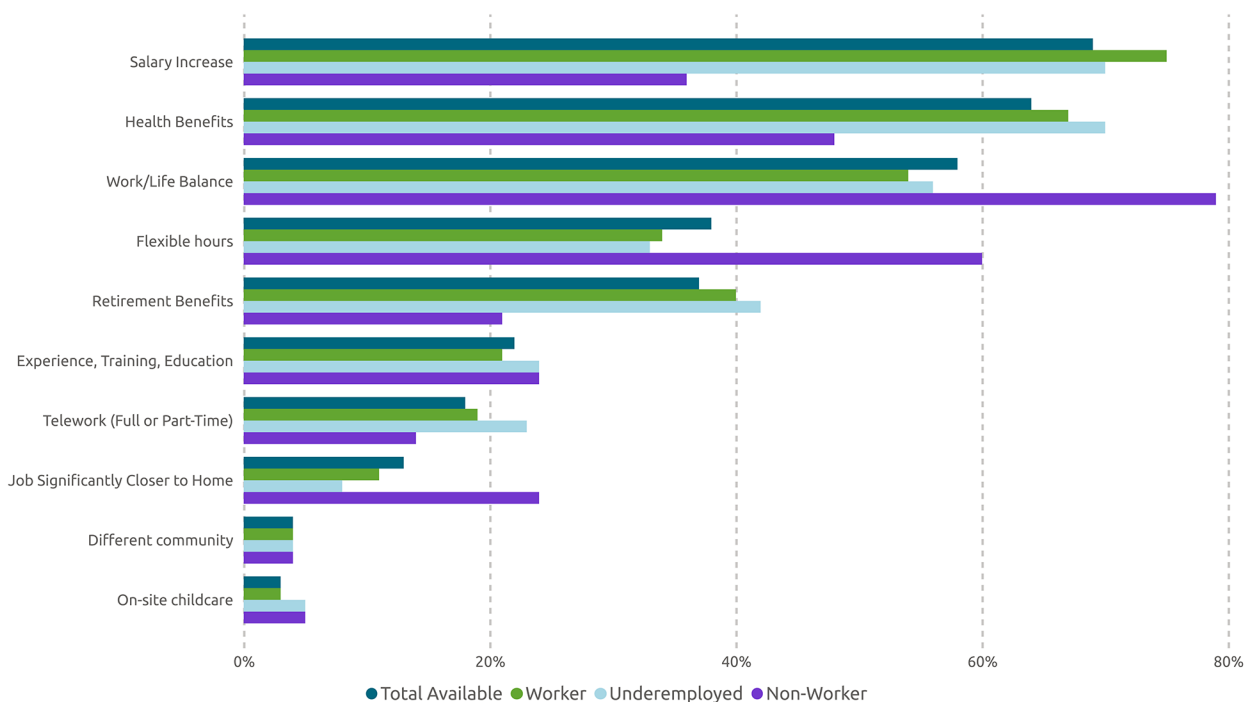
Salary and health benefits were the top two motivators for changing jobs among all Worker Available subsets. The Non-worker Available subset places high value on work/life balance and flexible hours. These benefits present an opportunity for employers to differentiate themselves.

Desired Benefits by Subset

Desired Employer Benefit	Total Available	Worker	Under-employed	Non-Worker
Salary Increase	69%	75%	70%	36%
Health Benefits	64%	67%	70%	48%
Work/Life Balance	58%	54%	56%	79%
Flexible hours	38%	34%	33%	60%
Retirement Benefits	37%	40%	42%	21%
Experience, Training, Education	22%	21%	24%	24%
Telework (Full or Part-Time)	18%	19%	23%	14%
Job Significantly Closer to Home	13%	11%	8%	24%
Different community	4%	4%	4%	4%
On-site childcare	3%	3%	5%	5%

*Multi-select options, percentages will not total to 100%

Available Workforce Desired Benefits



Desired Wage Rate Ranges

All wage and salary requirements expressed by respondents are presented in hourly rates. Appendix A presents an easy conversion table to annual, monthly, or weekly rates. Just four percent of the Total Available Workforce would be interested in employment with wages between \$12.00 and \$13.99 per hour. It is estimated that 182,800 people or 55 percent of the Total Available Workforce would be interested in new or different employment with a wage of up to \$27.99; 29 percent would require \$36.00 or more for a new job opportunity.

Total Available Workforce Desired Wage

Subset	Workforce	Average Desired Wage
Total Available Workforce	332,900	\$33.20
Worker Available	279,600	\$35.10
Underemployed	94,600	\$33.40
Seeking Different Employment	55,300	\$28.90
Willing to Change	129,800	\$38.90
Non-worker Available	53,200	\$23.90
Not Employed	39,300	\$19.60
Retired	14,000	\$36.40

By comparing desired wage rates by workforce and subset, the various preferences are more evident. Those that currently hold jobs (Worker Available) report a desired wage in a new position 47 percent higher than that of the Non-Worker Available workforce.

Beginning in 2023, Missouri's minimum wage will increase to \$12.00 per hour. To account for this change, the minimal responses that indicated a desired wage of less than \$12.00 an hour have been included in the \$12.00-\$13.99 wage range for this study.

Desired Wage Rate by Available Workforce Subset

	Total		Worker		Underemployed		Non-Worker	
	Available Workforce	Percent	Available Workforce	Percent	Available Workforce	Percent	Available Workforce	Percent
\$12.00 - \$13.99	14,300	4%	8,200	3%	2,300	2%	6,000	11%
\$14.00 - \$15.99	30,700	9%	15,300	5%	6,600	7%	15,400	29%
\$16.00 - \$17.99	23,200	7%	17,900	6%	8,200	9%	5,300	10%
\$18.00 - \$19.99	18,100	5%	16,100	6%	6,500	7%	2,100	4%
\$20.00 - \$23.99	49,900	15%	40,100	14%	13,100	14%	9,800	18%
\$24.00 - \$27.99	46,600	14%	38,900	14%	12,100	13%	7,700	14%
\$28.00 - \$31.99	36,500	11%	34,600	12%	10,200	11%	1,900	4%
\$32.00 - \$35.99	16,900	5%	16,900	6%	7,100	7%	-	-
\$36.00 - \$39.99	26,300	8%	26,300	9%	9,200	10%	-	-
\$40.00 - \$49.99	29,000	9%	25,900	9%	10,600	11%	3,000	6%
\$50.00 or More	41,500	12%	39,400	14%	8,600	9%	2,100	4%
Total:	332,900	100%	279,600	100%	94,600	100%	53,200	100%

- Too few sample observations were available to compute an estimate.

Desired Wage Rate By Industry and Occupation

The Goods Producing industry sector has the highest desired wage of \$40.30 with the Services sector reporting the lowest at \$33.30 per hour.

The management occupation group has the highest desired wage at \$42.40 and those in the Non-Worker workforce have the lowest at \$23.90.

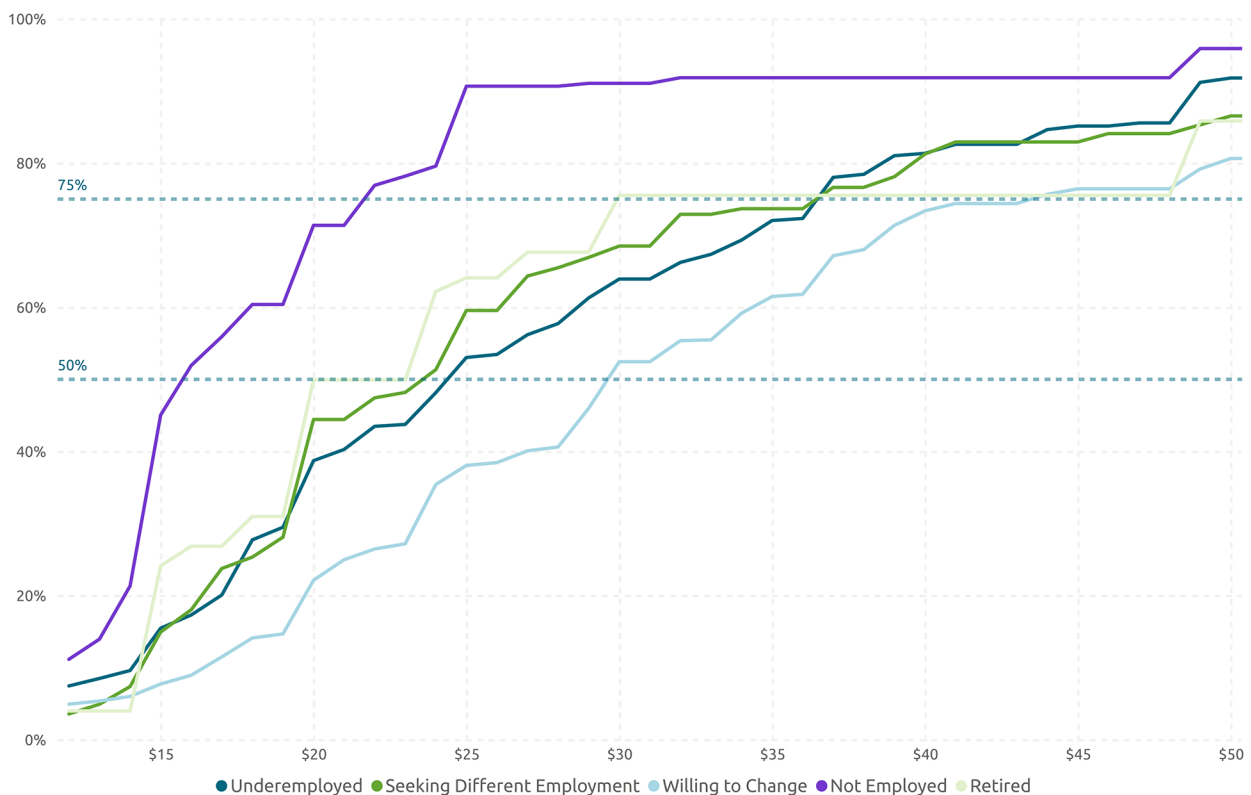
Desired Wage Rate by Industry

Goods Producing	\$40.30
Government/Education	\$35.20
Services	\$33.30

Desired Wage Rate by Occupation

Management	\$42.40
Production/Repair/Installation	\$34.70
Professional/Technical	\$41.50
Services	\$28.40
Non-Worker Available	\$23.90

Desired Wage Rate by Percent of Available Workforce



The higher the wage (x axis), the higher the percentage of the population that would take that wage (y axis). About 50 percent of the Worker Available workforce would be satisfied with \$27.00 an hour or less and about 75 percent of the Worker Available workforce would be satisfied with \$39.00 an hour or less. Among the Non-worker Available workforce, about 50 percent would be satisfied with less than \$18 and 75 percent with \$24 or less.

Occupation Current and Desired Wages

The following table provides a detailed analysis of the Total Available workforce by occupation, average current wage, and average desired wage. Comparing the current average wage with the desired wage shows the expectations of the Total Available Workforce in accepting a new job. The Professional/Technical occupation clusters indicated the lowest desired wage increase (16.2 percent) compared to the Worker Available workforce (19.8 percent); those in the Services occupation clusters have the highest desired wage increase (25.1 Percent) driven by a 45.2 percent increase among the Food Preparation and Service occupations.

Three occupation groups: Computer and Mathematical; Arts, Design, Entertainment, Sports, and Media; and Healthcare Support all report a disparity of more than \$8.00 between their current and desired wages. Additionally, the occupation groups: Food Preparation and Serving; Educational Instruction and Library; Arts, Design, Entertainment, Sports, and Media; and Healthcare Support all report a desired increase of over 30 percent. These groups are likely to be motivated by new opportunities with higher salaries.

Occupation Current and Desired Wages

	Available Workforce	Average Current Wage	Average Desired Wage	Desired Increase
Management	45,500	\$36.10	\$42.40	17.50%
Management	45,500	\$36.10	\$42.40	17.50%
Production/Repair/Installation	31,400	\$24.90	\$29.70	19.30%
Building and Grounds Cleaning and Maintenance	3,800	\$16.50	\$20.40	23.60%
Construction and Extraction	7,400	\$26.90	\$32.00	19.00%
Installation, Maintenance, and Repair	9,100	\$28.90	\$34.70	20.10%
Production	11,000	\$23.60	\$27.60	16.90%
Professional/Technical	86,900	\$35.80	\$41.60	16.20%
Architecture and Engineering	6,000	\$63.30	\$67.10	6.00%
Business and Financial Operations	20,000	\$35.50	\$41.20	16.10%
Computer and Mathematical	9,500	\$43.90	\$52.80	20.30%
Educational Instruction and Library	22,600	\$23.10	\$30.80	33.30%
Healthcare Practitioners and Technical	17,800	\$30.30	\$34.30	13.20%
Legal	1,700	\$40.50	\$44.00	8.60%
Life, Physical, and Social Science	4,400	\$75.70	\$78.20	3.30%
Protective Service	3,800	\$23.00	\$28.50	23.90%
Services	107,600	\$22.70	\$28.40	25.10%
Arts, Design, Entertainment, Sports, and Media	8,600	\$26.50	\$34.90	31.70%
Community and Social Service	7,500	\$21.70	\$24.60	13.40%
Farming, Fishing, and Forestry	5,000	\$36.90	\$41.20	11.70%
Food Preparation and Serving Related	10,200	\$13.50	\$19.60	45.20%
Healthcare Support	13,500	\$25.60	\$33.70	31.60%
Office and Administrative Support	25,200	\$21.60	\$27.90	29.20%
Personal Care and Service	6,100	\$16.50	\$20.40	23.60%
Sales and Related	21,900	\$24.00	\$29.60	23.30%
Transportation and Material Moving	9,600	\$22.80	\$25.90	13.60%
Non-Worker Available	51,400	N/A	\$23.90	N/A
Non-Worker Available	51,400	N/A	\$23.90	N/A

Commuting Patterns and Career Preferences

The preferred commute of the Worker Available workforce in the Area Labor Market is 23.3 miles one way. The overall commute preference of the Total Available Workforce is 22.7 miles one way. In general, the Total Available Workforce indicates it is open to commuting for the right employment opportunity and the table shows 263,700 people or 79 percent of the Total Available Workforce would commute more than 10 miles each way for work. It also shows that 83,300 people or 25 percent of the Total Available Workforce are willing to travel more than 30 miles and 16,300 people, 5 percent, will commute more than 50 miles.

Willingness To Commute By Available Workforce Groups

Where individuals live within the ALM will influence their desire to commute to work. The transportation routes and options to employment centers also have a big influence over where people work. Individuals from communities surrounding larger cities seeking job opportunities and competitive wages/benefits understand the fact that they will have to commute some distance to a new employer.

The Preferred Commute by Subset table illustrates the different commuting preferences of those who are employed as well as those not employed. Those who are employed (Worker Available) show a willingness to commute 22.9-24.3 miles each way to work. The Non-Worker Available subset shows a lower willingness to travel, 19.2 miles for the subset.

The Non-Worker Available workforce prefers a shorter commute but also are more open to part-time and more flexible work arrangements. In general, Retired workers are not as willing to commute long distances to work; however, those in the ALM are willing to travel 17.6 miles for the right employment opportunities.

There are 29,600 workers in the Worker Available workforce that work outside the Missouri Northeast ALM. Of this number, 57 percent are identified as Willing to Change, 25 percent as Underemployed, and the remaining 18 percent are Seeking Different Employment.

Preferred Commute by Distance

Distance	Workforce	Percent
Less than 10 miles	69,100	21%
10 - 30 miles	180,400	54%
31 - 50 miles	67,000	20%
51+ miles	16,300	5%

Preferred Commute by Subset

Subset	Distance
Total Available	22.7
Worker Available	23.3
Underemployed	23.4
Seeking Different Employment	24.3
Willing to Change	22.9
Non-Worker Available	19.2
Not Employed	19.7
Retired	17.6

Preferred Commute by Occupation

Group	Distance
Management	26.1
Production/Repair/Installation	27.7
Professional/Technical	23.1
Services	21.0
Non-Worker Available	19.2
Overall Average	22.7

Preferred Commute by Industry

Industry	Distance
Goods Producing	27.0
Government/Education	22.7
Services	21.5

Worker Primary Interest

There are four broad categories of interest when working: people, data, things, and ideas. Most people have preference for one, but the majority of workers are adaptable to all four. A primary interest in one of the four may be an indicator of success in certain occupations. A stronger interest in people or ideas may lead to occupations in management and services. An interest in working with things may point to occupations in Production. Professional/Technical may require a stronger interest in data and analytical skills. The survey results show interest in People with 47 percent, Things with 20 percent, Data with 22 percent, and Ideas with 12 percent.

Primary Work Interest by Available Workforce Subset

	People		Things		Data		Ideas	
	Workforce	Percent	Workforce	Percent	Workforce	Percent	Workforce	Percent
Total Available	155,500	47%	67,500	20%	69,100	22%	40,800	12%
Worker Available	131,700	40%	57,600	17%	58,200	17%	32,100	10%
Underemployed	47,400	14%	14,200	4%	20,200	6%	12,800	4%
Seeking Different Employment	26,200	8%	14,900	4%	9,100	3%	5,000	1%
Willing to Change	58,000	17%	28,500	9%	28,900	9%	14,300	4%
Non-Worker Available	23,800	7%	9,800	3%	10,900	3%	8,700	3%
Not Employed	18,500	6%	8,000	2%	5,200	2%	7,700	2%
Retired	5,400	2%	1,900	1%	5,700	2%	1,000	0%

Changing Primary Employment Field

It is usually easier to change from one major industry group to another than it is from one primary occupation field to another. While skills and occupation may be similar in the different industry groups, individual worker's attitudinal characteristics, sometimes known as soft skills, may be more important to workers and employers where the focus is on people and customer service vs. systems and process. There may also be differences in wages and benefits and other work-related characteristics between industry types.

For many individuals, changing jobs to another employment field may not be something they are willing to do. The adaptability and flexibility of the workforce is important in the creation of new jobs and may require job training and other types of programs where jobs disappear because of competition, technology, or global pandemic. If a large percentage of those employed and non-employed are unwilling to change their occupations or job positions, it could limit the type of employer who can enter the area labor market.

The table to the right shows that the Total Available Workforce in the Missouri Northeast ALM is willing to change their occupation or job position for the right opportunity. The willingness of each subset of the Total Available workforce is provided.

Willing To Change Primary Occupation or Industry

Subset	Available Workforce	Willing To Change Occupation		Willing To Change Industry	
Total Available	332,900	286,100	86%	285,500	86%
Worker Available	942,100	238,500	85%	239,100	86%
Underemployed	94,600	88,100	93%	86,400	91%
Seeking Different Employment	55,300	50,600	92%	51,800	94%
Willing To Change	129,800	99,900	77%	100,900	78%
Non-Worker Available	53,200	47,600	89%	46,400	87%
Not Employed	39,300	34,200	87%	33,500	85%
Retired	14,000	13,400	96%	12,900	92%

Workforce Health and Covid-19 Impact

Workforce Impact

Fourteen percent of the Not Employed subset of the Non-Worker Available workforce indicate that they are not working as a direct result of Covid-19. 3 percent of the Not Employed subset ranked Children Home due to Virtual Schooling as one of the primary factors preventing them from finding a job.

Teleworking

Workers reported that 16 percent of employers added or expanded telework options as a result of Covid-19. Further, 12 percent of workers report that they began teleworking as a result of the pandemic and 50 percent of them expect to continue teleworking long-term. These new teleworkers join the 6 percent of the workforce that reports teleworking prior to the pandemic to make a combined 12 percent of the post-pandemic workforce that expects to telework.

Job Loss

Of the 83,600 members of the Non-Worker population (whether Available or not), 7,900 (9 percent) are identified as currently not employed as a direct result of Covid-19. Forty-seven percent (3,700) cite a major layoff, workplace closing, or other termination as the specific reason for not being employed.

Health Insurance Coverage

The Worker Unavailable subset indicates the highest overall level of health insurance coverage (96 percent), indicating a strong correlation between worker satisfaction and availability of health insurance coverage. Conversely, the Not Employed subset reported the lowest levels of coverage (77 percent) among all worker groups, highlighting the workforce's dependance on employers for health insurance.

Workers also place a strong emphasis on health insurance as a desired benefit with 64 percent of the Total Available Workforce ranking health insurance a top consideration when seeking new employment opportunities, second only to salary. Among those who did not rank health benefits as a top consideration for employment, 78 percent currently receive health insurance from a source other than their employer such as Medicare or a family member's plan.

Telework Options

Telework Changes	
Added	8%
Expand	8%
Remained the Same	4%
Not Offered	80%

Telework Adoption

Telework Status	
Already Teleworked	6%
Began Teleworking and Will Continue	6%
Began Teleworking but Will Return to Office	6%
Do Not Telework	82%

Health Insurance Coverage

Workforce Subset	Population	% With Health Insurance
Total Census 18-69 Population	442,400	92%
Available Workforce	332,900	91%
Worker Available	279,600	94%
<i>Underemployed</i>	94,600	94%
<i>Seeking Different Employment</i>	55,300	94%
<i>Willing to Change</i>	129,800	93%
Non-worker Available	53,200	77%
<i>Not Employed</i>	39,300	71%
<i>Retired</i>	14,000	95%
Unavailable Workforce	108,000	95%
Worker Unavailable	77,600	96%
Non-Worker Unavailable	30,400	92%

Health Insurance Source

Insured	
Employer Plan	51%
Family Member's Plan	20%
Government (Medicaid/Medicare)	14%
Healthcare.gov	7%
Uninsured	8%
No Access to Plan	5%
Do Not Want	3%

Conclusion

This study assesses the supply side of labor and provides information for the Missouri Northeast Area Labor Market about commuting patterns, current and desired wages, worker occupation and industry, experience, and education. The Total Available Workforce is determined from the Workers and Non-Workers perspective and provides information for the supply side of labor markets. The demand side is determined from the employer's perspective and provides information about the skills, quality, and availability of the labor force.

While considerable information is available surrounding workforce issues at the national level, less information is available at the local and regional levels, resulting in inadequate data to make objective decisions. Moreover, the impact of the Covid-19 pandemic on the global workforce has been significant and renders most previous workforce data obsolete. While employers are concerned about over-employment and workers with deficient skills or who are otherwise under-qualified, the workforce and community are concerned about underemployment and workers who have excess skills who are over-qualified for their jobs and present opportunities for expansion and new investments. Although the dynamics of the workplace have changed due to the Covid-19 pandemic, employers will continue to recruit the best employees with the best skills for the best value and workers will continue to seek the best jobs with the best compensation package and work environment. The balance for a competitive workforce is critical with the employer, community, education, and worker all having a major stake in developing a skilled and productive workforce with a goal of a just-in-time skill and talent pool to meet demand.

With increasing workforce challenges for the future anticipated from demographic changes in an aging population, the question of a more active approach to increasing the labor pool with productive workers is crucial. Weighing the cost for education and other programs with the social and economic benefits will be key in remaining competitive in a global economy.

Appendices

Appendix A-Wage and Salary Conversion Rates

The following data represents pay rates in four different ways. All wage and salary data collected during this study are presented in this report as hourly rates. Selected conversions may add perspective to the hourly rates. Figures presented below are rounded and based on a 40-hour workweek.

Wage and Salary Conversion Chart			
Hourly	Weekly	Monthly	Annually
\$8	\$320	\$1,387	\$16,640
\$9	\$360	\$1,560	\$18,720
\$10	\$400	\$1,733	\$20,800
\$11	\$440	\$1,907	\$22,880
\$12	\$480	\$2,080	\$24,960
\$13	\$520	\$2,253	\$27,040
\$14	\$560	\$2,427	\$29,120
\$15	\$600	\$2,600	\$31,200
\$16	\$640	\$2,773	\$33,280
\$17	\$680	\$2,947	\$35,360
\$18	\$720	\$3,120	\$37,440
\$19	\$760	\$3,293	\$39,520
\$20	\$800	\$3,467	\$41,600
\$21	\$840	\$3,640	\$43,680
\$22	\$880	\$3,813	\$45,760
\$23	\$920	\$3,987	\$47,840
\$24	\$960	\$4,160	\$49,920
\$25	\$1,000	\$4,333	\$52,000
\$26	\$1,040	\$4,507	\$54,080
\$27	\$1,080	\$4,680	\$56,160
\$28	\$1,120	\$4,853	\$58,240
\$29	\$1,160	\$5,027	\$60,320
\$30	\$1,200	\$5,200	\$62,400
\$31	\$1,240	\$5,373	\$64,480
\$32	\$1,280	\$5,547	\$66,560
\$33	\$1,320	\$5,720	\$68,640
\$34	\$1,360	\$5,893	\$70,720
\$35	\$1,400	\$6,067	\$72,800
\$36	\$1,440	\$6,240	\$74,880
\$37	\$1,480	\$6,413	\$76,960
\$38	\$1,520	\$6,587	\$79,040
\$39	\$1,560	\$6,760	\$81,120
\$40	\$1,600	\$6,933	\$83,200
\$41	\$1,640	\$7,107	\$85,280
\$42	\$1,680	\$7,280	\$87,360

Appendix B-Methodology

A primary goal of any Area Labor Market (ALM) or labor shed analysis is to estimate the potential availability of workers and determine how well the surrounding geographical areas are able to provide a stable supply of workers to the central focused core of the ALM or labor shed.

A key source of good employees is the category of the underemployed, those individuals who are now working but desire a better job and who possess the skills, education, and experience to qualify for better jobs. Underemployment or underutilization of skills or experience is a significant issue in many communities and is an important element for employers assessing a community for location or expansion. The availability of a highly skilled and experienced labor is among the top three important location factors for businesses considering expansions or relocations (Area Development Annual Surveys).

The key advantage of an Area Labor Market (ALM) analysis is that it expands the pool of potential workers by including workers excluded from the Civilian Labor Force (CLF). It also allows researchers to examine those individual members of the ALM pool who have a propensity to consider a job opportunity given their employment expectations. Employers evaluating the labor component are also more likely interested in the population age segment 18-69 than in the CLF representing the civilian non-institutional population, 16 years of age and over classified as employed or unemployed. Even with those restrictions, employers should note that, in practice, not all members of the available labor would apply for a new job opportunity. The reader is further cautioned that, while the number of workers identified as available with their skills, experience, education, and costs as accurate, all of those individuals may not be acceptable candidates for an employer. Their previous work records, stability, integrity, intelligence, appearance, and other factors are not considered in this report.

Published government statistics report wages and employment for the entire labor of an area, even though most of that labor has no interest in changing jobs. This report, prepared by Growth Services Group (GSG), includes data on those people in the area who desire to change jobs and who would be potential workers of employers with the right opportunity. Whereas, the BLS reports average wages, this report provides the number of available workers for an employer in various desired wage ranges. It includes the unemployed who are actively looking for work as well as those who would enter the labor under the right conditions or opportunities including homemakers, and retirees.

The labor analysis will start with a focus on a state, community, county, or multi-county area to determine the boundaries for the area to be assessed. It can also decide to quantify those outside the Core willing to change jobs and to commute and work in the central core area.

A random residential survey is conducted within the Area Labor Market (ALM). The survey is designed by Growth Services Group (GSG) and conducted by use of social media targeted marketing. The overall goal of the process is to collect a sufficient number of valid surveys completed by respondents 18 to 69 years of age. Validity of a sufficient number of survey results to a confidence of +/-5 percent is necessary with query or drill down validity of +/-10-15 percent. To ensure that an even distribution of respondents is achieved, a proportional number of completions are conducted by population, age segments, and sex.

The survey is approved by the client, employers, or Economic Development organization and can be customized as needed. Survey questions determine the respondents' sex, age, education level, place of residence, and current employment status. Employed respondents also identify the location of their employer (not name), place of work, employer type by industry, occupation, years of employment in their occupation, employment status, current salary or wage, number of jobs currently held, and distance traveled to work. Employed respondents are then asked how likely they are to change employers or employment, how far they would be willing to travel for employment, the wage desired for them to change employment, and the benefits required for new employment. Underemployment is determined by examining those employees who stated they possessed experience and additional education/skills that are not utilized in their current position.

Respondents in the 18-69 year age range self-identifying themselves as working, unemployed, homemaker, retired, military or student are asked a series of questions to determine what job characteristics and benefits were most important for them when considering employment, the reasons for unemployment, and how far they would be willing to travel to accept employment. Information on previous employers and skills is also gathered for these sectors. The employer type groups employers into three main categories by Goods Producing, Service Providing, and Government/Education. This allows employers evaluating the labor to view occupations from a work culture perspective as well as skills and experience. Once completed, the results of the survey are compiled and queried or cross-tabulated to determine the relationship between the variables of the core central area, the outside surrounding core ALM, and the entire surveyed ALM. Documenting and analyzing the ALM survey results by area and characteristics, provides new insight into the area's available labor that is currently unavailable in any other form.

A final note, prior to data processing, the GSG applies a proprietary process to the analysis of the data to correct for invalid responses. An individual indicating they would take a new job but also indicating the desire for increased or decreased pay that is unreasonable is not counted in the results, as an example. Further the process considers that to be counted as underemployed an individual must be currently employed and willing to take another job at a pay rate commensurate with personal skills, education and experience.

Our propriety data applications allow for state-wide or large multi-county partnerships for cost reductions. Our largest single Labor Availability study consisted of five partners and 27 counties, with each partner receiving its own labor shed breakout report from the same database, making the project more cost effective for all partners. All survey data is retained and available for further analysis on specific areas of interest (pricing may vary). The individual partner report results are proprietary and for your use only and are not shared with other partners. Only the database is common and by a programming application, separate labor shed reports can be developed. The survey questionnaire must be uniform across the entire project area.