The Greater St. Louis Metropolitan
WIOA Regional Plan

Program Years 2024-2027
Revised 01-2024

The Workforce Innovation and Opportunity Act (WIOA) of 2014 Section 107(d) requires local WIOA areas that make up an economic region develop and submit a Regional Plan in collaboration with other local areas. This Plan will align service delivery, direct investments, apply job-driven strategies and enable the building of a skilled workforce across the metropolitan area.

The St. Louis Planning Region for the WIOA is comprised of the following Missouri Local Areas: St. Louis City, St. Louis County, St. Charles County and Jefferson/ Franklin Counties. The St. Louis Planning Region also includes the Illinois Counties of Madison and St. Clair.

As a foundation to this Regional Plan, each Local Workforce Development Area's (LWDA) response to the requirements stated in WIOA Section 108(b)(1)-(22) can be found in their Local Plan which is attached to this document. The responses from each Local Plan to the requirements were taken into consideration and incorporated into the development of this collaborative regional effort.

Regional Planning Outcomes/Deliverables

There are eight Outcomes/Deliverables required of Regional Plans. The following sections (A) through (H) fulfill this requirement for the St. Louis Metropolitan Region:

A) **"Contain each of the Local Plans within the regional planning area that meets the intent of the law".**

As stated above, each local WIOA Area's Plan is attached to this Regional Plan. Additionally, the narrative explaining regional planning is included in each of those Local Plans

B) **"Establish regional service strategies, including use of cooperative service delivery agreements".**

The Directors of the St Louis Metropolitan Statistical Area (SLMSA) formed a group called the St. Louis Regional Workforce Development Board (WDB) Directors' Consortium.

The St. Louis Regional WDB Directors Consortium was designed to create a forum of workforce development professionals to collaborate and focus on issues

related to the economic development and the workforce systems that impact the greater St. Louis Metropolitan Service Area (SMSA), including the Illinois counties of St. Clair and Madison.

The St. Louis Regional WDB Directors Consortium was created in February 2012 and is comprised of the WDB Directors for St. Louis City, St. Louis County, St. Charles County, Jefferson / Franklin Counties in Missouri and Illinois counties of Madison and St. Clair. Other participants include; Deputy Directors and Wagner Peyser Regional Managers. The consortium schedules quarterly meetings and are hosted by each region on a rotational basis.

In 2017, the Association expanded to include members of the Business Services Team from each of the regional workforce agencies. This helped increase the flow of communication and planning. In 2022, the Committee also agreed to elect a Co-Chairs (one from each state) for one-year terms, with the goal of having the group's leadership rotate throughout the region on an annual basis. Elections are to be held at each December meeting for the coming year.

The vision of the consortium:
- Create a forum designed to promote proactive and effective collaborations and communications among the Workforce Development professionals and other stakeholders in the greater St. Louis MSA.
- To collaborate and develop partnerships for the implementation of regional projects/initiatives which would allow for joint applications for Federal grants.
- To ensure the workforce development activities/services meet the needs of employers and support economic growth in the region by; enhancing communication, coordination, and collaboration among employers, economic development entities and service providers.
- To develop and implement strategies for meeting the employment and skill needs of workers and employers such as; establishing industry and sector partnerships. To fully engage businesses in this endeavor.
- To promote 'value-added" training of the workforce that meets the demand and expectation of businesses, significantly enhancing the skills and abilities of job seekers, and ultimately strengthening the regions' economy.
- To better coordinate and when possible, synchronize regional planning of special workforce events including major job fairs, Annual Manufacturing Day, apprenticeship initiatives and other WIOA services to job-seekers

and employers.

The following regional service strategies have been developed as a result of the WDB Directors Consortium:

<u>Business Service Strategy</u>

Local Business Services Team and NEXUS groups from each area meet regularly to exchange current efforts in working with employers that seek services across the Region.

Additionally, each area uses email blasts to send notice of upcoming recruitment events to others in the St. Louis Region. These notices may then be shared in local Job Centers, local area's web sites and social media posts.

The Business Services Teams in the Region also work with the States' Employment Transition Teams to coordinate State Business services with local Job Center services.

The Regional Workforce Directors or their designee work with the Greater STL and other economic development groups such as the Missouri Partnership and Missouri Economic Development Council (MEDC) to better coordinate efforts between workforce and economic development agencies and professionals.

Serving those with Disabilities

The six WDBs of the region originally coordinated a regional disability initiative called, Accommodations for Success, in August 2015. The intent of this committee was to engage companies to understand the requirements of the new American with Disabilities Act and how public workforce agencies around the region could work with them to fulfill their obligations. A kick-off event, Accommodations for Success – Next Level was planned and successfully held in August 2016.

This has become an annual event and is now held every August and is moved around the region, allowing each Job Center to play a special role in hosting and formatting this successful event.

<u>Referrals of Jobseekers between areas</u>

In the past the Workforce Regions shared a formal referral process including referral forms. However, technology and a shared data system no longer require paper forms. Staff record the services provided to each jobseeker into the

shared case management system. If the individual visits a Job Center in a different area, staff in the new area can see what has already occurred and coordinate services to ensure no duplication of service or expenditure occurs.

The Region has developed a Cooperative Service Delivery Agreement to serve as an umbrella agreement to all these initiatives. See Attachment 1.

C) **"Develop and implement sector initiatives for in-demand industry sectors or occupations for the region"**.

Background:
The development of WIOA-focused sector strategies for the St. Louis Region began in meetings of the Directors' Consortium. Strategy development continued at the Sector Strategy Kickoff hosted by the State Division of Workforce Development (DWD) in the fall of 2015. The first two sectors selected as a Regional focus were Advanced Manufacturing and Healthcare.

A formal Regional Sector Strategy was developed and submitted to OWD as required. The six LWDAs collaborated with a regional effort spearheaded by the St. Louis Partnership (an Economic Development agency) to address the needs of advanced manufacturing throughout the entire Metropolitan Region. Several collaborative initiatives resulted and continue from this effort.

Currently:
The Region re-affirms their continued commitment to Advanced Manufacturing, Information Technology and Healthcare sector initiatives.

D) **"Collection and analysis of regional labor market data (in conjunction with the State)…. for the purpose of regional planning"**

For statistical data and analysis of the entire region's labor market see the following:

Greater STL 2030 Jobs Plan: https://www.greaterstlinc.com/wp-content/uploads/2021/05/2030-Jobs-Plan.pdf

Missouri Workforce 2023 St. Louis Region from Sept of Higher Education & Workforce Development: https://meric.mo.gov/media/pdf/st-louis-economic-and-workforce-report

Attachment 2: 2023 State of St. Louis Workforce Report to the Region

Data from these reports and discussion with area business and partners guided the LWDA in developing this Regional Plan.

To see how this analysis breaks out into the local areas see "Section 7. Labor Market Analysis" of each areas' local plan attached to this document.

St. Louis Regional Economic Analysis

Personal Income

In the St. Louis Region, two counties were above the state average of $57,818 for per capita personal income in 2022. All five counties in the St. Louis Region had per capita personal income over $50,000.

In 2022, personal income for the US and Missouri increased 2.0 percent and 3.2 percent respectively when compared to 2021.

The statewide poverty rate of working age persons, or those 18-64 years, was 12.3 percent in 2022. In the St. Louis Region, the poverty rate was lower than the state average in four counties. St. Charles County had the lowest poverty rate (4.1%) while St. Louis City had the highest poverty rate (18.3%).

Name	2022 Per Capita Personal Income	Working Age (18-64) Population living below poverty level	
		Number	Percentage
Missouri	$57,818	445,345	12.3%
Franklin	$53,957	4,898	7.9%
Jefferson	$51,143	10,855	7.8%
St. Charles	$64,563	9,871	4.1%
St. Louis County	$93,405	52,386	8.9%
St. Louis City	$55,771	35,779	18.5%

Sources: *Per Capita Personal Income - U.S. Bureau of Economic Analysis, 2022*
Poverty Level - American Community Survey-5 Year data (2018-2022)

      a. Number and percent of working age population determined to have a barrier to employment;

Barriers to employment can include homelessness, disability status, lower education levels, and limited proficiency with the English language. All counties but one in the St. Louis Region had a lower percentage of working age population (18-64 years old) with disabilities as compared to the state average of 12.3 percent. St. Louis City had the highest percentage of the working age population with a disability at 13.3 percent. The percentage of the working age population with English as a second language in Missouri was 7.1 percent. St. Louis County and St. Louis City had a higher percentage of the working age population with English as a second language, at 11.1 percent and 9.7 percent, respectively.

In Missouri, 10.8 percent of the working age population did not have a high school diploma in 2022. Two of the five counties in the region had higher percentage of the working age population without a high school diploma than the state percentage. St. Louis City had the highest percentage of the population without a high school diploma at 11.2 percent. St. Louis County had the lowest percentage of the population without a high school diploma, at 10.3 percent.

Barriers To Employment									
Area	Total Population	Total Population 18-64	% of 18-64 in Population	Total Population 18-64 with less than high school diploma	% of Population 18- 64 without high school diploma	Total Population 18-64 with a disability	% of Population 18-64 with a disability	Total Population 18-64 who speak language other than English	% of Population 18-64 who speak language other than English
Missouri	6,154,422	3,697,543	60.1%	265,816	10.8%	449,967	12.3%	261,796	7.1%
Franklin	104,858	62,026	59.2%	3,642	10.5%	7,156	11.6%	1,210	2.0%
Jefferson	226,984	139,354	61.4%	4,350	10.9%	15,692	11.3%	5,447	3.9%
St. Charles	406,262	248,267	61.1%	15,455	10.4%	21,158	8.5%	14,715	5.9%
St. Louis County	999,703	595,491	59.6%	62,321	10.3%	55,593	9.4%	66,327	11.1%
St. Louis City	298,018	198,910	66.7%	23,167	11.2%	26,154	13.3%	19,342	9.7%

Source: *American Community Survey-5 Year data (2018-2022)*

b. Employment rates for the last 5 years;

The unemployment rate in the St. Louis Region is declining after peaking in 2020 due to the COVID-19 pandemic. The unemployment rate for 2022 was below the state average of 2.5 percent in four of the five counties. St. Charles County had the lowest unemployment rate at 2.1 percent. The highest unemployment rate was in St. Louis City, at 3.1 percent.

Unemployment Rate by County - St. Louis Region					
Year	2018	2019	2020	2021	2022
US	3.9%	3.7%	8.1%	5.3%	3.6%
Missouri	3.2%	3.2%	6.1%	4.1%	2.5%
Franklin	3.1%	3.1%	6.2%	3.7%	2.3%
Jefferson	3.1%	3.0%	6.1%	3.8%	2.4%
St. Charles	2.5%	2.5%	5.2%	3.2%	2.1%
St. Louis County	3.0%	3.0%	6.3%	4.2%	2.4%
St. Louis City	3.9%	3.8%	8.7%	5.9%	3.1%

Source: *Local Area Unemployment Statistics, Not Seasonally Adjusted*

c. Major layoff events over the past 3 years and any anticipated layoffs; and

d. Any other factors that may affect local/regional economic conditions.

7. Labor Market Analysis

a. Existing Demand Industry Sectors and Occupations

Provide an analysis of the industries and occupations for which there is existing demand.

Current Industry Demand

The St. Louis Region had a negative compound annual growth rate of -0.1 percent over the 5-year period from 2017 to 2022, with a -0.03 percent overall gain from 2017 to 2022. However, several industry groups had a positive growth rate over the same time period. Those industries included *Agriculture, Forestry, Fishing and Hunting* (399 employment increase at 13.0% compound annual growth rate); *Utilities* (963 at 10.8%); and *Transportation and Warehousing* (8,104 at 5.9%).

St. Louis Region Industry Employment 2017-2022

St. Louis Region Industry Growth 2017-2022

Industry	Compound Annual Growth Rate
Agriculture, Forestry, Fishing and Hunting	(highest positive, ~13%)
Utilities	~10.5%
Transportation and Warehousing	~6%
Mining, Quarrying, and Oil and Gas Extraction	~5%
Construction	~2%
Educational Services	~2%
Real Estate and Rental and Leasing	~2%
Wholesale Trade	~2%
Professional, Scientific, and Technical Services	~0.7%
Arts, Entertainment, and Recreation	~0.6%
Finance and Insurance	~0.6%
Manufacturing	~0.2%
Health Care and Social Assistance	~0%
Total, All Industries	~0%
Information	negative
Administrative and Support and Waste Mgmt	negative
Other Services (except Public Administration)	negative
Management of Companies and Enterprises	negative
Accommodation and Food Services	negative
Retail Trade	~ -2%

Location Quotient

Location Quotient (LQ) describes the concentration of an industry in a geographic region in relation to the nation. The national average is 1.0. Industries with an LQ higher than 1.0 indicate an above average concentration of that industry in the area.

In 2022, the St. Louis Region had six industries with LQs of 1.5 or higher, including *Management of Companies and Enterprises* (2.1); *Chemical Manufacturing* (1.9); *Hospitals* (1.7); *Beverage and Tobacco Product Manufacturing* (1.6); *Machinery Manufacturing* (1.5); and *Printing and Related Support Activities* (1.5).

2022 St. Louis Region Location Quotients

Industry	Employment	Location Quotient
Management of Companies and Enterprises	36,377	2.1
Chemical Manufacturing	11,886	1.9
Hospitals	60,136	1.7
Beverage and Tobacco Product Manufacturing	3,552	1.6
Machinery Manufacturing	11,866	1.5
Printing and Related Support Activities	4,039	1.5
Insurance Carriers and Related Activities	25,388	1.4
Social Assistance	42,261	1.4
Securities, Commodity Contracts, and Other F	10,165	1.4
Educational Services	29,187	1.4
Merchant Wholesalers, Durable Goods	31,153	1.3
Museums, Historical Sites, and Similar Insti	1,460	1.3
Telecommunications	6,042	1.3
Computing Infrastructure Providers, Data Pro	4,029	1.2
Performing Arts, Spectator Sports, and Relat	4,079	1.2

Source: *Quarterly Census of Employment and Wages (QCEW), 2022 Annual Averages*

Current Occupational Demand

Current occupational demand can be attained through the job ads placed by employers. From November 2022 to October 2023, nearly 318,710 on-line job ads were placed for jobs located in the St. Louis Region according to Lightcast™.

Job ads were placed for positions at every skill and education level. Missouri uses a system of **Now**, **Next,** and **Later** to categorize jobs according to the typical education and experience required for success on the job. **Now** jobs typically require a high school education or less and short-term training. **Next** jobs typically require moderate to long-term training or experience or education beyond high school. **Later** jobs typically require a bachelor's degree or higher education.

Now occupations with the highest number of job postings included *Retail Salespersons*; *Customer Service Representatives*; *Fast Food and Counter Workers*; *Laborers and Freight, Stock, and Material Movers, Hand*; and *Janitors and Cleaners, Except Maids and Housekeeping Cleaners*.

Occupations with the most job postings in the **Next** category were *Sales Representatives, Wholesale and Manufacturing*; *First-Line Supervisors of Retail Sales Workers*; *Licensed Practical and Licensed Vocational Nurses*; *Maintenance and Repair Workers, General*; and *Nursing Assistants*.

Later occupations with the highest number of job postings were *Registered Nurses*; *Software Developers*; *Computer Occupations, All Other*; *Medical and Health Services Managers*; and *Managers, All Other*.

Many of the occupations with the most job postings also have high numbers of projected openings through 2030. The occupations with high numbers of job postings and high numbers of projected annual openings are identified with the star.

SOC Code	Occupation Title	Online Job Postings	
Top Job Ads - St. Louis Region			
NOW - Typically requires high school education or less and short-term training			
41-2031	Retail Salespersons	7,800	★
43-4051	Customer Service Representatives	5,570	★
35-3023	Fast Food and Counter Workers	4,470	★
53-7062	Laborers and Freight, Stock, and Material Movers, Hand	4,290	★
37-2011	Janitors and Cleaners, Except Maids and Housekeeping Cleaners	3,600	★
43-6014	Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	3,080	★
35-3031	Waiters and Waitresses	2,950	★
37-2012	Maids and Housekeeping Cleaners	2,850	★
33-9032	Security Guards	2,470	★
31-1120	Home Health and Personal Care Aides	2,450	★
NEXT - Typically requires moderate/long-term training or experience or education beyond high school			
41-4012	Sales Representatives, Wholesale and Manufacturing	6,740	★
41-1011	First-Line Supervisors of Retail Sales Workers	5,980	★
29-2061	Licensed Practical and Licensed Vocational Nurses	4,350	
49-9071	Maintenance and Repair Workers, General	4,080	★
31-1131	Nursing Assistants	3,930	★
11-9051	Food Service Managers	3,890	
53-3032	Heavy and Tractor-Trailer Truck Drivers	3,360	★
29-2099	Health Technologists and Technicians, All Other	2,900	
31-9092	Medical Assistants	2,730	★
43-3031	Bookkeeping, Accounting, and Auditing Clerks	2,290	★
LATER - Typically requires a bachelor's degree or higher			
29-1141	Registered Nurses	24,020	★
15-1252	Software Developers	7,410	★
15-1299	Computer Occupations, All Other	4,440	
11-9111	Medical and Health Services Managers	4,420	★
11-9199	Managers, All Other	4,400	
13-2011	Accountants and Auditors	2,970	★
11-1021	General and Operations Managers	2,900	★
13-1071	Human Resources Specialists	2,430	★
11-2022	Sales Managers	2,430	
11-3031	Financial Managers	2,340	★

Source: *Lightcast, job ads between Nov. 1, 2022 - Oct. 31, 2023*

★ = *Top Job Openings in Now, Next and Later , 2020-2030 Occupational Projections for St. Louis Region, MERIC*

Missouri Workforce 2023 Survey

From February 20, 2023, to April 17, 2023, over 2,800 Missouri companies with five or more employees were surveyed to gauge the state of the workforce from the employer's perspective. A total of 1,705 employers started the survey but did not respond to all questions, and 1,183 employers completed every question in the survey. Seventy-three percent employers responded over the phone and 27 percent completed the online version of the survey. Companies were asked 26 questions, some with multiple parts, about hiring trends, skill needs and shortages, workforce initiatives, recruitment strategies, and education and experience requirements.

Companies interviewed were randomly selected from a categorized list of Missouri businesses from the Data Axle employer database. The sample was selected to be representative of Missouri's industry sectors and workforce regions. Regional quotas were based on the region's share of employment relative to the state. Over half (51%) of employers surveyed had 11-49 employees. The industries selected for the survey were chosen to represent a composite picture of the state's industry mix with a statistically significant sample surveyed from each of the industry sector matching the approximate ratio of these industries across the state.

To gauge employment trends, employers were asked about their staffing levels and future hiring plans. When asked about employment changes over the last 12 months, half (50%) said that *employment levels (total employment) remained the same as before* (47% in 2021, 57% in 2020, and 48% in 2019). In 2019, more employers reported increasing employment levels rather than decreasing (21% reporting a significant or slight decrease compared to 32% reporting a significant or slight increase). This flipped in 2020 and 2021, mostly due to the COVID-19 pandemic. In 2023, about 28 percent of surveyed employers reported *increased* employment levels, either slightly or significantly, while 22 percent reported *significant or slight decrease* in employment levels.

For the third year in a row, *hiring new full-time employees* remained the top method of expanding employment, with 75 percent of employers stating they would *hire new full-time employees.* Fifty-nine percent of employers reported they would *hire part-time employees.*

Employers were asked about the barriers they encountered in expanding employment. *Lack of applicants overall* was a new option for employers in the 2023 survey, and 66 percent of surveyed employers selected this option, making it the top barrier to expansion of employment. The next highest barriers were *shortage of applicants with knowledge or skills* and *economic conditions*, which have been the top cited barriers since the survey began in 2019. *Shortage of applicants with knowledge or skills* increased significantly from previous years, from 47 percent in 2019 and 2020, to 60 percent in 2021, and 65 percent in 2023. *Economic conditions* as a barrier to employment decreased from 37 percent in 2021 to 30 percent in 2023. Similarly, fewer employers encountered *government policies or regulations* as a barrier to expanding employment, dropping from 30 percent in 2021 to 13 percent in 2023.

Other significant barriers encountered in 2023 included *lack of childcare* and *transportation access,* with 21 percent of respondents reporting these as barriers to expanding employment.

The survey also asked employers to rate the importance of each barrier on a scale of one to five, with one being insignificant and five being critical. The highest weighted average response for any barrier cited this year was *lack of applicants overall,* getting an importance score of 4.05 out of 5. The next highest weighted response was *government policies or regulations* (3.88), followed by *shortage of applicants with knowledge or skills* (3.85). Although the share of employers choosing *government policies or regulations* as a barrier to employment expansion has decreased, for those that did encounter it, it was still a critical barrier. *Shortage of available training programs* dropped in importance from 3.98 in 2019 to 3.15 in 2023.

Companies employ workers in a variety of functional areas with different work responsibilities. *Patient Care* and *Skilled Trades* functional areas had the largest percentage of employers reporting shortages of skilled applicants at 65 percent each. Skill shortages in *Customer Service* have increased substantially, increasing from 25 percent in 2019 and 31 percent in 2020, to 47 percent in 2021, decreasing slightly to 45 percent in 2023.

To address the problem of skill shortages in the current workers, employers use several remedial measures, and *on-the-job-training* remains the most preferred method. Over 9 in 10 employers (91%) stated they used *on-the-job training* to assist current workers in addressing the need for new or increased skills. However, there is a significant decrease in applying these remedial measures in 2023 when compared to 2021, most significantly in *providing a flexible schedule to pursue outside continuing education* (67% in 2021 vs. 46% in 2023) and *in-house classroom training* (60% in 2021 vs. 41% in 2023).

Relatedly, employers were also asked if there was any change over the last two years in flexibility for hiring applicants with less than the advertised preferred level of qualifications in education, experience, and skill level. Most employers said they stayed about the same in flexibility for hiring applicants. The majority that changed became more flexible in their consideration of applicants. Twenty-three percent of employers were more flexible with education requirements, 31 percent were more flexible with experience level requirements, and 29 percent were more flexible on skill level requirements.

Since the COVID-19 pandemic, there has been an increased interest in understanding remote work. Prior to pandemic, (February 2020) about 15 percent employers were having some workers working remotely. Remote work peaked in 2020 during the height of the pandemic, with over half of employers (56%) stating they had some workers working remotely, either full or part-time. This dropped significantly to 20 percent in 2021 and has increased slightly to 25 percent in 2023. When asked if they expected the number of remote workers to change over time, the vast majority (92%) of employers said they expected it to stay the same. In the question about workforce initiatives considered in the coming year, 13 percent of employers indicated considering *remote work*.

Employers evaluated various business concerns for the future on a scale of one to five, with one being not concerned and five being very concerned. Employers were most concerned about

attracting or retaining talent, with a weighted average of 3.7. Several concerns decreased in importance from 2021, including *lack of information for decision making* (2.92 in 2021 vs. 2.38 in 2023) and *supply chain disruptions* (3.61 in 2021 vs. 3.1 in 2023). *Cost of health insurance* was among the major concerns reported in the 2023 survey.

Although employers are optimistic about expanding employment, with 44 percent planning to *increase employment levels* over the next 12 months, they continue to struggle to find skilled applicants. Sixty-two percent of employers had positions that took over 30 days to fill. A *lack of overall applicants* and *shortage of applicants with knowledge or skills* were the top barriers to expanding employment, with the *shortage of applicants with knowledge or skills* at the highest reported level it has been since the first survey in 2019. The most important business concern for employers was *attracting and retaining talent.* To try and retain existing workers, employers have *increased wages* (86%), *offered a flexible work schedule* (64%), or *offered additional training* (52%). Responses to this survey reinforce the widely-held experience of a tight labor market and difficulty finding workers.

b. Emerging Demand Industry Sectors and Occupation

Provide an analysis of the industries and occupations for which demand is emerging.

Industry Projections

The long-term industry projections help determine the industries that are expected to experience job growth over time. The latest round of projections is through the ten-year period ending in 2030.

The top five industries by numeric employment change were *Food Services and Drinking Places; Professional, Scientific, and Technical Services*; *Administrative and Support Services*; *Ambulatory Health Care Services*; and *Hospitals*.

		Employment		2020-2030 Change	
St. Louis Region Industry Projections 2020-2030					
NAICS	Industry	2020	2030	Numeric	Percent
10	**Total All Industries**	**1,120,239**	**1,201,727**	**81,488**	**7.3%**
722	Food Services and Drinking Places	71,753	89,529	17,776	24.8%
541	Professional, Scientific, and Technical Services	64,921	72,429	7,508	11.6%
561	Administrative and Support Services	58,127	65,348	7,221	12.4%
621	Ambulatory Health Care Services	45,732	52,405	6,673	14.6%
622	Hospitals	67,779	74,144	6,365	9.4%
611	Educational Services	82,344	88,037	5,693	6.9%
238	Specialty Trade Contractors	33,339	37,133	3,794	11.4%
721	Accommodation, including Hotels and Motels	8,400	11,609	3,209	38.2%
423	Merchant Wholesalers, Durable Goods	29,798	32,231	2,433	8.2%
813	Religious, Grantmaking, Civic, Professional, and Similar Organizations	26,101	28,251	2,150	8.2%
711	Performing Arts, Spectator Sports, and Related Industries	2,484	4,477	1,993	80.2%
713	Amusement, Gambling, and Recreation Industries	9,115	10,966	1,851	20.3%
999	Local Government, Excluding Education and Hospitals	34,490	35,753	1,263	3.7%
488	Support Activities for Transportation	4,728	5,919	1,191	25.2%
424	Merchant Wholesalers, Nondurable Goods	14,012	14,946	934	6.7%

Source: *MERIC 2020-2030 Long Term Projections*

Occupational Projections

Job openings occur due to three reasons – **exits**, **transfers**, and **growth**. **Exits** occur as people leave the workforce for reasons such as retirement. **Transfers** occur when workers leave one occupation for a different occupation. Occupational **growth** occurs as businesses grow and need more workers to serve their customers.

Emerging occupations can be identified through projected growth openings. The following chart identifies occupations that have the highest number of annual growth openings in the region. Total openings are the sum of transfers, exits, and growth, and indicates the projected number of vacancies that businesses will need to fill each year.

Missouri uses a system of **Now**, **Next,** and **Later** to categorize occupations according to these levels. **Now** jobs typically require a high school education or less and short-term training. **Next** occupations typically require moderate to long-term training or experience or education beyond high school. **Later** occupations typically require a bachelor's degree or higher.

Growth openings are projected at all education and training levels. Occupations in the table below are listed by the highest number of growth openings. **Now** occupations with the highest numbers of projected growth openings were *Home Health and Personal Care Aides*; *Fast Food and Counter Workers*; and *Waiters and Waitresses*. **Next** occupations with the highest numbers of projected growth openings were *Cooks, Restaurant*; *First-Line Supervisors of Food Preparation and Serving Workers*; and *Heavy and Tractor-Trailer Truck Drivers*. **Later** occupations with the most projected growth openings were *Software Developers and Software Quality Assurance Analysts and Testers*; *Registered Nurses*; and *General and Operations Managers*.

St. Louis Region Highest Growth Openings 2020-2030						
	Average Wage	Percent Growth	Annual Openings			
Occupation			Exits	Transfers	Growth	Total
NOW - Typically requires short-term on-the-job training or less, little to no experience, and/or a high school diploma						
Home Health and Personal Care Aides	$26,856	20.4%	2,339	2,069	**677**	5,085
Fast Food and Counter Workers	$25,107	15.6%	2,386	2,602	**356**	5,344
Waiters and Waitresses	$24,801	21.4%	1,345	2,188	**355**	3,888
Laborers and Freight, Stock, and Material Movers, Hand	$36,784	10.4%	722	1,435	**162**	2,319
Bartenders	$27,951	33.9%	212	566	**135**	913
Security Guards	$36,130	17.6%	434	634	**132**	1,200
Construction Laborers	$61,053	15.2%	263	600	**126**	989
Passenger Vehicle Drivers, Except Bus Drivers, Transit and Intercity	$31,619	19.5%	360	271	**97**	728
Janitors and Cleaners, Except Maids and Housekeeping Cleaners	$30,738	6.0%	1,012	1,136	**95**	2,243
Dining Room and Cafeteria Attendants and Bartender Helpers	$24,234	29.0%	300	301	**88**	689
NEXT - Typically requires non-degree certificate, associate degree, apprenticeship, some experience, or moderate- to long-term training						
Cooks, Restaurant	$27,958	51.7%	758	1,102	**528**	2,388
First-Line Supervisors of Food Preparation and Serving Workers	$36,708	23.3%	320	730	**150**	1,200
Heavy and Tractor-Trailer Truck Drivers	$52,480	8.5%	554	917	**111**	1,582
Fitness Trainers and Aerobics Instructors	$38,039	30.1%	242	392	**108**	742
Computer User Support Specialists	$56,153	12.4%	126	355	**78**	559
Carpenters	$65,036	7.8%	293	627	**76**	996
Insurance Sales Agents	$72,547	11.4%	220	369	**71**	660
Sales Representatives, Wholesale and Manufacturing, Except Technical and S	$81,848	7.6%	281	643	**70**	994
Maintenance and Repair Workers, General	$47,236	6.5%	390	646	**70**	1,106
Medical Secretaries	$38,591	9.9%	366	402	**68**	836
LATER - Typically requires a bachelor's degree or higher						
Software Developers and Software Quality Assurance Analysts and Testers	$100,718	18.3%	390	825	**282**	1,497
Registered Nurses	$68,561	8.6%	906	854	**281**	2,041
General and Operations Managers	$115,316	10.0%	496	1,538	**235**	2,269
Market Research Analysts and Marketing Specialists	$72,247	22.1%	147	454	**124**	725
Nurse Practitioners	$105,878	47.4%	65	97	**119**	281
Medical and Health Services Managers	$113,250	30.4%	108	219	**114**	441
Management Analysts	$92,817	13.1%	237	425	**91**	753
Financial Managers	$153,478	18.7%	101	248	**84**	433
Accountants and Auditors	$77,123	6.5%	370	787	**84**	1,241
Secondary School Teachers, Except Special and Career/Technical Education	$52,173	6.4%	268	410	**62**	740

Source: *MERIC 2020-2030 Long-Term Occupational Projections*

c. Employers' Employment Needs

Identify the job skills necessary to obtain current and projected employment opportunities. With regard to the industry sectors and occupations, provide an analysis of the employment needs of employers. Describe the knowledge, skills and abilities required, including credentials and licenses.

Real-Time Labor Market Data

Job ads placed by employers offer another source of information on the knowledge, skills, and certifications requested by Missouri's employers. Lightcast™ is a data tool that spiders to over several thousand different web sites with job ads. The information found in the ads are placed in a database that can be queried to gain insight on employer needs.

The following table lists the specialized skills, certifications, and software and programming abilities requested most frequently by employers in job ads.

Generally, in the software and programming category, Microsoft Office and its products such as Word, Excel, PowerPoint, and Access rank at the top of the list across all industries. Therefore, in the following list, these Microsoft products have not been included as those tend to crowd the list by appearing at the top across all the industries. Industry-specific programs identified in the job ads are listed in the table.

Employer Skill Needs - St. Louis Region			
Industry	**Specialized Skills**	**Qualifications**	**Software and Programming**
Health Care & Social Assistance	Nursing	Registered Nurse (RN)	Chatbot
	Data Entry	Basic Life Support (BLS) Certification	Epic EMR
	Machinery	Licensed Practical Nurse (LPN)	Standard Template Library (STL)
	Nursing Care	Cardiopulmonary Resuscitation (CPR) Certification	AMT Asset Management Software
	Ability To Distinguish Colors	Valid Driver's License	SQL (Programming Language)
Accommodation & Food Service	Restaurant Operation	Valid Driver's License	Property Management Systems
	Food Safety & Sanitation	ServSafe Certification	Spreadsheets
	Food Services	Food Handler's Card	Standard Template Library (STL)
	Cash Handling	Food Safety Certification	Operating Systems
	Housekeeping	Cardiopulmonary Resuscitation (CPR) Certification	Salesforce
Professional, Scientific, & Technical Services	Project Management	Valid Driver's License	SQL (Programming Language)
	Computer Science	Top Secret-Sensitive Compartmented Information (TS/SCI Clearan	Python (Programming Language)
	Accounting	Security Clearance	Java (Programming Language)
	Agile Methodology	Project Management Professional Certification	Amazon Web Services
	Marketing	Master Of Business Administration (MBA)	Application Programming Interface (API)
Construction	Construction	Valid Driver's License	AutoCAD
	Project Management	Commercial Driver's License (CDL)	Autodesk Revit
	Subcontracting	Master Of Business Administration (MBA)	Operating Systems
	Construction Management	Professional Engineer (PE) License	Spreadsheets
	Accounting	30-Hour OSHA General Industry Card	SQL (Programming Language)
Finance & Insurance	Financial Services	FINRA Series 7 (General Securities Representative)	SQL (Programming Language)
	Finance	Master Of Business Administration (MBA)	Java (Programming Language)
	Project Management	Valid Driver's License	Python (Programming Language)
	Auditing	Certified Public Accountant	Salesforce
	Agile Methodology	Chartered Financial Analyst	JIRA
Wholesale Trade	Warehousing	Valid Driver's License	SAP Applications
	Merchandising	Commercial Driver's License (CDL)	Salesforce
	Marketing	Forklift Certification	Power BI
	Selling Techniques	Master Of Business Administration (MBA)	SQL (Programming Language)
	Forklift Truck	Automotive Service Excellence (ASE) Certification	Spreadsheets
Transportation & Warehousing	Warehousing	Valid Driver's License	Standard Template Library (STL)
	Forklift Truck	Commercial Driver's License (CDL)	Inventory Control Systems
	Palletizing	Hazmat Endorsement	SQL (Programming Language)
	Truck Driving	Airframe & Powerplant (A&P) Certificate	Operating Systems
	Print Production	Tanker Endorsement	SAP Applications
Information Technology	Computer Science	Valid Driver's License	SQL (Programming Language)
	Marketing	Certified Information Systems Security Professional	Operating Systems
	Project Management	Cisco Certified Network Associate	Python (Programming Language)
	Telecommunications	Top Secret-Sensitive Compartmented Information (TS/SCI Clearan	Java (Programming Language)
	Selling Techniques	Security Clearance	Salesforce

Source: *Lightcast, online job ads between Nov. 1, 2022 - Oct. 31, 2023*

Population Data

The U.S. Census Bureau estimates that Missouri's population grew to over 6.15 million in 2022, up by 0.2 percent from the previous year. In the St. Louis Region over the past year, three counties increased in population. The highest population increases in the past year were in the counties of Jefferson and St. Charles, adding over 1,070 and 3,880 residents respectively. St. Charles had the largest population growth over the five-year span from 2017 to 2022, with an increase of more than 21,100 residents.

St. Louis Region Population Change by County				
	1 Year Change 2021-2022		**5 Year Change 2017-2022**	
NAME	**Number**	**Percentage**	**Number**	**Percentage**
Missouri	**12,888**	**0.2%**	**79,122**	**1.3%**
Franklin	527	0.5%	2,445	2.4%
Jefferson	1,071	0.5%	4,345	2.0%
St. Charles	3,885	1.0%	21,147	5.5%
St. Louis County	(2,279)	-0.2%	164	0.0%
St. Louis City	(4,769)	-1.6%	(16,849)	-5.4%

Source: *U.S. Census Bureau, Population Annual Estimates*

Demographics

The St. Louis Region's population shows similar trends as that of Missouri's population. In 2022, overall, for Missouri, 25.0 percent of the population was under the age of 20 years. In 2022, in the St. Louis Region, St. Charles County (25.2%) had the highest percentage of its population under the age of 20 years. The percentage of the population 55 and up was above the state average of 30.6 percent in two of the five counties. The county with the highest percentage of residents age 55 and up was Franklin County with 33.5 percent of residents in this age group.

The Missouri statewide average is 49.4 percent male and 50.6 percent female. Jefferson County had the highest percent of male population (50.1%) in the region while St. Louis City had the highest percent of female population (52.1%).

Two counties in the region had a higher percentage of racial minorities than the statewide average. All counties in the St. Louis Region had lower percentage of Hispanic or Latino population, as compared to the Missouri average of 4.6 percent. St. Louis County had the highest Hispanic or Latino population percentage, at 4.3 percent.

County	Population						Gender		Race/Ethnicity								
	Total	Under 20	20 to 24	25 to 34	35 to 54	55+	Female	Male	White	Black or African American	Asian	American Indian and Alaska Native	Native Hawaiian and Other Pacific Islander	Some other race	One Race	Two or more races	Hispanic or Latino
Missouri	6,154,422	25.0%	6.7%	13.2%	24.4%	30.6%	50.6%	49.4%	79.4%	11.3%	2.1%	0.3%	0.1%	1.5%	94.6%	5.4%	4.6%
Franklin	104,858	24.7%	5.7%	12.0%	24.1%	33.5%	50.0%	50.0%	91.5%	0.9%	0.4%	0.1%	0.0%	0.6%	93.5%	6.5%	1.9%
Jefferson	226,984	24.9%	5.6%	12.4%	26.6%	30.5%	49.9%	50.1%	91.5%	1.0%	1.0%	0.1%	0.0%	0.6%	94.2%	5.8%	2.2%
St. Charles	406,262	25.2%	6.0%	12.5%	26.6%	29.7%	50.5%	49.5%	86.5%	5.0%	2.7%	0.1%	0.0%	1.0%	95.4%	4.6%	3.6%
St. Louis County	298,018	21.0%	6.6%	19.9%	25.2%	27.3%	51.4%	48.6%	46.3%	43.9%	3.5%	0.2%	0.1%	1.4%	95.3%	4.7%	4.3%
St. Louis City	999,703	24.5%	6.2%	12.7%	24.4%	32.2%	52.1%	47.9%	64.2%	24.2%	4.7%	0.1%	0.0%	1.3%	94.5%	5.5%	3.1%

Source: *American Community Survey-5 Year data (2018-2022)*

Employment and Unemployment

The number of St. Louis Region residents in the labor force has remained around one million from 2018 to 2022. The unemployment rate for the region jumped to 6.4 percent in 2020 because of the COVID-19 pandemic. However, 2021 and 2022 data show continuation of recovery with the unemployment rate decreasing to 4.2 percent and 2.4 percent respectively.
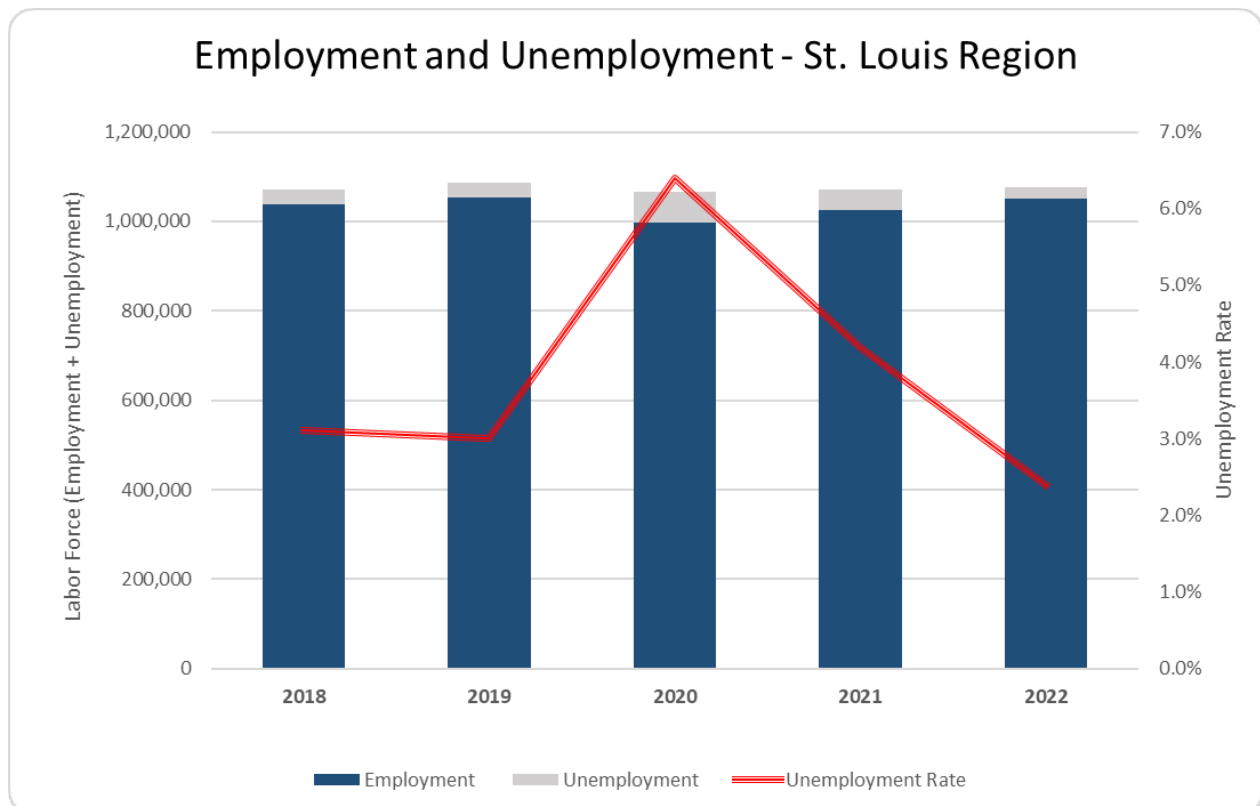
Source: *Local Area Unemployment Statistics (LAUS)*

Labor Force Participation

The labor force is the sum of employed and unemployed persons. The labor force participation rate is the labor force as a percent of the civilian population 16 years and older. Using American Community Survey, 5-year data through 2022, Missouri's labor force participation rate was 62.5 percent. In comparison, the rate for the St. Louis Region was higher, at 65.9 percent. The county with the highest labor force participation rate in the region was St. Charles County (69.3%) and the lowest was Franklin County (62.4%).

Civilian Labor Force Participation Rate by County			
Region	Population 16 years and over	Civilian Population 16 years and over (In labor force)	Labor Force Participation Rate (Civilian)
Missouri	4,940,395	3,087,517	62.5%
St. Louis Region	1,644,795	1,083,121	65.9%
Franklin	84,084	52,446	62.4%
Jefferson	181,316	119,817	66.1%
St. Charles	324,459	224,884	69.3%
St. Louis County	806,710	522,421	64.8%
St. Louis City	248,226	163,553	65.9%

Source: *American Community Survey-5 Year data (2018-2022)*

Labor Market Trends

In-Demand Occupations

Over the long term, industry needs for certain occupations grow while for others decline. A trained and ready workforce is needed to fill employer demand and offer job seekers bright prospects of employment.

Long-term projections are produced in each state in conjunction with the Bureau of Labor Statistics. Since economies vary throughout the state, projections are also generated for the regions in the state and provide insight on the occupations that are growing and declining. The total number of openings account for three different types of vacancies - **exits**, **transfers**, and **growth**. **Exits** occur as individuals leave the workforce for reasons such as retirement. **Transfers** occur as a person leaves an occupation to work in a different occupation. **Growth** simply means that more people are needed to work in the occupation. No matter the reason for the vacancy, skilled workers are needed to fill the job openings.

Missouri adds value to the standard projections template by including the ACT Workkeys Assessment Levels typically required for success in each of the 800+ occupations. Since most of Missouri's counties participate in the Certified Work Ready Communities program, the levels help those researching careers find good options based on their personal assessment.

Missouri uses a system of **Now**, **Next,** and **Later** to categorize the occupations according to the training and education typically required for success on the job. **Now** occupations typically require a high school education or less along with short-term training. **Next** occupations typically require moderate to long-term training or experience and/or education beyond high school. **Later** occupations typically require a bachelor's degree or higher.

While long-term projections offer a solid understanding of longer-term employer needs, job ads placed by employers help in recognizing the current needs of employers. When projections predict a high number of future openings and job ads show current demand for the same occupation, the occupation may be a good career possibility.

The table below displays the top five jobs by the number of projected openings for the 10-year projection period through 2030 in the **Now**, **Next**, and **Later** categories for the region. The flame beside some of the occupations represents "hot jobs" determined by the number of job ads placed by employers.

The **Now** occupations with the most annual job openings were *Fast Food and Counter Workers* (5,344); *Home Health and Personal Care Aides* (5,085); *Waiters and Waitresses* (3,888); *Retail Salesperson* (3,863); and *Cashiers* (3,068). A main reason for the high number of openings in these occupations was transfers and exits.

Occupations with the highest number of annual openings in the **Next** category were *Cooks, Restaurant* (2,388); *Secretaries and Administrative Assistants, Except Legal, Medical, and Executive* (1,647); *Heavy and Tractor-Trailer Truck Drivers* (1,582); *Nursing Assistants* (1,547); and *Bookkeeping, Accounting, and Auditing Clerks* (1,214).

Later occupations with the highest number of annual openings were *General and Operations Managers* (2,269); *Registered Nurses* (2,041); *Software Developers and Software Quality Assurance Analysts and Testers* (1,497); *Accountants and Auditors* (1,241); and *Project Management Specialists and Business Operations Specialists, All Other* (958).

Many high demand occupations correspond directly with certain industry sectors, such as *Health Care*, *Educational Services*, and *Retail*. Other high demand occupations, such as *Secretaries and Administrative Assistants* and *General and Operations Managers* are found in many different industry sectors.

St. Louis Region Occupational Projections 2020-2030							
	2020	**2030**	**Annual Openings**				**Average**
Occupation	**Employment**	**Employment**	**Exits**	**Transfers**	**Growth**	**Total**	**Wage**
NOW - Typically requires short-term on-the-job training or less, little to no experience, and/or a high school diploma							
Fast Food and Counter Workers 🔥	22,825	26,389	2,386	2,602	356	**5,344**	$25,107
Home Health and Personal Care Aides 🔥	33,152	39,921	2,339	2,069	677	**5,085**	$26,856
Waiters and Waitresses 🔥	16,546	20,094	1,345	2,188	355	**3,888**	$24,801
Retail Salespersons 🔥	28,734	28,041	1,587	2,345	-69	**3,863**	$32,945
Cashiers	19,311	17,087	1,548	1,742	-222	**3,068**	$25,601
NEXT - Typically requires non-degree certificate, associate degree, apprenticeship, some experience, or moderate- to long-term training							
Cooks, Restaurant	10,232	15,517	758	1,102	528	**2,388**	$27,958
Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	17,460	16,051	852	936	-141	**1,647**	$40,195
Heavy and Tractor-Trailer Truck Drivers 🔥	12,972	14,080	554	917	111	**1,582**	$52,480
Nursing Assistants 🔥	11,993	12,618	788	697	62	**1,547**	$27,153
Bookkeeping, Accounting, and Auditing Clerks 🔥	11,573	11,214	668	582	-36	**1,214**	$44,226
LATER - Typically requires a bachelor's degree or higher							
General and Operations Managers 🔥	23,638	25,990	496	1,538	235	**2,269**	$115,316
Registered Nurses 🔥	32,535	35,347	906	854	281	**2,041**	$68,561
Software Developers and Software Quality Assurance Analysts and Testers	15,411	18,227	390	825	282	**1,497**	$100,718
Accountants and Auditors 🔥	12,873	13,709	370	787	84	**1,241**	$77,123
Project Management Specialists and Business Operations Specialists, All Other	12,183	12,756	289	612	57	**958**	$83,690

🔥 Flame icon indicates occupations with high numbers of job ads between Nov. 1, 2022 - Oct. 31, 2023
Sources: *MERIC Long-Term Occupational Projections 2020-2030 and Lightcast, online job ads*

Education and Skill Levels of the Workforce

Educational Attainment

Educational attainment is a measure of the highest level of education obtained by individuals aged 25 and up, or the population generally in the workforce. Ninety-two percent of Missouri's population age 25 and over was a high school graduate or higher in 2022. About 19 percent held a bachelor's degree and 12 percent held a graduate or professional degree.

The St. Louis Region had a higher percentage than the state average of people whose highest educational attainment was associate degree or higher. Missouri had a higher percentage of people whose highest educational attainment was some college no degree, or high school or less.

Educational Attainment - St. Louis Region
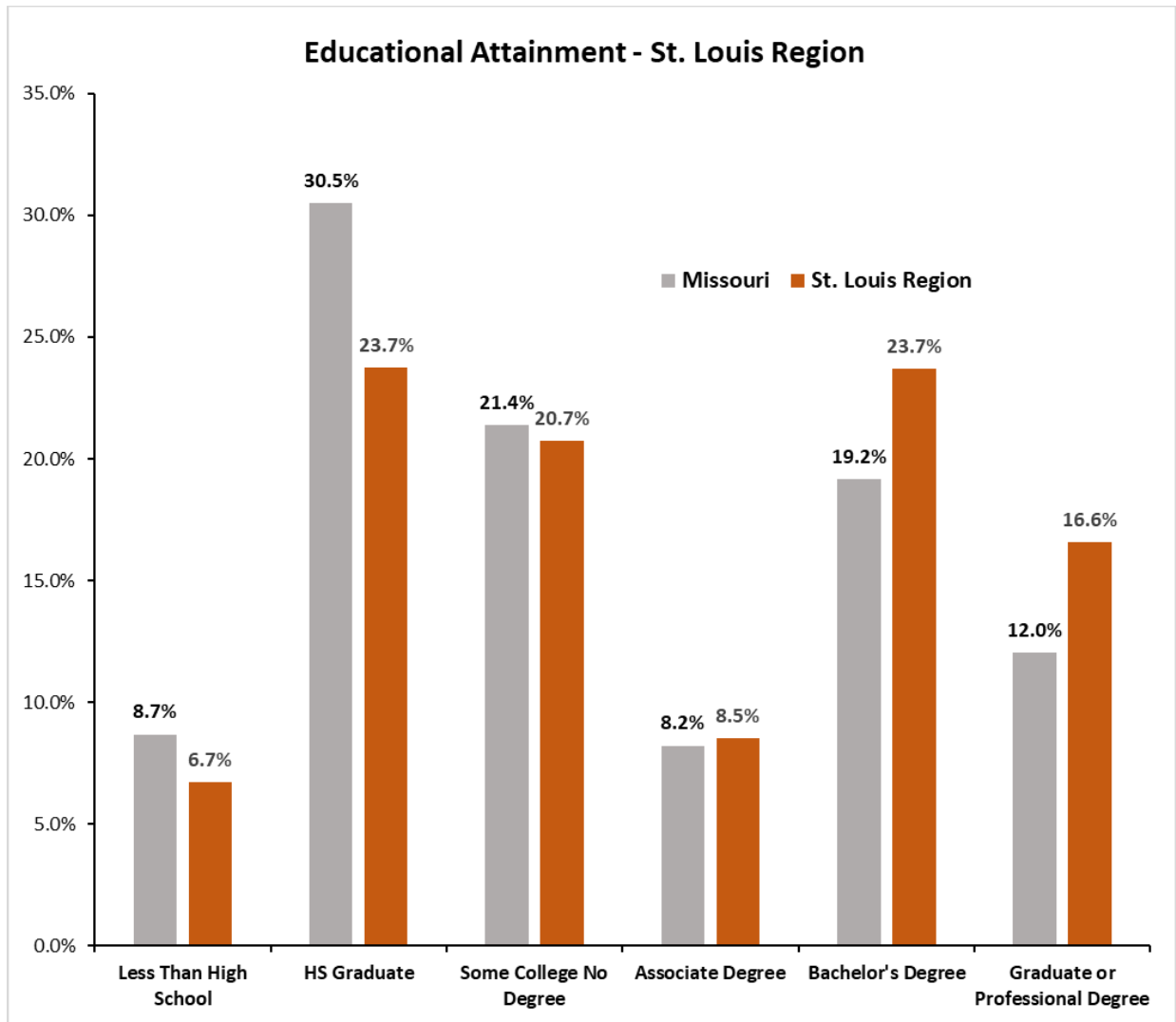
Source: *American Community Survey-5 Year data (2018-2022)*

Occupational Projections

Long-term projections are used to identify the fastest growing occupations, as well as occupations with a high number of openings through 2030.

The growth rate of an occupation measures the percentage of job growth by an occupation between the base year and projected year. Occupations requiring a graduate degree are projected to have the fastest growth rate (10.9%), followed by occupations requiring a bachelor's degree (8.8%).

Long-term projections also present data on expected job openings for each occupation through 2030. Openings in an occupation can occur due to an occupation growing, workers moving into a different occupation, or workers leaving the workforce entirely. No matter the reason, qualified individuals are still needed to fill job vacancies. Most openings will be in entry-level jobs, mostly due to high turnover rates as workers either transfer to other occupations or leave the workforce.

St. Louis WDA 2020-2030 Projected Growth Rate

High School or Less — 6.5%
Associate/Post HS — 6.5%
Bachelor's Degree — 8.8%
Graduate Degree — 10.9%

Avg 7.3%

Source: *MERIC Long-Term Occupational Projections 2020-2030*

St. Louis WDA Annual Openings 2020-2030

High School or Less — 86,842
Associate/Post HS — 12,035
Bachelor's Degree — 25,110
Graduate Degree — 3,041

■ Exits
■ Transfers
■ Growth

Source: *MERIC Long-Term Occupational Projections 2020-2030*

Skill Gaps

Missouri Workforce 2023 Survey

The Missouri Employer Survey has been conducted four times since 2019. Some questions have remained consistent each year, and others have changed to reflect current issues impacting the state's employers. Methodologies were held as consistent as possible from year-to- year. Comparisons to previous years are made throughout the report where applicable, but each survey indicates a snapshot in time. It can be used to infer changing trends in the labor market and employer sentiment but was not designed as a stringent time series analysis.
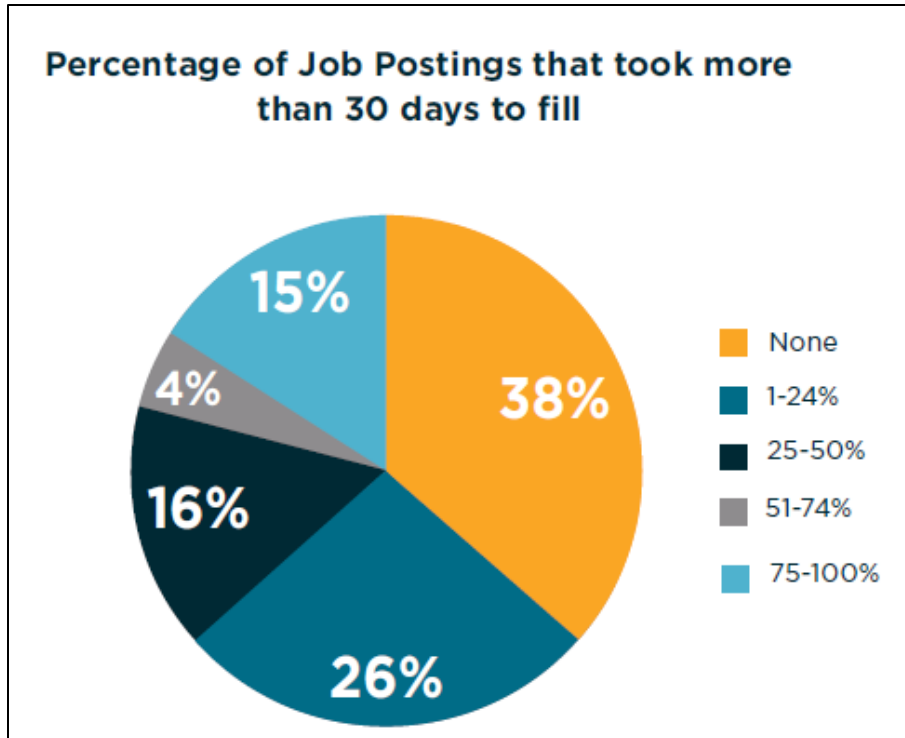
Missouri has more than 230,000 payroll employers who provide jobs to over 2.8 million people. Understanding the current hiring trends and challenges faced by the state's employers is essential not only in providing targeted resources and services to help these employers but also in supporting the state's economic and workforce development. Keeping these objectives in view, over 2,800 Missouri companies with five or more employees were surveyed from February 20, 2023, to April 17, 2023. This helped gauge the state of the workforce from the employer's perspective, with 1,183 employers completing the survey. Throughout the report, data in the graphs may not add to 100 percent due to rounding or the ability to select more than one response.

A few takeaways from this survey include:

- Employer's main concerns are hiring and retaining top talent.

- Sixty-two percent of employers had job postings that took more than 30 days to fill.

- The top barrier to expanding employment is a shortage of applicants with knowledge or skills, which has increased significantly from previous years (47% in 2019 and 2020, 60% in 2021, and 65% in 2023).

- Most employees work in person vs. working remotely.

- The top strategy used to retain existing workers is offering increased wages.

- Eighty-nine percent of surveyed employers have increased wages at an average of 11 percent in the last 12 months.

  Difficulty hiring quality employees was a constant theme throughout the survey. Sixty-two percent of employers reported they had some positions that took over 30 days to fill and 38 percent reported to have their vacant positions filled in less than 30 days.
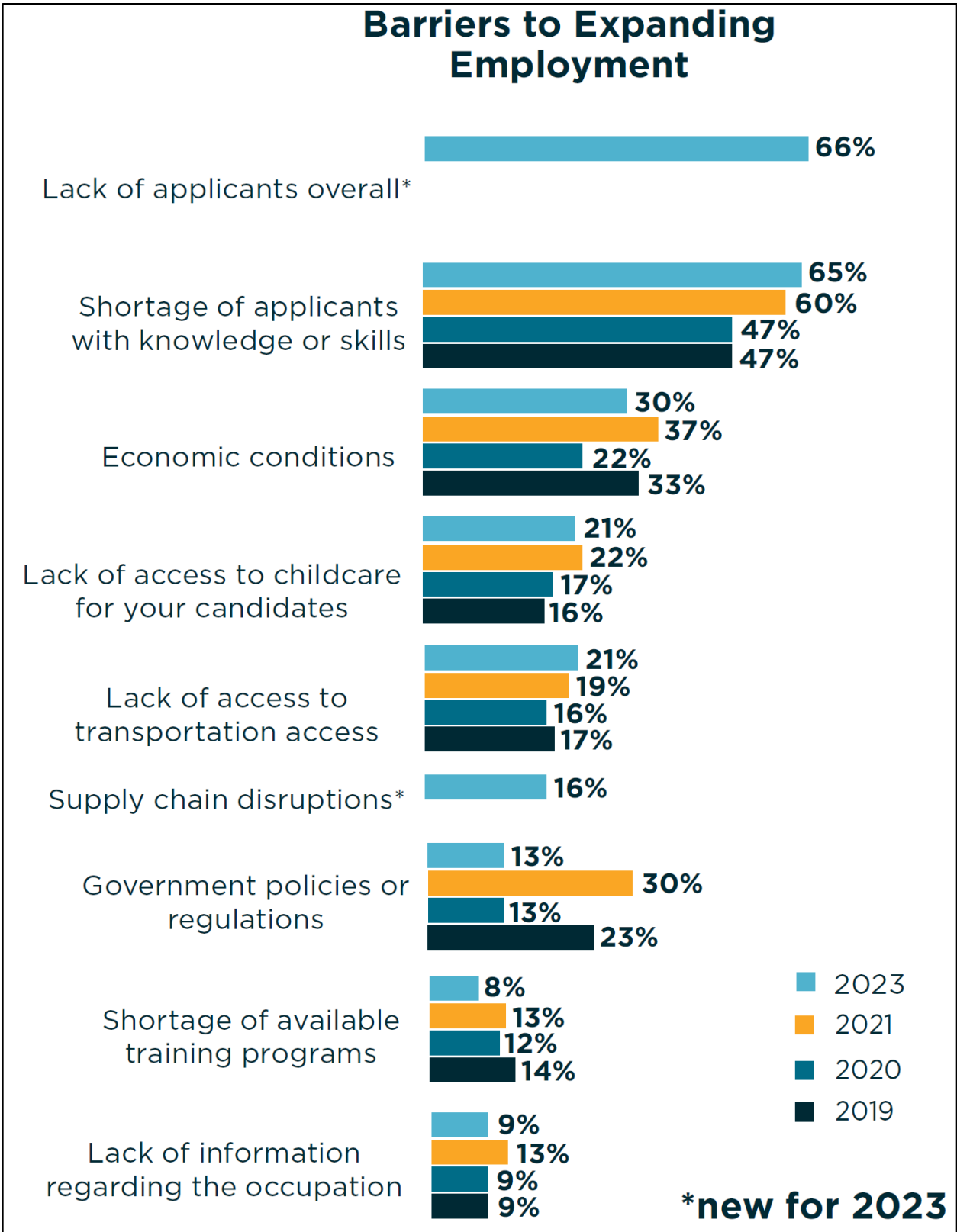
  Fifteen percent reported 75-100 percent of their vacant positions took over 30 days to fill. Jobs that were the hardest to fill were in *healthcare*; particularly *nursing* occupations; *sales*; and *food service.*

Percentage of Job Postings that took more than 30 days to fill

Employers were asked about the barriers they encountered in expanding employment. *Lack of applicants overall* was a new option for employers in the 2023 survey, and 66 percent of surveyed employers selected this option, making it the top barrier to expansion of employment. The next highest barriers were *shortage of applicants with knowledge or skills* and *economic conditions*, which have been the top cited barriers since the survey began in 2019. *Shortage of applicants with knowledge or skills* increased significantly from previous years, from 47 percent in 2019 and 2020, to 60 percent in 2021, and 65 percent in 2023. *Economic conditions* as a barrier to employment decreased from 37 percent in 2021 to 30 percent in 2023. Similarly, fewer employers encountered *government policies or regulations* as a barrier to expanding employment, dropping from 30 percent in 2021 to 13 percent in 2023.

Other significant barriers encountered in 2023 included *lack of childcare* and *transportation access,* with 21 percent of respondents reporting these as barriers to expanding employment.

The survey also asked employers to rate the importance of each barrier on a scale of one to five, with one being insignificant and five being critical. The highest weighted average response for any barrier cited this year was *lack of applicants overall,* getting an importance score of 4.05 out of 5. The next highest weighted response was *government policies or regulations* (3.88), followed by *shortage of applicants with knowledge or skills* (3.85). Although the share of employers choosing *government policies or regulations* as a barrier to employment expansion has decreased, for those that did encounter it, it was still a critical barrier. *Shortage of available training programs* dropped in importance from 3.98 in 2019 to 3.15 in 2023.

Barriers to Expanding Employment

Lack of applicants overall*
- 2023: 66%

Shortage of applicants with knowledge or skills
- 2023: 65%
- 2021: 60%
- 2020: 47%
- 2019: 47%

Economic conditions
- 2023: 30%
- 2021: 37%
- 2020: 22%
- 2019: 33%

Lack of access to childcare for your candidates
- 2023: 21%
- 2021: 22%
- 2020: 17%
- 2019: 16%

Lack of access to transportation access
- 2023: 21%
- 2021: 19%
- 2020: 16%
- 2019: 17%

Supply chain disruptions*
- 2023: 16%

Government policies or regulations
- 2023: 13%
- 2021: 30%
- 2020: 13%
- 2019: 23%

Shortage of available training programs
- 2023: 8%
- 2021: 13%
- 2020: 12%
- 2019: 14%

Lack of information regarding the occupation
- 2023: 9%
- 2021: 13%
- 2020: 9%
- 2019: 9%

Legend: 2023, 2021, 2020, 2019

***new for 2023**

Sixty-one percent of employers stated they were experiencing a *shortage of skilled applicants.* This is slightly lower than the 68 percent reported in 2021 and much higher than the 28 percent cited in 2019.

Are you Experiencing a Shortage of Skilled Applicants

Year	YES	NO
2023	61%	39%
2021	68%	32%
2019	28%	72%

Employers were asked about possible shortcomings of applicants. As in previous years, *poor work habits* is the most frequently cited shortcoming at 64 percent (68% in 2021 and 70% in 2019). Other top shortcomings include *lack of general business or industry knowledge* (55% in 2023, 58% in 2021, and 43% in 2019) and *lack of critical thinking and problem solving* (54% in 2023, 59% in 2021, and 49% in 2019).

Since 2019, large changes have occurred in two less frequently mentioned shortcomings – *inability to interact effectively with people of different cultures and socio-economic backgrounds* and *inability to pass a drug test or having a substance abuse issue.* In 2019, 44 percent of employers cited applicant's *inability to interact effectively with people of different cultures and socio-economic backgrounds* as a shortcoming. This dropped to 24 percent in 2021 and 2023. *Inability to pass drug test or has substance abuse issue* increased from 6 percent in 2019 to 30 percent in 2021 and 26 percent in 2023.

Applicant Shortcomings

Poor Work Habits
- 64% (2023)
- 68% (2021)
- 70% (2019)

Lack of General Business or Industry Knowledge
- 55% (2023)
- 58% (2021)
- 43% (2019)

Lack of Critical Thinking and Problem Solving
- 54% (2023)
- 59% (2021)
- 49% (2019)

Lack of Communication or Interpersonal Skills
- 48% (2023)
- 56% (2021)
- 55% (2019)

Unwillingness or Inability to Learn
- 41% (2023)
- 48% (2021)
- 38% (2019)

Lack of Technical Skills Specific to the Job
- 39% (2023)
- 49% (2021)
- 41% (2019)

Lack of Teamwork or Collaboration
- 36% (2023)
- 45% (2021)
- 45% (2019)

Lack of Basic Math Skills
- 28% (2023)
- 37% (2021)
- 33% (2019)

Lack of Basic Writing Skills
- 27% (2023)
- 38% (2021)
- 43% (2019)

Inability to Pass Drug Test or has Substance Abuse Issue
- 26% (2023)
- 30% (2021)
- 6% (2019)

Lack of General Computer Skills
- 24% (2023)
- 29% (2021)
- 25% (2019)

Inability to Interact with Diff. Cultures/Socio-Econ. Backgrounds
- 24% (2023)
- 24% (2021)
- 44% (2019)

Inability to Understand Written & Graphical Info.
- 21% (2023)
- 35% (2021)
- 26% (2019)

Question not asked in 2020

Legend: ■ 2023 ■ 2021 ■ 2019

Employers were also asked to rate importance of each shortcoming on a scale of one to five, with one being insignificant and five being critical. *Poor work habits* was the most cited shortcoming and also ranked as the most important, with an average importance score of 4.19 out of 5.0. *Poor work habits* was also ranked the highest shortcoming in 2019 and 2021. Other high-ranking shortcomings are *unwillingness or inability to learn* (4.04) and *inability to pass a drug test* (3.98).

Importance of Applicant Shortcomings

	2023	2021	2019
Poor Work Habits	4.19	4.32	4.41
Unwillingness or inability to Learn	4.04	3.76	4.01
Inability to Pass a Drug Test	3.98	3.80	4.12
Lack of Teamwork or Collaboration	3.92	3.77	4.10
Lack of Comm. or Interpersonal Skills	3.89	3.74	3.97
Lack of Critical Thinking and Problem Solving	3.87	3.77	3.81
Inability to Interact with Different Cultures or Socio-Economic Backgrounds	3.86	3.30	3.73
Lack of Tech. Skills Specific to the Job	3.72	3.46	3.44
Lack of Basic Math Skills	3.68	3.32	3.58
Inability to Understand Written & Graphical Information	3.58	3.25	3.70
Lack of Writing Skills	3.48	3.13	3.48
Lack of General Business or Industry Knowledge	3.41	3.33	3.27
Lack of General Computer Skills	3.31	2.93	3.50

Sixty-one percent of employers stated they were experiencing a *shortage of skilled applicants.* This is slightly lower than the 68 percent reported in 2021 and much higher than the 28 percent cited in 2019.

Are you Experiencing a Shortage of Skilled Applicants

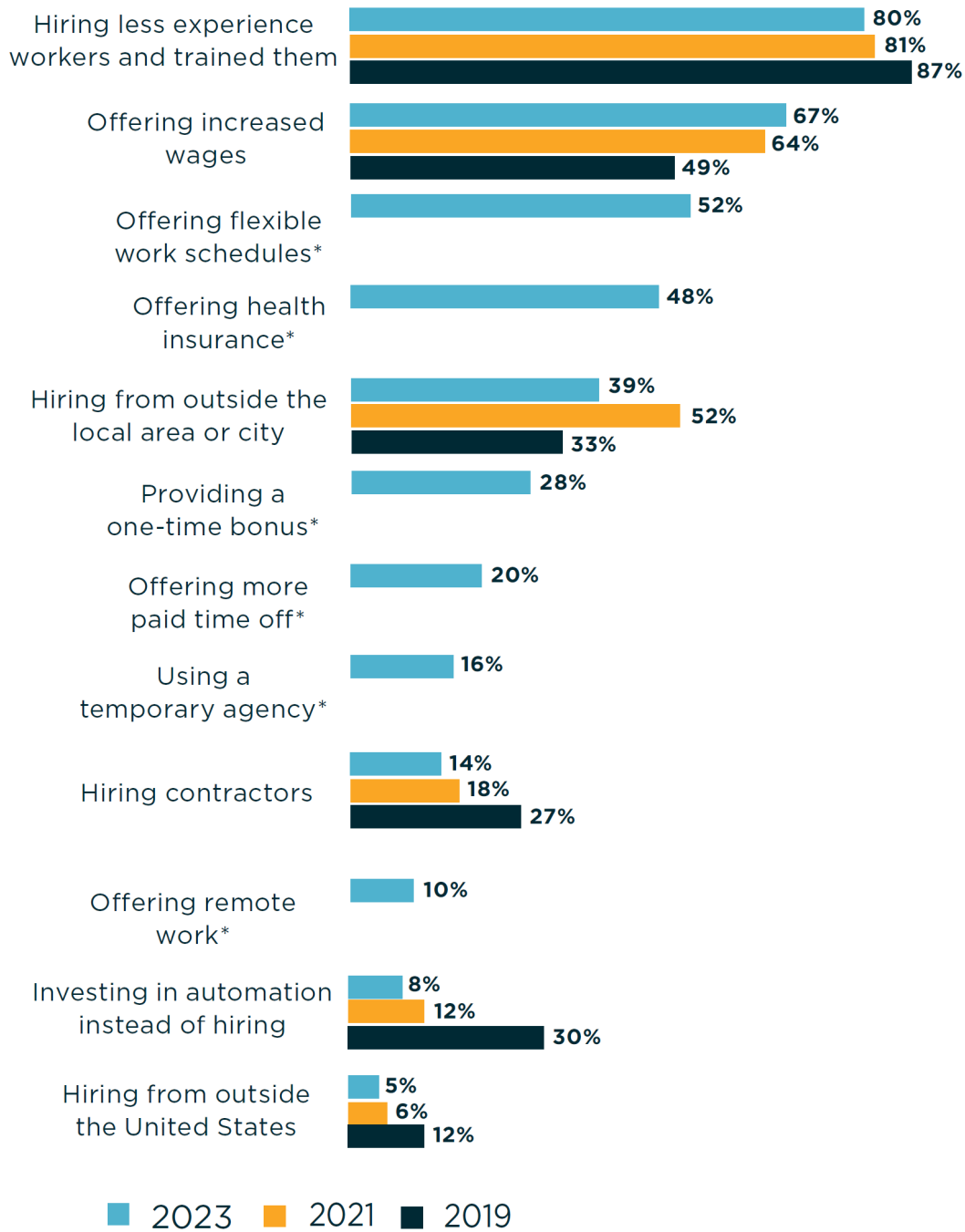|	2023	2021	2019
NO	39%	32%	72%
YES	61%	68%	28%

Employers take a variety of measures to address these shortages. Following the trend of previous years when this question was asked from the employers, 80 percent of the respondents reported *hiring less experienced workers and train* them as a measure to address skill shortages in the applicants (81% in 2021 and 87% in 2019). Other popular remedial measures were *offering increased wages* (67%) and *offering flexible work schedules* (52%). *Offering increased wages* rose as a remedial

measure from 49 percent of respondents in 2019 to 64 percent in 2020 and 67 percent in 2023. Some less widely used measures, such as *investing in automation instead of hiring, hiring from outside the United States*, and *hiring contractors,* have decreased over the last four years.
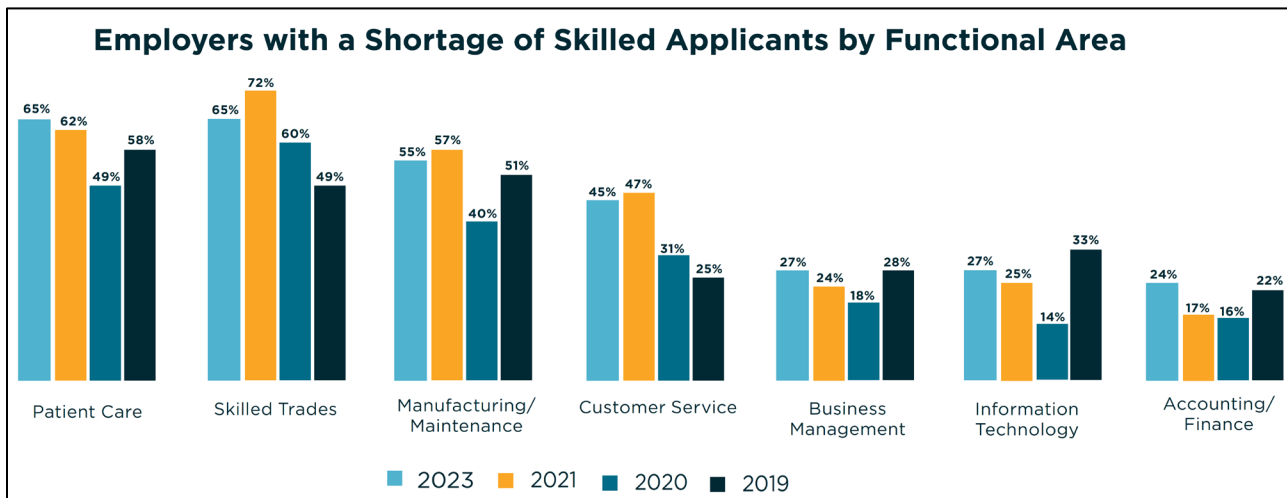
Investing in automation instead of hiring decreased from 30 percent in 2019 to 8 percent in 2023, *hiring from outside the United States* decreased from 12 percent in 2019 to 5 percent in 2023, and *hiring contractors* went from 27 percent in 2019 to 14 percent in 2023. Other remedial measures to alleviate the shortage of skilled applicants that were included in the 2023 survey were *offering flexible work schedules* (52%), *offering health insurance* (48%), *providing a one-time bonus* (28%), *offering more paid time off* (20%), *using a temporary agency* (16%), and *offering remote work* (10%).

Measures Taken to Address the Shortage of Skilled Applicants

Hiring less experience workers and trained them
- 2023: 80%
- 2021: 81%
- 2019: 87%

Offering increased wages
- 2023: 67%
- 2021: 64%
- 2019: 49%

Offering flexible work schedules*
- 2023: 52%

Offering health insurance*
- 2023: 48%

Hiring from outside the local area or city
- 2023: 39%
- 2021: 52%
- 2019: 33%

Providing a one-time bonus*
- 2023: 28%

Offering more paid time off*
- 2023: 20%

Using a temporary agency*
- 2023: 16%

Hiring contractors
- 2023: 14%
- 2021: 18%
- 2019: 27%

Offering remote work*
- 2023: 10%

Investing in automation instead of hiring
- 2023: 8%
- 2021: 12%
- 2019: 30%

Hiring from outside the United States
- 2023: 5%
- 2021: 6%
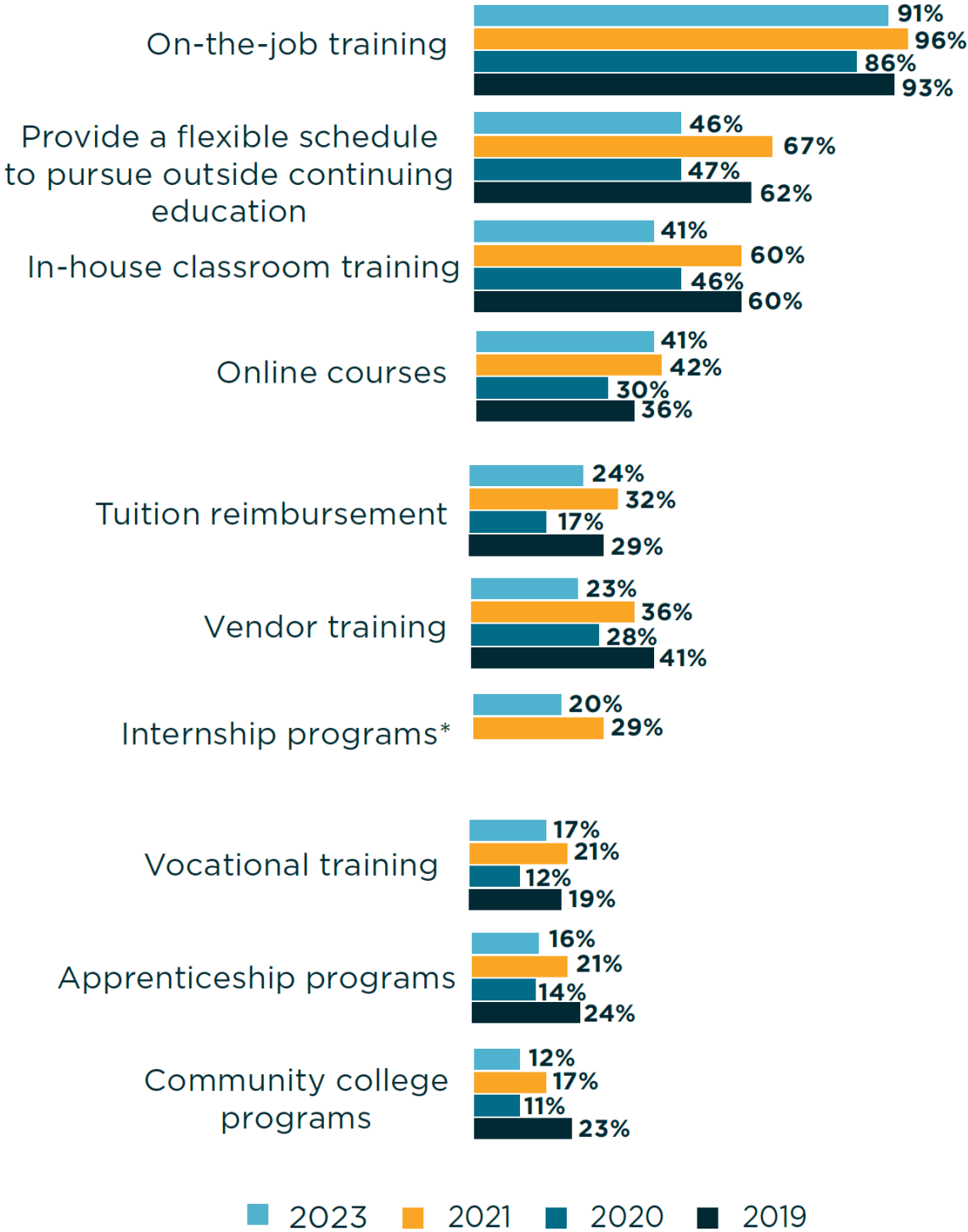- 2019: 12%

Legend: 2023, 2021, 2019

*new for 2023
Note: Question not asked in 2020

Companies employ workers in a variety of functional areas with different work responsibilities. *Patient Care* and *Skilled Trades* functional areas had the largest percentage of employers reporting shortages of skilled applicants at 65 percent each. Skill shortages in *Customer Service* have increased substantially, increasing from 25 percent in 2019 and 31 percent in 2020, to 47 percent in 2021, decreasing slightly to 45 percent in 2023.

Employers with a Shortage of Skilled Applicants by Functional Area

Functional Area	2023	2021	2020	2019
Patient Care	65%	62%	49%	58%
Skilled Trades	65%	72%	60%	49%
Manufacturing/Maintenance	55%	57%	40%	51%
Customer Service	45%	47%	31%	25%
Business Management	27%	24%	18%	28%
Information Technology	27%	25%	14%	33%
Accounting/Finance	24%	17%	16%	22%

To address the problem of skill shortages in the current workers, employers use several remedial measures, and *on-the-job-training* remains the most preferred method. Over 9 in 10 employers (91%) stated they used *on-the-job training* to assist current workers in addressing the need for new or increased skills. However, there is a significant decrease in applying these remedial measures in 2023 when compared to 2021, most significantly in *providing a flexible schedule to pursue outside continuing education* (67% in 2021 vs. 46% in 2023) and *in-house classroom training* (60% in 2021 vs. 41% in 2023).

Methods to Assist Workers for New or Increased Skills

On-the-job training
- 2023: 91%
- 2021: 96%
- 2020: 86%
- 2019: 93%

Provide a flexible schedule to pursue outside continuing education
- 2023: 46%
- 2021: 67%
- 2020: 47%
- 2019: 62%

In-house classroom training
- 2023: 41%
- 2021: 60%
- 2020: 46%
- 2019: 60%

Online courses
- 2023: 41%
- 2021: 42%
- 2020: 30%
- 2019: 36%

Tuition reimbursement
- 2023: 24%
- 2021: 32%
- 2020: 17%
- 2019: 29%

Vendor training
- 2023: 23%
- 2021: 36%
- 2020: 28%
- 2019: 41%

Internship programs*
- 2023: 20%
- 2021: 29%

Vocational training
- 2023: 17%
- 2021: 21%
- 2020: 12%
- 2019: 19%

Apprenticeship programs
- 2023: 16%
- 2021: 21%
- 2020: 14%
- 2019: 24%

Community college programs
- 2023: 12%
- 2021: 17%
- 2020: 11%
- 2019: 23%

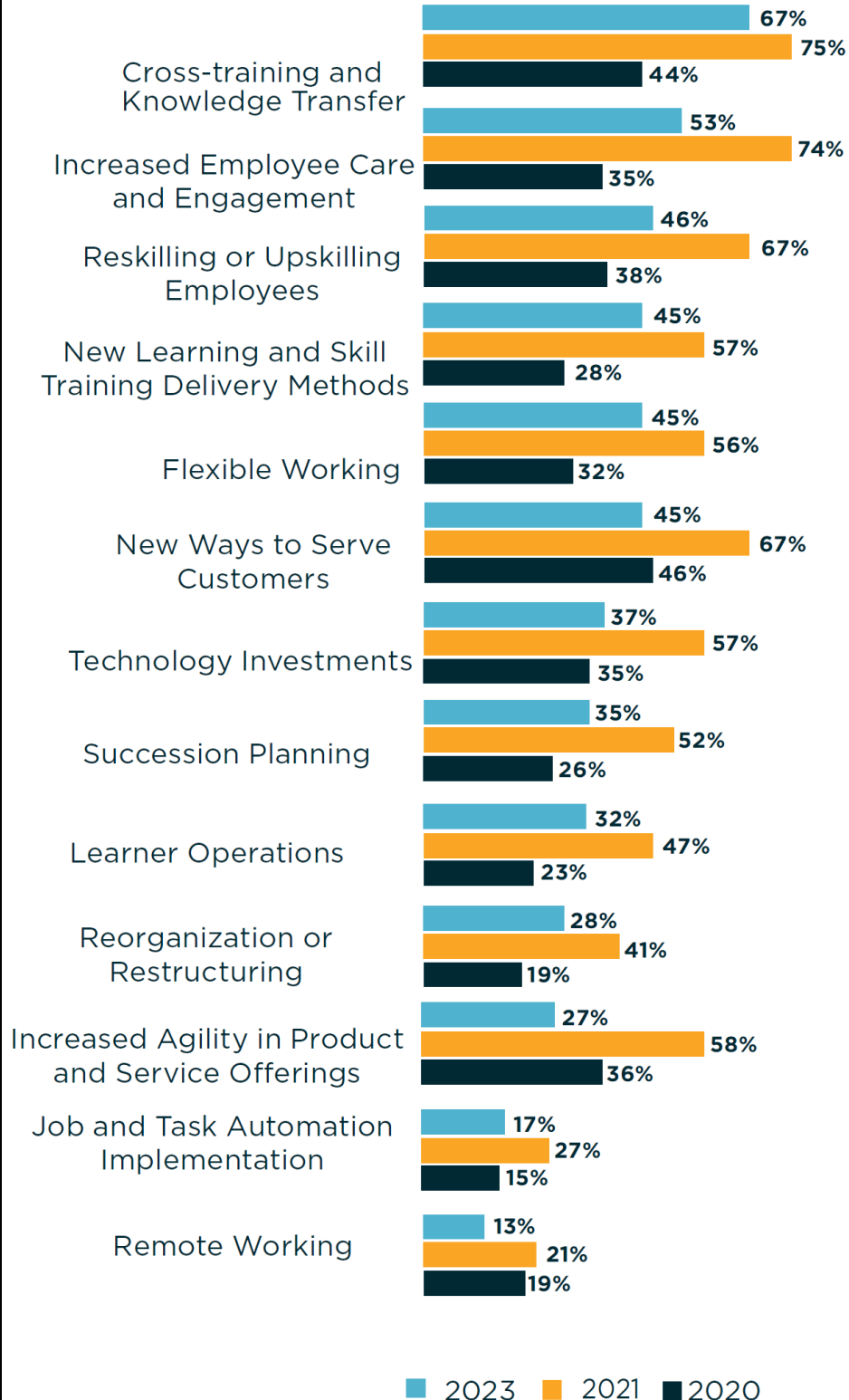Legend: ■ 2023 ■ 2021 ■ 2020 ■ 2019

*new in 2021

As the economy evolves, customer and workforce needs change. Now more than ever businesses have to adapt to attract and retain quality employees, as well as serve customer's changing needs. Employers were asked which workforce initiatives they were considering for the next year.
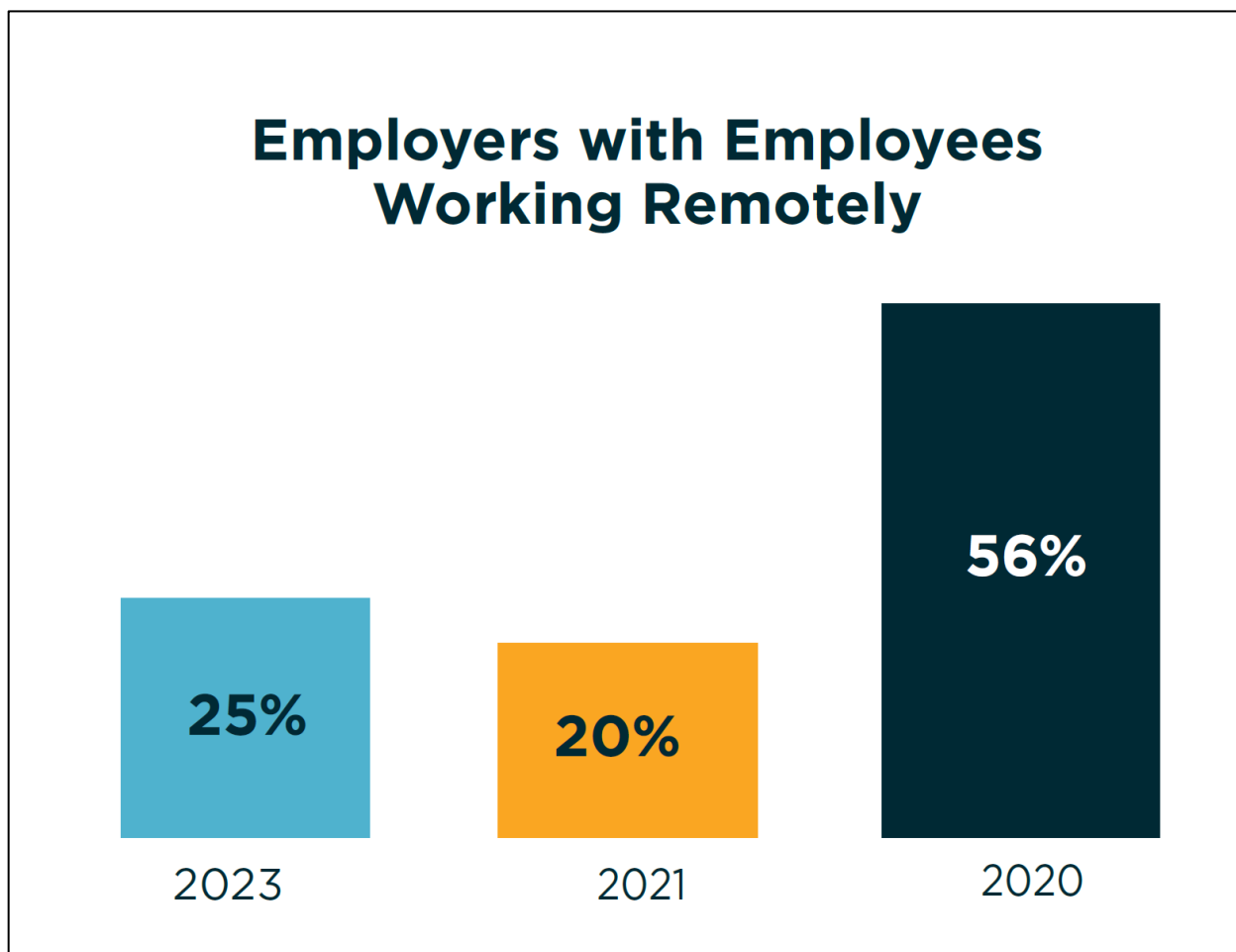
Employer's likelihood to consider a variety of initiatives has changed significantly over the last three years. From 2020 to 2021, a large number of employers were considering these workforce initiatives. However, from 2021 to 2023, responses were lower for almost all initiatives. The *remote working* option decreased significantly from 21 percent in 2021 to 13 percent in 2023, indicating a return to physical/centralized workspaces.

The top workforce initiative considered for the next year by employers was *cross-training and knowledge transfer* (67%), followed by *increased employee care and engagement* (53%) and *reskilling or upskilling employees to new ways of working* (46%).

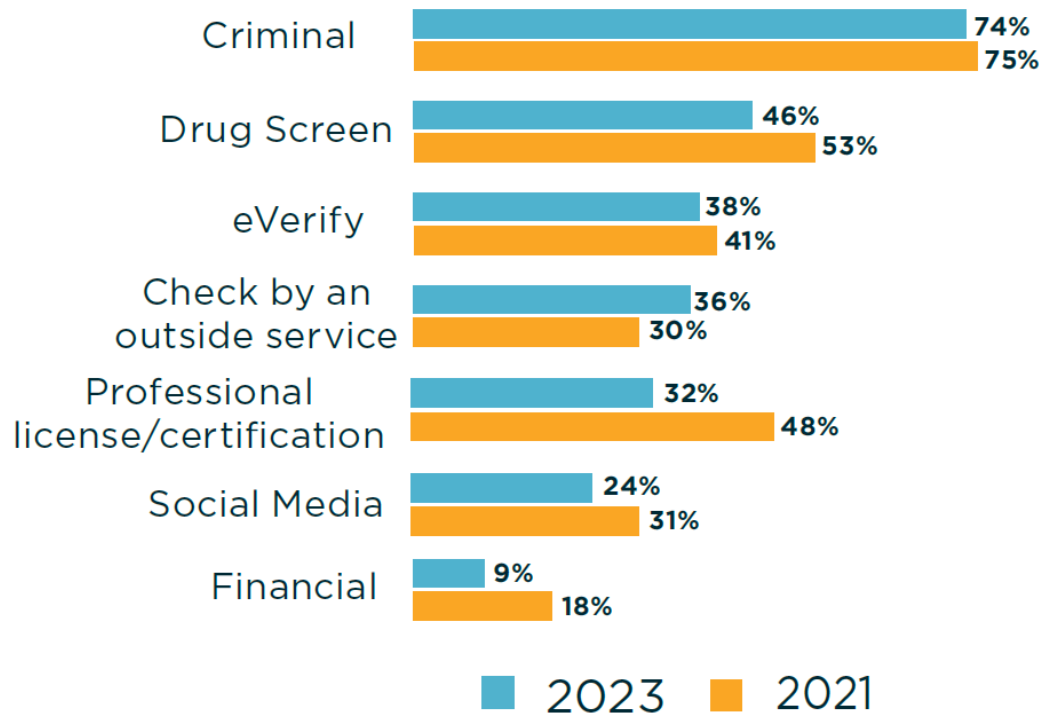# Workforce Initiatives Considered for the Next Year

Cross-training and Knowledge Transfer
- 2023: 67%
- 2021: 75%
- 2020: 44%

Increased Employee Care and Engagement
- 2023: 53%
- 2021: 74%
- 2020: 35%

Reskilling or Upskilling Employees
- 2023: 46%
- 2021: 67%
- 2020: 38%

New Learning and Skill Training Delivery Methods
- 2023: 45%
- 2021: 57%
- 2020: 28%

Flexible Working
- 2023: 45%
- 2021: 56%
- 2020: 32%

New Ways to Serve Customers
- 2023: 45%
- 2021: 67%
- 2020: 46%

Technology Investments
- 2023: 37%
- 2021: 57%
- 2020: 35%

Succession Planning
- 2023: 35%
- 2021: 52%
- 2020: 26%

Learner Operations
- 2023: 32%
- 2021: 47%
- 2020: 23%

Reorganization or Restructuring
- 2023: 28%
- 2021: 41%
- 2020: 19%

Increased Agility in Product and Service Offerings
- 2023: 27%
- 2021: 58%
- 2020: 36%

Job and Task Automation Implementation
- 2023: 17%
- 2021: 27%
- 2020: 15%

Remote Working
- 2023: 13%
- 2021: 21%
- 2020: 19%

Legend: ■ 2023 ■ 2021 ■ 2020

Since the COVID-19 pandemic, there has been an increased interest in understanding remote work. Prior to pandemic, (February 2020) about 15 percent employers were having some workers working remotely. Remote work peaked in 2020 during the height of the pandemic, with over half of employers (56%) stating they had some workers working remotely, either full or part-time. This dropped significantly to 20 percent in 2021 and has increased slightly to 25 percent in 2023. When asked if they expected the number of remote workers to change over time, the vast majority (92%) of employers said they expected it to stay the same. In the question about workforce initiatives considered in the coming year, 13 percent of employers indicated considering *remote work.*

Employers with Employees Working Remotely

Employers may perform a variety of screening processes before hiring an employee. *Criminal checks* were the most common types of background checks conducted prior to hiring, with 74 percent of Missouri employers reporting they perform one. *Drug screens* were next at 46 percent. In 2023, background screenings involving *professional license or certification, social media, drug screen, and financial checks* decreased significantly from 2021.
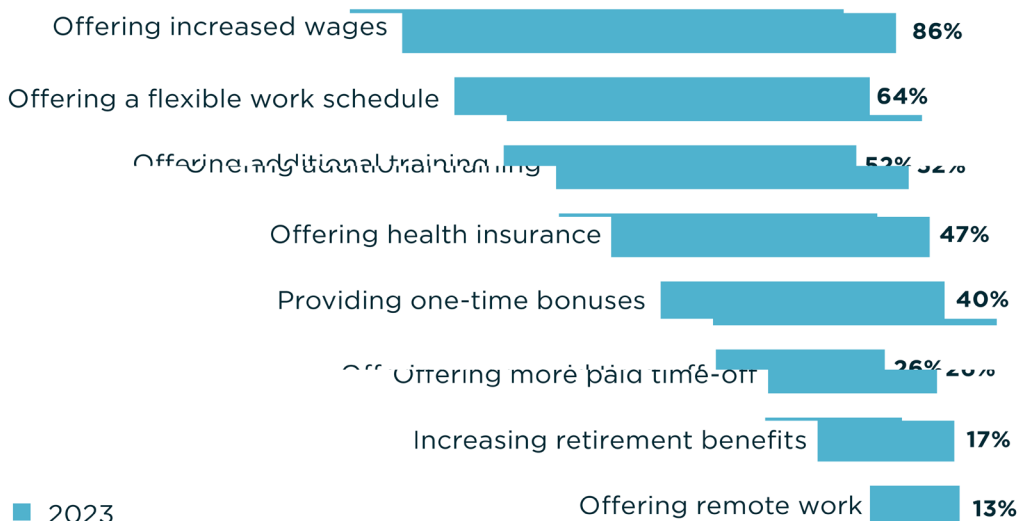
Background checks required prior to hire

Category	2023	2021
Criminal	74%	75%
Drug Screen	46%	53%
eVerify	38%	41%
Check by an outside service	36%	30%
Professional license/certification	32%	48%
Social Media	24%	31%
Financial	9%	18%

■ 2023 ■ 2021

In 2019, less than one percent of Missouri employers *would not consider* hiring an applicant convicted of a felony offense who had completed his or her sentence and/or probation. This increased to 20 percent in 2020, was at 19 percent in 2021 and decreased slightly to 16 percent in 2023. Most employers (62%) reported it would *depend on the nature of the felony and time of the offense*, a significant increase from previous surveys Employers responding they would *consider for any job they are qualified for* decreased from 17 percent in 2020 and 2021 to 10 percent in 2023.

Hiring Justice-Involved Applicants

Depends on the nature of the felony and the time of the offense
- 62% (2023)
- 49% (2021)
- 51% (2020)
- 41% (2019)

Would not consider for any position
- 16% (2023)
- 19% (2021)
- 20% (2020)
- <1% (2019)

Would consider for some jobs
- 12% (2023)
- 14% (2021)
- 12% (2020)
- 43% (2019)

Would consider for any job they are qualified for
- 10% (2023)
- 17% (2021)
- 17% (2020)
- 15% (2019)

Legend: 2023 | 2021 | 2020 | 2019
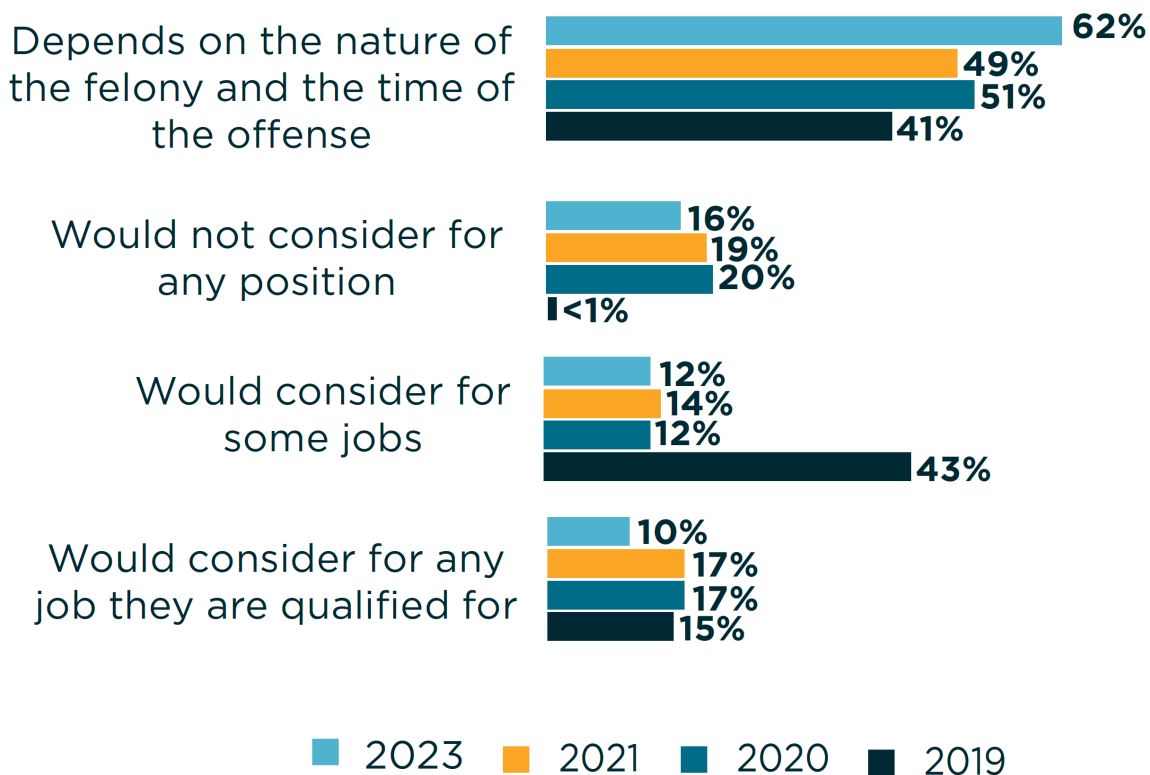
The top strategies used by employers in the last 12 months to retain existing workers included *offering increased wages* (86%), *offering a flexible work schedule* (64%), and *offering additional training* (52%). *Remote work* was listed as a strategy by only 13 percent of employers. When asked, "Have you increased wages in the last 12 months," 89 percent of employers said yes. Of the employers who increased wages, the average increase was 11 percent.

Strategies used to retain existing workers in the last 12 Months

- Offering increased wages — 86%
- Offering a flexible work schedule — 64%
- Offering additional training — 52%
- Offering health insurance — 47%
- Providing one-time bonuses — 40%
- Offering more paid time-off — 26%
- Increasing retirement benefits — 17%
- Offering remote work — 13%

Legend: 2023

E) **"Establish administrative cost arrangements, including the pooling of funds for administrative costs, as appropriate, in order to meet the Region's needs"**

At this time the establishment of administrative cost arrangements, including the pooling of funds for administrative costs is not appropriate or needed for the St. Louis Region.

F) **"The Regional Plan will address the coordination of transportation and other supportive services, as appropriate, for the region and must address how individuals will be served given differing local Supportive Service policies"**

Supportive service awards, whether for adult, dislocated worker, or youth participants are intended to enable enrolled individuals to participate in workforce-funded programs and activities to secure and retain employment. Based on individual assessment and availability of funds, supportive services such as transportation, childcare, dependent care, and needs-related payments, may be awarded to eligible participants on an as-needed basis according to the administering Area's Supportive Service Policy.

Local Areas may call other Areas within the Region when funds are limited to collaborate on providing supportive service. For instance, if a participant from one Area is offered an On-the-Job Training position at an employer located in another Area, the two Areas may work together to provide the training and/or supportive service.

Local Areas agree to note services provided to each participant, including Supportive Service, in the State's case management system. This ensures no duplication of service.

G) **"The coordination of services with regional economic development services and providers…."**

The six LWDAs are collaborating with the following to coordinate services with regional economic development services and providers:

The Greater STL, East-West Gateway Council of Governments, St. Charles County Chambers, St. Louis Economic Development Partnership, the Leadership Council Southwestern Illinois, EDC Business & Community Partners St. Charles County, St. Louis Development Corporation and the Missouri Partnership.

The LWDAs participate in planning meetings and regional economic development events. LWDAs use data, analysis and reports from such economic planners as those mentioned above in Section D of this document to ensure service and expenditure Plans address the coordination.

H) **"Establish an agreement concerning how the planning region will collectively negotiate and reach agreement with the Governor on local levels of performance for and report on the performance accountability measures described in Section 116(c) for the local areas or the planning region…."**

The St. Louis Region has collaboratively developed a negotiation agreement for the Planning Region. In accordance with and allowed in OWD Issuance 09- 2019, the Local Boards in this region elect to negotiate and report performance independently.

The St. Louis Metropolitan Regional Directors' Consortium Coordination Strategy

The six individual WIOA local regions that make up the St. Louis Metropolitan Region agree to the following service strategies:

1. Act as regional steering committee made up of at least the Local Area WIOA Directors.
    - The Committee will meet on a regular basis to share information on new initiatives, as well as, challenges found in the Region.
    - This committee will provide a forum for local areas to solve problems of common concern, develop and implement joint strategies and/or policies.
2. Build consensus around broad goals and strategies.
    - Shared goals to be discussed may be to increase the proportion of households in the region earning a family-supporting wage, decreased long-term reliance on income subsidies or to address the specific skill and talent needs of local industries/sectors.
    - The Region originally selected manufacturing and healthcare as the first sectors in our joint sector strategy initiative as required by WIOA. Recently, the Region has added Information Technology (IT) as its third sector initiative. The strategies developed to address the workforce needs of the two original sectors will continue to be implemented and updated. The Region will work together to develop new initiatives to meet the expanding needs of the IT sector in the St. Louis Metropolitan Region.
    - The regional collaboration will provide a clearinghouse for labor market information by linking existing resources, researching information gaps and marketing local assets.
    - The Region has begun to accomplish this by sharing workforce events in a calendar format, email blasts and through social media.
    - The Region conducts meetings of business team representatives across the Region to coordinate services to employers and avoid duplication of effort.
    - The Region also has a disability committee that crosses several local areas and invites all areas to participate, as appropriate, in service to this population.
    - Build closer alliances with local, regional and state economic development agencies to create more integration between business recruitment/retention efforts and workforce issues.
3. Develop a shared understanding of the region's customer base.
    - Work together to collect industry sector analysis throughout the Region.
    - Each area will report how local businesses are meeting their workforce needs.
    - Identify skills, talents and aptitudes of the local workforce areas.
    - Identify skill gaps as well as gaps in local systems to address the training needs.
    - Collect information on common barriers to skill attainment and employment.
4. Forge linkages between workforce development and other work-related systems
    - Identify resources outside the workforce system that can address individuals' barriers to employment.

- Identify resources outside the workforce system that can affect the growth or decline of local industries.
- Invite outside entities to collaborate on initiatives across the Region.
- Work to influence and align educational curriculum and career preparation between K-12, college, and vocational institutions with the workforce needs of growing business sectors in our region.

5. Building on the current Department of Labor funded initiative called Gateway Apprenticeship Hub, coordinate across regional individual WIOA local regions to support the expansion and utilization of apprenticeship as a regional workforce strategy and pursue joint funding opportunities to support sustaining this initiative.

St. Louis
Community
College

2023 STATE OF THE ST. LOUIS
WORKFORCE

Foreword

If we thought that getting past the pandemic would allow us to return to "normal", we were wrong. Our business models and assumptions were tossed out the window when the uncertainty of the pandemic arrived in 2020. COVID gave us an excuse for not knowing what was going to happen next.

Now, both employers and workers have stepped into the post-COVID world, and it feels anything but normal. The world didn't stand still, and instead has handed us a different set of circumstances and challenges, both for our organizations and for our workforce.

Record low unemployment. Supply chain issues persisting. Wage increases to attract and retain workers. Inflation. Increasing interest rates. An aging workforce. Lower birth rates. Cities with flat growth rates. A future with a smaller workforce. Youth rethinking student debt. Employers contemplating how to hire, retain and train a workforce differently.

Workers laid off during the pandemic, now seeking job security. Workers that were trapped in front line jobs, now seeking careers with more choices for remote work, advancement and pay. Workers wanting flexibility. Workers choosing family time over a second job, either by choice or by necessity when child or elder care is unavailable. Workers wanting a career path instead of a job. Workers tired of living paycheck to paycheck, now seeking a better future.

It is a new day for all of us.

St. Louis Community College's mission continues to guide our next steps through three key pillars: preparing students for transfer to four-year universities, creating lifelong education for our community, and educating students to directly enter the workforce in the core industries of the St. Louis region. We continually expand our range of partnerships to reach both high school students and adult learners, and to be that next step in training and education towards a new career and a new life.

The future of our college itself is being shaped right now through **STLCC Transformed**. This immense effort involves the construction of six new state-of-the-art buildings within two years that will bring cutting-edge training facilities to our region's workforce in healthcare, IT, transportation and advanced manufacturing. We are excited to bring these new resources to our four campuses across St. Louis City and County.

Jeff Pittman, Ph.D.
Chancellor
St. Louis Community College

Phyllis Ellison, M.B.A.
Associate Vice Chancellor
St. Louis Community College
Workforce Solutions Group

The *2023 State of the St. Louis Workforce* report again focuses on the comprehensive overview of the regional economic and workforce trends. The report will add a highlight on an individual sector each year to track trends in a specific industry that is key to the region, and therefore key to STLCC's education and training efforts. This report includes a spotlight on advanced manufacturing, a pillar of our region and gateway to future economic growth and jobs. The St. Louis area holds 42% of Missouri's jobs in advanced manufacturing.

The 2023 *State of the St. Louis Workforce* report continues to be supported by the partnership of our region's top economic and workforce institutions. Along with the assistance of our longtime partners at the Missouri Economic Research and Information Center (MERIC), we appreciate the collaboration with the Federal Reserve Bank of St. Louis and the *St. Louis Business Journal*. Partnerships with MOSourceLink and TechSTL, along with research from Sarah Coffin, Ph.D., AICP, add details on specific industry sectors for our report.

The report includes labor market information from public sources such as the Bureau of Labor Statistics and the Census Bureau. Additional information is provided by analytical tools such as Chmura JobsEQ and Lightcast™ to provide insight on trends and forecasts. We also appreciate the continued support of our workforce development collaborators, including the Regional Business Council and the Missouri Chamber of Commerce and Industry, for their involvement in this report.

We would like to thank and acknowledge our employers, our research partners, and our media partner, without whom we would not be able to bring this informative report to the region. We hope that you find the report valuable and use its findings for the benefit of your organization and our community.

Contents
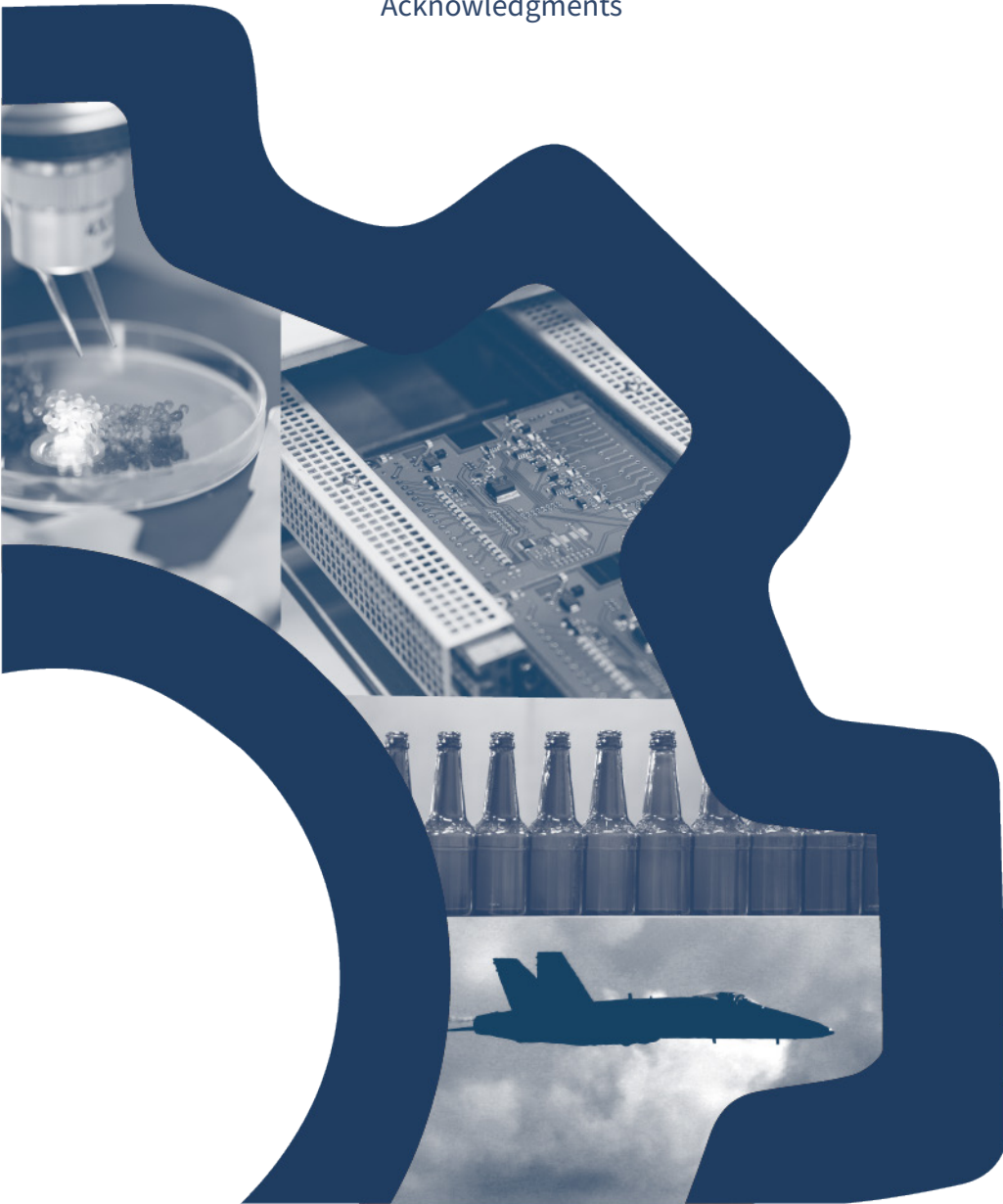
NAICS	Category Description	Businesses Surveyed	Percent
NAICS 23	Construction	35	5.8%
NAICS 31-33	Manufacturing	29	4.8%
NAICS 42	Wholesale trade	29	4.8%
NAICS 44-45	Retail trade	88	14.7%
NAICS 48-49	Transportation and warehousing	12	2.0%
NAICS 51	Information	17	2.8%
NAICS 52	Finance and insurance	34	5.7%
NAICS 53	Real estate and rental and leasing	21	3.5%
NAICS 54	Professional and technical services	65	10.8%
NAICS 56	Administrative and waste services	25	4.2%
NAICS 61	Educational services	6	1.0%
NAICS 62	Health care and social assistance	95	15.8%
NAICS 71	Arts, entertainment, and recreation	15	2.5%
NAICS 72	Accommodation and food services	64	10.7%
NAICS 81	Other services	59	9.8%
	Other small sectors and unclassified*	6	1.0%
	Total	600	100.00%

Methodology

The 2023 *State of the St. Louis Workforce* report includes four distinct sections: The St. Louis Economy, a compilation of labor market information using public and proprietary sources and tools; the Employer Survey; and two Spotlight sections, focusing on Startups and Advanced Manufacturing.

St. Louis Economy

This section includes an analysis of available data from public sources, such as the United States Bureau of Labor Statistics and the United Sates Census Bureau, which describes the characteristics of the labor force and correlates unemployment with various labor force demographics. Analysis of real-time labor market demand is aggregated through the proprietary Lightcast™ tool, which searches web-based job boards to discern the level of demand for certain occupations, and the skills and certifications that employers are requesting.

Employer Survey

The State of the St. Louis Workforce report relies heavily on first-person telephonic interviews of regional employers. Each of the 2023 survey interviews averaged 19 minutes to complete. During May and June, 2023, 600 local companies in 16 industry categories were surveyed. These companies covered the 23 two-digit North American Industry Classification System (NAICS) codes that represent a composite picture of the St. Louis regional economy.

Survey respondents were asked 19 questions, some with multiple parts, related to hiring trends, job applicants, and skill needs. Companies interviewed for the survey were selected randomly within each of the 16 industry categories from a categorized list of the 40,430 businesses in the St. Louis Metropolitan Statistical Area (MSA) that employed five or more employees from the *Reference USA* employer database provided by the Missouri Economic Research and Information Center (MERIC). The survey instrument is provided in the Appendix to this report.

Spotlight on…

This year's report highlights two key aspects of our regional economy with additional data and analysis: startups and the jobs they create, and the advanced manufacturing sector.

Spotlight on Startups explores the creation of first-time jobs in the St. Louis region. Through analysis supplied by MOSourceLink, this section showcases the number of new firms and the new first-time jobs that they create on the Missouri portion of the St. Louis MSA.

For this identification of new jobs, a new startup is identified with the first appearance of firm records in the employer file in the Quarterly Census of Employment and Wages (QCEW). Individual records of wages paid for Unemployment Insurance serves as the trigger for identifying new jobs.

In this method, new startups are new establishments. Only employees that were hired for wages paid for Unemployment Insurance are counted as employees, whether full-time or part-time, and do not include those who are self-employed or contract employees.

The *Spotlight on Advanced Manufacturing* section focuses on the size of the industry in the region, its workforce, and the future opportunities and challenges it faces.

St. Louis Economy

The bi-state St. Louis, Missouri-Illinois Metropolitan Statistical Area (MSA) includes 16 counties in Missouri and Illinois with an estimated population of over 2.8 million.

St. Louis MSA Job Count by County

Calhoun 620

Macoupin 8,845

Jersey 4,469

Lincoln 11,308

Bond 4,043

Madison 91,272

Warren 7,053

St. Charles 139,465

St. Louis County 575,927

Clinton 10,797

Franklin 35,036

St. Clair 77,913

Jefferson 44,385

Monroe 7,704

St. Louis City 195,936

Powered by Bing
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Source: U.S. Census Bureau, OnTheMap Application, Primary Jobs (public and private sector) 2020.

According to the U.S. Bureau of Economic Analysis, in 2021, the area had a Gross Domestic Product (GDP) of $187 billion in current dollars (not adjusted for inflation). This was a strong recovery from $171 billion in 2020, and a significant increase over the pre-pandemic $175 billion in 2019. The industry with the highest GDP was Finance, Insurance, Real Estate, Rental & Leasing at $38 billion. Private Sector businesses accounted for 91% of the region's output, while Government accounted for the remaining 9%.

St. Louis MSA labor force of 1.3 million, increasing 6% from 2012 to 2022

Employment

The St. Louis MSA has a diverse economy with a labor force of over 1.3 million that work in a wide range of industries. Health Care & Social Assistance makes up 16% of total employment, followed closely by Wholesale & Retail Trade, which makes up 15% of total employment. Health Care & Social Assistance has increased by over 28,000, or 15% over the last 10 years. Other Services had the largest decrease, with employment declining by over 6,000, or 14%. Overall, the St. Louis economy increased by 77,627 employees (6%) from 2012 - 2022.

St. Louis Industry Employment

Industry	2022	2012
Health Care & Social Assistance	217,927	189,154
Wholesale & Retail Trade	205,687	207,329
Leisure & Hospitality	145,453	147,038
Manufacturing	118,792	108,011
Educational Services	102,981	106,826
Administrative & Support Services	91,238	86,562
Professional, Scientific, & Technical Services	88,830	74,072
Finance & Insurance	73,207	66,142
Construction	73,566	62,649
Transportation, Warehousing & Utilities	68,781	53,778
Management of Companies & Enterprises	39,959	39,035
Other Services	40,696	47,233
Public Administration	29,799	31,027
Information	28,797	31,930
Real Estate & Rental & Leasing	21,187	19,441
Agriculture, Forestry, Mining & Quarrying	4,668	3,712

Unemployment

Unemployment rates have remained steady over the past year, at 2.6 - 2.7%. Over the past year, unemployment rates for the St. Louis MSA have consistently been lower than the national rate, and higher as the state.

Seasonally Adjusted Unemployment Rate by Quarter
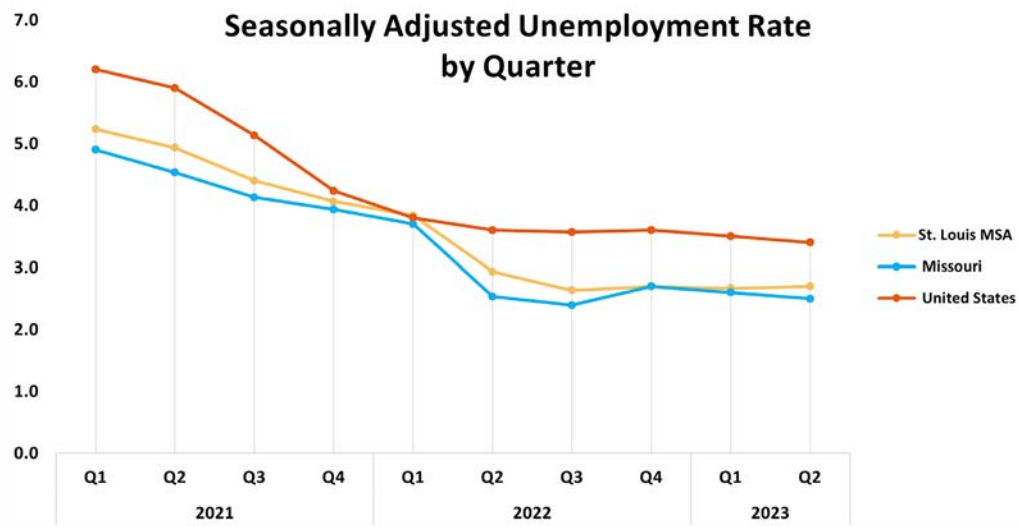
Unemployment Demographics

Unemployment rates vary greatly with age and sex. The largest differences in unemployment rates between males and females were in the youngest (15.3% for males vs. 11.2% in females) and oldest (3.4% for males vs. 10.1% for females) age groups. Unemployment rates between males and females were similar in the 25-29 and 35-59 age groups. In 2021, St. Louis MSA unemployment rates for all ages was 5% in males and 4.9% in females.

St. Louis MSA Unemployment Rates by Age and Sex

St. Louis MSA data for 2021 shows that unemployment rates decrease and income increases with additional education levels. A bachelor's degree or higher, compared to a high school diploma, reduces the unemployment rate by 4 percentage points and increases median earnings by $32,000 on average.
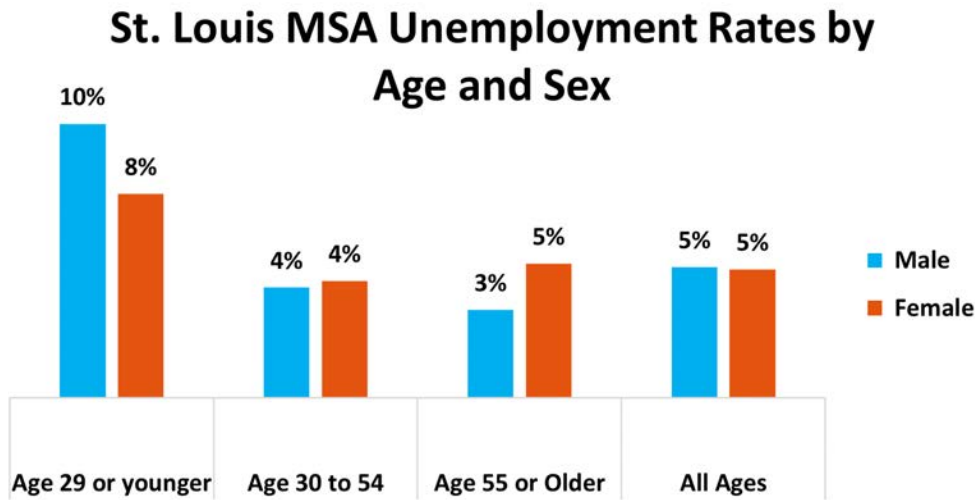
Unemployment Rates and Earnings
by Education Population 25 years and older

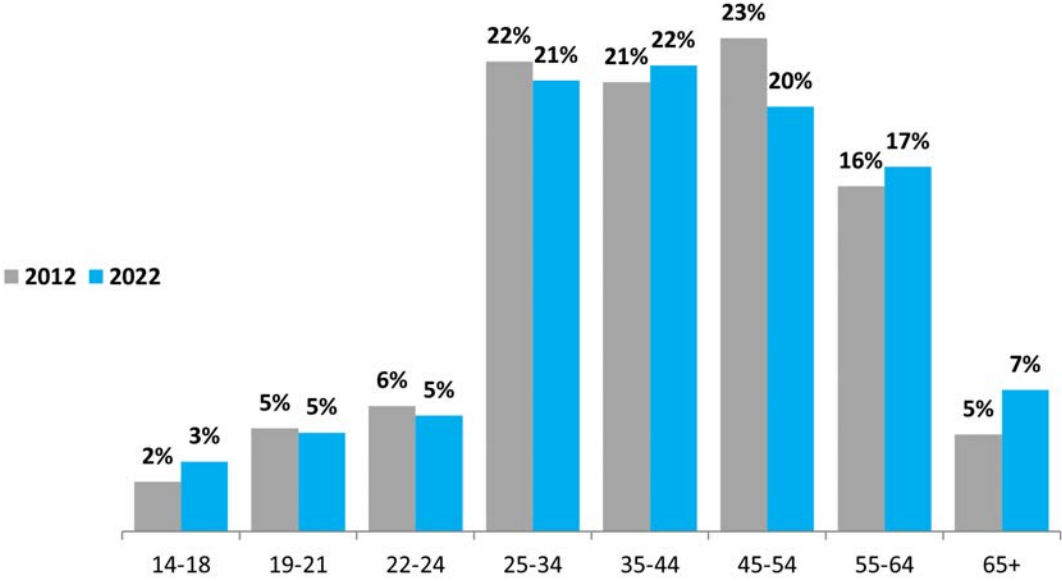|	Unemployment Rates	Educational Attainment	Median Earnings
Missouri	9.0%	Less than high school graduate	$26,315
	5.9%	High school graduate (includes equivalency)	$33,899
	4.2%	Some college or associate's degree	$39,481
	2.0%	Bachelor's degree or higher	$59,668
St. Louis MSA	12.4%	Less than high school graduate	$27,173
	6.1%	High school graduate (includes equivalency)	$35,603
	4.8%	Some college or associate's degree	$41,259
	2.1%	Bachelor's degree or higher	$67,803

*Bachelors ($53,855) and Graduate ($65,480) degree medians
Source: US Census Bureau, 2021 American Community Survey 1-year estimates.

The highest unemployment rates and lowest wages belong to workers with less than a high school education. Unemployment rates for those without a high school diploma or GED are two times higher than those with a high school diploma or equivalent, and nearly six times higher than individuals with a bachelor's degree or higher. Adding training or education significantly impacts employment options. Missouri shows similar trends, with workers who do not have a high school education having an unemployment rate of 9%, and those with a bachelor's degree or higher having a rate of 2%. Less experienced and/or less educated job seekers often have a more difficult time finding quality employment.

Workforce Demographics

In 2022, the 35-44 age group had the largest share of the workforce at 22%. The St. Louis age profile has changed over time with the 55+ age groups increasing as a share of the workforce, while the 45-54 age group share has decreased. The 55+ age groups have grown from 21% in 2012 to 25% in 2022. With one-fourth of the workforce age 55 or older, St. Louis follows the national trend of an aging workforce.

St. Louis MSA Age of the Workforce

Legend: 2012, 2022

Age Group	2012	2022
14-18	2%	3%
19-21	5%	5%
22-24	6%	5%
25-34	22%	21%
35-44	21%	22%
45-54	23%	20%
55-64	16%	17%
65+	5%	7%

Source: U.S. Census Bureau, QWI Explorer

Educational Attainment

Nearly one-half (47%) of the region's population age 25 and older have a high school diploma but no post-secondary degree. This is lower than the state rate of 52% and higher than the national rate of 45%. In St. Louis, 37% of workers hold a bachelor's degree or greater, which is higher than both the state (32%) and national (35%) rate.

Educational Attainment of the Population*

Legend: ■ St. Louis ■ Missouri

Category	St. Louis	Missouri
No High School diploma	7%	9%
High school diploma (or equivalent)	26%	30%
Some college, no degree	21%	21%
Associate degree	9%	8%
Bachelor's degree	22%	20%
Graduate or professional degree	15%	12%
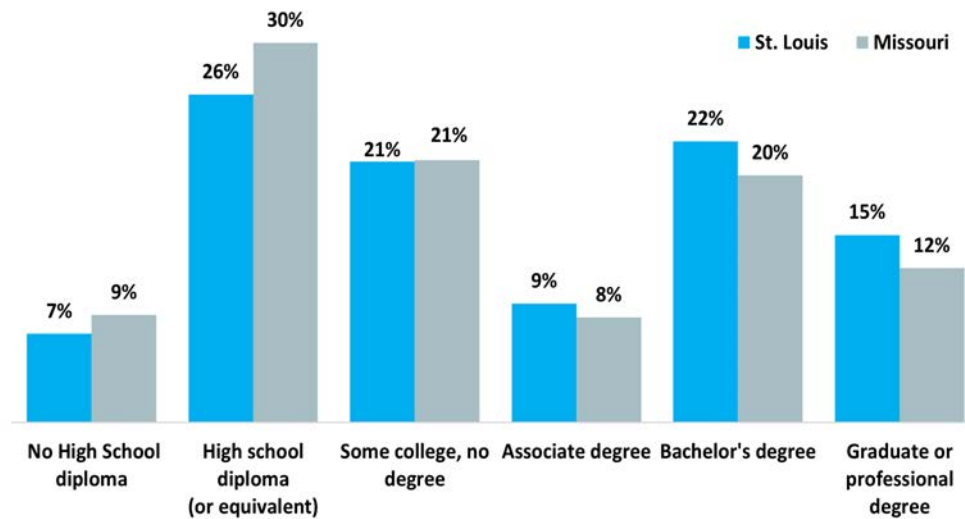
Source: U.S. Census Bureau, American Community Survey 2021 1-year estimates. Data accessed March 2023
*Population age 25 and older

Current Job Demand

One way to measure current employment demand is to track job postings. Over the past year, there were over 450,000 online job postings in the St. Louis MSA.

Of the online job postings for the St. Louis MSA from June 2022 to May 2023, the overall top-posted job was registered nurses (32,660) followed by retail salespersons (10,920) and software developers (10,540). Six of the top occupations were management jobs, and five were healthcare practitioners and support occupations.

Top Job Postings		
Now		
High School Education or Less and/or Short-Term Training		
SOC Code	**Occupation Title**	**Online Job Ads**
41-2031	Retail Salespersons	10,920
43-4051	Customer Service Representatives	7,850
35-3023	Fast Food and Counter Workers	6,960
53-7062	Laborers and Freight, Stock, and Material Movers, Hand	6,790
37-2011	Janitors and Cleaners	5,180
31-1120	Home Health and Personal Care Aides	5,170
43-6014	Secretaries and Administrative Assistants	4,470
37-2012	Maids and Housekeeping Cleaners	4,210
35-3031	Waiters and Waitresses	4,200
Next		
Moderate/Long-Term Training to Associate Degree		
SOC Code	**Occupation Title**	**Online Job Ads**
41-4012	Sales Representatives, Wholesale and Manufacturing	9,190
41-1011	First-Line Supervisors of Retail Sales Workers	8,520
53-3032	Heavy and Tractor-Trailer Truck Drivers	5,970
29-2061	Licensed Practical and Licensed Vocational Nurses	5,960
49-9071	Maintenance and Repair Workers, General	5,760
31-1131	Nursing Assistants	5,540
11-9051	Food Service Managers	5,340
Later		
Bachelor's Degree or Higher		
SOC Code	**Occupation Title**	**Online Job Ads**
29-1141	Registered Nurses	32,660
15-1252	Software Developers	10,540
15-1299	Computer Occupations, All Other	7,130
11-9199	Managers, All Other	6,390
11-9111	Medical and Health Services Managers	5,740
11-1021	General and Operations Managers	4,120
13-2011	Accountants and Auditors	4,040

Source: Jun. 1, 2022 - May 31, 2023 Lightcast™

Skills and Qualifications

In the St. Louis MSA, communications skills was the top demand of employers, requested in one-third (33%) of total job postings. Other top-demanded common skills included customer service, management, and leadership. Registered nurse was the occupation with the most job postings, and nursing was the top requested specialized skill, followed by marketing and auditing. Microsoft Office and its products such as Word, Excel, PowerPoint, and Access are the most requested software skills across all occupations and industries. Other top requested software and programming skills included *SQL, Python, and Java*.

Top Qualifications	Online Job Ads
Valid Driver's License	41,200
Registered Nurse (RN)	41,050
Basic Life Support (BLS) Certification	16,840
Licensed Practical Nurse (LPN)	10,560
Cardiopulmonary Resuscitation (CPR) Certification	10,540
Security Clearance	7,780
Certified Nursing Assistant (CNA)	6,450
Advanced Cardiovascular Life Support (ACLS) Certification	6,150
Secret Clearance	6,130
Commercial Driver's License (CDL)	4,090

Source: Jun. 1, 2022 - May 31, 2023 Lightcast™

" Retaining and growing a skilled workforce is key to overall job growth in the region.

As our population ages, it will be increasingly important to train younger workers to fill new roles so firms in the region can remain competitive."

Charles Gascon
Federal Reserve Bank of St. Louis

Top Common Skills	Online Job Ads
Communications	150,080
Customer Service	113,530
Management	98,660
Leadership	73,140
Operations	67,440
Sales	65,510
Detail Oriented	52,640
Problem Solving	50,630
Planning	48,340
Writing	44,190

Source: Jun. 1, 2022 - May 31, 2023 Lightcast™

Top Specialized Skills	Online Job Ads
Nursing	36,940
Marketing	25,090
Auditing	24,550
Merchandising	22,960
Data Entry	22,640
Accounting	20,500
Project Management	20,410
Computer Science	19,100
Machinery	18,990
Warehousing	18,600

Source: Jun. 1, 2022 - May 31, 2023 Lightcast™

Top Software Skills	Online Job Ads
SQL (Programming Language)	10,400
Python (Programming Language)	7,740
Java (Programming Language)	7,230
Spreadsheets	5,880
Operating Systems	5,290
Amazon Web Services	5,170
JavaScript (Programming Language)	5,080
Application Programming Interface (API)	4,870
JIRA	4,730
SAP Applications	4,710

Source: Jun. 1, 2022 - May 31, 2023 Lightcast™

Employer Survey

The 2023 employer survey marks the 15th annual telephone survey of companies throughout the St. Louis metropolitan area. Our goal is to understand the hiring trends, business climate, occupational skills, and demands from businesses across the St. Louis region. This year's survey included 600 companies in 16 employer categories across 23 industry segments as defined by the North American Industry Classification System (NAICS). These companies represent a composite picture of the regional industries and economy.

A statistically significant sample was surveyed from each of the industry categories for the St. Louis MSA. Geographically, the firms interviewed also represented the entire St. Louis MSA. The number of employers surveyed in each industry category are listed in the Methodology section.

Although the companies interviewed reflect a wide range of sizes as measured by number of employees, as with past years, the majority of the respondents for this year's survey consisted of small- and mid-sized businesses with fewer than 50 employees. Companies employing fewer than five employees were not selected for interview. (See the Spotlight on Startups section on page 37 for information on new jobs created by startups.)

Each employer was asked a series of 19 questions, several with multiple parts, to understand their hiring outlooks and challenges, as well as practices that either created barriers to, or opportunities for, employment and advancement.

Employment Size of Firms Surveyed

45%

36%

19%

■ 5 to 10 ■ 11 to 49 ■ 50 or more
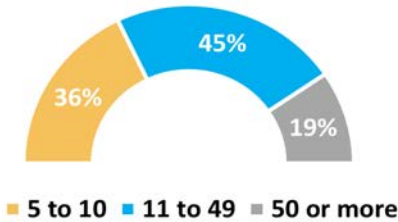
This year's survey continued to pose questions that examine partnerships to help firms source talent, work-based learning experiences for students and young adults, and Diversity, Equity and Inclusion (DEI) initiatives. The specific survey questions are provided in the Appendix.

Hiring Trends

The high level of optimism we saw from employers last year in forecasting hiring for 2023 was not entirely justified, as inflation and economic uncertainty persisted.

The Past Year

Nearly 30% of employers reported increased employment in 2023, a drop from 32.2% last year, and lower than pre-pandemic levels that approached 37%. More employers maintained the same employment levels, compared to previous years.

Change in Employment Levels over the Last 12 Months

Increased Significantly
- 2023: 13%
- 2021: 7%
- 2019: 10%
- 2013: 6%

Increased Slightly
- 2023: 17%
- 2021: 15%
- 2019: 27%
- 2013: 27%

Remained the Same as Before
- 2023: 54%
- 2021: 47%
- 2019: 48%
- 2013: 54%

Decreased Slightly
- 2023: 11%
- 2021: 17%
- 2019: 13%
- 2013: 11%

Decreased Significantly
- 2023: 5%
- 2021: 14%
- 2019: 2%
- 2013: 2%
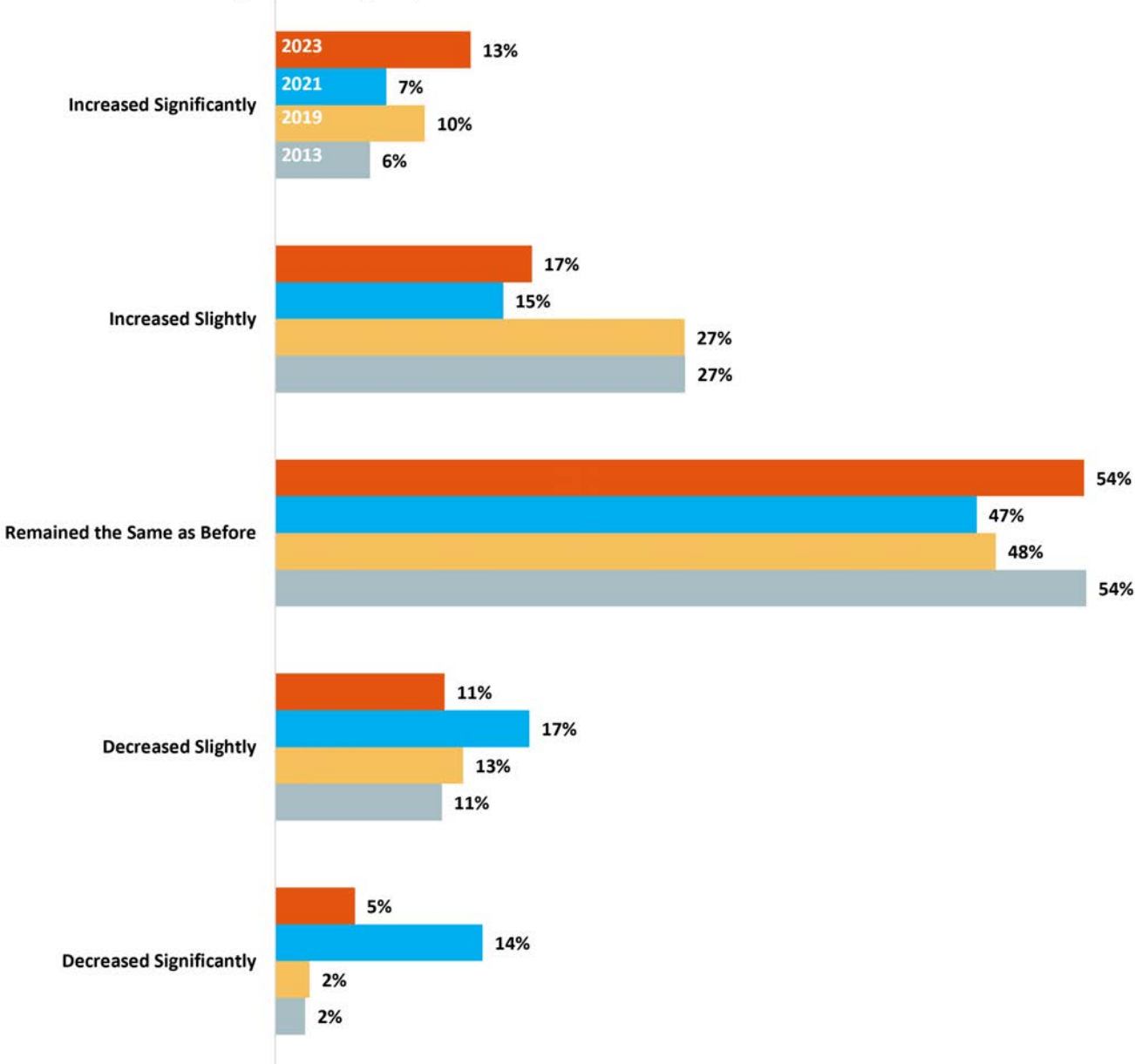
Looking Ahead

Last year, we saw more than 45% of employers reporting that they planned to increase employment levels, a significant drop from 62.5% last year. Nearly 54% of companies indicated that they plan to remain at the same employment levels, a level of inactivity that was consistently reported between the Recession and the start of the pandemic in 2020.

Future Plans to Change Employment Levels in the Next 12 Months

Increase Significantly
- 2023: 13%
- 2021: 21%
- 2019: 6%
- 2013: 7%

Increase Slightly
- 2023: 33%
- 2021: 41%
- 2019: 32%
- 2013: 27%

Remain the Same as Before
- 2023: 50%
- 2021: 35%
- 2019: 57%
- 2013: 53%

Decrease Slightly
- 2023: 3%
- 2021: 2%
- 2019: 3%
- 2013: 11%

Decrease Significantly
- 2023: 1%
- 2021: 1%
- 2019: 2%
- 2013: 2%
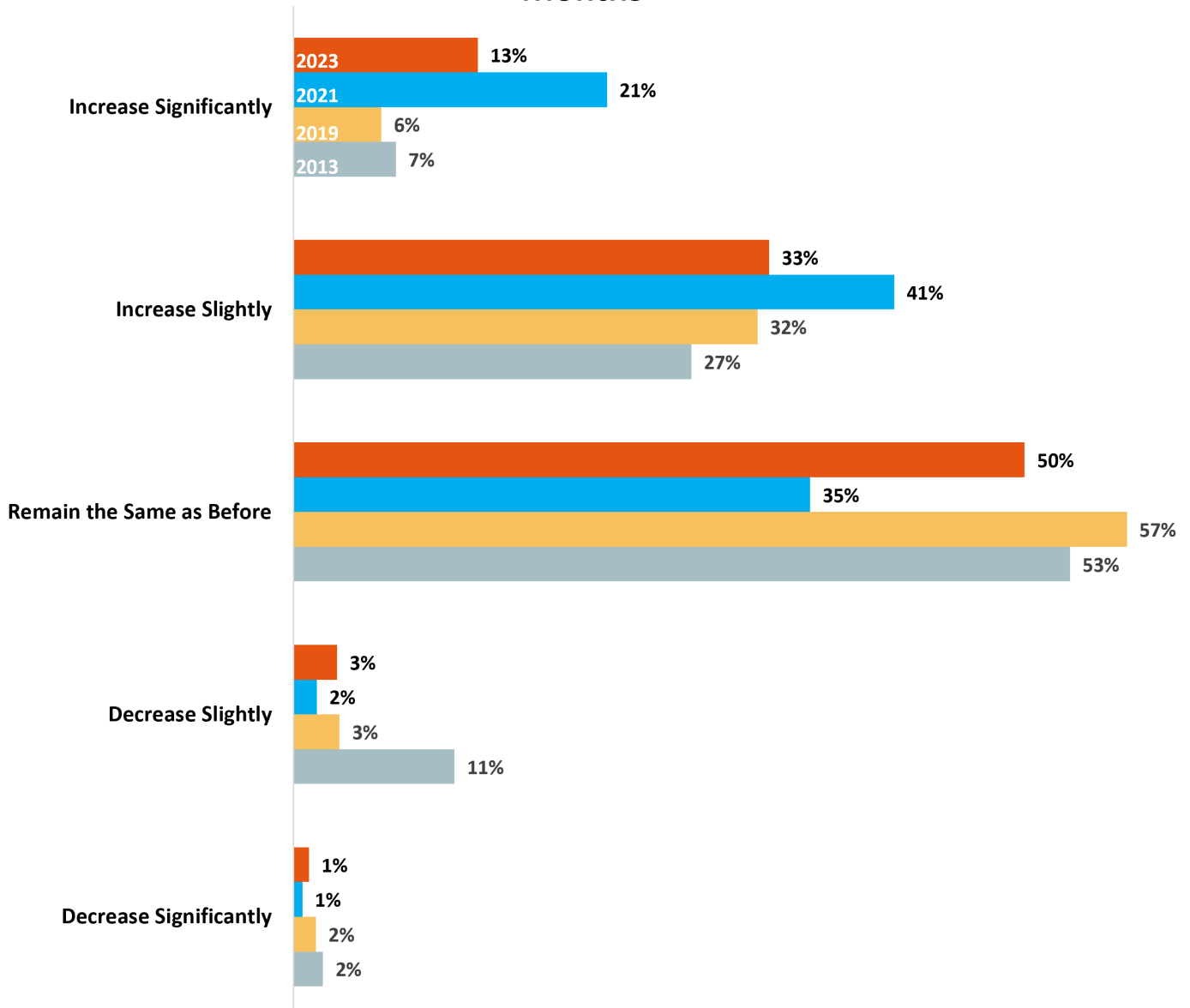
Expanding Employment

The *State of the St. Louis Workforce* survey asked employers about perceived barriers to expanding employment.

Barriers and Skill Gaps

Employers continued to identify shortage of workers with knowledge or skills (46%) as their top barrier to expanding employment. All other responses dropped compared to 2022 answers, though lack of transportation access and lack of childcare access remain the other strong responses. These two factors have changed very little over the last decade and remain challenges, particularly for those companies in the retail and healthcare sectors.

Potential Barriers to Expanding Employment

Shortage of Workers with Knowledge or Skills
- 2023: 46%
- 2021: 58%
- 2019: 46%
- 2013: 38%

Economic Conditions
- 2023: 14%
- 2021: 40%
- 2019: 30%
- 2013: 50%

Government Policies or Regulations
- 2023: 5%
- 2021: 36%
- 2019: 22%
- 2013: 37%

Lack of Transportation Access
- 2023: 15%
- 2021: 19%
- 2019: 18%
- 2013: 13%

Lack of Childcare Access
- 2023: 13%
- 2021: 21%
- 2019: 12%
- 2013: 13%

Lack of information regarding the occupation
- 2023: 9%
- 2021: 13%
- 2019: 10%
- 2013: 12%

Shortage of Available Training Programs
- 2023: 8%
- 2021: 13%
- 2019: 11%
- 2013: 12%

Adding Employees

In 2022, hiring new full-time workers remained the preferred option for employers that wish to add workers, with 67.4% of companies reporting this choice. This has been the top choice for most companies over the last decade.

Hiring part-time workers continues to drop as a preferred method of adding workers, sliding 5% to 47%. All other options for hiring continue to drop compared to 2021 as well, with only Recalling workers from a lay-off list increasing by less than a percent at 4.8%.

Companies that reported decreasing their employment this year also reported higher rates of hiring contract workers (50% higher) and recalling workers from lay-off lists (100% higher).

Methods to Add Workers

Hiring New Full Time Employees
- 2023: 67%
- 2021: 80%
- 2019: 63%
- 2013: 71%

Hiring New Part Time Employees
- 2023: 47%
- 2021: 65%
- 2019: 69%
- 2013: 63%

Using a Temporary Agency
- 2023: 8%
- 2021: 14%
- 2019: 15%
- 2013: 18%

Hiring Contract Workers
- 2023: 7%
- 2021: 13%
- 2019: 14%
- 2013: 19%

Recalling Workers from Lay-off List
- 2023: 5%
- 2021: 10%
- 2019: 13%
- 2013: 16%

Recalling Furloughed Workers
- 2023: 3%
- 2021: 12%
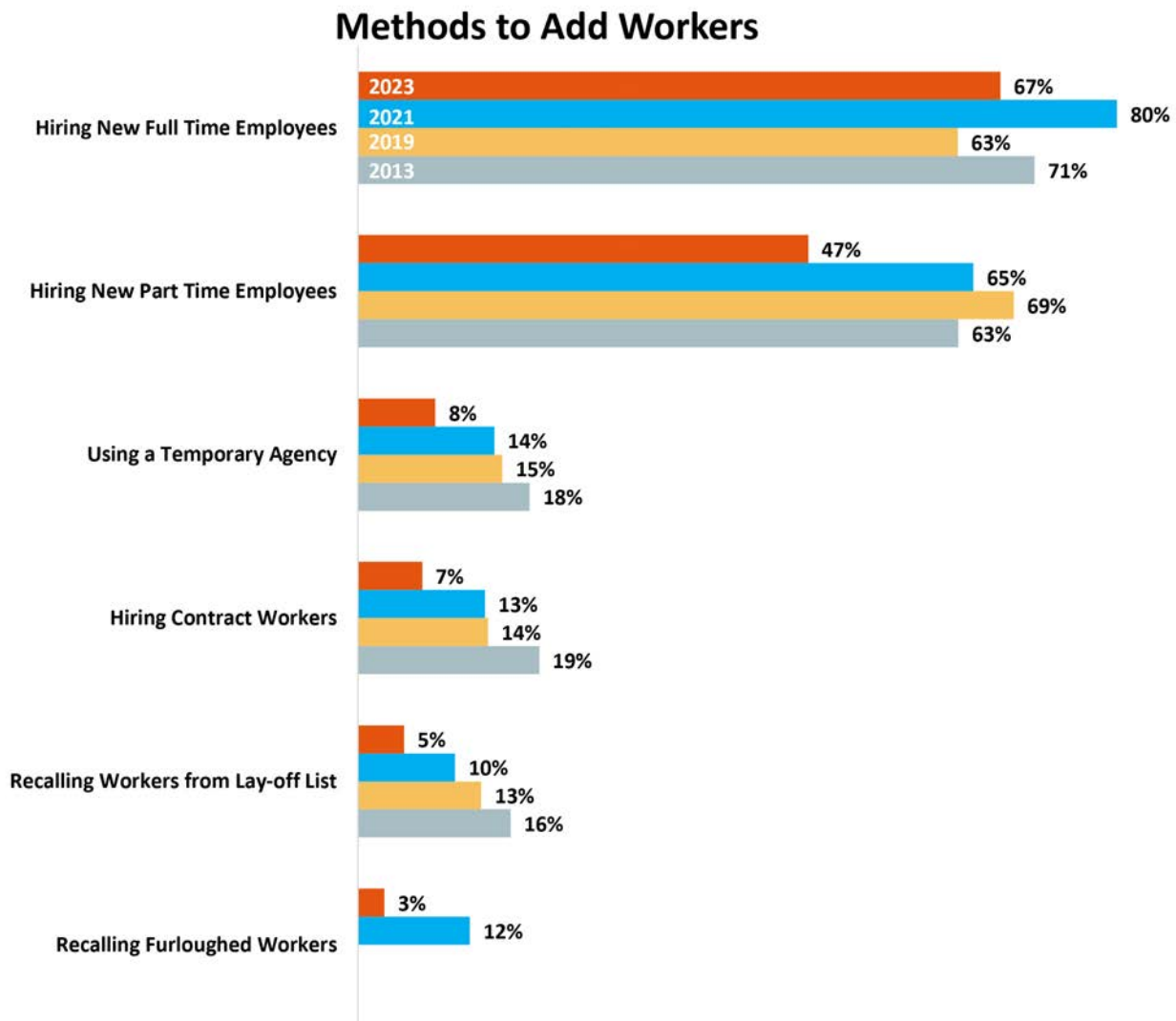
Shortcomings of Job Applicants

The survey queries employers each year about the possible shortcomings they see in applicants for their available jobs. Poor work habits continue to lead the list with 64% of employers noting it. Lack of general business or industry knowledge has jumped to second place, with lack of communication and lack of critical thinking and problem solving rounding out the top four responses, all with around 50% of employers reporting it.

Shortcomings Seen in Job Applicants

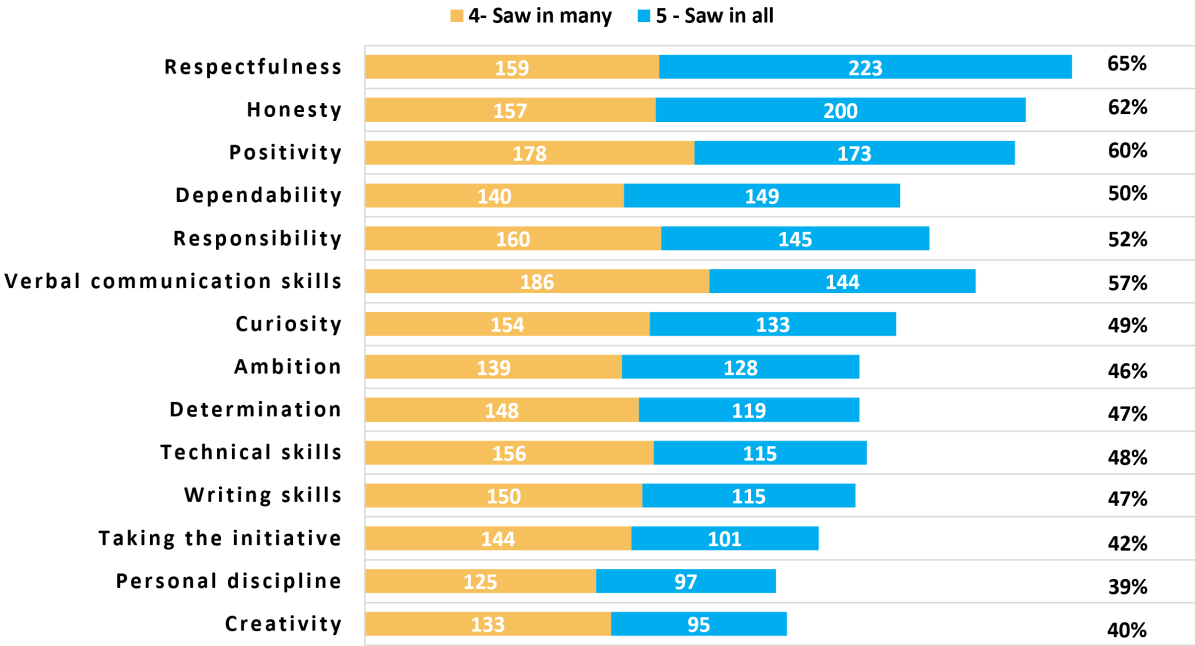| Category	2023	2021	2019	2013
Poor Work Habits (Ethic)	64%	65%	66%	56%
Lack of General Business or Industry Knowledge	52%	57%	44%	50%
Lack of Communication or Interpersonal Skills	51%	53%	56%	59%
Lack of Critical Thinking and Problem Solving	50%	56%	49%	55%
Unwillingness or Inability to Learn	43%	44%	38%	24%
Inability to Think Creatively	42%	52%	39%	44%
Lack of Teamwork or Collaboration	40%	42%	47%	35%
Lack of Technical Skills Specific to the Job	40%	45%	39%	41%
Lack of Writing Skills	30%	36%	43%	44%
Lack of General Computer Skills	29%	30%	26%	26%
Inability to Understand Written & Graphical Information	29%	31%	28%	30%
Lack of Basic Math Skills	29%	33%	34%	29%
Inability to Pass a Drug Test	28%	28%		
Inability to Interact with Different Cultures or Socio-Economic Backgrounds	26%	23%	42%	

With a shortage of workers and job applicants in most industries, a lack of industry knowledge is surfacing higher on the list than it traditionally does. The "soft skills" or "essential skills" that help employees be successful in a job are still observed to be shortcoming in applicants. Employers reported fewer shortcoming in soft skills, including communicatin, problem solving, writing skills and thinking creativity. This may indicate that employers are being less selective as they hire, and less critical of shortcomings in applicants.

Strengths Seen in Job Applicants

In contrast with the shortcomings seen in job applicants, we also surveyed the perceived strengths of job applicants. This is the second year of asking this question and results were very similar to last year's results with respectfulness, honesty and positivity as the top characteristics that were seen in many or all job applicants by employers.
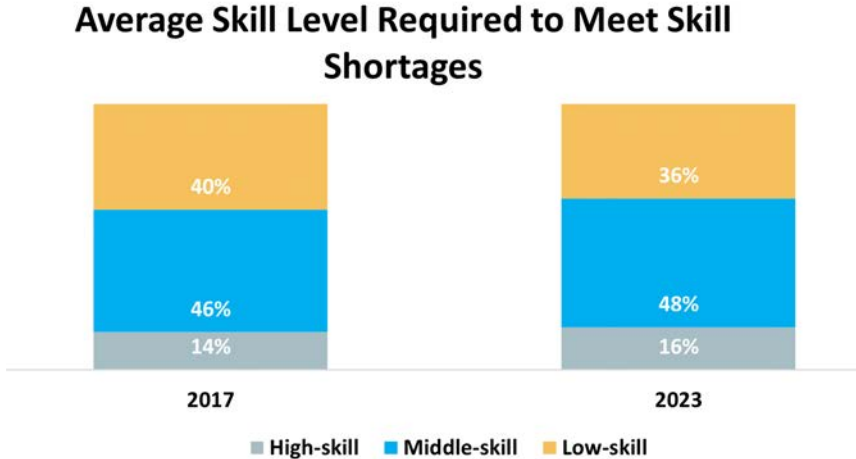
Strengths Seen in More Job Applicants

■ 4- Saw in many ■ 5 - Saw in all

Characteristic	4- Saw in many	5 - Saw in all	%
Respectfulness	159	223	65%
Honesty	157	200	62%
Positivity	178	173	60%
Dependability	140	149	50%
Responsibility	160	145	52%
Verbal communication skills	186	144	57%
Curiosity	154	133	49%
Ambition	139	128	46%
Determination	148	119	47%
Technical skills	156	115	48%
Writing skills	150	115	47%
Taking the initiative	144	101	42%
Personal discipline	125	97	39%
Creativity	133	95	40%

Shortage of Applicants

The low unemployment rates in St. Louis have continued to make it difficult for employers to find candidates, though that appears to be easing. The number of businesses in the survey reporting a shortage of skilled applicants has dropped from 63% in 2022 to 46% in 2023.
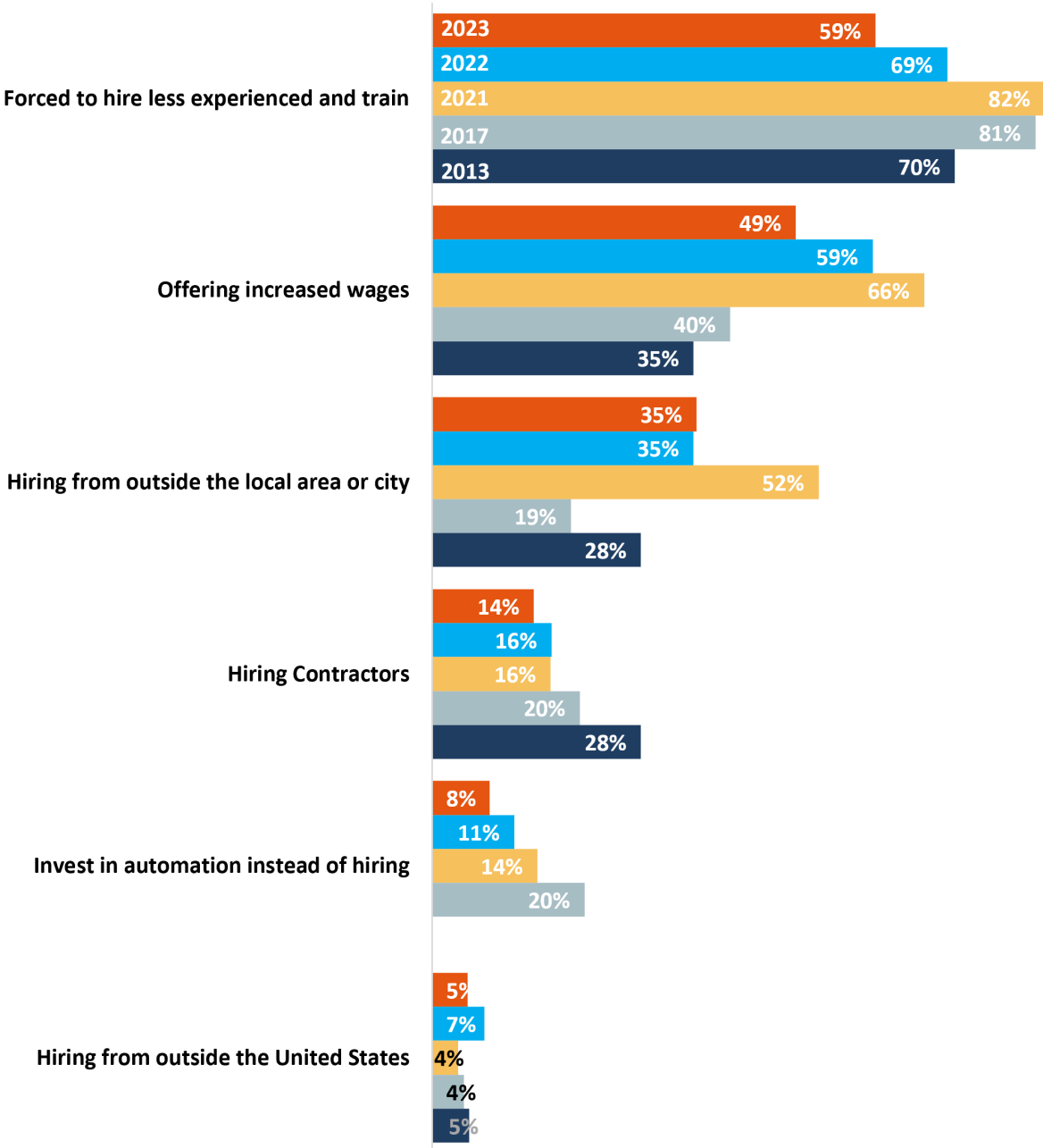
The number of available job seekers is not in perfect alignment with the skill needs in the region, with some industries experiencing a larger gap in skilled workers. For instance, with thousands of job postings, the IT industry could double the size of its workforce and still have gaps. The healthcare sector is also struggling with significant hiring needs following COVID, in an industry where training takes years to prepare the next round of workers.

Average Skill Level Required to Meet Skill Shortages

	2017	2023
Low-skill	40%	36%
Middle-skill	46%	48%
High-skill	14%	16%

■ High-skill ■ Middle-skill ■ Low-skill

During COVID, we saw a shift to needing more high-skill and low-skill workers to meet skill shortages. This year's results indicate a return to pre-COVID levels, with high-skills needed by 16% of employers (down from 27% in 2022), middle-skills needed by 48% of employers (up from 38%), and low-skills needed by 38% of employers (remaining the same as 2022 levels).

The survey asked what measures companies were taking in order to meet the skill shortages. Fifty-nine percent of employers reported they hire less experienced workers and train them, down from 69% last year. The second most common response continues to be offering in-creased wages at 49% of companies, also down 10% from last year's 59%. A third of companies hire from outside the local area. All other forms of hiring follow at a distance and continue to shrink as options that employers choose.

Measures Taken to Meet the Skill Shortages of Applicants

Forced to hire less experienced and train
- 2023: 59%
- 2022: 69%
- 2021: 82%
- 2017: 81%
- 2013: 70%

Offering increased wages
- 49%
- 59%
- 66%
- 40%
- 35%

Hiring from outside the local area or city
- 35%
- 35%
- 52%
- 19%
- 28%

Hiring Contractors
- 14%
- 16%
- 16%
- 20%
- 28%

Invest in automation instead of hiring
- 8%
- 11%
- 14%
- 20%

Hiring from outside the United States
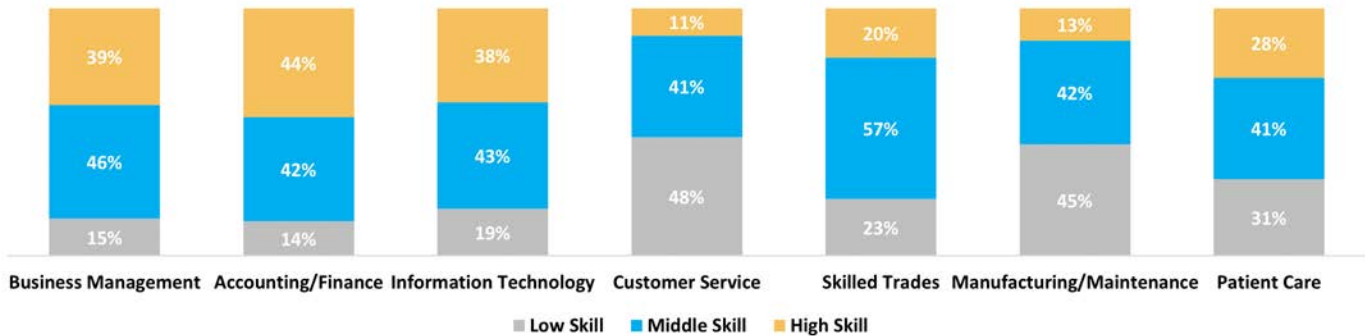- 5%
- 7%
- 4%
- 4%
- 5%

Skills Shortages in Functional Areas

Since 2017, the survey has asked employers about their workforce in seven key functional business areas: accounting / finance, business management, customer service, information technology, manufacturing/maintenance, patient care, and skilled trades. We ask the surveyed companies if they employ workers in these functional areas and whether they are having difficulty finding skilled applicants for open positions. Every functional area indicated a decrease in the need for job applicants compared to a year ago. Skilled trades continues to have the highest number of firms reporting applicant shortages at 63%, down from 68% in 2022. Patient Care has the second highest applicant shortage, with 51% of firms in need, down from 63% in 2022.

Employers were given a choice of high-skill, middle-skill, or low-skill to gauge the skill level required to meet the shortages in each of the seven functional areas.

Applicant Skill Levels Sought

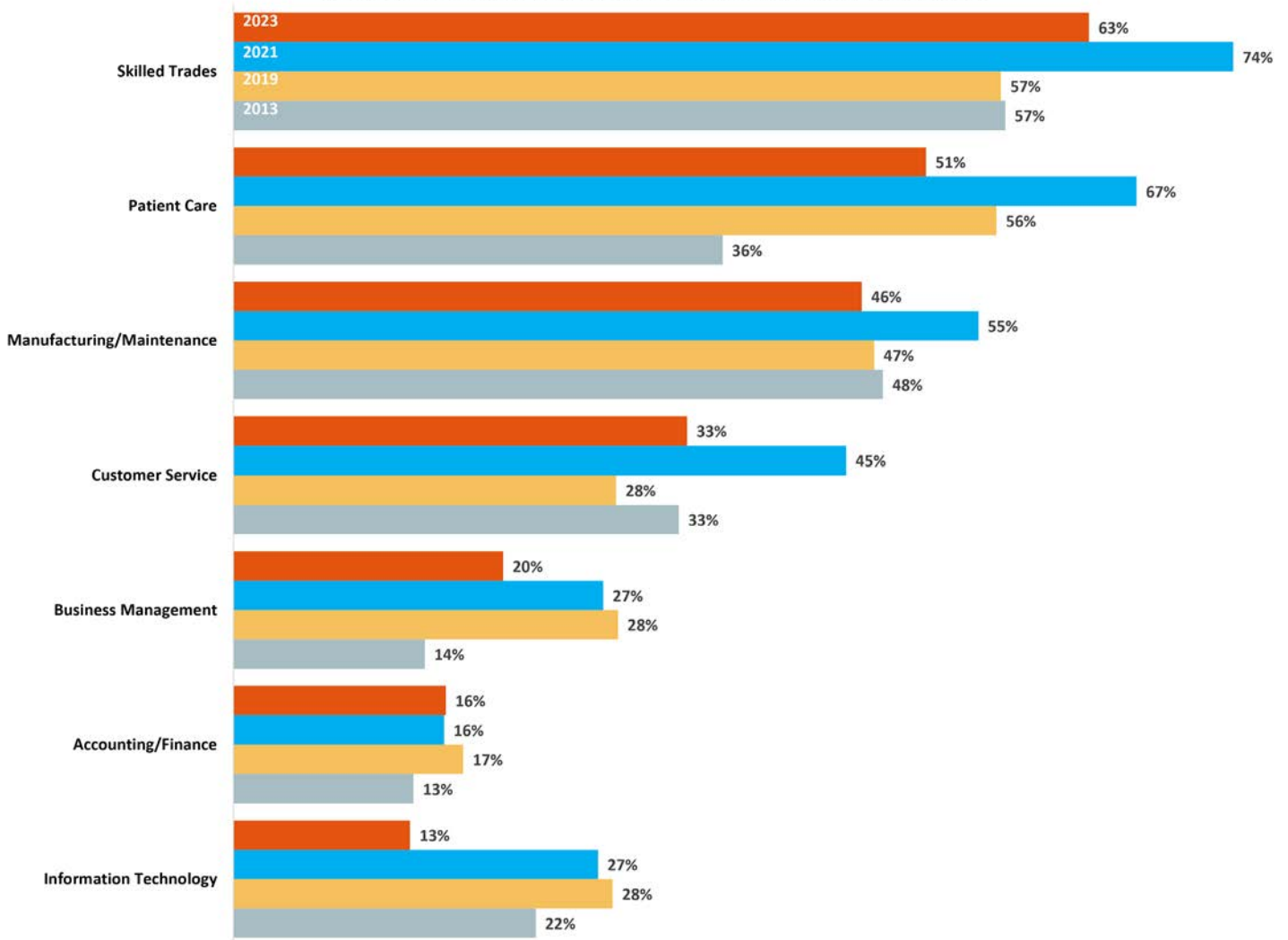|	Business Management	Accounting/Finance	Information Technology	Customer Service	Skilled Trades	Manufacturing/Maintenance	Patient Care
High Skill	39%	44%	38%	11%	20%	13%	28%
Middle Skill	46%	42%	43%	41%	57%	42%	41%
Low Skill	15%	14%	19%	48%	23%	45%	31%

Legend: Low Skill · Middle Skill · High Skill

" We have to plan, implement and evaluate workforce development efforts to draw from a more eclectic and inclusive population."

Chauncey Nelson
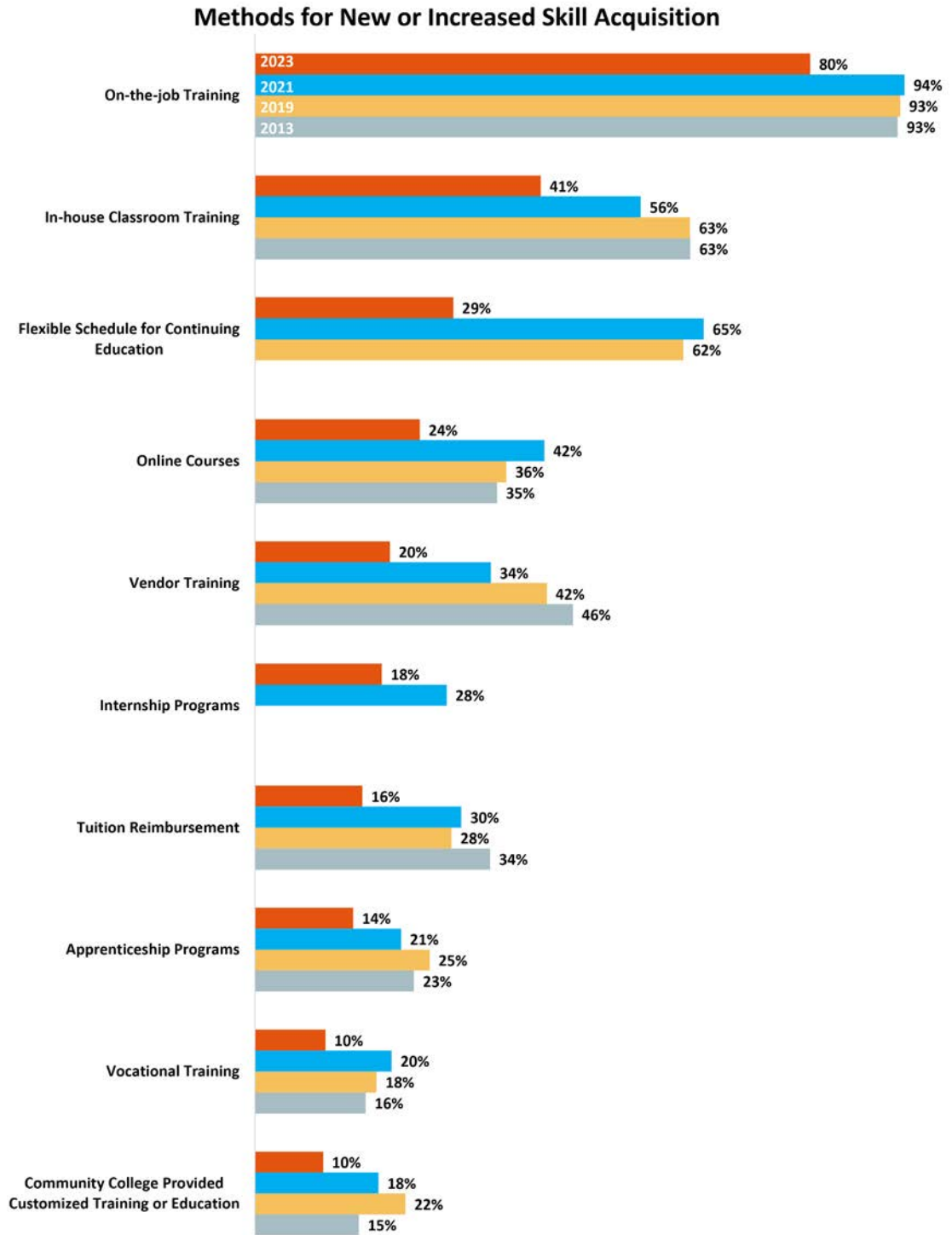Gateway South Innovation District

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All functional areas, except Patient Care and Manufacturing/Maintenance, saw an increase in the need for middle-skill applicants, with increases ranging from 2%-13%. High-skill needs were the same or lower, and the need for low-skill applicants decreased as well. Manufacturing/Maintenance skill level needs remained nearly the same as 2022. Patient Care skill needs were nearly the opposite of the other functional areas, with a 6% increase in the need for high-skill applicants, a 4% increase for low-skill applicants, and a 10% drop in the need for middle-skill applicants.

Firms Reporting Applicant Shortages in Functional Areas

Skilled Trades
- 2023: 63%
- 2021: 74%
- 2019: 57%
- 2013: 57%

Patient Care
- 2023: 51%
- 2021: 67%
- 2019: 56%
- 2013: 36%

Manufacturing/Maintenance
- 2023: 46%
- 2021: 55%
- 2019: 47%
- 2013: 48%

Customer Service
- 2023: 33%
- 2021: 45%
- 2019: 28%
- 2013: 33%

Business Management
- 2023: 20%
- 2021: 27%
- 2019: 28%
- 2013: 14%

Accounting/Finance
- 2023: 16%
- 2021: 16%
- 2019: 17%
- 2013: 13%

Information Technology
- 2023: 13%
- 2021: 27%
- 2019: 28%
- 2013: 22%

Methods of Skill Acquisition

The companies in this year's survey reported less usage of typical training options in every category. Training and employee education have remained strong over time, with little variation in company responses since the Recession. The drop in rates could either indicate that companies are narrowing their training options and focusing on formats that work for their needs, or it could mean that companies are simply putting people to work with less training.

Methods for New or Increased Skill Acquisition

On-the-job Training
- 2023: 80%
- 2021: 94%
- 2019: 93%
- 2013: 93%

In-house Classroom Training
- 2023: 41%
- 2021: 56%
- 2019: 63%
- 2013: 63%

Flexible Schedule for Continuing Education
- 2023: 29%
- 2021: 65%
- 2019: 62%

Online Courses
- 2023: 24%
- 2021: 42%
- 2019: 36%
- 2013: 35%

Vendor Training
- 2023: 20%
- 2021: 34%
- 2019: 42%
- 2013: 46%

Internship Programs
- 2023: 18%
- 2021: 28%

Tuition Reimbursement
- 2023: 16%
- 2021: 30%
- 2019: 28%
- 2013: 34%

Apprenticeship Programs
- 2023: 14%
- 2021: 21%
- 2019: 25%
- 2013: 23%

Vocational Training
- 2023: 10%
- 2021: 20%
- 2019: 18%
- 2013: 16%

Community College Provided Customized Training or Education
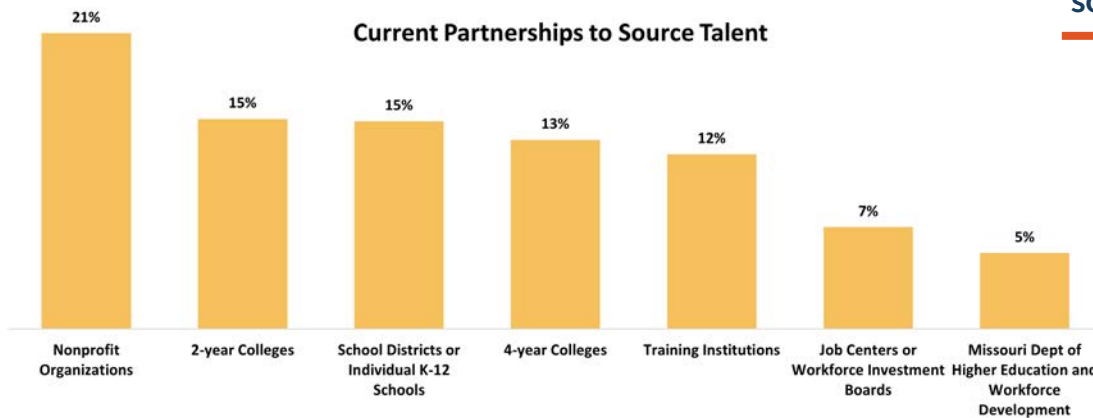- 2023: 10%
- 2021: 18%
- 2019: 22%
- 2013: 15%

On-the-job training remained the most common method to assist workers in obtaining new or increased skills, with 80% of employers selecting it, a drop from 86% last year. In-house classroom training is the second most popular option with 41% of companies utilizing this approach, down from 53% in 2022. The next most popular options – Flexible Schedule for Continuing Education, Online Courses, and Vendor Training – were all down 7% - 13% from 2022.

Training and reskilling of workers will continue to be a key facet of economic growth, as employers determine how to best retain and support their workers, and for workers to acquire new skills or upgrade their skills to remain employable and explore new options.

Sourcing Talent

The difficult hiring market of the last few years is starting to show in the way employers seek new workers. This year's responses to "Do you currently have partnerships with any of the following organizations to help you source talent?" were significantly different in that 4-year colleges dropped from being a top choice to a fourth most-used option, dropping from 26% to 13%. Two-year colleges also dropped from 26% to 15%, maintaining their second place position in the survey. Partnerships with nonprofit organizations topped the list with 21% of employers reporting, up 2% from last year.

> **K-12 schools rose in the rankings this year, being selected more frequently then 4-year colleges as partnerships to source talent.**

Current Partnerships to Source Talent

Category	Percentage
Nonprofit Organizations	21%
2-year Colleges	15%
School Districts or Individual K-12 Schools	15%
4-year Colleges	13%
Training Institutions	12%
Job Centers or Workforce Investment Boards	7%
Missouri Dept of Higher Education and Workforce Development	5%

School districts or K-12 schools rose in the rankings this year, being selected more frequently than four-year colleges. This is an attractive option for many companies that are focusing on promoting their industry to younger students before they have committed to a specific career, particularly in skilled trades, manufacturing and tech. Skilled trades and manufacturing are often misunderstood with decades-old stereotypes and a lack of understanding of the family-supporting salaries and career paths available.

Dropping even lower on the list of talent sources are the job centers and workforce investment boards and Missouri Department of Higher Education and Workforce Development. These entities are funded by state and local governments, providing employment assistance including job matching, business counseling, providing job assessments to candidates, and more. Missouri employers can find their local job center at jobs.mo.gov.
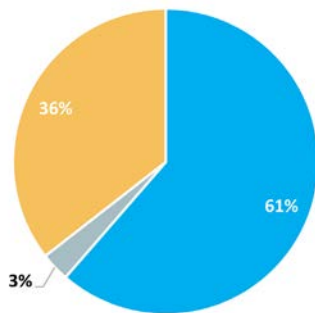
Experience and Education

Experience and education can be potential barriers for entry into the workforce. We ask employers each year to define their positions that require a specific level of experience and education. In 2020, at the start of the pandemic, employers had fewer positions available for workers with no experience or with less education or training. The needs for experience and/or education have eased since then, but employers still prefer a few years of experience.
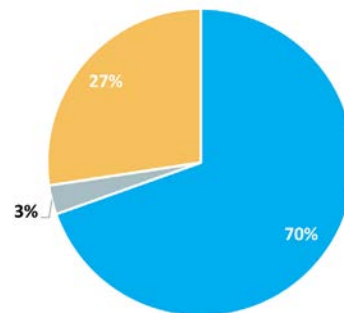
Experience Requirements

Employers often do not have positions for applicants with no experience (61%), but 36% of employers say that 50% or more of their jobs require no experience, up from 27% last year. Over a quarter of employers say that most of their jobs (50-100% of jobs) require some experience or 1-3 years of experience.

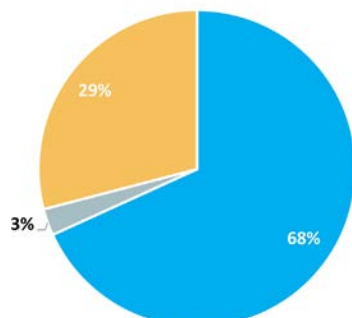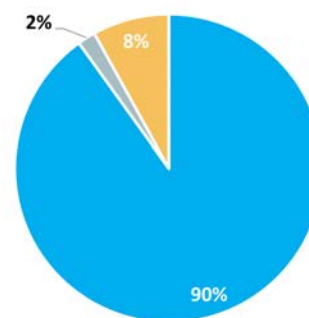## Percentage of Positions Available for the Indicated Level of Experience

No Experience
36%
3%
61%

Some experience, but less than 1 year
27%
3%
70%

A minimum of 1 to 3 years of experience
29%
3%
68%

A minimum of 4 or more years of experience
2%
8%
90%

■ No Jobs   ■ 1 to 49%   ■ 50% or more

Education Requirements

While more companies are requiring experience for most of their jobs, the requirements for education have shifted significantly in this year's survey.

These levels are defined as high-skill (requiring a four-year degree or higher), middle-skill (requiring training or education beyond a high school diploma but less than a four-year degree), or low-skill (requiring a high school diploma or less).

The number of employers with positions for high-skill employees has trended up since 2017, leveling out in 2022 at 54%. This year, that dropped to only 18% of employers seeking high-skill employees, a dramatic 36% drop. Employers have often used a four-year degree as a screening criteria or as an indicator of perseverance, though there is a national trend to remove degrees from job postings to allow for a larger pool of candidates.
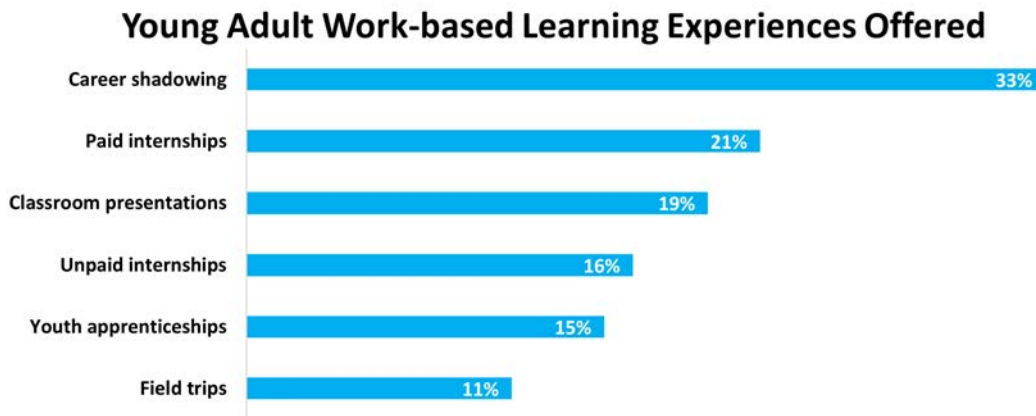
The number of employers with middle-skill education positions dropped by 20%, from 60% in 2022 to 40% in 2023. Employers even reported significantly fewer low-skill education positions, falling from 64% in 2022 to 50% of employers in 2023. This overall trend could be a combination of fewer companies hiring currently, and more companies relying on experience criteria rather than education requirements.

Employers with Jobs at Specified Education Levels

	Low Skill Education	Middle Skill Education	High Skill Education
2019	85%	64%	45%
2022	64%	60%	54%
2023	50%	40%	18%

■ 2019 ■ 2022 ■ 2023
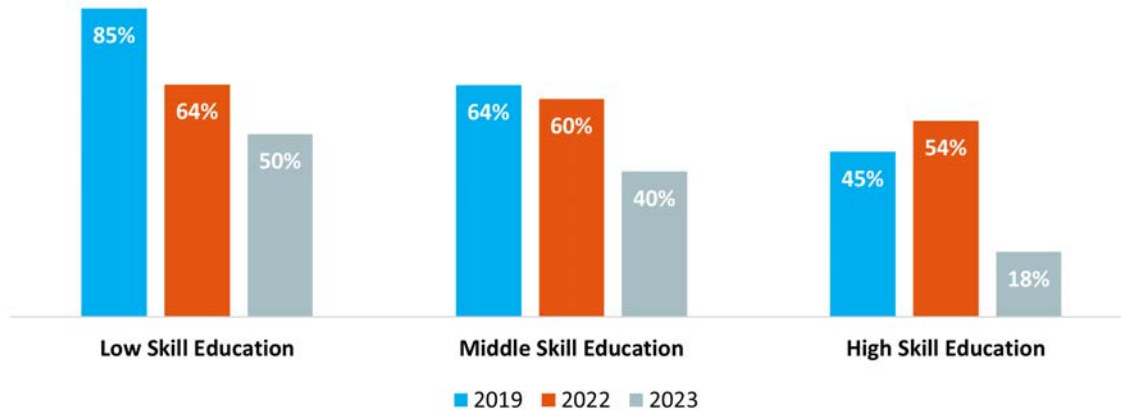
Experience Opportunities for Young Adults

As many employers continue to broaden their recruiting efforts toward younger candidates, we asked a survey question for the second year about offering work-based learning experiences for students and young adults. More employers participated with career shadowing and youth apprenticeships, with slight increases of 3-4%. All other options had fewer employers, dropping by 3-6%, including both paid and unpaid internships. These valuable experiences can be challenging for employers to offer when they are understaffed, which many businesses are.

Young Adult Work-based Learning Experiences Offered

Experience	Percent
Career shadowing	33%
Paid internships	21%
Classroom presentations	19%
Unpaid internships	16%
Youth apprenticeships	15%
Field trips	11%

Employment Barriers

The survey examines barriers to employment, including background checks and criminal convictions. These screening tools may be designed to protect a company, though they are also eliminating job candidates who could be qualified and may have been convicted of lesser, non-violent offenses. This perpetuates a cycle of joblessness, under employment and poverty.
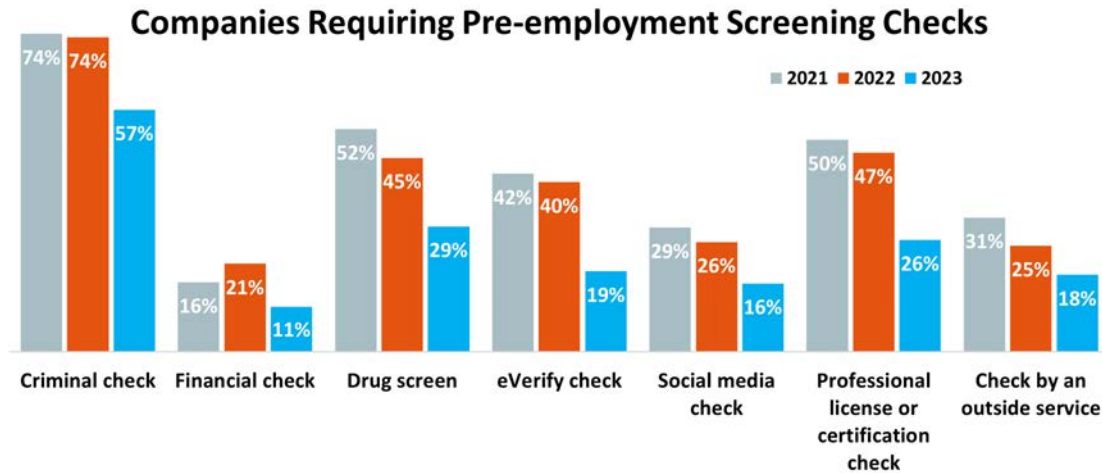
Currently, there are over 10,000 adults from the St. Louis MSA that are incarcerated. A felony conviction follows that individual for the rest of their life, permanently impacting options for employment, housing, and more. If 10,000 adults are incarcerated in our region today, the cumulative number of convicted felons is much higher and impacts our workforce and communities when they are excluded from opportunities for living wage jobs.

> " We need to work together to remove obstacles for each and every interested worker. This will be critical to building a strong and enduring regional workforce."
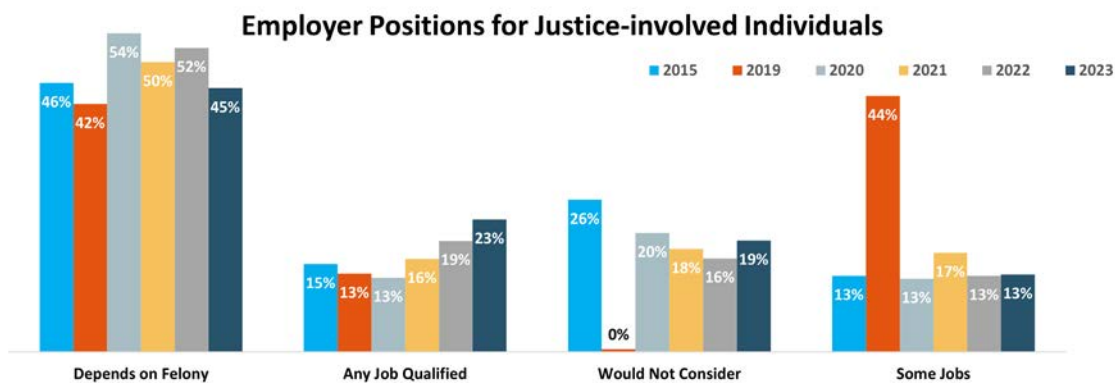>
> Kory Mathews
> AMIC STL

Pre-employment Screening Checks

While pre-employment screening checks tend to be applied to either all or no job candidates for a company, the overall use of these screening tools has been consistently dropping since 2020. Criminal checks, drug screens, eVerify checks, and professional license or certification checks each dropped by 16% or more. Financial checks and social media checks each dropped by 10%. Time will tell if these changes are permanent due to a change in hiring practices, or if it is primarily driven by the tight labor market and fewer applicants for jobs.

Companies Requiring Pre-employment Screening Checks

Legend: 2021, 2022, 2023

Category	2021	2022	2023
Criminal check	74%	74%	57%
Financial check	16%	21%	11%
Drug screen	52%	45%	29%
eVerify check	42%	40%	19%
Social media check	29%	26%	16%
Professional license or certification check	50%	47%	26%
Check by an outside service	31%	25%	18%

Justice-Involved Individuals

Nineteen percent of respondents stated that they would not consider hiring an applicant with a felony conviction who had completed their sentence and/or probation, up slightly from 16% last year.

Employer Positions for Justice-involved Individuals

Legend: 2015, 2019, 2020, 2021, 2022, 2023

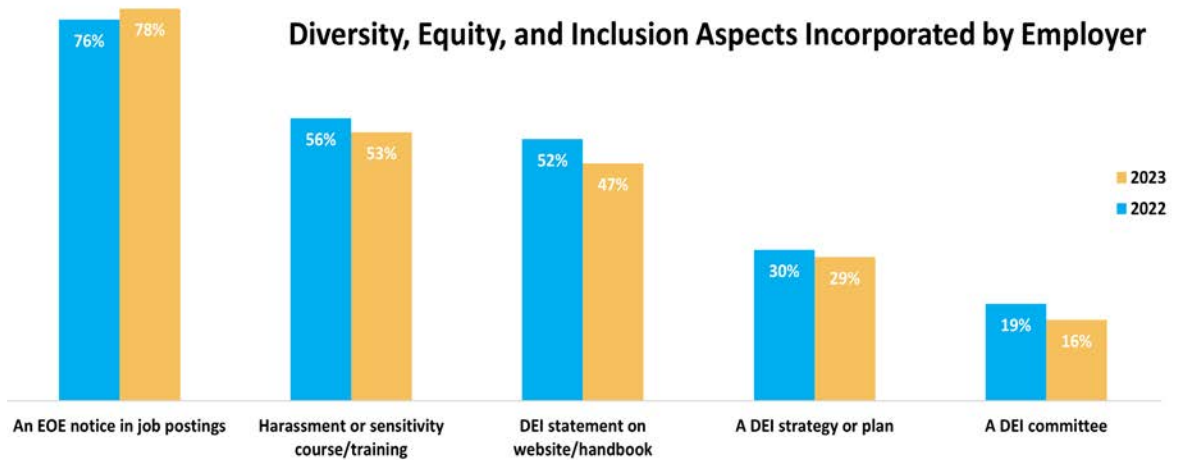| Category	2015	2019	2020	2021	2022	2023
Depends on Felony	46%	42%	54%	50%	52%	45%
Any Job Qualified	15%	13%	13%	16%	19%	23%
Would Not Consider	26%	0%	20%	18%	16%	19%
Some Jobs	13%	44%	13%	17%	13%	13%

For 2023, 45% of the companies responded that it would depend on the felony, down from 52% last year. Nearly a quarter of the companies (23%) stated that they would hire an applicant that had been convicted of a felony offense for any job for which the candidate was qualified.

Diversity, Equity and Inclusion Initiatives

Diversity, Equity and Inclusion (DEI) initiatives are programs and policies that aim to promote representation and encourage participation of employees from all walks of life.

The survey started to include questions about DEI efforts in 2022. For 2023, there was an increase in businesses using an Equal Opportunity Employer (EOE) notice in their job positing, increase from 76% to 78%. All other categories of DEI training, strategies and committees were about the same response rate this year, dipping slightly.

Diversity, Equity, and Inclusion Aspects Incorporated by Employer

	2022	2023
An EOE notice in job postings	76%	78%
Harassment or sensitivity course/training	56%	53%
DEI statement on website/handbook	52%	47%
A DEI strategy or plan	30%	29%
A DEI committee	19%	16%

" **When you talk about the quality of a job, what everybody needs to put into consideration, is first of all the job stability.**"

Worker Voices
Federal Reserve Bank

Remote Work

Perhaps no topic related to employees has been more at the forefront of company decisions since the start of the COVID-19 pandemic than remote work. Prior to the pandemic, it is estimated that 6% of employees worked remotely.
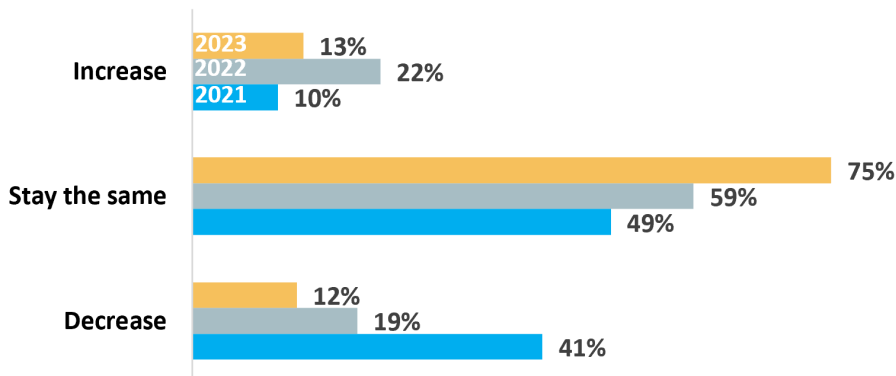
With the start of the pandemic in 2020, 61% of companies surveyed reported employees working remotely. Since then, that number has settled in to about one-quarter of companies with employees working offsite, or 23% for 2023.

Most employers seem to have settled into a comfortable spot for remote work, with 72% of companies responding that they expect their remote work policy to stay the same over the next year. Equal number of businesses, 12%, expect to increase or decrease the number of remote workers over the next 12 months.

Employees Working Remotely

Year	%
2023	23%
2022	26%
2021	23%
2020	61%
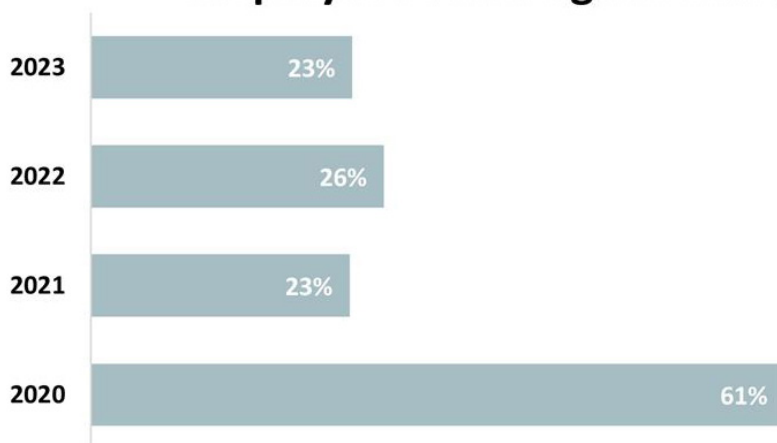
Expected change in number of remote workers over the next 12 months

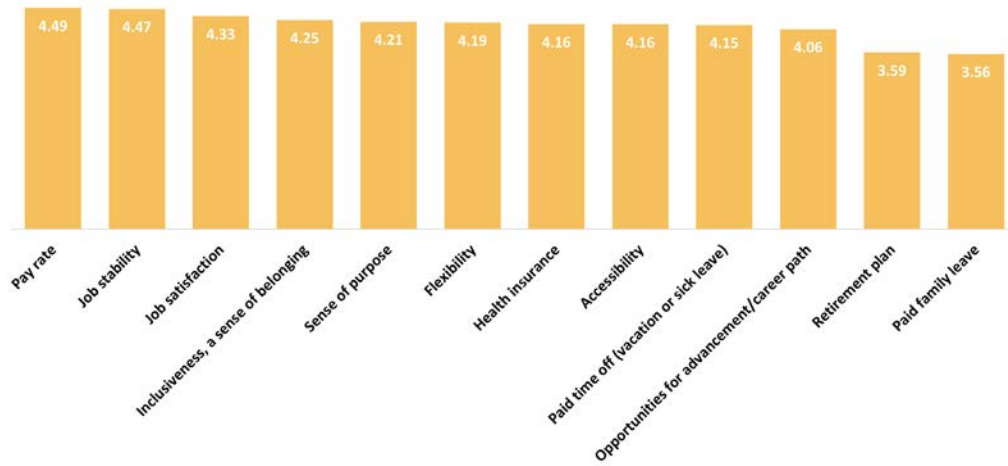|	2023	2022	2021
Increase	13%	22%	10%
Stay the same	75%	59%	49%
Decrease	12%	19%	41%

What Makes a "Good Job?"

Another recently added question strives to understand the characteristics of a "good job" by asking employers to rank the importance of different benefits and facets of a job on a scale of 1 to 5, where 1 was "not at all important" and 5 was "very important".

Compared to last year's survey, the top three characteristics returned, with job stability and job satisfaction swapping spots as the second and third most popular options. Pay rate stays in the top spot. All other characteristics stayed in the same ratings spot, with some minor variations in average importance scores. The two characteristics that had a significant change were inclusiveness, a sense of belonging and health insurance. These two swapped the fourth and seventh spots out of the 12 characteristics, with Inclusiveness moving up to the fourth most important characteristic.

Characteristics of a "Good Job"

Characteristic	Score
Pay rate	4.49
Job stability	4.47
Job satisfaction	4.33
Inclusiveness, a sense of belonging	4.25
Sense of purpose	4.21
Flexibility	4.19
Health insurance	4.16
Accessibility	4.16
Paid time off (vacation or sick leave)	4.15
Opportunities for advancement/career path	4.06
Retirement plan	3.59
Paid family leave	3.56

Spotlight on Startups

Entrepreneurs have been part of our community since the beginning. Over the years, the willingness to take a risk and start a new business has resulted in what we see today - 15 Fortune 1000 companies and eight of the Forbes' largest private companies in America - and a vibrant mix of industries across our region. The largest St. Louis-based companies each started with a first sale and their first employee, in some cases over 100 years ago. That same spirit continues to be needed today, as job creation must be a key part of our economic growth.

New and young firms are the primary source of job creation in both urban and rural communities in the U.S., according to the Ewing Marion Kauffman Foundation. Large corporations may grow and add jobs, but they are more skilled at creating efficiencies in their business with the goal of producing more with fewer resources. Startups are truly the source of new job creation, and both St. Louis and Missouri continue to rely on startups as a large portion of their job growth each year.
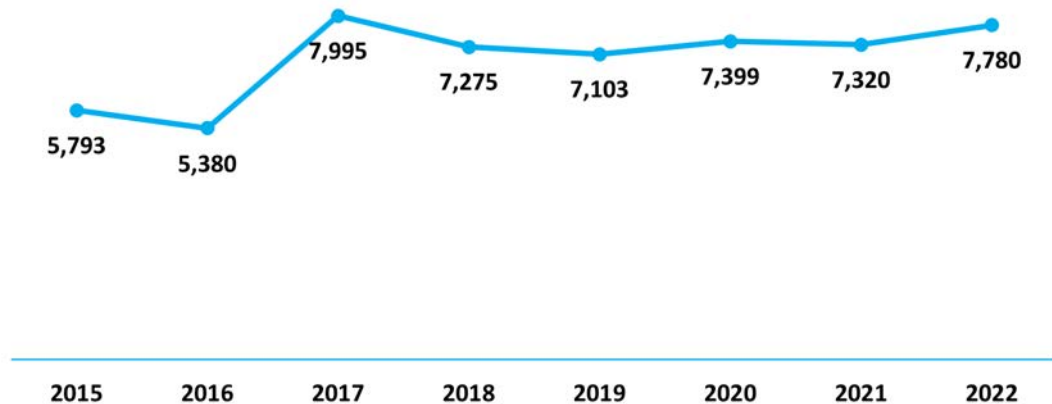
2022 was a challenging year for startups. Supply chain issues lingered. Interest rates increased several times, changing the dynamics of borrowing money and funding debt for both the startups and their customers. Venture capital investments dropped from the previous year. Economic uncertainty has continued, impacting sectors and their startups very differently.

New and young firms are the primary source of job creation.

Startup Creation

Startups, however, do not stop just because economic conditions aren't ideal. For the St. Louis MSA, 7,780 startups hired their first employees in 2022. This is an increase of 462 startups over 2021, an increase of 6%.

St. Louis Region First-time Startups by Year

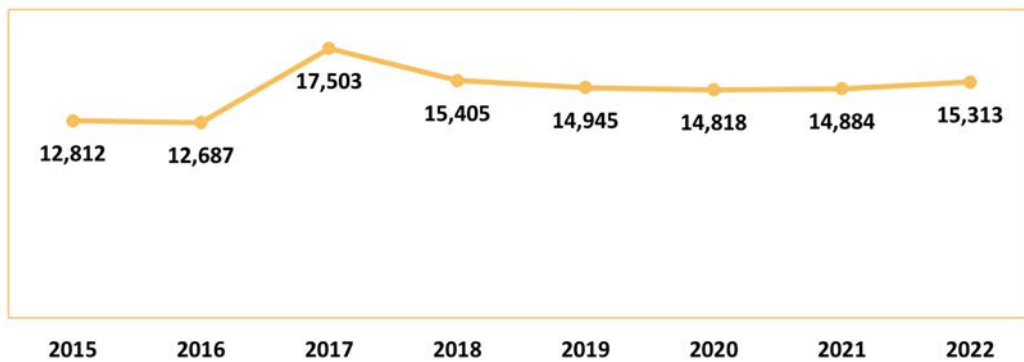| Year	Startups
2015	5,793
2016	5,380
2017	7,995
2018	7,275
2019	7,103
2020	7,399
2021	7,320
2022	7,780

Job Creation by First-Time Employers

The 7,780 startups were first-time employers for our region, and those startups created 15,313 new jobs in 2022. This regional contribution is part of the 18,137 startups with 40,394 new jobs created in Missouri last year. St. Louis anchors Missouri with 44% of the new jobs created across the state in 2022, on pace with the St. Louis development area which comprises about 40% of the state's economy.

New job creation by first-year startups has been steady since 2018, with an eight-year average of 14,795 jobs. St. Louis startups creating, on average, 14,795 brand new jobs every year is worth repeating. 2022 was the third highest year for job creation by startups since 2015, and the second highest for the number of startups created. From 2015 to 2022, first-year startups in the St. Louis region created a total of 118,367 new jobs.

St. Louis Region Jobs Created by First-time Startups by Year

2015	2016	2017	2018	2019	2020	2021	2022
12,812	12,687	17,503	15,405	14,945	14,818	14,884	15,313

As positive as job creation is, startups are high-risk and failure is part of the equation. According to the U.S. Bureau of Labor Statistics, about 20% of small businesses fail within their first year. In Missouri, 55% of first-time businesses are no longer employing anyone four years later. The companies that survive, however, continue to grow and create more jobs, making up for the jobs lost by other firms closing.

**First-year startups created 15,313 new jobs in St. Louis in 2022.**

St. Louis startups founded in 2018 hired 15,453 employees that year. Since then, the number of employees at those firms has been as high as 16,272 in 2019, and as low as 13,838 in 2021. This takes into account the job losses of firms closing, as well as the increased hiring of the remaining firms that continue to grow. Given the growth trends for startups, we would expect the remaining 2018 startups to continue to increase their hiring going forward.

Startups by Geography

This report identifies a first-year startup as a firm hiring its first employee. Using this definition, St. Louis created 7,782 startups in 2022, up slightly from the 7,320 startups created in 2021. Across the state, most of the startups cluster in the state's population centers including Kansas City, Columbia, Springfield, Joplin, Cape Girardeau and St. Louis, though there are first-time employers located in every county across the state, as depicted in this heat map from MOSourceLink's Show Me Jobs report.

St. Louis County has the highest density of startups of any county in the state, as noted by the deep orange color.

Density of Startups by Geography
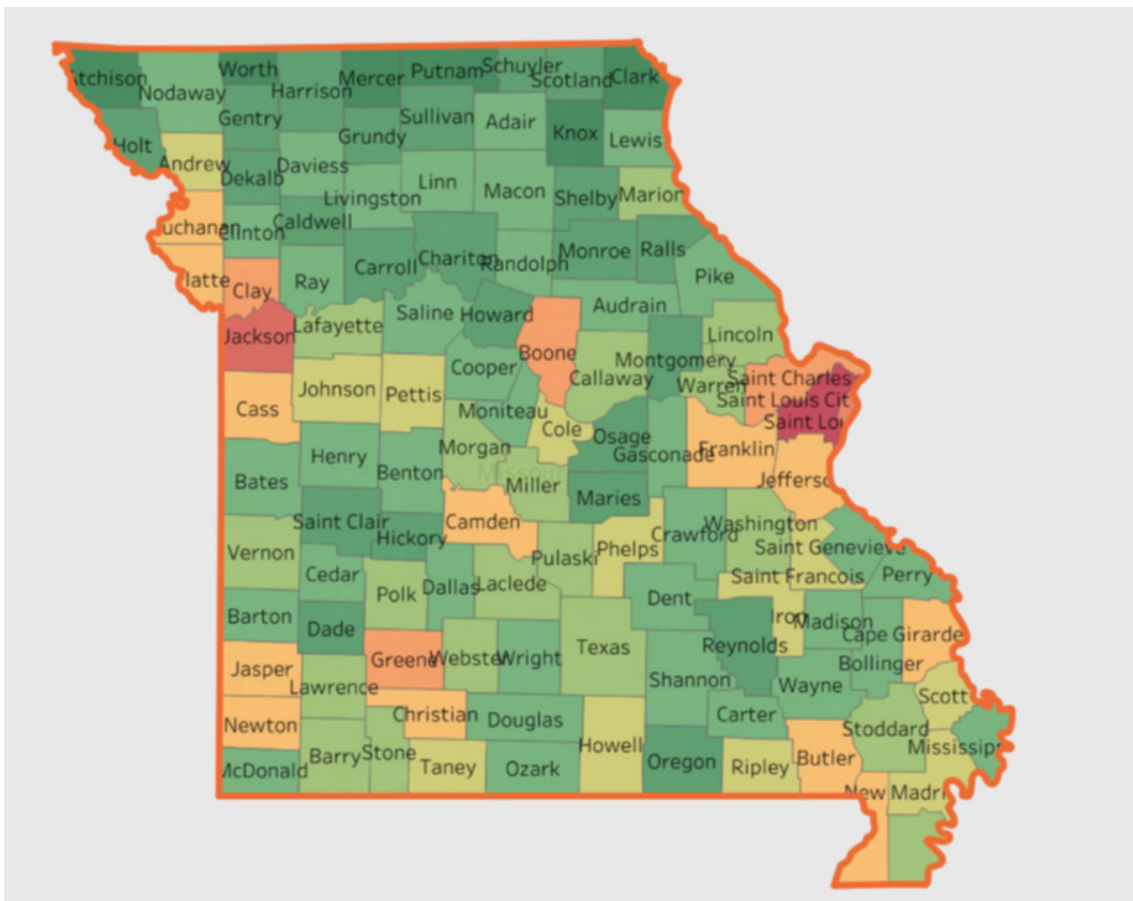
Startups by Industry Sector

St. Louis startups are focused in the same industries as overall employment for the region. Health care and social assistance is the largest employer in the St. Louis MSA, and is also the largest two-digit NAICS code for both startups and job creation. In the last eight years, 32,528 startups were launched in this industry sector alone, accounting for 58% of all startups over this period, and a third of the jobs created by first-year startups since 2015.

The next largest concentration occurred in the professional, scientific and technical services NAICS code with 4,163 startups born since 2015, or 7.4% of all new startups during that time. This sector is also responsible for 7.4% of new jobs created, with 8,758 jobs.

Other key industries for startup creation include retail trade, construction, and accommodation and food service, though these significantly trail the previous two categories. These industries mirror the top sectors for startups across Missouri.
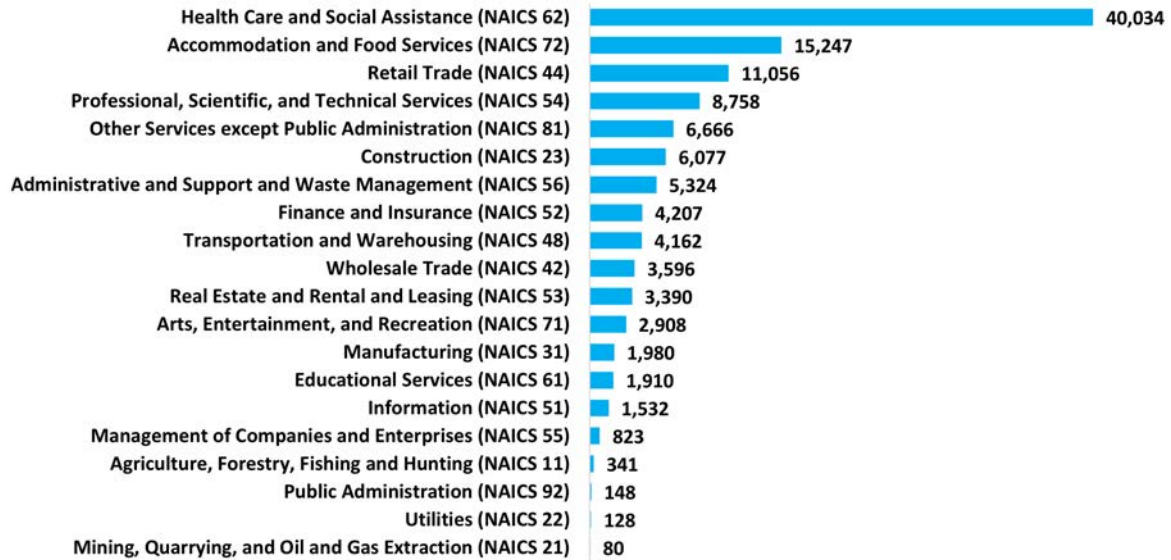
St. Louis Region Startups by Industry (2015-2022)

Industry	Startups
Health Care and Social Assistance (NAICS 62)	32,528
Professional, Scientific, and Technical Services (NAICS 54)	4,163
Other Services except Public Administration (NAICS 81)	3,223
Retail Trade (NAICS 44)	2,473
Construction (NAICS 23)	2,345
Accommodation and Food Services (NAICS 72)	1,919
Administrative and Support and Waste Management (NAICS 56)	1,767
Finance and Insurance (NAICS 52)	1,723
Real Estate and Rental and Leasing (NAICS 53)	1,305
Transportation and Warehousing (NAICS 48)	1,090
Wholesale Trade (NAICS 42)	976
Information (NAICS 51)	620
Manufacturing (NAICS 31)	581
Arts, Entertainment, and Recreation (NAICS 71)	468
Educational Services (NAICS 61)	434
Management of Companies and Enterprises (NAICS 55)	207
Public Administration (NAICS 92)	108
Agriculture, Forestry, Fishing and Hunting (NAICS 11)	79
Utilities (NAICS 22)	22
Mining, Quarrying, and Oil and Gas Extraction (NAICS 21)	14

In the last eight years, 32,528 startups were launched in the health care industry.

While the jobs created by first-year startups follow in the same key industries, they are less concentrated in health care and social assistance. Jobs are more evenly distributed in the other top NAICS codes, indicating a broader range of educational needs and training is needed to support these fledgling companies.

St. Louis Region Jobs Created by Startups (2015-2022)

Industry	Jobs
Health Care and Social Assistance (NAICS 62)	40,034
Accommodation and Food Services (NAICS 72)	15,247
Retail Trade (NAICS 44)	11,056
Professional, Scientific, and Technical Services (NAICS 54)	8,758
Other Services except Public Administration (NAICS 81)	6,666
Construction (NAICS 23)	6,077
Administrative and Support and Waste Management (NAICS 56)	5,324
Finance and Insurance (NAICS 52)	4,207
Transportation and Warehousing (NAICS 48)	4,162
Wholesale Trade (NAICS 42)	3,596
Real Estate and Rental and Leasing (NAICS 53)	3,390
Arts, Entertainment, and Recreation (NAICS 71)	2,908
Manufacturing (NAICS 31)	1,980
Educational Services (NAICS 61)	1,910
Information (NAICS 51)	1,532
Management of Companies and Enterprises (NAICS 55)	823
Agriculture, Forestry, Fishing and Hunting (NAICS 11)	341
Public Administration (NAICS 92)	148
Utilities (NAICS 22)	128
Mining, Quarrying, and Oil and Gas Extraction (NAICS 21)	80

8,758 jobs were created by scientific and technical services startups since 2015.

Conclusion

The first-year startup data highlights several trends. Only 1% of startups nationally are funded by venture capital, but those companies are the ones we hear about most in the media. Venture capital funding provides for fast growth in sectors like tech and science. The jobs in these sectors often have higher pay than jobs in the average startup. Venture capital also means that those investors will want a return on their investment at some point, requiring that company to sell or have a public stock offering.

The vast majority of startups in the St. Louis region are in traditional service and product sectors. These are the other 99% of the startups that are typically funded through debt and the revenue from the sales of goods and services. While they may grow more slowly than startups funded by investors, they grow to be cornerstones in neighborhoods, stay in our community rather than moving, and are not pressured to sell by investors. They are often the companies that sponsor local celebrations, school fund raisers and youth sports leagues.

Having startups across a range of industries is as important to our region as having corporations in a variety of industries. Both startups and larger corporations contribute to a vibrant ecosystem of idea creation and commercialization. Employees often migrate between small and large companies at different points in their careers. Having a strong innovation community is also attractive to companies that are seeking to relocate to the region.

Startup Job Creation Methodology

A new startup is identified with the first appearance of firm records in the employer file with no predecessor record in the Quarterly Census of Employment and Wages (QCEW). The QCEW contains individual records of wages paid for Unemployment Insurance (UI). In this method, new startups are new establishments. The QCEW data set does not include those who are self-employed or contract employees.

Firm-level job counts average employer-reported monthly employment in the QCEW employer file for quarterly observations. The number of jobs includes any employment – full-time, part-time and multiple jobs – but does not include those who are self-employed.

This report draws from raw QCEW data, and the statistical methods used for calculating total employment differs from the methods used from QCEW data published by the U.S. Bureau of Labor Statistics. The bureau uses a six-step statistical test that MOSourceLink is unable to replicate.

The number of startups for each year counts the number of new firms with fewer than 20 employees in each quarter for a year. The number of new jobs from startups is the number of jobs in Quarter 4 from new firms identified in Quarters 1, 2, 3, and 4.

Spotlight on Advanced Manufacturing

Advanced Manufacturing in St. Louis

Manufacturing in the St. Louis MSA employees 118,792 people. It represents 8.8% of the employment in the region, ranking as the fourth largest sector just as it did a decade earlier. Only the Healthcare, Wholesale & Retail Trade, and Leisure & Hospitality sectors employ more individuals. St. Louis makes up 38.1% of the Missouri workforce, and 42% of the state's manufacturing workforce.

Employment in the St. Louis manufacturing sector is up 10% from 2012, an increase of 10,781 workers. Overall employment was up 6% across all industries, with manufacturing outpacing that figure by 4%.

Top Five St. Louis Industry Employment

Industry	2022	2012
Health Care & Social Assistance	217,927	189,154
Wholesale & Retail Trade	205,687	207,329
Leisure & Hospitality	145,453	147,038
Manufacturing	118,792	108,011
Educational Services	102,981	106,826

Source: Quarterly Workforce Indicators, U.S. Census Bureau, Annual Averages

> " St. Louis is a hub for advanced manufacturing in the U.S.
>
> Our vertical integration from raw material processing to finished parts and goods combined with our distribution network, makes St. Louis a hub of hubs."
>
> Brandon Dempsey
> Conflux CoLearning

Changes in the Manufacturing Sector

Over the last 10 years, manufacturing jobs have shifted within the region. In 2012, 81.5% of the jobs were in the Missouri counties of the St. Louis MSA, with 18.5% located in the Illinois counties. By 2022, that had increased to 85% of the jobs residing in Missouri.

There are manufacturing jobs in every county in the MSA. In Missouri, those jobs are concentrated in St. Louis County (40.9% of manufacturing jobs), St. Louis City (14.3%), St. Charles County (13.7%) and Franklin County (8.2%). St. Louis County has grown manufacturing roles by 12% since 2012, to 47,881 jobs. While St. Louis City still employs the second-most manufacturing workers in the region, that number has dropped by 19% in the last decade to 16,768 jobs, while St. Charles County has increased manufacturing employment by 49% to 16,029 over that time. In Illinois, most manufacturing roles are in Madison (8.9%) and St. Clair (4.4%) counties.
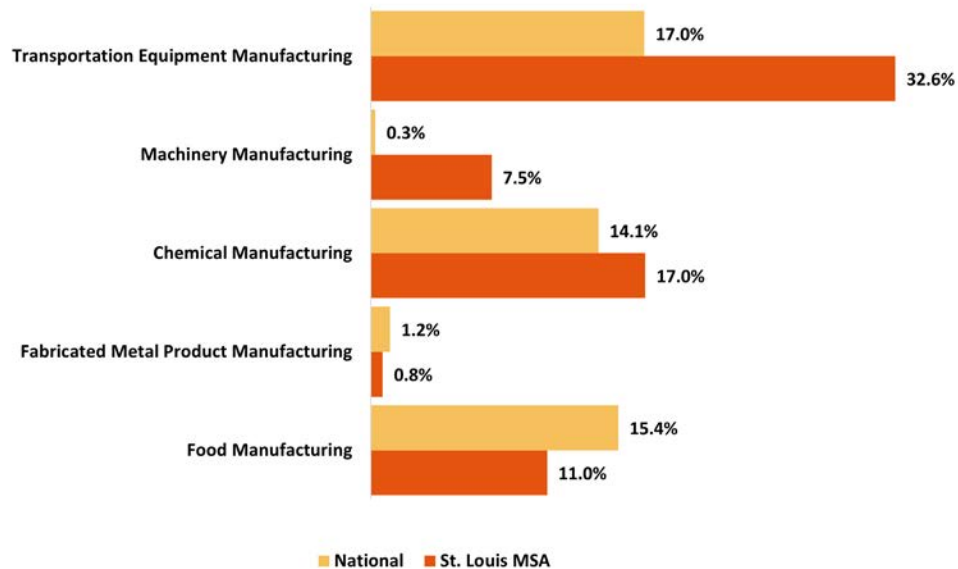
Beyond geography, manufacturing roles are changing by the type of manufacturing as well. In 2022, the top subsectors for employment within Manufacturing by three-digit NAICS codes are: Transportation Equipment (23,003 jobs), Machinery (13,114 jobs), Chemical (12,719 jobs), Fabricated Metal Product (10,514 jobs), and Food (10,507 jobs).

St. Louis MSA Employment Growth for Top 5 Manufacturing Subsectors from 2012-2022

Subsector	National	St. Louis MSA
Transportation Equipment Manufacturing	17.0%	32.6%
Machinery Manufacturing	0.3%	7.5%
Chemical Manufacturing	14.1%	17.0%
Fabricated Metal Product Manufacturing	1.2%	0.8%
Food Manufacturing	15.4%	11.0%

■ National ■ St. Louis MSA

These were the same top five subsectors in 2012, in the same order, though growth over the last decade has varied by subsector. Transportation Equipment Manufacturing jobs grew by 32.5%, outpacing the national job growth of 17% in this subsector. Fabricated Metal Product Manufacturing, on the other hand, only grew by 0.8%, still not far off the national growth rate of 1.2%.

> " The St. Louis region has several strong manufacturing sectors including Aerospace and Defense, Automotive, Biomedical & Life Sciences, AgTech, Geospatial & Location Services, Transportation and Logistics, Construction and Energy."
>
> Kory Mathews
> AMIC STL

St. Louis Perspective on Advanced Manufacturing

From our annual employer survey, we are able to assess the trends of manufacturing companies from our own region. For their outlook on employment growth, 67% of manufacturing companies that were surveyed expected to remain at the same level of employment this year, with no significant hiring or firing. Twenty-two percent expected to hire in some capacity, while 11% expected to decrease their workforce over the next year.

Last year's hiring forecast indicated that 42% of manufacturing companies had expected to hire during this year, as compared to 22% this year, a true dampening of expectations for growth through headcount. Manufacturers are focusing on two main tactics in their hiring efforts. Sixty-two percent of companies surveyed were offering increased wages to attract more workers, and also reported that they hired less experienced workers and would need to train them.

Manufacturers are partnering with other organizations to assist in hiring and training, with 17% of surveyed companies selecting 2-year colleges, training institutions, and nonprofit organizations. Fourteen percent of companies selected 4-year colleges and school districts as partners.

The Future of Advanced Manufacturing

The future of advanced manufacturing indicates a need for developing additional efficiencies. The aging of the American workforce in general means there will be fewer workers available to perform the same amount of work. This is especially true in the manufacturing sector. According to the Bureau of Labor Statistics, 26% of the manufacturing workforce nationally is age 55 or older. Nearly half of all manufacturing employees, or 7.4 million workers across the country, are age 45 or older. With lower birth rates, a much smaller population of workers is coming of age. Unless efficiencies are introduced through new processes or new technology, the U.S. will not be able to sustain the same level of production 20 years from now.

Additionally, the COVID pandemic highlighted our dependence on foreign countries for many parts and products, particularly semiconductor chips and pharmaceutical ingredients. The pandemic supply chain issues were significant in delaying the production and delivery of these key products, as well as highlighting our vulnerability to potential political and economic threats. Reshoring production for these items is in the best interest of the country, though the cost of labor and materials in other countries creates a very different cost model that would be difficult to replicate in the U.S. New production systems created here will only be successful if new efficiencies are created for a more sustainable business model.

St. Louis is not the only Midwest city working to grow its manufacturing base, nor are we unique in our own aging workforce or near-flat population growth. Supporting innovation in the sector and recognizing the need for change will be essential for manufacturing companies, our civic organizations and government and our workforce. Maintaining a healthy manufacturing sector is good for the St. Louis workforce and for the overall health of our regional economy and Missouri's economy.

State of the St. Louis Workforce Speaker and Panel

The State of the St. Louis Workforce event on August 16, 2023, featured Charles Gascon, senior economist at the Federal Reserve in St. Louis. His talk focused on both regional and national trends in advanced manufacturing. The panel discussion at the event looked to the future of the advanced manufacturing industry in St. Louis with Dr. Pittman moderating.

Visit **stlcc.edu/STLworkforce** to access a link to the event recording and to download this report.

Biographies

Charles S. Gascon
Federal Reserve Bank
 of St. Louis

Senior Economist

Charles S. Gascon is a senior economist in the Research division at the Federal Reserve Bank of St. Louis. Gascon analyzes economic conditions nationally and in the Eighth Federal Reserve District. Gascon reports on regional economic conditions to the Bank president and staff economists prior to Federal Open Market Committee (FOMC) meetings.

Kory Mathews
Advanced Manufacturing
 Innovation Center

CEO

Kory Mathews is CEO of the not-for-profit Advanced Manufacturing Innovation Center (AMIC) and a recently retired senior global aerospace and defense executive of the Boeing Company. AMIC focuses on diverse workforce development, advanced manufacturing research and development and production line/process prototyping across eight manufacturing sectors.

Chauncey Nelson
Gateway South
 Innovation District

President/CEO

Chauncey Nelson works at the intersection of real estate and social work, collaborating with institutions, corporations and community-based organizations. In this role, Nelson steers effective collaboration and produces sustainable approaches to social impact and economic vitality. Prior to his current role, Chauncey was a Good Developments Group community liaison.

Kevin Webb
API Innovation Center

COO

Kevin Webb is chief operating officer at Active Pharmaceutical Ingredients (API) Innovation Center, a non-profit dedicated to delivering a competitive commercial supply of U.S.-made pharmaceutical ingredients to address national health security. As Chief Operating Officer, Webb is currently leading national efforts to strengthen domestic pharmaceutical manufacturing.

Jeff Pittman, Ph.D.
St. Louis Community College

Chancellor

Jeff Pittman, Ph.D., leads STLTranformed, a multi-year, multi-campus and multi-million-dollar initiative that ensures the College continues to meet the region's ever changing and ever-increasing workforce development demands. His work continues STLCC's tradition of providing quality, affordable and accessible education and workforce training for all St. Louis area residents in support of area businesses.

Phyllis Ellison, M.B.A.
St. Louis Community College

Associate Vice Chancellor, Workforce Sotions Group

Phyllis Ellison leads the College's corporate and community work-force development programs, personal enrichment education, professional development and entrepreneurial initiatives that meet the expanding training and skill development needs of local, regional and national businesses in a range of industries.

Acknowledgments

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The 2023 *State of the St. Louis Workforce* report was made possible by the collaborative efforts of staff from the St. Louis Community College Workforce Solutions Group and the Missouri Economic Research and Information Center (MERIC), the research unit of the Missouri Department of Economic Development.

Appendix:
State of the St. Louis Workforce Employer Survey 2023

The employer survey was conducted as phone interviews on weekdays starting May 12, 2023 and ending June 9, 2023. Only complete surveys are used in this report.

Initial Question Employees
First, including yourself, how many employees does your company CURRENTLY employ in your area?

Less than 5 (Thank & Terminate)	01
5 to 10	02
11 to 49	03
50 or more	04
(Do not read) Refuse - Thank & Terminate	97
(Do not read) Don't know/Not sure - Thank & Terminate	98

1a. Over the past 12 months, would you say your employment levels have increased significantly (by 15% or more), increased slightly (by less than 15%), remained the same as before, decreased slightly (by less than 15%), or decreased significantly (by 15% or more)?

Increased significantly, by 15% or more	01
Increased slightly, by less than 15%	02
Remained the same as before	03
Decreased slightly, by less than 15%	04
Decreased significantly, by 15% or more	05
(Do not read) Refuse	97
(Do not read) Don't know/Not sure	98

1b. (If there was a significant increase or decrease in 1a) Was your significant increase or decrease due to COVID?

Yes	01
No	02
(Do not read) Not applicable	98

2. Looking ahead over the next 12 months, how does your business PLAN to change your employment levels? Would you say your employment levels will increase significantly (by 15% or more), increase slightly (by less than 15%), remain the same as before, decrease slightly (by less than 15%), or decrease significantly (by 15% or more)

Increase significantly, by 15% or more	01
Increase slightly, by less than 15%	02
Remain the same as before	03
Decrease slightly, by less than 15%	04
Decrease significantly, by 15% or more	05
(Do not read) Refuse	97
(Do not read) Don't know/Not sure	98

3. If you were to add employees in the next 12 months, which of the following methods would you use?
(Read list; enter code for each method would use; enter all that apply.)

Recalling furloughed workers	01
Recalling workers from a lay-off list	02
Hiring new full-time employees	03
Hiring new part-time employees	04
Hiring contract workers	05
Using a temporary agency	06
(Do not read) Not applicable - Not wanting to add employees	95
(Do not read) Would not use any listed method	96
(Do not read) Refuse	97

(Do not read) Don't know/Not sure	98

4a. Please tell me if you have encountered the following barriers to expanding your employment level.
(Rotate barriers; ask "Any other barrier?" last)

Shortage of workers with knowledge or skills	01
Shortage of available training programs	02
Economic conditions	03
Government policies or regulations	04
Lack of information regarding the occupation	05
Lack of access to transportation to get to work	06
Lack of access to child care	07
Any other barrier? (If "Yes" - Record)	08
(Do not read) Have not encountered any barriers to expanding employment level	95
(Do not read) Not applicable - Not expanding employment level	96
(Do not read) Refuse	97
(Do not read) Don't know/Not sure	98

4b. (Re: each barrier named on Q.4a)
Please tell me how large of a barrier each is to your business using a 1-to-5 scale where 1 is "insignificant" and 5 is a "critical barrier." You may also use any number between 1 and 5. And, if an item is not applicable to your business, please tell me so.
96 - Not applicable
97 - Refuse
98 - Don't know/Not sure

Shortage of workers with knowledge or skills	__
Shortage of available training programs	__
Economic conditions	__
Government policies or regulations	__
Lack of information regarding the occupation	__
Lack of access to transportation to get to work	__
Lack of access to child care	__
Other barrier	__

5. Next, I am going to read some possible shortcomings of job applicants and ask if you have or have not seen these characteristics in a significant number of applicants during the last 12 months. I would then like you to rank the importance of that shortcoming to your business on a 1 to 5 scale where 1 is "not at all important" and 5 is "very important."

5a-1. Please tell me if you have or have not noticed a significant number of applicants with "Poor work habits" (including attendance, punctuality, and attention to job).

Have seen this characteristic in job applicants	01
Have not seen this characteristic in job applicants	02
(Do not read) Refuse	97
(Do not read) Don't know/Not sure	98

5a-2. On the 1 to 5 scale, how important is this applicant shortcoming to

your business?
     (Do not read) 98 - Don't know/Not sure
     Poor work habits   __

5b-1. Please tell me if you have or have not noticed a significant number of applicants with a "Lack of general knowledge about business or industry."
     Have seen this characteristic in job applicants   01
     Have not seen this characteristic in job applicants   02
     (Do not read) Refuse   97
     (Do not read) Don't know/Not sure   98

5b-2. On the 1 to 5 scale, how important is this applicant shortcoming to your business?
     (Do not read) 98 - Don't know/Not sure
Lack of general knowledge about business or industry   __

5c-1. Please tell me if you have or have not noticed a significant number of applicants with a "Lack of ability to interact effectively with people of different cultures and socio-economic backgrounds."
     Have seen this characteristic in job applicants   01
     Have not seen this characteristic in job applicants   02
     (Do not read) Refuse   97
     (Do not read) Don't know/Not sure   98

5c-2. On the 1 to 5 scale, how important is this applicant shortcoming to your business?
     (Do not read) 98 - Don't know/Not sure
Lack of ability to interact effectively with people of
     different cultures and socio-economic backgrounds   __

5d-1. Please tell me if you have or have not noticed a significant number of applicants with a "Lack of communication or interpersonal skills."
     Have seen this characteristic in job applicants   01
     Have not seen this characteristic in job applicants   02
     (Do not read) Refuse   97
     (Do not read) Don't know/Not sure   98

5d-2. On the 1 to 5 scale, how important is this applicant shortcoming to your business?
     (Do not read) 98 - Don't know/Not sure
Lack of communication or interpersonal skills   __

5e-1. Please tell me if you have or have not noticed a significant number of applicants with a "Lack of willingness to learn or inability to learn."
     Have seen this characteristic in job applicants   01
     Have not seen this characteristic in job applicants   02
     (Do not read) Refuse   97
     (Do not read) Don't know/Not sure   98

5e-2. On the 1 to 5 scale, how important is this applicant shortcoming to your business?
     (Do not read) 98 - Don't know/Not sure
Lack of willingness to learn or inability to learn   __

5f-1. Please tell me if you have or have not noticed a significant number of applicants with a "Lack of teamwork or collaboration."
     Have seen this characteristic in job applicants   01
     Have not seen this characteristic in job applicants   02
     (Do not read) Refuse   97
     (Do not read) Don't know/Not sure   98

5f-2. On the 1 to 5 scale, how important is this applicant shortcoming to your business?

     (Do not read) 98 - Don't know/Not sure
Lack of teamwork or collaboration   __

5g-1. Please tell me if you have or have not noticed a significant number of applicants with a "Lack of general computer skills."
     Have seen this characteristic in job applicants   01
     Have not seen this characteristic in job applicants   02
     (Do not read) Refuse   97
     (Do not read) Don't know/Not sure   98

5g-2. On the 1 to 5 scale, how important is this applicant shortcoming to your business?
     (Do not read) 98 - Don't know/Not sure
     Lack of general computer skills   __

5h-1. Please tell me if you have or have not noticed a significant number of applicants with a "Lack of critical thinking and problem solving."
     Have seen this characteristic in job applicants   01
     Have not seen this characteristic in job applicants   02
     (Do not read) Refuse   97
     (Do not read) Don't know/Not sure   98

5h-2. On the 1 to 5 scale, how important is this applicant shortcoming to your business?
     (Do not read) 98 - Don't know/Not sure
     Lack of critical thinking and problem solving   __

5i-1. Please tell me if you have or have not noticed a significant number of applicants with an "Inability to think creatively or 'out of the box'."
     Have seen this characteristic in job applicants   01
     Have not seen this characteristic in job applicants   02
     (Do not read) Refuse   97
     (Do not read) Don't know/Not sure   98

5i-2. On the 1 to 5 scale, how important is this applicant shortcoming to your business?
     (Do not read) 98 - Don't know/Not sure
     Inability to think creatively or 'out of the box'   __

5j-1. Please tell me if you have or have not noticed a significant number of applicants with a "Lack of writing skills."
     Have seen this characteristic in job applicants   01
     Have not seen this characteristic in job applicants   02
     (Do not read) Refuse   97
     (Do not read) Don't know/Not sure   98

5j-2. On the 1 to 5 scale, how important is this applicant shortcoming to your business?
     (Do not read) 98 - Don't know/Not sure
     Lack of writing skills   __

5k-1. Please tell me if you have or have not noticed a significant number of applicants with a "Lack of basic math skills."
     Have seen this characteristic in job applicants   01
     Have not seen this characteristic in job applicants   02
     (Do not read) Refuse   97
     (Do not read) Don't know/Not sure   98

5k-2. On the 1 to 5 scale, how important is this applicant shortcoming to your business?
     (Do not read) 98 - Don't know/Not sure
     Lack of basic math skills   __

5l-1. Please tell me if you have or have not noticed a significant number of applicants with a "Lack of technical skills specific to the job."

Have seen this characteristic in job applicants	01
Have not seen this characteristic in job applicants	02
(Do not read) Refuse	97
(Do not read) Don't know/Not sure	98

5l-2. On the 1 to 5 scale, how important is this applicant shortcoming to your business?

(Do not read) 98 - Don't know/Not sure
Lack of technical skills specific to the job   __

5m-1. Please tell me if you have or have not noticed a significant number of applicants with an "Inability to understand written and graphical information."

Have seen this characteristic in job applicants	01
Have not seen this characteristic in job applicants	02
(Do not read) Refuse	97
(Do not read) Don't know/Not sure	98

5m-2. On the 1 to 5 scale, how important is this applicant shortcoming to your business?

(Do not read) 98 - Don't know/Not sure
Inability to understand written and graphical information   __

5n-1. Please tell me if you have or have not noticed a significant number of applicants with an "Inability to pass a drug test or has a substance abuse issue."

Have seen this characteristic in job applicants	01
Have not seen this characteristic in job applicants	02
(Do not read) Refuse	97
(Do not read) Don't know/Not sure	98

5n-2. On the 1 to 5 scale, how important is this applicant shortcoming to your business?

(Do not read) 98 - Don't know/Not sure
Inability to pass a drug test or has a substance abuse issue   __

6. Now we would like you to share the strengths you have seen in job applicants during the last 12 months. Please rank each strength on a 1 to 5 scale where 1 is "did not see this strength in any applicants" and 5 is "saw this strength in all applicants."

(Do not read) 98 - Don't know/Not sure

6a. Determination	__
6b. Personal discipline	__
6c. Creativity	__
6d. Respectfulness	__
6e. Honesty	__
6f. Curiosity	__
6g. Verbal communication skills	__
6h. Writing skills	__
6i. Technical skills	__
6j. Taking the initiative	__
6k. Responsibility	__
6l. Positivity	__
6m. Ambition	__
6n. Dependability	

7a. Are you experiencing a shortage of skilled applicants for your organization?

Yes	01
No (if "no" skip to question 8)	02
(Do not read) Refuse	97
(Do not read) Don't know/Not sure	98

7b. (If experiencing shortage of skilled applicants per Q.7a)
Please tell me the skill level required to meet your skill shortages. Approximately what percentage of the SHORTAGES you are experiencing require high-skill applicants (those with a 4-year degree or higher); middle-skill applicants (training or education beyond high school, but less than a 4-year degree); and low-skill applicants (high school or less). What percent of positions require …
Answers MUST total 100%
Refuse = 97
Don't know/Not sure = 98

High-skill, requiring a 4-year degree or higher	___
Middle-skill, training or education beyond high school, but less than a 4-year degree	___
Low-skill, requiring high school or less	___

7c. (If experiencing shortage of skilled applicants per Q.7a)
Please tell me if you are taking any of the following measures to meet the skill shortages of applicants.

Hiring from outside the St. Louis area	01
Hiring from outside the United States	02
Hiring contractors	03
Forced to hire less experienced workers and then train them	04
Invest in automation instead of hiring	05
Offering increased wages due to shortage of experienced workers	06
(Do not read) Not taking any of listed measures	96
(Do not read) Refuse	97
(Do not read) Don't know/Not sure	98

8. Which of the following methods do you use to assist current workers to address your company's need for new or increased skills?
(Read list; enter all that apply.)

In-house classroom training	01
On-the-job training	02
Vendor training	03
Apprenticeship programs	04
Internship programs	05
Community college provided customized training or education	06
Vocational training	07
Tuition reimbursement	08
Online courses	09
Provide flexible schedule for outside continuing education	10
(Do not read) Not applicable – Do not need new or increased skills	95
(Do not read) Refuse	97
(Do not read) Don't know/Not sure	98

9. Now we have some questions about your company's workforce by job function.

9a. Do you employ staff in the Accounting or Finance function?

Yes	01
No (if "no" skip to question 9b)	02
(Do not read) Refuse	97
(Do not read) Don't know/Not sure	98

9aa. (If employ staff in Accounting or Finance function per Q.9a)
Are you seeing a shortage of skilled applicants in the Accounting or Finance function?

Yes	01
No (if "no" skip to question 9b)	02
(Do not read) Refuse	97
(Do not read) Don't know/Not sure	98

9aaa. (If seeing shortage of skilled applicants in the Accounting or Finance function per Q.9aa)
Please tell me the skill level of applicants required to meet your Accounting or Finance skill shortages. Approximately what percentage of the shortages you are experiencing require high-skill applicants (those with a 4-year degree or higher); middle-skill applicants (training or education beyond high school, but less than a 4-year degree); and low-skill applicants (high school or less).
What percent of positions require ...
Answers MUST total 100%
Refuse = 97
Don't know/Not sure = 98

High-skill, requiring a 4-year degree or higher	___
Middle-skill, training or education beyond high school, but less than a 4-year degree	___
Low-skill, requiring high school or less	___

9b. Do you employ staff in the Information Technology function?

Yes	01
No (if "no" skip to question 9c)	02
(Do not read) Refuse	97
(Do not read) Don't know/Not sure	98

9bb. (If employ staff in Information Technology function per Q.9b)
Are you seeing a shortage of skilled applicants in the Information Technology function?

Yes	01
No (if "no" skip to question 9c)	02
(Do not read) Refuse	97
(Do not read) Don't know/Not sure	98

9bbb. (If seeing shortage of skilled applicants in the Information Technology function per Q.9bb)
Please tell me the skill level of applicants required to meet your Information Technology skill shortages. Approximately what percentage of the shortages you are experiencing require high-skill applicants (those with a 4-year degree or higher); middle-skill applicants (training or education beyond high school, but less than a 4-year degree); and low-skill applicants (high school or less).
What percent of positions require ...
Answers MUST total 100%
Refuse = 97
Don't know/Not sure = 98

High-skill, requiring a 4-year degree or higher	___
Middle-skill, training or education beyond high school, but less than a 4-year degree	___
Low-skill, requiring high school or less	___

9c. Do you employ staff in the Customer Service function?

Yes	01
No (if "no" skip to question 9d)	02
(Do not read) Refuse	97
(Do not read) Don't know/Not sure	98

9cc. (If employ staff in Customer Service function per Q.9c)
Are you seeing a shortage of skilled applicants in the Customer Service function?

Yes	01
No (if "no" skip to question 9d)	02
(Do not read) Refuse	97
(Do not read) Don't know/Not sure	98

9ccc. (If seeing shortage of skilled applicants in the Customer Service function per Q.9cc)
Please tell me the skill level of applicants required to meet your Customer Service skill shortages. Approximately what percentage of the shortages you are experiencing require high-skill applicants (those with a 4-year degree or higher); middle-skill applicants (training or education beyond high school, but less than a 4-year degree); and low-skill applicants (high school or less).
What percent of positions require ...
Answers MUST total 100%
Refuse = 97
Don't know/Not sure = 98

High-skill, requiring a 4-year degree or higher	___
Middle-skill, training or education beyond high school, but less than a 4-year degree	___
Low-skill, requiring high school or less	___

9d. Do you employ staff in the Business Management function?

Yes	01
No (if "no" skip to question 9e)	02
(Do not read) Refuse	97
(Do not read) Don't know/Not sure	98

9dd. (If employ staff in Business Management function per Q.9d)
Are you seeing a shortage of skilled applicants in the Business Management function?

Yes	01
No (if "no" skip to question 9e)	02
(Do not read) Refuse	97
(Do not read) Don't know/Not sure	98

9ddd. (If seeing shortage of skilled applicants in the Business Management function per Q.9dd)
Please tell me the skill level of applicants required to meet your Business Management skill shortages. Approximately what percentage of the shortages you are experiencing require high-skill applicants (those with a 4-year degree or higher); middle-skill applicants (training or education beyond high school, but less than a 4-year degree); and low-skill applicants (high school or less).
What percent of positions require ...
Answers MUST total 100%
Refuse = 97
Don't know/Not sure = 98

High-skill, requiring a 4-year degree or higher	___
Middle-skill, training or education beyond high school, but less than a 4-year degree	___
Low-skill, requiring high school or less	___

9e. Do you employ staff in the Skilled Trades function?

Yes	01
No (if "no" skip to question 9f)	02
(Do not read) Refuse	97
(Do not read) Don't know/Not sure	98

9ee. (If employ staff in Skilled Trades function per Q.9e)
Are you seeing a shortage of skilled applicants in the Skilled Trades function?

Yes	01
No (if "no" skip to question 9f)	02
(Do not read) Refuse	97
(Do not read) Don't know/Not sure	98

9eee. (If seeing shortage of skilled applicants in the Skilled Trades unction per Q.9ee)
Please tell me the skill level of applicants required to meet your Skilled Trades skill shortages. Approximately what percentage of the shortages you are experiencing require high-skill applicants (those with a 4-year degree or higher); middle-skill applicants (training or education beyond high school, but less than a 4-year degree); and low-skill applicants (high school or less).
What percent of positions require ...
Answers MUST total 100%
Refuse = 97
Don't know/Not sure = 98

High-skill, requiring a 4-year degree or higher	___
Middle-skill, training or education beyond high school, but less than a 4-year degree	___
Low-skill, requiring high school or less	___

9f. Do you employ staff in the Manufacturing, Production & Maintenance function?

Yes	01
No (if "no" skip to question 9g)	02
(Do not read) Refuse	97
(Do not read) Don't know/Not sure	98

9ff. (If employ staff in Manufacturing, Production & Maintenance function per Q.9f)
Are you seeing a shortage of skilled applicants in the Manufacturing, Production & Maintenance function?

Yes	01
No (if "no" skip to question 9g)	02
(Do not read) Refuse	97
(Do not read) Don't know/Not sure	98

9fff. (If seeing shortage of skilled applicants in the Manufacturing, Production & Maintenance function per Q.8ff)
Please tell me the skill level of applicants required to meet your Manufacturing, Production & Maintenance skill shortages. Approximately what percentage of the shortages you are experiencing require high-skill applicants (those with a 4-year degree or higher); middle-skill applicants (training or education beyond high school, but less than a 4-year degree); and low-skill applicants (high school or less).
What percent of positions require ...
Answers MUST total 100%
Refuse = 97
Don't know/Not sure = 98

High-skill, requiring a 4-year degree or higher	___
Middle-skill, training or education beyond high school, but less than a 4-year degree	___
Low-skill, requiring high school or less	___

9g. Do you employ staff in the Patient Care function?

Yes	01
No (if "no" skip to question 10)	02
(Do not read) Refuse	97
(Do not read) Don't know/Not sure	98

9gg. (If employ staff in Patient Care function per Q.8g)
Are you seeing a shortage of skilled applicants in the Patient Care function?

Yes	01
No (if "no" skip to question 10)	02
(Do not read) Refuse	97
(Do not read) Don't know/Not sure	98

9ggg. (If seeing shortage of skilled applicants in the Patient Care function per Q.9gg)
Please tell me the skill level of applicants required to meet your Patient Care skill shortages. Approximately what percentage of the shortages you are experiencing require high-skill applicants (those with a 4-year degree or higher); middle-skill applicants (training or education beyond high school, but less than a 4-year degree); and low-skill applicants (high school or less).
What percent of positions require ...
Answers MUST total 100%
Refuse = 97
Don't know/Not sure = 98

High-skill, requiring a 4-year degree or higher	___
Middle-skill, training or education beyond high school, but less than a 4-year degree	___
Low-skill, requiring high school or less	___

10. In your business, what percentage of your TOTAL positions requires each of the following levels of experience? What percent of positions require ...
Answers MUST total 100%
Refuse = 97
Don't know/Not sure = 98

A minimum of 4 or more years of experience	___
A minimum of 1 to 3 years of experience	___
Some experience, but less than 1 year	___
No experience	___

11. In your business, what percentage of your TOTAL positions require each of the following levels of education as a minimum requirement? What percent of positions require...
Answers MUST total 100%
Refuse = 97
Don't know/Not sure = 98

High-skill, requiring a 4-year degree or higher	___
Middle-skill, training or education beyond high school, but less than a 4-year degree	___
Low-skill, requiring high school or less	___

12. What percentage of jobs in your business are available for individuals with industry relevant short-term training, meaning not more than 6 months past high school?

No jobs	01
1 to 49% of jobs	02
50 to 100% of jobs	03
(Do not read) Refuse	97
(Do not read) Don't know/Not sure	98

13. Do you offer any of the following work-based learning experiences for students and young adults?

(Do not read) Refuse	97
(Do not read) Don't know/Not sure	98

13a. Paid internships
Yes	01
No	02

13b. Unpaid internships
Yes	01
No	02

13c. Career shadowing
Yes	01
No	02

13d. Field trips
Yes	01
No	02

13e. Classroom presentations
Yes	01
No	02

13f. Youth apprenticeships
Yes	01
No	02

13g. (If 13a through 13f are all "No") Would you be interested
in offering work-based learning experiences for students and young adults?
Yes	01
No	02

14. Do you currently have partnerships with any of the following
organizations to help you source talent?
(Do not read) Refuse	97
(Do not read) Don't know/Not sure	98

14a. Job Centers or Workforce Investment Boards
Yes	01
No	02

14b. School districts or individual K-12 schools
Yes	01
No	02

14c. 2-year colleges
Yes	01
No	02

14d. 4-year colleges
Yes	01
No	02

14e. Training institutions
Yes	01
No	02

14f. Nonprofit organizations
Yes	01
No	02

14g. Missouri Department of Higher Education and Workforce
Development
Yes	01
No	02

14h. Other (please record)
Yes	01
No	02

15. What percentage of jobs in your firm receives each of the following
types of background checks prior to hire?
Criminal check, percentage	____
Financial check, percentage	____
Drug screen, percentage	____
eVerify check, percentage	____
Social media check, percentage	____
Professional license or certification check, percentage	____
Check by an outside service, percentage	____

16. What aspects of DEI – Diversity, Equity, and Inclusion – does your business
incorporate?
(Do not read) Refuse	97
(Do not read) Don't know/Not sure	98

16a. A DEI strategy or plan
Yes	01
No	02

16b. An Equal Opportunity Employer notice in job postings
Yes	01
No	02

16c. A DEI statement on your website or in a handbook
Yes	01
No	02

16d. A DEI committee
Yes	01
No	02

16e. Harassment or sensitivity course or training
Yes	01
No	02

17. Which statement best describes your company's position on hiring an
applicant convicted of a felony offense who has completed their sentence and/
or probation?
(Read list; single response only)
Would not consider applicant for any position	01
Depends on the nature of the felony and the time since the offense	02
Would consider for some jobs but not for others	03
Would consider the applicant for any job for which they are qualified	04
(Do not read) Refuse	97
(Do not read) Don't know/Not sure	98

18a. Do you currently have employees working remotely?
Yes	01
No (if "no" skip to question 19)	02
(Do not read) Refuse	97
(Do not read) Don't know/Not sure	98

18b. Do you expect the number of your remote workers to increase,
stay the same, or decrease over the next 12 months?
Increase	01
Stay the same	02
Decrease	03
(Do not read) Refuse	97
(Do not read) Don't know/Not sure	98

19. Finally, we want to understand the characteristics that best define a "good"
job. Please rank the importance of each of the following job characteristics on a
1 to 5 scale where 1 is "not at all important" and
5 is "very important."
(Do not read) Refuse	97
(Do not read) Don't know/Not sure	98
Health insurance	____
Pay rate	____
Sense of purpose	____
Accessibility	____
Retirement plan	____
Job stability	____
Paid time off (vacation or sick leave)	____
Flexibility	____
Paid family leave	____
Inclusiveness, a sense of belonging	____