

**GSG**

# Labor Supply Certification

**Moberly/Randolph County,  
Missouri Laborshed**



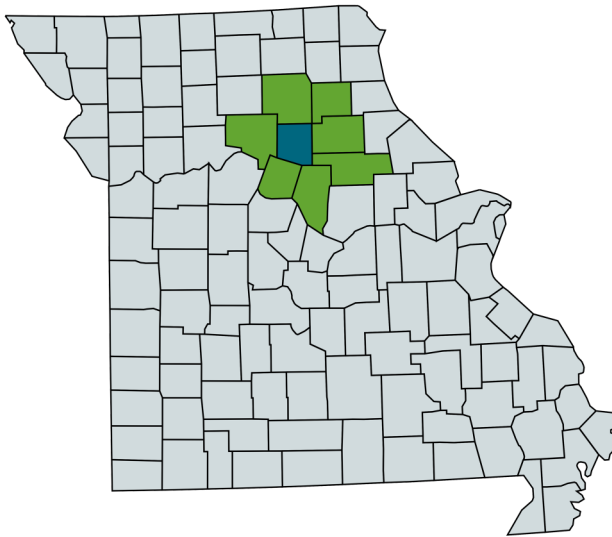
Underemployment

Available Skills

Desired Wages

# Moberly/Randolph County Labor Supply Certification

## Partners in Economic Development



**Moberly Counties:**  
Audrain, Boone, Chariton,  
Howard, Macon, Monroe,  
Randolph, Shelby

*moberly*  
area::edc



## For Opportunity and Growth

January 2019



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# Executive Summary

## Introduction

Moberly/Randolph County (Moberly) commissioned a Labor Supply Study to measure the amount and quality of potential employees in an eight county area labor market (ALM). The eight counties are: Audrain, Boone, Chariton, Howard, Macon, Monroe, Randolph, and Shelby.

The purpose of this report is to assess the available workforce for Moberly which in aggregate includes eight counties as the Area Labor Market. The total available workforce represents those who indicate that they are looking for employment or would consider changing their employment for the right job opportunity. However, on occasion, it is advantageous to compare the total available workforce with data from all respondents. At that time the terminology used will be Census Population Estimate, Census 18-64 Population Estimate, Census Male Population Estimate, and Census Female Population Estimate.

## General Findings, Opportunities, and Challenges

The Labor Supply Certification Study shows that Brookfield provides a stable and productive workforce. The availability, education, and skills add value and competitiveness to the area labor market. The components of this study quantify the strengths and challenges of this laborforce. The methodology of the research process is presented in Appendix B.

A subset of the total available workforce of interest to many employers in a large scale hiring mode are those who are identified as underemployed. These individuals are currently working and would take a better job if offered and they possess the skills, education, and experience to qualify them to do so. Of the 154,075 persons in the total available workforce, 46,571 are considered underemployed (see more on page 11).

With the right employment opportunities, Moberly appears positioned to retain and attract the talent necessary for growth of new and existing businesses representing regional, national, and international markets. Moberly has several advantages. The location provides advantages with rural amenities with easy access to both two and four-year education institutions near the ALM. Moberly has a diverse workforce talent pool within easy commute to most local and county labor market centers and reflects the cost advantages of a rural setting.

**Total Available  
Workforce**  
154,075

**Underemployed**  
46,571

## Workforce Availability Findings

The workforce availability findings reflect the views and perspectives of people between the ages of 18 and 64 who would consider seeking or changing employment. This group represents the supply side of the workforce market. The overall findings are as follows:

- About 57 percent (154,075 persons) of the Census Population Estimate in the Overall ALM is considered to be in the Total Available Workforce.
- It is estimated 25,145 non-worker and 128,930 persons in the worker available segments of the total available workforce are seeking different employment or are willing to change jobs if the right opportunity arises.
- The non-worker available segment of the total available workforce is composed of 3,588 homemakers, 5,871 retirees, and 15,685 unemployed.
- Approximately 30 percent of the total available workforce are underemployed (46,571).
- 34 percent of the total available workforce would be interested in employment with a wage up to \$15.99 per hour. The average desired wage rate per hour for the occupational clusters shows that the professional/technical group is seeking \$27.84; production/repair/installation, \$20.25; service sector, \$20.81; and the non-worker available group, \$20.19.
- The education level of the total available workforce includes 84.1 percent with at least some college education and 99.9 percent with at least a high school diploma.
- The total available workforce is willing to commute an average of 23 minutes/miles one way. Of the total available workforce, 83.8 percent (129,133) would travel more than 10 minutes/miles one way for work while 24.3 percent (37,393) would commute more than 30 minutes/miles and 4.4 percent (6,775) would travel more than 50 minutes/miles.
- The overall average age of the total available workforce is 39. The average age of the worker available workforce by occupational cluster is 42 for management, 40 for production/repair/installation, 37 for professional/technical, and 38 for service sector.
- The top motivators for changing jobs among those open for the right opportunities are 84 percent Salary, 67 percent Health Care, and 45 percent Flexible Hours.
- A majority, 84 percent, of the worker available workforce stated they are willing to work outside of their primary field of employment (i.e., those in manufacturing would be willing to work in the service sector, etc.).
- The average years on the job for the Overall ALM is 6.4 years which reflects both a stable and mature workforce.
- The underemployed provide the best opportunity for potential applicants. They represent a subset of the total available workforce that is normally more experienced, better educated, and more motivated than the total available workforce in general.

# Overview

## Introduction

The primary purpose of the Moberly/Randolph County (Moberly) Labor Supply Study is to determine the number of workers available for employers considering expansions and major investments. The total available workforce represents respondents who indicate they are either looking for employment or would consider changing jobs for the right employment opportunities. The key advantage of a Labor Supply analysis is that it expands the pool of potential workers by including workers excluded from the civilian labor force (CLF). It also allows researchers to examine those members of the Area Labor Market (ALM) pool who have a propensity to consider a job opportunity given their employment expectations.

The focus of this study is the Moberly ALM; defined for the purpose of this study as the area or region from which the labor market draws its commuting workers. The Moberly ALM consists of eight counties which are part of the larger Northeast Missouri Development Partnership (NMDP) region with a common methodology and database. This report also includes workers who are commuting out of the designated ALM to work but would be willing to work closer to home with the right employment opportunities. On occasion, it is advantageous to compare the total available workforce with data from all respondents. At that time the terminology used will be census 18-64 population estimate and total available workforce. The following table provides an overview of the total available workforce including the subset groups from the worker available and the non-worker available population within the ALM.

The findings from this survey are based on a type of stratified random marketing and social media campaign of 989 adults living in the NMDP ALM. The NMDP along with Moberly contracted with Growth Services Group (GSG) to design and administer the Labor Supply Study and Notionfront of Moberly, MO to provide the social media respondents. In 989 of these households an adult who is working or non-working between the ages of 18 and 64 participated in the survey. When all 989 respondents are included in the analysis, the survey aggregate results have a margin of error of +/- 5 percent. Subsets of the study group may have a higher error rate. Very granular data points such as individual Household Income ranges by single Age Groups may have a confidence level of 90% or less. A more detailed description of the survey process and methodology is presented in Appendix B.

### Total Available Workforce (Overview)

Category 18-64	Overall	Percent
<b>Total Available Workforce*</b>	<b>154,075</b>	<b>100.0%</b>
<b>Worker Available (Willing To Change)</b>	<b>128,930</b>	<b>83.7%</b>
Underemployed	46,571	30.2%
Seeking Different Employment	29,051	18.9%
Willing To Change	53,307	34.6%
<b>Non-worker Available (Willing To Work)</b>	<b>25,145</b>	<b>16.3%</b>
Unemployed	15,685	10.2%
Homemaker	3,588	2.3%
Retired	5,871	3.8%

\*While all those in the worker available workforce are willing to change with the right opportunity, 29,051 are seeking different employment and 46,571 are identified as underemployed and willing to change. The 53,307 Willing to Change are willing to change only for the right opportunity.

In the Non-worker 25,145, all are willing to work with the right opportunity. The unemployed (not currently working) includes both unemployed as defined by BLS (those who are seeking employment) as well as those that are not looking but are willing to accept the right opportunity and not covered in the BLS definition.



# Available Workforce

## Total Available Workforce

The following table describes the total available workforce in the ALM. The total available workforce represents 154,075 people which consists of 128,930 working and 25,145 non-working. This demonstrates the workforce of the region is sufficient in scope and diversity to support most employers considering expansion or location in the ALM.

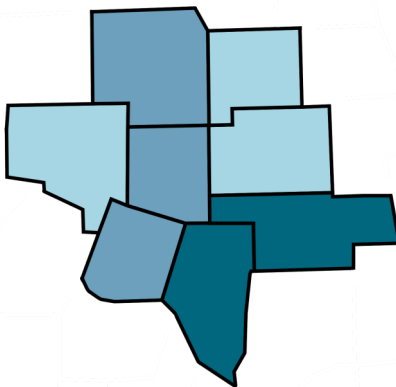
The map shows how each county in the ALM compares to all the other counties in terms of percent of the total available workforce in the ALM. Each county is grouped into one of three categories specified in the legend, each group making up approximately one third of the ALM counties.

The summary table for the ALM shows a total available workforce of 154,075, 56.7 percent of the estimated census population and 86.8 percent of the Estimated Census 18-64 Population. The table further presents the subsets of the total available workforce and underemployed by gender and age groupings. Men make up 47.2 percent and females 52.8 percent of the total available workforce. Those in Age 55-64 group consider themselves significantly less underutilized or underemployed at 15 percent than those in the other two age groups.

## Available Workforce Work Status

Category	Population	Percent
<b>Total Available Workforce</b>	<b>154,075</b>	<b>100.0%</b>
<b>Worker Available</b>	<b>128,930</b>	<b>83.7%</b>
Working Student	18,739	12.2%
Working (withholdings)	102,132	66.3%
Self-employed (no withholdings)	8,059	5.2%
<b>Non-Worker Available</b>	<b>25,145</b>	<b>16.3%</b>
Unemployed	11,379	7.4%
Homemaker	3,588	2.3%
Retired	5,871	3.8%
Non-working Student	4,306	2.8%

## Sources of Available Workforce in Moberly by County



Category	Color
Less than 3%	Light Blue
3% to 8%	Medium Blue
Greater than 8%	Dark Blue

## Summary Workforce Results

Characteristics	Overall	Percent
<b>Population and Civilian Labor Force</b>		
Census Population	271,674	100.0%
Census 18-64 Population	177,412	100.0%
Census 18-64 Male Population	86,657	48.8%
Census 18-64 Female Population	90,755	51.2%
<b>Available Workforce</b>		
Total Available Workforce	154,075	100.0%
Male	72,696	47.2%
Female	81,378	52.8%
Age 18-29	57,431	37.3%
Age 30-54	68,600	44.5%
Age 55-64	28,044	18.2%
<b>Underemployed</b>		
Underemployed	46,571	100.0%
Male	23,333	50.1%
Female	23,238	49.9%
Age 18-29	17,098	36.7%
Age 30-54	22,278	47.8%
Age 55-64	7,195	15.4%

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

\* Underemployment is a subset and is included in the available workforce statistics

### Average Age and Years on the Job

The average age and years on the job for the various occupational clusters indicate a mature, experienced, and diverse available workforce. A higher median age indicates that the older labor force is participating in work at a higher rate than younger workers. The non-worker available has a high average and median age (45 and 51) due primarily to retired non-workers not actively seeking but available for the right opportunity. The average age for the total available workforce is 39.2 while the median age is 45.

### Average Age by Occupational Clusters

Category	Avg. Age	Med. Age
Management	41.7	48
Production/Repair/Installation	40.0	45.5
Professional/Technical	36.8	41
Services	38.0	44
Non-Worker Available	45.2	51

The three oldest occupation groups are: Maintenance, Installations, and Repairs (Mechanic, Carpenter, Plumber, Electrician) etc.; Administrative Support: Shipping/Receiving, Secretaries, Computer Operators, etc.; and Government Office and Clerical Operations. The three youngest occupation groups are: Consumer Services Retail, Restaurant, Hotel, Food Services, etc.; Protective: Police/Fire/ Military/Regulators/investigators and Postal; and Production: Factory Assembly, Fabrication, Construction and Mining.

The top three occupation groups by most years on the job are: Maintenance, Installations, and Repairs (Mechanic, Carpenter, Plumber, Electrician) etc.; Administrative Support: Shipping/Receiving, Secretaries, Computer Operators, etc.; and Managerial, Executive, Business Owners, Farmers, Supervisory. The top three occupation groups by least years on the job are: Consumer Services Retail, Restaurant, Hotel, Food Services, etc.; Production: Factory Assembly, Fabrication, Construction and Mining; and Delivery/Drivers/Courier.

### Available Workforce Average Age and Years on Job

	Average Age	Years on Job
Administrative Support: Shipping/Receiving, Secretaries, Computer Operators, etc.	47.0	9.8
Business Office and Clerical Operations	36.5	4.7
Business Sales: Finance, Insurance, Real Estate, Wholesale, Industrial etc.	35.8	4.6
Computer Technology, Science, Math and Engineering	37.7	7.5
Consumer Services Retail, Restaurant, Hotel, Food Services, etc.	30.3	2.7
Delivery/Drivers/Courier	40.9	4.6
Government Office and Clerical Operations	42.8	5.4
Health, Social, Community, Personal Care, and Recreation Services	37.0	6.3
Maintenance, Installations, and Repairs (Mechanic, Carpenter, Plumber, Electrician) etc.	47.6	14.8
Managerial, Executive, Business Owners, Farmers, Supervisory	41.7	8.5
Other Blue Collar: Laborers, Farm Hand, Janitor, Warehouse Workers, etc.	39.9	6.8
Other White Collar Workers	38.6	6.2
Production: Factory Assembly, Fabrication, Construction and Mining	34.3	4.0
Professional: Doctors, Lawyers, Engineers, Accountants, Professors, Consultants, etc.	37.2	5.4
Protective: Police/Fire/ Military/Regulators/investigators and Postal	30.3	5.6
Teachers, Instructors, Trainers, Writers, Researchers, etc.	37.7	7.7

### Current and Previous/Other Work Experience

The following table shows the current work experience, second jobs, currently underutilized, and previously underutilized of the total worker available workforce. The table provides a perspective on the types of workers available for employment in the ALM. The first column in the table shows the number of workers available employed in the various occupational clusters.

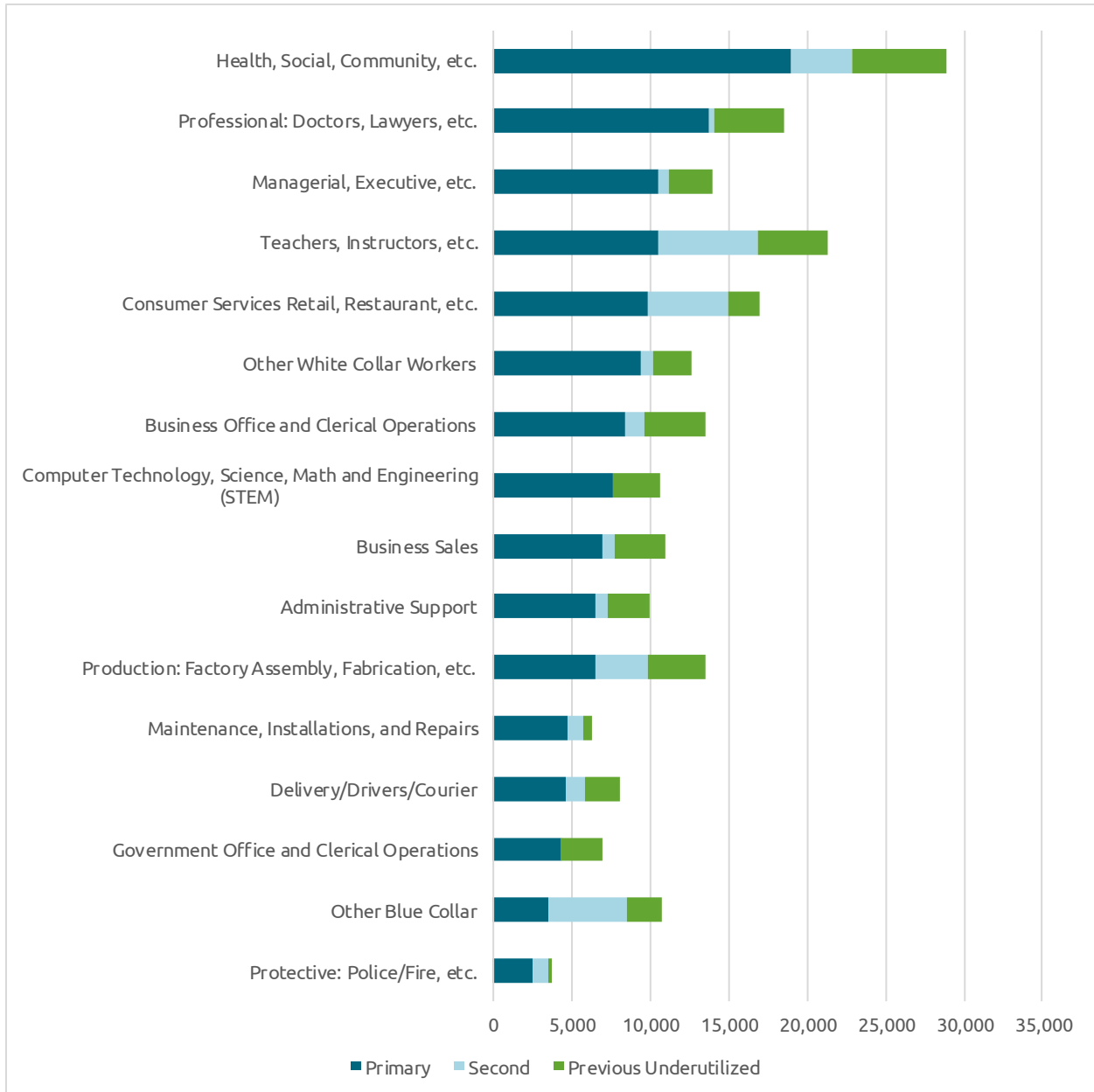
Respondents are indicating a high level of employment availability from the areas of Health, Social, Community, Personal Care, and Recreation Services; Professional: Doctors, Lawyers, Engineers, Accountants, Professors, Consultants, etc.; and Managerial, Executive, Business Owners, Farmers, Supervisory. However, the survey shows a workforce with skills, education, and experience available across the entire occupational classifications if the right employment opportunities are present.

24.5 percent also have second jobs. 81.2 percent of Protective: Police/Fire/ Military/Regulators/ investigators and Postal reported having a second job, along with 58.2 percent of Business Sales: Finance, Insurance, Real Estate, Wholesale, Industrial etc.. Over 60 percent of workers in both Government Office and Clerical Operations and Other Blue Collar: Laborers, Farm Hand, Janitor, Warehouse Workers, etc. are underutilized with 9 other occupation groups identifying themselves as highly underutilized or underemployed (>30%). The second job, current underutilized, and previous underutilized are all subsets of the worker available.

### Worker Available Work Experience

	Primary	Second	Current Underutilized	Previous Underutilized
Administrative Support: Shipping/Receiving, Secretaries, Computer Operators, etc.	6,510	757	2,691	3,175
Business Office and Clerical Operations	8,388	1,310	3,796	4,227
Business Sales: Finance, Insurance, Real Estate, Wholesale, Industrial etc.	7,003	773	3,227	2,379
Computer Technology, Science, Math and Engineering (STEM)	7,635		3,062	3,067
Consumer Services Retail, Restaurant, Hotel, Food Services, etc.	9,907	5,087	1,968	2,181
Delivery/Drivers/Courier	4,594	1,213	2,297	
Government Office and Clerical Operations	4,297	58	2,670	2,069
Health, Social, Community, Personal Care, and Recreation Services	19,032	3,870	6,032	5,277
Maintenance, Installations, and Repairs (Mechanic, Carpenter, Plumber, Electrician) etc.	4,760	952	578	4,268
Managerial, Executive, Business Owners, Farmers, Supervisory	10,570	608	2,826	3,957
Other Blue Collar: Laborers, Farm Hand, Janitor, Warehouse Workers, etc.	3,581	4,991	2,224	3,298
Other White Collar Workers	9,370	852	2,468	1,227
Production: Factory Assembly, Fabrication, Construction and Mining	6,481	3,435	3,586	2,253
Professional: Doctors, Lawyers, Engineers, Accountants, Professors, Consultants, etc.	13,752	369	4,377	3,371
Protective: Police/Fire/ Military/Regulators/investigators and Postal	2,559	937	293	2,173
Teachers, Instructors, Trainers, Writers, Researchers, etc.	10,490	6,370	4,475	2,935
<b>Worker Available</b>	<b>128,930</b>	<b>31,583</b>	<b>46,571</b>	<b>45,857</b>

## Worker Available Work Experience



The chart shows the same information as presented in the table on the previous page but in a graphical format and without the currently underutilized. The visual shows a good mix of current and related work experience and those who indicated availability and as currently employed. The Health, Social, Community, etc. occupation type shows opportunities with almost 29,000 identifying themselves as available.

## Student Debt

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

The data indicate that 57.7 percent of the 18-29 year-olds have student debt. This compares to 44.2 percent for the 30-54 year-olds and just 13.9 percent for the 55-64 year-olds.

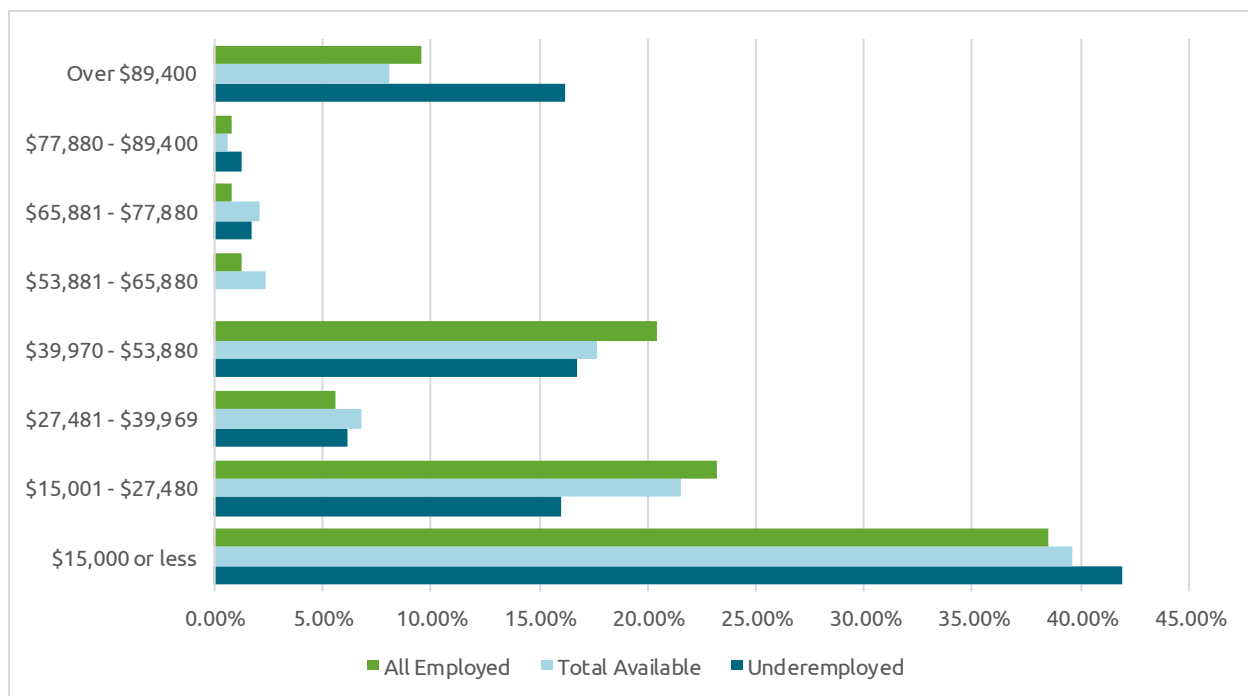
## Student Debt by Age Group

	18 - 29	30 - 54	55 - 64
Have Debt	<b>57.7%</b>	<b>44.2%</b>	<b>13.9%</b>
\$15,000 or less	50.2%	28.6%	35.0%
\$15,001 - \$27,480	22.7%	20.2%	21.3%
\$27,481 - \$39,969	3.3%	10.6%	7.6%
\$39,970 - \$53,880	16.4%	19.6%	13.6%
\$53,881 - \$65,880	0.6%	3.7%	7.5%
\$65,881 - \$77,880	0.0%	4.6%	0.0%
\$77,880 - \$89,400	0.0%	1.4%	0.0%
Over \$89,400	5.8%	9.7%	15.0%
No Response	1.0%	1.5%	0.0%

The debt amounts for the younger available workforce are skewed towards the lower end of the debt balance spectrum where the distribution of debt is wider for those in the middle age group. The 55-64 year-olds have minimal student debt and most of those reporting Over \$89,400 hold advanced degrees.

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

## Student Debt Current and Total Available Workforce



The chart represents the percentage of the various groups of underemployed, total available workforce, and all employed have in debt compared to each other.

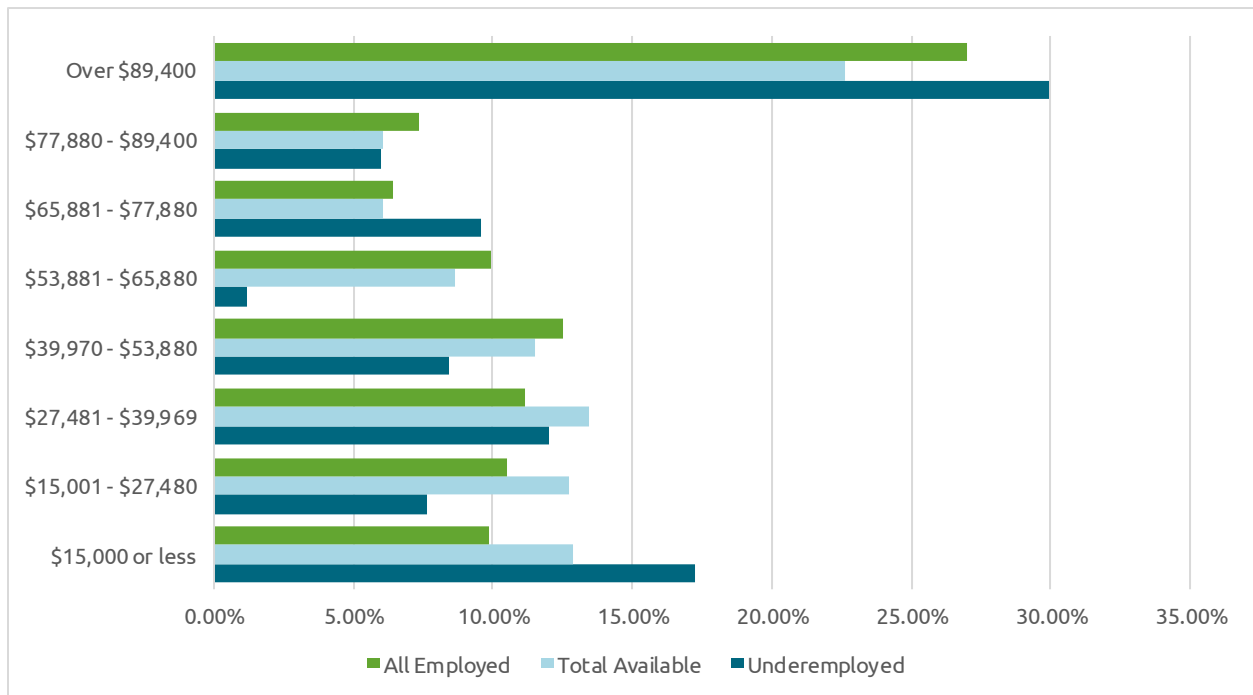
## Household Income

The household income clearly shows the younger 18-29 age group with 22.9 percent having household income of \$15,000 or less compared to the 30-54 age group's 6.6 percent and the 55-64 age group's 7.7 percent. For the 18-29 age group, 8.6 percent have a household income over \$89,400 compared to 29. percent of the 30-54 age group and 35.8 percent for the 55-64 age group.

## Household Income by Age Group

	18 - 29	30 - 54	55 - 64
\$15,000 or less	22.9%	6.6%	7.7%
\$15,001 - \$27,480	21.3%	8.9%	4.5%
\$27,481 - \$39,969	16.1%	13.9%	6.8%
\$39,970 - \$53,880	9.0%	13.0%	12.9%
\$53,881 - \$65,880	7.3%	8.9%	10.8%
\$65,881 - \$77,880	1.9%	8.3%	9.2%
\$77,880 - \$89,400	7.2%	6.6%	2.5%
Over \$89,400	8.6%	29.0%	35.8%
No Response	5.7%	4.7%	9.8%

## Household Income Current and Total Available Workforce



The chart represents the percentage of the various groups of underemployed, total available workforce, and all employed have in household income compared to each other.

## Worker Available Workforce

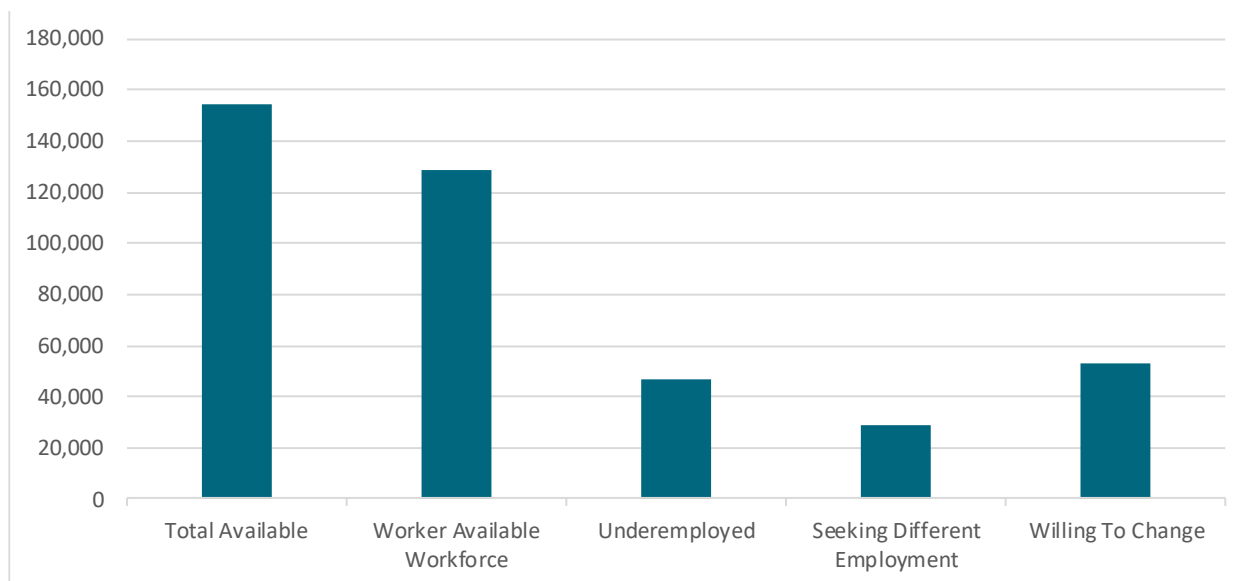
The willingness of the currently employed to change employment with the right opportunity is a key indicator in profiling the characteristics of the total available workforce in the Area Labor Market. The employed individuals who are willing or likely to change jobs with an existing or a different employer represent the primary pool of the total available workforce. The results of this workforce survey show that 84 percent of the respondents identified themselves as part of the total available workforce and were worker available at the time they were contacted with the other 16 percent as non-worker available.

## Worker Available Breakout

Category 18-64	Overall	Percent
<b>Total Available</b>	154,075	100.0%
<b><u>Worker Available Workforce</u></b>	<b>128,930</b>	<b>83.7%</b>
Underemployed	46,571	30.2%
Seeking Different Employment	29,051	18.9%
Willing To Change	53,307	34.6%

It is important to analyze each segment of respondents to identify and respect the differences and contributions to the ALM. Many factors must be considered when evaluating these workers, such as education, unused skills, wages and benefits desired, past experience, and the distance individuals are willing to travel to work. Within the worker available workforce are three subsets: those who classify themselves as underemployed, those actively seeking different employment, and those willing to change with the right opportunity. Respondents of these three subsets are counted only once as part of the worker available workforce.

## Worker Available Population



### Underemployed

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

The 46,571 in this group are included in the 128,930 members of the worker available workforce. By looking at the next two pages one can see some similarities with seeking and willing to change subset and the underemployed.

### Age and Gender

The average age of this group is 38 years of age. The respondents are distributed among all age ranges: 18 to 29 (36.7%), 30 to 54 (47.8%), and 55 to 64 (15.4%). Males and females represent 50.1 percent and 49.9 percent respectively.

### Education and Training

33 percent of the underemployed respondents in the ALM have some college or Associate's degree, 36 percent hold a Bachelor's degree, and the other 31 percent have an advanced degree. This compares to 84 percent of the total available workforce with post-high school education.

23.3 percent of the underemployed respondents stated that experience, training, and educational opportunities would be important in accepting a new job. Salary is the most important benefit for this group (77.9%) when considering new employment.

### Work Experience and Environment

To gain perspective on the types of workers available for new or different employment, survey respondents were asked to classify their occupations and industry experience as Goods Producing (manufacturing, construction mining or agriculture), Service Providing (retail, healthcare, etc.), or Government/Education. While the occupations may be similar in different industries, the focus of the work and work culture may be quite different in different types of industry. 49 percent of the underemployed are in the Service Producing sector.

## **Underemployed Workforce Characteristics**

Underemployed	46,571
Years on Job	6.3
Willing to Commute One Way	24.9
Current Average Wage	\$19.78
Desired Average Wage	\$26.11
Household Income	\$56,518
Average Age	38.5
Male/Female Ratio	50.1/49.9
Working a Second or Part Time Job	15.3%
Only Job Part Time or Temporary	4.1%
Employer Doesn't Provide Health Insurance	20.0%
Has No Health Insurance	16.5%
Has No Retirement Benefits	34.3%

## **Underemployed Education Attainment**

Less than high school	0.0%
High school or equivalent	0.0%
Some college or associate's degree	32.8%
Bachelor's degree	36.0%
Advanced degree	31.3%

## **Underemployed Primary Industry Sector/Past Employment**

Goods Producing	27.1%
Service Providing	49.1%
Government/Education	23.8%



### Seeking Different Employment

The subset of Seeking Different Employment is identified as those who are actively looking to change jobs but are still currently employed. The 29,051 in this group are included in the 128,930 worker available group and are not counted twice. By comparing the two different tables willing to change and seeking different employment, one can see some significant differences. The seeking different employment have fewer years on the job, lower current wages, lower household income, a higher percentage with no health insurance or retirement benefits, and lower levels of education.

#### Age and Gender

The average age of this group is 35 years of age. The respondents are distributed among all age ranges: 18 to 29 (51.6%), 30 to 54 (42.7%), and 55 to 64 (5.7%). Males and females represent 38.4 percent and 61.6 percent respectively.

#### Education and Training

39.1 of respondents only have a high school or equivalent degree. 30.0 percent of the Seeking Different Employment respondents in the ALM have some college or Associate's degree, 22.4 percent hold a Bachelor's degree, and the other 8.5 percent have an advanced degree. This compares to 84.1 percent of the total available workforce with post-high school education.

40.1 percent of the underemployed respondents stated that experience, training, and educational opportunities would be important in accepting a new job. Salary is the most important benefit for this group (74.1%) when considering new employment.

#### Work Experience and Environment

To gain perspective on the types of workers available for new or different employment, survey respondents were asked to classify their occupations and industry experience as Goods Producing (manufacturing, construction mining or agriculture), Service Providing (retail, healthcare, etc.), or Government/Education. While the occupations may be similar in different industries, the focus of the work and work culture may be quite different in different types of industry. 63 percent of the Seeking Different Employment are in the Service Producing sector.

### Seeking Workforce Characteristics

Seeking Workforce Characteristics	
Seeking Different Employment	29,051
Years on Job	5.6
Willing to Commute One Way	25.3
Current Average Wage	\$17.43
Desired Average Wage	\$20.24
Household Income	\$43,965
Average Age	34.5
Male/Female Ratio	38.4/61.6
Working a Second or Part Time Job	23.3%
Only Job Part Time or Temporary	8.9%
Employer Doesn't Provide Health Insurance	29.2%
No Health Insurance	24.2%
No Retirement Benefits	54.9%

### Seeking Education Attainment

Seeking Education Attainment	
Less than high school	0.0%
High school or equivalent	39.1%
Some college or associate's degree	30.0%
Bachelor's degree	22.4%
Advanced degree	8.5%

### Seeking Primary Industry Sector/Past Employment

Seeking Primary Industry Sector/Past Employment	
Goods Producing	17.3%
Service Providing	62.6%
Government/Education	20.0%

### Willing to Change

The Worker Available Workforce in the ALM is 128,930. Those Willing to Change for the right opportunity number 53,307. See the following table for more characteristics of this group.

### Age and Gender

The average age of this group is 40 years of age. The respondents are distributed among all age ranges: 18 to 29 (37.6%), 30 to 54 (40.3%), and 55 to 64 (22.1%). Males and females represent 59.2 percent and 40.8 percent respectively.

### Education and Training

14.1 of respondents only have a high school or equivalent degree. 29.1 percent of the Willing to Change respondents in the ALM have some college or Associate's degree, 34.8 percent hold a Bachelor's degree, and the other 22. percent have an advanced degree. This compares to 84.1 percent of the total available workforce with post-high school education.

16.5 percent of the Willing To Change respondents stated that experience, training, and educational opportunities would be important in accepting a new job. Salary is the most important benefit for this group (84.4%) when considering new employment.

### Work Experience and Environment

To gain perspective on the types of workers available for new or different employment, survey respondents were asked to classify their occupations and industry experience as Goods Producing (manufacturing, construction, mining, or agriculture), Service Providing (retail, healthcare, etc.), or Government/Education. While some occupations may be similar in different industries, the impact of the work and work culture is affected by the type of industry. 47 percent of the Willing To Change segment is in the Service Producing sector.

### **Willing to Change Workforce Characteristics**

	Overall
Willing to Change	53,307
Years on Job	6.9
Willing to Commute One Way	20.8
Current Average Wage	\$22.05
Desired Average Wage	\$25.62
Household Income	\$60,778
Average Age	39.6
Male/Female Ratio	59.2/40.8
Working a Second or Part Time Job	11.0%
Only Job Part Time or Temporary	7.7%
No Employer-Provided Health Insurance	17.9%
No Health Insurance	11.7%
No Retirement Benefits	25.1%

### **Willing to Change Education Attainment**

	Overall
Less than high school	0.0%
High school or equivalent	14.1%
Some college or associate's degree	29.1%
Bachelor's degree	34.8%
Advanced degree	22.0%

### **Willing to Change Primary Industry Sector/Past Employment**

Goods Producing	20.4%
Service Providing	46.6%
Government/Education	33.1%

## Non-Worker Available Workforce

Using only the unemployed persons as determined by the Bureau of Labor Statistics (BLS) would overlook sources of potential labor like homemakers and retirees who would be willing to enter or reenter the workforce if the right opportunity arose. GSG uses non-worker as part of its Area Labor Market (ALM) studies which includes three subsets: unemployed, homemaker, and retired in the non-worker segment.

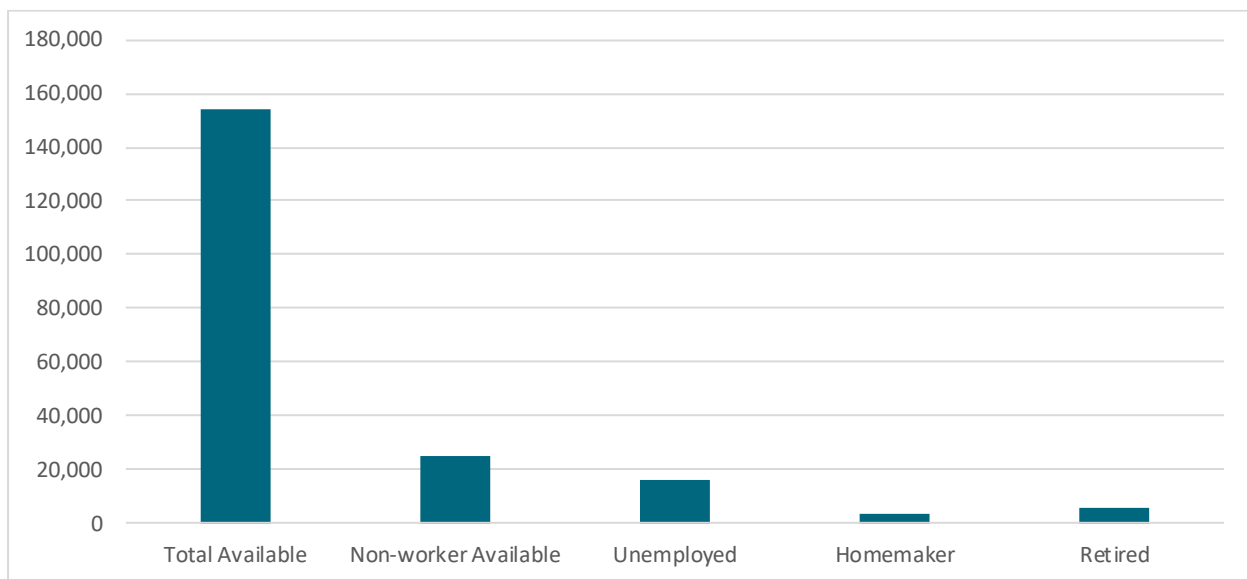
## Non-worker Breakout

Category 18-64	Overall	Percent
<b>Total Available*</b>	154,075	100.0%
<i>Non-worker Available (Willing To Work)</i>	<b>25,145</b>	<b>16.3%</b>
Unemployed	15,685	10.2%
Homemaker	3,588	2.3%
Retired	5,871	3.8%

Including these subsets in the analysis provides a more accurate assessment of the potential workforce in the ALM. Of the respondents interviewed, 16 percent stated they were non-working. By questioning these respondents about seeking employment or their willingness to accept an employment offer, the survey identified 25,145 in the unemployed, homemaker, and retired who stated they would accept with the right opportunity.

Analyzing the subsets provides unique characteristics for better understanding the available workforce. A further distinction in the non-working group of those actively seeking employment and those not actively seeking employment but willing to work or accept employment with the right opportunity includes wages, benefits, work culture, transportation, childcare, scheduling, etc.. The following sections provide a profile of the non-working unemployed, homemakers, and retired respondents.

## Non-worker Available Population



### Unemployed

Of those who responded who are unemployed, 93.3 percent are actively seeking employment. It is estimated that 1,043 are willing to return to work if presented with the right opportunity. The 15,685 represents both those seeking employment (14,642) and those willing with the right opportunity (1,043). The following table provides the general characteristics of this subdivision.

### Age and Gender

The average age of this group is 42.3 years of age. The respondents are distributed among all age ranges: 18 to 29 (23.1%), 30 to 54 (62.0%), and 55 to 64 (14.9%). Men make up 21.7 percent and females 78.3 percent seeking or willing to accept employment.

### Education and Training

69.3 percent of the unemployed respondents in the ALM have some post-high school education. In comparing the unemployed subset to other subsets, the unemployed tend to be some of the least educated with only 69.3 percent having some college compared to the total available workforce population at 84.1 percent.

### Reason Unemployed

Of those who identified themselves as unemployed (15,685), 14.9 percent stated that it was due to being terminated and another 24.1 percent cite disability. In reality many of those unemployed indicating availability would be less acceptable on the demand side of today's labor market than the other categories of the available workforce.

### Reason Can't Find Job

Of those responding about not finding a job, 51.1 percent state job availability. Transportation and child care combined to account for 24.2 percent and may be limiting factors for some potential workers.

### **Unemployed Workforce Characteristics**

Unemployed	15,685
Seeking Employment	14,642
Commute One Way	19.4
Desired Average Wage	\$17.59
Average Age	42.3
Male/Female Ratio	21.7/78.3
Household Income	\$33,978

### **Unemployed Education Attainment**

Less than high school	0.6%
High school or equivalent	30.1%
Some college or associate's degree	36.6%
Bachelor's degree	27.3%
Advanced degree	5.4%

### **Reason Unemployed**

Major Layoff or Plant Closing	16.8%
Fired/Released	14.9%
Never Employed	13.8%
Disabled	24.1%
Other Income	3.1%
No Response	27.5%

### **Reason Can't Find Job**

Job Availability	51.1%
Lacking Necessary Skills	6.6%
Compatibility/Personality	6.9%
Transportation	23.0%
Child Care	1.2%
Not Interested/Other	0.4%
No Response	10.8%

### Homemakers

Of those who responded as homemakers, it is estimated that 2,490 are willing to enter or return to work if presented with the right opportunity. This also includes those who are actively seeking employment. The following table provides the general characteristics of this subset.

### Age and Gender

The mean or average age of this group is 36 years of age compared with 39 years of age in the overall working group. The respondents are distributed among all age ranges: 18 to 29 (46.3%), 30 to 54 (43.5%), and 55 to 64 (10.1%). Men make up 16 percent and women 84 percent.

### Education and Training

79 percent of the homemaker respondents in the ALM have some post-high school education with 20 percent earning four-year degrees or higher.

Homemakers rated Experience, Training, and Educational opportunities 37.3% in terms of importance. Retirement is the most important benefit for this group (76.6%) when considering new employment.

### **Homemaker Workforce Characteristics**

Homemaker	3,588
Seeking Employment	2,490
Commute One Way	23.8
Desired Average Wage	\$15.50
Average Age	35.6
Male/Female Ratio	16.2/83.8
Household Income	\$29,897

### **Homemaker Education Attainment**

Less than high school	0.0%
High school or equivalent	21.1%
Some college or associate's degree	58.8%
Bachelor's degree	7.1%
Advanced degree	12.9%

### Retired

Of those who responded as being retired, it is estimated that 5,871 are willing to enter or return to work if presented with the right opportunity. This includes those who are actively seeking employment. The following table further segments the overall ALM into age, gender, and education areas.

### Age and Gender

The mean or average age of this group is 59 years of age compared with 39 years of age in the overall working group. The respondents are distributed among age ranges 30 to 54 (19.2%) and 55 to 64 (80.8%). Men make up 45 percent and women 55 percent.

### Education and Training

100 percent of retired respondents in the ALM have some post-high school education with 75 percent earning four-year degrees or higher. This group represents a significant pool of experienced and educated workers but also higher opportunity costs to get them back in the labor market.

Retirees rated Experience, Training, and Educational opportunities 18.4% in terms of importance. Health Care is the most important benefit for this group (68.0%) when considering new employment.

### **Retired Workforce Characteristics**

Retired	5,871
Seeking Employment	2,399
Commute One Way	27.4
Desired Average Wage	\$31.27
Average Age	59.0
Male/Female Ratio	45.5/54.5
Household Income	\$64,145

### **Retired Education Attainment**

Less than high school	0.0%
High school or equivalent	0.0%
Some college or associate's degree	25.1%
Bachelor's degree	52.1%
Advanced degree	22.8%

## Desired Wages and Benefits

Wages and benefits rank high among workers and non-workers in the total available workforce when making an opportunity assessment for potential employment. While wage and benefit costs are important for employers when assessing a workforce market, of equal or greater importance is the quality and availability of the necessary skills and talent of the labor force. The greater the quality and availability of the skills and talent for increased productivity, the more likely higher wages and benefits will follow. Competitiveness in the global economy means producing goods and services competitive in price and quality in the market place.

### Desired Benefits

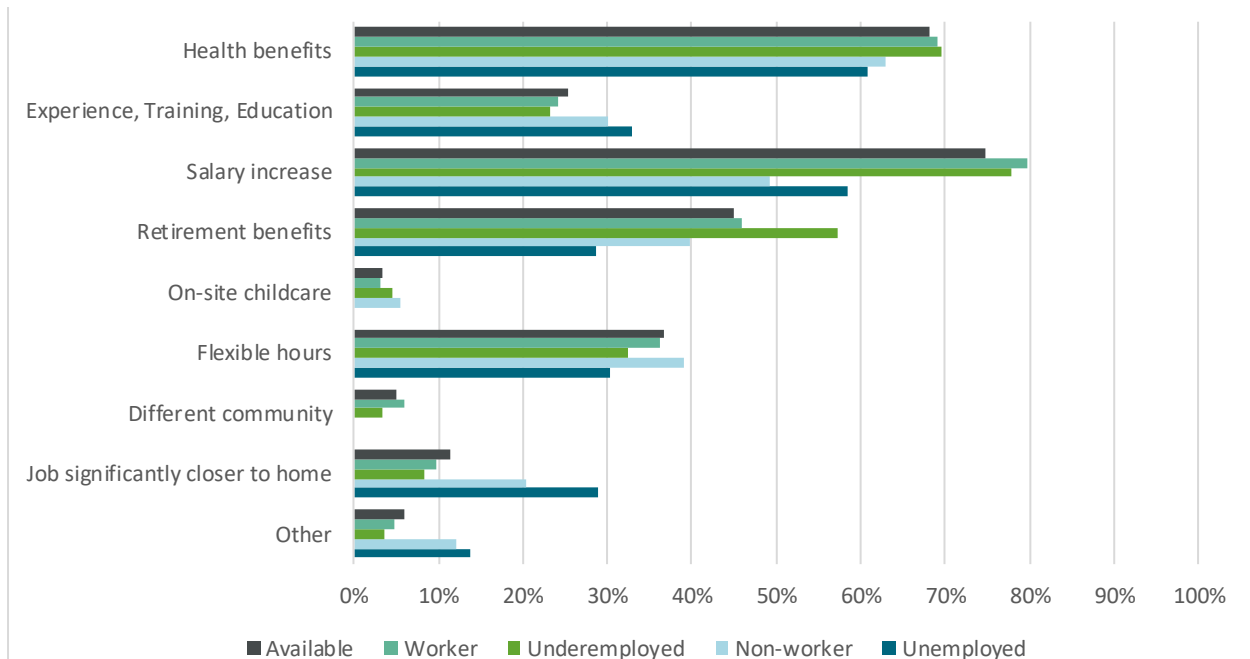
Salary Increase and Health Benefits appear to be the top motivators for changing jobs, with Retirement benefits and Flexible hours following. Salary Benefits rated higher for the worker available (80%) than the non-worker available (49%).

**Desired Benefits by Group**

Category	Available	Worker	Under-employed	Non-worker	Un-employed
Health Benefits	68%	69%	70%	63%	61%
Experience, Training, Education	25%	24%	23%	30%	33%
Salary Increase	75%	80%	78%	49%	58%
Retirement benefits	45%	46%	57%	40%	29%
On-site childcare	3%	3%	5%	5%	0%
Flexible hours	37%	36%	32%	39%	30%
Different community	5%	6%	3%	0%	0%
Job significantly closer to home	11%	10%	8%	20%	29%
Other	6%	5%	4%	12%	14%

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

**Available Workforce Desired Benefits**



## Desired Wage Rate Ranges

All wage and salary requirements expressed by respondents are presented in hourly rates. Appendix A presents an easy conversion table to annual, monthly, or weekly rates.

6.3 percent of the total available workforce would be interested in employment with a wage of up to \$9.99 per hour. It is estimated that 89,011 people or 57.8 percent of the total available workforce would be interested in a new or different employment with a wage of up to \$24.99. 18.2 percent would require \$35.00 or more for a new job opportunity. Those that currently hold jobs would require a higher desired wage than the non-worker in the available workforce.

## Available Workforce Desired Wage Rate Ranges

\$9.99 or Less	\$10.00 - \$10.99	\$11.00 - \$11.99	\$12.00 - \$12.99
6.3%	3.2%	1.2%	7.2%
\$13.00 - \$13.99	\$14.00 - \$15.99	\$16.00 - \$17.99	\$18.00 - \$19.99
2.4%	13.5%	6.9%	4.1%
\$20.00 - \$21.99	\$22.00 - \$24.99	\$25.00 - \$27.99	\$28.00 - \$30.99
9.0%	4.0%	11.8%	10.9%
\$31.00 - \$33.99	\$34.00 - \$36.99	\$37.00 - \$39.99	\$40.00 or more
1.2%	4.2%	2.0%	12.1%

By comparing the wage rate ranges by area labor market location and by worker and non-worker available workforce groups, the various preferences are more focused.

On November 6, 2018—after the survey period for this study—Missourians voted to raise the state’s minimum wage to \$12 an hour by 2023, a 52.9 percent increase over five years from the current \$7.85 minimum wage. This will compress the desired wage ranges presented in this study, as 10.7 percent of respondents indicated a desired wage that is lower than the new 2023 minimum. Members of the total available workforce in other desired wage ranges will also likely have higher desired wages in the future, relative to the scheduled increases to the state’s minimum wage.

## Desired Wage Rate by Available Workforce Group

Category	Overall		Worker		Non-Worker		Underemployed	
	Available Workforce	Percent	Available Workforce	Percent	Available Workforce	Percent	Available Workforce	Percent
\$9.99 or Less	9,740	<b>6.3%</b>	5,988	<b>4.6%</b>	3,676	<b>14.6%</b>	3,788	<b>8.1%</b>
\$10.00 - \$14.99	25,571	<b>16.6%</b>	15,814	<b>12.3%</b>	9,560	<b>38.0%</b>	3,152	<b>6.8%</b>
\$15.00 - \$19.99	33,578	<b>21.8%</b>	29,536	<b>22.9%</b>	4,093	<b>16.3%</b>	9,284	<b>19.9%</b>
\$20.00 - \$24.99	20,122	<b>13.1%</b>	17,882	<b>13.9%</b>	2,276	<b>9.1%</b>	7,879	<b>16.9%</b>
\$25.00 - \$29.99	18,906	<b>12.3%</b>	17,278	<b>13.4%</b>	1,679	<b>6.7%</b>	5,711	<b>12.3%</b>
\$30.00 - \$34.99	18,050	<b>11.7%</b>	17,127	<b>13.3%</b>	994	<b>4.0%</b>	6,729	<b>14.4%</b>
Over \$35.00	28,107	<b>18.2%</b>	25,304	<b>19.6%</b>	2,866	<b>11.4%</b>	10,028	<b>21.5%</b>
<b>Total:</b>	<b>154,075</b>	100.0%	<b>128,930</b>	100.0%	<b>25,145</b>	100.0%	<b>46,571</b>	100.0%



## Desired Wage Rate By Industry and Occupation

The Goods Producing industry sector has the highest desired wage of \$28.62 with the Services Providing industry sector having the lowest at \$21.81. The Management occupation group has the highest desired wage at \$39.33 and the Non-Worker group have the lowest at \$20.19.

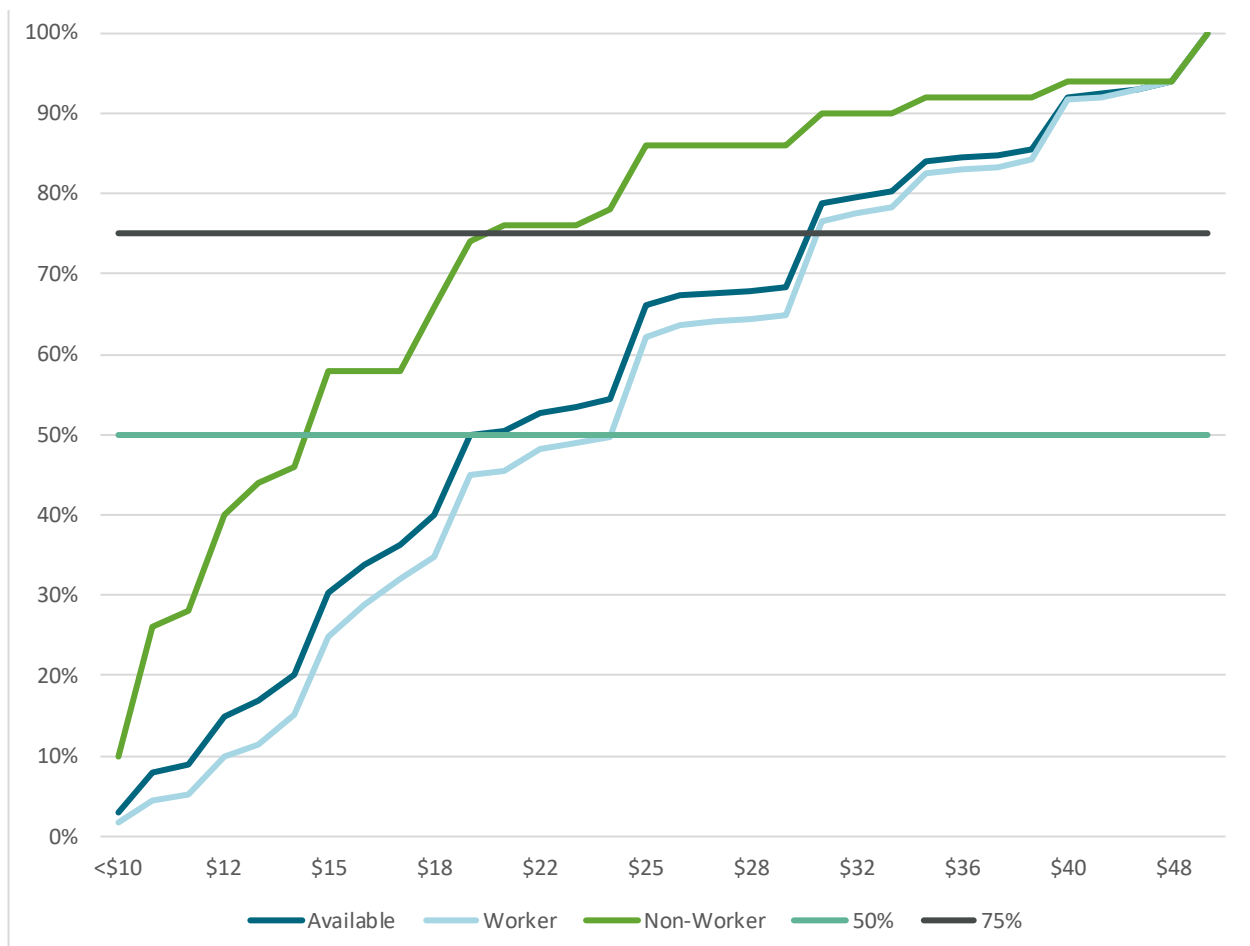
### Desired Wage Rate by Industry

Category	
Government / Education	\$26.29
Goods Producing	\$28.62
Service Providing	\$21.81

### Desired Wage Rate by Occupation

Management	\$39.33
Production/Repair/Installation	\$20.25
Professional/Technical	\$27.84
Services	\$20.81
Non-Working Available	\$20.19

### Desired Wage Rate by Percent of Available Workforce



The higher the level of desired wage, the higher the percentage of the population that would take that wage. About 50 percent of the population would be satisfied with \$20.00 an hour or less and about 75% of the population would be satisfied with \$30.00 an hour or less.

## Occupation Actual and Desired Wages

The following table provides a detailed analysis of the total available workforce by occupation, average actual wage, and average desired wage. Comparing the actual average wage with the desired wage shows the expectations of the worker available workforce in accepting a new job. The Production occupation clusters indicate the lowest desired wage increase (13.5%) compared to the worker available workforce (22.3%); those in the Professional occupation clusters have the highest desired wage increase (26.6%).

The three occupation groups: Computer Technology, Science, Math and Engineering; Professional: Doctors, Lawyers, Engineers, Accountants, Professors, Consultants, etc.; and Managerial, Executive, Business Owners, Farmers, Supervisory report the highest disparities (between \$6.19 and \$7.37) in their actual and desired wages. These groups are likely to be motivated by new opportunities with higher salaries.

### Occupation Actual and Desired Wages

	Available Workforce	Average Actual Wage	Average Desired Wage
<b>Management</b>	<b>10,570</b>	<b>\$33.15</b>	<b>\$39.33</b>
Managerial, Executive, Business Owners, Farmers, Supervisory	10,570	\$33.15	\$39.33
<b>Production/Repair/Installation</b>	<b>11,241</b>	<b>\$17.84</b>	<b>\$20.25</b>
Maintenance, Installations, and Repairs, etc.	4,760	\$24.14	\$26.32
Production: Factory Assembly, Fabrication, Construction and Mining	6,481	\$14.31	\$17.55
<b>Professional/Technical</b>	<b>41,440</b>	<b>\$22.00</b>	<b>\$27.84</b>
Business Sales: Finance, Insurance, Real Estate, Wholesale, Industrial, etc.	7,003	\$19.57	\$23.71
Professionals: Doctors, Lawyers, Engineers, Accountants, Professors, etc.	13,752	\$25.93	\$32.36
Computer Technology, Science, Math, and Engineering	7,635	\$24.70	\$32.07
Protective: Police/Fire/Military/Regulators/Investigators and Postal	2,559	\$11.54	\$15.07
Teachers, Instructors, Trainers, Writers, Researchers, etc.	10,490	\$18.83	\$23.71
<b>Services</b>	<b>65,679</b>	<b>\$17.55</b>	<b>\$20.81</b>
Administrative Support: Shipping/Receiving, Secretaries, Computer Operators, etc.	6,510	\$17.49	\$20.36
Business Office and Clerical Operations	8,388	\$18.23	\$20.54
Consumer Services Retail, Restaurant, Hotel, Food Services, etc.	9,907	\$11.26	\$15.04
Delivery/Drivers/Courier	4,594	\$18.57	\$20.36
Government Office and Clerical Operations	4,297	\$18.40	\$19.69
Health, Social, Community, Personal Care, and Recreation Services	19,032	\$18.34	\$21.86
Other Blue Collar: Laborers, Farm Hand, Janitor, Warehouse Workers, etc.	3,581	\$13.52	\$18.09
Other White Collar Workers	9,370	\$23.26	\$26.69
<b>Non-Worker Available</b>	<b>25,145</b>	<b>N/A</b>	<b>\$20.19</b>
Homemaker	3,588	N/A	\$15.50
Retired	5,871	N/A	\$31.27
Unemployed	15,685	N/A	\$17.59

Adjustments have been made to reflect anomalies in the survey data

## Commuting Patterns and Preferences

The preferred commute of the worker available workforce in the Area Labor Market ALM is 23.3 minutes/miles one way. The overall commute preference of the total available workforce is 23.0 minutes/miles one way. The total available workforce indicates it is open to commuting for the right employment opportunity. The table shows 129,133 people or 83.8% percent of the total available workforce would commute more than 10 minutes/miles, one way, for work. It also shows that 37,393 people or 24.3% percent of the total available workforce are willing to travel more than 30 minutes/miles and 6,775 people, 4.4% percent, will commute more than 50 minutes/miles.

### Willingness To Commute By Available Workforce Groups

Where individuals live within the ALM will influence their desire to commute to work. The transportation routes and options to employment centers also have a big influence where people work. The community/city may be the largest economic center for many of the smaller communities in the area. Individuals from the surrounding communities seeking job opportunities and competitive wages/benefits may be accepting of the fact that they will have to commute some distance to a new employer.

The table to the right illustrates the different commuting preferences of those who are employed and those who are non-employed. Those who are employed show a willingness to commute 23 minutes/miles one way to work. The three groups in the non-working group show a lower willingness to travel, approximately 22 minutes/miles on average.

The non-working groups prefer a shorter commute but also are more open to part-time and more flexible work arrangements. In general, retired people are not as willing to commute long distances to work; however, those in the ALM are willing to travel 27 minutes/miles one way for the right employment opportunities.

#### Preferred Distance/Travel Time

Less than 10 miles	24,591
10 - 30 miles	91,740
31 - 50 miles	30,619
51+ miles	6,775

#### Available Workforce Group Preferred Distance/Travel Time

Total Available Workforce	<b>23.0</b>
Worker Available Workforce	<b>23.3</b>
Underemployed	24.9
Seeking Different Employment	25.3
Willing To Change	20.8
Non-Worker Available Workforce	<b>21.9</b>
Unemployed	19.4
Homemaker	23.8
Retired	27.4

## Willingness to Commute By Occupation and Industry

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

There are three broad categories of interest when working: people, data, and things. Most people have preference for one, but most are adaptable to all three. A primary interest in one of the three may be an indicator of success in certain occupations. A stronger interest in people may lead to occupations in management and services. An interest in working with things may point to occupations in Production. Professional/Technical may require a stronger interest in data and analytical skills. The survey results for the ALM showed interest in People with 59.3 percent, Data with 21.2 percent, and Things with 19.5 percent.

## Changing Primary Employment Field

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

The following table shows the percentage of those in the various available workforce groups willing to change their primary employment field.

### Commuting by Occupation Group

	Minutes/ Miles
Management	24.3
Production/Repair/Installation	26.9
Professional/Technical	20.4
Services	24.3
Non-Working Available Workforce	21.9
Overall Average	<b>23.0</b>

### Commuting by Industry Type

	Minutes/ Miles
Goods Producing	27.3
Government/Education	24.1
Service Providing	21.1

### Willing To Change Primary Occupation

	Available Workforce	Willing To Change	Percent
Worker Available	<b>128,930</b>	<b>106,523</b>	<b>82.6%</b>
Underemployed	46,571	41,851	89.9%
Seeking Different Employment	29,051	26,253	90.4%
Willing To Change	53,307	38,419	72.1%
Non-Worker Available	<b>25,145</b>	<b>23,380</b>	<b>93.0%</b>
Unemployed	15,685	13,966	89.0%
Homemaker	3,588	3,588	100.0%
Retired	5,871	5,826	99.2%

### Willing To Change Primary Industry Group

	Available Workforce	Willing To Change	Percent
Worker Available	<b>128,930</b>	<b>108,625</b>	<b>84.3%</b>
Underemployed	46,571	37,860	81.3%
Seeking Different Employment	29,051	26,864	92.5%
Willing To Change	53,307	43,901	82.4%
Non-Worker Available	<b>25,145</b>	<b>23,283</b>	<b>92.6%</b>
Unemployed	15,685	13,869	88.4%
Homemaker	3,588	3,588	100.0%
Retired	5,871	5,826	99.2%

## Conclusion

This study assesses the supply side of labor and provides information for the Moberly Area Labor Market about commuting patterns, current and desired wages, worker occupation and industry, experience, and education. The total available workforce is determined from the workers and non-workers perspective and provides information for the supply side of labor markets. The demand side is determined from the employer's perspective and provides information about the skills, quality, and availability of the labor force.

While considerable information is available surrounding workforce issues at the national and state levels, less information is available at the local and regional levels, resulting in inadequate data to make objective decisions. While employers are concerned about over-employment and workers with deficient skills and who are under-qualified, the worker and community are concerned about underemployment and workers who have excess skills who are over-qualified for those jobs and presents opportunities for expansion and new investments. Although the dynamics of the workplace will not change dramatically, employers will continue to recruit the best employees with the best skills for the best value and workers will continue to seek the best jobs with the best compensation package and work environment. The balance for a competitive workforce is critical with the employer, community, education, and worker all having a major stake in developing a skilled and productive workforce with a goal of a just-in-time skill and talent pool to meet the demand.

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

## Appendices

## Appendix A-Wage and Salary Conversion Rates

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

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

## Appendix B-Methodology

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

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

The key advantage of an Area Labor Market (ALM) analysis is that it expands the pool of potential workers by including workers excluded from the Civilian Labor force (CLF). It also allows researchers to examine those individual members of the ALM pool who have a propensity to consider a job opportunity given their employment expectations. Employers evaluating the labor component are also more likely interested in the population age segment 18-64 than in the CLF representing *the civilian non-institutional population, 16 years of age and over classified as employed or unemployed*. Even with those restrictions, employers should note that, in practice, not all members of the *available labor* would apply for a new job opportunity. The reader is further cautioned that, while the number of workers identified as available with their skills, experience, education, and costs as accurate, all of those individuals may not be acceptable candidates for an employer. Their previous work records, stability, integrity, intelligence, appearance, and other factors are not considered in this report.

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

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

A random household telephone survey and targeted social media surveys have been ways for collecting data within the Area Labor Market. The survey is designed by Growth Services and conducted by call center or social media research firms. The overall goal of the process is to collect a sufficient number of valid surveys completed by respondents 18 to 64 years of age. Validity of a sufficient number of survey results to a confidence of +/-5 percent is necessary with query or drill down validity of +/-10-15 percent. To ensure that an even distribution of respondents is achieved, a proportional number of completions are conducted by county population, age segments, and gender. It is important to note that the projected results are based on a relatively small sample size.



The survey is designed and developed by The Growth Services Group (GSG) and approved by the client, employers, or Economic Development organization.

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

Respondents in the 18-64 year age range self-identifying themselves as working, unemployed, homemaker, retired, military or student are asked a series of questions to determine what job characteristics and benefits were most important for them when considering employment, the reasons for unemployment, and how far they would be willing to travel to accept employment. Information on previous employers and skills was also gathered for these sectors. The employer type grouped employers into three main categories by *Goods Producing*, *Service Providing*, and *Government/Education*. This allows employers evaluating the labor to view occupations from a work culture perspective as well as skills and experience. Once completed, the results of the survey are compiled and queried or cross-tabulated to determine the relationship between the variables of key interest areas, various internal geographic areas or laborsheds, and the entire surveyed ALM. Documenting and analyzing the ALM survey results by area and characteristics, provides new insight into the area's *available labor* that is currently unavailable in any other form.

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

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

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