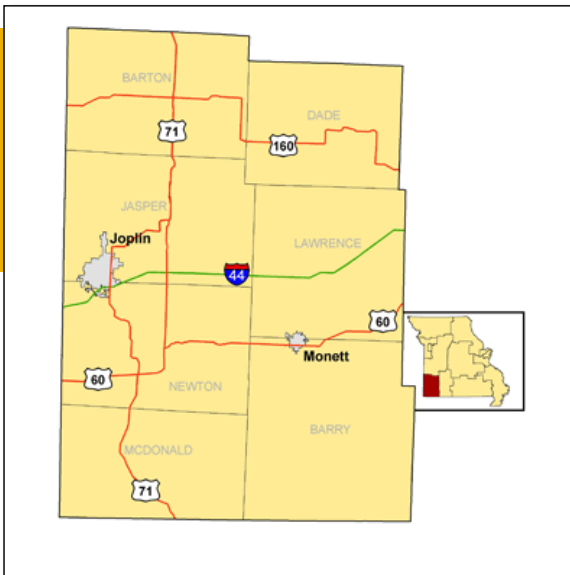


Southwest Region Labor Market Analysis



The Southwest Region is situated in the southwest corner of the State of Missouri. Counties included in the Central Region are: Barry, Barton, Dade, Jasper, Lawrence, McDonald and Newton.

This region includes several major cities such as Joplin and Monett. Many of Missouri’s major highways cross through this region. Interstate 44 runs through the center of the region. In addition, Highway 60, Highway 160 and Highway 71 cross

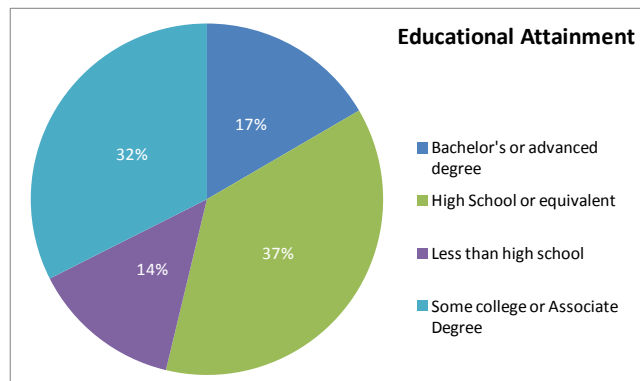
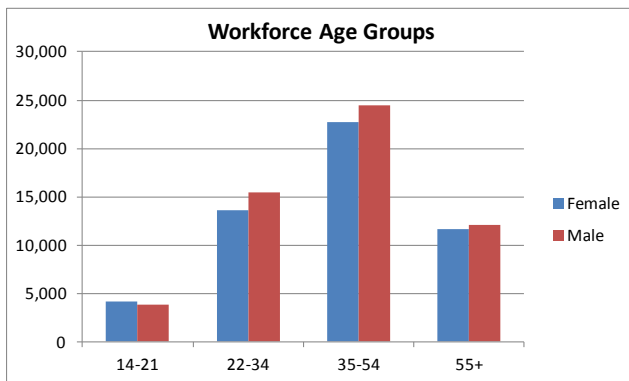
through the region, allowing a great deal of travel through the area. This region shares a border with 3 states – Arkansas, Oklahoma and Kansas.

Workforce

The total population of the Missouri workforce is 2,671,013, and the Southwest Region is home to 107,908, or 4%, of the state’s workforce. The age group for workforce is defined as 14 years or more. The county with the largest population is Jasper County with 52,519, followed by Newton County with 21,306.

The population of the workforce is aging. In the Southwest Region, 22.01% of the workforce is age 55 or older. The percentage for the state is slightly lower, with an average of 21.44% for the same age group.

The education attainment rate for the Southwest Region is lower than the average for Missouri. In the Southwest Region, 86% of the workforce has a high school diploma or higher, compared to 88% for the state. The number of those who have not obtained a high school diploma is 14% in the Southwest Region and 12% statewide.



Source: MERIC WIA County Demographics compiled from LEHD data (missourieconomy.org/regional/index.stm)

Missouri Labor Supply & Demand

The Missouri Labor Supply & Demand Analysis Report, published March 2015, takes job seeker information from people who registered with jobs.mo.gov during 2014 and it compares to employer job ads during the same time period. *Business and Sales* and *Healthcare* have the highest gaps, while *Management and Support* and *Production* have the largest surplus of workforce.

SW WIA	Total	Business & Sales	Health Care & Related	Transportation	Science & Technology	Other Services	Food Service	CIMR*	Management & Support	Production
# Job Ads	12,092	2,425	1,985	2,039	761	669	734	1,047	1,935	497
% Job Ads	100.0%	20.1%	16.4%	16.9%	6.3%	5.5%	6.1%	8.7%	16.0%	4.1%
# Jobseekers	9,116	908	662	777	244	517	626	1,396	2,533	1,452
% Jobs Sought	100.0%	10.0%	7.3%	8.5%	2.7%	5.7%	6.9%	15.3%	27.8%	15.9%
Gap	--	10.1%	9.1%	8.3%	3.6%	-0.1%	-0.8%	-6.7%	-11.8%	-11.8%

*CIMR = Construction, Installation, Maintenance & Repair

Source: Missouri Labor Market Supply & Demand Analysis, March 2015

Commuting Patterns

Commuting patterns tell us a great deal about a region. In the Southwest Region, a majority of the workforce commutes to a different county to work. In fact, over half the workforce in 6 of the 7 counties in the region leave the county where they live for employment. In contrast, only 27.5% of the workforce leaves the Southwest Region for employment. From these facts, we can conclude that most persons commute to a different county within the Southwest Region for employment. In addition, we can also infer that persons living in the Southwest Region are skilled in the industries and occupations in demand in this region.

Percent of Employees Working Outside of Home County			
Barry	55.9%	Lawrence	62.8%
Barton	63.5%	McDonald	69.1%
Dade	70.7%	Newton	68.4%
Jasper	30.9%		

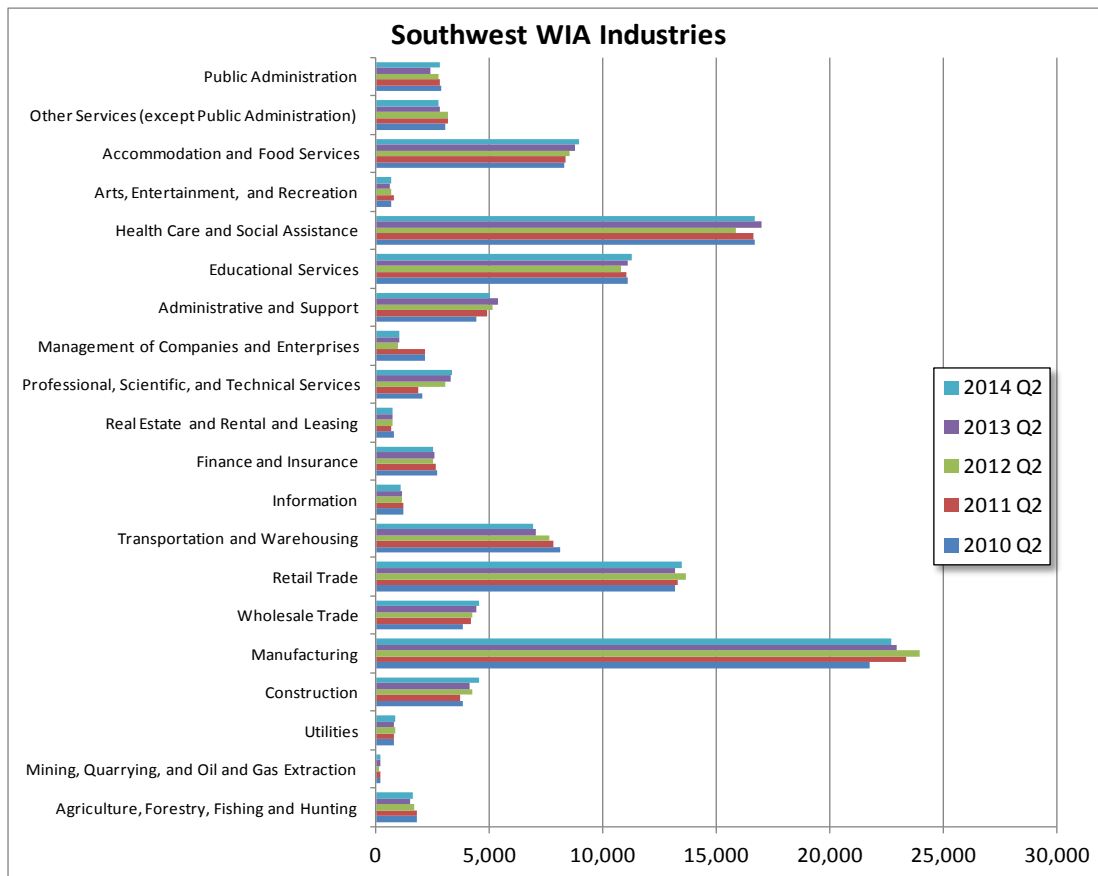
Source: US Census Bureau, Center for Economic Studies, LEHD, On the Map (onthemap.ces.census.gov)

Industries

The chart illustrates changes in employment in the Southwest Region by industry during the 5 year period. Industries employing the most people at the end of the second quarter of 2014 (most recent data available) are *Manufacturing; Health Care and Social Assistance; and Retail Trade*. Employment in these three industries equals 47% of the total employment in the region.

About half of the industries experienced overall employment growth over the last 5 years. The highest levels of employment growth are seen in the industries of *Professional, Scientific, and Technical Services; Manufacturing; and Construction*. Some industries saw decreasing employment numbers during the same 5 year period. *Transportation and Warehousing and Management of Companies and Enterprises* are the industries with the highest employment decreases.

The largest employers in the Southwest Region are in a variety of industries, including technology companies such as **Jack Henry & Associates**; health care with **Mercy Hospital Joplin, Freeman Health System** and **Ggnsc Anderson LLC**; food processing operations such as **Tyson Foods, Simmons Foods, Inc., Butterball, LLC** and **George's, Inc.**; manufacturers such as **Leggett & Platt, Inc., Eaglepicher Technologies, EFCO, LZB Manufacturing** and **Jasper Products, LLC**; transportation (trucking) with **Con-Way Truckload, Inc.**; and administrative and support services such as **NCO Financial Systems, Inc./APAC Customer Services**, both an EGS Company.



Source: US Census Bureau, QWI Explorer Application (qwexplorer.ces.census.gov)

Occupations

In *The ABCs of Missouri Career Grades 2012-2022*, letter grades are assigned to 800+ occupations based on the total job openings and average wage of the occupation. Job openings include both new growth (jobs added to the workforce) and replacements (vacancies created by employees moving to a different occupation or retiring). Projections are made for each occupation on a statewide basis as well as each of the regions. Therefore, a job may be graded differently in the statewide projections and each region based on the openings and wages for specific areas of the state.

In the Central Region, approximately 38,000 job openings are projected between 2012 through 2022. Most of the job openings, over 18,000 are projected in the Grade B category. Many of the job openings are in entry level occupations, such as *Retail Salespersons; Cashiers; Food Preparation and Serving Workers; Laborers; Customer Service Representatives; Waiters and Waitresses and Office Clerks.*

Each occupation is also classified in the Now, Next and Later categories. A “Now” job would require short- to moderate-term on-the-job training lasting no more than 12 months. “Next” occupations generally require an Associate’s degree or substantial vocational training lasting more than one year. “Later” occupations usually require a bachelor’s or advanced degree and in addition to specific work experience.

Southwest WIA - Good Outlook Careers				
	Title	Grade	Openings	Average Wage
N O W	Retail Salespersons	B	1,526	\$23,024
	Cashiers	C+	1,495	\$18,646
	Combined Food Preparation & Serving Workers, Including Fast Food	B	1,396	\$17,710
	Laborers & Freight, Stock & Material Movers	B+	975	\$22,271
	Customer Service Representatives	A	914	\$25,604
	Waiters and Waitresses	C+	857	\$18,676
	Office Clerks, General	B	768	\$25,377
N E X T	Heavy and Tractor-Trailer Truck Drivers	A	1,547	\$45,457
	Registered Nurse	A	778	\$45,343
	Nursing Assistant	B	391	\$21,033
	First-Line Supervisors of Retail Sales Workers	B	388	\$35,659
	Teacher Assistants	B	300	\$19,930
	Maintenance and Repair Workers, General	B	296	\$30,218
	First-Line Supervisors of Office and Administrative Support Workers	A	287	\$41,621
L A T E R	General and Operations Managers	A+	512	\$ 69,637
	Elementary School Teachers, Except Special Education	B+	452	\$ 41,499
	Substitute Teachers	C+	249	\$ 22,226
	Accountants & Auditors	A	233	\$ 52,464
	Secondary School Teachers, Except Special & Career/Technical Ed.	B	211	\$ 43,947
	Farmers, Ranchers and other Agricultural Managers	B+	195	n/a
	Middle School Teachers, Except Special & Career/Technical Ed.	B	170	\$ 41,935

Source: *The ABCs of Missouri Career Grades 2012-2022*, Southwest Region

MERIC also prepares a document listing the top 20 occupations based on the number of job openings for each region, and the *Southwest Region Top Openings* is attached.

Another source for identifying in-demand occupations is through real-time data. A tool called Burning Glass compiles information from job postings on over 38,000 sites into a database that can be queried to find information on jobs. This information provides insight on the jobs employers are currently hiring, occupations that are in-demand and skills that employers require for employees.

The Missouri Real-Time Labor Market Summary compiles information queried through Burning Glass. Briefs are published for the State of Missouri, and for each region. Since the brief is published every other month, the information is always current. The most recent publication is attached to this summary.

Below is a list of the top 25 occupations posted in job ads by employers in the Southwest Missouri Region in calendar year 2014.

Burning Glass - Top Job Postings in 2014	
Occupation	Job Postings
*+Heavy and Tractor-Trailer Truck Drivers	1,372
*+Retail Salespersons	652
Sales Representatives, Wholesale and Manufacturing	474
*+Customer Service Representatives	326
*+First-Line Supervisors of Retail Sales Workers	309
*+Laborers and Freight, Stock, and Material Movers, Hand	295
*+Combined Food Preparation and Serving Workers, Including Fast Food	276
*+Registered Nurses	263
Light Truck or Delivery Services Drivers	229
First-Line Supervisors of Food Preparation and Serving Workers	226
+Maintenance and Repair Workers, General	214
Merchandise Displayers and Window Trimmers	185
*+Cashiers	179
*Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	129
*+Nursing Assistants	124
Childcare Workers	120
Computer User Support Specialists	111
Licensed Practical and Licensed Vocational Nurses	108
First-Line Supervisors of Production and Operating Workers	106
*Janitors and Cleaners, Except Maids and Housekeeping Cleaners	103
*Personal Care Aides	99
*+Office Clerks, General	88
Human Resources Specialists	85
Software Developers, Applications	84
Insurance Sales Agents	80

Source: Labor Insight/Burning Glass Occupation Data

*Occupation on projected top 20 Central Region Top Openings list

+Occupation listed as Central Region Good Outlook Career in Career Grades

Within the sources of information for employment projections and in real-time data in job ads, we see many of the occupation titles repeated, especially in the Now and Next categories. Reviewing the data found in multiple sources helps to validate the need for these occupations.

March 2015