

The Greater St. Louis Metropolitan WIOA Regional Plan

Program Years 2020-2024

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 bi-monthly 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 2017 the Committee also agreed to elect a Chair and Vice-Chair 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:

Business Service Strategy

The Business Teams from each area meet regularly at the Directors' Consortium meetings 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 Teams in the Region also work with the State's Employment Transition Team to coordinate State Business services with local Job Center services.

The Business Team works with the St. Louis Regional Chamber 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.

Referrals of Jobseekers between areas

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 DWD 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 committed to Advanced Manufacturing and Healthcare sector initiatives.

However, the Directors’ Consortium, along with area economic developers, local governments, education entities and area businesses have begun focusing efforts to grow a strategic sector focused on geospatial data analysis due to the upcoming opening of the National Geospatial-Intelligence Agency (NGA). The NGA alone will bring 3,000 plus jobs to the Region. Officials are hopeful this will draw even more private investment to support the agency’s information technology focus

Therefore, the LWDAs of the St. Louis Region agree to add the Information Technology (IT) sector to its list of sector initiatives. Possible IT sector activities are in the discussion phase to determine the best strategies to prepare and skill up the regional workforce.

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 attachments.

See Attachment 2 Greater St. Louis Employment Summary from Alliance STL prepared 11/27/19

See Attachment 3 Missouri Workforce 2019 St. Louis Region from Sept of Higher Education & Workforce Development

See Attachment 4 2019 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.

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 Alliance STL of the St. Louis Regional Chamber, 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 insure 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

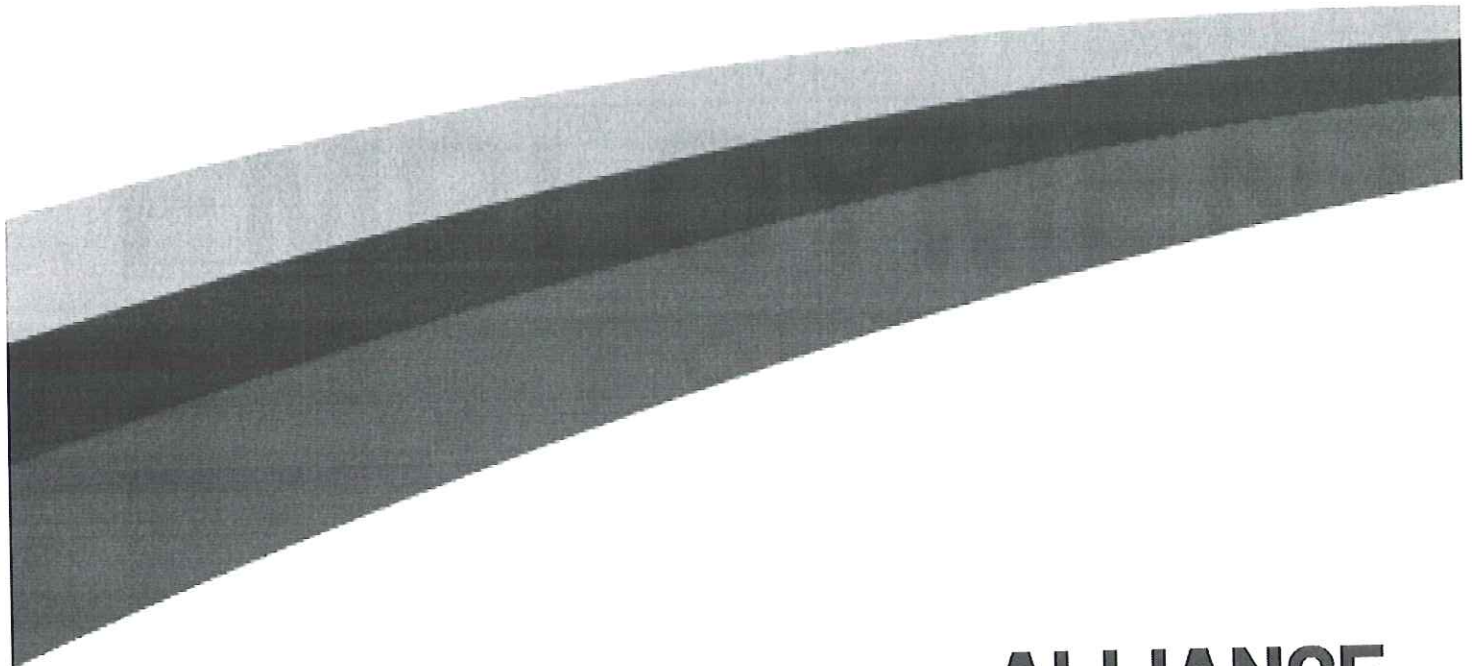
The six individual WIOA local regions that make up the St. Louis Metropolitan Region agree to the following service strategies:

- 1) Maintain a 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, through the CICs, 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.

GREATER ST. LOUIS **EMPLOYMENT** SUMMARY

October 2019 Preliminary Data



OVERVIEW

The nation's seasonally adjusted unemployment rate was 3.6 percent in October 2019, up from 3.5 percent in September. The St. Louis MSA's seasonally adjusted unemployment rate was 3.1 percent, unchanged from September. The region's unemployment rate remains lower than the national rate this month.

Nationally, preliminary seasonally adjusted nonfarm employment numbers for October payroll employment rose by 128,000 jobs over-the-month for an increase of 0.1 percent. The region's seasonally adjusted payroll decreased by 1,900 jobs, for a percent change of -0.1 percent.

The region's not seasonally adjusted payroll employment data series showed growth over the year. Employment in the region rose by over 23,400 jobs from October 2018 to October 2019, for a 1.7 percent increase. The region outpaced the national employment pace of growth 1.4 percent. The construction, trade, transportation, and utilities, information, financial activities, leisure and hospitality, and government sectors outpaced the nation's rate of job growth this month.

This summary is available on the Economic Overview page of the St. Louis Regional Chamber website <http://www.stlregionalchamber.com>. Please note the next summary will be released on January 3, 2020.

Please note that the preliminary data presented in this summary is subject to change. One month's data does not necessarily indicate a trend. Refer to page 4 to see long-term unemployment trends and page 7 to see nonfarm employment trends since 1994.

Unemployment Rate | PEOPLE Seasonally adjusted

	October 2019		September 2019		August 2019
St. Louis MSA	3.1%	--	3.1%	★	3.3%
Illinois	3.9%	--	3.9%	★	4.0%
Missouri	3.1%	--	3.1%	★	3.2%
United States	3.6%	★	3.5%	★	3.7%

Source: U.S. Bureau of Labor Statistics¹

Payroll Employment | JOBS Seasonally adjusted

	October 2019	Job Change Over-the-Month	Percent Change Over-the-Month	
St. Louis MSA	1,409,800	(1,900)	-0.1%	★
Illinois	6,192,300	1,900	0.0%	--
Missouri	2,923,500	(700)	0.0%	--
United States	151,945,000	128,000	0.1%	★

Source: U.S. Bureau of Labor Statistics²

Labor Force & Unemployment Rates | PEOPLE

ST. LOUIS, MO-IL MSA LABOR FORCE

Not seasonally adjusted

	MONTHLY			ANNUAL AVERAGE		
	October 2019 (P)	October 2018	Percent Change	2018	2017	Percent Change
Total Civilian Labor Force	1,501,055	1,455,409	3.1%	1,459,244	1,460,347	-0.1%
Total Employed	1,460,178	1,414,211	3.3%	1,409,294	1,405,014	0.3%
Total Unemployed	40,877	41,198	-0.8%	49,950	55,333	-9.7%
Unemployment Rate	2.7%	2.8%	--	3.4%	3.8%	--

Source: U.S. Bureau of Labor Statistics³

UNITED STATES LABOR FORCE

Not seasonally adjusted

	MONTHLY			ANNUAL AVERAGE		
	October 2019 (P)	October 2018	Percent Change	2018	2017	Percent Change
Total Civilian Labor Force	164,576,000	162,723,000	1.1%	162,075,000	160,320,000	01.1%
Total Employed	159,067,000	156,952,000	1.3%	155,761,000	153,337,000	1.6%
Total Unemployed	5,510,000	5,771,000	-4.5%	6,314,000	6,983,000	-9.6%
Unemployment Rate	3.3%	3.5%	--	3.9%	4.4%	--

Snapshot

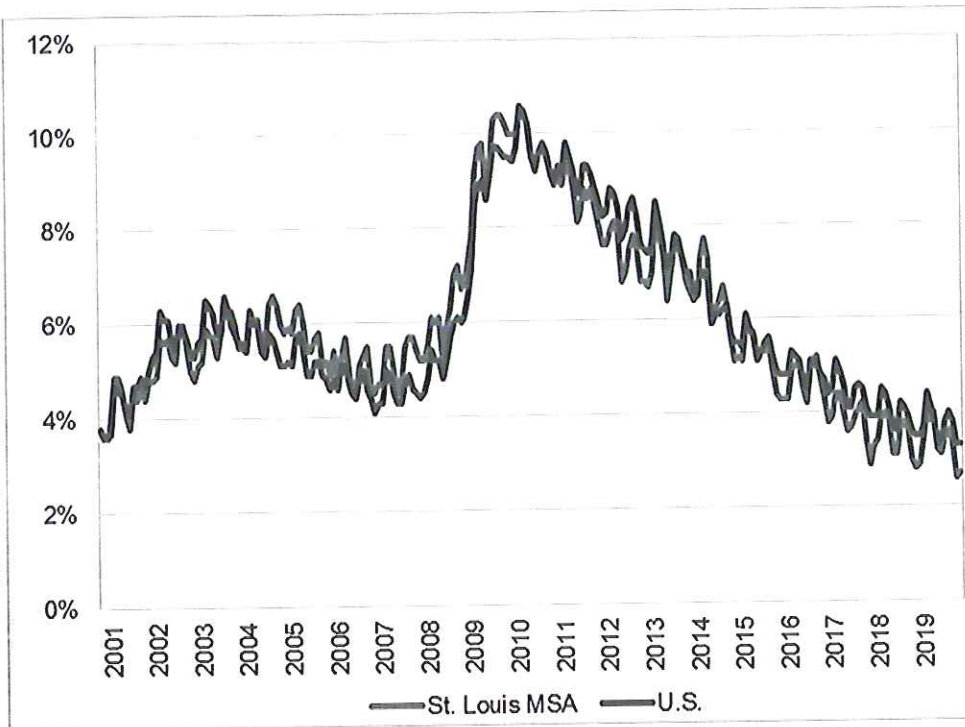
ST. LOUIS UNEMPLOYMENT

From October 2018 to October 2019, the number of employed persons in the St. Louis region increased by nearly 46,000 and the labor force increased by just over 45,600.

Unemployment Trends | PEOPLE

Not seasonally adjusted

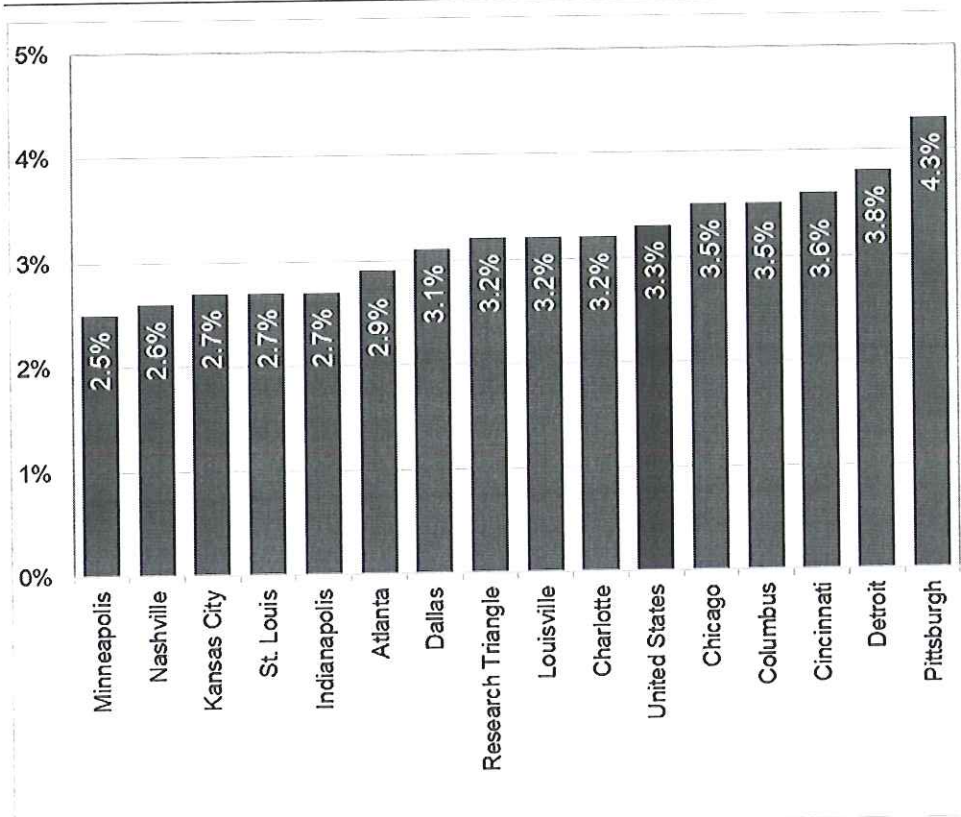
Note: Monthly data are not seasonally adjusted and October 2019 rates are preliminary.



Source: U.S. Bureau of Labor Statistics⁵

Unemployment by Peer Markets | PEOPLE

Not seasonally adjusted



Source: U.S. Bureau of Labor Statistics⁶

Snapshot NATIONAL COMPARISON

The St. Louis MSA unemployment rate continues to track below the national unemployment rate.

U.S. Metros RATE CHANGE

Unemployment rate change: October 2018
to October 2019

389 metropolitan areas total	
Lower	240
Unchanged	28
Higher	121

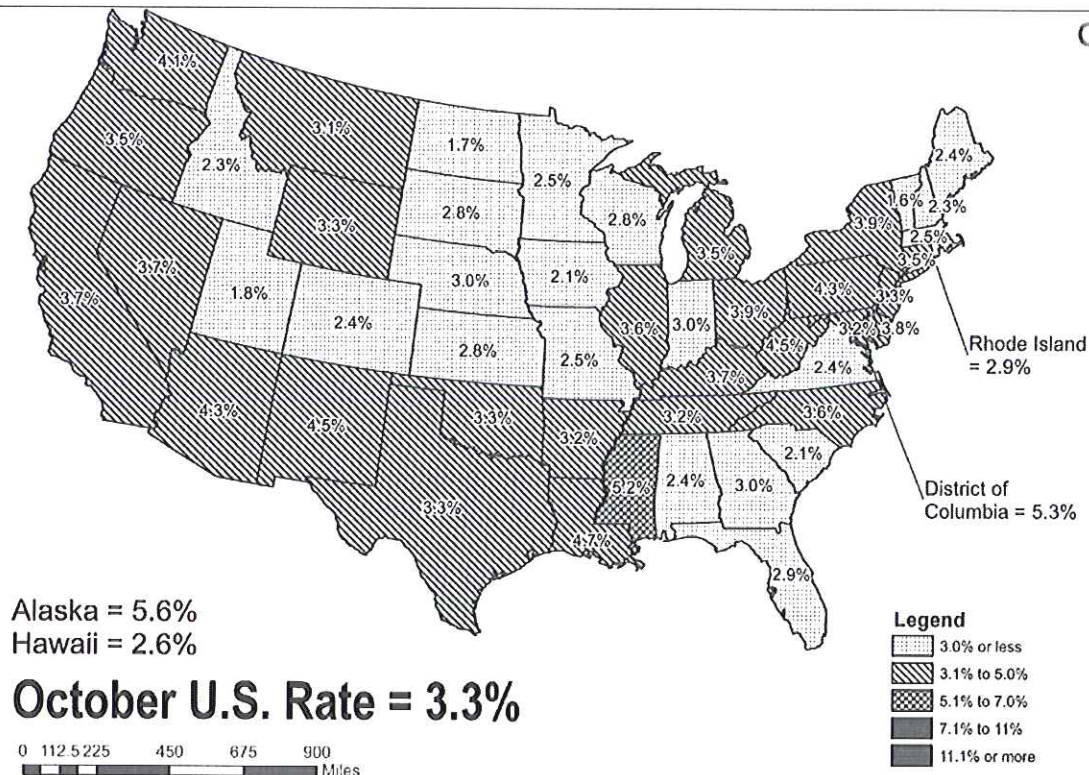
JOBLESS RATE

153 areas had jobless rates of less than 3.0 percent

2 areas had rates of at least 10.0 percent.

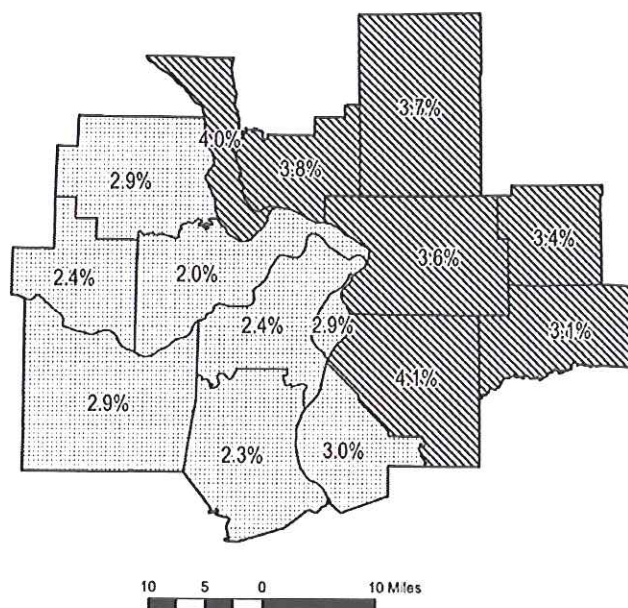
Geographic Distribution of Unemployment Rates | PEOPLE

October 2019

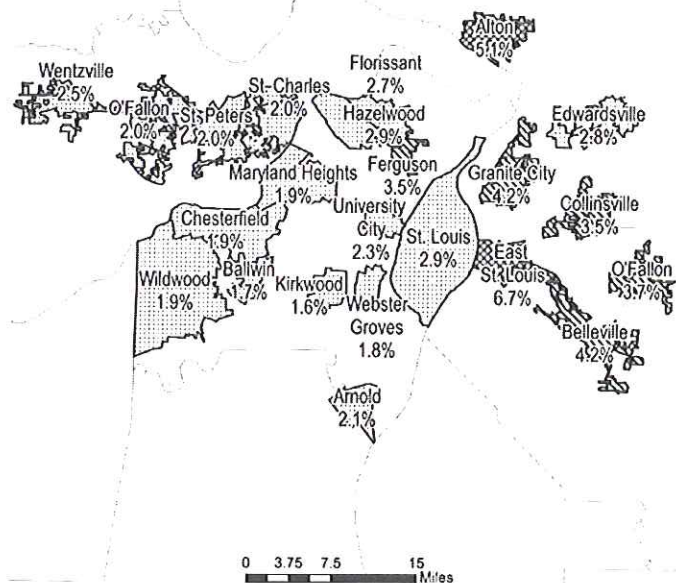


St. Louis, MO-IL MSA

MSA Rate = 2.7%



Larger Cities

Source: U.S. Bureau of Labor Statistics⁷

Note: Monthly data are not seasonally adjusted and October 2019 rates are preliminary

Civilian Labor Force | PEOPLE

Not seasonally adjusted

AREA	CURRENT MONTH - OCTOBER 2019 (P)				YEAR AGO - OCTOBER 2018			
	Labor Force	Employment	Unemployment Number	Unemployment Rate	Labor Force	Employment	Unemployment Number	Unemployment Rate
United States	142,576,000	100,007,000	5,510,000	3.3%	142,720,000	100,920,000	5,771,000	3.5%
Illinois	6,483,880	6,248,414	235,466	3.6%	6,477,162	6,213,931	263,231	4.1%
Missouri	3,141,572	3,062,597	78,975	2.5%	3,045,583	2,975,124	70,459	2.3%
St. Louis, MO-IL	1,501,055	1,460,178	40,877	2.7%	1,455,409	1,414,211	41,198	2.8%
Missouri Counties in St. Louis, MO-IL								
Franklin	54,255	52,703	1,552	2.9%	52,026	50,915	1,111	2.1%
Jefferson	119,822	117,106	2,716	2.3%	115,576	113,032	2,544	2.2%
Lincoln	28,346	27,512	834	2.9%	27,230	26,593	637	2.3%
St. Charles	229,384	224,706	4,678	2.0%	221,398	217,190	4,208	1.9%
St. Louis County	542,436	529,549	12,887	2.4%	523,385	511,372	12,013	2.3%
Warren	18,188	17,748	440	2.4%	17,488	17,151	337	1.9%
St. Louis City	158,280	153,616	4,664	2.9%	152,837	148,377	4,460	2.9%
Illinois Counties in St. Louis, MO-IL								
Bond	8,091	7,813	278	3.4%	7,949	7,608	341	4.3%
Calhoun	2,372	2,276	96	4.0%	2,325	2,218	107	4.6%
Clinton	20,842	20,196	646	3.1%	20,388	19,696	692	3.4%
Jersey	11,157	10,737	420	3.8%	10,993	10,483	510	4.6%
Macoupin	23,398	22,531	867	3.7%	23,046	21,975	1,071	4.6%
Madison	136,512	131,623	4,889	3.6%	134,734	128,690	6,044	4.5%
Monroe	18,977	18,405	572	3.0%	18,648	17,985	663	3.6%
St. Clair	128,995	123,657	5,338	4.1%	127,386	120,926	6,460	5.1%
Missouri Cities of 20,000 or more in St. Louis, MO-IL								
Arnold	11,823	11,571	252	2.1%	11,397	11,169	228	2.0%
Ballwin	17,373	17,074	299	1.7%	16,766	16,488	278	1.7%
Chesterfield	25,598	25,119	479	1.9%	24,713	24,257	456	1.8%
Ferguson	9,947	9,596	351	3.5%	9,630	9,267	363	3.8%
Florissant	28,689	27,905	784	2.7%	27,691	26,947	744	2.7%
Hazelwood	14,087	13,678	409	2.9%	13,581	13,209	372	2.7%
Kirkwood	16,279	16,013	266	1.6%	15,738	15,463	275	1.7%
Maryland Heights	16,485	16,168	317	1.9%	15,940	15,613	327	2.1%
O'Fallon	50,721	49,698	1,023	2.0%	48,939	48,035	904	1.8%
St. Charles	40,028	39,228	800	2.0%	38,747	37,916	831	2.1%
St. Louis	158,280	153,616	4,664	2.9%	152,837	148,377	4,460	2.9%
St. Peters	35,074	34,366	708	2.0%	33,849	33,217	632	1.9%
University City	19,139	18,700	439	2.3%	18,515	18,058	457	2.5%
Webster Groves	13,008	12,776	232	1.8%	12,547	12,337	210	1.7%
Wentzville	22,048	21,495	553	2.5%	21,168	20,776	392	1.9%
Wildwood	19,522	19,153	369	1.9%	18,815	18,496	319	1.7%
Illinois Cities of 25,000 or more in St. Louis, MO-IL								
Alton	11,735	11,132	603	5.1%	11,562	10,884	678	5.9%
Belleville	22,624	21,684	940	4.2%	22,251	21,206	1,045	4.7%
Collinsville	13,150	12,689	461	3.5%	13,014	12,407	607	4.7%
East St. Louis	9,087	8,474	613	6.7%	9,061	8,287	774	8.5%
Edwardsville	13,668	13,280	388	2.8%	13,508	12,984	524	3.9%
Granite City	13,390	12,831	559	4.2%	13,209	12,545	664	5.0%
O'Fallon	14,288	13,766	522	3.7%	14,086	13,462	624	4.4%

Nonfarm Employment | JOBS

Not seasonally adjusted

Year	ST. LOUIS MSA			UNITED STATES		
	October	Over-the-year change	Percent Change	October	Over-the-year change	Percent Change
2018	1,396,800	6,600	0.5%	150,853,000	2,653,000	1.8%
2019	1,420,200	23,400	1.7%	152,962,000	2,109,000	1.4%

Source: U.S. Bureau of Labor Statistics⁹

Note: National estimates for October 2019 are preliminary.

Nonfarm Employment | JOBS

Not seasonally adjusted

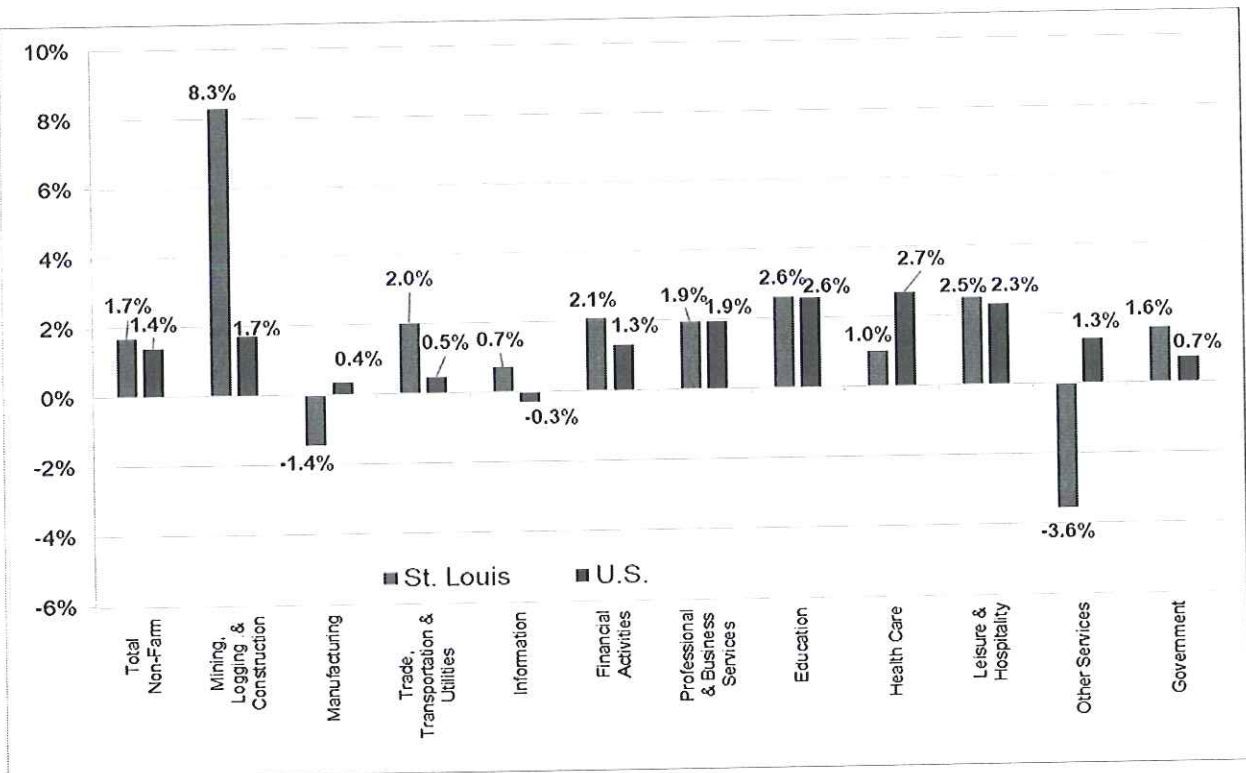
Year	ST. LOUIS MSA			UNITED STATES		
	Nonfarm Employment	Change	Percent Change	Nonfarm Employment	Change	Percent Change
1994	1,209,600	32,200	2.7%	114,398,000	3,463,000	3.1%
1995	1,229,500	19,900	1.6%	117,407,000	3,009,000	2.6%
1996	1,250,400	20,900	1.7%	119,836,000	2,429,000	2.1%
1997	1,274,700	24,300	1.9%	122,951,000	3,115,000	2.6%
1998	1,295,700	21,000	1.6%	126,157,000	3,206,000	2.6%
1999	1,312,300	16,600	1.3%	129,240,000	3,083,000	2.4%
2000	1,327,000	14,700	1.1%	132,024,000	2,784,000	2.2%
2001	1,328,400	1,400	0.1%	132,087,000	63,000	0.0%
2002	1,321,600	(6,800)	-0.5%	130,649,000	(1,438,000)	-1.1%
2003	1,312,500	(9,100)	-0.7%	130,347,000	(302,000)	-0.2%
2004	1,312,100	(400)	0.0%	131,787,000	1,440,000	1.1%
2005	1,328,100	16,000	1.2%	134,051,000	2,264,000	1.7%
2006	1,341,800	13,700	1.0%	136,453,000	2,402,000	1.8%
2007	1,350,900	9,100	0.7%	137,999,000	1,546,000	1.1%
2008	1,347,300	(3,600)	-0.3%	137,242,000	(757,000)	-0.5%
2009	1,290,700	(56,600)	-4.2%	131,313,000	(5,929,000)	-4.3%
2010	1,281,300	(9,400)	-0.7%	130,361,000	(952,000)	-0.7%
2011	1,293,600	12,300	1.0%	131,932,000	1,571,000	1.2%
2012	1,294,300	700	0.1%	134,175,000	2,243,000	1.7%
2013	1,303,900	9,600	0.7%	136,381,000	2,206,000	1.6%
2014	1,319,800	15,900	1.2%	138,958,000	2,577,000	1.9%
2015	1,344,800	25,000	1.9%	141,843,000	2,885,000	2.1%
2016	1,363,700	18,900	1.4%	144,352,000	2,204,000	1.8%
2017	1,377,400	13,700	1.0%	146,624,000	2,272,000	1.6%
2018	1,385,300	5,300	0.4%	149,074,000	2,450,000	1.7%
1994 - 2018 Total Change		175,200	14.5%	Total Change	34,675,000	30.3%
Compound Annual Growth Rate			0.54%	Compound Annual Growth Rate		1.06%

Source: U.S. Bureau of Labor Statistics¹⁰

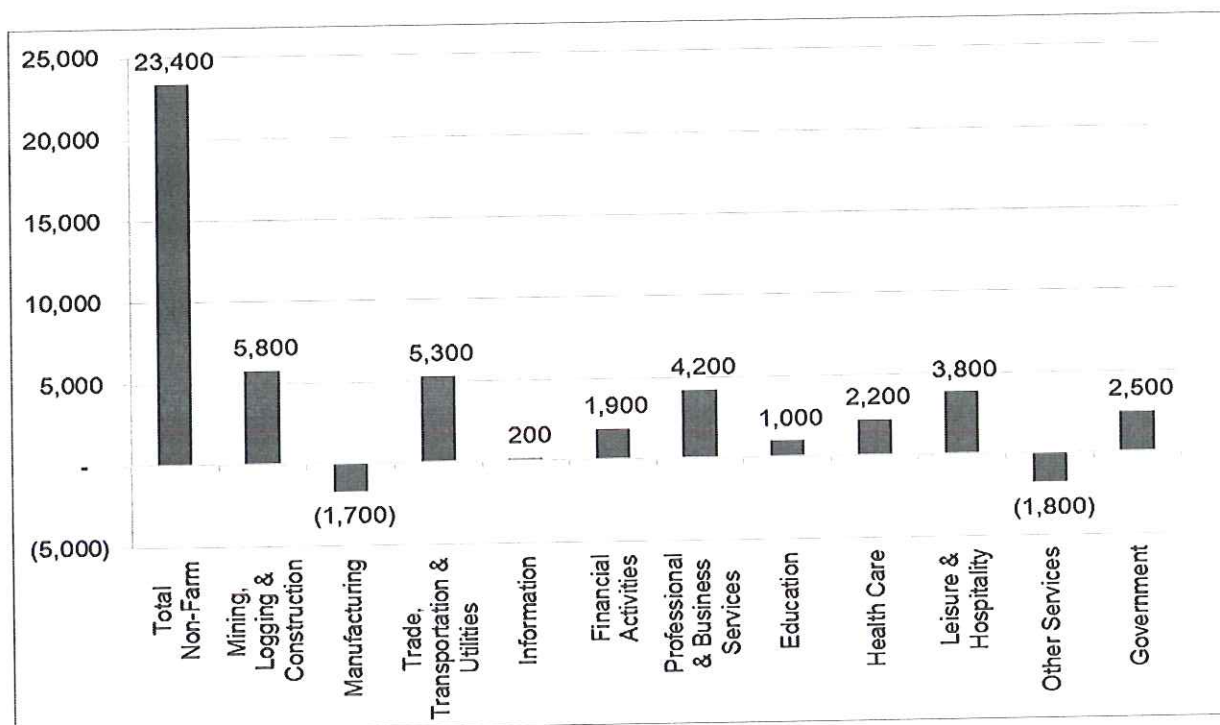
Employment Trends by Industry Sector | JOBS

Not seasonally adjusted

PERCENT CHANGE IN NONFARM EMPLOYMENT BY SECTOR
U.S. AND ST. LOUIS MSA, OCTOBER 2018 TO OCTOBER 2019



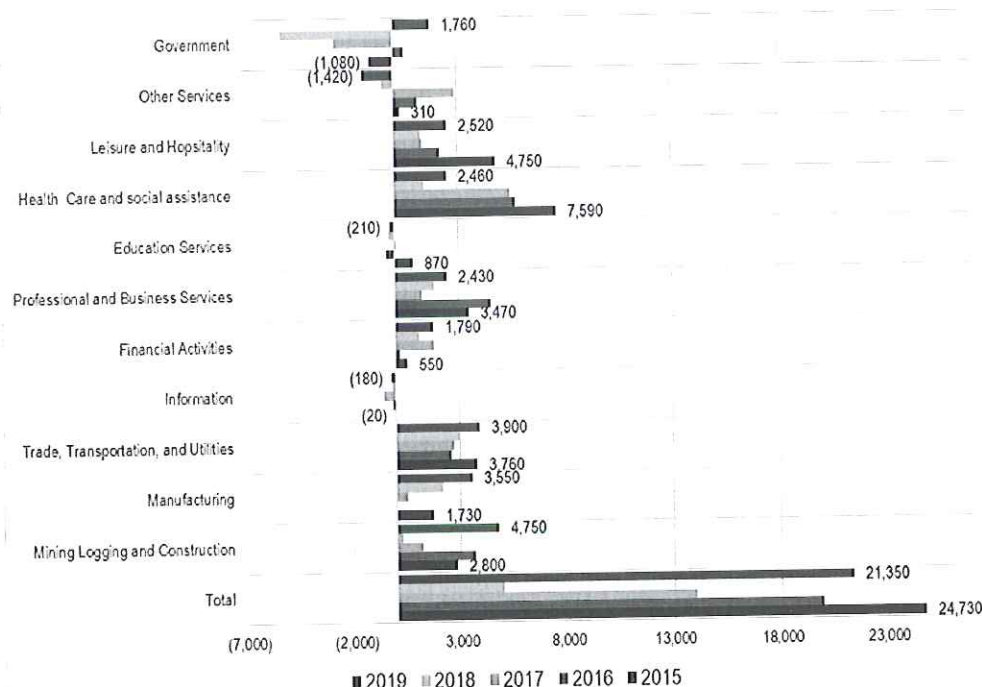
CHANGE IN NONFARM EMPLOYMENT BY SECTOR
ST. LOUIS MSA, OCTOBER 2018 TO OCTOBER 2019



Source: U.S. Bureau of Labor Statistics¹³

Note: Monthly data are not seasonally adjusted and October 2019 rates are preliminary

Employment Growth by Industry St. Louis MSA Jan to October 2015 - 2019 | JOBS



Source: U.S. Bureau of Labor Statistics ¹¹

Snapshot

Growth over time

During the first 10 months of 2019, regional employment growth has been healthy and approaching levels set during the same time in 2015.

This year, the construction, manufacturing and trade, transportation and utilities, financial activities, and government sectors all outpaced growth in 2015.

Employment Growth by Peer Markets | JOBS

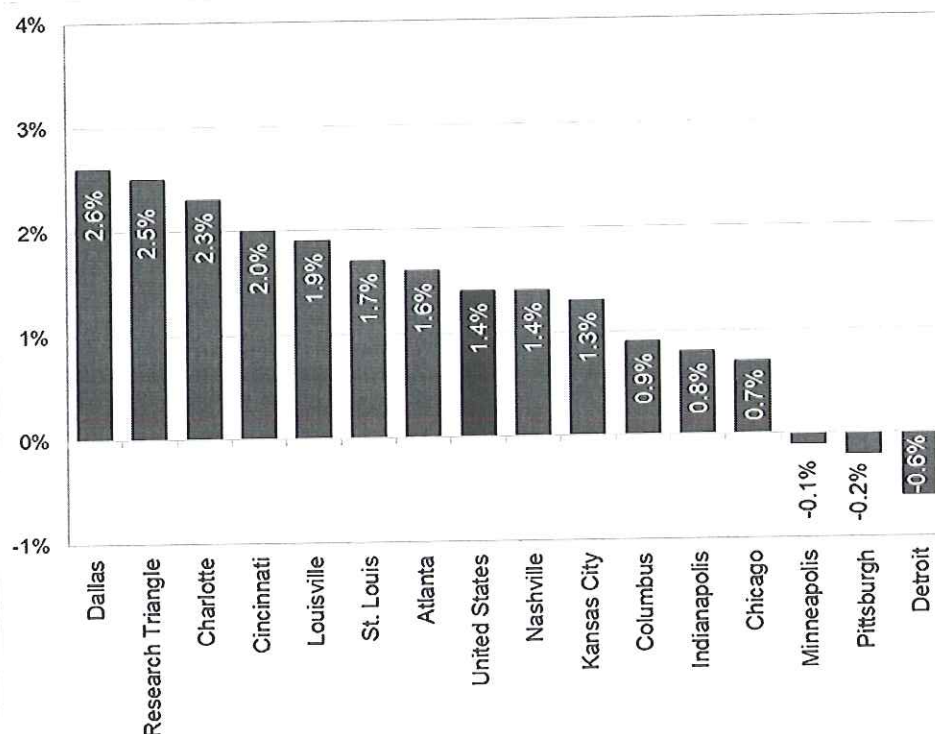
Not seasonally adjusted

U.S. Metro Rate Change

Nonfarm employment
change: October 2018
to October 2019

389 metropolitan areas total
Increased 49
Unchanged 340

Note: There is an expanded use of statistical significance in the BLS nonfarm payroll employment analysis. Changes in metropolitan area nonfarm payroll employment cited only if they have been determined to be statistically significant at the 90-percent confidence level.



Source: U.S. Bureau of Labor Statistics ¹²

Note: Monthly data are not seasonally adjusted and October 2019 rates are preliminary.

National Forecasts

More than 60 economists participate in a monthly national economic forecast published by *The Wall Street Journal*; this monthly consensus forecasts moderating economic growth through 2021.

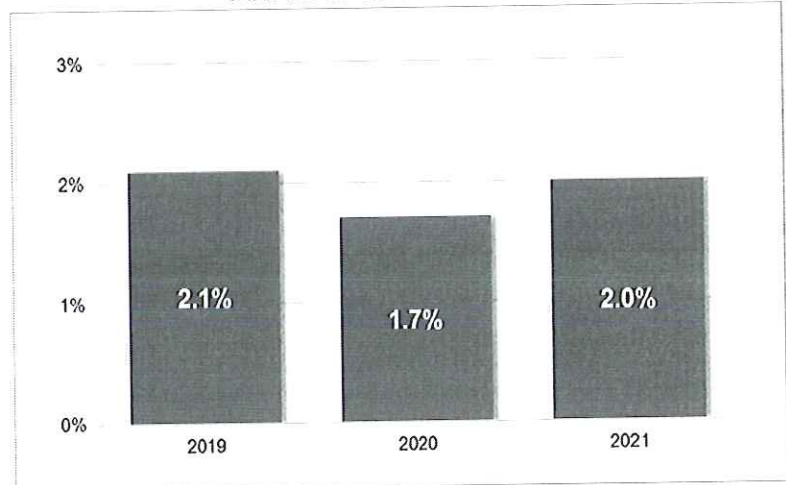
Snapshot

U.S. GDP is forecast to be 2.1% in 2019, 1.7% in 2020, and 2.0% in 2021.

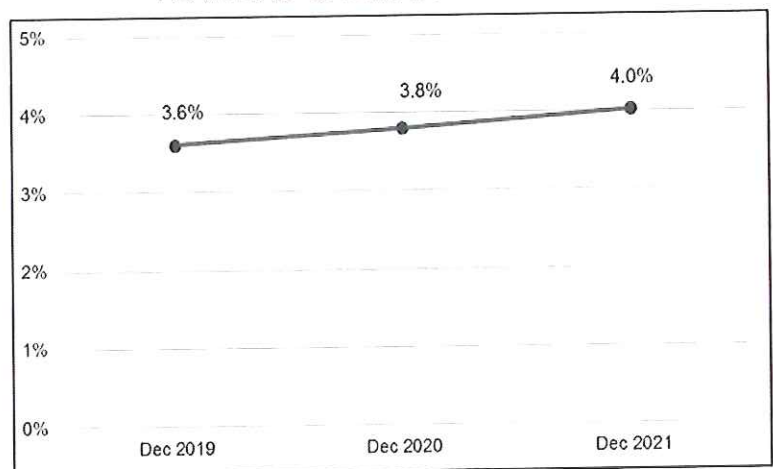
The nation's unemployment rate is expected to remain below 5 percent through the end of 2021.

Economists continue to expect employment growth over the next 12 months. The monthly job growth forecast for November 2019 was 127,086. If sustained, this level would add 1.5 million jobs over the next 12 months or an annual growth rate of 1.0% percent.

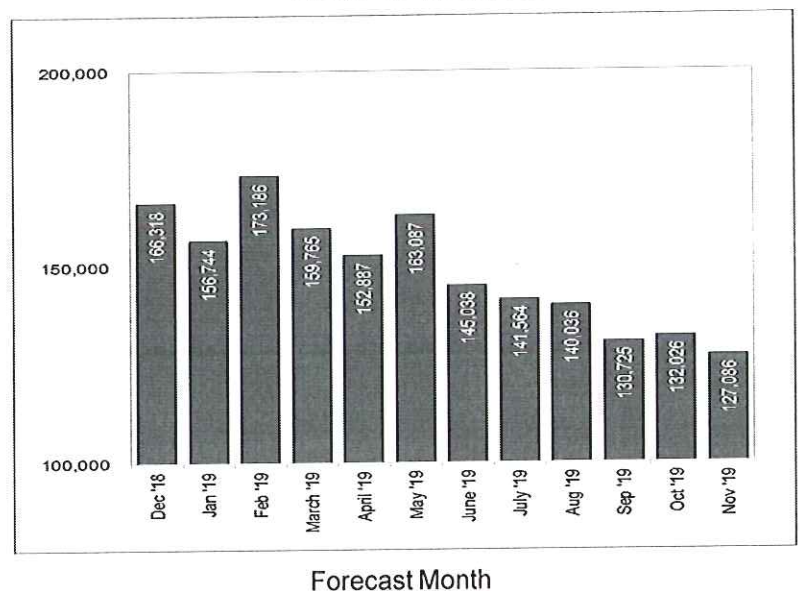
ANNUAL GDP FORECASTS



YEAR END UNEMPLOYMENT RATE



MONTHLY PAYROLL GROWTH FORECASTS
NEXT 12 MONTHS



Source: Wall Street Journal Economic Survey¹⁴

Survey Comparison

Each month, the Bureau of Labor Statistics releases current employment data in *The Employment Situation*. The data comes from two different surveys: the Current Population Survey (CPS), also known as the household survey, and the Current Employment Statistics (CES) survey, also known as the establishment or payroll survey.

While both surveys measure employment, they use different samples, employment definitions, estimation procedures, and concepts. These surveys track similarly over long periods but occasionally diverge in the short term.

	CURRENT POPULATION SURVEY	CURRENT EMPLOYMENT STATISTICS SURVEY
MONTHLY SAMPLE	Approximately 60,000 households	160,000 businesses & government agencies; firms of all sizes are included
MEASUREMENT	Unemployment & employment with significant demographic detail	Employment, earnings, & hours with significant industrial & geographic detail
REFERENCE PERIOD	Week that includes the 12 th of the month	Pay period that includes the 12 th of the month
WORK FORCE	Only workers aged 16 and older	Employees of all ages are included
EXHIBITS	The number of employed persons	The number of nonfarm payroll jobs
MULTIPLE JOB HOLDERS	Counted once	Counted for each payroll job
SELF-EMPLOYED PERSONS	Included	Excluded
AGRICULTURE SECTOR	Included	Excluded
PRIVATE HOUSEHOLD WORKERS	Included	Excluded
UNPAID FAMILY WORKERS	Included	Excluded
WORKERS ON LEAVE	Included	Excluded

Source: BLS, Monthly Labor Review¹⁵

	Current Employment Statistics Survey	Local Area Unemployment Statistics Survey
DESCRIPTION	Monthly survey of nonfarm business establishments for the estimation of industry employment, hours and earnings, for the 50 states and 250 metropolitan statistical areas surveyed.	Monthly estimates of labor force, Employment, and unemployment for state and local areas. The local unemployment estimates are the basis for determining area eligibility for benefits under the Workforce Invest Act and other federal programs.
DATA SOURCE	The program is a federal-state cooperative program between the U.S. Bureau of Labor Statistics and State agencies. The national sample consists of 400,000 businesses and is the largest survey of its kind.	Cooperative effort between the U.S. Bureau of Labor Statistics & State agencies. Models use both current and historical data from the Current Population Survey, Current Employment Statistics program, and Unemployment Insurance statistics program to provide estimates of employment and unemployment.
DEFINITION	The count of jobs by place of work rather than of employed persons.	Persons age 16 or older who, in the survey week, worked for pay or profit, or worked unpaid in a family operated business, or were temporarily absent from their regular jobs.
PROVISIONS	<p>Industry employment time series</p> <p>Total number of non-supervisory/production workers</p> <p>One of the earliest monthly economic indicators released by the government; usually causes immediate reaction in the stock and bond market</p> <p>Average weekly hours earnings</p> <p>View of the nation's economic health through employment numbers; earnings trends and wage push inflation through average hourly earnings; and short term fluctuations in demand through average weekly hours of work</p>	<p>Labor force, employment and unemployment rates</p> <p>Comparative rates</p> <p>Monthly date from 1990 to present</p> <p>Insight into state and local governments' planning and budgetary decisions</p> <p>Aids in the determination of need for employment and training services</p> <p>Determination of eligibility for federal programs and formula funding</p>

Sources

- 1 "Local Area Unemployment Statistics (LAUS)" , "Smoothed Seasonally Adjusted Metropolitan Area Estimates" and "Labor Force Statistics from the Current Population Survey" U.S. Bureau of Labor Statistics, <http://www.bls.gov/lau/home.htm#TABLES>, Accessed 11/27/19.
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- 3 "Local Area Unemployment Statistics (LAUS)" and "Labor Force Statistics from the Current Population Survey" U.S. Bureau of Labor Statistics, <http://www.bls.gov/data/#unemployment>, Accessed 11/27/19.
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- 11 "Employment, Hours, and Earnings (CES)" U.S Bureau of Labor Statistics, <http://data.bls.gov/pdq/querytool.jsp?survey=sm> , Accessed 11/27/19.
- 12 "Employment, Hours, and Earnings (CES)" U.S Bureau of Labor Statistics, <http://data.bls.gov/pdq/querytool.jsp?survey=sm> , Accessed 11/27/19.
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- 14 "Wall Street Journal Economic Survey: November 2019" <http://online.wsj.com/public/page/economic-forecasting.html>, Accessed 11/27/19.
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PREPARED November 27, 2019

NEXT RELEASE January 3, 2012

NEXT UPDATES • November 2019 data

BLS U.S. Level • December 6

BLS State Level • December 20

MO & IL State Labor Market Release • December 27 & 30

BLS Metro Level • January 3

ST. LOUIS, MO-IL MSA



**ALLIANCE
STL** St. Louis Regional
Economic
Development

COMPILED BY
RUTH SERGENIAN
DIRECTOR OF ECONOMIC RESERCH

ST. LOUIS REGIONAL CHAMBER
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THE ST. LOUIS REGIONAL CHAMBER IS THE CHAMBER OF COMMERCE AND ECONOMIC DEVELOPMENT ORGANIZATION FOR GREATER ST. LOUIS,
WHICH INCLUDES 15 COUNTIES IN MISSOURI & ILLINOIS.

REGION

The St. Louis Region is comprised of 5 counties and is located in the east central part of Missouri. The region is home to several cities including Arnold, Washington, St. Charles, St. Peters, Florissant,

O'Fallon, Chesterfield, and the City of St. Louis.

The St. Louis Region workforce has over 1,036,000 employees, making up 35.1 percent of Missouri's employment. In 2018, 51 percent of the workforce was female and 49 percent was male.

The workforce is getting older in the St. Louis Region, a trend happening throughout Missouri and the U.S. In 2018, 24 percent of the workforce was age 55 or older, up from 18 percent a decade earlier.

For the region, 23 percent of the workforce was non-white, compared to 17 percent for the state; 3 percent of the region's workforce was Hispanic or Latino, compared to 4 percent for Missouri.

For 8 percent of the region's population (ages 18 to 64) the primary language spoken at home is something other than English. By comparison, Missouri was at 7 percent and the U.S. population at 23 percent.

The St. Louis Region has a lower percentage of the population with a disability compared to the state, but evenly matched to the nation. For the St. Louis Region, 10 percent of the population has a disability compared to 13 percent in Missouri and 10 percent in the U.S.



Workforce Demographics

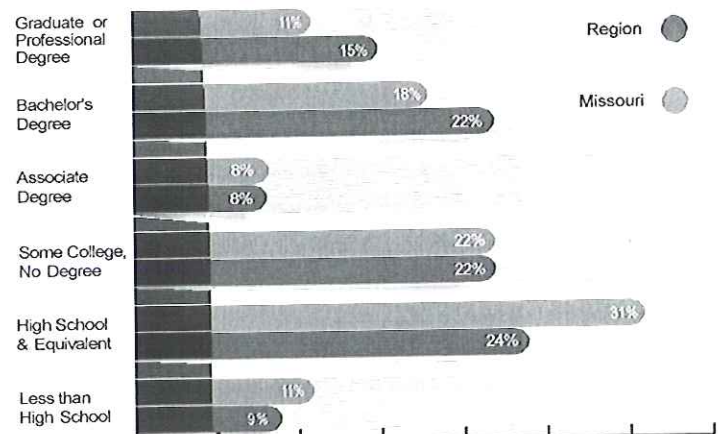
	St. Louis MO	Missouri	Nationwide
Average monthly employment in 2018	1,036,697	2,954,808	155,761,000
Average Unemployment Rate in 2018	3.0%	3.2%	3.9%
Female	51%	51%	50%
Male	49%	49%	50%
Non-white	23%	17%	23%
Hispanic or Latino	3%	4%	15%
Ages 55 & older	24%	23%	23%
With disabilities (ages 18-64)	10%	13%	10%
Below Poverty Levels (ages 18-64)	11%	14%	14%
Language other than English (ages 18-64)	8%	7%	23%
Associate degree or higher (Age 25+)	45%	36%	39%

SOURCES: CENSUS ACS 2017-5YR EST., BLS QCEW NOT-SEASONALLY ADJUSTED

Educational attainment rates for the St. Louis Region are greater than those of the state in regards to bachelor's or advanced degrees. Forty-five percent of the region's population, age 25 and older, has an associate, bachelor's or advanced degree compared to 36 percent for the state.

The regional unemployment rate was 3.0 percent in 2018 overall, and as of May 2019, the preliminary rate stands at 2.9 percent, slightly up from 2.8 percent in May 2018. From May 2014 to May 2019, the unemployment rate dropped 3.3 points.

Educational Attainment



ST. LOUIS REGION

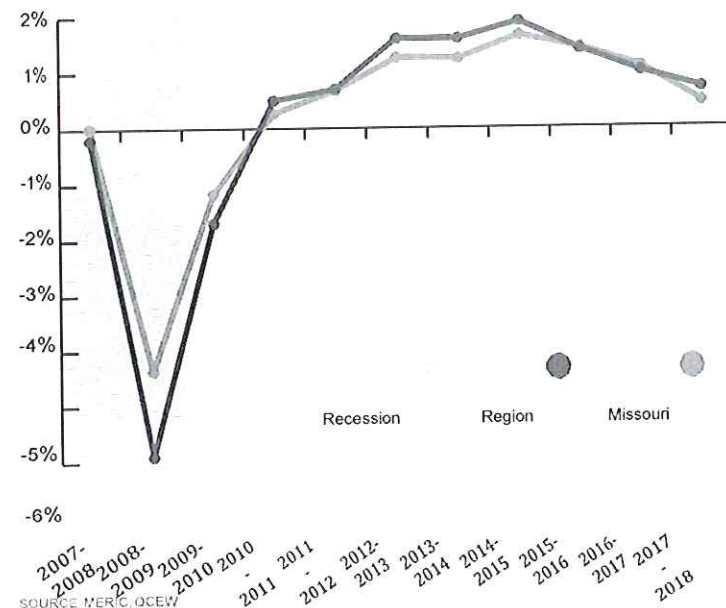
0% 5% 10% 15% 20% 25% 30% 35%
SOURCE: U.S. CENSUS BUREAU, ACS 2017 5-YEAR ESTIMATES

MISSOURI WORKFORCE 2019 1

INDUSTRY ANALYSIS

The St. Louis Region averaged an annualized 1,036,697 employees in 2018 and added 7,577 jobs from June 2017 to June 2018, growing 0.7 percent. Missouri employment increased by 0.4 percent in that time. From 2014 to 2018, the St. Louis Region averaged 1.0 percent annual growth for an overall increase of 5.2 percent; during that same period Missouri's employment grew 4.8 percent.

St. Louis Employment Annual Growth Rate



Health Care continues to be one of the largest employing industries in the region, showing consistent growth from 2013 to 2018, increasing over 23,600 jobs since 2013. Retail Trade is the second largest industry adding over 5,900 jobs. Accommodation and Food Services added over 7,900 jobs, an increase of nearly 1.6 percent each year for the region.

Manufacturing continues to grow at an annualized 1.5 percent. Administrative and Support grew by over 6,600 jobs. Educational Services maintains steady employment. Lastly, The Professional and Technical Services industry gained over 7,400 jobs.

St. Louis Region Top Employing Industries

Industry	Employment		Net Change	2013-2018 Empl. CAGR	2018 Annual Wages
	2013	2018			
Health Care & Social Assistance	157,123	180,773	23,650	2.8%	\$45,432
Retail Trade	105,248	111,191	5,943	1.1%	\$29,748
Accommodation & Food Services	94,502	102,458	7,956	1.6%	\$18,684
Manufacturing	85,780	92,276	6,496	1.5%	\$38,109

LOCATION QUOTIENT

To understand the major industries within a region, an analysis of industry concentration or clustering can be useful. The Location Quotient (LQ) describes the concentration of an industry in a geographic region, in relation to the nation, with 1.0 being the national average. Industries higher than 1.0 indicate a concentration.

The St. Louis Region has higher concentrations in Data Processing, Management of Companies, Chemical Manufacturing, Beverage & Tobacco Manufacturing and Hospitals, just to name a few.

Large employers do not necessarily have a high LQ, though sometimes that is the case. The St. Louis Region's largest employers includes health care providers Barnes-Jewish Hospital, SSM-St. Mary's Hospital, Mercy Hospital system, St. Luke's Hospital.

Other large employers include Anheuser-Bush, Enterprise, General Motors, Boeing, Nestle Purina, Edward Jones, and

Wells Fargo all ranked among the top employers in their respective industry sectors. St. Louis University, Washington University, and the University of Missouri—St. Louis are also major public sector employers in the region.

HIGHEST 2018

LQ 2.4
DATA PROCESSING

2018 St. Louis Region Location Quotients

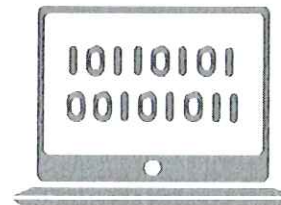
ST. LOUIS REGION

Administrative & Support	76,176	82,803	6,627	1.7%	\$37,980
Educational Services	81,572	81,610	38	0.0%	\$53,628
Professional, Scientific & Tech. Svc	63,434	70,889	7,455	2.2%	\$80,244
Finance & Insurance	61,137	64,151	3,014	1.0%	\$84,588
Wholesale Trade	54,153	53,416	(737)	-0.3%	\$70,980
Construction	49,166	53,156	3,990	1.6%	\$59,748

SOURCE: LEHD-QWI, 2013-2018 2ND QUARTER

Beverage & Tobacco Manufacturing	3,597	1.7
Hospitals	63,161	1.6
Securities, Commodities, Investments	11,098	1.5
Broadcasting (except internet)	3,043	1.5
Printing Support	4,818	1.5
Telecommunications	8,337	1.4
Machinery Manufacturing	12,147	1.4
Lessor of Nonfinancial Assets	245	1.4
Social Assistance	36,946	1.2
Educational Services	26,642	1.2
Insurance Carriers & Related	21,310	1.2
Merch. Wholesalers, durable goods	28,641	1.2
NonStore Retailers	5,158	1.2

SOURCE: MERIC, QCEW, 2018 ANNUAL AVERAGES



ST. LOUIS REGION

Projected growth in industry helps to identify future employment needs for an area. Projections indicate that the largest growth industries in the St. Louis Region will be Health Care and Social Assistance, Accommodation and Food Services, Administrative and Support, Educational Services, and Professional, Scientific, and Technical Services.

St. Louis Region Largest Growth Industries 2016-2026

Industry	Employment		Change	
	2016 Estimated	2026 Projected	2016-2026 Numeric	Percent
Health Care & Social Assistance	172,682	203,183	30,501	17.66%
Accommodation & Food Services	99,417	108,558	9,141	9.19%
Administrative & Support	66,984	75,189	8,205	12.25%
Educational Services	80,141	86,770	6,629	8.27%
Professional, Scientific, & Technical Services	63,425	69,480	6,055	9.55%
Finance & Insurance	57,744	63,182	5,438	9.42%
Local Government, Excluding Educ. & Hospitals	36,986	38,294	1,308	3.54%
Other Services (except Government)	51,263	52,469	1,206	2.35%
Management of Companies	39,461	40,430	969	2.46%
Retail Trade	109,754	110,681	927	0.84%

SOURCES: MERIC INDUSTRY PROJECTIONS



PROJECTED GROWTH IN INDUSTRY HELPS TO IDENTIFY FUTURE EMPLOYMENT NEEDS FOR AN AREA.

OCCUPATIONAL PROJECTIONS

MERIC produces occupational projections that estimates labor demand over a 10-year period. MERIC categorizes these occupations using its Now-Next-Later method to help job seekers understand the training, education, and experience requirements for various occupations.

Now jobs typically require short-term on-the-job training, little to no experience, and/or a high school diploma. Now occupations include Food Preparation and Serving Workers, Cashiers, and Retail Salespersons which lead the way in total openings. Personal Care Aides, Home Health Aides, and Helpers—Production Workers are projected to be the fastest growing Now occupations over the next decade.

Next jobs typically require a non-degree certificate, associate degree, apprenticeship, some experience, or moderate- to long-term training. Nursing Assistants, Cooks, and Bookkeeping & Accounting Clerks will have the most openings for the Next category of occupations. Respiratory Therapists, Physical Therapist Assistants, and Phlebotomists are the fastest growing Next occupations.

Later jobs typically require a bachelor's degree or higher. For Later occupations, Registered Nurses, General & Operations Managers, and Accountants and Auditors will have the most

St. Louis Region Fastest Growing Occupations

Personal Care Aides
Home Health Aides

Helpers—Production Workers
Nonfarm Animal Caretakers
Food Preparation & Serving Workers

Respiratory Therapists
Physical Therapist Assistants
Phlebotomists
Occupational Therapy Assistants
Massage Therapists

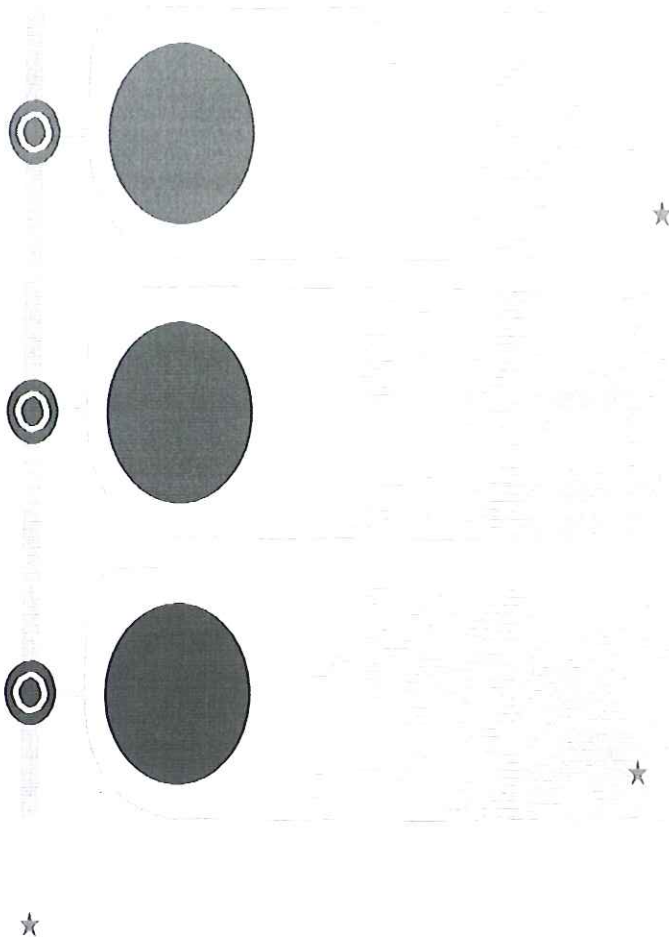
Information Security Analyst
Nurse Practitioners
Statisticians
Health Specialties Teachers, Postsecondary
Software Developers, Applications

openings. Information Security Analysts, Nurse Practitioners, and Statisticians are the fastest growing Later occupations.

NOTE: OCCUPATIONS WITH NET INCREASE OF LESS THAN 50 ARE OMITTED

SOURCE: MERIC OCCUPATIONAL PROJECTIONS, 2016-2026

DENOTES OCCUPATIONS TOP TEN ONLINE JOB ADS FOR 2018 IN THE REGION AND WITHIN THE NOW-NEXT-LATER CLASSIFICATIONS

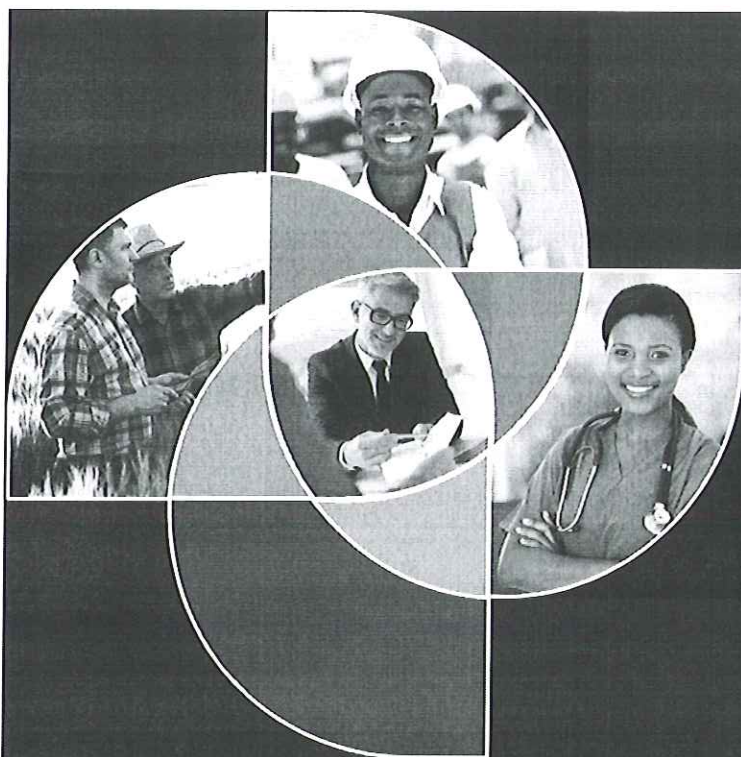


St. Louis Region Long-Term Occupational Projections by Top Openings

Occupation	2016 Estimated Employment	2026 Projected Employment	Growth Openings	Exits	Transfers	Total Openings	Median Wages
NOW							
Food Prep. & Serving Workers	28,387	32,764	4,377	27,075	28,316	59,768	\$18,865
Cashiers	24,607	24,451	-156	23,030	22,476	45,350	\$21,120
Retail Salespersons	30,188	29,238	-950	18,811	23,580	41,441	\$23,184
Waiters & Waitresses	21,079	21,877	798	15,898	24,358	41,054	\$19,041 ★
Personal Care Aides	19,093	26,401	7,308	18,154	13,675	39,137	\$22,219
NEXT							
Cooks, Restaurant	11,171	12,163	992	6,836	9,334	17,162	\$23,651 ★
Bookkeeping & Accounting Clerks	12,879	12,437	-442	7,838	6,082	13,478	\$39,553
Supervisors of Food Prep. & Serving Workers	8,689	9,364	675	4,044	8,612	13,331	\$28,875
Retail Sales Supervisor	11,152	11,308	156	4,145	7,557	11,858	\$40,8804
LATER							
General & Operations Managers	16,754	18,003	1,249	3,603	10,366	15,218	\$104,336 ★
Accountants & Auditors	11,693	12,539	846	3,577	6,972	11,395	\$70,133
Elementary School Teachers	8,780	9,449	669	3,008	3,374	7,051	\$52,527
Business Operations Specialists	7,041	7,534	493	2,286	4,204	6,983	\$71,729

SOURCE: MERIC OCCUPATIONAL PROJECTIONS 2016-2026

★ DENOTES OCCUPATIONS IN THE TOP TEN FOR 2018 ON-LINE JOB ADS IN THE REGION & WITHIN THE NOW-NEXT-LATER CLASSIFICATION



DEPARTMENT OF
HIGHER EDUCATION &
WORKFORCE DEVELOPMENT

For more information, visit
meric.mo.gov or dhewd.mo.gov



St. Louis Community College
Expanding Minds. Changing Lives.

A Report to the Region



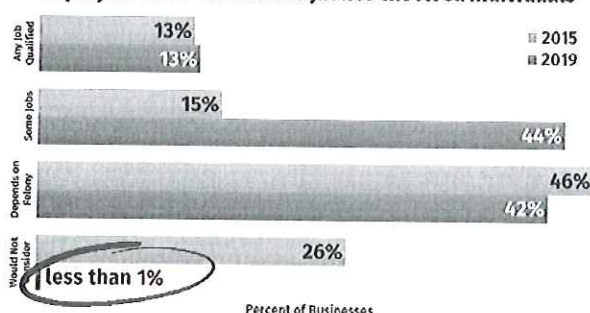
Since 2009, the College and its research partners have tracked the recovery and growth of the region's workforce, as well as its continuing challenges, by publishing an annual analysis of local employer survey responses and labor market data from the state. From surprising hiring trends to high-demand jobs, the 2019 report provides a wealth of interesting information. STLCC has identified key takeaways to emphasize some of the more thought-provoking insights.

Two Findings From the Survey

1. St. Louis employers are pulling in a bit. Two years ago, we were surrounded by evidence of economic growth and a full employment economy. However, this year's data provides indications that employers are at least somewhat concerned about the future and are taking steps to reduce risk. The percentage of employers reporting they will hire new full-time employees dropped by 6% compared to the 2017 response (63% vs. 69%). The number of employers indicating they will hire new part-time workers grew from 66% to 69%, the highest level seen in the last eight years.

2. Employers are increasingly willing to consider justice-involved employees. One of the most interesting shifts this year has been in how employers view applicants with criminal records. Just in the last four years, the considerable number of employers who said they would not hire applicants convicted of a felony dropped from 26% to less than 1%, evidence that mindsets may be changing.

Employers and Positions for Justice-Involved Individuals

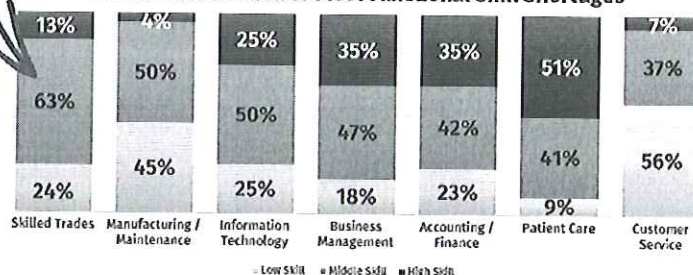


More eye-opening insights are available in St. Louis Community College's 2019 State of the St. Louis Workforce Report. We invite you to download the full report at stlcc.edu/stlworkforce now to learn more.

Jeff L. Pittman, Ph.D.
Chancellor

Middle-skill—requiring training or education beyond high school but less than a four-year degree—was the most cited skill level for five of the seven functional areas.

Skill Levels Needed to Meet Functional Skill Shortages



MORE THAN
33%

of local employers reported that they were experiencing a shortage of skilled applicants

\$300 MILLION

can be pumped into some of the poorest neighborhoods when 127 Urban League Save Our Sons graduates keep a job for just one year

Source: St. Louis Public Radio

94%

of Mission: St. Louis Job & Leadership Training (JLT) graduates—all of whom are justice-involved—have no new legal offenses

Source: Mission: St. Louis

59%

of workplace accommodations for people with disabilities cost absolutely nothing, while the rest of accommodations have a typical cost of only \$500

Source: IAN survey

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The State of the St. Louis Workforce Report is brought to you each year by the Workforce Solutions Group of St. Louis Community College. The Workforce Solutions Group addresses the College's strategic initiative of Aligning with Workforce Needs by offering workforce solutions designed to advance people, businesses and communities.

Download the full report at stlcc.edu/stlworkforce.