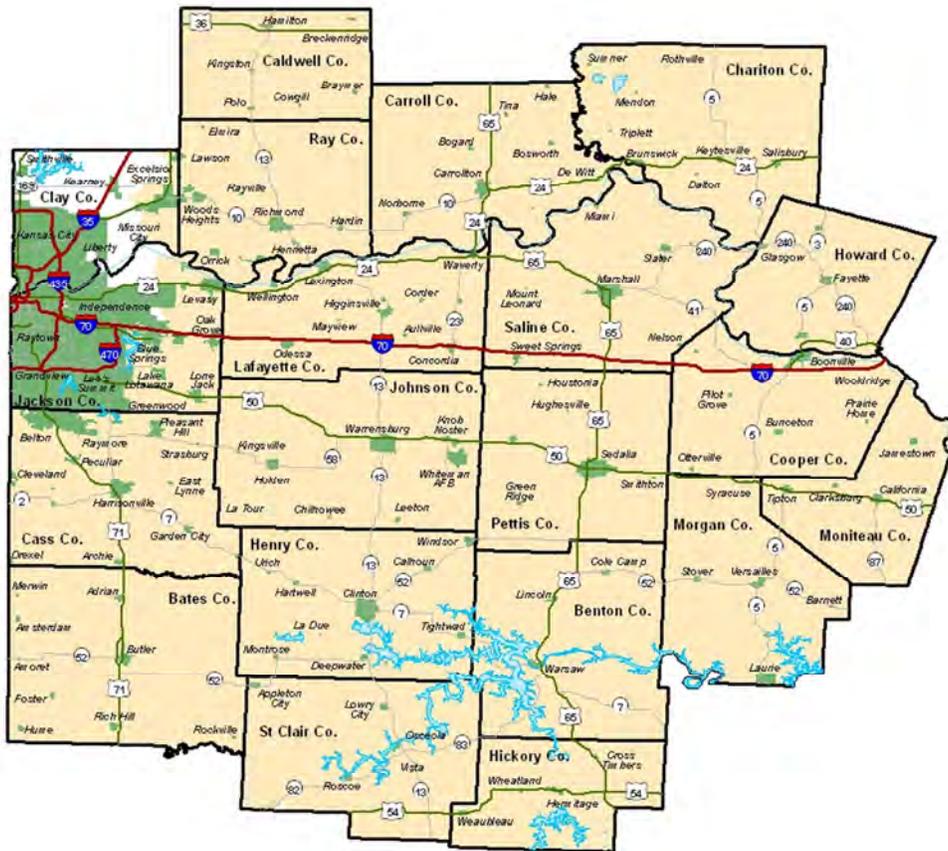


West Central Missouri Region Labor Availability Analysis – 2012

Including a comparison to data from the
2005 and 2009 Labor Availability Analyses

Bates • Benton • Caldwell • Carroll • Cass • Chariton • Clay •
Cooper • Henry • Hickory • Howard • Jackson • Johnson • Lafayette •
Moniteau • Morgan • Pettis • Ray • Saline • St. Clair Counties



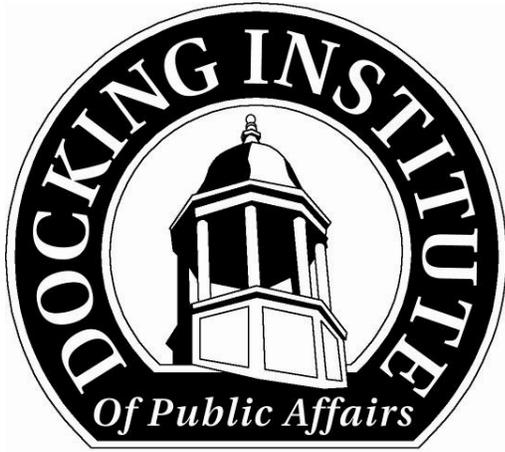
Prepared For

Central Missouri Economic Development Alliance

By

The Docking Institute of Public Affairs

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Mission:

To Facilitate Effective Public Policy Decision-Making.

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West Central Missouri Region Labor Availability Analysis - 2012

Including a comparison to data from the
2005 and 2009 Labor Availability Analysis

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Henry County
Johnson County
Lafayette County
Pettis County
Saline County

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West Central Missouri Region Labor Availability Analysis

Executive Summary

The West Central Missouri Region includes Bates, Benton, Caldwell, Carroll, Cass, Chariton, Cooper, Henry, Hickory, Howard, Johnson, Lafayette, Moniteau, Morgan, Pettis, Ray, Saline, and St. Clair Counties in Missouri, plus portions of Clay and Jackson Counties east of Kansas City. The purpose of this report is to assess the “Available Labor Pool” in this labor basin. The “Available Labor Pool” represents those who indicate that they are looking for employment or would consider changing their jobs for the right employment opportunity.

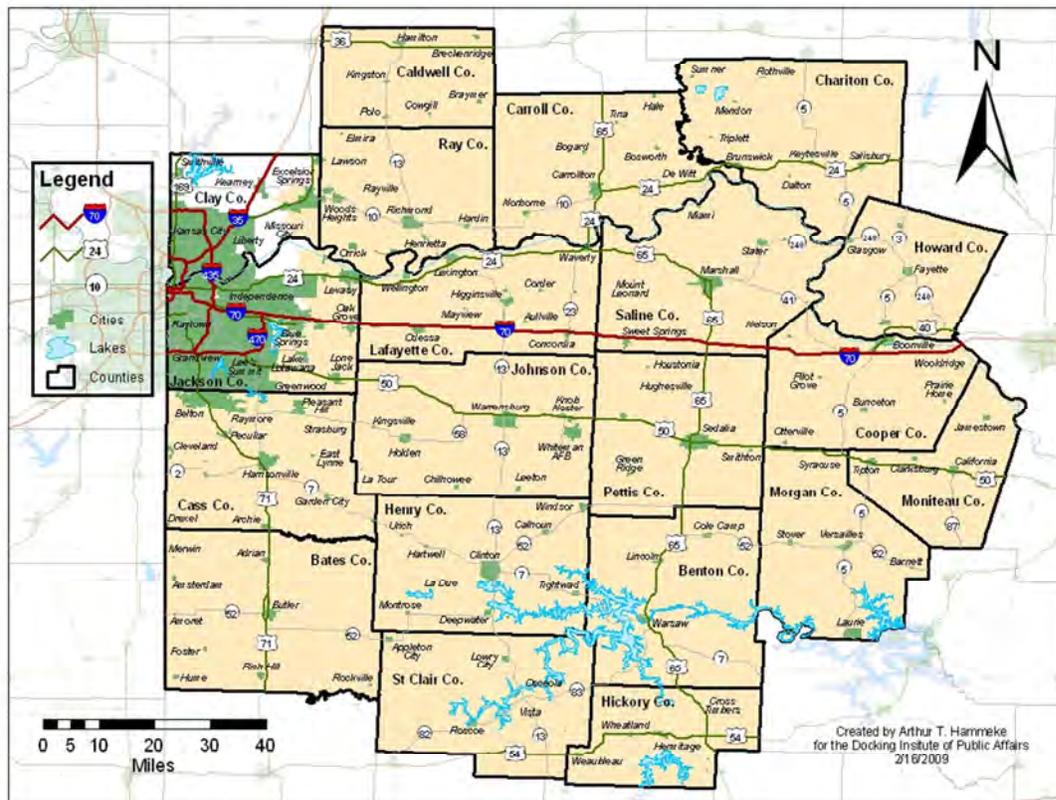
The Docking Institute’s independent analysis of this labor basin shows that:

- The population of the West Central Missouri Region is estimated to be 511,627. About 29% of the population (or 149,840 individuals) are considered to be part of the Available Labor Pool (Available Labor Pool).
- Of the Available Labor Pool, an estimated 18,168 (12.1%) non-working and 19,674 (13.1%) working individuals are *looking* for new employment, while 35,035 (23.4%) non-working and 76,963 (51.4%) working individuals would *consider* new and/or different employment for the right opportunities.
- Slightly more than 63% of the Available Labor Pool has at least some college experience and 94% has at least a high school diploma. The average age for members of the Available Labor Pool is about 46 years old, and women make up more than half (55.2%) of the Available Labor Pool.
- An estimated 21,744 members of the Available Labor Pool are currently employed as general laborers, while an additional 11,253 work in government services or technical/high skill blue-collar occupations. An estimated 42,351 members of the Available Labor Pool work in service sector jobs, while 21,288 work in professional white-collar jobs. Many (53,203) are not currently working.
- About 84% of the Available Labor Pool indicates that they are “willing to work outside of their primary field of employment for a new or different employment opportunity.”
- Slightly more than 39% of the members of the Available Labor Pool will commute up to 45 minutes, one way, for an employment opportunity, while almost 84% will commute up to 30 minutes for employment.
- The four most important desired benefits in order are good salary or hourly wage, good health benefits, good retirement benefits, and on-the-job or paid training.
- An estimated 18,689 members (12%) of the Available Labor Pool are interested in a new job at \$9 an hour, 45,551 (30%) are available at \$12 an hour, and 71,985 (48%) are available at \$15 an hour.
- Of the 96,637 members in the subset of *employed members* of the Available Labor Pool, 30,924 (32%) consider themselves underemployed.
- A comparison of data presented in 2009 and 2005 for the labor region suggests that there is a much larger proportion of *non-employed* Available Labor Pool members *available for full-time employment* in 2012 than in 2009 and 2005, while a smaller proportion of *employed* Available Labor Pool members are *looking* for work in 2012 than in 2005 or 2009.

The West Central Missouri Region

The West Central Missouri Region includes eighteen counties in west central Missouri and portions of two more near Kansas City (see Map 1 below). This report provides an overview of the entire labor region – which is made up of five labor basins: Henry, Johnson, Lafayette, Pettis, and Saline. Please see individual reports for more details about each labor basin.

Map 1: West Central Missouri Region



The West Central Missouri Region has a total population of approximately 511,627, and a Civilian Labor Force (CLF) of 246,603. There is an unemployment rate of 9.68%, and this research suggests that there is a good supply of available labor for a new employer and/or for an employer desiring to expand employment.

The Docking Institute's analysis suggests that the basin contains an Available Labor Pool (Available Labor Pool) of 149,840 individuals. The Available Labor Pool is composed of workers categorized as either 1) currently not working *but* looking for full-time employment, 2) currently employed (full- or part-time) *and* looking for other full-time employment, 3) currently not working in any manner *but* willing to consider full-time employment for the *right opportunity*, and 4) currently employed and not looking, *but* willing to consider different full-time employment for the *right opportunity*. Please see the Methodology section – page 25 – for more information about the Institute's Available Labor Pool analysis methodology and the survey research methods used for this study.

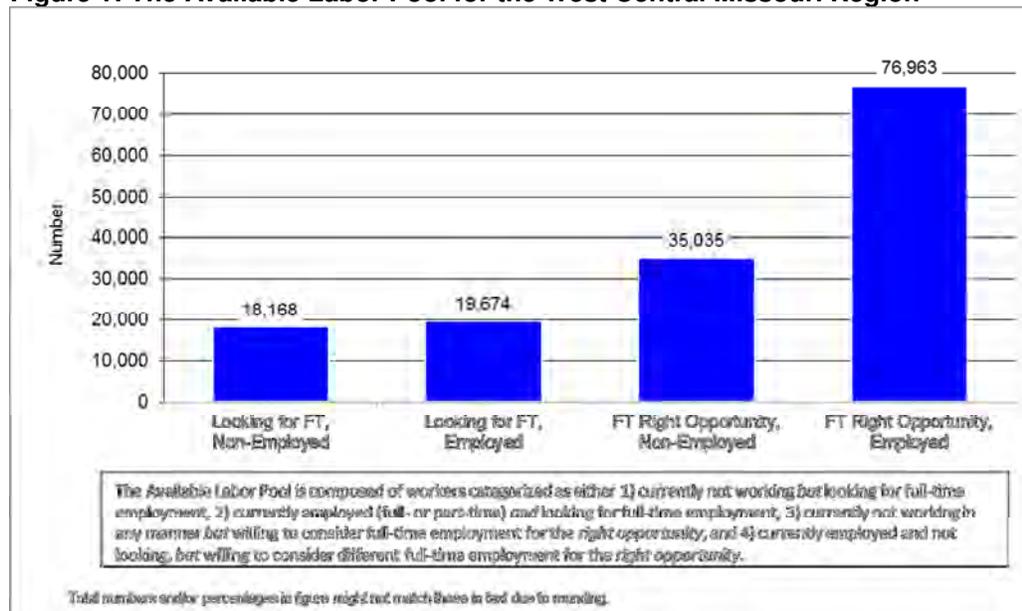
The West Central Missouri Region’s Available Labor Pool

This section of the report assesses the characteristics of the Available Labor Pool in the West Central Missouri Region by answering the following questions:

- What proportion of the labor force – employed, unemployed, homemaker, students, retired and disabled – would seriously consider a new full-time employment opportunity?
- What skills do those who would consider a new employment opportunity have?
- What types of jobs have these workers and potential workers had in the past?
- What types of considerations (pay, benefits, commute time) shape their decision-making?
- What percentage of the Available Labor Pool is willing to change fields of employment?
- What work shifts are Available Labor Pool members willing to work?
- What proportion of those workers among the Available Labor Pool is considered “underemployed?”
- What are some of the characteristics of those underemployed workers?
- How do the results of this study compare to one conducted in 2005 and 2009?

It is estimated that 18,168 (12.1% of the Available Labor Pool) non-employed¹ and 19,674 (13.1%) employed individuals are *currently looking* for new or different full-time employment, and 35,035 (23.4%) non-employed individuals and 76,963 (51.4%) employed individuals *would consider* new or different full-time employment for the right opportunities.

Figure 1: The Available Labor Pool for the West Central Missouri Region



¹ The terms “non-employed” and “non-working” refer to officially unemployed members of the Civilian Labor Force as well as any non-employed/non-working full-time students, homemakers, retirees, and disabled individuals.

Map 2 shows how each zip code in the basin compares to all other zip codes in terms of the percent of total available labor in the West Central Missouri Region. Each zip code is grouped into one of five categories specified in the legend. Large portions of the Available Labor Pool are located in zip code areas in Cass, Johnson, Pettis, and Saline Counties, although all counties in the region contain members of the available labor pool.

Map 2: Percent of Total Available Labor in Basin by Zip Code

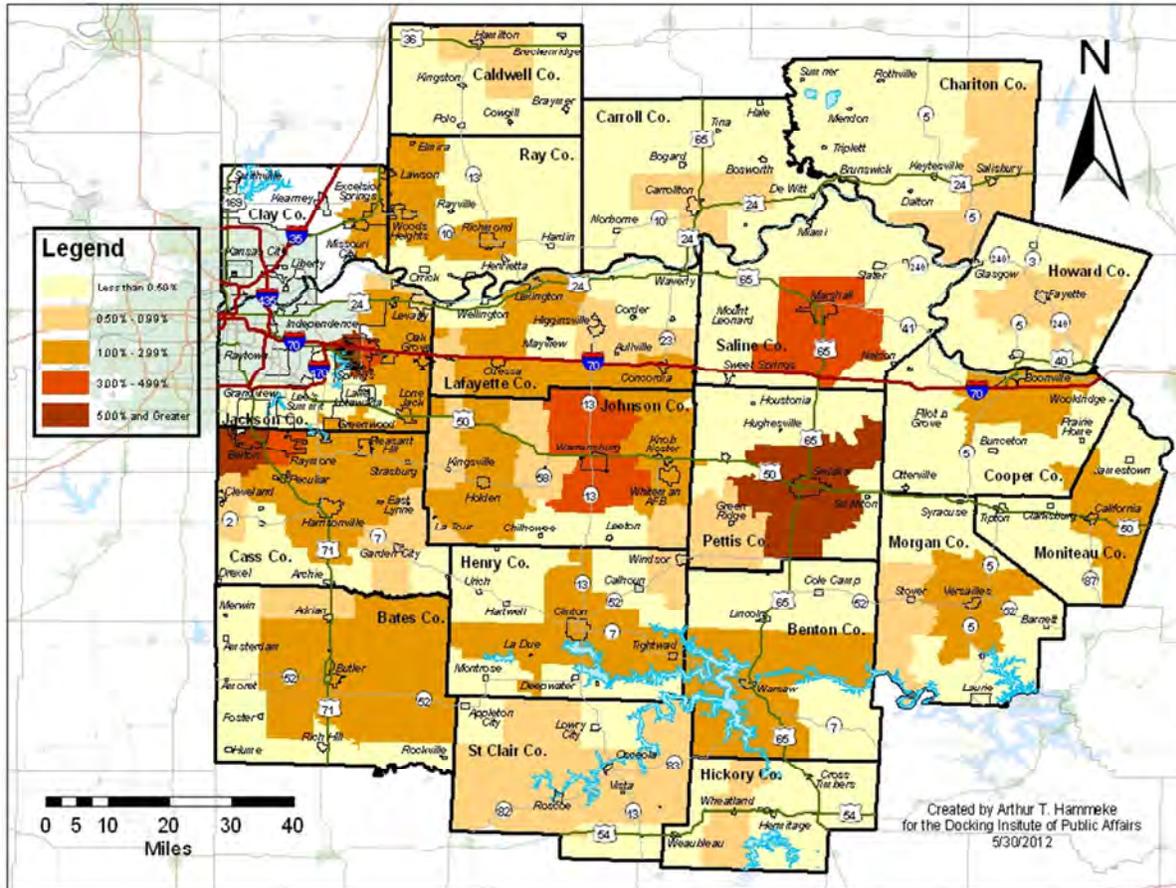


Table 1 shows the gender, age and education levels of the 149,840-member Available Labor Pool. About 55% percent are women, and the average age is about 46 years old. Most (94%) have at least a high school diploma, about two-thirds (63.2%) have **at least** some college education, and more than a quarter (27.8%) have **at least** a bachelor's degree.

Table 1: Age, Gender, and Education Levels of Available Labor Pool

Age	Age in 2011		
Range	18 to 76		
Average	47		
Median	46		
Gender	Number	Percent	
Female	82,641	55.2	
Male	67,199	44.8	
Extrapolated Total	149,840	100	
Highest Level of Education Achieved	Number	Percent	Cumulative Percent
Doctoral Degree	2,680	1.8	1.8
Masters Degree	15,998	10.7	12.5
Bachelors Degree	23,048	15.4	27.8
Associates Degree	21,075	14.1	41.9
Some College (including current students)	31,944	21.3	63.2
High School Diploma	46,159	30.8	94.0
Less HS Diploma	8,936	6.0	100
Extrapolated Total	149,840	100	
"Do you speak Spanish?"	Number	Percent	
"Yes"	31,327	20.9	
<i>Speak Very Well</i>	2,118	6.8	} <i>These percentages represent portions of 20.9%</i>
<i>Speak Fairly Well</i>	3,285	10.5	
<i>Speak Only a Little</i>	25,923	82.8	
		100	

Total numbers or percentages in table might not match those in text due to rounding.

Table 2 shows the various occupational categories of the 149,840-member Available Labor Pool. General labor occupations represent 14.5% of the entire Available Labor Pool, while high-skilled, blue-collar jobs make up 7.5%. Traditional service-related occupations represent 28.3% of the Available Labor Pool, while professional occupations represent 14.2% of the Available Labor Pool.

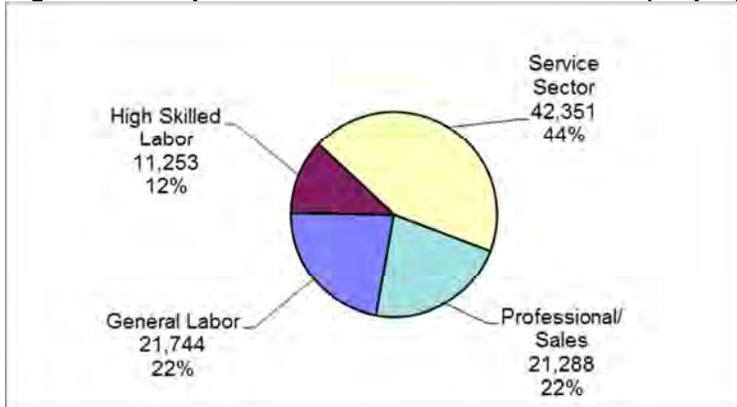
Table 2: Major Occupational Categories of Available Labor

	Number	Percent	Years at Job	
			Mean	Median
General Labor/Cleaning/Farm Labor/Delivery	10,191	6.8	11.5	6.0
Maintenance/Factory Work	7,115	4.7	11.1	7.7
Trucking/Heavy Equipment Operation	4,438	3.0	10.8	6.8
Total General Labor	21,744	14.5	11.1	6.8
Gov't Service/Protective Service	3,230	2.2	12.9	11.3
Technician/Mechanic/Welder	8,024	5.4	15.1	11.1
Total Highly-Skilled Labor	11,253	7.5	14.0	11.2
Customer Service/Receptionist/Food Service	9,879	6.6	8.5	5.0
Clerical/Secretarial	14,355	9.6	8.7	5.0
Social Service/Para-Professional/Nursing	9,857	6.6	9.2	5.0
Office Manager/Small Business Owner	8,260	5.5	10.8	9.0
Total Service Sector	42,351	28.3	9.3	6.0
Gov't & Business Professional/Sales	9,390	6.3	9.6	10.0
Educator/Counselor/Doctor/Attorney	11,898	7.9	13.8	11.0
Total Professional	21,288	14.2	11.7	10.5
Homemakers/Unemployed	23,167	15.5	n/a	n/a
Students	2,810	1.9	n/a	n/a
Retired/Disabled	27,227	18.2	n/a	n/a
Total Non-Employed	53,203	35.5		
Extrapolated Total	149,840	100		

Total numbers or percentages in table might not match those in text due to rounding.

Figure 2 shows the occupational sectors of the *employed members* of the Available Labor Pool only. The *percentages* shown in Figure 2 differ from those presented in Table 2 because the table includes non-working Available Labor Pool members. Appendix I provides a detailed list of occupations.

Figure 2: Occupational Sectors of Available Labor (Employed Only)



Current Skills and Work Experiences

To gain perspective on the types of workers that are available for new and/or different employment in the West Central Missouri Region, survey respondents were asked questions assessing work skills and previous work experience.

Table 3 and Figure 3 (next page) show the current employment status and previous work or training experience of Available Labor Pool members. Table 3 shows the number of workers currently employed in various job categories, as well as the number of workers that have previous work or training experience. The table also shows the sum of working Available Labor Pool members currently employed in a job category *plus* those that indicate previous training or experience in that particular field.

It is estimated, for example, that 8,178 members of the Available Labor Pool in the West Central Missouri Region are currently employed as general labor, construction, cleaners, and similar positions. An additional 14,739 Available Labor Pool members in the basin indicate previous employment experience or training in one of those jobs, for a total of 22,917 individuals.

Table 3: Current Work Experience plus Previous Work or Training Experience

	Current Employment*	Previous Work/Training*	Current plus Previous Work or Training**
	Number +	Number =	Number
General Labor/Construction/Cleaning	8,178	14,739	22,917
Farm Labor/Ranch Hand/Landscaping	1,274	1,849	3,123
Delivery/Driver/Courier	738	2,302	3,040
Maintenance/Wiring/Plumbing	3,574	3,409	6,983
Factory Worker/Grain Elevator Op/Meat Packer	3,541	11,400	14,941
Truck Driver/Heavy Equipment Operator	4,438	3,348	7,787
Police/Fire/Postal/Military Enlisted	3,230	6,654	9,883
Lab or Medical Technical/Comp Technician	3,398	3,642	7,040
Mechanic/Welder/Carpenter/Electrician	4,626	2,305	6,931
General Customer Service/Retail/Reception/Food Service	9,879	14,059	23,938
Clerical/Secretary/Book-Keeper/Bank Teller	14,355	13,467	27,822
Para-legal/Para-pro/CNA/Day Care	5,454	6,693	12,147
Nurse/LPN/RN/Semi-skilled Social Service	4,403	4,525	8,928
Office Manager/Small Business Owner	8,260	17,949	26,209
Teacher/Instructor/Writer/Researcher	7,919	6,934	14,853
Sales/Marketing/Accounting	5,773	2,543	8,316
Govt, Non-Profit, or Bus Exec/Farm Owner/Military Officer	3,617	2,391	6,008
Counselor/Social Worker/Physician's Assistant	795	246	1,041
Professor/Doctor/Engineer/Attorney	3,184	428	3,611
Extrapolated Total	96,637	118,882	

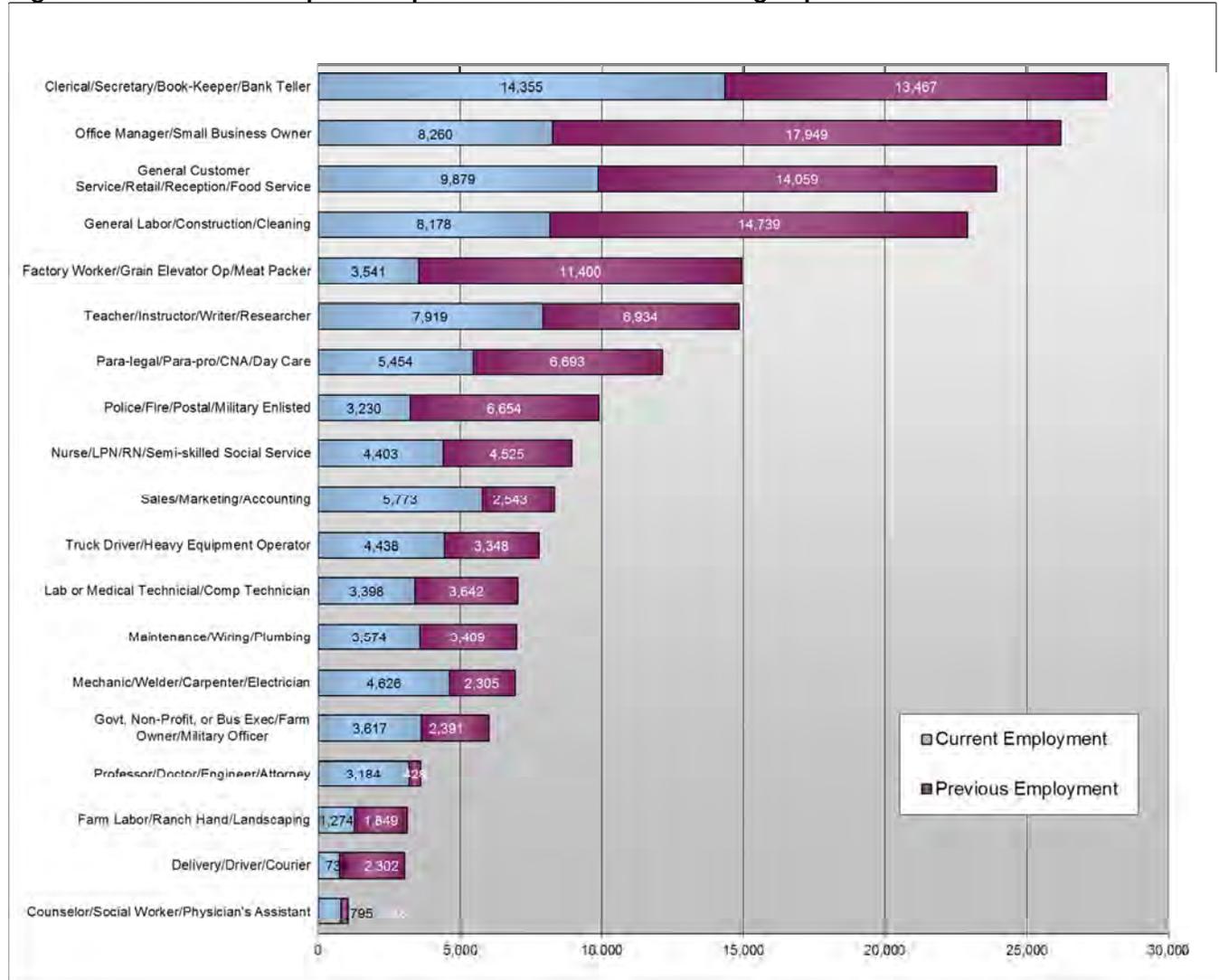
* Retired, disabled, non-working students, homemakers are not included.

** An individual member of the ALP is counted only once within each employment category.

Total numbers or percentages in table might not match those in text due to rounding.

Figure 3 shows the same information as that presented in Table 3, but in graphic format. Many Available Labor Pool members report current work experience or previous work/training as clerical workers, secretaries, book-keepers, bank tellers and similar positions that often require face-to-face interaction with the public and some quantitative skills. There are 14,355 working Available Labor Pool members currently employed in this category and 13,467 previously employed/trained in this category, for a total of 27,822 individuals.

Figure 3: Current Work Experience plus Previous Work or Training Experience



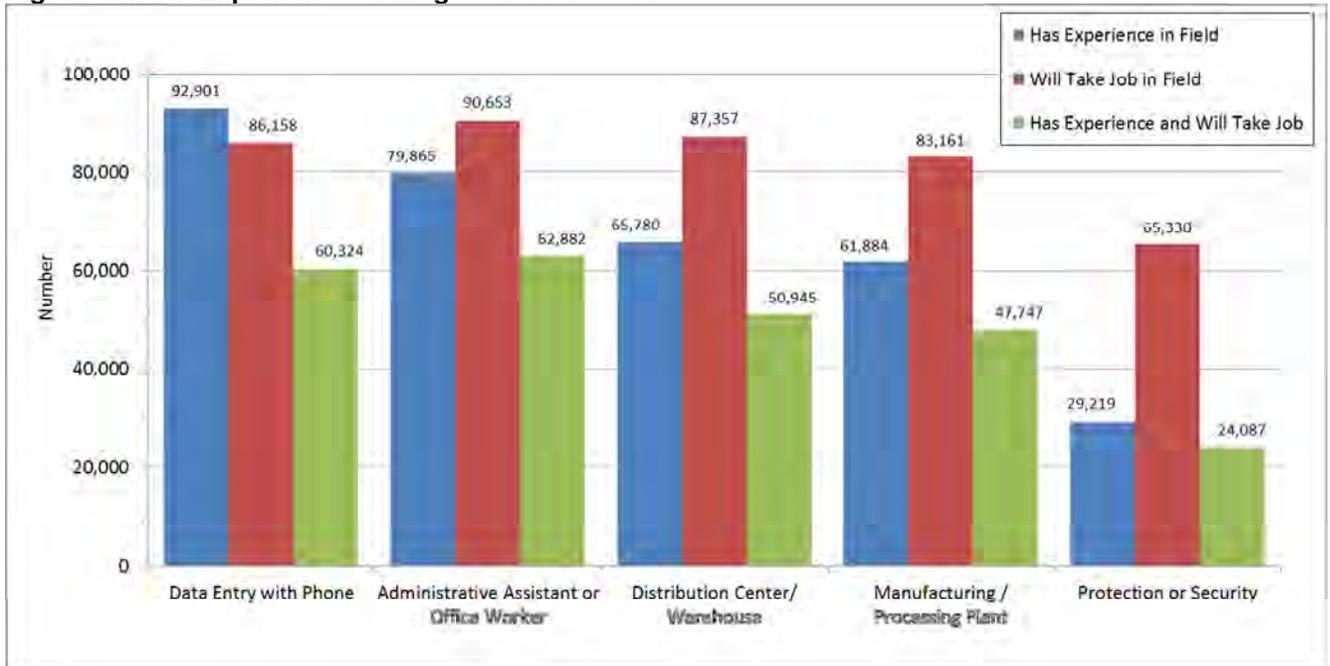
In addition to collecting data regarding the current employment status and previous work or training experience through a series of “open-ended” survey questions (the results of which are shown in the previous table and figure), respondents were asked about the five specific employment areas listed in Figure 4. Respondents were first asked if they had training or work experience in a specific field and then if they would take a job in that field regardless of their prior training or experience.

The figure indicates that an estimated 92,901 Available Labor Pool members report having training and/or experience in data entry with telephone operation, while fewer (86,158 individuals) would consider employment in that field. An estimated 79,865 members of the Available Labor Pool have training and/or experience in professional office environments as office workers or administrative assistants, while more (90,653 individuals) indicate that they would take a job in that field.

An estimated 65,780 members of the Available Labor Pool suggest that they have training or experience working in a distribution center or warehouse while 87,357 would consider a job in that field. An estimated 61,884 have experience working in a manufacturing plant or processing center while 83,161 would take a job in that field.

The third column shows the estimated number that have experience or training in a field **and** are willing to work in that field again.

Figure 4: Work Experience / Willing to Work in Field



Survey respondents who indicated that they had worked in manufacturing and processing and those that indicated that they had worked in distribution/warehousing were asked additional questions to assess the type of work they performed at those jobs. Figures 5 and 6 show the responses to those questions.

Figure 5: Work Experience in Manufacturing or Processing Plant

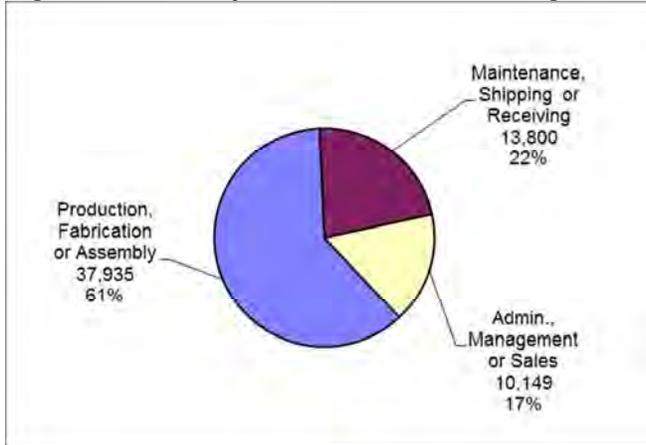
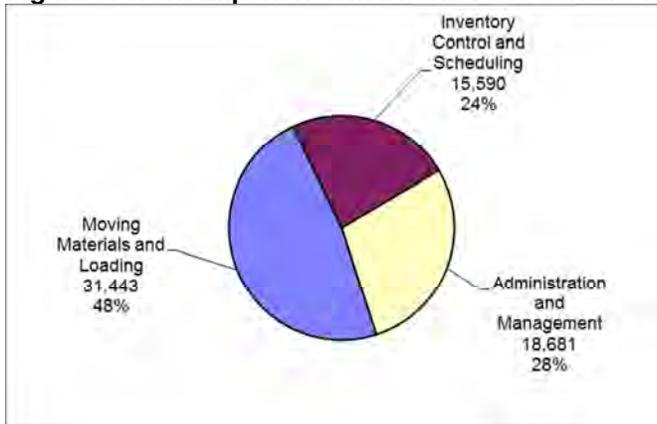


Figure 6: Work Experience in Distribution Center or Warehouse



Educational Experience

Respondents that had completed at least some college or are currently enrolled in a community college, college, or university were asked to provide their major area of study. Answer options included:

Social Sciences: Sociology, Psychology, Anthropology, Politics and Social Work.

Biological Sciences and Health: Biology, Agriculture, Nursing, Pre-med, Pre-vet and Human Performance.

Physical Sciences and Engineering: Physics, Geology, Chemistry and Engineering.

Business and Economics: Management, Accounting, Finance, Marketing and Economics.

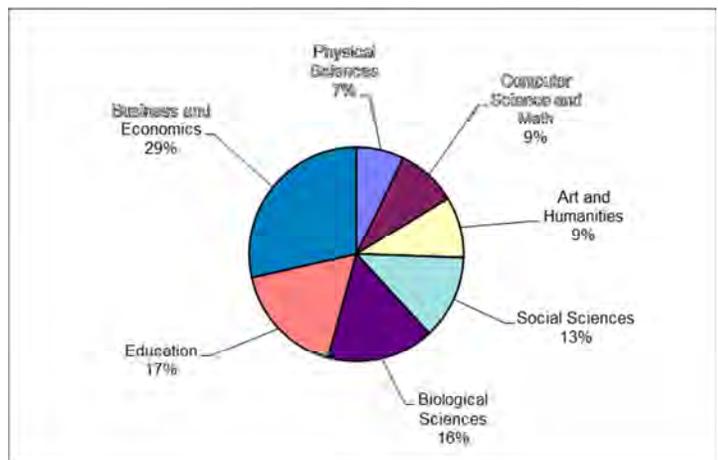
Education: Elementary and Secondary Teaching.

Computer Science and Math: Computer Programming or Technology, Networking, Web Design and Math.

Arts and Humanities: Art, Music, History, Philosophy and Languages.

Figure 7a shows that the largest groups of Available Labor Pool members indicate a major in business and economics (29%), education (17%), biological sciences or nursing (16%), social sciences (13%). Arts and humanities, computer science and math, and physical sciences follow with less than 10% each.

Figure 7a: Undergraduate College Major



Survey respondents with at least some college education were asked if they are attending or have attended a technical or community college. Figure 7b shows that 10% of these respondents have technical or community college experience.

Figure 7c shows the area of study for community college students. More than a quarter (28%) report studying nursing/health related subjects. Less than 10% are studying (or have studied) other manufacturing, information technology, automotive technology, computer assisted drafting (CAD) or computer assisted manufacturing (CAM) or office skills. Less than 1% percent report studying food processing or plastics manufacturing.

Figure 7b: Community College Experience

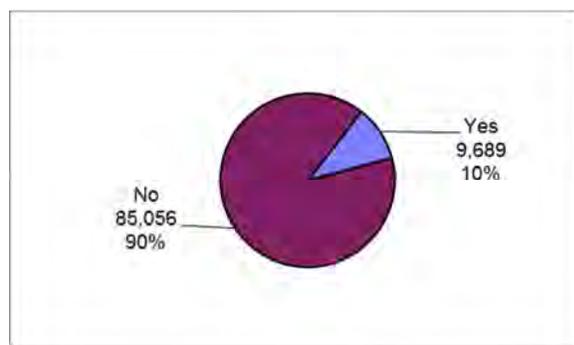
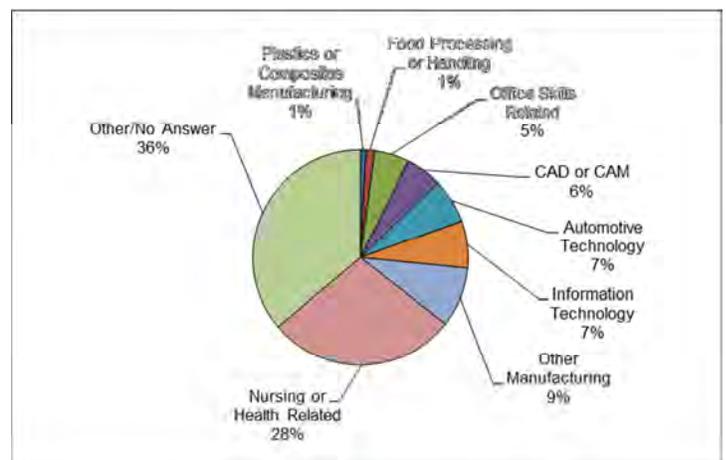


Figure 7c: Community College Study Area



Considerations for Employment

An important consideration for many employers looking to locate or expand operations is whether workers are willing to pursue new employment opportunities. Some workers may be available for new employment but are unwilling to switch from their current job to a different type of position. A large percentage of those unwilling to change their jobs, might limit the types of employers that can enter the labor basin. However, this does not seem to be the case in the West Central Missouri Labor Region. Figure 8 indicates that 126,611 (84%) members of the Available Labor Pool are willing to accept positions outside of their primary fields of employment.

Figure 8: Considerations for Employment

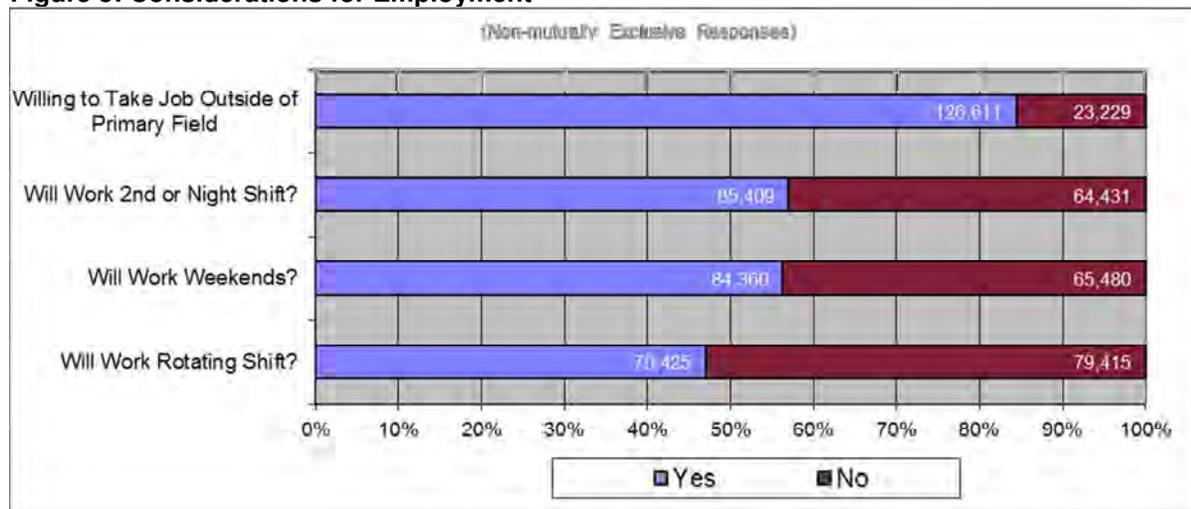
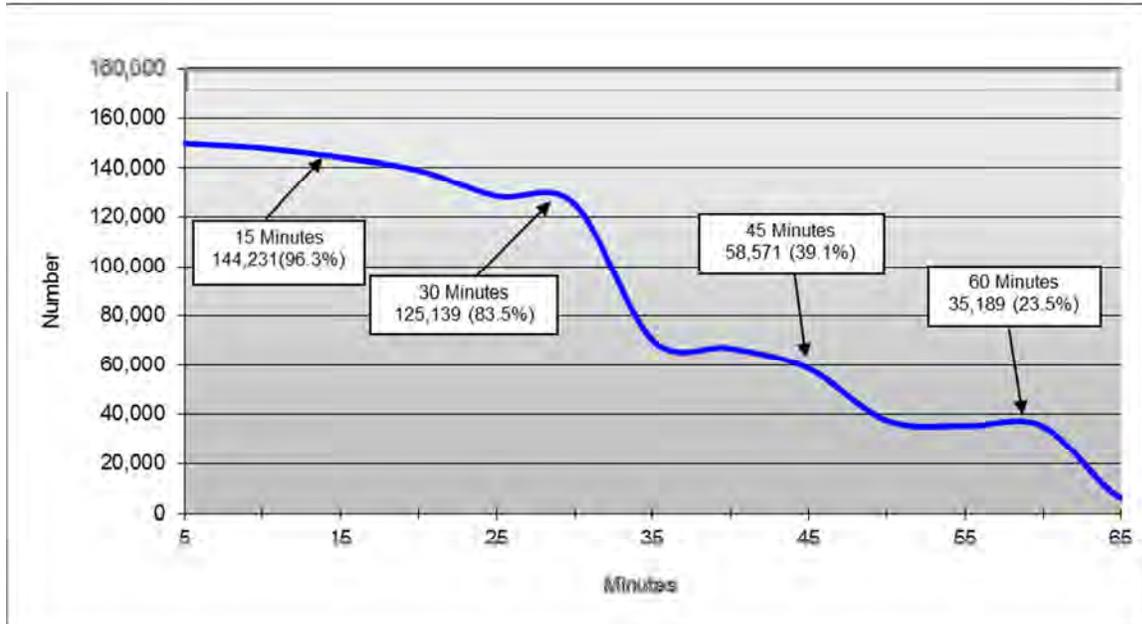


Figure 8 also shows responses to three questions regarding work shifts. Respondents were asked if they would be willing to work weekends, a second or night shift and rotating shifts.

The figure shows that about 57% of the Available Labor Pool indicates that they are willing to work second shifts or night shifts. Nearly as many, about 56%, indicate that they are willing to work weekends. Less than half of the respondents (47%) indicate that they are willing to work rotating shifts for a new or different job.

Another important consideration for many employers is whether workers are willing to commute for a new or different employment opportunity. Figure 9 suggest that the Available Labor Pool in the West Central Labor Region is open to commuting. More than a third (39.1%) of the members of the Available Labor Pool will commute up to 45 minutes, one way, for an employment opportunity, while 83.5% will commute up to 30 minutes for employment. Almost all (96.3%) will travel up to 15 minutes for employment.

Figure 9: Available Labor by Commute Minutes



Respondents were asked if the minutes they are willing to commute for work were influenced by gasoline prices. Figure 10a shows responses to a question asking “does the current price of gasoline greatly influence, somewhat influence, or not at all influence the number of minutes you are willing to commute for a new or different job?” The figure shows that almost half (49%) consider gas prices to “greatly influence” the commute minute estimate, while 34% consider gas prices to “somewhat influence” the estimate. About a sixth (16.5%) responded that gas prices do “not influence” the minutes willing to commute for a job.

Figure 10a: Influence of Gas Prices

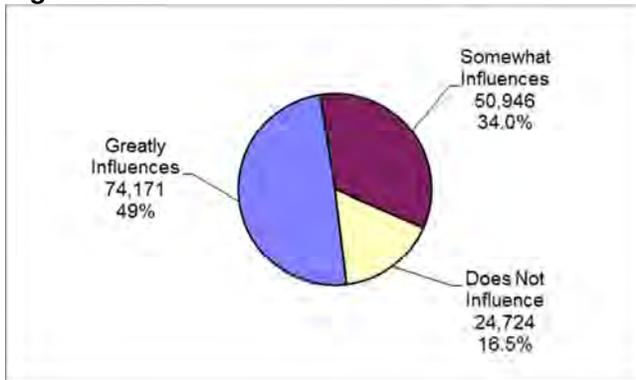
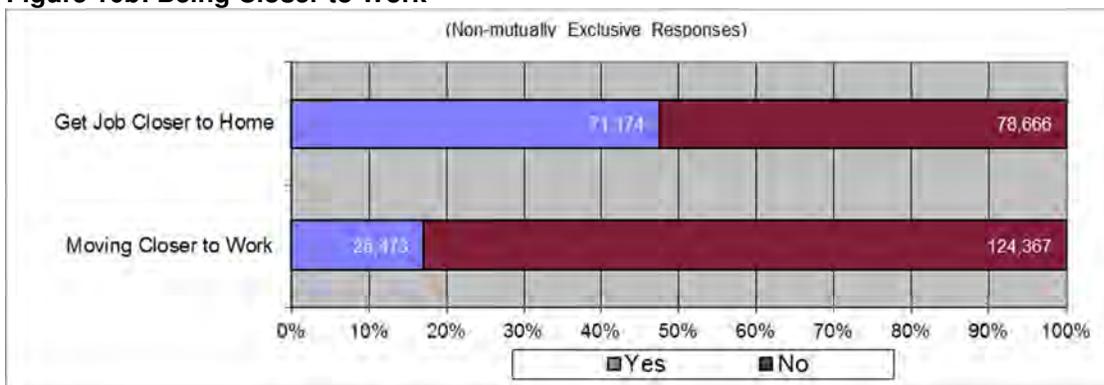


Figure 10b below shows responses to two questions: “Given the rising prices of gas, have you considered getting a job closer to your home?” and “Have you considered moving to be closer to your job?”

The figure shows that about 48% of the Available Labor Pool has considered getting a new job closer to their place of residence because of fuel prices. About 17% has considered relocating to be closer to work because of fuel prices.

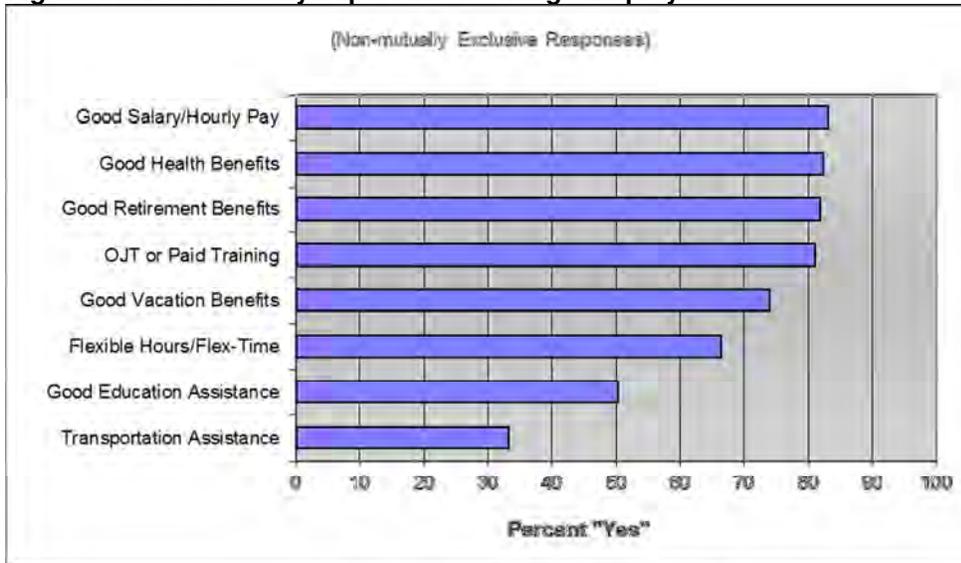
Figure 10b: Being Closer to Work



Available Labor Pool members were asked about various benefits that might be important for considering whether to take a new or different job. Respondents were asked if each benefit would be a “very important” consideration for taking a new job. Answer options included “yes” and “no.”

Figure 11 shows various benefits affecting the decisions of current workers to take a different job and potential workers to take a new job. The four most important benefits are, in order, good salary or hourly pay, good health benefits, good retirement benefits, and on-the-job or paid training. Each one of these benefits is considered “very important” by more than 80% Available Labor Pool each. Good vacation benefits follows closely with 74%. Flexible hours or flextime follows with 66%. The least desired benefits are good educational assistance and transportation assistance, which were considered “very important” by 50% and 33% Available Labor Pool members, respectively.

Figure 11: Benefits Very Important to Change Employment



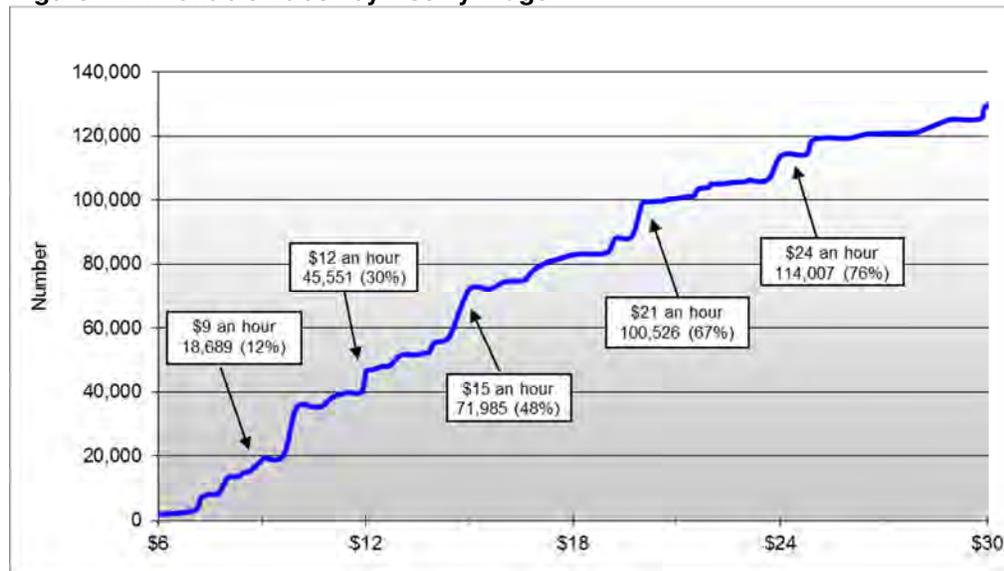
Wage Demands of Available Labor Pool

Wage demands are another important consideration for employers and economic developers. Figure 12 shows desired wages for members of the Available Labor Pool. It is estimated that 114,007 people (or 76% of the available labor) are interested in a new job at \$24 an hour².

An estimated 100,526 (or 67%) members of the labor pool are interested in new employment opportunities at \$21 an hour, while 71,985 (48%) are interested at \$15 an hour.

Finally, an estimated 45,551 people (30%) are interested in a new job at \$12 an hour and 18,689 (12%) at \$9 an hour.

Figure 12: Available Labor by Hourly Wage



The figure above suggests the obvious: that the higher the wage, the larger the pool of available labor. For example, 18,689 members of the Available Labor Pool are available for a new or different job at \$9.00 an hour. At \$10.00 an hour, the size of the available labor increases to 35,045 members. This represents an increase of 16,356 individuals.

The graph also highlights various “wage preference plateaus” that may be of interest to current and potential employers. A wage preference plateau is a situation in which an increase in wage results in a relatively insignificant or small increase in available labor. For example, 35,045 members of available labor are interested in a job at \$10.00 an hour. At \$10.50 an hour there are an estimated 35,377 individuals available. So, while there is certainly an increase in the number of available workers at this higher wage rate, the increase is estimated to be only 332 individuals. Additional wage plateaus can be seen between \$15 and \$16 (a 2,454-individual increase) and between \$18 and \$19 (a 739-individual increase).

² See Appendix II for an hourly wage/annual salary conversion chart.

Underemployment Among Available Labor Pool Workers

Underemployment — individuals possessing skills and/or training levels that exceed the responsibilities of their current job — is a significant issue in many communities. To assess underemployment in the West Central Missouri Region, *employed members of the Available Labor Pool* were presented with a scenario describing underemployment³. They were then asked a series of questions assessing if they perceived themselves as underemployed because: 1) their skill level is greater than their current job requires, 2) they possess higher levels of education than is required on the job, 3) they earned a higher income at a similar job previously, or 4) they were limited in the number of hours that they could work.

Of the 96,637 *employed members* of the Available Labor Pool (shown in Figure 13), slightly less than a third answered “yes” to one or more of the questions presented above and are considered underemployed. Figure 14 shows that the underemployed workers represent 32% (or 30,924 individuals) of the employed members of the Available Labor Pool.

Figure 13: Employed Members of the Available Labor Pool

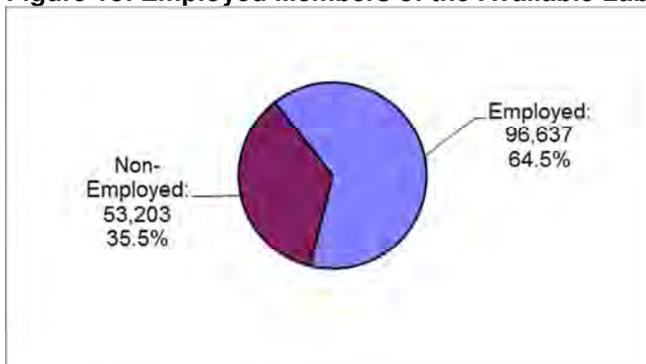
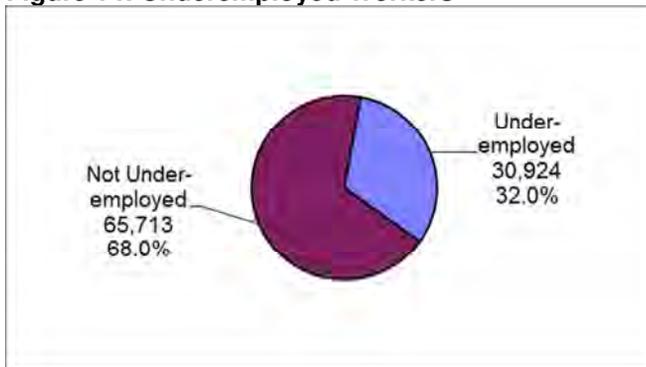


Figure 14: Underemployed Workers



³ “Because of circumstances, some workers have jobs that do not fully match their skills, education, or experiences. For example, a master plumber taking tickets at a movie theater would be a mismatch between skill level and job requirements. Do you consider yourself an underemployed worker because....?”

Figure 15 shows the percentages of the positive responses (i.e., “yes” answers) to the various measures of underemployment. About 23% of this subset of the had a previous but similar jobs that provided more income. About 22% considers themselves as underemployed because they possess education levels exceeding those needed for their current jobs. About 19% consider their skill levels as greater than their current jobs require, while about 13% suggest they are not able to work enough hours.

Figure 15: Reasons for Underemployment

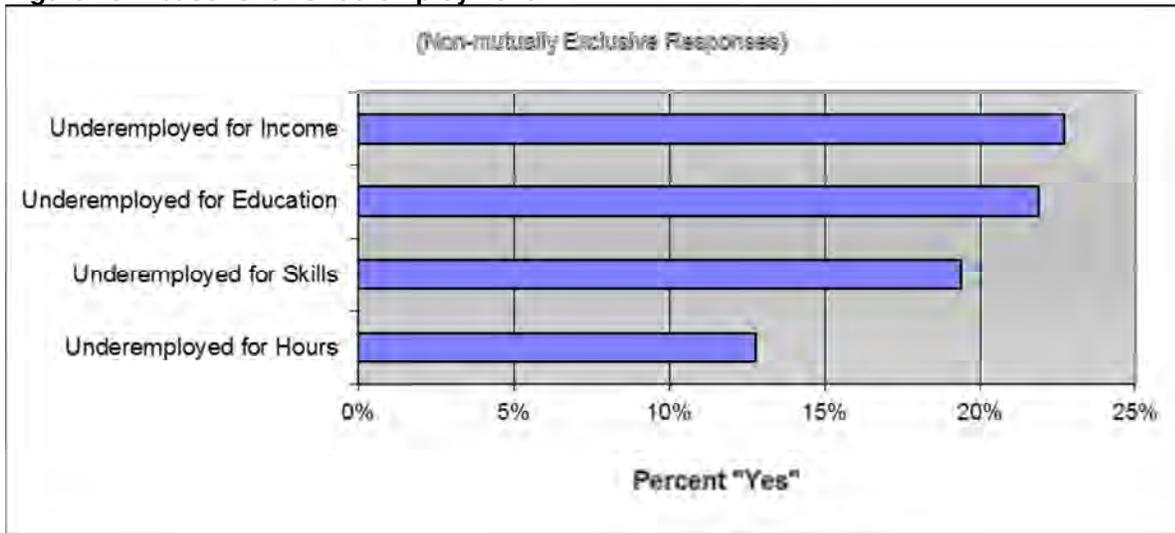


Table 4 and Figures 16 and 17 (next page) show some characteristics of the underemployed members of the Available Labor Pool. Table 4 indicates that the education level of the underemployed workers compares favorably to the overall Available Labor Pool with about 70% having **at least** some college education and almost 46% having completed associates degrees. (Table 1 shows that 63% of the entire Available Labor Pool has some college experience and about 42% have completed an associate’s degree).

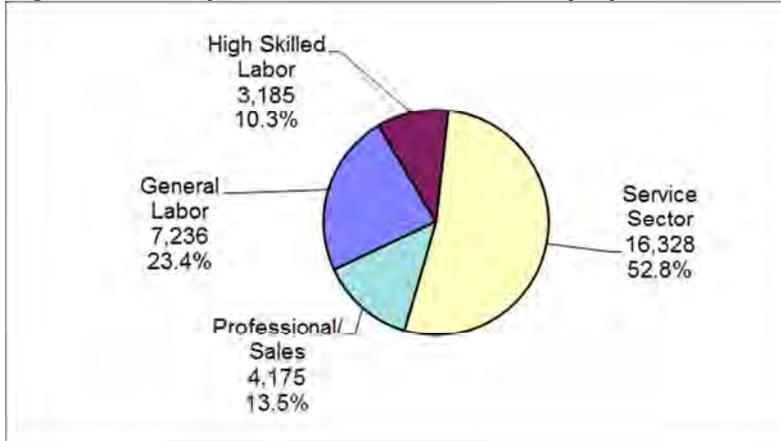
Table 4: Highest Level of Education Achieved Among Underemployed

	Number	Percent	Cumulative Percent
Doctoral Degree	557	1.8	1.8
Masters Degree	2,474	8.0	9.8
Bachelors Degree	6,247	20.2	30.0
Associates Degree	4,886	15.8	45.8
Some College	7,669	24.8	70.6
High School Diploma Only	7,607	24.6	95.2
Less HS Diploma	1,484	4.8	100
Extrapolated Total	30,924	100	

Total numbers or percentages in table might not match those in text due to rounding.

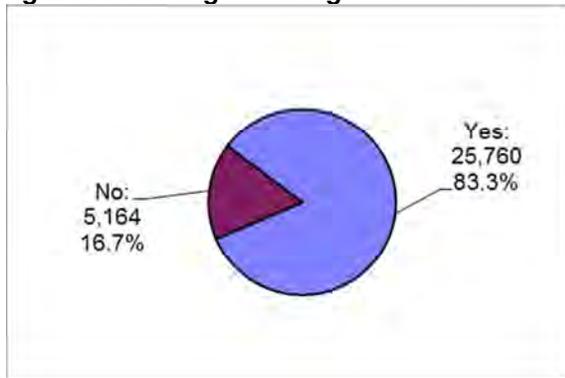
Figure 16 shows that 23.4% of the underemployed workers are employed as general laborers and 10.3% are employed as skilled, blue-collar workers. The largest percentage of underemployed workers is employed as service sector and support workers (52.8%), while fewer (13.5%) hold professional positions.

Figure 16: Occupational Sectors of Underemployed Workers



Respondents indicating that they were underemployed were also asked a follow-up question addressing the willingness to change jobs in order for them to better utilize their skills and/or education. Figure 17 suggests that many – 83.3% (or 25,760 individuals) – of the underemployed workers are willing to change jobs to address underemployment.

Figure 17: Willing to Change Job to Better Use Skills/Education



Comparative Analysis (2005, 2009 and 2012 Reports)

The Docking Institute of Public Affairs conducted a similar labor studies in the West Central Missouri Region and provided reports in 2005 and 2009. This section of the report compares some of the data collected for the 2005, 2009 and 2012 labor study reports.

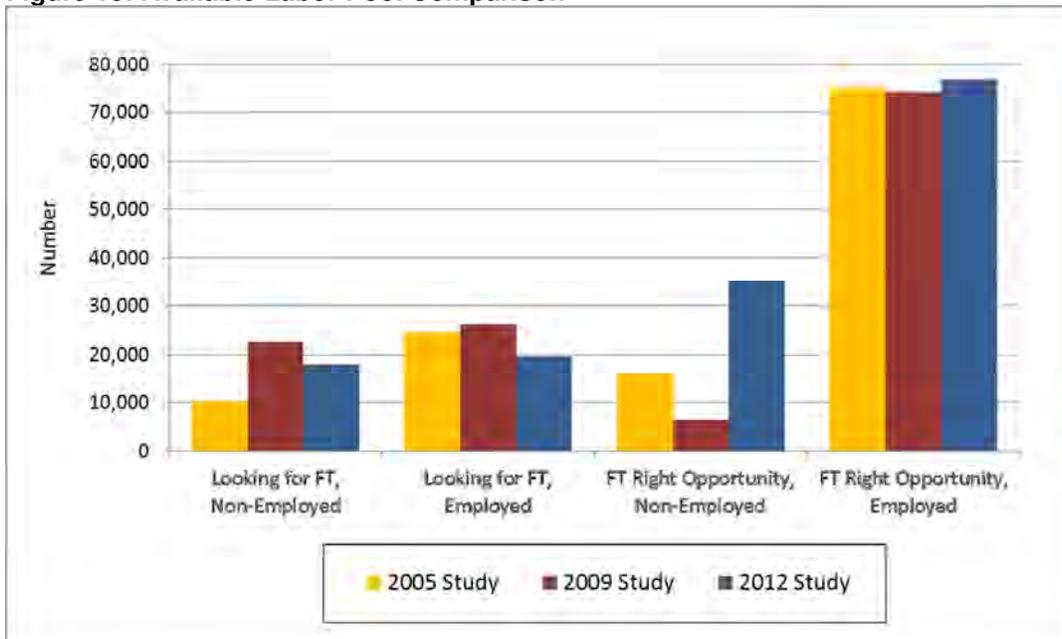
Table 5 shows population, civilian labor force, employment, and the Available Labor Pool data presented in the 2005, 2009 and 2012 reports. Total population within the West Central Missouri Region has increased from 444,038 to 511,627, the Civilian Labor Force increased from 227,279 to 246,603, and the number of employed individuals has increased from 214,532 to 222,708. The unemployment rate increased from 5.8% to 9.7%.

Table 5: Population, CLF, Employed, Available Labor Pool, and Unemployment Rate Comparisons

West Central Missouri Labor Region			
	2005 Study	2009 Study	2012 Study
Labor Basin Population	444,038	491,086	511,627
Civilian Labor Force	227,279	245,925	246,603
Employed	214,532	230,619	222,708
Unemployment Rate	5.8%	6.5%	9.7%
Available Labor Pool	126,278	129,694	149,840

Figure 18, below, shows the Available Labor Pool for the West Central Missouri Region in 2005, 2009 and 2012. The figure shows that there is a much larger proportion of *non-employed* Available Labor Pool members *available for full-time employment* in 2012 than in 2009 and 2005, while a smaller proportion of *employed* Available Labor Pool members are *looking for* in 2012 than in 2005 or 2009.

Figure 18: Available Labor Pool Comparison



An occupation and education level comparison is shown in Table 6. In many ways, the occupational structure of 2012 looks similar to 2005, with the exceptions of a rise in the percentage of non-working Available Labor Pool members from 20.6% in 2005 to 35.5% in 2012 and a decrease in the percentage of available professional workers from 22.9% in 2005 to 14.2% in 2012.

The education levels of the Available Labor Pool with bachelor's degree and higher stayed relatively stable from 2005 to 2012, although 27.8% hold bachelor's degrees (at least) in 2012 compared to 25.1% in 2005.

The percentage of Available Labor Pool members with associate's degrees increased from 9.3% in 2009 to 14.1% in 2012, while available labor pool members with "some college" decreased from 30.7% in 2009 to 21.3% in 2012.

Table 6: Available Labor Pool Occupation and Education Levels Comparison

<i>Labor Sector</i>	2005 Study		2009 Study		2012 Study				
	Number	Percent	Number	Percent	Number	Percent			
General Labor	27,758	22.0	26,214	20.2	21,744	14.5			
High Skill Labor	8,899	7.0	11,355	8.8	11,253	7.5			
Service Sector	34,666	27.5	43,157	33.3	42,351	28.3			
Professional	28,980	22.9	21,445	16.5	21,288	14.2			
Non-Working	25,975	20.6	27,523	21.2	53,203	35.5			
Total	126,278	100	129,694	100	149,840	100			
<i>Highest Education</i>	Number	Percent	Cumulative Percent	Number	Percent	Cumulative Percent	Number	Percent	Cumulative Percent
Doctoral Degree	809	0.6	0.6	2,558	2.0	2.0	2,680	1.8	1.8
Masters Degree	11,368	9.0	9.6	12,286	9.5	11.4	15,998	10.7	12.5
Bachelors Degree	19,537	15.5	25.1	22,372	17.2	28.7	23,048	15.4	27.8
Associates Degree	11,464	9.1	34.2	11,999	9.3	27.9	21,075	14.1	41.9
Some College	36,634	29.0	63.2	39,793	30.7	68.6	31,944	21.3	63.2
High School Diploma	39,687	31.4	94.6	34,645	26.7	95.3	46,159	30.8	94.0
Less HS Diploma	6,779	5.4	100	6,040	4.7	100	8,936	6.0	100
Total	126,278	100		129,693	100		149,840	100	

Data from the 2005, 2009 and 2012 studies shows that the percentage of the Available Labor Pool indicating they are willing to take a job outside their primary field fluctuated slightly - falling about 2.5% from 2005 to 2012 (see Table 7).

Table 7: Willing to Take Job Outside of Primary Field

	2005 Study		2009 Study		2012 Study	
	Number	Percent	Number	Percent	Number	Percent
Yes	109,862	87.0	108,035	83.3	126,611	84.5
No	16,416	13.0	21,659	16.7	23,229	15.5
Total	126,278	100	129,694	100	149,840	100

Totals might not sum precisely due to rounding.

Figure 19 shows a comparison of “willingness to commute” for the three studies. The patterns are similar, while the 2012 Available Labor Pool is larger. The figure shows that the data from the three study groups begin to converge at about 35 minutes.

Figure 19: Available Labor by Commute Minutes Comparison

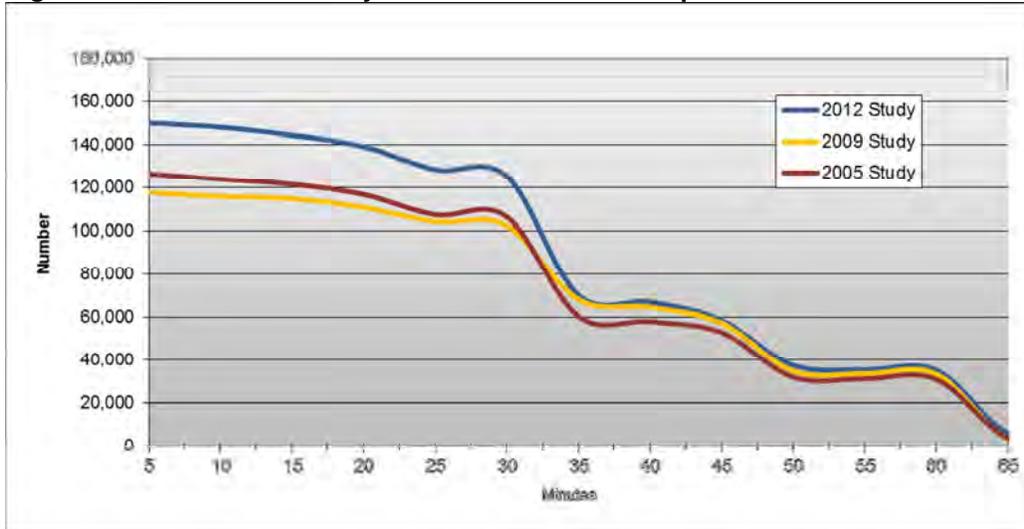


Table 8 shows desired benefits to take a new or a different job for each labor study, ranked in order by 2012 data. The table shows that “good salary/hourly pay” is the most important benefit in 2012, as it was in 2009. This item ranked fourth in 2005.

The highest ranking item in 2005 was “on-the-job (OJT) training or paid training,” with 88% of the respondents indicating this was an important benefit to take a new job. This item ranked third in 2009 and fourth in 2012.

Table 8: Importance of Benefits to Change Employment Comparison

	2005 Study	2009 Study	2012 Study	Change ('12-'09)
(Ranked by 2012 Study)	<i>Percent Responding "Yes"</i>			
Good Salary/Hourly Pay	81.9	88.8	83.1	-5.7
Good Health Benefits	87.3	87.3	82.3	-5.0
Good Retirement Benefits	86.7	84.7	81.8	-2.9
OJT or Paid Training	88.0	86.7	81.0	-5.7
Good Vacation Benefits	78.9	79.3	74.0	-5.3
Flexible Hours/Flex-Time	69.7	70.6	66.3	-4.3
Good Education Assistance	64.8	52.2	50.2	-2.0
Transportation Assistance	n/a	33.0	33.2	

Figure 20 shows a comparison of the wage demands of the three study groups. The wage demand line shows that a larger proportion of the 2005 Available Labor Pool members were available for work in the lower dollar per hour range (\$10 to 15% an hour or so) when compared to the 2009 and 2012 labor pools.

Figure 20: Comparison of Wage Demands of the Willing-to-Commute

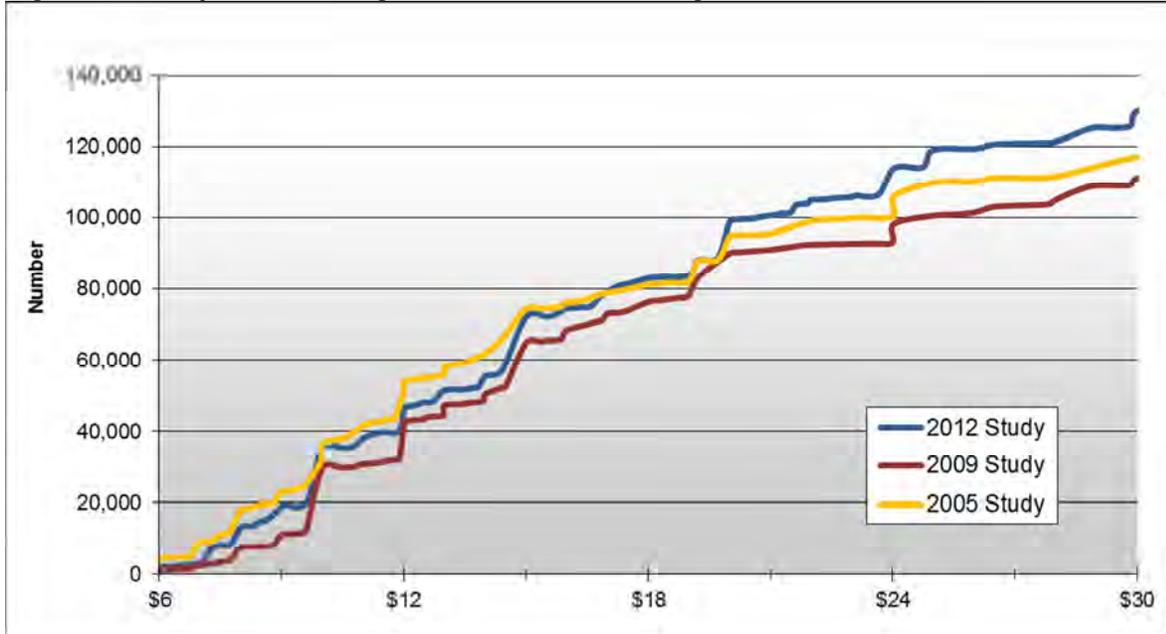


Table 9 shows a comparison of the underemployed members of the Available Labor Pools for 2005, 2009 and 2012. The number and percentage of underemployed workers in 2005 (47,822 and 47.6%) are larger than in 2009 and 2012 primarily because the 2005 underemployment section included Available Labor Pool members seeking part-time employment. The underemployment sections in the 2009 and 2012 studies focused on respondents seeking full-time employment.

The percentages of underemployed workers by labor sector are similar among all three studies, with some variation. For example, the percentage of underemployed service sector workers decreased from 46.3% in 2005 to 45.2% in 2009 but then increased to 52.8% in 2012.

Examining the cumulative percentage columns in the educational attainment (Highest Education) section of the table shows that 45.8% of the underemployed workers in 2012 had at least associates degrees, while these percentages are lower for 2005 and 2009 (at 37.5% and 36.2%, respectively).

Table 9: Underemployed Workers and Education Level Comparison

	2005 Study		2009 Study		2012 Study				
	Number	Percent	Number	Percent	Number	Percent			
Employed of ALP	100,303	79.4	91,189	77.6	96,637	64.5			
Underemployed Wrkrs	47,822	47.6	29,183	32.0	30,924	32.0			
Will Change Jobs to Address Status	41,755	87.3	24,602	84.3	25,760	83.3			
Labor Sector									
	Number	Percent	Number	Percent	Number	Percent			
General Labor	12,260	25.6	7,938	27.2	7,236	23.4			
High Skill Labor	5,965	12.5	3,794	13.0	3,185	10.3			
Service Sector	22,118	46.3	13,191	45.2	16,328	52.8			
Professional	7,479	15.6	4,261	14.6	4,175	13.5			
Total	47,822	100	29,184	100	30,924	100			
Highest Education									
	Number	Percent	Cumulative Percent	Number	Percent	Cumulative Percent	Number	Percent	Cumulative Percent
Doctoral Degree	452	0.9	0.9	603	2.1	2.1	557	1.8	1.8
Masters Degree	3,853	8.1	9.0	1,776	6.1	8.2	2,474	8.0	9.8
Bachelors Degree	8,990	18.8	27.8	4,514	15.5	23.6	6,247	20.2	30.0
Associates Degree	4,654	9.7	37.5	3,683	12.6	36.2	4,886	15.8	45.8
Some College	14,625	30.6	68.1	9,054	31.0	67.3	7,669	24.8	70.6
High School Diploma	13,379	28.0	96.1	8,483	29.1	96.3	7,607	24.6	95.2
Less HS Diploma	1,869	3.9	100	1,069	3.7	100	1,484	4.8	100
Total	47,822	100		29,182	100		30,924	100	
Totals might not sum precisely due to rounding.									

Methodology

The West Central Missouri Region has a total population of approximately 511,627, and a Civilian Labor Force (CLF) of 246,603. The unemployment rate is 9.68%. The Docking Institute's analysis suggests that the basin contains an Available Labor Pool (Available Labor Pool) of 149,840 individuals.

Explaining the Civilian Labor Force

Traditional methods of assessing the dynamics of the labor force have concentrated on what the Bureau of Labor Statistics (BLS) calls the Civilian Labor Force (CLF). The CLF represents "the civilian non-institutional population, 16 years of age and over classified as employed or unemployed." The BLS defines "non-institutional civilians" as those individuals who are not inmates in institutions and who are not on active duty in the Armed Forces; and "unemployed civilians" as civilians available for work and who had "made specific efforts to find employment" in the previous four weeks.

While a review of CLF statistics represents the starting point for understanding the labor force in the West Central Missouri Region, there are some limitations associated with these statistics. These limitations occur because the CLF *excludes* individuals who may be willing and able to be gainfully employed but have not made specific efforts to find employment in the last four weeks. These individuals may include full-time students, homemakers, the unemployed who are no longer seeking employment, military personnel who may be leaving military employment in the near future and retired individuals who may be available for work but have not been looking for work recently.

In addition, most new employers draw their workforce from those who are presently employed, not those who are unemployed. As such, Census-based and BLS data (such as the CLF) do not specifically address the possibility of workers moving from one industry to another in search of other employment opportunities.

Defining the Available Labor Pool

An alternative to the CLF is the "Available Labor Pool⁴." The Available Labor Pool is composed of workers categorized as either 1) currently not working *but* looking for employment, 2) currently employed (full- or part-time) *and* looking for other full-time employment, 3) currently not working in any manner *but* willing to consider different employment for the *right opportunity*, and 4) currently employed and not looking, *but* willing to consider different employment for the *right opportunity*.

There are two key differences between the Civilian Labor Force and the Available Labor Pool. First, the Available Labor Pool methodology expands the pool of potential workers by including workers excluded from the CLF⁵. Secondly, the number of potential workers is then *restricted* to

⁴ The Available Labor Pool includes potential workers excluded from the CLF (such as full-time students willing to take a job, homemakers who have not yet sought employment, military personnel who may be leaving military employment in the near future, and retired individuals who may be willing and able to be gainfully employed).

⁵ The number that is added to the Civilian Labor Force is derived by taking from the survey the total number of full-time students, homemakers, military, retirees, and long-term unemployed, who state that they are seeking or available for employment and are within a reasonable commute distance to the center of the labor basin, and dividing

those workers who indicate they are looking for work or that are available for new employment. The advantage of this methodology is that it allows researchers to examine those members of the labor pool who have a propensity to consider a job opportunity given their employment expectations. Even with these restrictions, it should be noted that, in practice, not all members of the Available Labor Pool would apply for a new job opportunity. However, the Available Labor Pool figure for a labor basin reveals to current employers and potential employers better information about the quantity and quality of the labor pool than do Civilian Labor Force data and unemployment statistics. The Available Labor Pool for the West Central Missouri Region includes 149,840 individuals. This represents a substantial number of workers and potential workers for employers to draw upon in the West Central Missouri Region.

Description of Survey Research Methods

Data for the **2012 study** were collected from a random digit telephone survey⁶ of adults living in twenty counties in west central Missouri: Bates, Benton, Caldwell, Carroll, Cass, Chariton, Clay, Cooper, Henry, Hickory, Howard, Jackson, Johnson, Lafayette, Moniteau, Morgan, Pettis, Ray, Saline, and St. Clair. Surveying took place from July 28 to November 18, 2011, using a Computer Assisted Telephone Interviewing (CATI) system. A total of 4,379 households were successfully contacted during the data collection period, and a randomly selected adult in each was asked to participate in the study. In 2,219 households the selected adult agreed to be interviewed. This represents a cooperation rate of 51% and a margin of error of +/-2.08%.

Survey respondents that were 65 years of age or older, retired and not interested in a new or different job were not asked the entire battery of survey questions and are not included in the analysis of this report. The remaining respondents (all other working and non-working respondents) total to 1,407, and are considered eligible respondents. Of the 1,407 cooperating and eligible respondents, 50% (or 703) indicated that they were available for new or different full-time employment and/or were looking for a new or different full-time job. This subgroup is considered the Available Labor Pool for the West Central Missouri Region. The margin of error for the Available Labor Pool is +/- 3.70%.

Data for the **2009 study** were collected using the same methods as described for the 2012 study. Surveying took place from October 14 to December 15, 2008, using a Computer Assisted Telephone Interviewing (CATI) system. A total of 4,247 households were successfully contacted during the data collection period, and a randomly selected adult⁷ in each was asked to participate in the study. In 2,361 households the selected adult agreed to be interviewed. This represents a cooperation rate of 59% and a margin of error of +/-2.1%.

this number by the total number of respondents. This quotient is then multiplied by the total number of people in the labor basin who are 18 to 65 years old.

⁶ The telephone numbers were assembled by randomly generating suffixes within specific area codes and prefixes. As such, unlisted numbers were included in this sample, minimizing the potential for response bias. Known business, fax, modem, and disconnected numbers were screened from the sample in efforts to reach households only (and to minimize surveyor dialing time).

Up to eight attempts were made to contact each respondent during three calling periods (10 AM to Noon, 2 PM to 4 PM, and 6 PM to 9 PM). Initial refusals were re-attempted by specially trained "refusal converters," which aided in the cooperation rate.

⁷ Surveyors requested to "speak with an adult over the age of 17 that has had the most recent birthday."

Survey respondents that were 65 years of age or older, retired and not interested in a new or different job were not asked the entire battery of survey questions. The remaining respondents (all other working and non-working respondents) total to 1,177 and are considered eligible respondents. Of the 1,177 cooperating and eligible respondents, 37.5% (or 446) indicated that they were available for new or different full-time employment and/or were looking for a new or different full-time job. This subgroup is considered the Available Labor Pool for the West Central Missouri Region. The margin of error for the Available Labor Pool is +/- 4.6%.

Data for the **2005 study** were collected from a random digit telephone survey of adults living in 17 counties (Bates, St. Clair, Hickory, and Camden were not added until the 2009 study). Surveying took place from June 20, 2005 to August 4, 2005, using the same CATI system. A total of 3,061 households were successfully contacted during the data collection period, and a randomly selected adult in 1,864 household agreed to be interviewed. The cooperation rate for the 2005 study was 61%, with a margin of error of +/-2.27%.

Survey respondents that were 65 years of age or older, retired and not interested in a new or different job were not asked the entire battery of survey questions. The remaining respondents (all other working and non-working respondents) total to 1,149, and were considered eligible respondents. Of the 1,149 cooperating and eligible respondents, 49% (or 573) indicated that they were available for new or different full-time employment and/or were looking for a new or different full-time job. This subgroup is considered the Available Labor Pool for the West Central Missouri Region in 2005. The margin of error for the 2005 Available Labor Pool is +/- 4.09%.

The study sponsors and Institute personnel agreed upon the survey items used, with the former identifying the study objectives and the latter developing items and methodologies that were valid, reliable, and unbiased. Question wording and design of the survey instrument are the property of the Docking Institute. A detailed summary of the method of analysis used in this report can be found in Joseph A. Aistrup, Michael S. Walker, and Brett A. Zollinger, "The Kansas Labor Force Survey: The Available Labor Pool and Underemployment." *Kansas Department of Human Resources*, 2002.

Appendix I: Current Employment Status of Available Labor Pool

	Current Employment Status of ALP	
	Number	Percent
General Labor/Construction/Cleaning	8,178	5.46
Farm Labor/Ranch Hand/Landscaping	1,274	0.85
Delivery/Driver/Courier	738	0.49
Maintenance/Wiring/Plumbing	3,574	2.39
Factory Worker/Grain Elevator Op/Meat Packer	3,541	2.36
Truck Driver/Heavy Equipment Operator	4,438	2.96
Police/Fire/Postal/Military Enlisted	3,230	2.16
Lab or Medical Technical/Comp Technician	3,398	2.27
Mechanic/Welder/Carpenter/Electrician	4,626	3.09
Other Blue Collar	0	0.00
General Customer Service/Retail/Reception/Food Service	9,879	6.59
Clerical/Secretary/Book-Keeper/Bank Teller	14,355	9.58
Para-legal/Para-pro/CNA/Day Care	5,454	3.64
Nurse/LPN/RN/Semi-skilled Social Service	4,403	2.94
Office Manager/Small Business Owner	8,260	5.51
Teacher/Instructor/Writer/Researcher	7,919	5.28
Sales/Marketing/Accounting	5,773	3.85
Govt, Non-Profit, or Bus Exec/Farm Owner/Military Officer	3,617	2.41
Counselor/Social Worker/Physician's Assistant	795	0.53
Professor/Doctor/Engineer/Attorney	3,184	2.12
Other White Collar	0	0.00
Homemaker	10,035	6.70
Full-Time Student	2,810	1.88
Unemployed	13,132	8.76
Retired	22,403	14.95
Disabled	4,823	3.22
Extrapolated Total	149,840	100

Total numbers or percentages in table might not match those in text due to rounding.

Appendix II: Hourly Wage to Annual Salary Conversion Chart

Hourly Wage	Annual Salary	Hourly Wage	Annual Salary
\$5.00	\$10,400		
\$5.50	\$11,440		
\$6.00	\$12,480		
\$6.50	\$13,520		
\$7.00	\$14,560		
\$7.50	\$15,600		
\$8.00	\$16,640		
\$8.50	\$17,680		
\$9.00	\$18,720		
\$9.50	\$19,760		
\$10.00	\$20,800		
\$10.50	\$21,840		
\$11.00	\$22,880		
\$11.50	\$23,920		
\$12.00	\$24,960		
\$12.50	\$26,000		
\$13.00	\$27,040		
\$13.50	\$28,080		
\$14.00	\$29,120		
\$14.50	\$30,160		
\$15.00	\$31,200		
\$15.50	\$32,240		
\$16.00	\$33,280		
\$16.50	\$34,320		
\$17.00	\$35,360		
\$17.50	\$36,400		
\$18.00	\$37,440		
\$18.50	\$38,480		
\$19.00	\$39,520		
\$19.50	\$40,560		
\$20.00	\$41,600		
\$20.50	\$42,640		
\$21.00	\$43,680		
\$21.50	\$44,720		
\$22.00	\$45,760		
\$22.50	\$46,800		
\$23.00	\$47,840		
\$23.50	\$48,880		
\$24.00	\$49,920		
\$24.50	\$50,960		
\$25.00	\$52,000		
\$25.50	\$53,040		
\$26.00	\$54,080		
\$26.50	\$55,120		
\$27.00	\$56,160		
\$27.50	\$57,200		
\$28.00	\$58,240		
\$28.50	\$59,280		
\$29.00	\$60,320		
\$29.50	\$61,360		
		\$30.00	\$62,400
		\$30.50	\$63,440
		\$31.00	\$64,480
		\$31.50	\$65,520
		\$32.00	\$66,560
		\$32.50	\$67,600
		\$33.00	\$68,640
		\$33.50	\$69,680
		\$34.00	\$70,720
		\$34.50	\$71,760
		\$35.00	\$72,800
		\$35.50	\$73,840
		\$36.00	\$74,880
		\$36.50	\$75,920
		\$37.00	\$76,960
		\$37.50	\$78,000
		\$38.00	\$79,040
		\$38.50	\$80,080
		\$39.00	\$81,120
		\$39.50	\$82,160
		\$40.00	\$83,200
		\$40.50	\$84,240
		\$41.00	\$85,280
		\$41.50	\$86,320
		\$42.00	\$87,360
		\$42.50	\$88,400
		\$43.00	\$89,440
		\$43.50	\$90,480
		\$44.00	\$91,520
		\$44.50	\$92,560
		\$45.00	\$93,600
		\$45.50	\$94,640
		\$46.00	\$95,680
		\$46.50	\$96,720
		\$47.00	\$97,760
		\$47.50	\$98,800
		\$48.00	\$99,840
		\$48.50	\$100,880
		\$49.00	\$101,920
		\$49.50	\$102,960
		\$50.00	\$104,000