

COMMUNITY AND WORKFORCE PROFILE



HOLTS SUMMIT/CALLAWAY COUNTY, MISSOURI AREA OF INFLUENCE AND LABOR MARKET



Research Conducted and Prepared by:

THE GROWTH SERVICES GROUP

P.O. Box 105093
Jefferson City, MO 65110
(573) 635-7723 • Fax (573) 761-4871
www.growthservices.org

POPULATION • EMPLOYMENT • EARNINGS

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I. INTRODUCTION

The **City of Holts Summit** is located in Callaway County and is part of the Jefferson City Metropolitan Statistical Area (JC MSA). The population was 3,247 at the 2010 census. It is the second largest city in Callaway County and the fifth largest city in the four-county JC MSA. Holts Summit, with a population growth rate of 10.6 percent, is the fastest growing city in the JC MSA of all cities with at least 2,000 or more population.

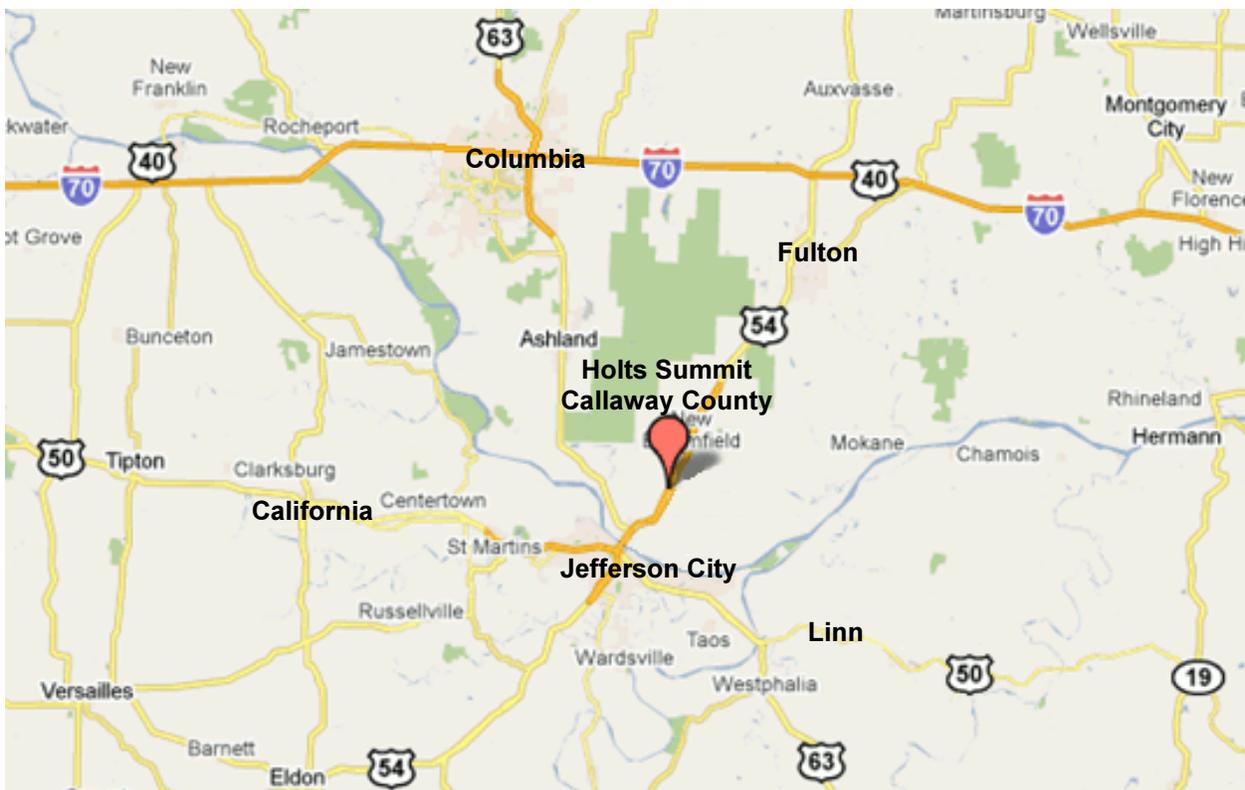
The primary goal is to assist Holts Summit address the ongoing development and workforce needs of area employers, entrepreneurs, and other stakeholders with better information for planning and investment decisions. The three primary focus areas in the Community and Workforce Profile are: population, employment and earnings.

The availability, skills, talents, and education of an area's workforce is becoming more and more a community's most important asset for economic activity. This profile is about measuring and quantifying this asset.

The retained consultant, **The Growth Services Group**, is a nationally recognized workforce and economic development company that has served clients in business, industry, and government since 1994. Growth Services has become known for its primary and secondary research in local workforce markets and the competitive realities of Labor Quality, Skill Availability, and Cost.

CITY OF HOLTS SUMMIT AND CALLAWAY COUNTY, MISSOURI

- Is located in Central Missouri and part of the Jefferson City Metropolitan Statistical Area (JC MSA)
- Is the second largest city in Callaway County and the fastest growing city with a population of 2,000 or more in the JC MSA
- Has an MSA population of 149,807 and labor force of 77,772 for labor draw and support services



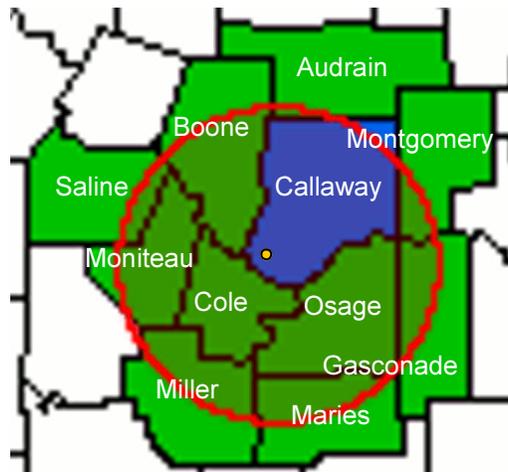
Source: Google Maps

AREA LABOR MARKET

Holts Summit/Callaway County Area Labor Market (ALM)

Four County JC MSA and parts of Eleven County ALM Potential Sources of Workforce Assets

Holts Summit Missouri 35 Mile Radius Map



Radius is based on the estimated distance from Holts Summit, MO. The potential sources of workers consists of the following counties: Audrain, Boone, Callaway, Cole, Gasconade, Maries, Miller, Moniteau, Montgomery, Osage, and Saline.

Estimated Population and Civilian Labor Force

Entity	2010 Population	2010 Civilian Labor Force
Holts Summit	3,247	N/A
Callaway	44,332	22,743
JC MSA	149,807	77,771
Missouri	5,988,927	3,014,310
USA	308,745,538	153,889,000

Source: U.S. Census & Bureau of Labor Statistics

OVERVIEW AND METHODOLOGY

The Workforce Profile provides a quick overview of Holts Summit/Callaway County, Missouri with data relating to population, employment and earnings. This data is available from public sources such as the U.S. Census, the Bureau of Labor Statistics (BLS), Bureau of Economic Analysis (BEA), the National Center for Education Statistics (NCES) and the various state research centers such as the Missouri Economic Research and Information Center (MERIC). Where possible, this review makes direct comparisons with the local Area Labor Market (ALM), State of Missouri, and the USA nationally.

The presentation in the following charts and tables is used to analyze the local workforce market for trends and competitiveness with the state and nation. By doing this, it highlights the area's unique characteristics. In the past, the evaluation process focused primarily on the local Civilian Labor Force and it was assumed a high unemployment rate translated to an ample supply of workers. Today, this is no longer true. The economic development evaluation process also includes information on the quality, availability, and cost and can vary greatly from area to area and state to state.

Holts Summit, Missouri Greenway Park



II. SUMMARY OF FINDINGS

POPULATION FINDINGS

Holts Summit and Callaway County have a real population growth rate where net in-migration is the primary cause for population growth.

- The population in the 2010 Census for Holts Summit is 3,247, a 10.6 percent increase since the 2000 Census. During that time total available housing increased from 1,227 to 1,572 for a 28.1 percent increase
- The age distribution for Holts Summit and Callaway County, from age (18 to 65 workage), represents over 64 percent of the population compared with 61 percent for the State of Missouri and 63.0% for the USA.
- The population for the JC MSA designated four-county Labor Market is 144,807 with a civilian labor force of 77,771.

EMPLOYMENT FINDINGS

It is common that many Metropolitan municipalities serve more as bedroom communities than as primary employment centers. However, recent trends indicate more municipalities are attempting to diversify their tax base with employment opportunities and more workers are interested in seeking employment closer to home in order to reduce commuting time and costs. Holts Summit has opportunities in this area and is positioned well for employment growth.

- Ninety-six percent of those 1,532 employed who live in Holts Summit work outside the city of Holts Summit, and of the 655 employees who work in Holts Summit only five percent live in Holts Summit for a total of 62 who are employed both live and work in Holts Summit.
- The employment in Manufacturing in 2010 for Callaway County was 1,486 or 14.8 percent of the total private sector employment. This compares to 11.3 percent for the State of Missouri and 10.8 percent nationally.
- Employment in Callaway County, growing at 9.9 percent from 2001 to 2010, is the fastest growing in the four-county JC MSA, and the highest average weekly wage of \$732.

EARNINGS FINDINGS

Average wages are higher and per capita income is lower in Callaway County when compared with the JC MSA. All income sources including transfer payments are included in the per capita data while only earned wages while employed are included in average wages.

- Callaway County had a per capita income of \$28,048 in 2009 compared to the State of Missouri at \$36,181 and \$39,635 for the nation.
- The average overall Weekly Wage for Callaway County was \$732 in 2010 compared with the State of Missouri at \$786 and \$893 for the nation.
- Manufacturing jobs, while higher paying in Callaway County than other primary industry sectors, were still 8 percent more competitive than Missouri and 27 percent more competitive than the nation.

QUICK FACTS

The Quick Facts overview by percentages provides a guide for comparison to larger geographic areas such as state and national data by degree and variance on either the plus or minus side. This can be important when evaluating workforce for age or education. Comparisons in travel time to work and poverty level are also important indicators of the workforce.

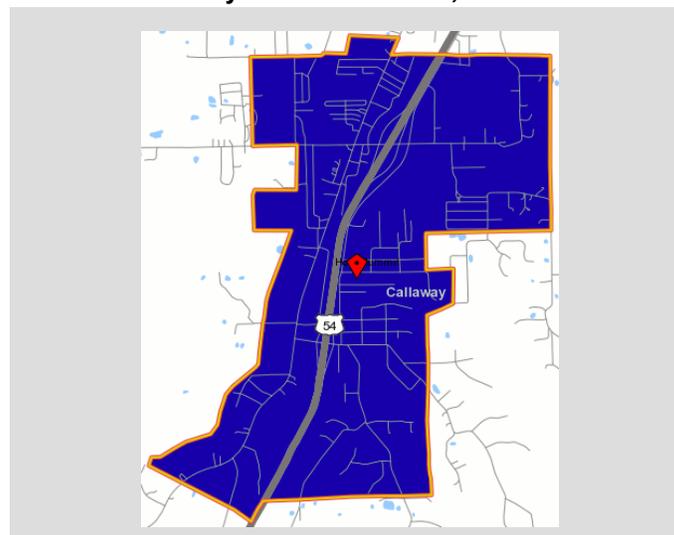
In the age category, Callaway County has a smaller percentage of the population under 18 years of age compared to either the JC MSA, State of Missouri or the United States. The age distribution from age 18 to 64 (workage) is 65.8 percent of the population, higher than the JC MSA at 64.2 percent, State of Missouri at 62.4 percent, and the United States at 62.8 percent. This means that Callaway County has a larger percentage of the population in the working age (18-64) category and is normally considered a positive in workforce analysis. In population diversity Callaway County is represented by 8.0 percent for minorities and compares with Missouri at 17.2 percent and the USA at 27.6 percent. (See Callaway County People QuickFacts below)

Callaway County People QuickFacts Percentage Comparisons

Category	Callaway County	JC MSA	Missouri	USA
People Under 5 years old, 2009	6.0%	6.6%	6.7%	6.9%
People Under 18 years old, 2009	22.7%	23.5%	23.9%	24.3%
People 65 years old and over, 2009	11.5%	12.3%	13.7%	12.9%
Females, 2009	48.6%	48.8%	51.1%	50.7%
White persons, 2009	92.0%	88.8%	82.8%	72.4%
Minority, Ethnic People, 2009	8.0%	11.2%	17.2%	27.6%
Foreign born people, 2009	1.1%	2.0%	3.5%	12.4%
Mean Travel Time (Minutes) 2009	20.6	14.2	23.1	25.2
High School graduates, age 25+, 2009	85.1%	85.6%	85.6%	84.6%
Bachelor's Degree or Higher 2009	20.3%	24.1%	24.6%	27.5%
Homeownership rate, 2009	77.9%	73.5%	70.3%	66.9%
Housing Units in multi-units, 2009	10.0%	16.2%	19.6%	25.9%
People below poverty, 2009	11.0%	11.3%	13.7%	13.5%

City data under 25,000 population is not available.

City of Holts Summit, MO



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III. POPULATION

POPULATION AND HOUSING

For the 2010 census, Holts Summit has a population of 3,247 with an increase of 10.6 percent from 2000 and total available housing of 1,572 units for a 28.1 percent increase from 2000. Holts Summit is the fastest growing city in the four-county Jefferson City Metropolitan Statistical Area (JC MSA) for cities with at least 2,000 or more population. The growth rate is faster than the county, MSA, state, or nation according to the U.S. Census. The occupancy rate appears to have decreased from 2000; however, this decrease appears to be relatively consistent in 2010 among the different geographic areas in Missouri with Holts Summit at 87.6 percent, the same as Missouri.

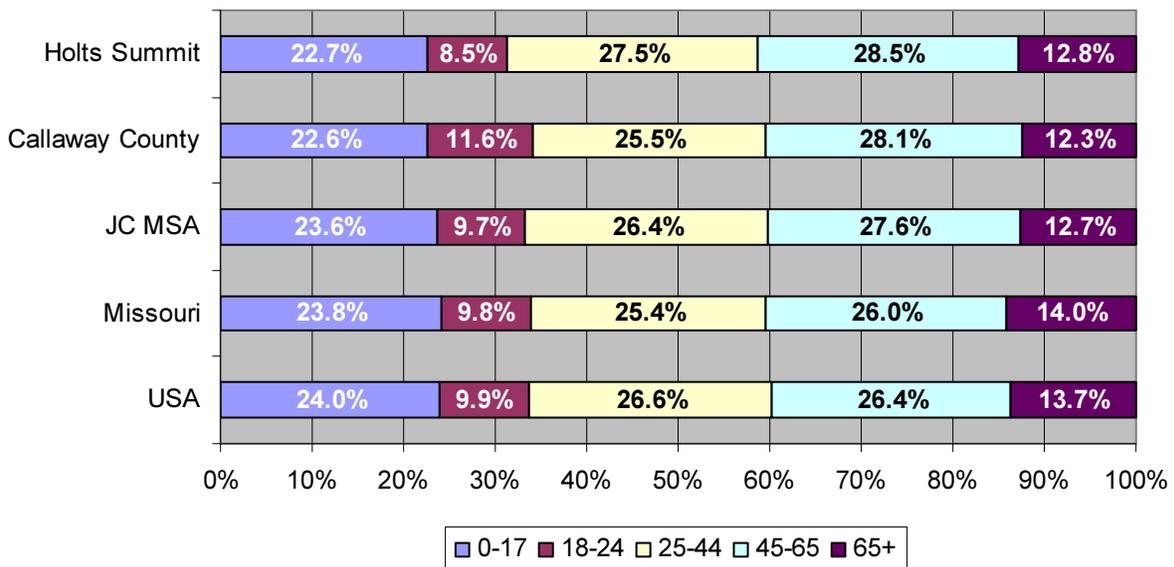
County	2000	2010	Change		Total housing	Occupied Housing	Occupation Rate
Holts Summit	2935	3247	312	10.6%	1,572	1,377	87.6%
Callaway County	40,766	44,332	3,566	8.7%	18,522	16,333	88.2%
J C MSA	140,052	149,807	9,755	7.0%	63,585	56,915	89.5%
Missouri	5,595,211	5,988,927	393,716	7.0%	2,712,729	2,375,611	87.6%
USA	281,424,602	308,745,538	27,320,936	9.7%	NA	NA	NA

Source: U.S. Census and OSEDA University of Missouri Extension

AGE DISTRIBUTION

The Holts Summit/Callaway County Area Labor Market has over 65 percent of its population age 18 through 65. This compares to 61 percent for the State of Missouri and 63 percent nationally. Holts Summit, Callaway County, and the Jefferson City MSA (JC MSA) all have a smaller percent of the population 65 or older than the State of Missouri and national averages.

Population Age Distribution



Population Age Distribution

	Median	0-17	18-24	25-44	45-65	65+
Holts Summit	37.7	738	277	893	924	415
Callaway County	37.7	10,003	5,121	11,308	12,440	5,460
J C MSA	n/a	35,299	14,594	39,500	41,399	19,015
Missouri	37.9	1,425,436	589,264	82,134,554	1,611,850	838,294
USA	37.2	74,181,467	30,672,088	82,134,554	81,489,445	40,267,984

Source: U.S. Census 2010

EDUCATION ATTAINMENT

One of the benefits of identifying educational attainment levels is to determine the skills and education available in the local workforce and comparing it to the state and national levels. Studies show that higher education levels are tied to higher earnings, lower unemployment rates, and improved lifestyles.

While the four-county JC MSA compares favorably or slightly lower in Bachelors or higher degrees with the State of Missouri and USA, the differences in the four counties is significant with Cole County by itself higher at 30.4 percent compared with the State of Missouri (24.6 percent) or the USA (27.5 percent). Callaway County ranks second at 20.4 percent in the four-county MSA comparison. The significance and presence of higher education attainment is evident with the presence of state government and several primary industries, such as the Callaway Ameren Nuclear Power Plant and the ABB Manufacturing Plant. These facilities and operations require higher education and skill levels and, therefore, opportunities for careers with higher pay and spousal employment.

According to research conducted by the Mid-Missouri Regional Planning Commission, "Colleges and Universities are well represented in Mid-Missouri, with seven public and private learning institutions. The data shows an enrollment of over 46,000 students with 10,600 from other states and 580 from other counties. Over 7,000 receive Baccalaureate Degrees each year". Holts Summit is located within an easy commute to any of these institutions. The University of Missouri in Columbia is the largest with a reported fall 2010 enrollment of over 32,000. Opportunities to recruit a young, talented, and educated workforce for local employers is excellent and a competitive advantage for Holts Summit and Central Missouri.

Located within the City of Holts Summit is the North Elementary School. According to GreatSchools.org, Holts Summit's North Elementary School serves grades K-5 in the Jefferson City School District. It has received a GreatSchools Rating of 7 out of 10, based on its performance on state standardized tests. The school community has reviewed this school and given it an average rating of 5 out of 5 stars.

Educational Attainment: Census 2009	Callaway County	JC MSA	Missouri	USA
Total Population 25 and Older	100.0%	100.0%	100.0%	100.0%
Less Than 9th Grade	4.1%	5.3%	4.9%	6.4%
9th to 12th, No Diploma	10.8%	9.1%	8.5%	9.1%
High School Graduate (incl. equiv.)	38.9%	36.2%	36.0%	29.3%
Some College, No Degree	19.3%	19.0%	19.6%	20.3%
Associate Degree	6.6%	6.3%	6.4%	7.4%
Bachelor's Degree	13.5%	16.7%	15.6%	17.4%
Graduate or Professional Degree	6.9%	7.4%	9.0%	10.1%
Total Population, 25 and Older	28,133	94,943	3,883,907	197,440,772

Source: U.S. Census. Data on Holts Summit not available.

RACE AND ETHNICITY

The 2010 estimates from the Census Bureau indicate that 92.0 percent of the population in Holts Summit and Callaway County was White with 2,991 persons in Holts Summit. The estimated Black population for Holts Summit was 128 or 3.9 percent. The same set of estimates indicated there were 15 Asians (0.5%) and 10 American Indians (0.3%). These are all "race alone" figures. Hispanic is not considered to be a race by the Census Bureau, but rather a separate ethnic category. In 2010, an estimated 707 Hispanic persons (0.2%) were living in Callaway County.

Population Estimates By Race And Hispanic Origin in 2010

	Holts Summit	Callaway County	JC MSA	Missouri	USA
American Ind. or Alaskan Native Alone	10	217	545	27376	2932248
Asian Alone	15	245	1281	98083	14674252
Black Alone	128	2032	11153	693391	38929319
Native Hawaiian and Other Pac. Isl. Alone	2	17	80	6261	540013
White Alone	2991	40778	133059	4958770	223553265
Other Race	33	201	1175	80457	19107368
Two or More Race Groups	68	842	2514	124589	9009073
Hispanic or Latino can be of any race					
Not Hispanic or Latino	3174	43625	146635	5776457	258267944
Hispanic or Latino	73	707	3172	212470	50477594
Population Total	3247	44332	149807	5988927	308745538

Population Estimates Percentage By Race And Hispanic Origin 2010

	Holts Summit	Callaway County	JC MSA	Missouri	USA
American Ind. or Alaskan Native Alone	0.3%	0.5%	0.4%	0.5%	0.9%
Asian Alone	0.5%	0.6%	0.9%	1.6%	4.8%
Black Alone	3.9%	4.6%	7.4%	11.6%	12.6%
Native Hawaiian and Other Pac. Isl. Alone	0.1%	0.0%	0.1%	0.1%	0.2%
White Alone	92.1%	92.0%	88.8%	82.8%	72.4%
Other Race	1.0%	0.5%	0.8%	1.3%	6.2%
Two or More Race Groups	2.1%	1.9%	1.7%	2.1%	2.9%
Hispanic or Latino can be of any race					
Not Hispanic or Latino	97.8%	98.4%	97.9%	96.5%	83.7%
Hispanic or Latino	2.2%	1.6%	2.1%	3.5%	16.3%

IV. EMPLOYMENT

CIVILIAN EMPLOYMENT

Another element when comparing Industry Employment with Civilian Employment is that Civilian Employment counts all people working including self-employed, as well as job holders; whereas Industry Employment counts only those on a payroll where withholdings are taken from their checks.

**Civilian Employment
August 2011**

County/Area	Labor Force	Employment	Unemployment	Unemployment Rate
Callaway County	22,808	20,994	1,814	8.0%
JC MSA	77,981	72,322	5,659	7.3%
Missouri	3,043,206	2,771,503	271,703	8.9%
USA	154,343,000	140,335,000	14,008,000	9.1%

Source: Bureau of Labor Statistics & MO MERIC

INDUSTRY EMPLOYMENT

This section presents employment information as developed and published by the Bureau of Labor Statistics under NAICS (The North American Industry Classification System). It is a publication of the business economy, and in cooperation with agencies in Canada and Mexico allows a high level of comparability of statistics among the three countries.

The NAICS classification lists both establishments and jobs by code up to six digits in detail. Unfortunately smaller counties will not list certain industries due to number of establishments and disclosure requirements. The data can be segmented into many different categories, such as Goods Producing or Service Providing Sectors, Government and Private Sectors, and then further into sub-sectors.

This analysis will focus on only those most concentrated private two-digit sectors and three-digit sub-sectors.

Industry Sector Concentration

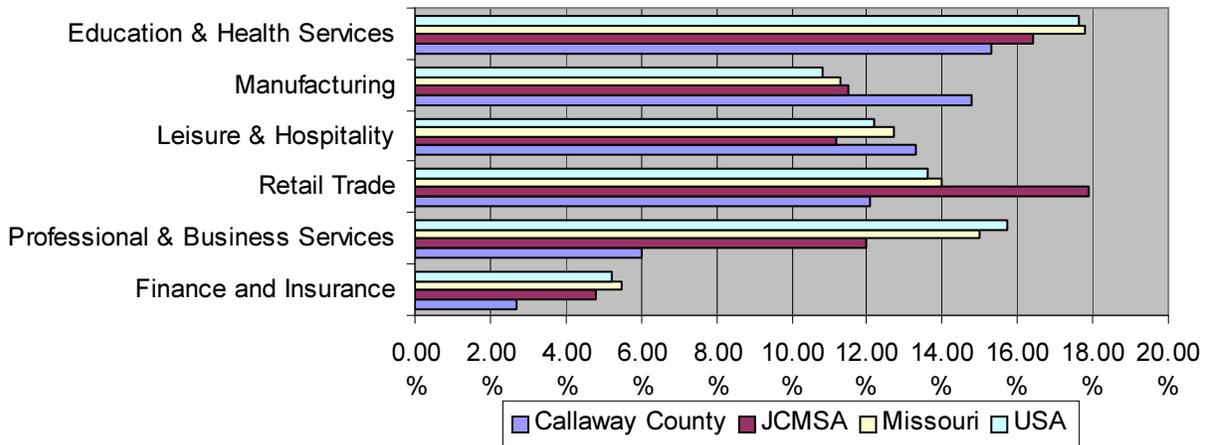
For Callaway County Labor Market, the Education and Health Services Sector provided the most private sector employment with 1,532 or 15.3 percent of all jobs. This is followed by Manufacturing with 14.8 percent of private sector jobs. Government employment, while considered part of total employment of 14,260 for Callaway County, is not included in this private sector analysis of 10,040.

It is important to note that Callaway County along with the four-county JC MSA has a much higher concentration of public sector employment than overall state and national averages. In Callaway County government employment is 29.6 percent of the total employment and in JC MSA it is 36.3 percent. This compares with government employment to total employment for the State of Missouri at 16.7 percent.

The private higher education institutions (Westminster College and William Woods University) are located in Fulton and Callaway County and are part of the Education and Health Services Sector. The All Other represents some of those sectors not disclosable. Manufacturing is more concentrated or clustered than the MSA, state, or nation in relation to total jobs while Retail is less so.

According to the Bureau of Labor Statistics, Callaway County had a 9.9 percent private sector employment growth rate from 2001 to 2010 and a weekly average wage of \$732 for 2010. Both of these were higher than any other county in the four-county JC MSA.

Industry Employment–Private Sector



Industry Employment–Private Sector

	Callaway County		JCMSA		Missouri		USA	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Education & Health Services	1,532	15.3%	7,761	16.4%	381,887	17.8%	18,656,160	17.6%
Manufacturing	1,486	14.8%	5,444	11.5%	243,034	11.3%	11,487,496	10.8%
Leisure & Hospitality	1,331	13.3%	5,314	11.2%	271,730	12.7%	13,006,814	12.2%
Retail Trade	1,215	12.1%	8,483	17.9%	298,991	14.0%	14,481,324	13.6%
Professional & Business Services	604	6.0%	5,685	12.0%	320,569	15.0%	16,712,011	15.7%
Finance and Insurance	268	2.7%	2,273	4.8%	118,925	5.5%	5,486,241	5.2%
All Other	3,604	35.9%	12,321	26.1%	507,805	23.7%	26,371,186	24.8%
Total	10,040	100.0%	47,281	100.0%	2,142,941	100.0%	106,201,232	100.0%

Source: Bureau of Labor Statistics (2010)

Industry Sub-Sector Concentration and Clusters

Since Holts Summit's workforce talent is shared by both Callaway County and Cole County the data is combined for the cluster ranking. The Industry Sub-Sector Concentration and Clusters is an estimated ranking by employment and wages of the three-digit industry groups for a two-county Area Labor Market. The rankings utilize information sources from BLS and MERIC in its listings for the Central Missouri Workforce Investment Boards.

Due to confidentiality restrictions and BLS or State disclosure standards certain three-digit industry groups may not be represented for employment and wages in the following table. Two industry sectors affected by those restrictions may be the "Electrical Equipment and Appliance Manufacturing" and "Utility" industries.

According to MERIC in presenting its Industry Pattern Analysis for the Central Region "Electrical equipment manufacturing in Mid-Missouri has the highest location quotient of any pattern industry. Although a small number of firms operate in the area, these companies employ a large workforce and pay well above average wages." "The firms in this region are global companies that provide a range of industrial electrical equipment." "Since 2009, the Jefferson City metro area has exported \$263 million in goods and services, ranking 6th overall out of Missouri metro areas, just ahead of Joplin." Callaway County is a significant contributor to the JC MSA exports in goods and services.

Industry Concentration and Clusters Top Employing Industries in Callaway And Cole County Labor Market

Rank	NAICS Code		Employment	Weekly Wage
1	722	Food Services and Drinking Places	4,289	\$246
2	561	Administrative and Support Services	2,255	\$473
3	238	Specialty trade contractors	1,947	\$885
4	541	Professional and Technical Services	1,934	\$1,097
5	621	Ambulatory Health Care Services	1,867	\$1,222
6	623	Nursing and Residential Care Facilities	1,378	\$410
7	452	General Merchandise Stores	1,362	\$359
8	551	Management of Companies and Enterprises	1,242	\$928
9	522	Credit Intermediation & Related Activity	1,147	\$906
10	423	Merchant Wholesalers, Durable Goods	1,005	\$1,007
11	813	Membership Organizations & Associations	897	\$891
12	323	Printing and related support activities	887	\$901
13	611	Educational Services	825	\$620
14	624	Social Assistance	765	\$405
15	448	Clothing and Clothing Accessories Stores	751	\$249
16	524	Insurance Carriers & Related Activities	733	\$976
17	441	Motor Vehicle and Parts Dealers	722	\$650
18	424	Merchant Wholesalers, Nondurable Goods	668	\$690
19	444	Building Material & Garden Supply Stores	626	\$509
20	237	Heavy and civil engineering construction	590	\$1,178
21	336	Transportation equipment manufacturing	585	\$435
22	447	Gasoline Stations	569	\$325
23	424	Merchant Wholesalers, Nondurable Goods	514	\$686
24	812	Personal and Laundry Services	478	\$384
25	326	Plastics and rubber products manufacturing	332	\$703

Source: BLS and MO MERIC 2010. Further recommended research articles posted on the Missouri MERIC website are: "Pattern Analysis" and "Missouri Targets Advanced Manufacturing."

COMMUTING LIVE WORK PATTERNS

Holts Summit can at best be classified as a bedroom community to Jefferson City and Cole County. Over 50 percent of the Holts Summit residents who are employed work in Jefferson City and another seven percent work in Columbia. Only 62, or four percent, of the 1,532 residents who are employed, work in Holts Summit. This means that 593, or 90.5 percent, of the 655 who work within the city boundaries come in from the outside.

Commuting patterns are important when evaluating Labor and Commercial Markets. Highways and transportation networks and commercial and industrial development all contribute to this factor. As the following tables suggest the large outflow of commuting workers (778) is to Jefferson City, where state government is a large draw for jobs.

The data also suggests that only 14 percent of those employed work anywhere in Callaway County, including Holts Summit or Fulton. The other 86 percent work outside the Callaway County boundaries.

This presents a great opportunity for further commercial and industrial development for Holts Summit. One of Holts Summit's greatest assets is its available and talented workforce, which is now better utilized outside of the Holts Summit area.

Holts Summit Commuting By City

Live In	Work in Holts Summit	
	Count	%
Jefferson City	99	15.1%
Holts Summit	62	9.5%
Columbia	23	3.5%
Fulton	17	2.6%
Mexico	9	1.4%
All Other	445	67.9%
Total Employed	655	100.0%

Source: U.S. Census 2009

Work In	Live in Holts Summit	
	Count	%
Jefferson City	778	50.8%
Columbia	102	6.7%
Holts Summit	62	4.0%
Fulton	60	3.9%
Springfield	23	1.5%
All Other	507	33.1%
Total Residence	1532	100.0%

Source: U.S. Census 2009

Holts Summit Commuting By County

Live In	Work in Holts Summit	
	Count	%
Callaway	304	46.4%
Cole	179	27.3%
Boone	50	7.6%
Audrain	11	1.7%
Osage	10	1.5%
All Other	101	15.4%
Total Employed	655	100.0%

Source: U.S. Census 2009

Work In	Live in Holts Summit	
	Count	%
Cole	823	53.7%
Callaway	213	13.9%
Boone	124	8.1%
St. Louis	63	4.1%
Greene	25	1.6%
All Other	284	18.5%
Total Residence	1532	100.0%

Source: U.S. Census 2009

EMPLOYMENT INDICATORS

The employment indicators for Callaway County show excellent employment and average monthly earnings growth over a ten year period from 2000 to 2010. This compares favorably to both the JC MSA and the State of Missouri. This data is not available for small cities.

The table shows comparisons for the second quarter for three different time periods (2000, 2005 and 2010) with the State of Missouri and the four-county JC MSA. The lower separation rate indicates a growing and more stable job market.

The tables provide time line, industry sector and area data comparisons. It is another way to differentiate the local area with other areas as it relates to new hires, turnover, new hire earnings and average earnings. Callaway County's comparable labor turnover and lower labor costs may be a competitive advantage when compared to the State of Missouri, however, only after considering quality and skill availability.

The following employment indicators for Callaway County are available on-line with Missouri a participating partner with the U.S. Census. This tool provides easy access to reports which provide employment growth measurements for the selected employment area including new hires, separations, turnover, the average monthly earnings and the average new hires earnings.

Employment Indicators—Overall

	Total Employment	New Hires	Separations	Turnover	Avg. Monthly Earnings	Avg. New Hire Earnings
Callaway 2000 Q2	14,432	3,083	3,321	9.1%	\$2,362	\$1,312
Callaway 2005 Q2	14,012	2,734	3,062	9.7%	\$2,626	\$1,670
Callaway 2010 Q2	15,353	2,582	3,187	8.2%	\$3,027	\$1,816
% Change 2000-2010	6.4%	-16.3%	-4.0%	-0.9%	28.2%	38.4%
JC MSA 2000 Q2	74,200	12,971	13,761	8.2%	\$2,436	\$1,523
JC MSA 2005 Q2	74,833	11,641	12,858	9.2%	\$2,672	\$1,821
JC MSA 2010 Q2	76,831	8,917	9,954	6.2%	\$2,993	\$1,814
% Change 2000-2010	3.5%	-31.3%	-27.7%	-2.0%	22.9%	19.1%
Missouri 2000 Q2	2,631,218	618,205	654,615	10.8%	\$2,314	\$1,843
Missouri 2005 Q2	2,620,214	516,184	544,892	9.4%	\$3,046	\$1,940
Missouri 2010 Q2	2,525,830	391,509	427,854	8.1%	\$3,317	\$2,098
% Change 2000-2010	-4.0%	-36.7%	-34.5%	-2.7%	43.3%	13.9%

Source: U.S. Census 2010. Holts Summit data not available

The following tables show the ten-year employment trends for Manufacturing, Retail, and Healthcare. While manufacturing jobs are decreasing at both the state and national level, the rate of decrease in Callaway County is less than the JC MSA and the State of Missouri. The employment indicators for retail and healthcare are less favorable when comparing them to the JC MSA and the State of Missouri in both employment level and average earnings. The proximity to Jefferson City and Cole County retail and healthcare industry concentrations may be a factor.

Employment Indicators—Manufacturing

	Total Employment	New Hires	Separations	Turnover	Avg. Monthly Earnings	Avg. New Hire Earnings
Callaway 2000 Q2	2,067	240	255	5.5%	2,775	1,792
Callaway 2005 Q2	915	166	144	7.2%	2,791	1,741
Callaway 2010 Q2	1,492	134	124	3.5%	3,537	2,495
% Change 2000-2010	-27.8%	-44.2%	-51.4%	-2.0%	27.5%	39.2%
JC MSA 2000 Q2	8,317	1,162	1,180	6.4%	2,754	2,185
JC MSA 2005 Q2	6,183	841	725	5.6%	3,144	2,152
JC MSA 2010 Q2	5,366	616	432	4.1%	3,387	2,255
% Change 2000-2010	-35.5%	-47.0%	-63.4%	-2.3%	23.0%	3.2%
Missouri 2000 Q2	359,418	50,194	52,653	6.9%	3,111	2,168
Missouri 2005 Q2	301,376	32,806	34,516	5.8%	3,415	2,516
Missouri 2010 Q2	233,670	19,066	19,644	4.9%	3,831	2,815
% Change 2000-2010	-35.0%	-62.0%	-62.7%	-2.0%	23.1%	29.8%

Employment Indicators—Retail

	Total Employment	New Hires	Separations	Turnover	Avg. Monthly Earnings	Avg. New Hire Earnings
Callaway 2000 Q2	2,710	341	317	6.7%	1,970	1,014
Callaway 2005 Q2	1,249	320	321	11.1%	1,695	1,135
Callaway 2010 Q2	1,167	207	215	9.0%	1,837	1,260
% Change 2000-2010	-56.9%	-39.3%	-32.2%	2.3%	-6.8%	24.3%
JC MSA 2000 Q2	8,344	1,867	2,101	11.9%	1,576	1,202
JC MSA 2005 Q2	8,292	1,551	1,733	18.6%	1,687	1,215
JC MSA 2010 Q2	7,140	1,102	1,066	8.2%	1,874	1,315
% Change 2000-2010	-14.4%	-41.0%	-49.3%	-3.7%	18.9%	9.4%
Missouri 2000 Q2	319,241	54,037	57,261	9.9%	2,479	1,692
Missouri 2005 Q2	324,352	73,066	74,025	11.3%	2,085	1,406
Missouri 2010 Q2	296,411	48,932	48,834	8.8%	2,141	1,501
% Change 2000-2010	-7.2%	-9.5%	-14.7%	-1.1%	-13.6%	-11.3%

Employment Indicators—Health Care

	Total Employment	New Hires	Separations	Turnover	Avg. Monthly Earnings	Avg. New Hire Earnings
Callaway 2000 Q2	2,770	341	317	6.7%	1,970	1,014
Callaway 2005 Q2	2,718	286	339	7.6%	2,111	1,420
Callaway 2010 Q2	3,000	244	369	8.2%	2,486	1,952
% Change 2000-2010	8.3%	-28.4%	16.4%	1.5%	26.2%	92.5%
JC MSA 2000 Q2	6,602	1,052	1,083	8.4%	2,393	1,330
JC MSA 2005 Q2	7,448	1,010	1,110	8.5%	2,691	1,496
JC MSA 2010 Q2	8,251	852	973	7.6%	3,072	1,843
% Change 2000-2010	25.0%	-19.1%	-10.2%	-0.8%	28.4%	38.6%
Missouri 2000 Q2	319,241	54,037	57,261	9.9%	2,479	1,692
Missouri 2005 Q2	345,868	48,087	49,944	8.7%	2,911	1,918
Missouri 2010 Q2	390,860	44,420	51,981	7.7%	3,323	2,050
% Change 2000-2010	22.4%	-17.8%	-9.2%	-2.2%	34.0%	21.2%

Source: U.S. Census 2010. Holts Summit data not available

V. EARNINGS

INCOME/HOUSEHOLD AND PER CAPITA

The income information is provided on two levels: Per Capita Income and Household Income. The Per Capita Income includes all income earned through wages, transfer payments, dividends, interest, etc.

The Per Capita Income for Callaway County grew 9.9 percent from 1999 to 2009. This compares to a growth rate of 15.7 percent for the JC MSA, 9.3 percent for Missouri, and 10.2 percent for the United States.

INCOME AND WAGES Household and Per Capita Income

Area	Median Household Income 2009	Per Capita 2009	Per Capita 1999	% Change 1999 to 2009
Callaway County	\$47,214	\$28,048	\$25,513	9.9%
JC MSA	n/a	\$34,691	\$29,990	15.7%
Missouri	\$45,149	\$36,181	\$33,091	9.3%
USA	\$50,221	\$39,635	\$35,978	10.2%

Source: Bureau of Economic Analysis & MO MERIC 2009

INDUSTRY WAGE TRENDS

The overall Average Weekly Wage for Callaway County grew 13.3 percent from 2005 to 2010 with the manufacturing sector growing at 18.7 percent. The Education & Health Services sector grew at 13.9 percent and was below the Service Providing averages. The 2010 average of \$549 per week for Education and Health Services was 29.6 percent lower than the State of Missouri average and 34.6 percent lower than the National average of \$839.

Goods Producing Comparisons

	Overall			Goods Producing			Manufacturing		
	2005	2010	Percent	2005	2010	Percent	2005	2010	Percent
Callaway County	646	732	13.3%	764	869	13.7%	733	870	18.7%
JC MSA	592	678	14.5%	713	800	12.2%	700	759	8.4%
Missouri	696	786	12.9%	829	933	12.5%	844	948	12.3%
USA	779	893	14.6%	890	1047	17.6%	948	1106	16.7%

Source: Bureau of Labor Statistics

Service Providing Comparisons

	Overall			Service Providing			Education & Health Services		
	2005	2010	Percent	2005	2010	Percent	2005	2010	Percent
Callaway County	646	732	13.3%	602	690	14.6%	482	549	13.9%
JC MSA	592	678	14.5%	558	648	16.1%	648	743	14.7%
Missouri	696	786	12.9%	661	755	14.2%	682	780	14.4%
USA	779	893	14.6%	750	860	14.7%	724	839	15.9%

Source: Bureau of Labor Statistics

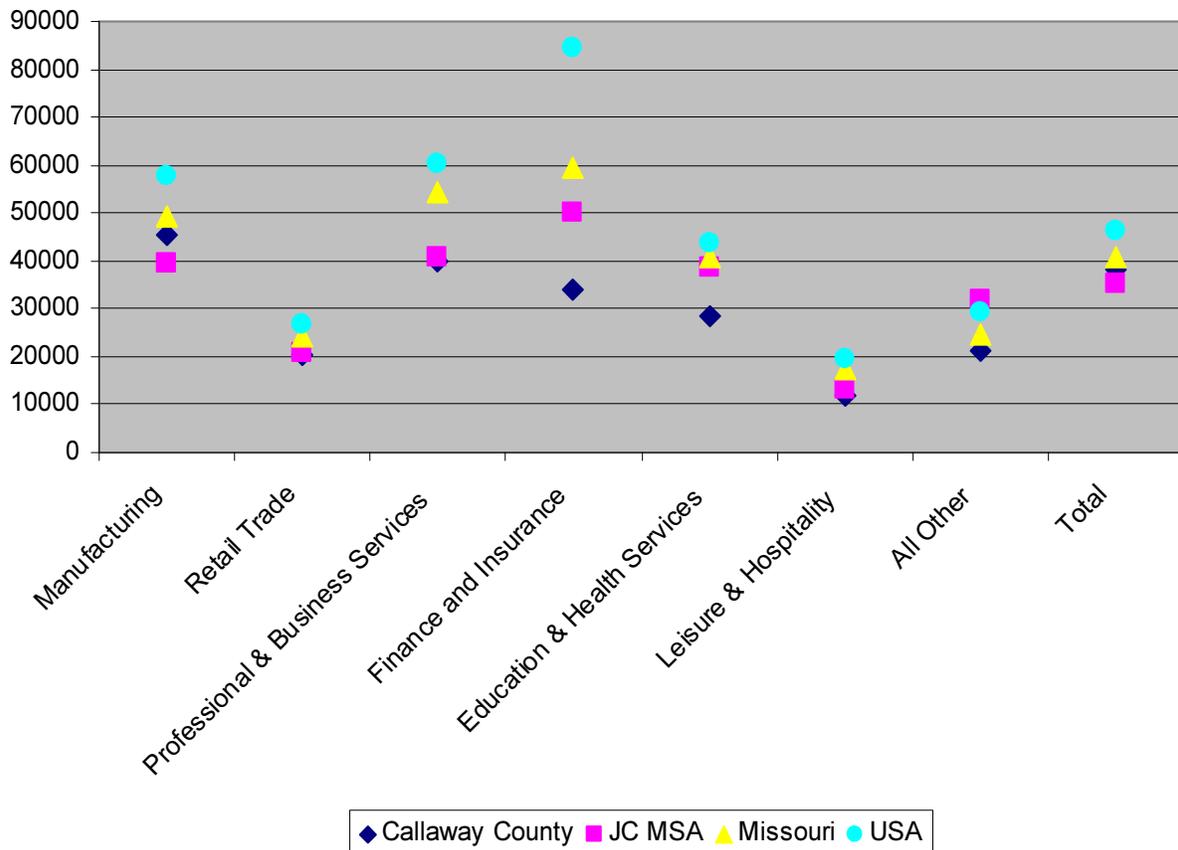
INDUSTRY SECTOR ANNUAL EARNINGS

The following table lists Industry Annual Earnings in the same sequence and format as Industry Employment listed jobs. It should be noted that manufacturing jobs normally provide the best compensation for workers. From an earnings perspective, Callaway County is 8 percent more favorable for career opportunities than the JC MSA Labor Market as a whole; however, seven percent more competitive than the State of Missouri, and 48 percent more competitive than the nation. Outside of Manufacturing the other industry sectors show similar lower cost comparisons to the JC MSA, Missouri, and the Nation.

Average Annual Salary—Private Sector

	Callaway County	JC MSA	Missouri	USA
Manufacturing	\$45,250	\$39,456	\$49,320	\$57,526
Retail Trade	\$20,268	\$20,909	\$24,385	\$26,655
Professional & Business Services	\$39,932	\$40,945	\$54,158	\$60,144
Finance and Insurance	\$33,948	\$50,220	\$59,566	\$84,516
Education & Health Services	\$28,531	\$38,660	\$40,597	\$43,604
Leisure & Hospitality	\$12,078	\$13,025	\$17,528	\$19,387
All Other	\$21,393	\$31,962	\$24,582	\$29,366
Total	\$38,044	\$35,255	\$40,852	\$46,455

Source: Bureau of Labor Statistics 2010



OCCUPATION EARNINGS AND EMPLOYMENT

The occupation, employment, and average wage rates presented below are those most commonly available at the local level. The JC MSA represents a four-county area which includes Holts Summit and Callaway County. Cashiers and Retail Salesperson are the Occupation Classification with the higher employment in the JC MSA.

While workforce costs are an important element when evaluating an existing labor market, it isn't the only factor. Workforce quality and availability may be the markets explanation for some labor markets having higher or lower labor costs. However, a highly competitive labor cost structure is critical both domestically and in the global marketplace. The labor factor is easier to evaluate when all components (Quality, Availability and Cost) are part of the assessment process.

During periods of low unemployment it may be necessary to go higher than the average mean for the various job classifications to find the applicants with the skills necessary for staffing and during periods of high unemployment and underemployment that level may be lower.

County level occupation comparisons can only be presented with valid third-party survey information. At the US level occupation data is aggregated for comparison no lower than at the MSA or WIB levels. In those cases local data for comparisons may not be available. In a broader sense, income information is presented by the Census Bureau through the Local Employment Dynamic program as Employment Indicators on page 13 .

Occupational Employment and Wage Rates

Occupation	*Jefferson City MSA		Kansas City, MO MSA		St. Louis, MO MSA	
	Employment	Mean	Employment	Mean	Employment	Mean
Retail Salesperson	1,420	\$11.93	28,580	\$11.89	38,590	\$12.81
Cashier	1,880	\$8.98	22,640	\$9.24	32,090	\$9.51
Secretaries and Administrative Assistants	1,080	\$12.47	11,220	\$14.78	16,310	\$14.76
Industrial Engineers	1,010	\$37.44	14,600	\$48.61	17,990	\$50.76
Administrative/Office Manager	270	\$29.16	1,770	\$38.36	2,260	\$58.36
Bookkeeping, Accounting & Audit Clerks	1,240	\$13.94	12,650	\$16.78	15,140	\$17.12
Customer Service Rep.	1,050	\$13.36	20,260	\$15.44	22,440	\$15.68
Automotive Mechanics	340	\$14.88	4,640	\$19.17	7,150	\$17.96
Line Supervisors/Foreman	340	\$33.21	3,500	\$26.63	5,080	\$27.21
Construction Laborers	500	\$17.72	5,800	\$19.09	8,060	\$21.43
Truck Drivers/Heavy	890	\$16.58	13,060	\$19.50	14,670	\$19.70
Warehouse Laborers & Material Movers	1,130	\$11.88	14,850	\$12.63	16,550	\$13.27
Registered Nurse	1,280	\$26.25	21,760	\$31.02	35,270	\$28.99
Waiters and Waitresses	640	\$8.17	17,410	\$10.04	25,180	\$9.55

Source: Bureau of Labor Statistics (May 2010)

*Holts Summit, Callaway County located in Jefferson City MSA

GLOSSARY OF TERMS

Area Labor Market: (ALM) The geographic area normally designated with a core community or county and a surrounding area within a reasonable commute of 35 to 60 miles for work. Transportation access is an important element in any Area Labor Market designation.

Available Workforce: Represents adults from ages 16 or 18 to 64 who indicate they are either looking for a job or would consider changing jobs for the right employment option or opportunity.

Civilian Employment: The employment of all residents living in a county or area and working anywhere (counts people). It counts all people working whether self-employed, as well as job holders. It is reported monthly by Federal and State Labor agencies.

Civilian Labor Force: (CLF) Represents all individuals working and actively seeking employment. Reported monthly by Federal and State Labor agencies.

Commuting Patterns: The willingness of people residing in one community or county to travel to another for work. This can also influence shopping patterns and preference and shows the degree of economic interdependence.

Industry Concentration Clusters: A group of businesses linked by core products or services. These businesses may have common supply chains, labor needs, technologies and markets. This creates a strong economic interdependence.

Industry Jobs: Full-time and part-time positions held by payroll employees in the public or private sector. May exceed actual worker count and reflects all workers working in the county and living anywhere (counts jobs). Industry Jobs counts only those on a payroll where withholdings are taken from their checks. It is reported periodically by Federal and State Labor agencies.

Location Quotient (LQ): A measure of how “concentrated” a particular industry, occupation, or demographic group is in a region as compared to a larger reference region, e.g., state or nation.

Occupation: A category of workers defined by the Standard Occupational Classification (SOC). Occupation skills and experience classification are transferable across industry sectors and could be applied in the goods producing, service providing, or government sectors (private or public).

Workforce Market Supply and Demand: Supply and Demand can best be presented by employer demand and the labor supply. On the supply side the issues are: skill availability, underemployment (excess skills and over qualified), and desired wages and benefits to make a job change. On the demand side the issues are: skill quality, overemployment (deficient skills and under qualified), skill needs (training), and current wages compared to other markets.