2021 STATE OF THE ST. LOUIS WORKFORCE
Equitable recovery. opportunity. growth.

stlcc.edu/STLworkforce
St. Louis labor market recovery and long-term outlook

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Opinions expressed are those of the authors and do not necessarily reflect those of the Federal Reserve Bank of St. Louis or the Federal Reserve System.
Outline of today’s talk

- National Economic Overview
- Regional Economic Overview
- Adapting to Future Trends
US economy is producing more than before the pandemic
US employment continues to lag, but ahead of last recovery

-5.7 million jobs
-22.4 million jobs

-8.6 million jobs

4 years

Shaded areas indicate U.S. recessions.
Source: U.S. Bureau of Labor Statistics
Firms report difficulties hiring and supply chain disruptions

94 unemployed for every 100 job openings
Many have dropped out of labor force, only some returning at this time
As with previous recessions, Black workers disproportionately impacted
Demographic trends suggest labor supply challenges could persist
Strong demand + constrained supply = higher inflation
Outline of today’s talk

- National Economic Overview
- Regional Economic Overview
- Adapting to Future Trends
St. Louis economy rebounded sooner, but job growth has stalled

Nonfarm Payroll Employment
Percent difference from January 2020

Unemployment Rate
Percent change
## Challenge ahead: current supply of workers cannot meet shortfall

<table>
<thead>
<tr>
<th></th>
<th>Jobs</th>
<th>Percent of total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Current shortfall</td>
<td>75,000</td>
<td>--</td>
</tr>
<tr>
<td>Current Labor supply</td>
<td>56,600</td>
<td>75%</td>
</tr>
<tr>
<td>Unemployed</td>
<td>27,800</td>
<td>37%</td>
</tr>
<tr>
<td>Unemployed on temp Layoff</td>
<td>4,600</td>
<td>6%</td>
</tr>
<tr>
<td>Not in labor force: would take job</td>
<td>24,200</td>
<td>32%</td>
</tr>
<tr>
<td>Not in labor force</td>
<td>18,400</td>
<td>25%</td>
</tr>
</tbody>
</table>

Source: Authors estimates based on national current population survey data. Rows may not sum due to rounding.
A greater share of workers have dropped out of labor force

**Labor Force**
Percent difference from January 2020
Slower labor force growth is on the horizon

Model-based forecast: Change from 2019 to 2025

<table>
<thead>
<tr>
<th></th>
<th>Population Age 25-54 (% Chg.)</th>
<th>Population Age 25-54 (Chg.)</th>
<th>Labor Force (% Chg.)</th>
<th>Labor Force (Chg.)</th>
</tr>
</thead>
<tbody>
<tr>
<td>US</td>
<td>1.7</td>
<td>2.2 mil.</td>
<td>3.7</td>
<td>5.9 mil.</td>
</tr>
<tr>
<td>Missouri</td>
<td>0.8</td>
<td>18,500</td>
<td>2.6</td>
<td>80,700</td>
</tr>
<tr>
<td>St. Louis, MSA</td>
<td>-0.7</td>
<td>-7,850</td>
<td>0.5</td>
<td>6,900</td>
</tr>
</tbody>
</table>

Source: IHS/Markit, August 2021 forecast.
Employment recovery expected to run through 2022

Nonfarm Employment, St. Louis, MSA

Forecast change from 2019 to 2025

<table>
<thead>
<tr>
<th>Metro Area</th>
<th>Chg.</th>
<th>Chg. %</th>
</tr>
</thead>
<tbody>
<tr>
<td>St. Louis</td>
<td>-2,500</td>
<td>-0.4%</td>
</tr>
<tr>
<td>St. Louis City</td>
<td>-10,072</td>
<td>-4.2%</td>
</tr>
<tr>
<td>St. Charles</td>
<td>14,683</td>
<td>9.2%</td>
</tr>
<tr>
<td>St. Clair</td>
<td>2,200</td>
<td>2.3%</td>
</tr>
<tr>
<td>Madison</td>
<td>1,500</td>
<td>1.5%</td>
</tr>
</tbody>
</table>

Source: IHS/Markit, August 2021 forecast
Outline of today’s talk

- National Economic Overview
- Regional Economic Overview
- Adapting to Future Trends
Don’t lose sight of the trend during the cycle!
Strategies for a slow growth environment

- Population growth is a sign of regional (geographic) prosperity.
- Rising incomes, employment rates, and property values represent economic prosperity of the current population. This sets the foundation for growth and regional prosperity.
- Investing in the local population and entrepreneurs can grow the labor force, income, and overall demand in a sustainable manner.
- Increasing job/business density can improve access to jobs and generate productivity gains.
- Focus on economic equity and inclusive growth can expand labor force.
- Telework creates a disconnect between location of jobs and households, particularly for the upper income workers.
  - Attracting businesses to stimulate migration can place a burden on existing population regardless of the outcome.
  - A renewed focus on households and their decision-making process is important for regional growth post-pandemic.
- Train and retain: Prime-age workers for the 2040 census are between ages of 5 and 34. Absent economic opportunities our youth will go elsewhere.
Economic overview

Seasonally Adjusted Unemployment Rate

- St. Louis
- Missouri
- U.S.

Data for January 2020 to April 2021 is provided in the diagram.
Economic overview

St. Louis MSA Unemployment Rates by Age and Sex

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Male</th>
<th>Female</th>
</tr>
</thead>
<tbody>
<tr>
<td>All Ages</td>
<td>4%</td>
<td>4%</td>
</tr>
<tr>
<td>16-19</td>
<td>9%</td>
<td>11%</td>
</tr>
<tr>
<td>20-21</td>
<td>11%</td>
<td>11%</td>
</tr>
<tr>
<td>22-24</td>
<td>6%</td>
<td>8%</td>
</tr>
<tr>
<td>25-29</td>
<td>5%</td>
<td>4%</td>
</tr>
<tr>
<td>30-34</td>
<td>3%</td>
<td>3%</td>
</tr>
<tr>
<td>35-44</td>
<td>3%</td>
<td>3%</td>
</tr>
<tr>
<td>45-54</td>
<td>4%</td>
<td>3%</td>
</tr>
<tr>
<td>55-59</td>
<td>3%</td>
<td>2%</td>
</tr>
<tr>
<td>60-61</td>
<td>3%</td>
<td>3%</td>
</tr>
<tr>
<td>62-64</td>
<td>3%</td>
<td>2%</td>
</tr>
<tr>
<td>65-69</td>
<td>3%</td>
<td>3%</td>
</tr>
<tr>
<td>70-74</td>
<td>2%</td>
<td>2%</td>
</tr>
<tr>
<td>75+</td>
<td>1%</td>
<td>7%</td>
</tr>
</tbody>
</table>
21% growth in health care in the last decade

Top 10 St. Louis Industry Clusters

St. Louis mirrors the national trend of an aging workforce.
Educational attainment of the population in St. Louis, Missouri, and the U.S. for different educational levels:

- No High School diploma: St. Louis 8%, Missouri 9%, U.S. 11%
- High School graduate, or alternative: St. Louis 26%, Missouri 31%, U.S. 27%
- Some college, no degree: St. Louis 22%, Missouri 21%, U.S. 20%
- Associate degree: St. Louis 9%, Missouri 8%, U.S. 9%
- Bachelor's degree: St. Louis 21%, Missouri 18%, U.S. 20%
- Graduate or professional degree: St. Louis 15%, Missouri 12%, U.S. 13%
Education pays

Education affects both earnings & unemployment

Biggest salary jump with 4-year degree

Education post-HS provides stability

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St. Louis MSA Unemployment Rates and Earnings by Education, Population 25 Years and Older

<table>
<thead>
<tr>
<th>Unemployment Rates</th>
<th>Educational Attainment</th>
<th>Median Earnings</th>
</tr>
</thead>
<tbody>
<tr>
<td>9.7%</td>
<td>Less than high school graduate</td>
<td>$25,146</td>
</tr>
<tr>
<td>4.9%</td>
<td>High school graduate or GED</td>
<td>$31,736</td>
</tr>
<tr>
<td>3.3%</td>
<td>Some college or associates degree</td>
<td>$39,561</td>
</tr>
<tr>
<td>1.6%</td>
<td>Bachelor's degree or higher</td>
<td>$64,794*</td>
</tr>
</tbody>
</table>

* Bachelor’s ($57,452) and graduate ($72,136) degree medians. Source: 2019 American Community Survey, U.S. Census Bureau.
Methodology

Live interview survey of St. Louis MSA employers

Each interview takes about 23 minutes
### 2021 State of the St. Louis Workforce Employer Survey

<table>
<thead>
<tr>
<th>NAICS</th>
<th>Category Description</th>
<th>Businesses Surveyed</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>NAICS 23</td>
<td>Construction</td>
<td>39</td>
<td>7.6%</td>
</tr>
<tr>
<td>NAICS 31-33</td>
<td>Manufacturing</td>
<td>32</td>
<td>6.2%</td>
</tr>
<tr>
<td>NAICS 42</td>
<td>Wholesale trade</td>
<td>20</td>
<td>3.9%</td>
</tr>
<tr>
<td>NAICS 44-45</td>
<td>Retail trade</td>
<td>75</td>
<td>14.5%</td>
</tr>
<tr>
<td>NAICS 48-49</td>
<td>Transportation and warehousing</td>
<td>12</td>
<td>2.3%</td>
</tr>
<tr>
<td>NAICS 51</td>
<td>Information</td>
<td>12</td>
<td>2.3%</td>
</tr>
<tr>
<td>NAICS 52</td>
<td>Finance and insurance</td>
<td>30</td>
<td>5.8%</td>
</tr>
<tr>
<td>NAICS 53</td>
<td>Real estate and rental and leasing</td>
<td>16</td>
<td>3.1%</td>
</tr>
<tr>
<td>NAICS 54</td>
<td>Professional and technical services</td>
<td>36</td>
<td>7.0%</td>
</tr>
<tr>
<td>NAICS 56</td>
<td>Administrative and waste services</td>
<td>13</td>
<td>2.5%</td>
</tr>
<tr>
<td>NAICS 61</td>
<td>Educational services</td>
<td>8</td>
<td>1.6%</td>
</tr>
<tr>
<td>NAICS 62</td>
<td>Health care and social assistance</td>
<td>103</td>
<td>20.0%</td>
</tr>
<tr>
<td>NAICS 71</td>
<td>Arts, entertainment, and recreation</td>
<td>13</td>
<td>2.5%</td>
</tr>
<tr>
<td>NAICS 72</td>
<td>Accommodation and food services</td>
<td>54</td>
<td>10.5%</td>
</tr>
<tr>
<td>NAICS 81</td>
<td>Other services</td>
<td>46</td>
<td>8.9%</td>
</tr>
<tr>
<td></td>
<td>Other small sectors and Unclassified*</td>
<td>7</td>
<td>1.3%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td><strong>516</strong></td>
<td><strong>100.0%</strong></td>
</tr>
</tbody>
</table>

(*) Other small sectors with Less than 1% of STL MSA Establishments:
- NAICS 11 Agriculture, forestry, fishing and hunting
- NAICS 21 Mining, quarrying, and oil and gas extraction
- NAICS 22 Utilities
- NAICS 55 Management of companies and enterprises
Methodology

Employment Size of Firms Surveyed

- 50 or more: 19%
- 11 to 49: 48%
- 5 to 10: 33%
Pandemic employment impacts

31% of companies cut employees in last 12 months

But 23% continued to hire

St. Louis MSA change in employment levels over the past 12 Months
### Employment Optimism

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
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<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Increase Significantly</td>
<td>6.6%</td>
<td>6.7%</td>
<td>5.6%</td>
<td>6.0%</td>
<td>6.0%</td>
<td>5.6%</td>
<td>5.6%</td>
<td>5.6%</td>
<td>5.6%</td>
</tr>
<tr>
<td>Increase Slightly</td>
<td>31.7%</td>
<td>35.0%</td>
<td>36.3%</td>
<td>37.1%</td>
<td>41.1%</td>
<td>30.0%</td>
<td>30.0%</td>
<td>30.0%</td>
<td>30.0%</td>
</tr>
<tr>
<td>Remain the Same as Before</td>
<td>35.3%</td>
<td>44.6%</td>
<td>57.0%</td>
<td>54.3%</td>
<td>57.0%</td>
<td>56.1%</td>
<td>56.1%</td>
<td>56.1%</td>
<td>56.1%</td>
</tr>
<tr>
<td>Decrease Slightly</td>
<td>1.6%</td>
<td>3.2%</td>
<td>3.1%</td>
<td>1.6%</td>
<td>1.6%</td>
<td>3.4%</td>
<td>3.4%</td>
<td>3.4%</td>
<td>3.4%</td>
</tr>
<tr>
<td>Decrease Significantly</td>
<td>0.6%</td>
<td>0.7%</td>
<td>0.6%</td>
<td>0.6%</td>
<td>0.6%</td>
<td>0.4%</td>
<td>0.4%</td>
<td>0.4%</td>
<td>0.4%</td>
</tr>
</tbody>
</table>

**St. Louis MSA planned change in employment levels over the next 12 Months**

- **63% plan to hire in the next 12 months**
Shortage of applicants

Businesses Experiencing a Shortage of Skilled Applicants

- 2021: 66.3%
- 2019: 33.5%
- 2017: 30.9%
Barriers to growth

Shortage of workers with knowledge or skills still #1

- **2021**: 58%
- **2020**: 57%
- **2019**: 52%
- **2017**: 46%
- **2015**: 41%
- **2013**: 38%
- **2011**: 38%

- **Economic Conditions**
  - **2021**: 65%
  - **2020**: 50%
  - **2019**: 40%
  - **2017**: 35%
  - **2015**: 30%
  - **2013**: 27%
  - **2011**: 24%

- **Government Policies or Regulations**
  - **2021**: 36%
  - **2020**: 37%
  - **2019**: 35%
  - **2017**: 32%
  - **2015**: 22%
  - **2013**: 21%
  - **2011**: 12%

- **General COVID-related Issues**
  - **2021**: 29%
  - **2020**: 35%
  - **2019**: 45%
  - **2017**: 41%
  - **2015**: 41%
  - **2013**: 14%
  - **2011**: 16%

- **Lack of Childcare Access**
  - **2021**: 21%
  - **2020**: 14%
  - **2019**: 19%
  - **2017**: 14%
  - **2015**: 16%
  - **2013**: 13%
  - **2011**: 9%

- **Lack of Transportation Access**
  - **2021**: 23%
  - **2020**: 18%
  - **2019**: 15%
  - **2017**: 14%
  - **2015**: 14%
  - **2013**: 18%
  - **2011**: 7%
Barriers to Expanding Employment (Importance by Year)

- Government Policies or Regulations
- Shortage of Workers with Knowledge or Skills
- Economic Conditions
- General COVID-related Issues
- Shortage of Available Training Programs
- Lack of Childcare Access
- Lack of Transportation Access
- Lack of Information on Occupation

Yearly Importance:
- 2019
- 2020
- 2021
Methods for adding workers

- **80%** Hire New Full-time Employees
- **65%** Hire New Part-time Employees
- **14%** Use a Temporary Agency
- **13%** Hire Contract Workers
- **12%** Recall Furloughed Workers
- **10%** Recall Workers from a Lay-off List
Adding workers

80% plan to hire new full-time employees

- Hiring New Full-time Employees
  - 2021: 66%
  - 2020: 63%
  - 2019: 69%
  - 2017: 71%
  - 2015: 69%
  - 2013: 65%
  - 2011: 65%

- Hiring New Part-time Employees
  - 2021: 69%
  - 2020: 66%
  - 2019: 63%
  - 2017: 63%
  - 2015: 63%
  - 2013: 63%
  - 2011: 63%

- Using a Temporary Agency
  - 2021: 14%
  - 2020: 15%
  - 2019: 15%
  - 2017: 18%
  - 2015: 15%
  - 2013: 15%
  - 2011: 8%

- Hiring Contract Workers
  - 2021: 7%
  - 2020: 14%
  - 2019: 14%
  - 2017: 13%
  - 2015: 19%
  - 2013: 21%
  - 2011: 23%

- Recalling Furloughed Workers
  - 2021: 13%
  - 2020: 13%
  - 2019: 13%
  - 2017: 15%
  - 2015: 19%
  - 2013: 21%
  - 2011: 23%

- Recalling Workers from Lay-off List
  - 2021: 13%
  - 2020: 13%
  - 2019: 13%
  - 2017: 14%
  - 2015: 17%
  - 2013: 16%
  - 2011: 13%
Measures taken to address skill shortages

- 82% Hire Less Experienced and Train
- 66% Offer Increased Wages
- 52% Hire from Outside St. Louis
- 16% Hire Contractors
- 14% Invest in Automation
- 4% Hire from Outside the United States
Measures taken to address skill shortages

82% of companies forced to hire less experienced workers and train

66% are offering increased wages

<table>
<thead>
<tr>
<th>Measure</th>
<th>2021</th>
<th>2019</th>
<th>2017</th>
<th>2015</th>
<th>2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>Forced to hire less experienced and train</td>
<td>82%</td>
<td>79%</td>
<td>81%</td>
<td>83%</td>
<td>70%</td>
</tr>
<tr>
<td>Offering increased wages</td>
<td>66%</td>
<td>42%</td>
<td>40%</td>
<td>41%</td>
<td></td>
</tr>
<tr>
<td>Hiring from outside the local area or city</td>
<td>52%</td>
<td>24%</td>
<td>19%</td>
<td>25%</td>
<td>28%</td>
</tr>
<tr>
<td>Hiring contractors</td>
<td>24%</td>
<td>19%</td>
<td>20%</td>
<td>19%</td>
<td>28%</td>
</tr>
<tr>
<td>Invest in automation instead of hiring</td>
<td>14%</td>
<td>20%</td>
<td>20%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hiring from outside the United States</td>
<td>6%</td>
<td>4%</td>
<td>4%</td>
<td>4%</td>
<td>5%</td>
</tr>
</tbody>
</table>
Shortcomings seen in job applicants

- Poor Work Habits (Ethic)
  - 2021: 66%
  - 2019: 59%
  - 2017: 56%
  - 2013: 59%
  - 2011: 53%

- Lack of General Business or Industry Knowledge
  - 2021: 57%
  - 2019: 46%
  - 2017: 50%
  - 2013: 48%
  - 2011: 53%

- Lack of Critical Thinking and Problem Solving
  - 2021: 56%
  - 2019: 51%
  - 2017: 55%
  - 2013: 53%
  - 2011: 53%

- Lack of Communication or Interpersonal Skills
  - 2021: 59%
  - 2019: 52%
  - 2017: 56%
  - 2013: 55%
  - 2011: 53%

- Inability to Think Creatively
  - 2021: 44%
  - 2019: 42%
  - 2017: 44%
  - 2013: Question added in 2013

- Lack of Technical Skills Specific to the Job
  - 2021: 45%
  - 2019: 41%
  - 2017: 41%
  - 2013: 41%
  - 2011: 38%

Poor work habits still #1
Shortcomings seen in job applicants

Shortcomings Seen in Job Applicants in the Past 12 Months

- **65%** Poor Work Habits (Ethic)
- **57%** Lack of General Business or Industry Knowledge
- **56%** Lack of Critical Thinking and Problem Solving
- **53%** Lack of Communication or Interpersonal Skills
- **52%** Inability to Think Creatively
- **45%** Lack of Technical Skills Specific to the Job
- **44%** Unwillingness or Inability to Learn
- **42%** Lack of Teamwork or Collaboration
- **36%** Lack of Writing Skills
- **33%** Lack of Basic Math Skills
- **31%** Inability to Understand Written & Graphical Information
- **30%** Lack of General Computer Skills
- **28%** Inability to Pass a Drug Test
- **23%** Inability to Interact with Different Cultures & Backgrounds
Shortcomings seen in job applicants

Shortcomings Seen in Job Applicants (Importance by Year)
Educational skill levels

High-skill
requiring a four-year degree or higher

Middle-skill
requiring training or education beyond a high school diploma but less than a four-year degree

Low-skill
requiring a high school diploma or less
<table>
<thead>
<tr>
<th>Moderate/Long-Term Training to Associate Degree</th>
<th>Online Job Ads</th>
</tr>
</thead>
<tbody>
<tr>
<td>29-1141 Registered Nurses</td>
<td>21,599</td>
</tr>
<tr>
<td>53-3032 Heavy and Tractor-Trailer Truck Drivers</td>
<td>10,373</td>
</tr>
<tr>
<td>41-4012 Sales Representatives, Wholesale and Manufacturing</td>
<td>9,653</td>
</tr>
<tr>
<td>41-1011 First-Line Supervisors of Retail Sales Workers</td>
<td>6,513</td>
</tr>
<tr>
<td>49-9071 Maintenance and Repair Workers, General</td>
<td>4,677</td>
</tr>
<tr>
<td>31-1014 Nursing Assistants</td>
<td>4,279</td>
</tr>
<tr>
<td>11-9051 Food Service Managers</td>
<td>3,689</td>
</tr>
<tr>
<td>43-6014 Secretaries and Administrative Assistants</td>
<td>3,511</td>
</tr>
<tr>
<td>31-9092 Medical Assistants</td>
<td>3,308</td>
</tr>
<tr>
<td>29-2061 Licensed Practical and Licensed Vocational Nurses</td>
<td>3,270</td>
</tr>
<tr>
<td>51-9199 Production Workers, All Other</td>
<td>2,947</td>
</tr>
</tbody>
</table>
Skill levels required by employers

Average Skill Level Required to Meet Skill Shortages

<table>
<thead>
<tr>
<th>Skill Level</th>
<th>2017</th>
<th>2019</th>
<th>2021</th>
</tr>
</thead>
<tbody>
<tr>
<td>Low-skill</td>
<td>39%</td>
<td>37%</td>
<td>43%</td>
</tr>
<tr>
<td>Middle-skill</td>
<td>46%</td>
<td>45%</td>
<td>39%</td>
</tr>
<tr>
<td>High-skill</td>
<td>14%</td>
<td>18%</td>
<td>18%</td>
</tr>
</tbody>
</table>
## Top Basic Skills
- Communication Skills
- Teamwork / Collaboration
- Physical Abilities
- Organizational Skills
- Detail-oriented
- Problem Solving
- Microsoft Excel
- Planning
- Microsoft Office
- Computer Literacy

## Top Specialized Skills
- Customer Service
- Scheduling
- Sales
- Cleaning
- Patient Care
- Customer Contact
- Budgeting
- Repair
- Retail Industry Knowledge
- Data Entry

## Top Certificates
- Driver's License
- Registered Nurse
- Commercial Driver's License
- First Aid CPR AED
- Security Clearance
- Basic Life Saving
- Advanced Cardiac Life Support
- Licensed Practical Nurse
- Basic Cardiac Life Support
- American Heart Association

## Top Software Skills
- SQL
- Software Development
- Java
- Python
- Oracle
- SAP
- Software Engineering
- JavaScript
- Linux
- Salesforce
Methods for new or increased skill acquisition

- 94% On-the-job Training
- 65% Flexible Schedule for Continuing Education
- 56% In-house Classroom Training
- 42% Online Courses
- 34% Vendor Training
- 30% Tuition Reimbursement
- 21% Apprenticeship Programs
- 20% Vocational Training
- 18% Community College Customized Training
Methods for new or increased skill acquisition

On-the-job training remains #1
Skill shortages by business functional areas

- 74% Skilled Trades
- 67% Patient Care
- 55% Manufacturing Maintenance
- 45% Customer Service
- 27% Business Management
- 27% Information Technology
- 16% Accounting Finance
Skill shortages by business functional areas

Firms Reporting Applicant Shortages in Functional Areas

- Skilled Trades: 57% (2017), 57% (2019), 60% (2020), 74% (2021)
- Patient Care: 36% (2017), 56% (2019), 53% (2020), 67% (2021)
- Accounting / Finance: 13% (2017), 17% (2019), 18% (2020), 16% (2021)
Skill shortages by business functional areas

Applicant Skill Levels Sought

- Skilled Trades: Low-skill (54%), Middle-skill (28%), High-skill (14%)
- Patient Care: Low-skill (52%), Middle-skill (20%), High-skill (18%)
- Manufacturing / Maintenance: Low-skill (42%), Middle-skill (47%), High-skill (11%)
- Information Technology: Low-skill (47%), Middle-skill (10%), High-skill (43%)
- Customer Service: Low-skill (46%), Middle-skill (43%), High-skill (11%)
- Accounting / Finance: Low-skill (45%), Middle-skill (22%), High-skill (34%)
- Business Management: Low-skill (43%), Middle-skill (25%), High-skill (32%)
Increasing opportunities

Employers with Jobs at Specified Experience Levels

- No experience: 54% (2015), 62% (2017), 56% (2019), 51% (2020), 52% (2021)
- Some experience, but less than 1 year: 60% (2015), 55% (2017), 61% (2019), 52% (2020), 57% (2021)
- A minimum of 1 to 3 years of experience: 65% (2015), 68% (2017), 67% (2019), 60% (2020), 65% (2021)
- A minimum of 4 or more years of experience: 52% (2015), 56% (2017), 60% (2019), 47% (2020), 55% (2021)
Increasing opportunities

Employers with Jobs at Specified Education Levels

<table>
<thead>
<tr>
<th>Education Level</th>
<th>2017</th>
<th>2019</th>
<th>2020</th>
<th>2021</th>
</tr>
</thead>
<tbody>
<tr>
<td>Low-skill Education</td>
<td>85%</td>
<td>85%</td>
<td>66%</td>
<td>70%</td>
</tr>
<tr>
<td>Middle-skill Education</td>
<td>62%</td>
<td>64%</td>
<td>63%</td>
<td>71%</td>
</tr>
<tr>
<td>High-skill Education</td>
<td>42%</td>
<td>45%</td>
<td>49%</td>
<td>55%</td>
</tr>
</tbody>
</table>
Increasing opportunities

Jobs Available with Short-Term Training

- 31% in 2019 (No Jobs)
- 28% in 2020 (1% to 49% of Jobs)
- 22% in 2021 (1% to 49% of Jobs)
- 35% in 2019 (1% to 49% of Jobs)
- 37% in 2020 (1% to 49% of Jobs)
- 43% in 2021 (50% to 100% of Jobs)
- 33% in 2019 (50% to 100% of Jobs)
- 40% in 2020 (50% to 100% of Jobs)

78% have jobs available with short-term training
Employment barriers

Companies Requiring Pre-employment Screening Checks

- Criminal check: 74%
- Drug screen: 52%
- Professional license or certification check: 50%
- eVerify check: 42%
- Social media check: 29%
- Financial check: 16%
- Check by an outside service: 31%
Employment barriers

Employer Positions for Justice-involved Individuals

- Would Not Consider: 26% (2015), 20% (2019), 18% (2020), 0% (2021)
- Depends on Felony: 46% (2015), 42% (2019), 54% (2020), 50% (2021)
Workforce initiatives being considered for next year

- Cross-training and knowledge transfer: 2021: 72%, 2020: 42%
- Increased employee care and engagement: 2021: 70%, 2020: 38%
- Increased hiring to accommodate demand: 2021: 67%, 2020: 45%
- New ways to serve customers: 2021: 66%, 2020: 48%
- Reskilling or upskilling employees to new ways of working: 2021: 65%, 2020: 36%
- New learning and skill training delivery methods: 2021: 56%, 2020: 30%
- Technology investments: 2021: 55%, 2020: 30%
- Increased agility in product and service offerings: 2021: 55%, 2020: 39%
- Flexible working: 2021: 54%, 2020: 33%
- Succession planning: 2021: 53%, 2020: 28%
- Leaner operations: 2021: 44%, 2020: 25%
- Reorganization or restructuring: 2021: 39%, 2020: 23%
- Job and task automation implementation: 2021: 28%, 2020: 16%
- Remote working: 2021: 21%, 2020: 21%
- Reduction in workforce: 2021: 8%, 2020: 11%

All increased from 2020 except remote working.
Remote work

Do you currently have employees working remotely?

<table>
<thead>
<tr>
<th>Year</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>2020</td>
<td>61.3%</td>
</tr>
<tr>
<td>2021</td>
<td>22.9%</td>
</tr>
</tbody>
</table>

Expected Change in Number of Remote Workers over the Next 12 Months

- Increase: 10%
- Stay the same: 49%
- Decrease: 41%
Employer’s Top Concerns for the Future

1. Attracting or retaining talent
2. Financial impacts on operations
3. Supply chain disruptions
4. Employee mental health issues or stress
5. U.S. or global recession
6. Cash flow and finding capital
7. Lower productivity
8. Consumer concerns about COVID
9. Employee concerns about COVID
10. Lack of information for decision making
11. Decreased consumer spending
12. Tax or trade uncertainties
13. Workforce reductions
63% of employers are looking to hire.

Middle-skill jobs are the most in demand.

Equitable recovery. opportunity. growth.

Employers are hiring for jobs that require short-term training.

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2021 STATE OF THE ST. LOUIS WORKFORCE

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