REGIONAL SNAPSHOT

SEMO Region, Missouri

PURDUE UNIVERSITY

Center for Regional Development
Advancing Collaboration : Energizing Regions
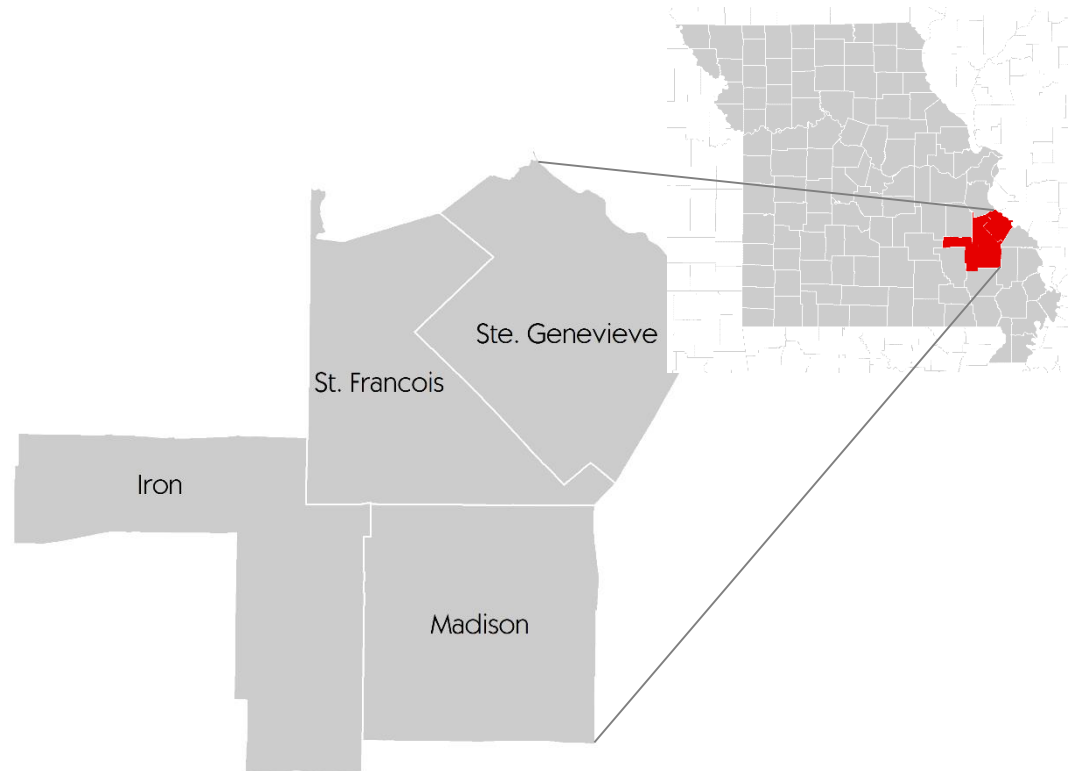
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01
overview

SEMO Region

What is a regional snapshot?

SEMO Region

The SEMO region is comprised of four Missouri counties. Ste. Genevieve County forms the border with Illinois.

- Iron
- Madison
- Ste. Genevieve
- St. Francois

What is a regional snapshot?

What is the snapshot?

This snapshot is a demographic and economic assessment of the SEMO Region in Missouri. Using county-level data, PCRD analyzed a number of indicators to gauge the overall economic performance of the SEMO Region in comparison to the rest of the state.

What is its purpose?

The snapshot is intended to inform the region's leaders, organizations and residents of the key attributes of the region's population and economy. In particular, it takes stock of the region's important assets and challenges. With such data in hand, regional leaders and organizations are in a better position to invest in the mix of strategies that will spur the growth of the economy and provide a higher quality of life for residents of the region.

What are its focus areas?

PCRD secured and analyzed recent data from both public and private sources to generate the snapshot. In order to build a more comprehensive picture of the region, the report presents information under four key categories.

- Demography
- Human Capital
- Labor Force
- Industry and Occupation

When appropriate or relevant, the report compares information on the region with data on the remainder of the state. By so doing, the region is better able to determine how well it is performing relative to the state on a variety of important metrics.

02
demography

- Population change
- Race/Ethnicity
- Population age structure
- Income and poverty

Population change

Total population projections

- SEMO Region
- Rest of Missouri

2000
- 95,980
- 5,499,231

2000-2010
- 10.8% — 106,360
- 7.0% — 5,882,567

2010-2014
- 0.1% — 106,509
- 1.3% — 5,957,080

2014-2020
- 2.8% — 109,525
- 5.4% — 6,280,325
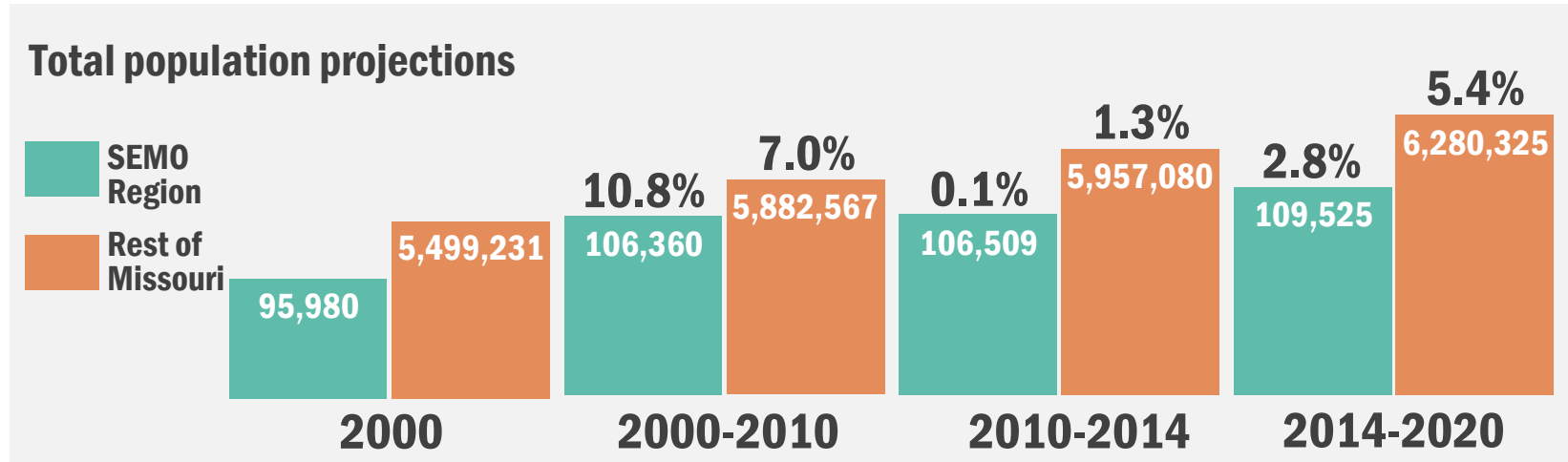
Questions:

How does the region's population trend compare to that of the rest of the state?

What may be some of the elements driving the trends in the region? In the rest of the state?

What strengths or challenges might these trends present?
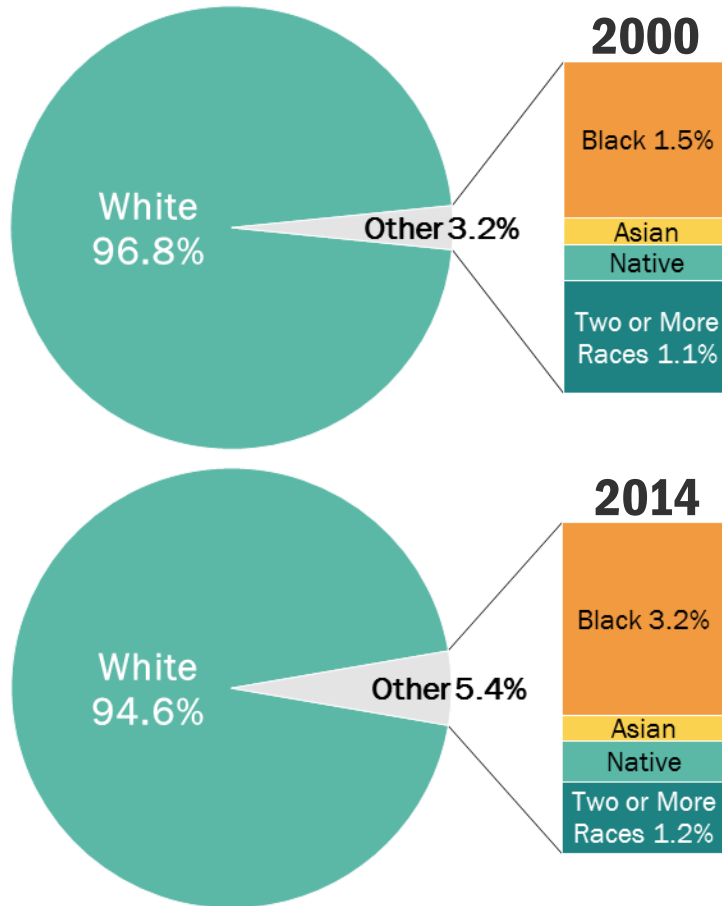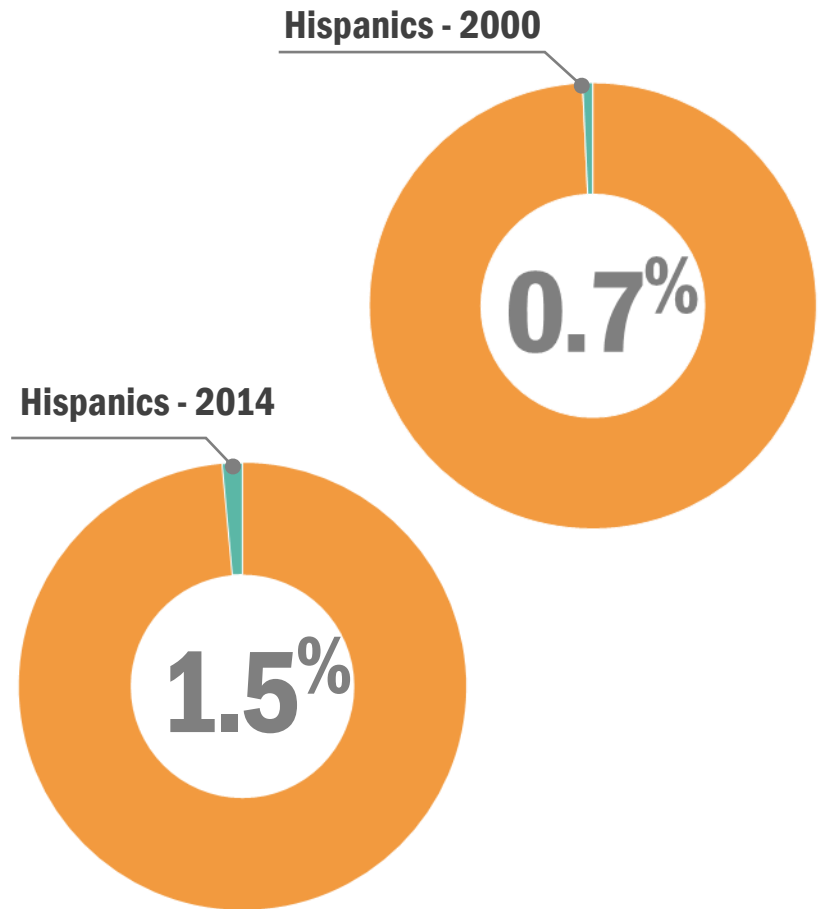
section 02

Race

Ethnicity

2000

White 96.8%

Other 3.2%

Black 1.5%

Asian

Native

Two or More Races 1.1%

2014

White 94.6%

Other 5.4%

Black 3.2%

Asian

Native

Two or More Races 1.2%

Hispanics - 2000

0.7%

Hispanics - 2014

1.5%

section 02

Population age structure, 2000

Percent of Population

Age	Rest of Missouri	SEMO
80+	3.7	4.1
70-79	6.2	7.1
60-69	7.7	9.0
50-59	11.2	11.4
40-49	15.0	14.9
30-39	14.7	14.3
20-29	13.1	11.8
10-19	14.8	14.7
00-09	13.8	12.7

section 02

Population age structure, 2014

Age	Rest of Missouri	SEMO
80+	4.0	4.1
70-79	6.4	7.3
60-69	11.0	11.2
50-59	14.3	14.8
40-49	12.3	13.0
30-39	12.6	12.9
20-29	13.8	12.9
10-19	13.0	12.1
00-09	12.6	11.8

Percent of Population
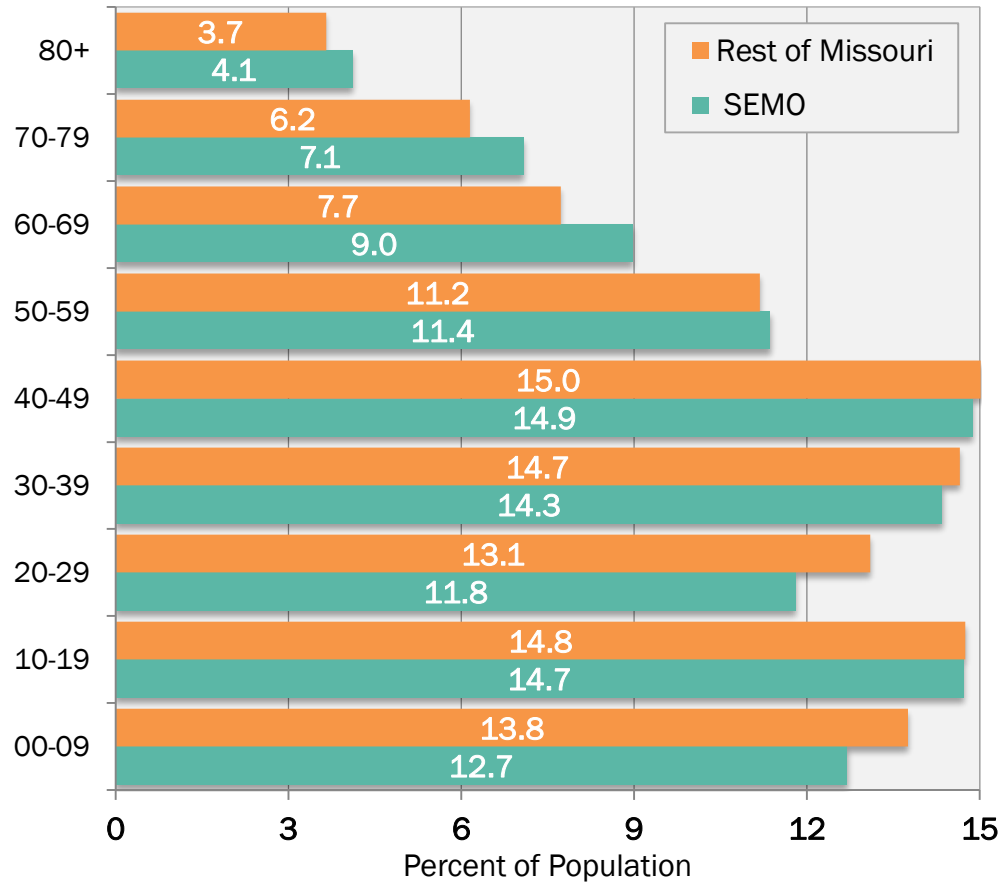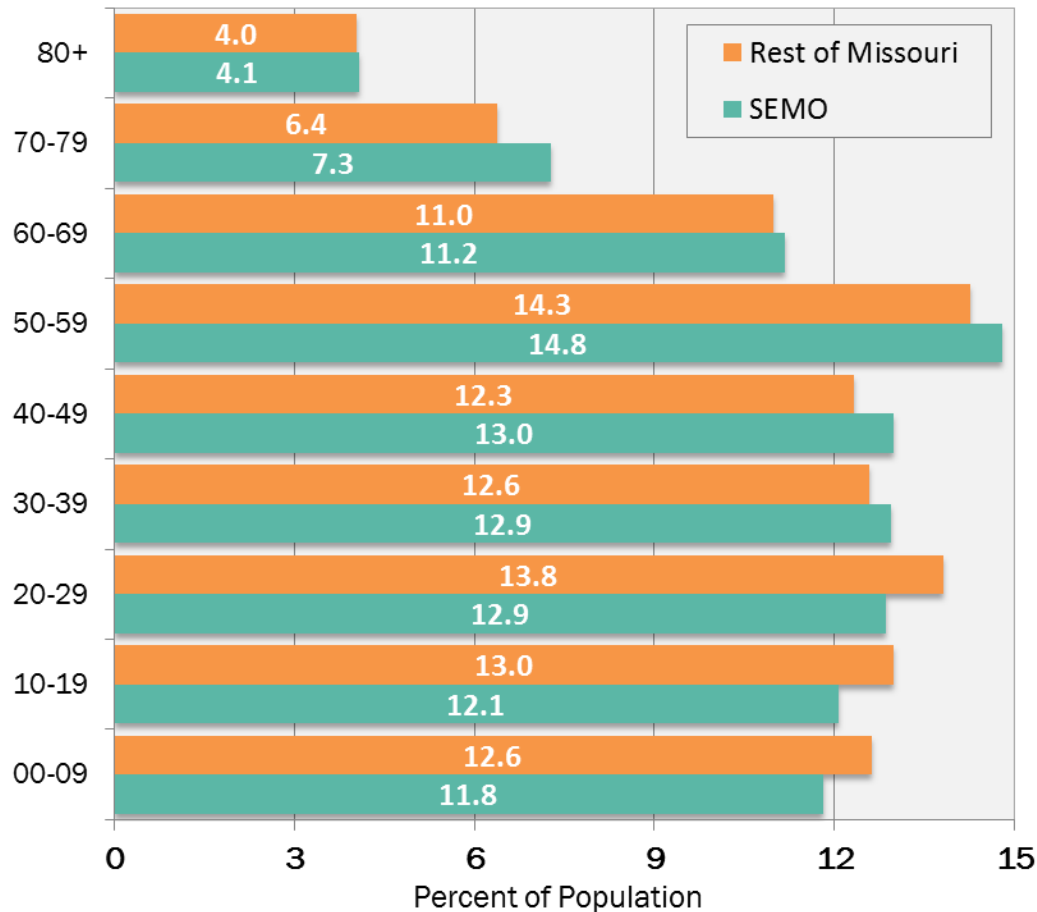
Questions:

- Is the region experiencing an aging of its population? How does this compare to the rest of the state?

- Is there a sizable number of people of prime working age (20-49 years of age) in the region? Has it grown or decline since 2000?

- Is the youth population (under 20 years old) growing or declining?

- What are the implications of the region's age structure for the economic development efforts of the region?

section 02

Income and poverty

	2003	2008	2013
Total Population in Poverty	13.7%	16.2%	19.4%
Minors (Age 0-17) in Poverty	20.1%	23.1%	27.5%
Real Median Household Income* ($ 2013)	$42,201	$41,625	$38,584

Questions:

- Is the poverty rate for individuals in the county getting better or worse?

- Is poverty for minors in the county lower or higher than the overall poverty rate for all individuals? Why?

- Has real median income (adjusted for inflation) improved or worsened over the 2003 to 2013 time period? What may be reasons for these changes?

section 02

* Note: Regional Median Household income is the population-weighted average of median household income values across counties in SEMO region.

03
human
Capital

Educational attainment

Graduation rate

Patents

Educational attainment, 2013

SEMO Region

- No high school — 7%
- Some high school — 14%
- High school diploma — 35%
- Some college — 24%
- Associate's degree — 8%
- Bachelor's degree — 8%
- Graduate degree — 4%

Rest of Missouri

- No high school — 4%
- Some high school — 8%
- High school diploma — 31%
- Some college — 23%
- Associate's degree — 7%
- Bachelor's degree — 17%
- Graduate degree — 10%

Legend:
- No high school
- Some high school
- High school diploma
- Some college
- Associate's degree
- Bachelor's degree
- Graduate degree

Questions:

- What proportion of the adult population in the region has only a high school education?

- How many are college graduates (bachelors degree or higher)?

- How does the educational profile of the region compare to that of the rest of the state?

- What are the implications of the educational profile of the region in terms of the region's economic opportunities or workforce challenges?

section 03

Patents

Patents per 1,000 Jobs
2001-2013

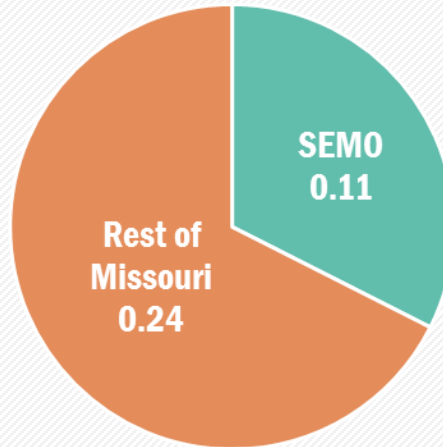From 2001 to 2013, SEMO region were issued patents at a rate of 0.11 per 1,000 jobs, while the remaining Missouri counties garnered 0.24 patents per 1,000 jobs.

SEMO 0.11

Rest of Missouri 0.24

Patents per 1,000 residents
2001-2013

SEMO 0.05

Rest of Missouri 0.14

From 2001 to 2013, 0.05 patents per 1,000 residents were issued in SEMO region. The rest of Missouri amassed 0.14 patents per 1,000 residents.
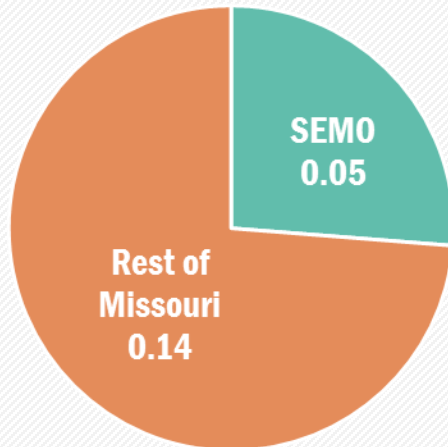
Patenting trends are an important indicator of the level of innovation in a region.

Commercializing this innovation can lead to long-term growth for regional economies.

Questions:

- How does the region's patent rate compare to that of the state?

- How have rates changed over time?

- What might this data suggest for the future of the region?

section 03

04
labor force

Unemployment rates

Earnings per worker

Source of labor for the region

Earnings per worker in 2014

Questions:

- How does the region's average earnings compare to that of the rest of the state?

- What might be some driving factors for the differences?

- Do these represent potential strengths or challenges for the region?

NOTE: Earnings include wages, salaries, supplements and earnings from partnerships and proprietorships.

SEMO region
Rest of Missouri

$50,000
$40,000
$30,000
$20,000
$10,000
$0

$36,758
$47,278

Average earnings

section 04
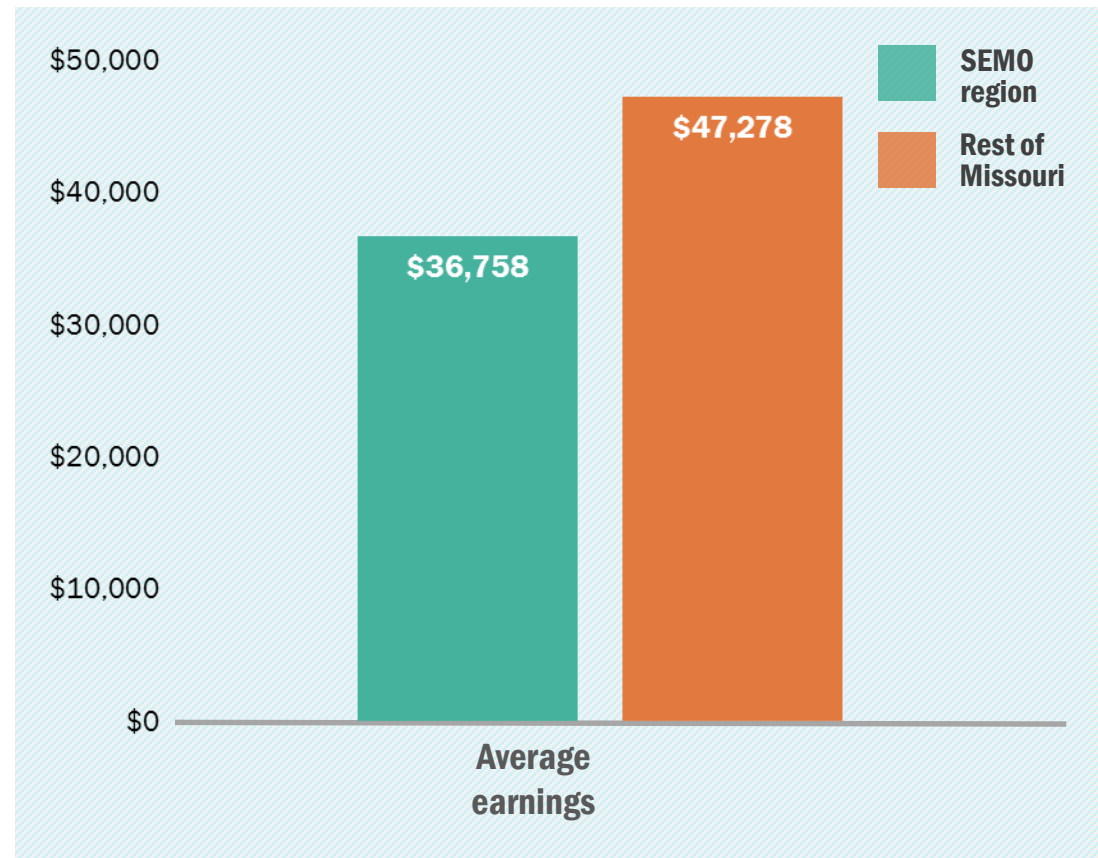
Journey to Work

In-Commuters

13,009

Same Work/Home

24,395

Out-Commuters

16,154
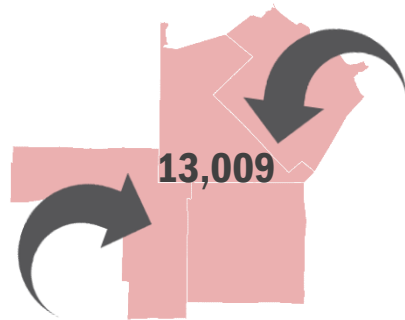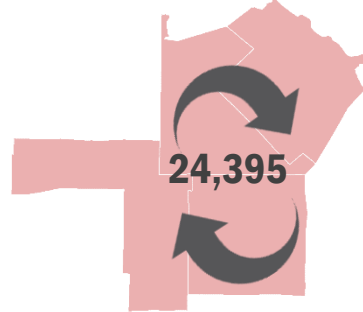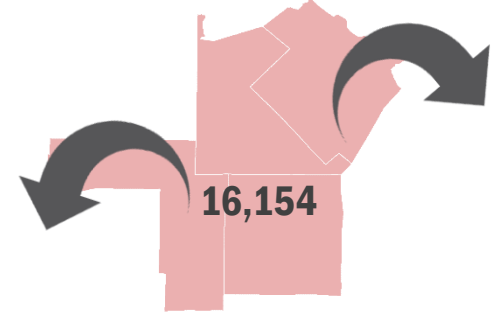
Population	2013 Jobs	Proportion
Employed in Region	37,404	100.0%
Employed in Region but Living Outside	13,009	34.8%
Employed and Living in Region	24,395	65.2%

Population	2013 Jobs	Proportion
Region Residents	40,549	100.0%
Employed Outside Region but Living in Region	16,154	39.8%
Employed and Living in Region	24,395	60.2%

Questions:

- Are more people commuting in or commuting out of the region to work?
- How does this compare with those that work and live in the region?
- What are the implications for the region's economic development?

section 04

05
industry and occupation

Industry and occupation

Establishments

Components of Change for Establishments 2000-2011

Establishments Launched	7,227
Establishments Closed	4,705
Net Change	2,522
Net Migration	101
Total Change	2,623
Percent Change	62.70%

An establishment is a physical business location.

Branches, standalones and headquarters are all considered types of establishments.

Definition of Company Stages

0 Self-employed

1 2-9 employees

2 10-99 employees

3 100-499 employees

4 500+ employees

section 05

Note: In-migration and Out-migration includes movement within the EC IN region.

Establishments

Number of Establishments by Company Stages

Stage	2000		2011	
	Establishments	**Proportion**	**Establishments**	**Proportion**
Stage 0	1,157	27.45%	2,388	34.82%
Stage 1	2,377	56.39%	3,732	54.42%
Stage 2	630	14.95%	685	9.99%
Stage 3	47	1.12%	48	0.70%
Stage 4	4	0.09%	5	0.07%
Total	**4,215**	**100%**	**6,858**	**100.00%**

Questions:

- What stage businesses have shaped the region's economic growth in the last 10 years?

- Which ones are growing or declining the most?

- How might these trends shape the region's future economic growth?

section 05

Establishments

Number of Jobs by Company Stages

Year	2000	2011	% Change
Stage 0	1,157	2,388	106.40%
Stage 1	8,487	11,433	34.71%
Stage 2	15,916	17,505	9.98%
Stage 3	8,883	8,864	-0.21%
Stage 4	2,690	2,920	8.55%
Total	**37,133**	**43,110**	**16.10%**

Sales ($ 2011) by Company Stages

Year	2000	2011	% Change
Stage 0	$133,495,479	$191,556,956	43.5%
Stage 1	$1,015,312,049	$899,028,968	-11.5%
Stage 2	$1,685,326,918	$1,423,006,188	-15.6%
Stage 3	$1,181,832,231	$937,562,547	-20.7%
Stage 4	$388,174,959	$235,111,400	-39.4%
Total	**$4,404,141,635**	**$3,686,266,059**	**-16.3%**

Questions:

- What establishments are the most numerous based on company stages?

- What stages have experienced the largest growth? The greatest decline?

- What company stage employs the largest number of people?

- What stage captures the most sales?

- Which ones have experienced the greatest percentage loss over the 2001-11 period?

section 05

Top ten industry sector employment growth

NAICS	Description	2009 Jobs	2014 Jobs	Change	Change (%)	State Change (%)
55	Management of Companies and Enterprises	64	146	82	128%	9%
48	Transportation and Warehousing	1,444	2,115	671	46%	5%
53	Real Estate and Rental and Leasing	1,295	1,649	354	27%	15%
62	Health Care and Social Assistance	5,570	6,704	1134	20%	16%
11	Crop and Animal Production	2,066	2,434	368	18%	-1%
71	Arts, Entertainment, and Recreation	475	541	66	14%	17%
51	Information	320	362	42	13%	-14%
54	Professional, Scientific, and Technical Services	908	1,010	102	11%	8%
56	Administrative and Support and Waste Management and Remediation Services	1,768	1,966	198	11%	16%
21	Mining, Quarrying, and Oil and Gas Extraction	1,408	1,506	98	7%	4%

Questions: What regional industry sectors have seen the greatest growth?
Did they grow at the same rate as the state?

What factors are causing the growth?

section 05

Top ten industry sector employment decline

NAICS	Description	2009 Jobs	2014 Jobs	Change	Change (%)	State Change (%)
22	Utilities	222	165	-57	-26%	-7%
31	Manufacturing	4,233	3,258	-975	-23%	1%
23	Construction	3,515	2,828	-687	-20%	-8%
81	Other Services (except Public Administration)	3,350	2,874	-476	-14%	-2%
61	Educational Services	239	209	-30	-13%	15%
42	Wholesale Trade	1,313	1,279	-34	-3%	4%
90	Government	8,976	9,155	179	2%	-3%
44	Retail Trade	5,213	5,349	136	3%	0%
72	Accommodation and Food Services	2,905	3,023	118	4%	8%
52	Finance and Insurance	1,930	2,062	132	7%	13%

Questions:
- How does the industry sector make-up of the region compare to the rest of the state?
- Which industry sectors are growing and declining the most in employment?

section 05

How to interpret cluster data results

The graph's four quadrants tell a different story for each cluster.

Contains clusters that are more concentrated in the region but are declining (negative growth). These clusters typically fall into the lower quadrant as job losses cause a decline in concentration.

Contains clusters that are more concentrated in the region and are growing. These clusters are strengths that help a community stand out from the competition. Small, high-growth clusters can be expected to become more dominant over time.

Mature
Top left
(strong but declining)

Stars
Top right
(strong and advancing)

Transforming
Bottom left
(weak and declining)

Emerging
Bottom right
(weak but advancing)

Contains clusters that are under-represented in the region (low concentration) and are also losing jobs. Clusters in this region may indicate a gap in the workforce pipeline if local industries anticipate a future need. In general, clusters in this quadrant show a lack of competitiveness.

Contains clusters that are under-represented in the region but are growing, often quickly. If growth trends continue, these clusters will eventually move into the top right quadrant. Clusters in this quadrant are considered emerging strengths for the region.

section 02

Distribution of clusters in the Region by quadrants

Industry cluster analysis

Mature Clusters

Mining (12.3; 1,720)

Glass & Ceramics (7.4; 600)

Chemicals/Chemical-based Products (2.3; 1,293)

Forest & Wood Products (1.4; 961)

Fabricated Metal Product Mfg. (1.2; 456)

Machinery Manufacturing (1.1; 350)

Star Clusters

Agribusiness, Food Processing & Tech (1.7; 2,413)

Biomed/Biotechnical (Life Science) (1.1; 4,198)

Transportation & Logistics (1.1; 1,586)

Level of Specialization

Percent Growth in Specialization

Transforming Clusters

Energy(Fossil & Renewable) (0.9; 2,154)

Advanced Materials (0.8; 1,138)

Mfg. Supercluster (0.6; 905)

Apparel & Textiles (0.6; 196)

Arts, Entertainment., Recreation. & Visitor Industries (0.5; 944)

Printing & Publishing (0.5; 383)

Defense & Security (0.4; 801)

Education & Knowledge Creation (0.3; 271)

Emerging Clusters

Business & Financial Services (0.5; 2,980)

Information Technology & Telecom. (0.2; 343)

Transportation Equipment Mfg. (0.2; 78)

NOTE: The first number (fractions and real numbers) after each cluster represents its location quotient while the second number represents the number of total jobs (full and part time jobs by place of work) in that cluster in the region. The clusters are sorted in decreasing order by location quotient.
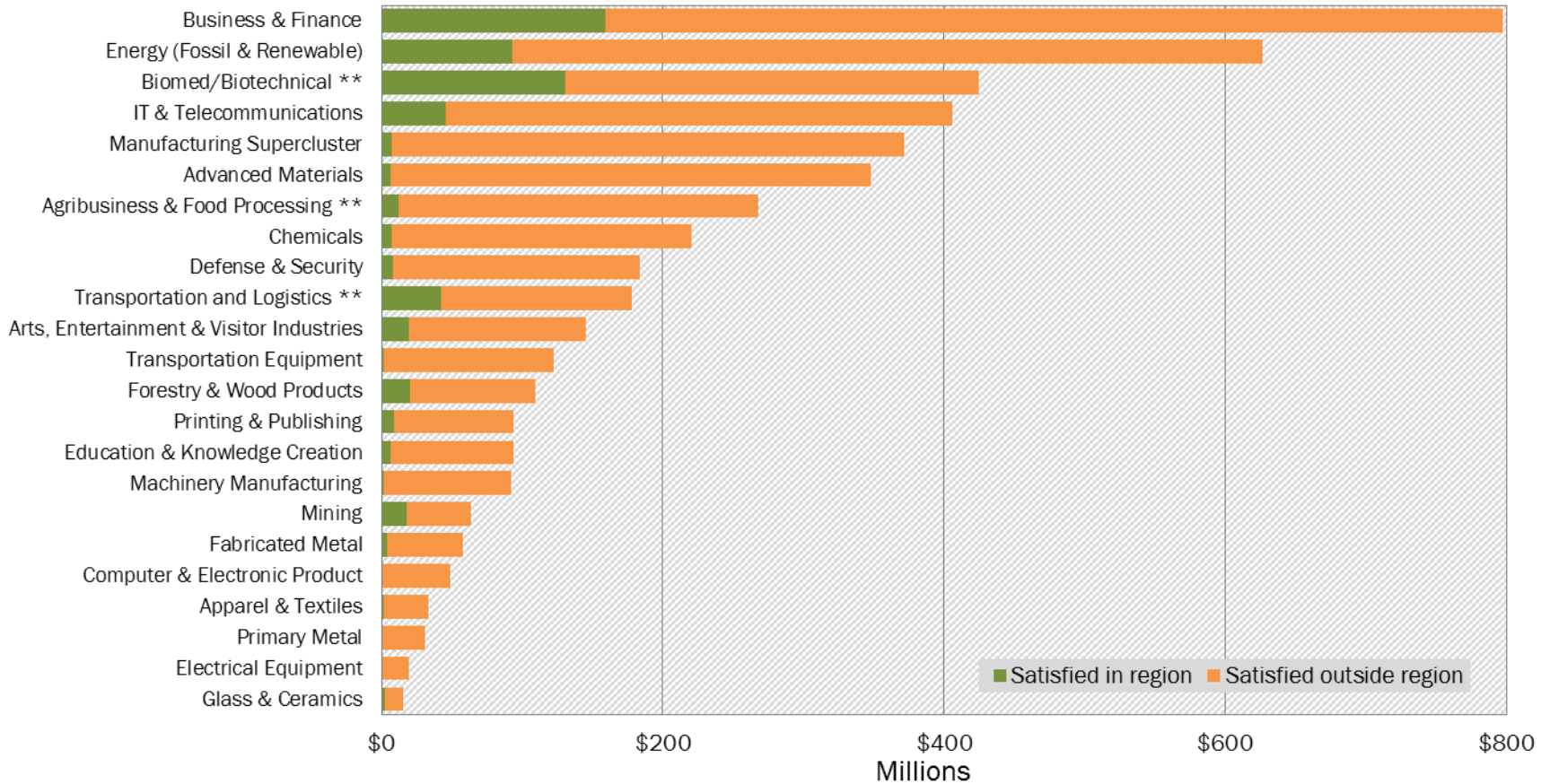
Note: Computer & Electronic Product does not exist; Electrical Equipment & Appliances and Primary Metal Mfg. have too less number of jobs.
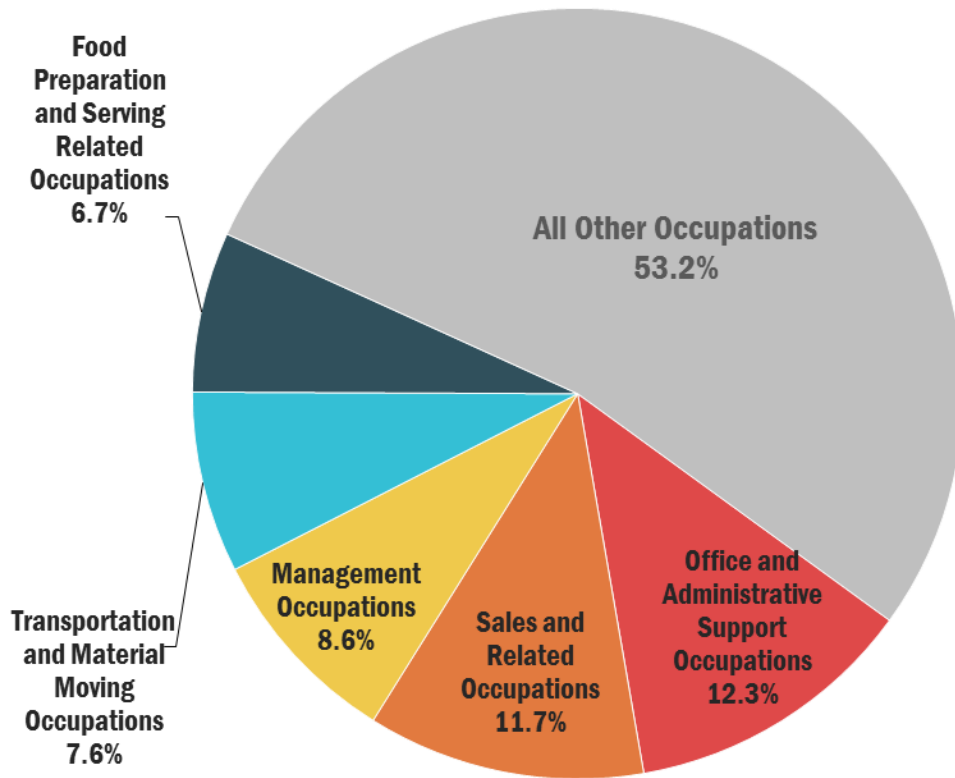
section 02

Regional requirements, 2013

Chart: Horizontal stacked bar chart showing regional requirements in Millions ($0 to $800), with categories "Satisfied in region" (green) and "Satisfied outside region" (orange).

Industry Cluster	
Business & Finance	
Energy (Fossil & Renewable)	
Biomed/Biotechnical **	
IT & Telecommunications	
Manufacturing Supercluster	
Advanced Materials	
Agribusiness & Food Processing **	
Chemicals	
Defense & Security	
Transportation and Logistics **	
Arts, Entertainment & Visitor Industries	
Transportation Equipment	
Forestry & Wood Products	
Printing & Publishing	
Education & Knowledge Creation	
Machinery Manufacturing	
Mining	
Fabricated Metal	
Computer & Electronic Product	
Apparel & Textiles	
Primary Metal	
Electrical Equipment	
Glass & Ceramics	

Legend: ■ Satisfied in region ■ Satisfied outside region

X-axis: Millions

* *Note: current Star clusters

section 05

Top five occupations in 2014

Pie chart showing:
- All Other Occupations 53.2%
- Office and Administrative Support Occupations 12.3%
- Sales and Related Occupations 11.7%
- Management Occupations 8.6%
- Transportation and Material Moving Occupations 7.6%
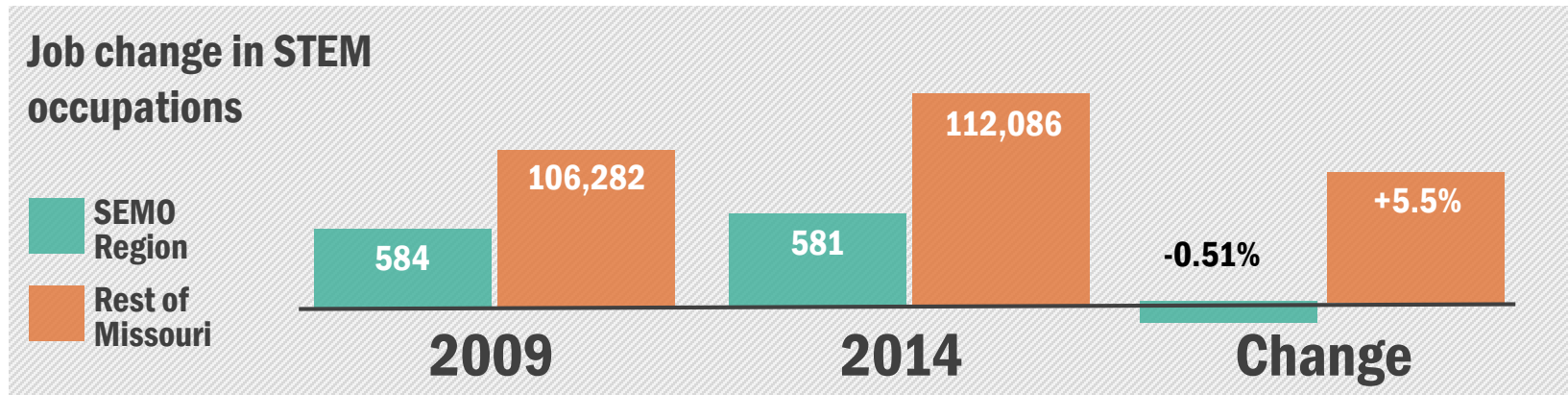- Food Preparation and Serving Related Occupations 6.7%

Questions:

- What are the education and skill requirements for these occupations?

- Do the emerging and star clusters align with the top occupations?

- What type salaries do these occupations typically provide?

Source: EMSI Class of Worker 2014.4 (QCEW, non-QCEW, self-employed and extended proprietors)

Science, Technology, Engineering & Math

Job change in STEM occupations

- SEMO Region (teal)
- Rest of Missouri (orange)

	2009	2014	Change
SEMO Region	584	581	-0.51%
Rest of Missouri	106,282	112,086	+5.5%

Questions:

- How do STEM jobs compare to the state?

- What has been the trend of STEM jobs over time?

- How important are STEM jobs to the region's Star and Emerging clusters?

*Note: STEM and STEM-related occupation definitions from BLS (2010)

section 05

Source: EMSI Class of Worker 2014.4 (QCEW, non-QCEW, self-employed and extended proprietors)

Report Contributors

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PURDUE UNIVERSITY | **Center for Regional Development**
Advancing Collaboration : Energizing Regions

The Purdue Center for Regional Development (PCRD) seeks to pioneer new ideas and strategies that contribute to regional collaboration, innovation and prosperity.

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