



Houston, Missouri Workforce Market Study

City of Houston
Economic Development

October 2019



Study Overview:

Houston Missouri is an employment hub for Texas County. The Houston ZIP area has approximately 5,300 residents with just over 2,900 in the employment age range from 15-69. Of this working age population, just over 1,700 are employed on a full-time basis while there are more than 2,500 reported jobs. Houston is a net importer of employees.

Houston is centered in Texas County and most of the county is at or within thirty minutes' drive of the city. In essence, the entire potential labor market of the county is available to Houston employers.

Houston sits in the center of eight surrounding counties. Five of those, on the east, south and west, are generally rural like Texas County and easily accessed. West Plains in Howell County directly south is a major employment center and a competitor for labor. The three other counties across the northeast and northwest corners and north are along Interstate-44. They have several much larger cities, greater employment and overall higher wages. However, those larger population centers are an hour or more from Houston.

Given the strong economy in the Houston area, the state of Missouri and across the United States, labor availability for existing employers and for new employers is a key concern. To help establish the potential of available labor, the City of Houston economic Development **department contracted with O'Brian & Associates to conduct a workforce market study of Houston.**

The study consisted of three major parts, plus a secondary report on talent availability to assist employers and economic development representatives in determining labor availability for key jobs in three major employment sectors.

The first part is an extensive look at the demographics and employment in Houston and in its home of Texas County. Additionally, the same information was developed for the five surrounding more rural counties (Dent, Douglas, Howell, Shannon and Wright) to create, with a Texas County, a Six-County Regional overview. Additionally, the three more populous north tier counties were added to create a Nine-County Overview.

The second part is a survey of Houston area firms. This survey was done in two steps. First was one-on-one confidential meetings with four area employers; two each in the key sectors of health care and manufacturing. From those meetings a final survey was drafted and distributed to employers through an on-line process with the Houston Chamber of Commerce. This was not intended to be a statistically accurate survey, but a snapshot of how employers perceive operating in the Houston area. In all, twenty-seven (27) employers of all sizes took part in the survey, providing good information from which to help develop a survey of area residents.

The third part is a survey of Houston area residents. This survey was conducted June through August to area residents in the age ranges of 15-69. The survey was conducted through social media targeted to the geography and ages. The link to the survey was promoted by the local newspaper, Houston Herald, both in print and on-line. In addition,

the link to the survey was distributed by the Houston Chamber. These efforts were supplemented by in-person surveys conducted at several local popular and high traffic locations specifically: Millers Grill, Piney River Brewing and Walmart. In addition, senior level students (typically age 17) at Houston High School and employees at Durham Manufacturing also participated in-person. Overall, the survey was well balanced across age groups, with a slight female demographic bias due to the 15-19 and 64-19 age groups response rates.

The survey has a confidence level of 95%, with a 5.5% +/- margin of error.

The secondary, and separate, part of the study is a “Talent by Compensation” report. This looks at the availability of labor based on a median wage for a given job and the number of people available for that job. The number available includes those with the specific job title, those currently employed in jobs with a ninety percent (90%) and seventy-five (75%) compatibility of skills and those who are available to work.

Executive Summary:

Houston is a net job importer. There are more than 2,500 job positions in the Houston ZIP, while just over 1,700 residents are employed.

Texas County is the largest, by square miles, county in Missouri. With its location in the middle of the county, **Houston's primary labor shed area of up to thirty (30) minutes is** entirely within the county.

Houston's primary employment sectors are Government, Retail, Manufacturing, Food Service & Accommodations and Health Care & Social Services. It should be noted that the major healthcare employer, Texas County Memorial Hospital, is county-owned which overstates Government and understates Health Care.

The above employment sectors are also the top five sectors in the Six-County Region and the Nine-County Region. In Texas County, Construction replaces Food Service.

Houston employers are generally happy with their employees giving a ranking of 3.9 on a 5 scale when asked about quality of workforce.

However, employers are more neutral on Availability of Workforce and Skills of New Hires. Both of these received a 2.9 ranking on a 5 scale.

Houston employers noted "better pay" and, to a lesser extent, "better benefits" as key reasons people leave for a new job.

In terms of recruiting and retaining employees, companies pointed out consideration of better benefit packages and higher pay levels as steps they have, or are contemplating, taking.

Employers noted better skills training in the area would be a benefit, with several commenting that efforts were already underway to expand the area options. Basic employment (soft) skills were also noted as areas where more training is needed.

Wages in Houston are very competitive in relation to the Six-County and Nine-County regions and to the state. However, those very competitive wages are from seven percent (7%) to twenty-three percent (23%) lower than surrounding counties, depending on business sector and county. The north tier of counties along Interstate-44 have the highest wages, followed by Howell County to the south.

Residents in the 15 to 69 age brackets are generally satisfied with their employment with full-time people more so than part-time.

However, more than sixty percent (60%) of those currently employed (full and part time) are actively seeking or could be interested in new job opportunities.

Additionally, there is approximately eight percent (8%) of the population in Houston and the broader region that is currently not employed but would consider coming back into the labor

force. This group, which is comprised of homemakers, retired and disabled, is about equally between those would seek full-time employment and those who want only part-time work.

Including all categories, the potential labor markets are:

Houston:	833 Full-time	455 Part-time
Texas County:	5,189 Full-time	3,355 Part-time
45 min. Commute:	9,667 Full-time	6,167 Part-time

(The study did not differentiate PT employees who are seeking FT work)

For both those currently employed and those who would consider coming back into the **workforce, “better pay” is the key driver of interest.**

At lower wage levels, current and potential employees indicate they are unlikely to drive more than twenty minutes; many indicated less than ten minutes. This part of the labor market is entirely encompassed within Texas County.

The county average wage of \$16.30 an hour correlates to the \$15.00 - \$16.99 wage range where residents split with about half saying they would commute no more than thirty minutes and half saying they would commute for forty minutes or more.

In the 20 minutes to 40 minutes commute time, Houston employers are competing for workforce with communities where companies pay higher wages. For example, West Plains in Howell County is, like Houston, a net employee importer and is forty-five minutes away. For residents at the south end of Texas County, West Plains and Houston are a similar commute.

The Talent by Compensation report, while highlighting a few key jobs in three employment sectors, does give employers a view on compatible job titles and trainable workers if they maintain the current wage (median) or look at adjustments to take in the broader Six-County or Nine-County regions.

Demographics



Houston ZIP
Texas County
Six-County Region
Nine-County Region

Economy Overview

Population

City of Houston (ZIP)

5,343

Population (2018)

Population grew by 7 over the last 5 years and is projected to grow by 6 over the next 5 years.

2,537

Total Regional Employment

Jobs decreased by 73 over the last 5 years but are projected to grow by 103 over the next 5 years.

\$34.5K

Avg. Earnings Per Job (2018)

Regional average earnings per job are \$32.4K below the national average earnings of \$66.9K per job.

Texas County

25,789

Population (2018)

Population grew by 119 over the last 5 years and is projected to grow by 141 over the next 5 years.

6,664

Total Regional Employment

Jobs decreased by 377 over the last 5 years but are projected to grow by 59 over the next 5 years.

\$35.6K

Median Household Income (2017)

Median household income is \$22.1K below the national median household income of \$57.7K.

Six-County Region

121,102

Population (2018)

Population decreased by 658 over the last 5 years and is projected to decrease by 59 over the next 5 years.

38,168

Total Regional Employment

Jobs decreased by 456 over the last 5 years but are projected to grow by 1,424 over the next 5 years.

\$38.4K

Avg. Earnings Per Job (2018)

Regional average earnings per job are \$28.5K below the national average earnings of \$66.9K per job.

Nine-County Region

253,283

Population (2018)

Population decreased by 3,201 over the last 5 years and is projected to decrease by 739 over the next 5 years.

99,618

Total Regional Employment

Jobs grew by 501 over the last 5 years and are projected to grow by 3,270 over the next 5 years.

\$44.2K

Avg. Earnings Per Job (2018)

Regional average earnings per job are \$22.7K below the national average earnings of \$66.9K per job.

Economy Overview - Cont.

2018 Labor Force Breakdown

City of Houston

Labor Force breakdown data is not available at the ZIP level.

Texas County



Six-County Region



Nine-County Region



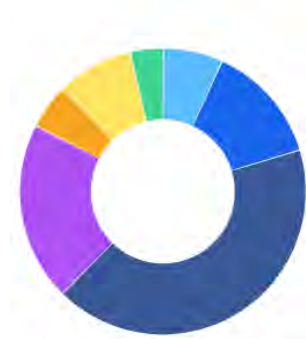
Economy Overview - Educational Attainment

Educational attainment of those 25+ years of age is an indicator of the existing skills of an area's workforce. Because more rural areas typically have fewer jobs requiring higher levels of education and more limited access to education, they often have attainment levels below state and national averages. This is not a reflection of ability to learn new skills. Attainment of an Associate Degree is 8% of the 25+ population in the United States; 7.3% in Missouri. Attainment of a Bachelor Degree is 18.6% in the United State; 17.1% in Missouri.

Houston ZIP

Educational attainment data is not available at the ZIP level.

Texas County



	% of Population	Population
Less Than 9th Grade	6.8%	1,234
9th Grade to 12th Grade	13.5%	2,467
High School Diploma	42.0%	7,682
Some College	20.3%	3,702
Associate's Degree	5.1%	925
Bachelor's Degree	8.7%	1,591
Graduate Degree and Higher	3.7%	680

Six-County Region



	% of Population	Population
Less Than 9th Grade	7.3%	6,184
9th Grade to 12th Grade	11.0%	9,307
High School Diploma	41.8%	35,311
Some College	20.4%	17,262
Associate's Degree	6.8%	5,753
Bachelor's Degree	7.7%	6,505
Graduate Degree and Higher	5.0%	4,214

Nine-County Region



	% of Population	Population
Less Than 9th Grade	6.3%	10,417
9th Grade to 12th Grade	9.7%	16,153
High School Diploma	38.2%	63,384
Some College	21.7%	36,047
Associate's Degree	7.2%	11,934
Bachelor's Degree	10.3%	17,033
Graduate Degree and Higher	6.6%	10,926

Historic & Projected Trends

Population Trends

As of 2018 the Houston ZIP population increased by 0.1% since 2013, growing by 7. Population is expected to increase by 0.1% between 2018 and 2023, adding 6.

As of 2018 the Texas County population increased by 0.5% since 2013, growing by 119. Population is expected to increase by 0.5% between 2018 and 2023, adding 141.

As of 2018 the Houston six-county region's population declined by 0.5% since 2013, falling by 658. Population is expected to decrease by 0.0% between 2018 and 2023, losing 59.

As of 2018 the Houston nine-county region's population declined by 1.2% since 2013, falling by 3,201. Population is expected to decrease by 0.3% between 2018 and 2023, losing 739.

Year	Houston	Texas County	Six-County Region	Nine-County Region
2013	5,337	25,670	121,760	256,483
2014	5,427	25,652	121,477	255,559
2015	5,409	25,662	121,217	254,741
2016	5,412	25,852	121,289	254,146
2017	5,336	25,735	121,198	253,434
2018	5,343	25,789	121,102	253,283
2019	5,345	25,822	121,089	253,117
2020	5,346	25,853	121,074	252,958
2021	5,348	25,881	121,062	252,811
2022	5,349	25,906	121,052	252,674
2023	5,349	25,930	121,043	252,544

Historic & Projected Trends - Cont.

Job Trends

From 2013 to 2018, jobs declined by 2.8% in the Houston ZIP from 2,610 to 2,537. This change fell short of the national growth rate of 8.5% by 11.3%.

From 2013 to 2018, jobs declined by 5.4% in Texas County, MO from 7,041 to 6,664. This change fell short of the national growth rate of 8.5% by 13.9%.

From 2013 to 2018, jobs declined by 1.2% in Houston 6-County from 38,624 to 38,168. This change fell short of the national growth rate of 8.5% by 9.7%.

From 2013 to 2018, jobs increased by 0.5% in Houston 9-County from 99,117 to 99,618. This change fell short of the national growth rate of 8.5% by 8.0%.

Year	Houston	Texas County	Six-County Region	Nine-County Region
2013	2,610	7,041	38,624	99,117
2014	2,499	6,823	38,068	96,929
2015	2,452	6,748	38,058	97,545
2016	2,559	6,801	37,931	97,744
2017	2,602	6,827	37,771	98,865
2018	2,537	6,664	38,168	99,618
2019	2,570	6,685	38,614	100,643
2020	2,596	6,701	38,964	101,448
2021	2,617	6,713	39,248	102,100
2022	2,631	6,719	39,481	102,666
2023	2,640	6,723	39,591	102,888

Population Characteristics

Houston ZIP



Millennials

Houston, MO (in Texas county) (ZIP 65483) has 917 millennials (ages 20-34). The national average for an area this size is 1,105.



Retiring Soon

Retirement risk is high in Houston, MO (in Texas county) (ZIP 65483). The national average for an area this size is 1,521 people 55 or older, while there are 1,896 here.



Racial Diversity

Racial diversity is low in Houston, MO (in Texas county) (ZIP 65483). The national average for an area this size is 2,096 racially diverse people, while there are 341 here.



Veterans



Violent Crime



Property Crime

Population Characteristics - Cont.

Texas County



Millennials

Texas County, MO has 4,429 millennials (ages 20-34). The national average for an area this size is 5,330.



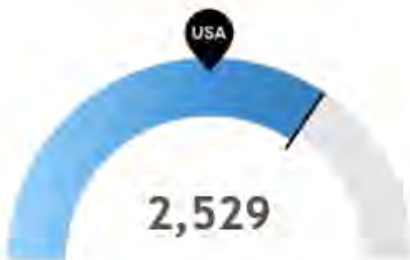
Retiring Soon

Retirement risk is high in Texas County, MO. The national average for an area this size is 7,336 people 55 or older, while there are 9,065 here.



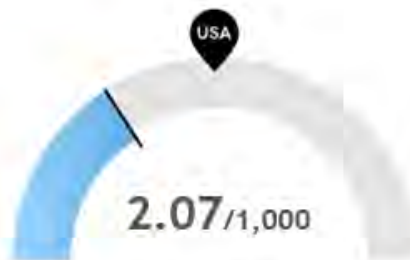
Racial Diversity

Racial diversity is low in Texas County, MO. The national average for an area this size is 10,107 racially diverse people, while there are 2,293 here.



Veterans

Texas County, MO has 2,529 veterans. The national average for an area this size is 1,496.



Violent Crime

Texas County, MO has 2.07 violent crimes per 1,000 people. The national rate is 3.75 per 1,000 people.



Property Crime

Texas County, MO has 15.82 property crimes per 1,000 people. The national rate is 24.21 per 1,000 people.

Population Characteristics - Cont.

Six-County Region



Your area has 19,943 millennials (ages 20-34). The national average for an area this size is 25,102.



Retirement risk is high in your area. The national average for an area this size is 34,550 people 55 or older, while there are 42,639 here.



Racial diversity is low in your area. The national average for an area this size is 47,597 racially diverse people, while there are 7,560 here.



Your area has 10,609 veterans. The national average for an area this size is 7,047.



Your area has 2.05 violent crimes per 1,000 people. The national rate is 3.75 per 1,000 people.



Your area has 17.56 property crimes per 1,000 people. The national rate is 24.21 per 1,000 people.

Population Characteristics - Cont.

Nine-County Region



Your area has 19,943 millennials (ages 20-34). The national average for an area this size is 25,102.



Retirement risk is high in your area. The national average for an area this size is 34,550 people 55 or older, while there are 42,639 here.



Racial diversity is low in your area. The national average for an area this size is 47,597 racially diverse people, while there are 7,560 here.



Your area has 10,609 veterans. The national average for an area this size is 7,047.



Your area has 2.05 violent crimes per 1,000 people. The national rate is 3.75 per 1,000 people.

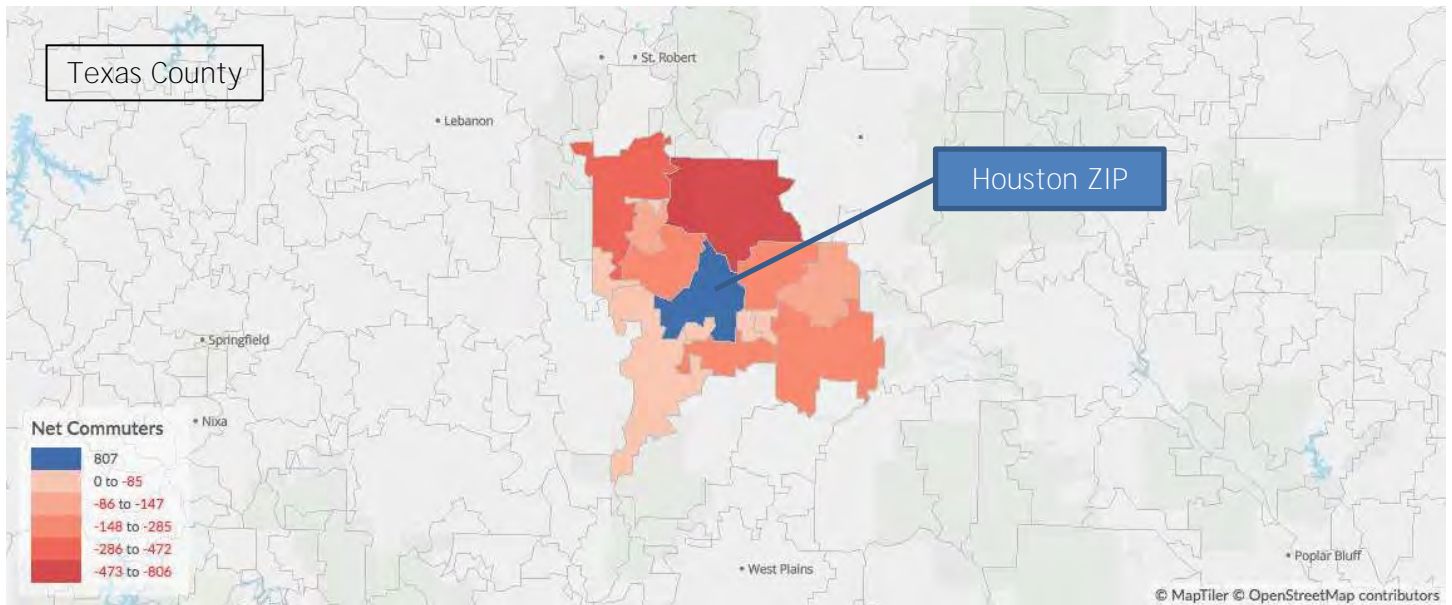


Your area has 17.56 property crimes per 1,000 people. The national rate is 24.21 per 1,000 people.

Population Characteristics - Cont.

Place of Work vs Place of Residence

Understanding where talent in Houston, MO (in Texas county) currently works compared to where talent lives can help companies target areas for new talent attraction. The Houston ZIP area is a labor “importer”, with 2,537 jobs (2018) compared to 1,730 residents working. Houston draws in more than 800 people. The north end of Texas County is the largest “exporter” of talent in the county.

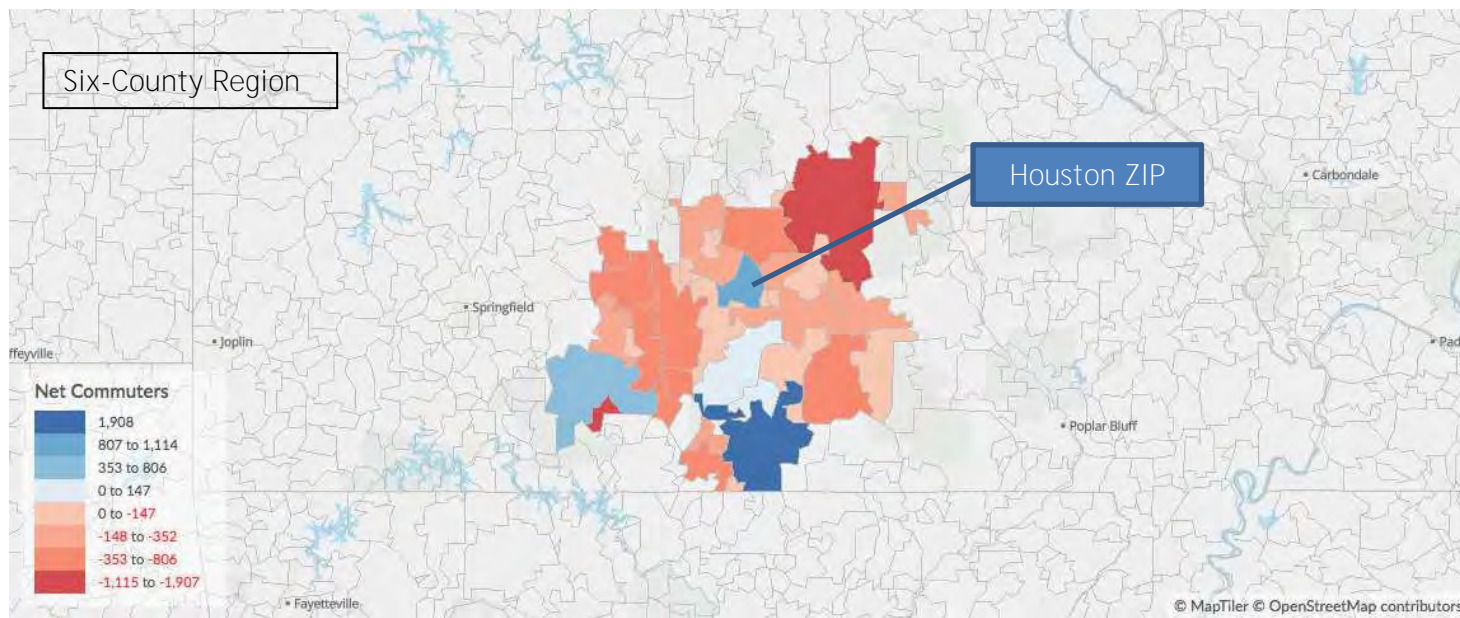


ZIP	Name	Employment	ZIP	Name	Workers
65483	Houston, MO	2,537	65483	Houston, MO	1,730
65689	Cabool, MO	1,605	65542	Licking, MO	1,647
65542	Licking, MO	1,173	65689	Cabool, MO	1,635
65571	Summersville, MO	537	65571	Summersville, MO	723
65552	Plato, MO	345	65552	Plato, MO	631

Population Characteristics - Cont.

Place of Work vs Place of Residence

In the six-county area, Houston is in the top five zip code areas for employment. West Plains has a significant employment base, but also significant population in the region. Along with West Plains and Houston, Mountain Grove and Ava have more jobs than residents who are working and are net “importers” of labor.

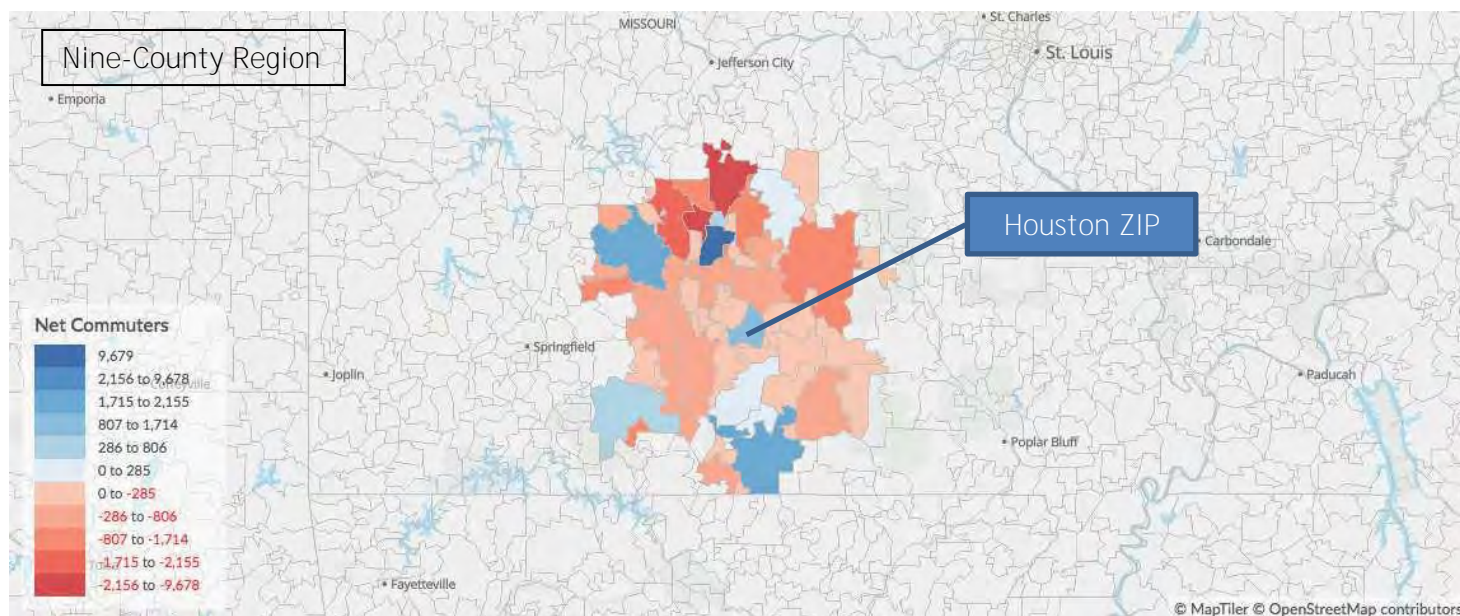


ZIP	Name	Employment	ZIP	Name	Workers
65775	West Plains, MO	11,582	65775	West Plains, MO	9,674
65560	Salem, MO	4,275	65560	Salem, MO	5,390
65608	Ava, MO	2,872	65711	Mountain Grove, MO	3,306
65711	Mountain Grove, MO	2,770	65548	Mountain View, MO	2,385
65483	Houston, MO	2,537	65608	Ava, MO	2,307

Population Characteristics - Cont.

Place of Work vs Place of Residence

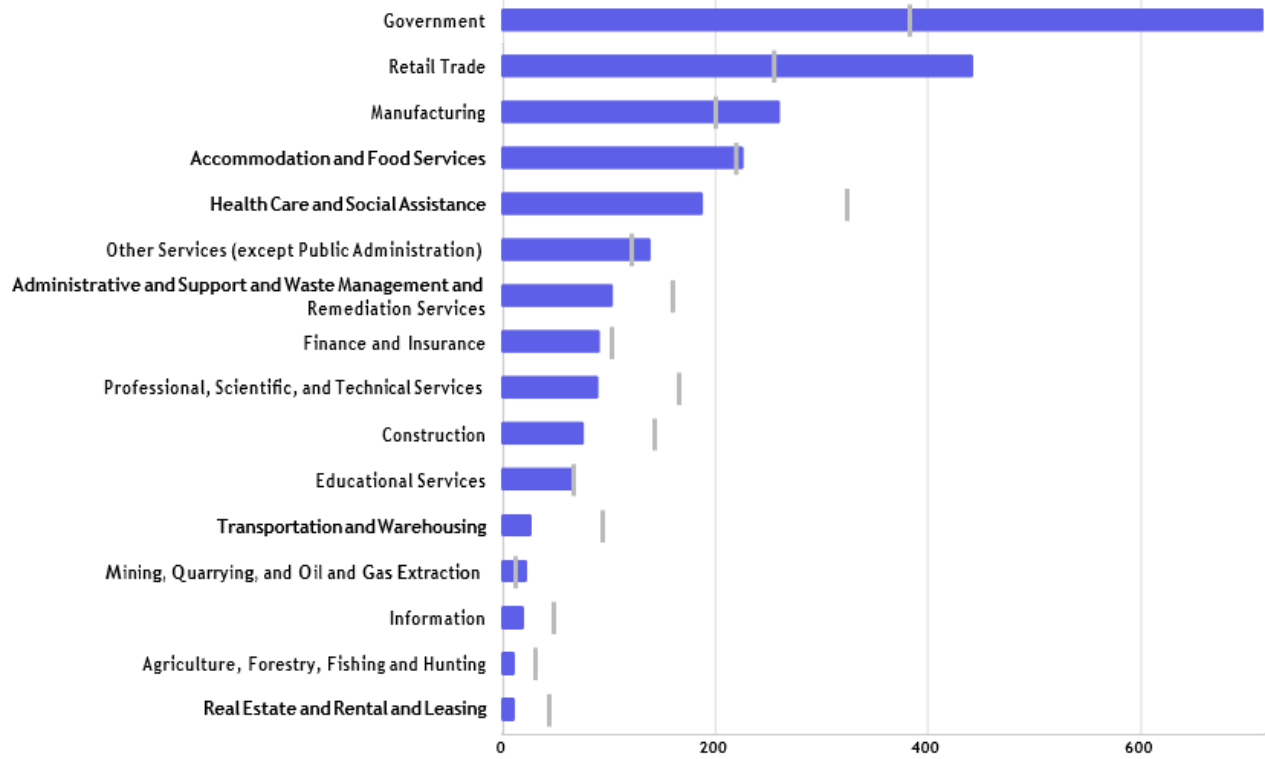
In the broader nine-county region the three counties along Interstate 44 have the largest employment and larger workforce base. The cities of Lebanon, Rolla, Waynesville and St. Roberts (the last two serving Ft. Leonard Wood) have large employment bases compared to Houston. However, this region zip map clearly shows that Houston is an island of jobs surrounded by zip code areas where many people commute to find employment. This may create a target area for Houston employers to consider to expand the workforce.



ZIP	Name	Employment	ZIP	Name	Workers
65536	Lebanon, MO	14,603	65401	Rolla, MO	13,312
65401	Rolla, MO	13,567	65536	Lebanon, MO	12,888
65473	Fort Leonard Wood, MO...	11,930	65775	West Plains, MO	9,674
65775	West Plains, MO	11,582	65583	Waynesville, MO	6,905
65584	Saint Robert, MO	5,429	65560	Salem, MO	5,390

Industry Characteristics-Largest Industries Houston ZIP

● Industry Jobs ● National Average

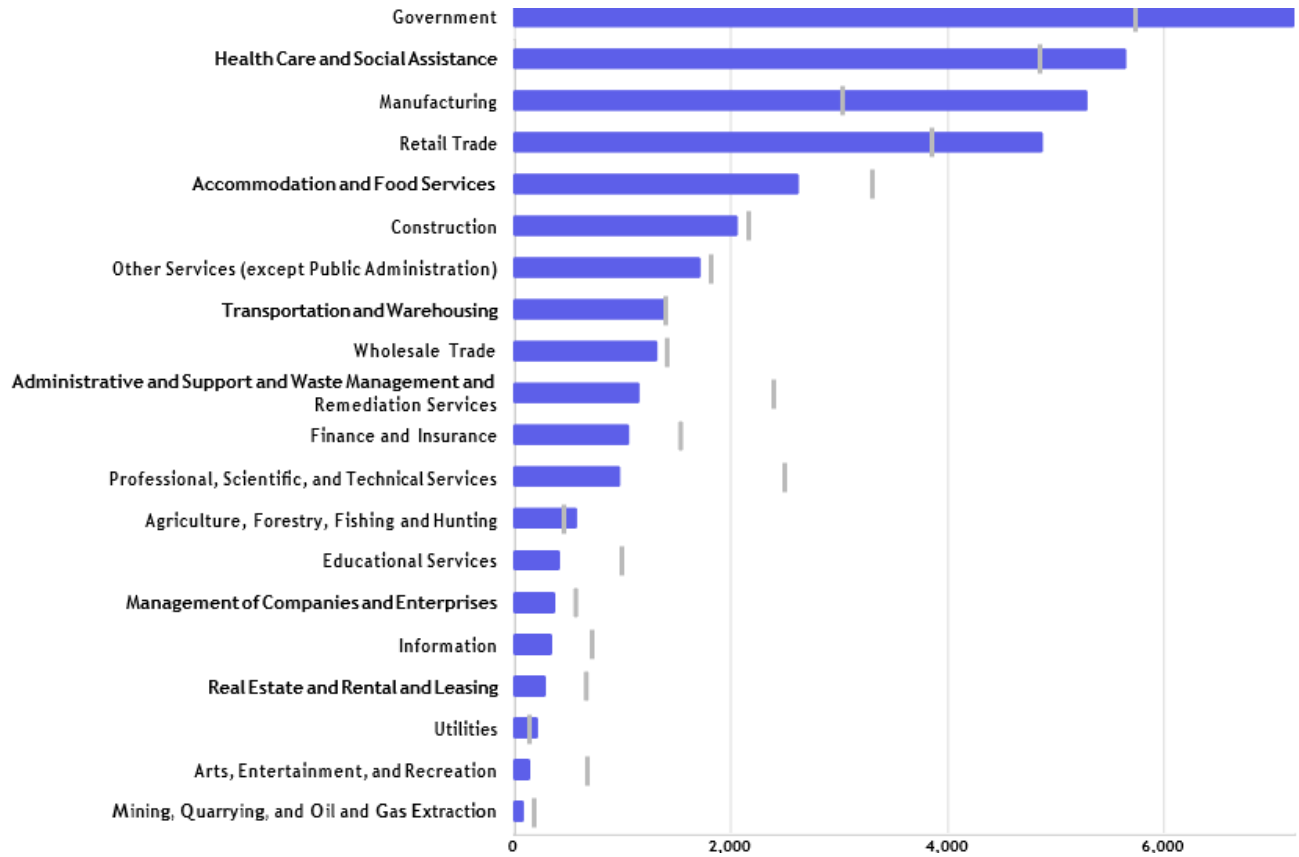


Texas County

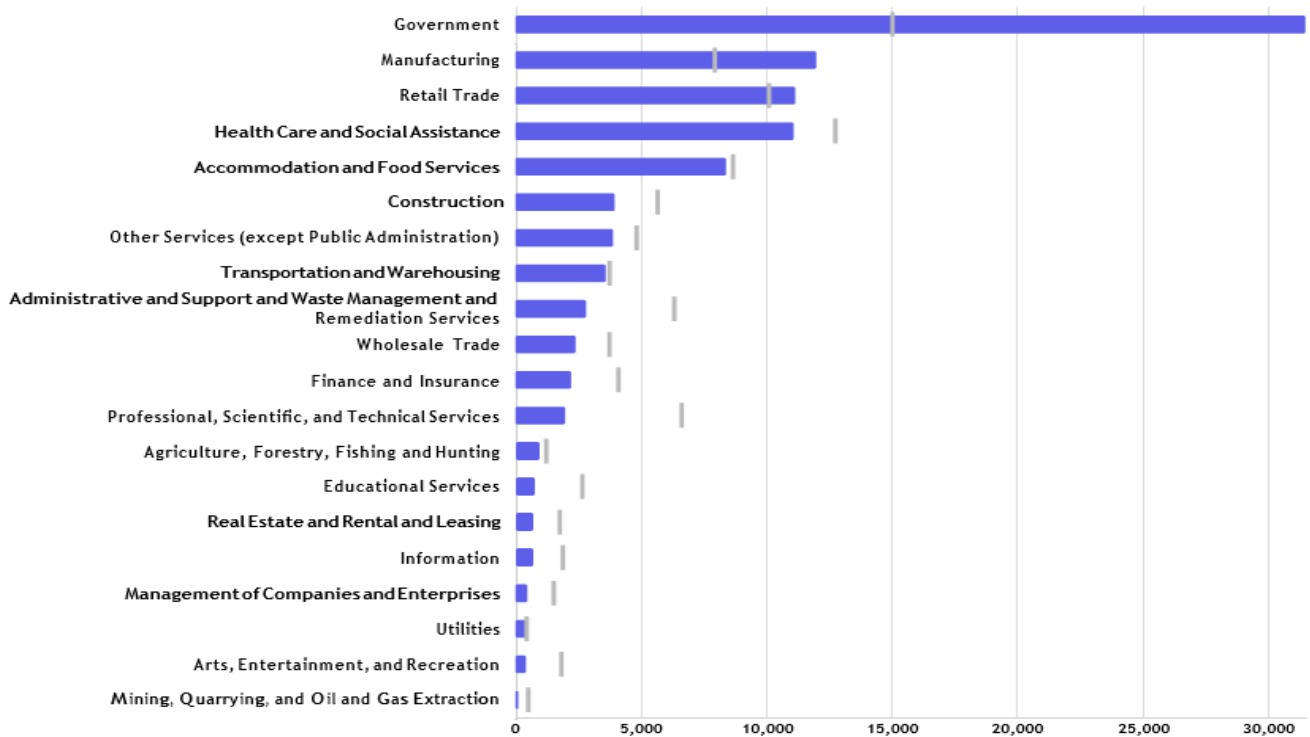


Industry Characteristics-Largest Industries Six-County Region

● Industry Jobs ● National Average

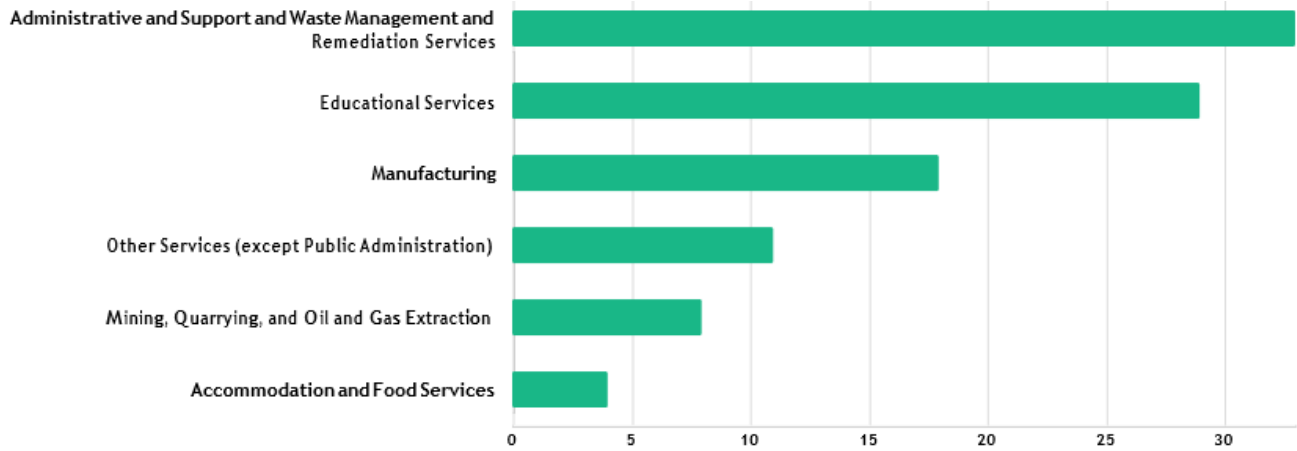


Nine-County Region

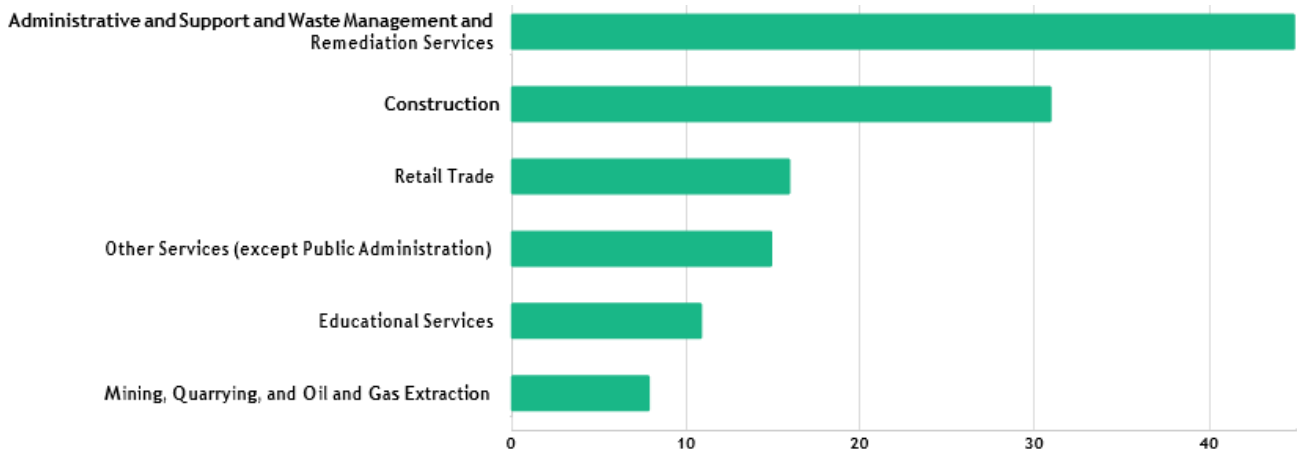


Industry Characteristics - Top Growing Industries Houston ZIP

● Industry Jobs Growth



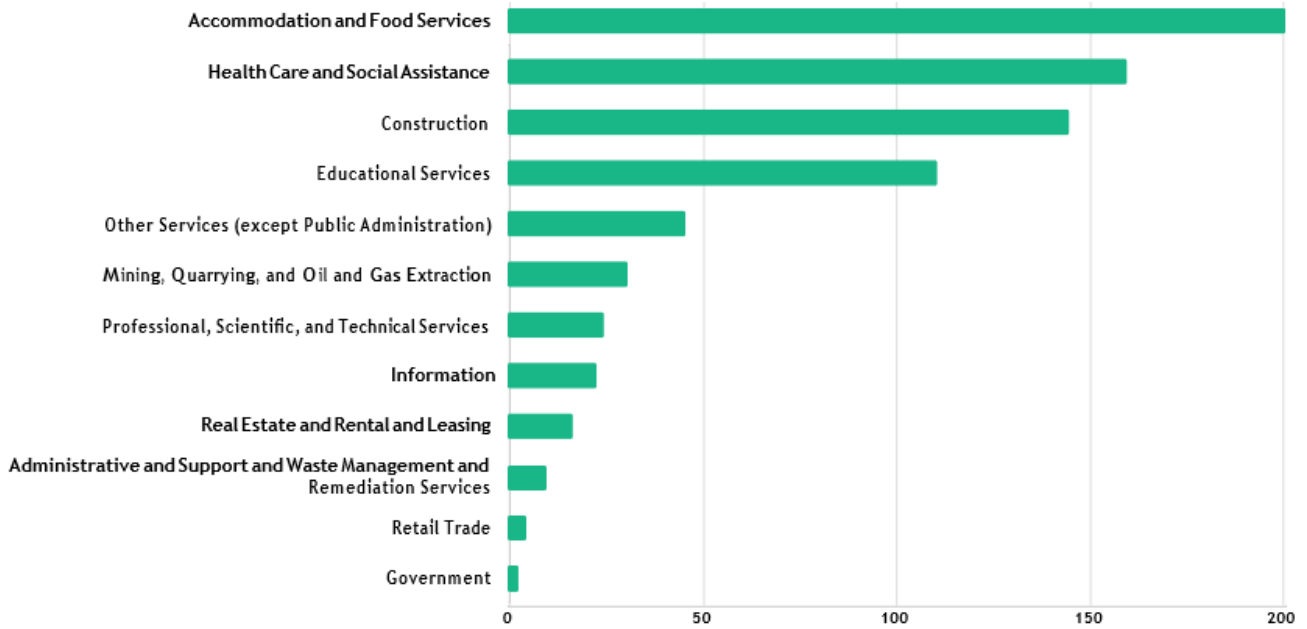
Texas County



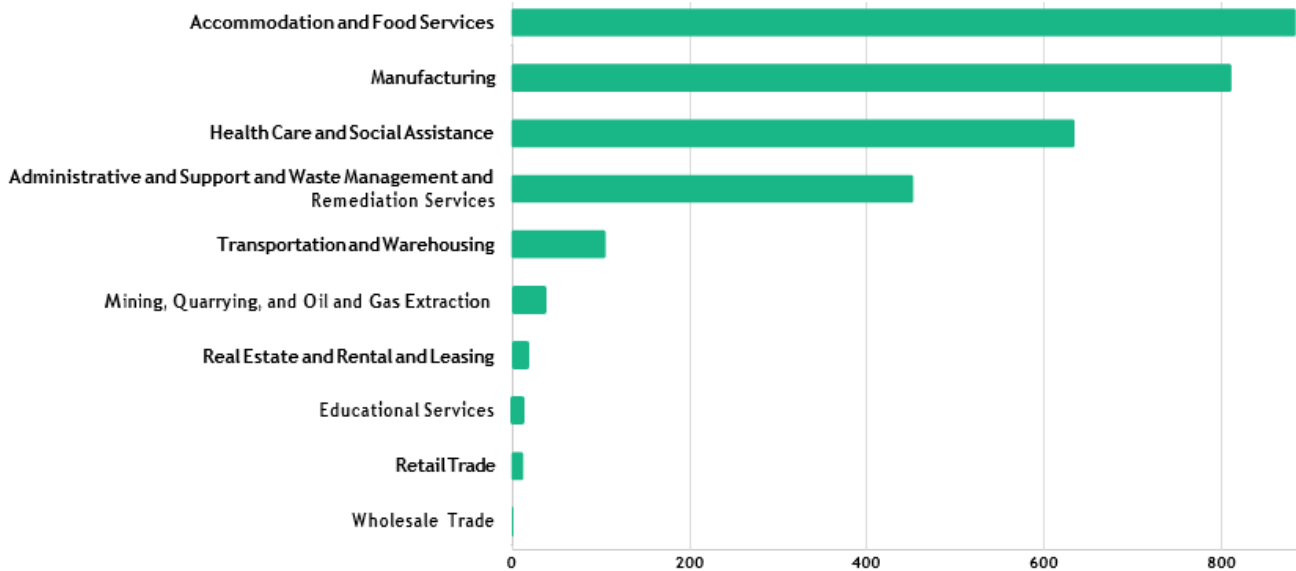
Industry Characteristics - Top Growing Industries

● Industry Jobs Growth

Six-County Region



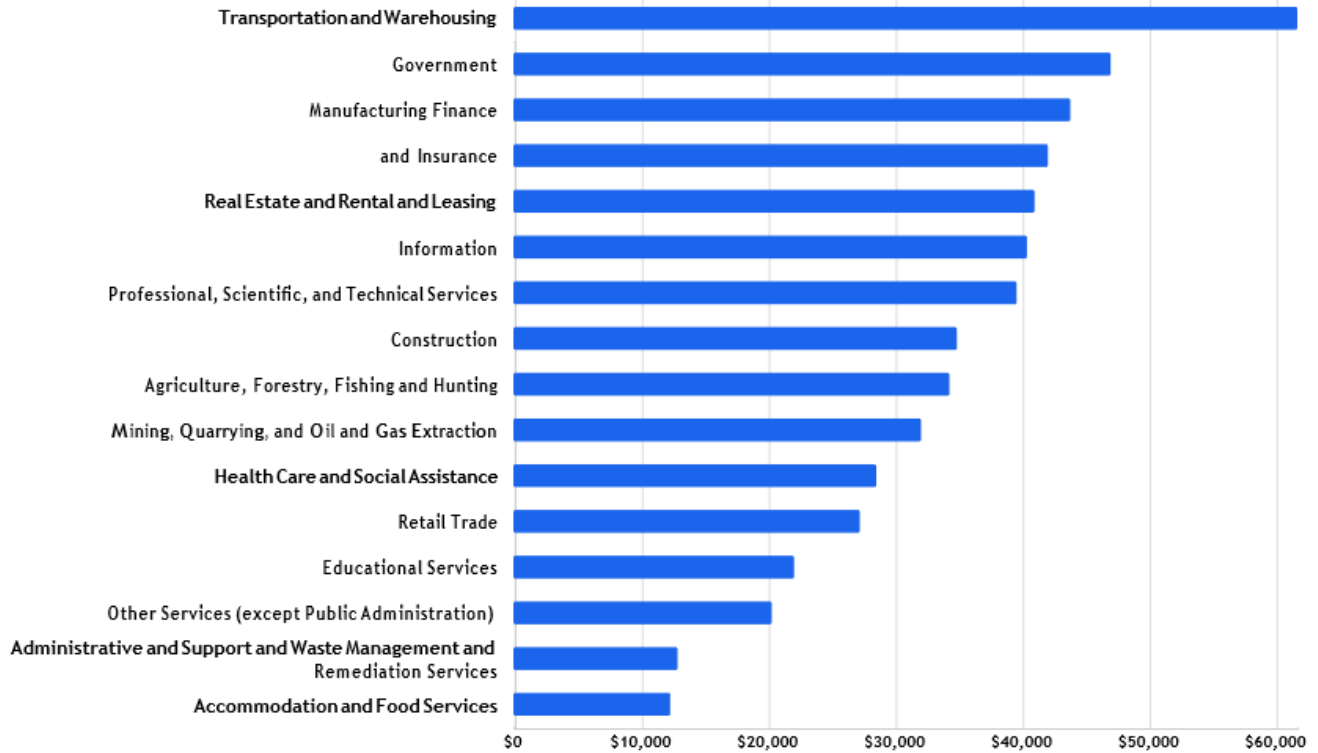
Nine-County Region



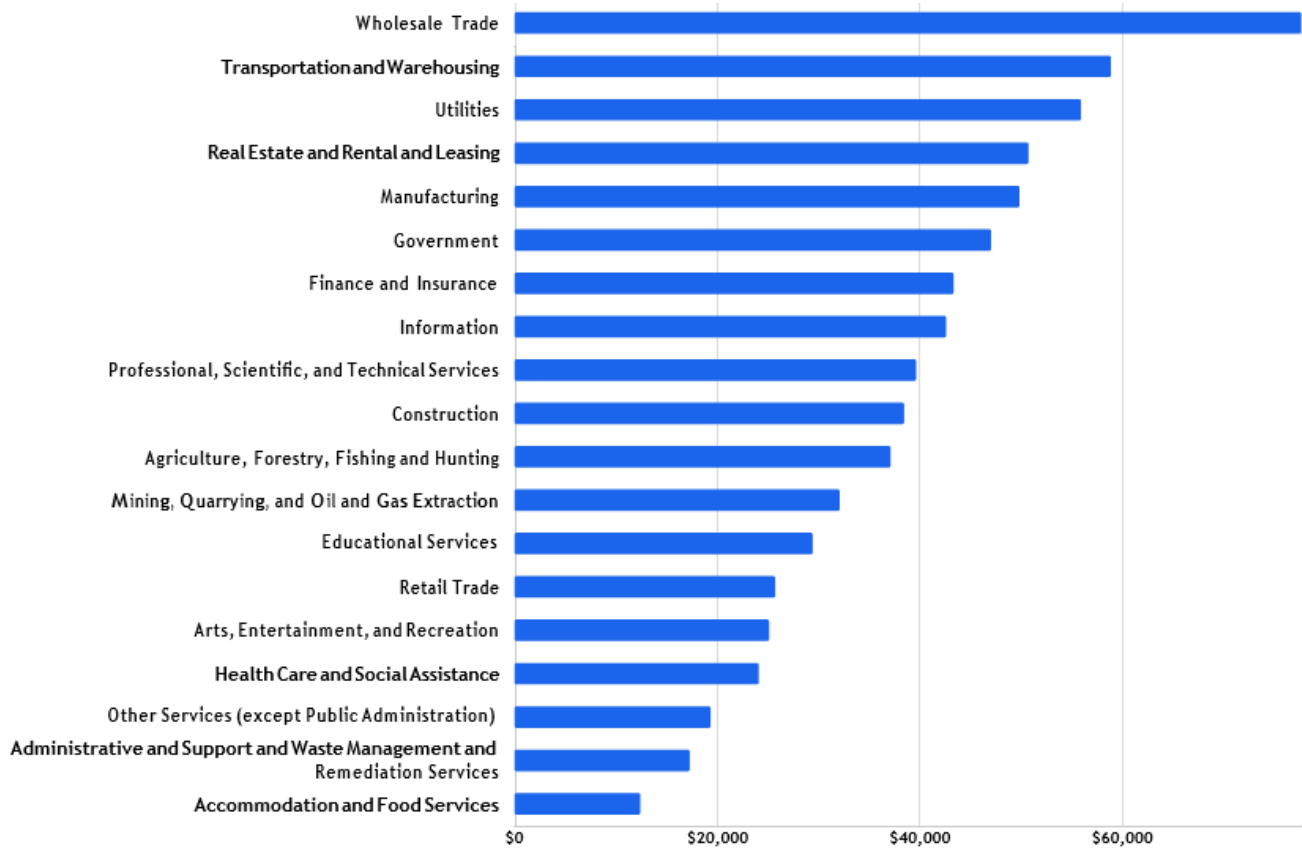
Industry Characteristics - Top Industry Earnings

Houston

● 2018 Earnings Per Worker



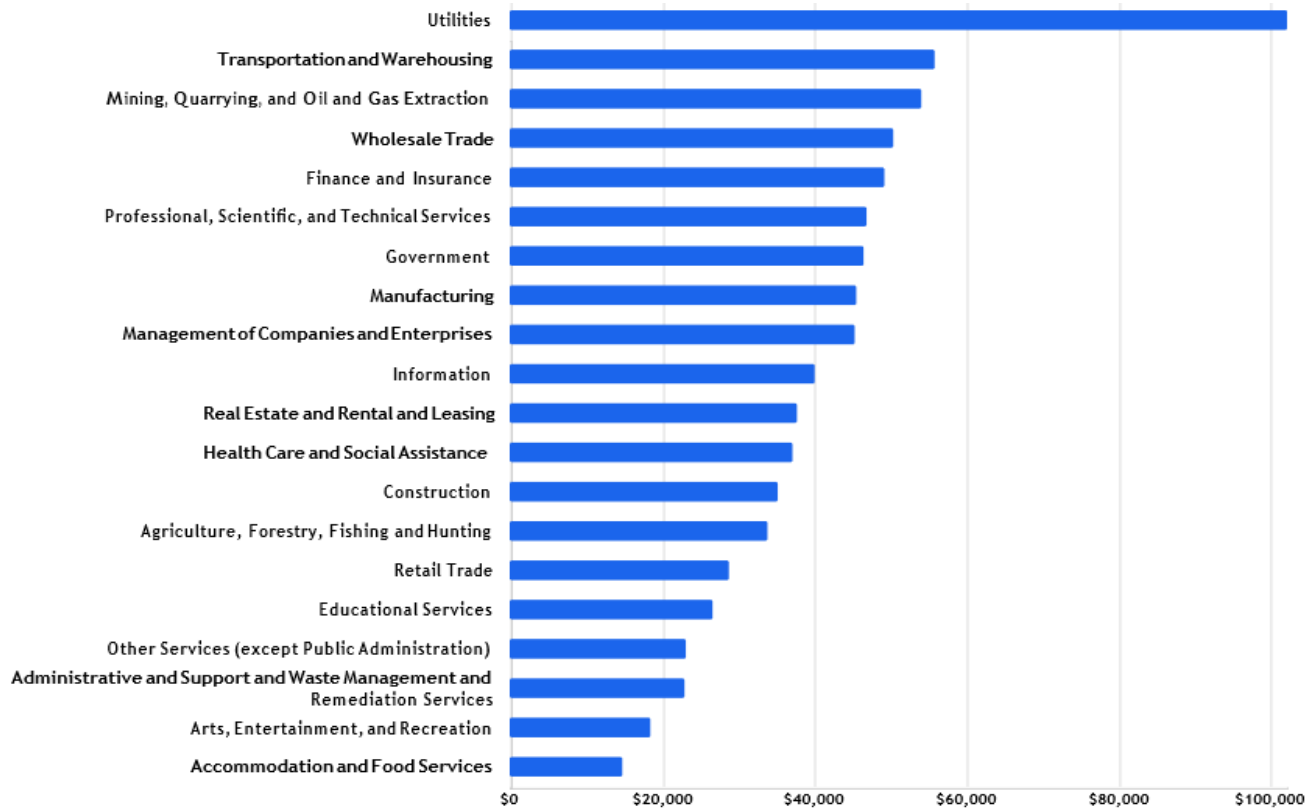
Texas County



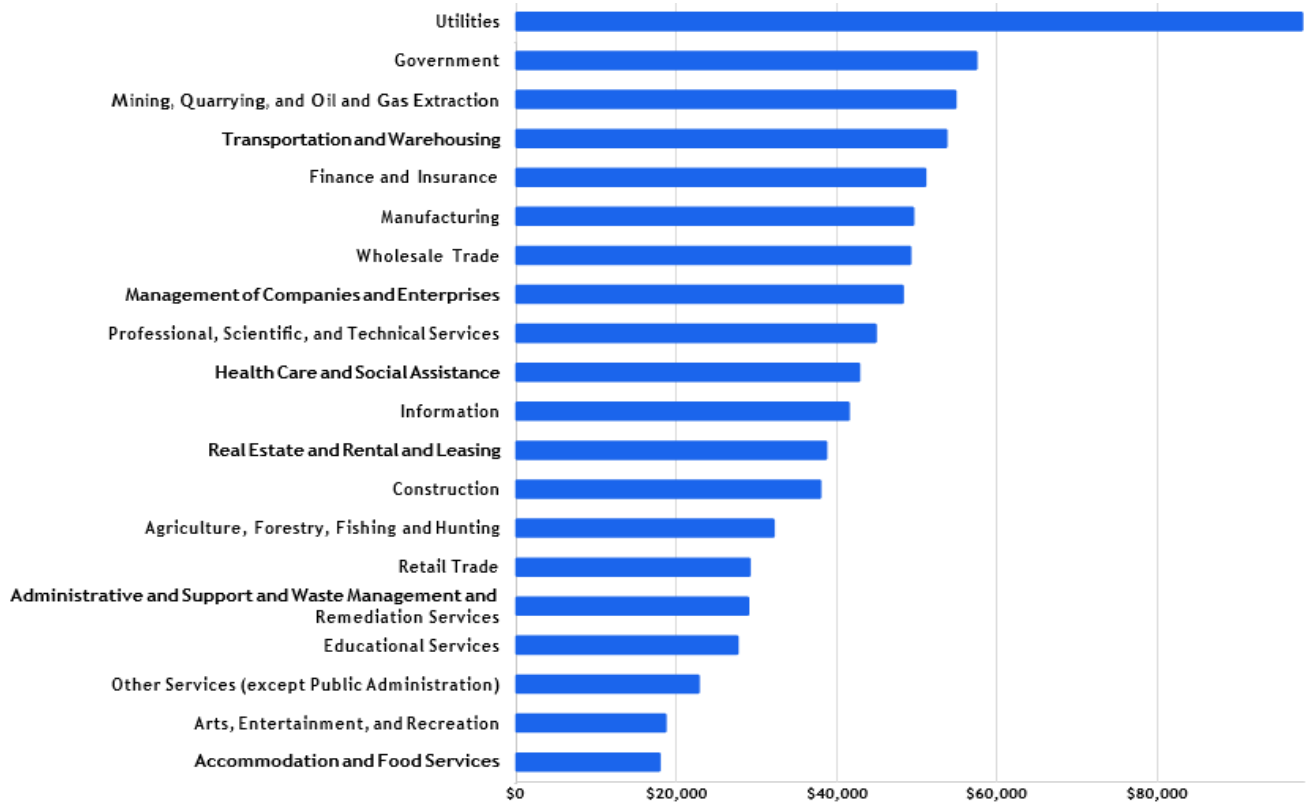
Industry Characteristics - Top Industry Earnings

● 2018 Earnings Per Worker

Six-County Region



Nine-County Region



Industry Characteristics-Overview

Houston

Industry Sector	2013 Jobs	2018 Jobs	Change in Jobs	% Change in Jobs	2018 LQ	2018 Earnings Per Worker	2018 GRP
Government	735	718	-17	-2%	1.88	\$47,113	\$37.14M
Retail Trade	448	444	-4	-1%	1.74	\$27,329	\$21.91M
Manufacturing	244	262	18	+7%	1.31	\$43,957	\$16.45M
Accommodation and Food Services	224	228	4	+2%	1.04	\$12,339	\$4.94M
Health Care and Social Assistance	244	190	-54	-22%	0.59	\$28,622	\$7.09M
Other Services	130	141	11	+8%	1.17	\$20,399	\$5.50M
Administrative and Support and Waste Management	73	106	33	+45%	0.67	\$13,008	\$2.59M
Finance and Insurance	101	92	-9	-9%	0.91	\$42,157	\$19.33M
Professional, Scientific and Technical	107	92	-15	-14%	0.56	\$39,716	\$6.08M
Construction	88	78	-10	-11%	0.55	\$34,997	\$4.42M
Educational Services	41	70	29	+71%	1.08	\$22,088	\$2.03M
Transportation and Warehousing	74	29	-45	-61%	0.31	\$51,807	\$2.87M
Mining, Quarrying, and Oil and Gas	16	24	8	+50%	2.27	\$32,163	\$2.72M
Information	29	21	-8	-28%	0.46	\$46,557	\$3.11M
Agriculture, Forestry, Fishing and	27	14	-13	-48%	0.48	\$34,411	\$5.91M
Real Estate and Rental and Leasing	15	13	-2	-13%	0.31	\$41,113	\$3.00M

Industry Characteristics-Overview

Texas County

Industry Sector	2013 Jobs	2018 Jobs	Change in Jobs	% Change in Jobs	2018 LO	2018 Earnings Per Worker	2018 GRP
Government	2,054	2,016	-38	-2%	2.01	\$47,163	\$109.82M
Retail Trade	826	842	16	+2%	1.26	\$25,724	\$40.51M
Manufacturing	907	817	-90	-10%	1.55	\$49,982	\$96.05M
Health Care and Social Assistance	615	537	-78	-13%	0.63	\$24,098	\$15.64M
Construction	415	446	31	+7%	1.19	\$38,547	\$26.85M
Accommodation and Food Services	395	395	0	0%	0.69	\$12,381	\$8.43M
Transportation and Warehousing	483	352	-131	-27%	1.45	\$58,933	\$30.62M
Other Services	280	295	15	+5%	0.94	\$19,408	\$10.21M
Administrative and Support and Waste Mangement	140	185	45	+32%	0.44	\$17,335	\$5.17M
Finance and Insurance	214	185	-29	-14%	0.69	\$43,432	\$35.41M
Professional, Scientific and Technical	148	141	-7	-5%	0.32	\$39,703	\$10.04M
Agriculture, Forestry, Fishing and	178	100	-78	-44%	1.28	\$37,194	\$42.93M
Educational Services	79	90	11	+14%	0.53	\$29,508	\$3.56M
Utilities	93	78	-15	-16%	3.40	\$56,040	\$15.69M
Wholesale Trade	77	70	-7	-9%	0.29	\$77,799	\$9.56M
Information	52	40	-12	-23%	0.33	\$42,693	\$6.21M
Real Estate and Rental and Leasing	39	35	-4	-10%	0.31	\$50,786	\$8.53M
Mining, Quarrying, and Oil and Gas	16	24	8	+50%	0.86	\$32,163	\$2.72M
Arts, Entertainment, and Recreation	19	11	-8	-42%	0.10	\$25,190	\$705.69K

Industry Characteristics-Overview

Six-County Region

Industry Sector	2013 Jobs	2018 Jobs	Change in Jobs	% Change in Jobs	2018 LQ	2018 Earnings Per Worker	2018 GRP
Government	7,222	7,225	3	+0%	1.26	\$46,645	\$383.21M
Health Care and Social Assistance	5,512	5,672	160	+3%	1.17	\$37,215	\$250.50M
Manufacturing	6,022	5,306	-716	-12%	1.76	\$45,623	\$518.69M
Retail Trade	4,898	4,903	5	+0%	1.28	\$28,749	\$254.93M
Accommodation and Food Services	2,439	2,640	201	+8%	0.80	\$14,849	\$67.15M
Construction	1,931	2,076	145	+8%	0.97	\$35,252	\$119.97M
Other Services	1,689	1,735	46	+3%	0.96	\$23,186	\$68.25M
Transportation and Warehousing	1,545	1,410	-135	-9%	1.01	\$55,994	\$128.10M
Wholesale Trade	1,422	1,341	-81	-6%	0.96	\$50,468	\$170.77M
Administrative and Support and Waste Management	1,160	1,170	10	+1%	0.49	\$22,986	\$47.43M
Finance and Insurance	1,098	1,079	-19	-2%	0.70	\$49,267	\$189.29M
Professional, Scientific and Technical	971	996	25	+3%	0.40	\$46,994	\$75.60M
Agriculture, Forestry, Fishing	799	596	-203	-25%	1.34	\$33,849	\$211.60M
Educational Services	336	447	111	+33%	0.46	\$26,731	\$15.79M
Management of Companies	401	400	-1	0%	0.73	\$45,359	\$19.95M
Information	334	357	23	+7%	0.51	\$40,223	\$50.94M
Real Estate and Rental and Leasing	286	303	17	+6%	0.47	\$37,862	\$54.85M
Utilities	292	235	-57	-20%	1.80	\$102,268	\$85.52M
Arts, Entertainment, and Recreation	190	170	-20	-11%	0.26	\$18,427	\$7.65M
Mining, Quarrying, and Oil and Gas	76	107	31	+41%	0.67	\$54,092	\$21.98M

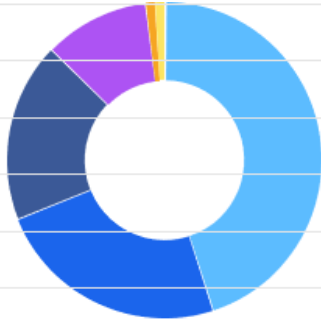
Industry Characteristics-Overview

Nine-County Region

Industry Sector	2013 Jobs	2018 Jobs	Change in Jobs	% Change in Jobs	2018 LQ	2018 Earnings Per Worker	2018 GRP
Government	33,454	31,506	-1,947	-6%	2.11	\$57,743	\$3.06B
Manufacturing	11,175	11,987	812	+7%	1.52	\$49,742	\$1.12B
Retail Trade	11,126	11,139	13	+0%	1.11	\$29,371	\$576.18M
Health Care and Social Assistance	10,440	11,076	636	+6%	0.88	\$43,093	\$555.70M
Accommodation and Food Services	7,515	8,400	885	+12%	0.98	\$18,256	\$233.43M
Construction	4,003	3,988	-15	0%	0.71	\$38,295	\$239.37M
Other Services (except Public	3,927	3,890	-37	-1%	0.83	\$22,958	\$144.53M
Transportation and Warehousing	3,514	3,621	107	+3%	1.00	\$53,869	\$284.75M
Administrative and Support and Waste Management	2,390	2,843	453	+19%	0.46	\$29,286	\$136.28M
Wholesale Trade	2,370	2,371	1	+0%	0.65	\$49,389	\$316.43M
Finance and Insurance	2,331	2,193	-138	-6%	0.55	\$51,275	\$358.54M
Professional, Scientific , and Technical	2,018	1,996	-22	-1%	0.31	\$45,198	\$148.19M
Agriculture, Forestry, Fishing	1,179	982	-197	-17%	0.85	\$32,472	\$278.17M
Educational Services	738	754	16	+2%	0.30	\$27,995	\$28.31M
Real Estate and Rental and Leasing	723	743	20	+3%	0.44	\$39,034	\$116.35M
Information	738	691	-47	-6%	0.38	\$41,722	\$102.27M
Management of Companies and	481	473	-8	-2%	0.33	\$48,536	\$25.28M
Utilities	455	412	-43	-9%	1.21	\$98,341	\$142.83M
Arts, Entertainment, and Recreation	431	404	-27	-6%	0.23	\$18,895	\$17.38M
Mining, Quarrying, and Oil and Gas	110	149	39	+35%	0.36	\$55,058	\$30.73M

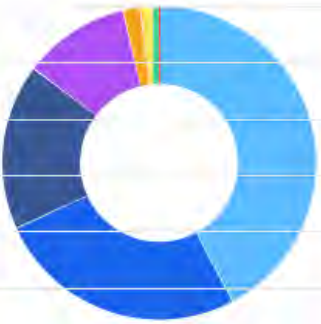
Business Characteristics

Houston ZIP



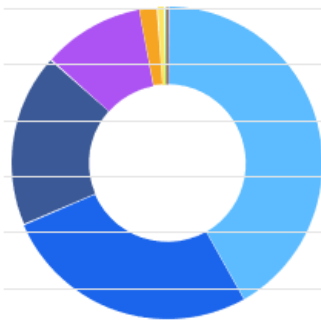
A	1 to 4 employees	45.0%	130
A	5 to 9 employees	23.9%	69
A	10 to 19 employees	18.3%	53
A	20 to 49 employees	10.7%	31
A	50 to 99 employees	1.0%	3
A	250 to 499 employees	1.0%	3

Texas County



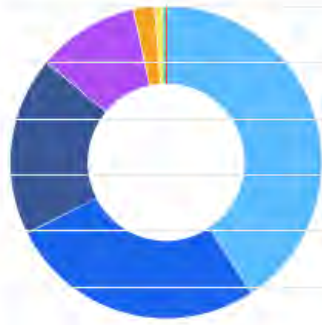
A	1 to 4 employees	42.2%	333
A	5 to 9 employees	25.9%	205
A	10 to 19 employees	17.1%	135
A	20 to 49 employees	11.0%	87
A	50 to 99 employees	1.8%	14
A	100 to 249 employees	1.3%	10
A	250 to 499 employees	0.6%	5
A	500+ employees	0.1%	1

Six-County Region



A	1 to 4 employees	41.7%	1,866
A	5 to 9 employees	26.7%	1,194
A	10 to 19 employees	18.0%	805
A	20 to 49 employees	10.6%	473
A	50 to 99 employees	1.8%	81
A	100 to 249 employees	0.8%	35
A	250 to 499 employees	0.2%	11
A	500+ employees	0.1%	5

Nine-County Region

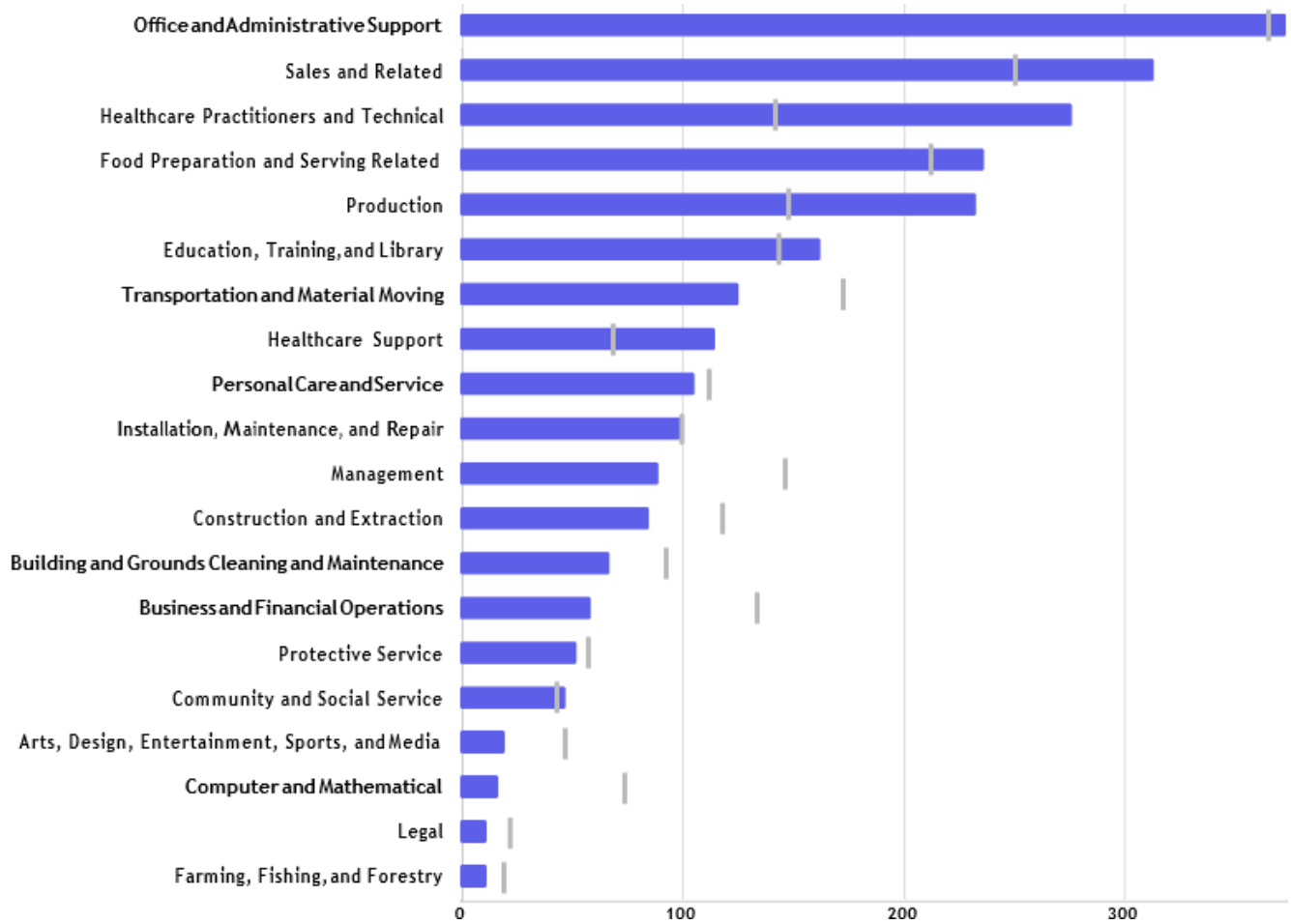


A	1 to 4 employees	40.7%	3,831
A	5 to 9 employees	26.8%	2,520
A	10 to 19 employees	18.6%	1,748
A	20 to 49 employees	10.6%	994
A	50 to 99 employees	2.2%	207
A	100 to 249 employees	0.8%	78
A	250 to 499 employees	0.3%	31
A	500+ employees	0.1%	9

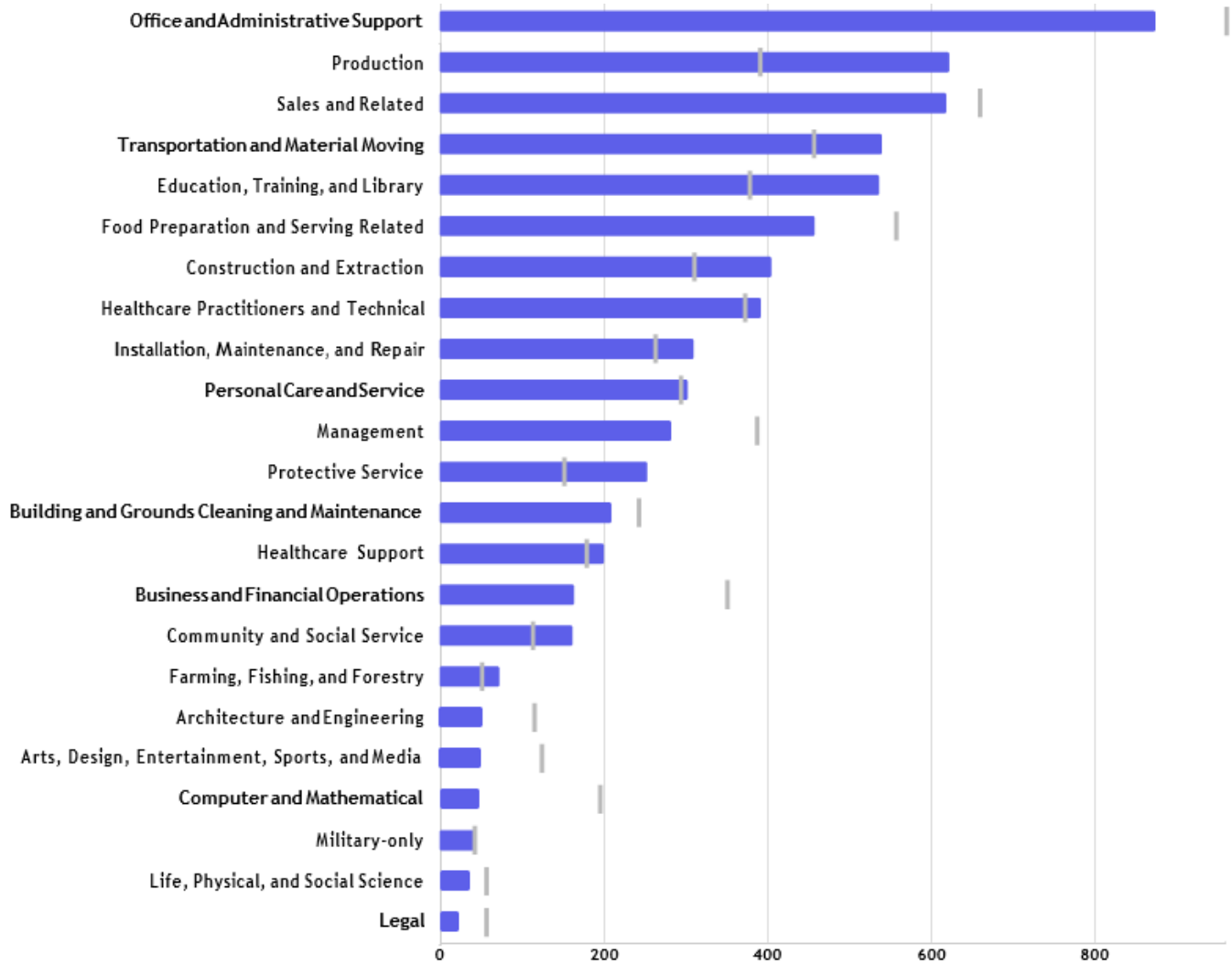
**Business Data by DatabaseUSA.com is third-party data provided by Emsi to its customers as a convenience, and Emsi does not endorse or warrant its accuracy or consistency with other published Emsi data. In most cases, the Business Count will not match total companies with profiles on the summary tab.*

Workforce Characteristics - Occupations Houston ZIP

● Occupation Jobs ● National Average



Texas County



Six-County Region

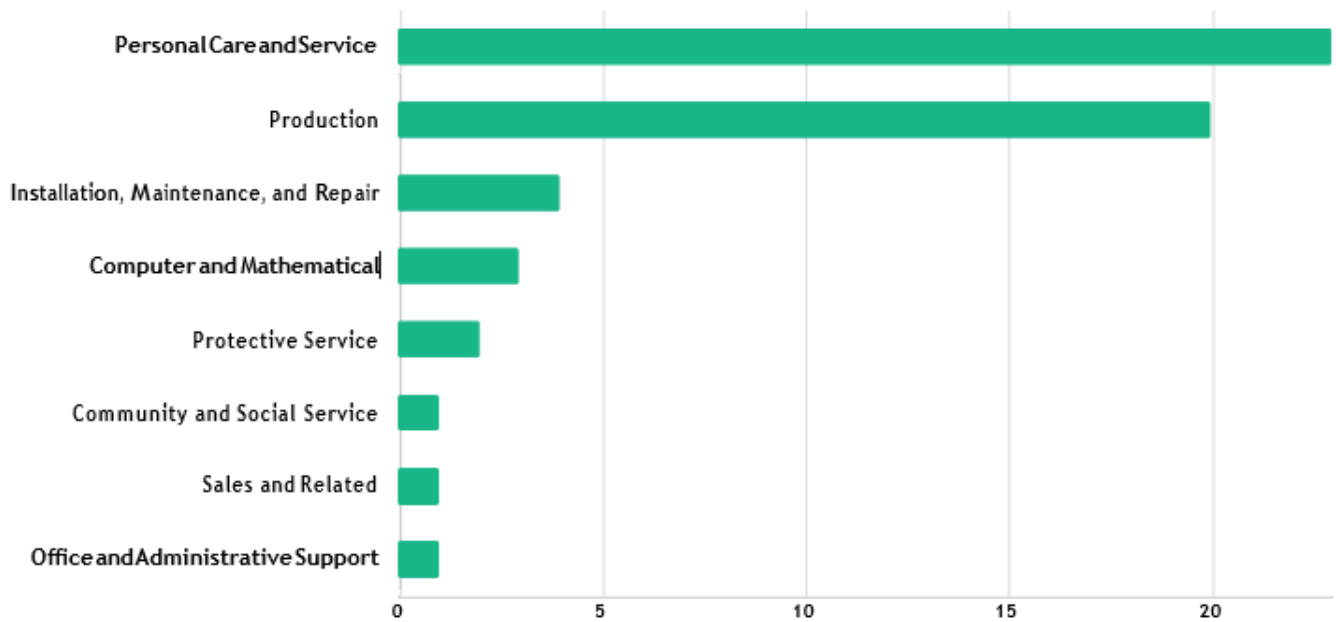


Nine-County Region

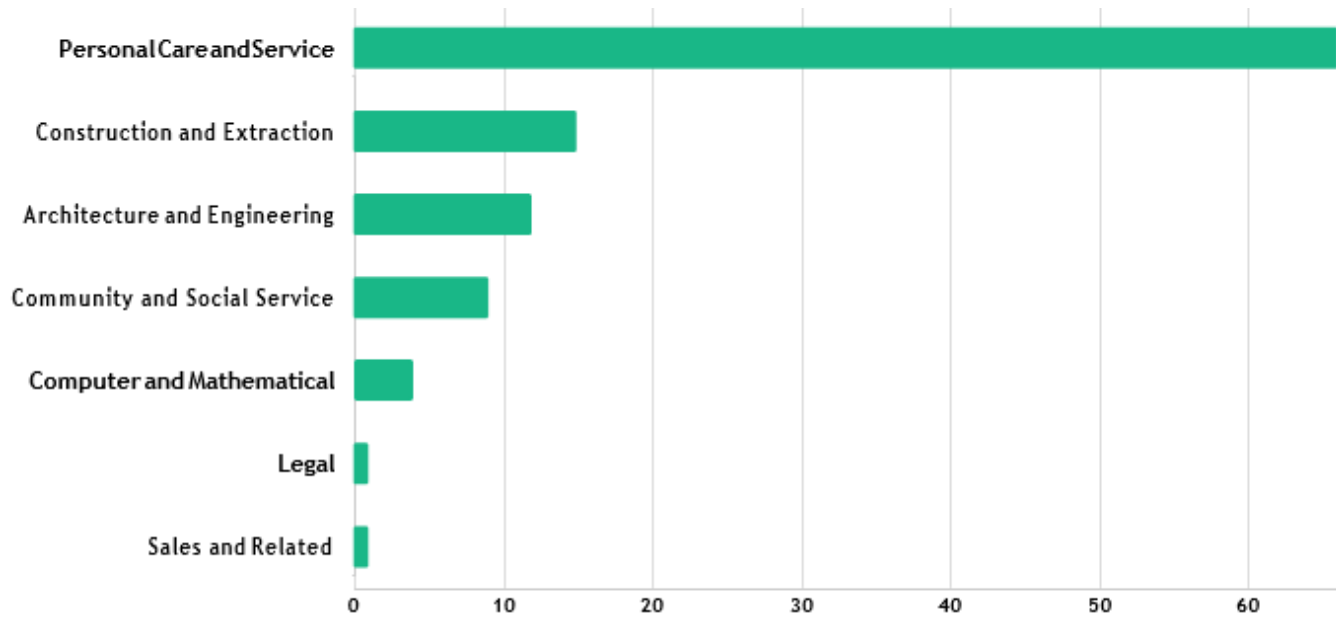


Workforce Characteristics - Growing Occupations Houston ZIP

● Occupation Jobs Growth



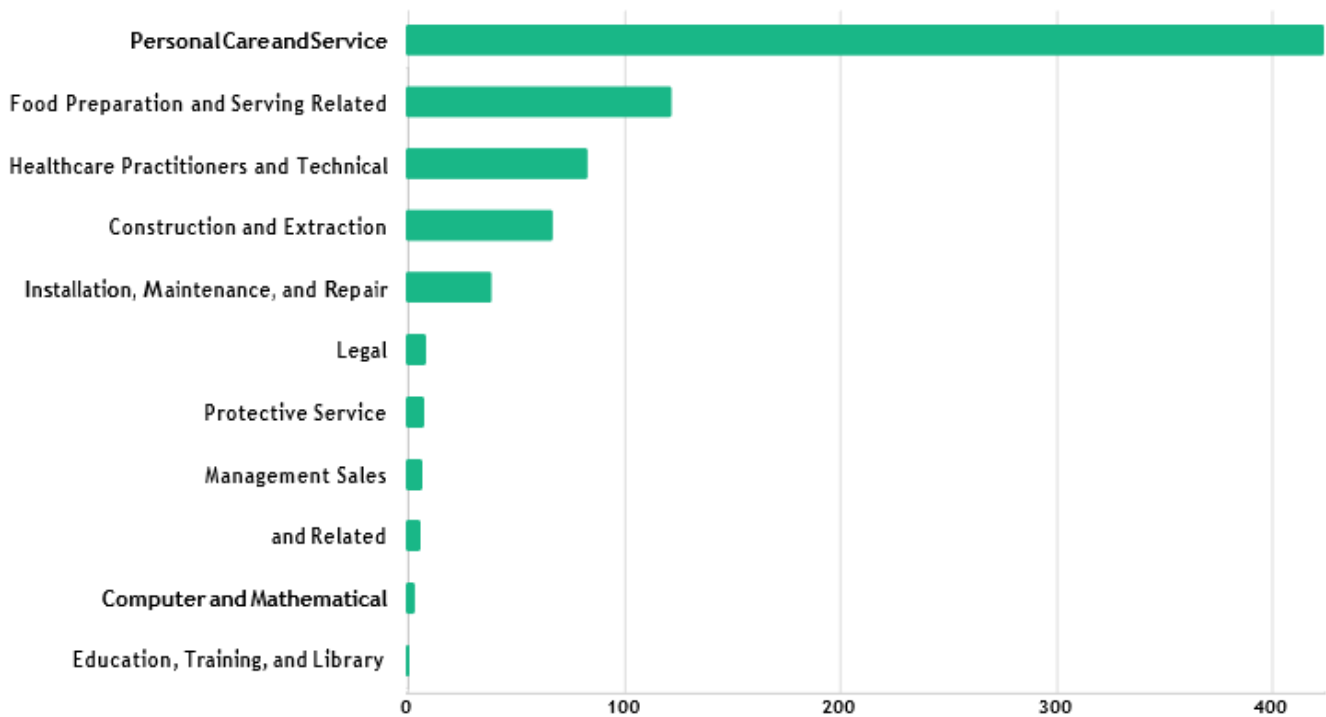
Texas County



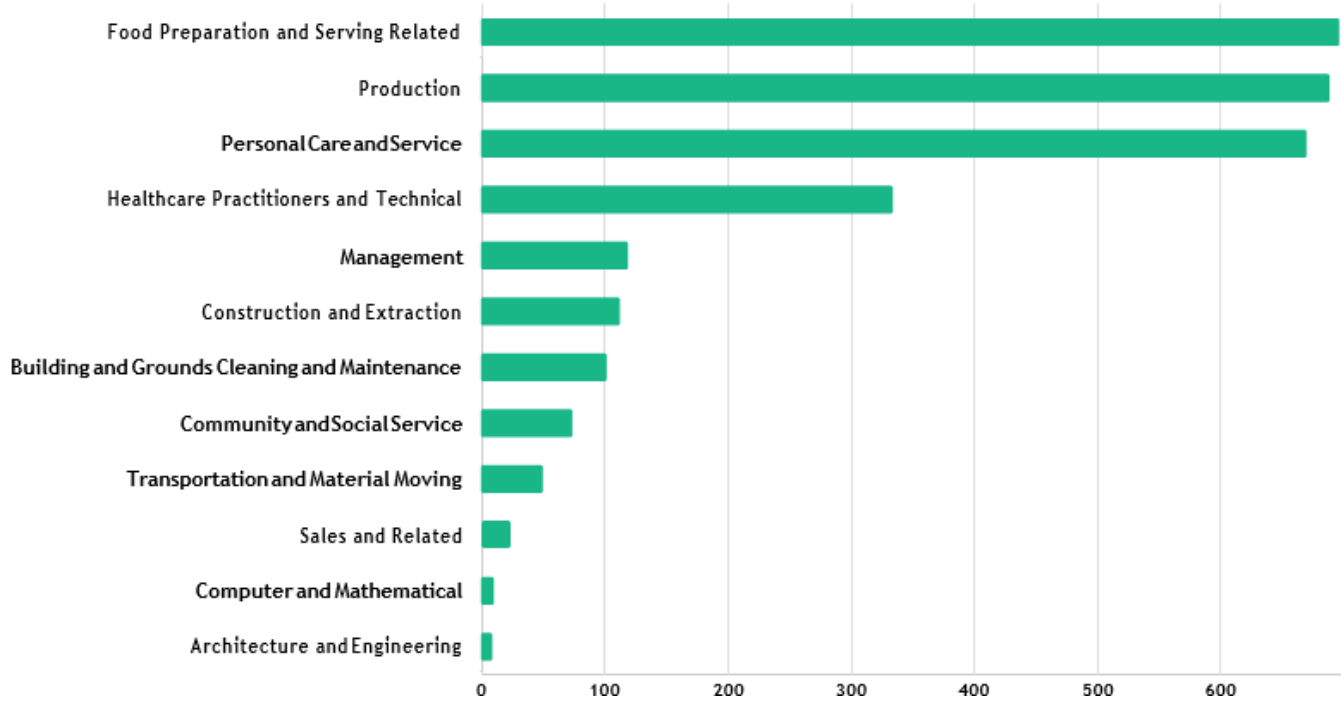
Workforce Characteristics - Growing Occupations

● Occupation Jobs Growth

Six-County Region



Nine-County Region



Workforce Characteristics - Top Earnings Houston ZIP

● 2018 Median Hourly Earnings



Workforce Characteristics - Top Earnings

● 2018 Median Hourly Earnings

Texas County



Workforce Characteristics - Top Earnings

● 2018 Median Hourly Earnings

Six-County Region



Workforce Characteristics - Top Earnings

Nine-County Region

● 2018 Median Hourly Earnings



Workforce Characteristics - Overview

Houston

Occupation	2013 Jobs	2018 Jobs	Change in Jobs	% Change in Jobs	2018 LQ	2018 Median Hourly Earnings
Office and Administrative Support	373	374	1	+0%	1.03	\$12.06
Sales and Related	314	315	1	+0%	1.26	\$10.27
Healthcare Practitioners and Technical	296	277	-19	-6%	1.96	\$22.63
Food Preparation and Serving Related	242	237	-5	-2%	1.12	\$8.70
Production	214	234	20	+9%	1.58	\$12.35
Education, Training, and Library	180	163	-17	-9%	1.14	\$15.86
Transportation and Material Moving	152	126	-26	-17%	0.73	\$12.86
Healthcare Support	149	116	-33	-22%	1.71	\$10.43
Personal Care and Service	83	106	23	+28%	0.95	\$9.49
Installation, Maintenance, and Repair	97	101	4	+4%	1.02	\$15.49
Management	90	90	0	0%	0.61	\$26.93
Construction and Extraction	91	86	-5	-5%	0.73	\$15.48
Building and Grounds Cleaning and Maintenance	78	68	-10	-13%	0.74	\$9.52
Business and Financial Operations	67	59	-8	-12%	0.44	\$23.17
Protective Service	51	53	2	+4%	0.93	\$13.94
Community and Social Service	47	48	1	+2%	1.13	\$16.58
Arts, Design, Entertainment, Sports, and Media	24	20	-4	-17%	0.42	\$17.49
Computer and Mathematical	44	48	4	+9%	0.25	\$23.61
Military-only	45	41	-4	-9%	1.02	\$19.05
Life, Physical, and Social Science	36	36	0	0%	0.65	\$22.54
Legal	23	24	1	+4%	0.44	\$27.36

Workforce Characteristics-Overview

Texas County

Occupation	2013 Jobs	2018 Jobs	Change in Jobs	% Change in Jobs	2018 LQ	2018 Median Hourly Earnings
Office and Administrative Support	925	875	-50	-5%	0.91	\$12.44
Production	669	622	-47	-7%	1.60	\$13.49
Sales and Related	618	619	1	+0%	0.94	\$10.25
Transportation and Material Moving	669	541	-128	-19%	1.19	\$15.15
Education, Training, and Library	561	536	-25	-4%	1.43	\$16.05
Food Preparation and Serving Related	481	459	-22	-5%	0.83	\$8.72
Construction and Extraction	390	405	15	+4%	1.31	\$16.02
Healthcare Practitioners and Technical	426	392	-34	-8%	1.06	\$21.77
Installation, Maintenance, and Repair	324	310	-14	-4%	1.19	\$16.79
Personal Care and Service	237	303	66	+28%	1.03	\$9.46
Management	299	283	-16	-5%	0.73	\$26.45
Protective Service	255	254	-1	0%	1.70	\$14.11
Building and Grounds Cleaning and Maintenance	221	210	-11	-5%	0.87	\$10.08
Healthcare Support	278	200	-78	-28%	1.13	\$10.46
Business and Financial Operations	176	163	-13	-7%	0.47	\$23.06
Community and Social Service	154	163	9	+6%	1.46	\$16.69
Farming, Fishing, and Forestry	112	73	-39	-35%	1.48	\$14.77
Architecture and Engineering	41	53	12	+29%	0.47	\$27.48
Arts, Design, Entertainment, Sports, and Media	56	52	-4	-7%	0.43	\$17.43
Computer and Mathematical	44	48	4	+9%	0.25	\$23.61
Military-only	45	41	-4	-9%	1.02	\$19.05
Life, Physical, and Social Science	36	36	0	0%	0.65	\$22.54
Legal	23	24	1	+4%	0.44	\$27.36

Workforce Characteristics - Overview

Six-County Region

Occupation	2013 Jobs	2018 Jobs	Change in Jobs	% Change in Jobs	2018 LQ	2018 Median Hourly Earnings
Office and Administrative Support	5,309	5,047	-262	-5%	0.92	\$12.88
Production	4,213	3,966	-247	-6%	1.78	\$13.82
Sales and Related	3,781	3,788	7	+0%	1.01	\$11.03
Transportation and Material Moving	3,217	3,015	-202	-6%	1.16	\$14.25
Food Preparation and Serving Related	2,724	2,847	123	+5%	0.89	\$9.17
Education, Training, and Library	2,649	2,651	2	+0%	1.23	\$17.01
Healthcare Practitioners and Technical	2,325	2,409	84	+4%	1.13	\$23.46
Personal Care and Service	1,596	2,021	425	+27%	1.21	\$10.10
Construction and Extraction	1,839	1,907	68	+4%	1.08	\$15.91
Installation, Maintenance, and Repair	1,747	1,787	40	+2%	1.20	\$16.94
Management	1,693	1,701	8	+0%	0.77	\$27.30
Healthcare Support	1,598	1,437	-161	-10%	1.41	\$11.39
Building and Grounds Cleaning and Maintenance	1,301	1,189	-112	-9%	0.86	\$10.22
Business and Financial Operations	1,082	1,069	-13	-1%	0.53	\$22.95
Protective Service	808	817	9	+1%	0.96	\$14.15
Community and Social Service	742	715	-27	-4%	1.12	\$17.45
Farming, Fishing, and Forestry	568	428	-140	-25%	1.51	\$14.22
Arts, Design, Entertainment, Sports, and Media	343	335	-8	-2%	0.48	\$16.47
Architecture and Engineering	331	297	-34	-10%	0.46	\$28.31
Computer and Mathematical	279	283	4	+1%	0.25	\$24.46
Military-only	225	205	-20	-9%	0.89	\$19.02
Life, Physical, and Social Science	145	134	-11	-8%	0.43	\$23.17
Legal	110	120	10	+9%	0.38	\$27.48

Workforce Characteristics - Overview

Nine-County Region

Occupation	2013 Jobs	2018 Jobs	Change in Jobs	% Change in Jobs	2018 LQ	2018 Median Hourly Earnings
Office and Administrative Support	12,340	11,898	-442	-4%	0.83	\$13.75
Production	8,275	8,964	689	+8%	1.54	\$14.89
Food Preparation and Serving Related	7,874	8,571	697	+9%	1.03	\$9.48
Sales and Related	8,311	8,335	24	+0%	0.85	\$11.26
Transportation and Material Moving	7,513	7,563	50	+1%	1.11	\$14.26
Education, Training, and Library	6,663	6,324	-339	-5%	1.13	\$19.25
Military-only	6,981	5,950	-1,031	-15%	9.86	\$20.44
Healthcare Practitioners and Technical	5,338	5,672	334	+6%	1.02	\$23.92
Installation, Maintenance, and Repair	5,322	5,203	-119	-2%	1.34	\$19.78
Management	4,586	4,705	119	+3%	0.82	\$30.53
Construction and Extraction	4,273	4,386	113	+3%	0.95	\$17.45
Personal Care and Service	3,248	3,919	671	+21%	0.90	\$10.36
Business and Financial Operations	3,401	3,363	-38	-1%	0.64	\$26.53
Building and Grounds Cleaning and Maintenance	3,002	3,104	102	+3%	0.86	\$11.09
Healthcare Support	3,145	3,000	-145	-5%	1.13	\$11.78
Protective Service	2,163	2,100	-63	-3%	0.94	\$15.15
Community and Social Service	1,875	1,950	75	+4%	1.17	\$17.72
Architecture and Engineering	1,081	1,090	9	+1%	0.65	\$30.85
Arts, Design, Entertainment, Sports, and Media	1,089	1,061	-28	-3%	0.58	\$17.21
Computer and Mathematical	920	930	10	+1%	0.32	\$27.36
Farming, Fishing, and Forestry	799	674	-125	-16%	0.91	\$14.64
Life, Physical, and Social Science	585	524	-61	-10%	0.64	\$25.78
Legal	335	331	-4	-1%	0.40	\$26.04

Employers Perspective

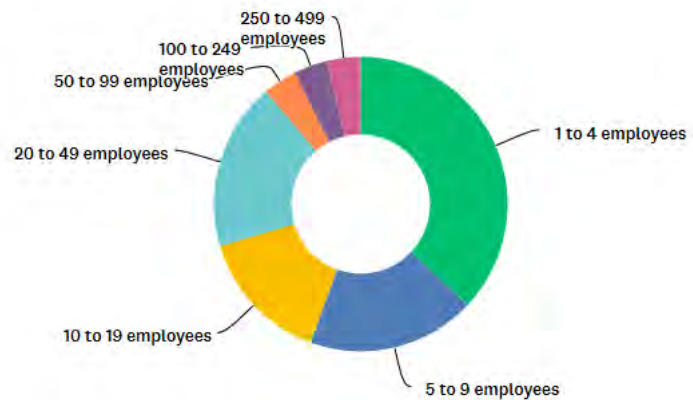


Employer Perspective

Houston has a strong base of current employers who provide a wide array of jobs. As the seat of Texas County, Houston has a strong government employment sector, which is bolstered by the county-owned hospital. There is also a regional office for the USDA Forestry Service and regional state correctional facility that add to government employment. Houston has a good manufacturing presence and is also has a wide array of smaller employers including retail and finance, insurance & real estate (FIRE).

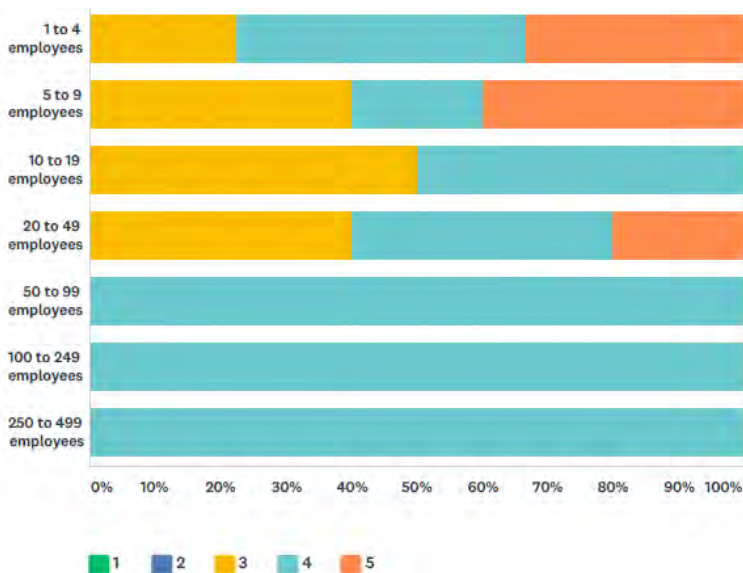
It is important to understand the labor market from the employer perspective, to know the key issues companies are facing and to also address that information in the survey of area residents.

The employer survey was not a comprehensive survey of all employers but a snapshot of companies active in the community and Chamber of Commerce. The survey included input from two of the top health care employers, two of the top manufacturing employers and a array of FIRE sector, retail and professional firms along with government.



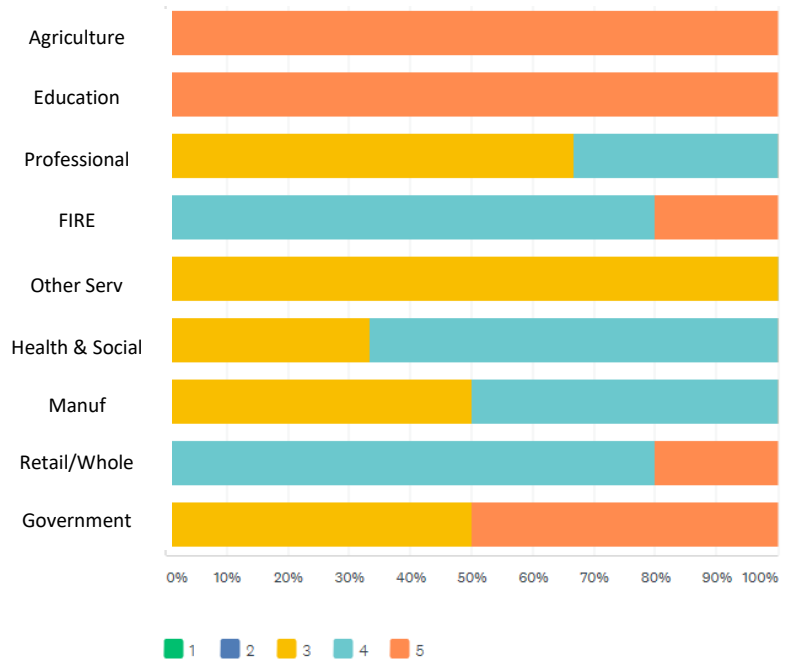
A total of twenty-seven (27) firms responded. The majority of firms had less than ten employees; typical in most communities where small business plays a big role.

- Quality of Workforce: Companies overall gave a strong ranking to the quality of workforce. On a scale of 1 to 5, with 1 being the lowest ranking and 5 the highest, the aggregated ranking was 3.9.



Overall, no company ranked its labor force less than a 3. Smaller firms had more span of response, ranging from 3 to 5. The top employers, which included most manufacturing and health care, were solidly 4 in the ranking on quality of workforce.

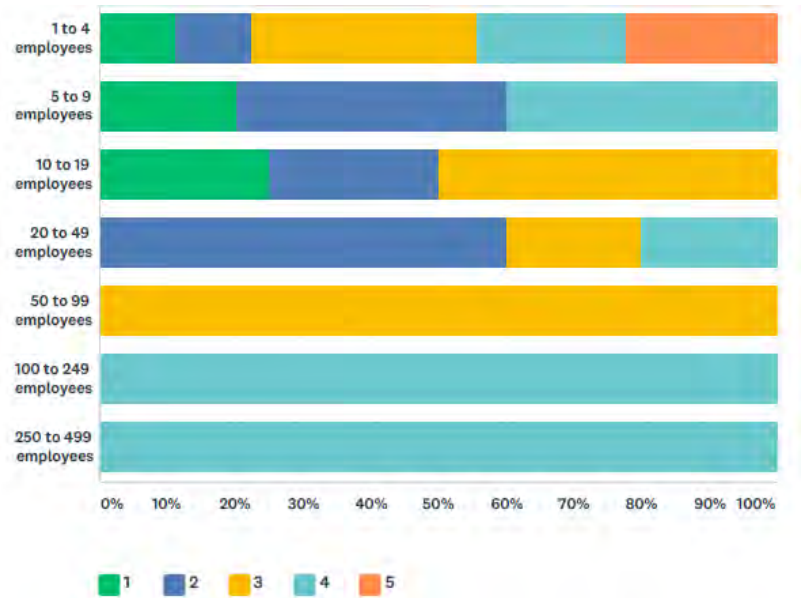
The respondents had a broader diversity. When broken down by employment sector. Agriculture and Education services had solid 5's. Health and Social Services was strongly 4, but had a 3 response as did Manufacturing. Those in Retail/Wholesale Trade and Professional Services rated their workforce quality as 4 and 5.

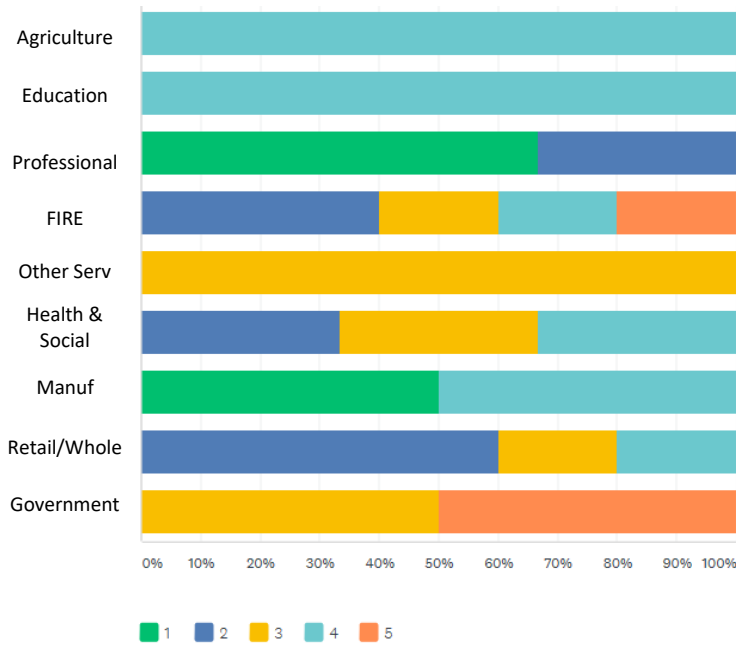


- Availability of Workforce: While giving high marks to the quality of workforce skills, employers noted that availability is a growing issue. Overall the availability of workforce was given a ranking of 2.9 on a 5 point scale.



Smaller size employers indicated more issues with workforce availability. The lowest rank of 1 showed up in responses of firms with up to 19 employees. Larger employers, 50+ workers, rated workforce availability at average or higher (4).





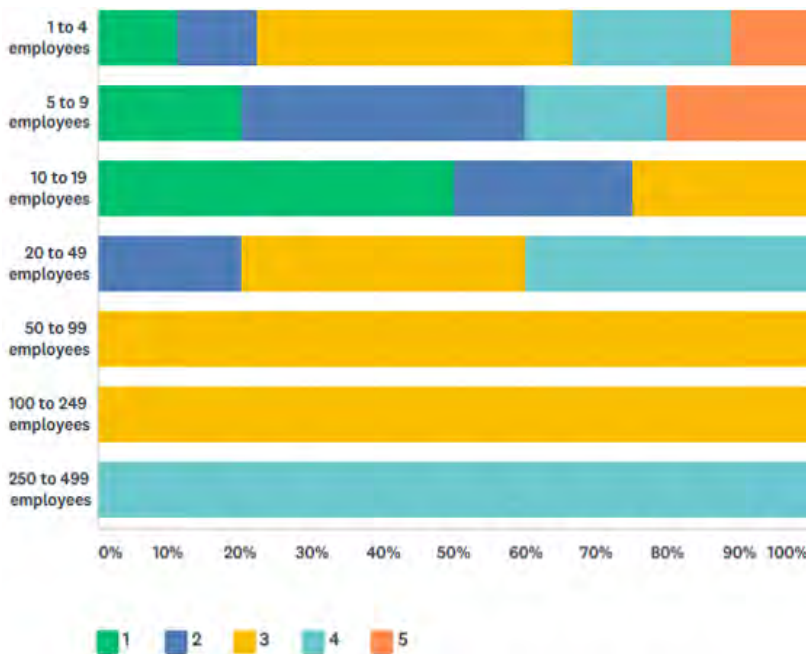
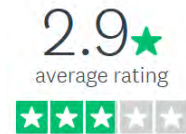
As with quality of workforce, business sectors also had a difference in view on the availability of workforce

Agriculture and Education generally ranked availability highly. Professional Services ranked availability on the low end of the spectrum.

Health Care and Social Services generally landed in the middle; with rankings from 2 to 4. Manufacturing input had rankings of 1 and 4; with commentary noting required skills determined the rankings.

Government ranked availability from average to top ranked 5.

- Skills of New Hires: Employers were asked to rate the skills of their new hires in relation to the job. The response was a 2.9 on a 5 scale, or about average.



In general, smaller employers reported a wider array of skills match up; due in part to more total responses of companies from one to fifty employees. That mix of response also tended to be lower, with the **emphasis on “average” with a 3 or lower.**

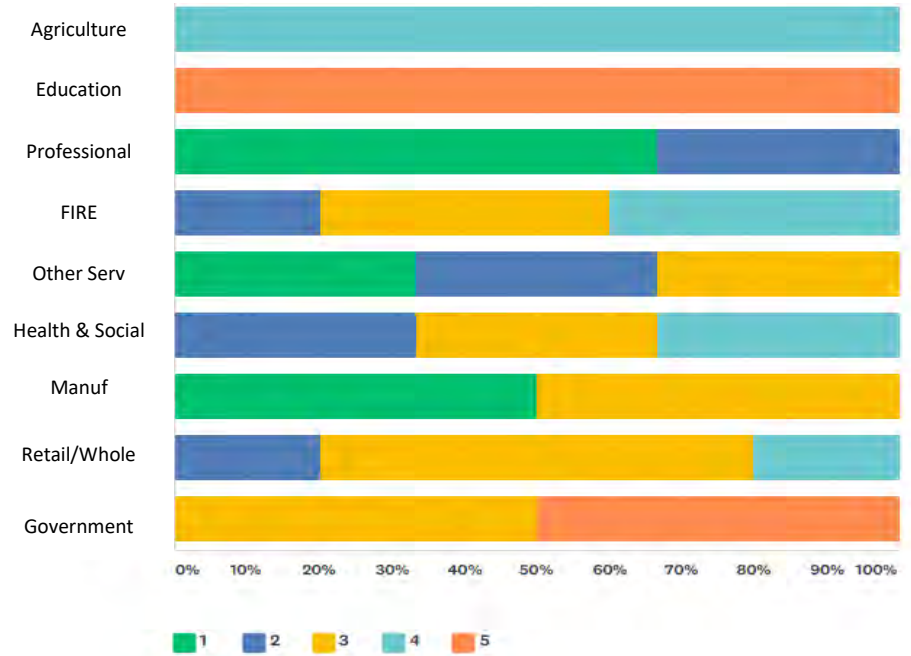
Larger employers tended to rate the **skills match up as “average” or slightly higher with a 4.**

In terms of comments, employers had concerns with applicants lack of hard skills related to the specific job, but more importantly they pointed out a lack of soft skills in terms of work ethic, worksite behavior and communications.

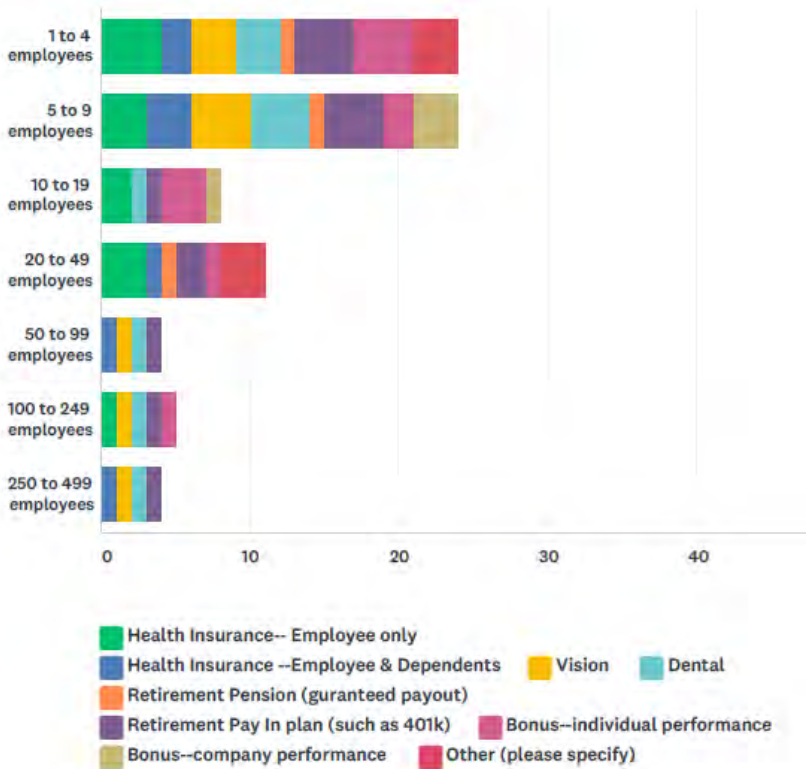
As with availability of workforce, business sectors also had a difference in view on the skills of new hires related to the jobs.

Agriculture and Education generally ranked availability highly, at 4 and 5. Professional Services ranked skills on the low end of the spectrum.

Health Care and Social Services generally landed in the middle; with rankings from 2 to 4. Manufacturing input had rankings of 1 and 3; with commentary noting required skills determined the rankings.



- Employee Benefit Package: Employers noted that pay is the number one consideration when people are considering a job and that pay can vary based on skills and experience. A close second is benefits and Houston area employers make an effort to provide the best package they can.



Smaller employers reported a wider array of benefit options. In part this is due to number of responding firms but also due to creative efforts to maximize limited resources.

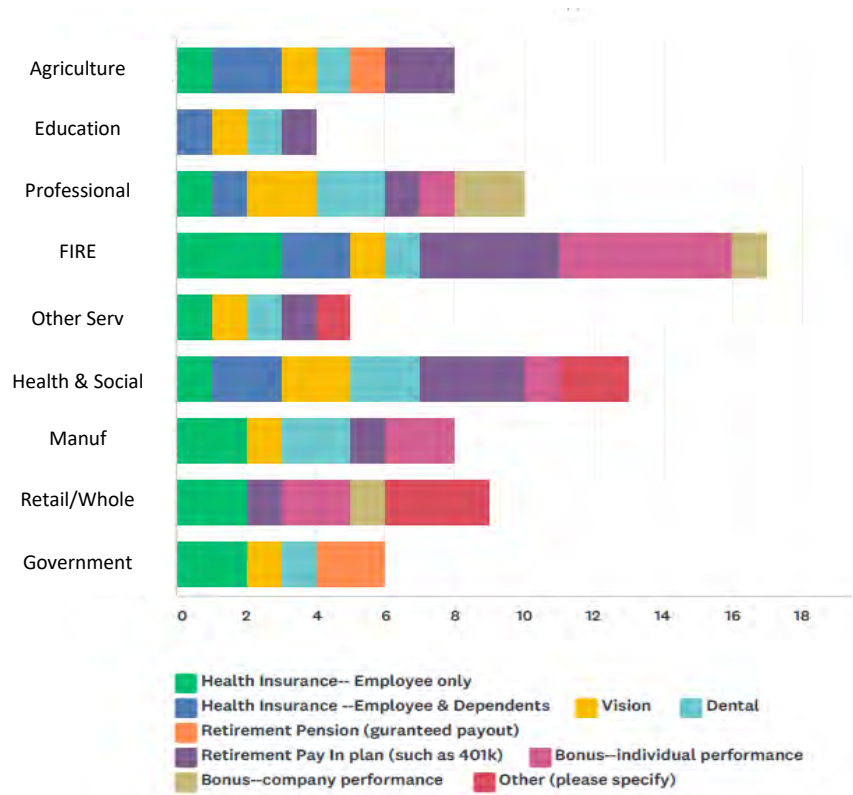
Companies up to fifty employees indicated strong use of bonus plans for individual and/or company performance. Several offered a 401K retirement plan.

Retirement plans tended to be “payin” plans, such as a 401K. Pension or “guaranteed payout” plans were used more in government entities.

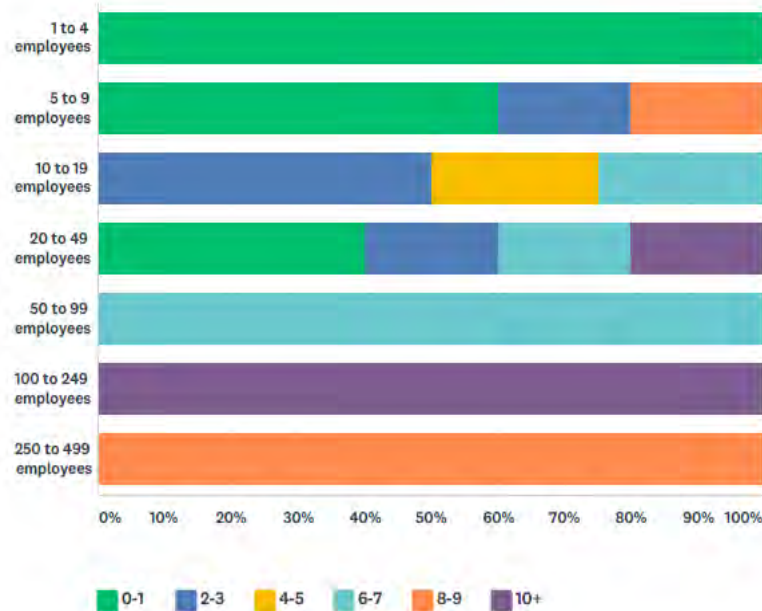
Larger firms had more standard benefit plans with health insurance for employees and dependents, with vision and dental packages.

By business sector, Professional Services, FIRE, Retail and Manufacturing indicated use of bonus plans. Professional, FIRE and Retail had some use of company performance bonuses as well.

Health and Social Services, Other Services and Retail indicated use of “Other”. Comments indicated the “Other” benefit was typically flex-time and/or paid time off. Family leave time was also noted.



- Employee Turnover Rate: Employers are concerned about turnover rate, especially in a tight labor market. As noted above, employers are satisfied with the Quality of their



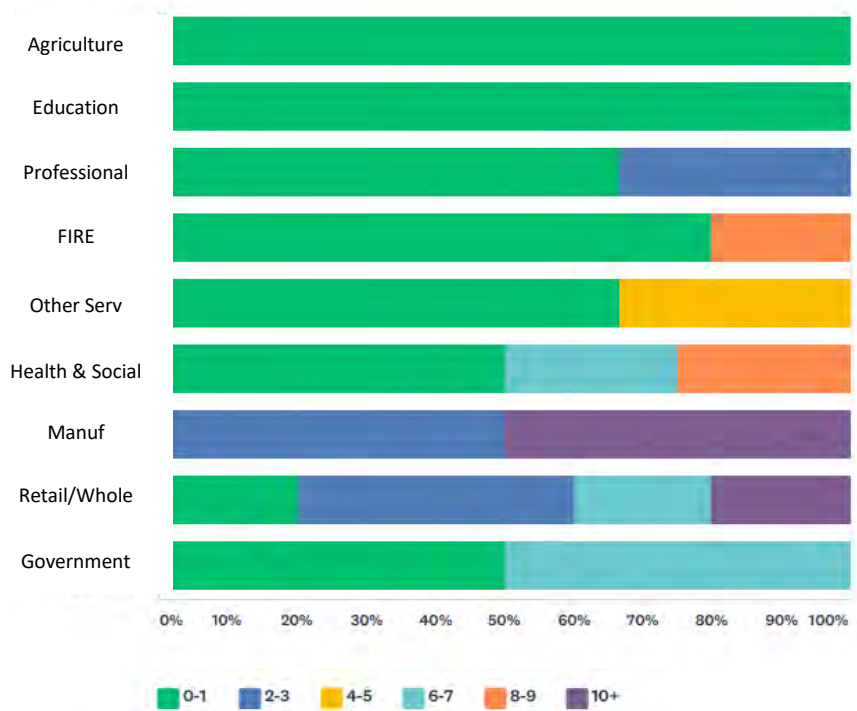
workforce. The most churn or turnover, as made in employer comments, seems to be in the first few weeks of employment. If employees stay through that period **they are usually in “for the long haul” as several employers said.**

Smaller firms, where hiring is more personalized, more typically had less turnover usually less than three percent. The few larger firms responding were in the eight to nine percent annual turnover rate annually.

By business sector, Agriculture, Education and the Service sectors had the lowest turnover rate.

Health and Social Services generally reported low turnover, but some respondents noted higher turnover rates.

Retailers had the widest array of responses from very low to over ten percent annually. Manufacturing averaged six to seven percent while Government averaged three to four percent.



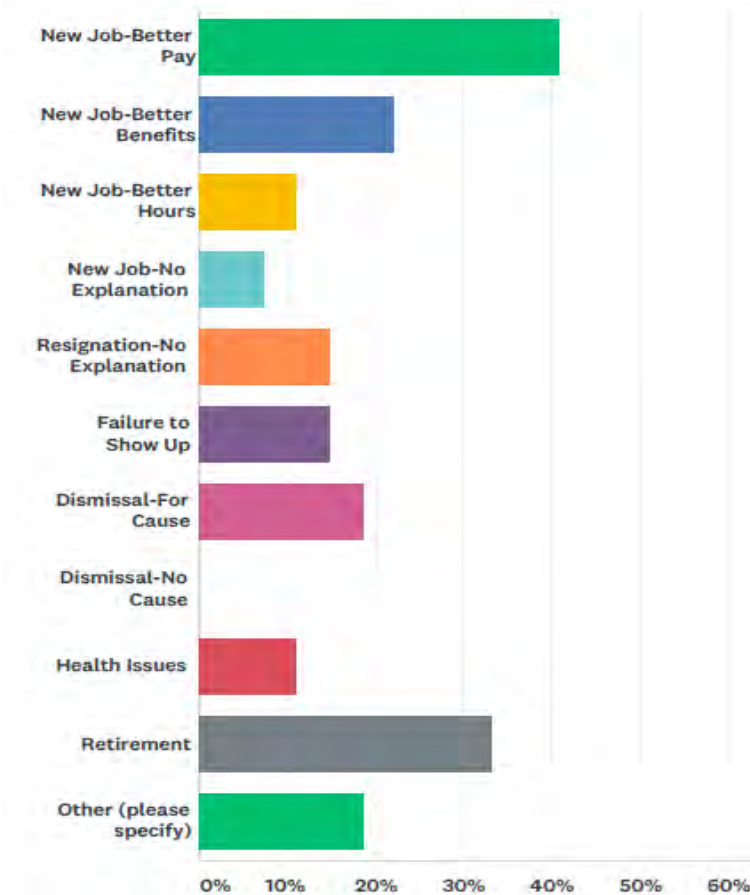
- Reasons For Turnover: Employers were asked the reasons employees gave for leaving the job. This input was used in the residents survey to validate employer tracking. As expected

Better Pay was a key driver given as the reason for leaving a job. However, the second highest reason was Retirement. The Baby Boomer generation is retiring in increasingly larger numbers, presenting challenges for many communities.

Second highest reason for those not retiring was to obtain Better Benefits. Several employers noted they were looking at their benefit package, especially health insurance, to retain good employees.

Better Hours were also noted as reason for leaving. In “other” comments given to employers were shorter commuting time and different shift, both reinforcing a desire for better working hours.

Also noted were Dismissals for Cause. Several employers noted that often the cause was a fail to show up with no explanation.

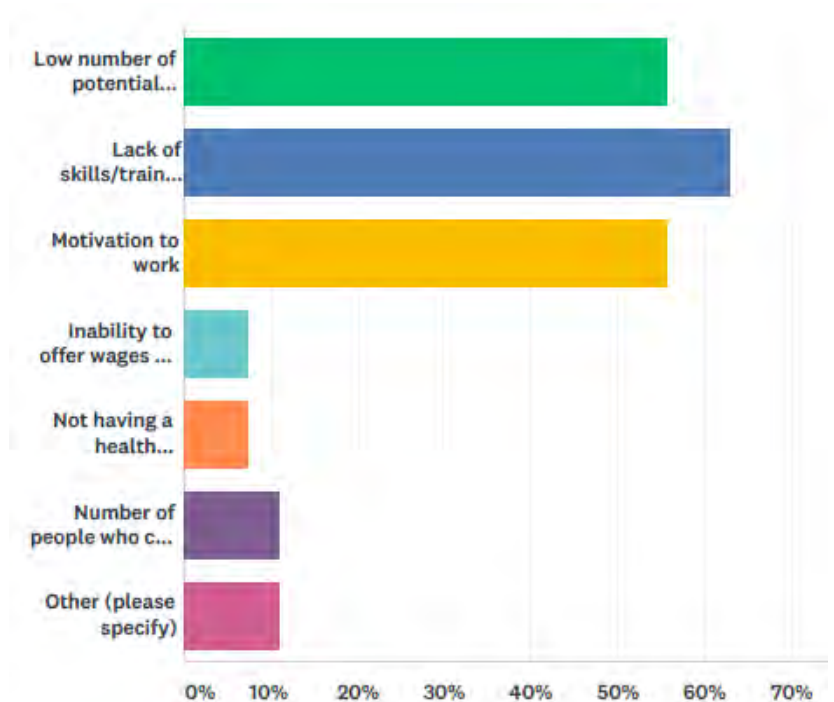


- Difficulties In Hiring: Finally employers were asked the major reasons they have for difficulties in hiring qualified workers.

Employer could check “all that apply”. The highest difficulty noted was “Lack of Skills or Training, A Low Number of potential workers as well as finding employees with a Motivation to Work were also the high reasons.

Some Employers noted their inability to offer higher wages and/or a health care plan.

Also noted were the Number of People who can not pass a drug test.



- One Thing That Would Help Retain Workforce: Employers were asked the open-ended question of what “one thing” would help them recruit and retain the workforce they need.

Those answers were:

- Trained & motivated workers
- Training /education
- Being able to offer more benefits
- Health benefits
- Applicants with some skills/aptitude for the work
- Higher wages
- Healthcare
- Better training and teaching of job trades in high school. Welding, electrical, carpentry, HVAC
- We would love to be able to offer an employee health plan, but it’s cost prohibitive.
- Better pay and benefits
- Educational opportunities in the community
- Training Programs
- Better Benefits and higher Pay
- Higher Pay
- Local Technical School
- Compensation
- If employees understood the value of their benefits & bonus. Those who leave for better pay look only at hourly. Our benefits and bonus typically calculate to be higher than competitors, however employees only look at the hourly wage.
- That is a very good question. We offer competitive pay. And retirement and medical insurance.
- More qualified people in the area
- Higher pay
- Increased sales that would in turn give us the ability to offer higher hourly wages.

- Best Success in Recruiting: Employers were asked where they find the best success in recruiting new employees. Those answers were:
 - Pen Mac (staffing firm)
 - Church
 - Newspapers
 - Word of mouth
 - Ads and word of mouth
 - Penmac Services
 - We have not had measurable success recruiting talent in Houston in the last 5 years
 - Advertising
 - On-line
 - Facebook
 - Word of mouth
 - Word of mouth
 - Find a person willing to work and train them in-house
 - Advertising & Word of mouth
 - Nursing Schools, Penmac
 - Indeed
 - Nation Wide
 - Word of mouth from current employees.
 - Online
 - Within organization
 - Current employee referrals
 - Word of Mouth
 - Advertisement
 - Classified ads and social media posts

Workforce Availability



Residents Perspective

Background:

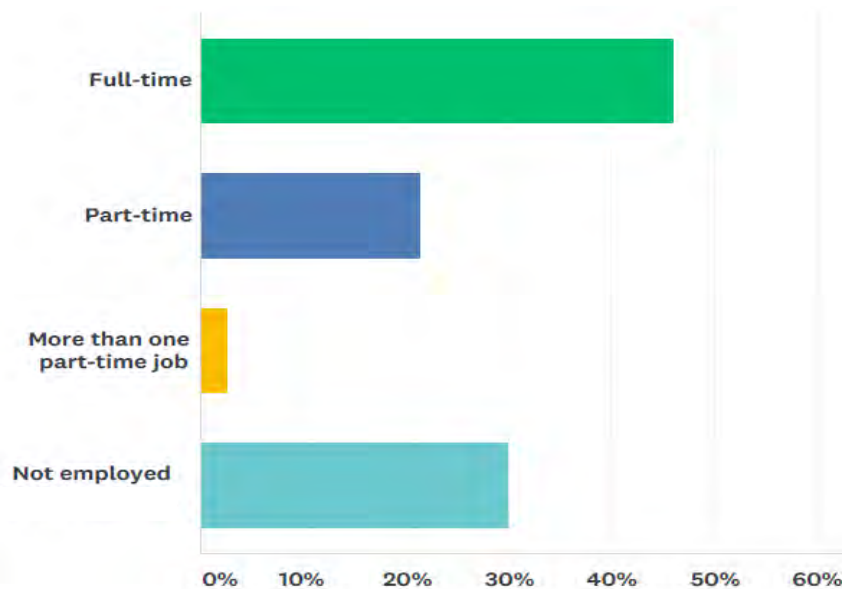
Three-hundred and eleven (311) completed surveys were received from area residents, providing a strong confidence level (95%) that the input provided could be taken across the overall population in Texas County and the broader region.

More specifically the survey was taken by people 17 to 69 reflecting those who are in or likely to be in the workforce in the next year as well as those who still working or may work past the age of 64. The US Census breaks down age categories from 15-19, so the additional population under age 17 was not surveyed although that small group was reflected in the overall population.

Of the 311 people who participated, 226 indicated (72%) indicated employment at either a full-time or part-time level.

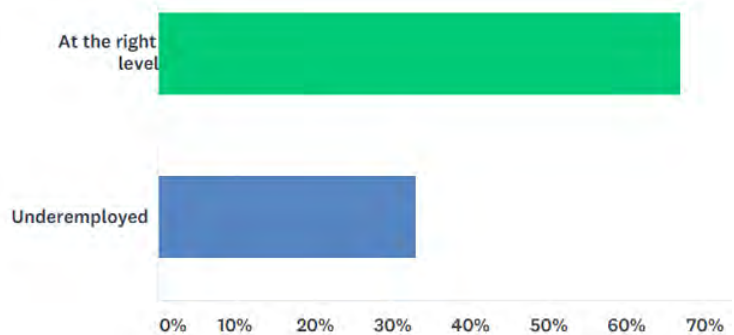
One-hundred and forty-two (142) of the respondents are employed full-time. Seventy-four (74) are employed part-time, with eight of those indicating employment at more than one part-time job. For the purposes of the survey these were rolled into a **“part-time”** category.

The remainder were not employed and self-selected as Retired, Disabled or Homemaker.



Those employed indicated an overall with their jobs with a 3.8 on a 5 scale. This mirrors employer’s overall satisfaction with the overall Quality of the workforce question with a 3.9.

Those employed were asked if they are employed **“At the Right Level”** or **“Underemployed”** based on their training, skills and experience. Two-thirds of those responding believed they are employed **at the “Right Level”**.



General Labor Availability:

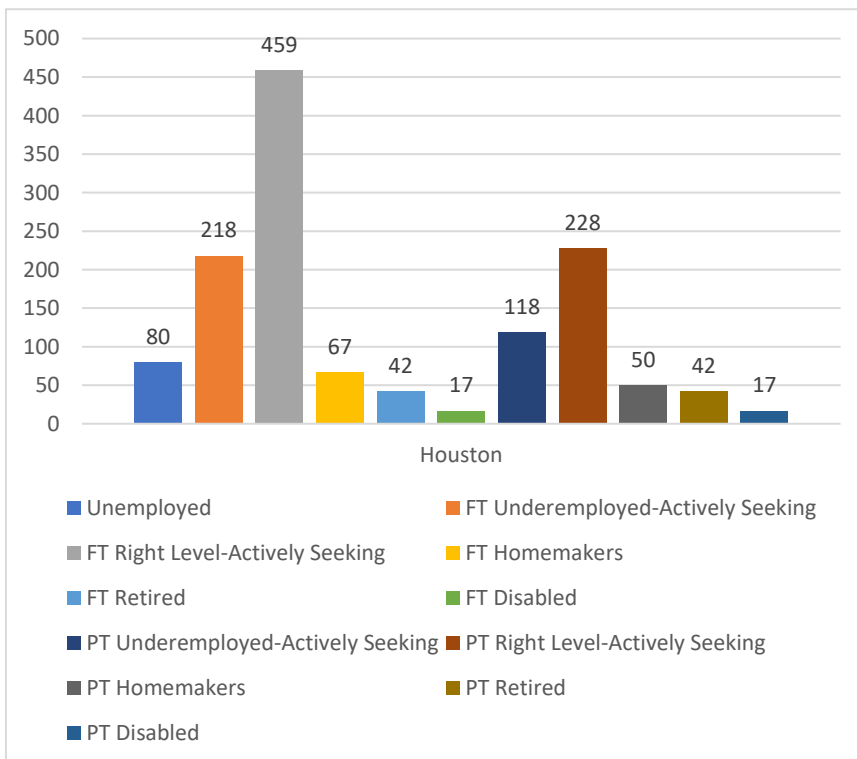
The study asked if people are actively seeking new work at the time of the survey OR if they would consider new employment if there was a new job. Sixty-two percent (62%) of respondents indicated that would be the case. For those noting themselves as unemployed the survey asked if they were homemakers, retired or disabled and if they would consider reentering the workforce at either a part-time or full-time position. Approximately eight percent (8%) of that group indicated they would be willing to return to the workforce.

These percentages were then applied to the larger population to determine the potential available labor pool that could be available based on wages, benefits and commute time.

Actual number of unemployed from the state labor statistics, averaged for 2018, was used to note those actually seeking work and assumed to want full-time employment.

The survey results were applied to the total population between the ages of 15-69 in the target area to determine a potential labor availability.

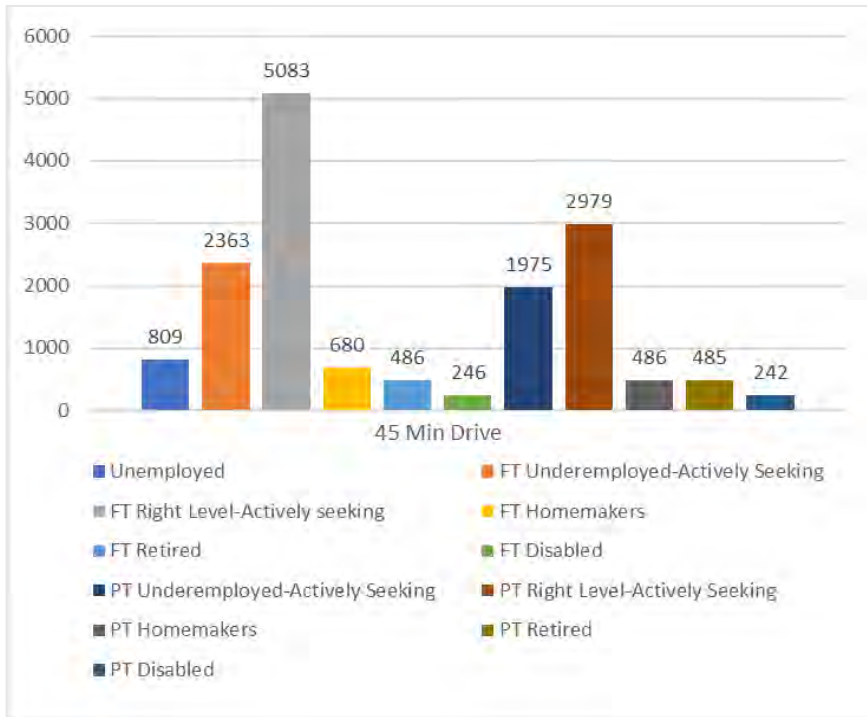
- Houston Zip Area: There are 2,912 residents in the 15-69 age range in total. Of that, 1,338 are available for employment at some level.



For full-time employment there are 677 people currently employed that are actively seeking or could be interested in a new job. Homemakers, retirees, disabled and unemployed add another 206 for a total of 883 potential people seeking new full-time employment options.

For part-time employment there are 346 currently employed that are actively seeking or could be interested in a new job. Homemakers, retirees and disabled add another 109 for a total of 455 potential people seeking new employment opportunities.

- Texas County: There are 17,528 residents in the 15-69 age range in total. Of that, 8,544 are available for employment at some level.



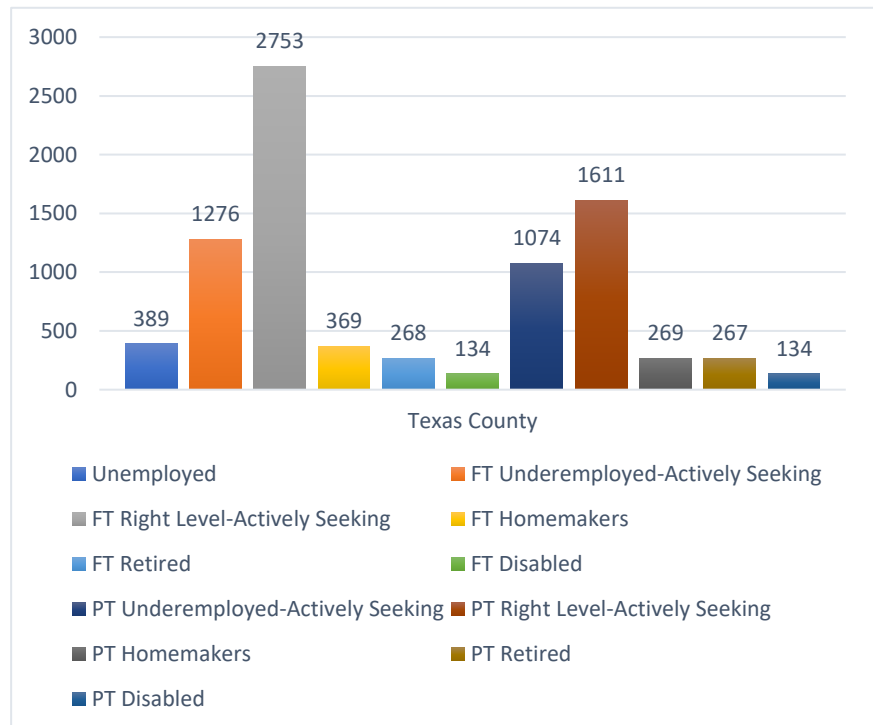
For full-time employment there are 4,029 people currently employed and actively seeking or could be interested in a new job. Homemakers, retirees, disabled and unemployed add another 1,160 for a total of 5,189 people seeking new full-time employment options.

For part-time employment there are 2,685 currently employed and actively seeking or could be interested in a new job. Homemakers, retirees and disabled add another 670 for

a total of 3,355 potential people seeking new part-time employment opportunities.

- 45 Minute Drive Time: There are 32,375 residents in the 15-29 age range in total. Of that, 15,834 are available for employment at some level.

For full-time there are 7,446 people currently employed and actively seeking or could be interested in a new job. Homemakers, retirees, disabled and unemployed add another 2,221 for a total of 9,667 potential people seeking new full-time employment options.



For part-time employment there are 4,954 people currently employed who are actively seeking or could be interested in new employment. Homemakers, retirees and disabled add an additional 1,213 for a total of 6,167 potential people seeking new part-time employment options.

Commute Time:

The study looked at how far people would go for a given wage, assuming their interest in working at that wage. This question was asked of those currently employed as well as those currently not employed but willing to come back to the workforce.

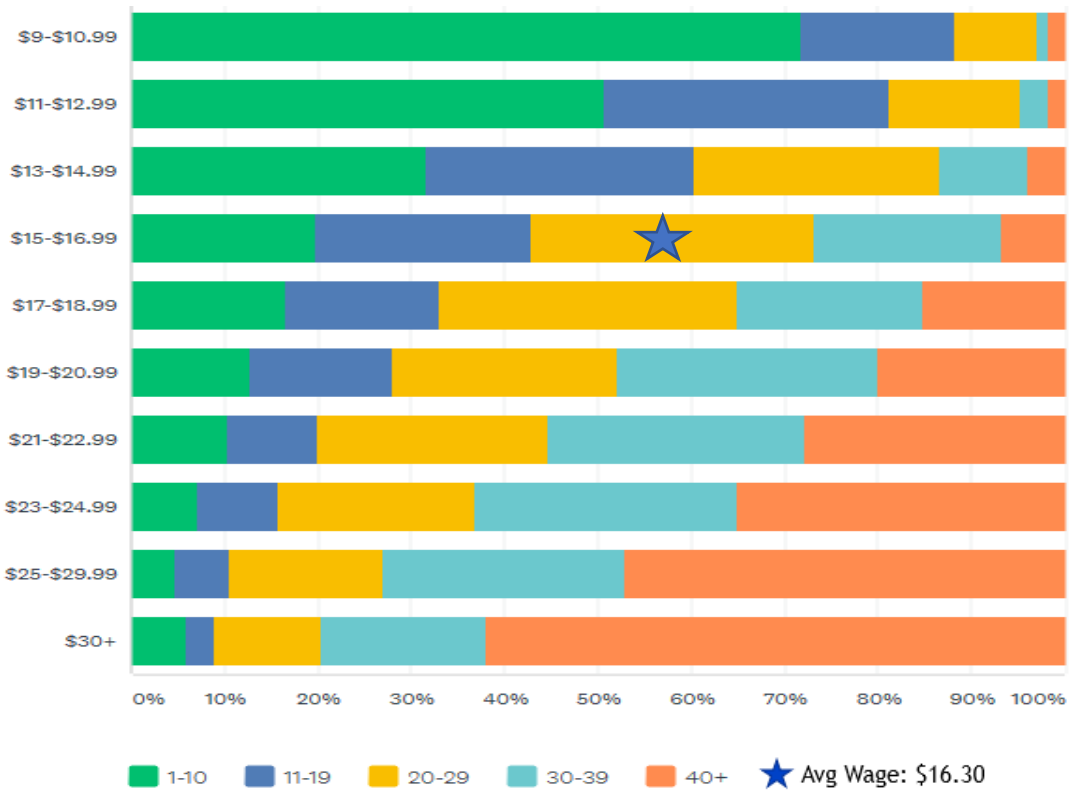
With Missouri's minimum wage at \$8.60 per hour, the lowest test wage was set at \$9.00, with each additional level starting \$2.00 per hour higher.

As may be anticipated, at the lowest wage most people interested will drive ten minutes, with some additional people willing to commute up to

nineteen minutes. There is little willingness to commute any farther than nineteen minutes. Nineteen minutes will bring about eighty-five percent (85%) of people interested in working at the wage.

Nearly thirty percent (30%) of those willing to work for \$13.00 - \$14.99 per hour are willing to drive ten to up to twenty minutes. Another nearly thirty percent (30%) will drive up to thirty minutes.

At a wage of \$17.00 - \$18.99 per hour, the commute time for thirty-five percent (35%) of respondents would be between twenty and thirty minutes; with another thirty-five (35%) willing to drive from thirty minutes to more than forty minutes



The willingness to commute for a longer period increases with wages paid. At \$30+ dollars per hour, 60% of the labor market will drive more than forty minutes. Eighty percent (80%) will drive more than 30 minutes.

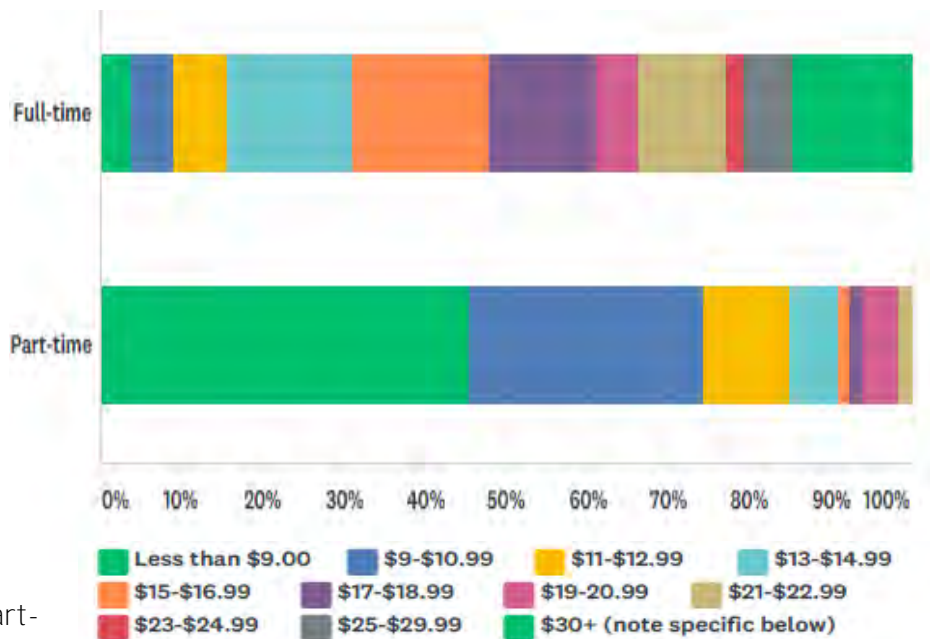
Wages and Benefits Paid:

In considering commuting time for the potential labor pool, the current wage base of jobs should also be considered.

For this part of the survey, there was the addition of a **“less than \$9.00 per hour”** choice to capture those working at or just above the state minimum wage of \$8.60 per hour.

Respondents working full-time, across the arrays of ages and experience, showed a broad range of hourly wages.

Half indicated wages below \$16.99 per hour or \$35,000 annually. For those working part-time, nearly half (45%) were at or slightly above the minimum wage.



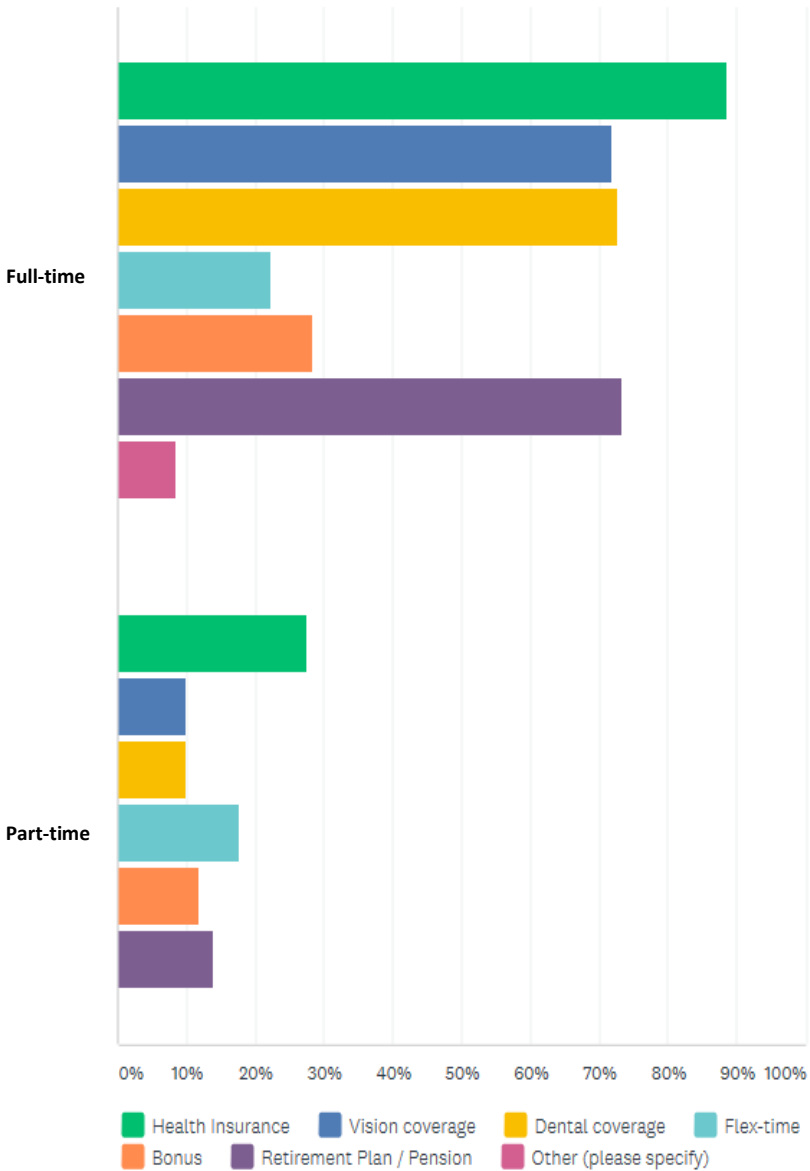
Those making from \$9.00 to \$10.99 per hour added an additional nearly 30% of those working part-time. In general, nearly 75% of those indicating they work part-time are paid \$10.99 per hour or less.

In terms of benefits, respondents were asked to select which benefits they currently receive, checking all that apply.

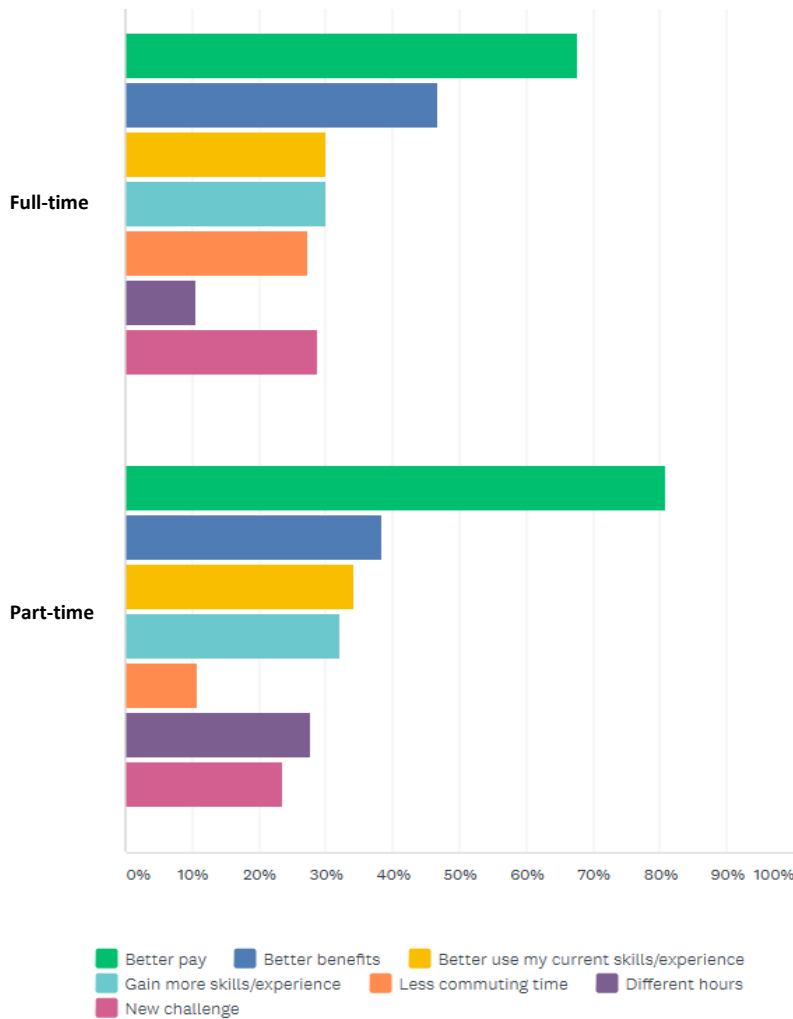
For full-time employees, at least 90% received health insurance, and many had vision and dental coverage as part of that plan. More than seventy percent (70%) had some form of pension or retirement plan.

Among “Other” benefits noted were tuition coverage for continuing education, paid holidays and family leave.

Part-time employees were more limited, although almost thirty percent (30%) had a health insurance plans, with about a third of those opting into vision and dental coverage. A small percentage also received bonus or had a retirement plan through their work. None noted any other benefits.



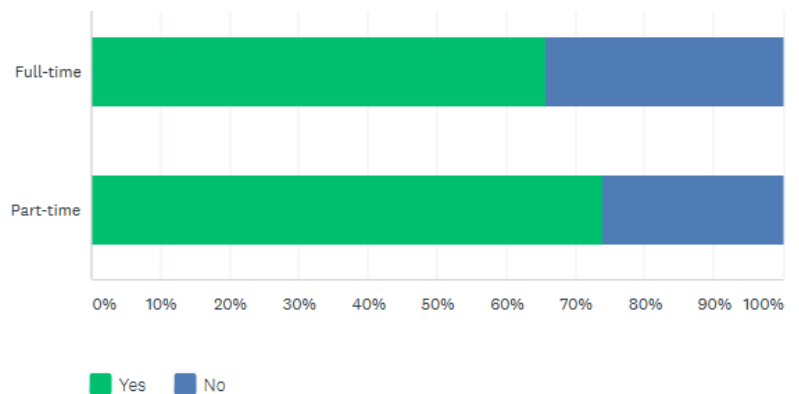
Drivers For New Employment: Those respondents who are actively seeking new employment or would entertain a new position if the right opportunity was presented, were asked what the key drivers would be for considering taking a new job. They were asked to check all that apply, rather than a single topic.



- Pay and Benefits: **“Better pay”** was the leading driver for both full-time and part-time employees. However, for part-time workers it was a significantly stronger driver than for those working full-time. **“Better benefits”** was a driver for nearly one-half of those working full-time. For those currently working part-time, benefits was noted as a key driver for nearly forty percent (38%); contrasting with the less than thirty percent (30%) who currently have some form of health coverage and ten percent (10%) who currently have dental or vision.

For those employed full-time, having less of a commute would have some bearing for about twenty-five percent (25%), but having **“Different hours”** was of less interest. Having a **“New challenge”** was of interest to nearly thirty percent (30%) of those working full time.

- Willingness to move to another field: Respondents were also asked about their willingness to change fields if the new job could utilize their skills, talents and experience. This opportunity to move from the service sector to manufacturing sector, for example, was of interest to nearly two-thirds (65%) of those in full-time positions. For those working part-time, the interest level went up to seventy-five percent (75%).



- Willingness to come back into the workforce:

For those currently not employed but willing to come back into the labor force (homemakers, retirees and disabled), pay is a key driver.

“Good pay” was of interest

to sixty percent (60%) of those willing to come back full-time. **“Good benefits”** was of interest to about twenty percent (20%) of those willing to come back into the workforce.

Several noted the opportunity to use their skills and experience again or to have a new challenge; but predominantly wages and benefits were key to attract people back into the workforce for full-time jobs.



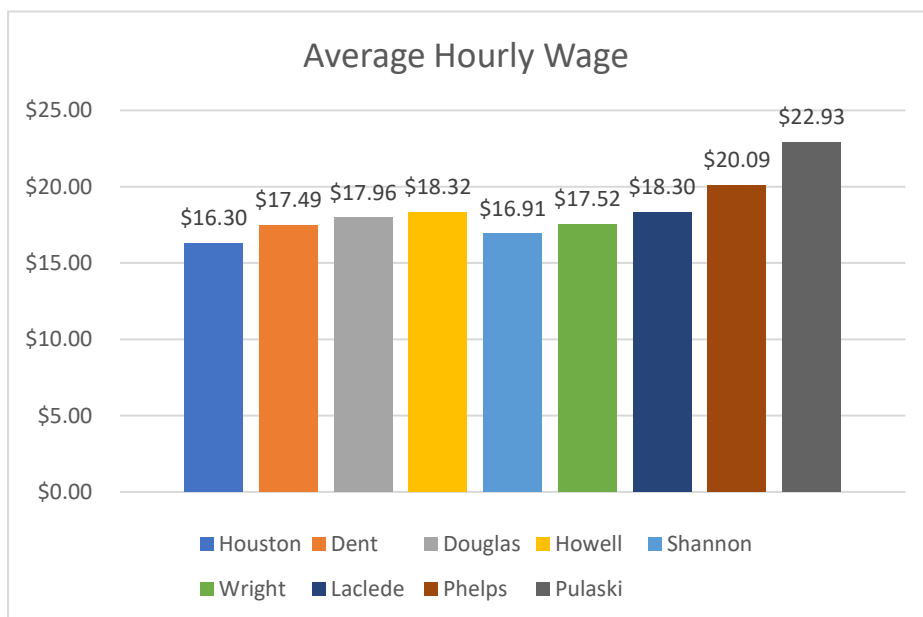
For those willing to come back for part-time jobs, **“good pay”** was the overwhelming driver with more than eighty percent (82%) saying that was their interest.

Average Wages:

Houston and Texas County are similar in average hourly wages across occupation sectors. Overall the area is very competitive on wages in comparison to Missouri and the region. However, the very competitive wage rates may also be a detriment to attracting and retaining a higher skilled workforce.

With the exception of Shannon County, every surrounding county has an overall average wage seven-percent (7%) or more higher than Houston.

Those counties along I-44 (Laclede, Phelps, Pulaski) are significantly higher however their population centers along the Interstate are an hour or more away. Phelps County is twenty-three percent (23%) higher; Pulaski is a major high-end outlier.



Also competing with Houston is West Plains in Howell County. West Plains is a major workforce importer and is only about forty-five minutes away from Houston.

As noted above, the typical commute time in Houston for those at the lower end of the pay scale is twenty minutes or less. A slight increase in wages expands that time up to thirty minutes. At the \$15.00 to \$16.99 pay rate, a little over half of the potential labor market will drive twenty minutes up to more than forty minutes for a job.

The overall average wage for Houston is \$16.30, so a general correlation can be made that the average wage will draw about thirty-five percent (35%) of the labor force in a range of twenty to thirty minutes. About thirty percent (30%) will NOT drive more than twenty minutes. Another thirty-five percent (35%) is available outside of a thirty-minute commute.

As noted above, a thirty-minute commute time encompasses almost all of Texas County. A forty-five-minute commute from Houston nearly doubles the labor market, but for people living twenty minutes or more from Houston, there becomes an opportunity to make higher wages in one of the surrounding counties. As an example, for people at the south end of Texas County, West Plains can provide an attractive employment option. Likewise, residents on the northeast side of Texas County and the area just into Phelps County, may see better opportunities in Rolla than Houston for the same thirty-minute +/- commute.

The following table indicates the average hourly wage for each Occupation Sector. Those highlighted in green show where Houston has a higher wage than the surrounding counties. It also is an indicator of what Houston area employers, existing or new, should consider maximizing the labor market potential.

The separate “Talent By Compensation” report gives specific job titles in three key Houston employment sectors. This report will help the Houston economic development team and employers more specifically understand the potential labor available at the “median” wage for Texas and surrounding counties.

Average Wages-Occupational Sectors (Green denotes where Houston is higher)

Occupation Sector	Houston	Dent	Douglas	Howell	Shannon	Wright	Laclede	Peelps	Pulaski
Management Occupations	\$29.53	\$34.05	\$31.56	\$34.10	\$29.47	\$31.58	\$33.13	\$37.32	\$38.73
Business and Financial Operations Occupations	\$25.84	\$28.17	\$28.14	\$26.53	\$26.46	\$28.12	\$31.34	\$31.28	\$29.73
Computer and Mathematical Occupations	\$26.59	\$28.72	\$27.31	\$28.14	Insuff. Data	\$29.11	\$33.79	\$31.98	\$32.05
Architecture and Engineering Occupations	\$26.14	\$31.21	\$30.74	\$31.04	Insuff. Data	\$30.22	\$30.47	\$35.30	\$35.35
Life, Physical, and Social Science Occupations	Insuff. Data	\$28.11	\$28.47	\$28.03	Insuff. Data	\$25.77	\$30.06	\$33.24	\$31.18
Community and Social Service Occupations	\$17.45	\$18.38	\$19.60	\$20.06	\$17.89	\$19.77	\$20.06	\$18.90	\$20.02
Legal Occupations	\$31.70	Insuff. Data	\$39.27	\$40.60	Insuff. Data	Insuff. Data	\$34.13	\$39.47	\$32.24
Education, Training, and Library Occupations	\$18.80	\$21.41	\$20.06	\$18.76	\$17.96	\$17.29	\$19.94	\$30.86	\$23.32
Arts, Design, Entertainment, Sports, and Media Occupations	\$18.58	\$20.23	\$23.26	\$24.76	\$26.87	\$23.43	\$22.58	\$22.30	\$26.37
Healthcare Practitioners and Technical Occupations	\$27.76	\$28.19	\$34.23	\$33.44	\$29.11	\$30.78	\$28.28	\$38.26	\$34.97
Healthcare Support Occupations	\$11.65	\$19.96	\$12.91	\$13.65	\$12.01	\$13.41	\$11.37	\$13.74	\$13.22
Protective Service Occupations	\$15.01	\$17.13	\$16.06	\$16.02	\$14.89	\$14.93	\$16.08	\$17.66	\$18.45
Food Preparation and Serving Related Occupations	\$9.07	\$10.05	\$9.33	\$10.39	\$9.44	\$9.34	\$10.32	\$10.50	\$11.59
Building and Grounds Cleaning and Maintenance Occupations	\$10.25	\$12.10	\$12.48	\$12.16	\$11.94	\$11.89	\$12.24	\$12.70	\$13.35
Personal Care and Service Occupations	\$10.70	\$10.93	\$11.32	\$11.58	\$10.46	\$11.99	\$12.25	\$12.45	\$11.50
Sales and Related Occupations	\$14.17	\$15.99	\$15.52	\$16.31	\$17.10	\$16.07	\$16.06	\$15.61	\$14.87
Office and Administrative Support Occupations	\$13.09	\$14.41	\$13.99	\$14.70	\$14.41	\$14.34	\$15.55	\$16.07	\$15.65
Farming, Fishing, and Forestry Occupations	\$15.23	\$18.70	\$16.85	\$17.22	\$18.39	\$17.45	\$14.66	\$17.51	\$17.31
Construction and Extraction Occupations	\$16.56	\$19.64	\$19.49	\$19.10	\$19.01	\$19.12	\$21.45	\$20.06	\$21.51
Installation, Maintenance, and Repair Occupations	\$16.10	\$19.60	\$18.87	\$19.26	\$17.93	\$19.30	\$20.20	\$20.72	\$25.29
Production Occupations	\$13.91	\$14.86	\$15.53	\$15.06	\$13.16	\$15.56	\$16.33	\$16.96	\$17.29
Transportation and Material Moving Occupations	\$14.29	\$16.80	\$16.94	\$16.49	\$18.44	\$18.37	\$15.76	\$15.98	\$26.10
Military-only occupations	\$0.00	\$22.38	\$22.60	\$22.83	\$22.53	\$22.58	\$22.38	\$22.38	\$24.69
Total Average Wage	\$16.30	\$17.49	\$17.96	\$18.32	\$16.91	\$17.52	\$18.30	\$20.09	\$22.93

Data Resources

Demographic and Labor market data is developed using Emsi Data. Employer and Resident information is based on surveys developed by **O’Brian & Associates, LLC in conjunction with the Economic Development Department of the City of Houston, MO.**

What is Emsi Data?

Emsi data is a hybrid dataset derived from **official** government sources such as the US Census Bureau, Bureau of Economic Analysis, and Bureau of Labor Statistics. Leveraging the unique strengths of each source, our data modeling team creates an authoritative dataset that captures more than 99% of all workers in the United States. This core **offering** is then enriched with data from online social **profiles**, resumes, and job postings to give you a complete view of the workforce.

Emsi data is frequently cited in major publications such as ***The Atlantic*, *Forbes*, *Harvard Business Review*, *The New York Times*, *The Wall Street Journal*, and *USA Today*.**



Industry Data

Emsi industry data have various sources depending on the class of worker. (1) For QCEW Employees, Emsi primarily uses the QCEW (Quarterly Census of Employment and Wages), with supplemental estimates from County Business Patterns. (2) Non-QCEW employees data are based on a number of sources including QCEW, Current Employment Statistics, County Business Patterns, BEA State and Local Personal Income reports, the National Industry-Occupation Employment Matrix (NIOEM), the American Community Survey, and Railroad Retirement Board statistics. (3) Self-Employed and Extended Proprietor classes of worker data are primarily based on the American Community Survey, Nonemployer Statistics, and BEA State and Local Personal Income Reports. Projections for QCEW and Non-QCEW Employees are informed by NIOEM and long-term industry projections published by individual states.

Occupation Data

Emsi occupation employment data are based on final Emsi industry data and final Emsi staffing patterns. Wage estimates are based on Occupational Employment Statistics (QCEW and Non-QCEW Employees classes of worker) and the American Community Survey (Self-Employed and Extended Proprietors). Occupational wage estimates also affected by county-level Emsi earnings by industry.

Staffing Patterns Data

The staffing pattern data in this report are compiled from several sources using a specialized process. For QCEW and Non-QCEW Employees classes of worker, sources include Occupational Employment Statistics, the National Industry-Occupation Employment Matrix, and the American Community Survey. For the Self-Employed and Extended Proprietors classes of worker, the primary source is the American Community Survey, with a small amount of information from Occupational Employment Statistics.

State Data Sources

This report uses state data from the following agencies: Missouri Department of Economic Development

Thank You

The study would not have been possible without the assistance and support of several organizations and individuals. Among those who supported the project are:

The City Council of Houston, MO

Robert Harrington, Economic Development Director, Houston

The Houston Chamber of Commerce

Angie Quinlin, Executive Director, Chamber of Commerce

The Houston Herald

Houston Schools

Durham Manufacturing

Texas County Memorial Hospital

Piney River Brewing

Millers Grill

Evans Sports

Houston House

Walmart

Team Profiles

Rob O'Brian has led Chambers of Commerce in economic development for more than thirty years. As



President of the Joplin (MO) Area Chamber, Rob led development of a small business incubator; a workforce training center in partnership with the local community college, City and workforce Investment board; and development and marketing of one of the premier business parks in southwest Missouri.

Rob is also a strong advocate for workforce development and worked closely with numerous companies and partners to make Joplin (Jasper County) the first ACT Work Ready Certified Community in the U.S.

While in leadership of the Missouri Economic Development Council, Rob helped legislators craft the Enhanced Enterprise Zoned and the Quality Jobs (Missouri Works) legislation; both of which are key economic development incentive programs for the state. Rob was one of the leaders who has led the rebuilding of the community from the devastating 2011 tornado and was recognized nationally by the Small Business Administration for those efforts.

Rob retired from the Joplin Chamber at the end of 2018 to pursue O'Brian & Associates, a consulting firm assisting chambers, EDOs and communities. Rob is a graduate of Ball State University with a BS in Telecommunications and minors in journalism and political science. He completed the Executive Management certification program at Notre Dame University and is a Certified Economic Developer as designated by the International Economic Development Council.

Frank Neely worked as a research analyst for the Workforce Investment Board of Southwest Missouri since 2008, providing labor market trends, intelligence, & projections to local economic and workforce developers & other organizations to aid in successful decision-making. In fall 2019 Frank became an independent workforce consultant for communities and businesses.



Frank's information has helped individual communities, counties and the seven-county Joplin Regional Partnership in their outreach for business attraction and expansion efforts. He also works to assist employers, industry groups, educators, and communities with the development and customization of both long and short-term registered and pre-apprenticeship training programs. Frank has also been a leader in the ACT Work Ready Community initiative, helping

Jasper County become the first certified Work Ready Community in the U.S.

Frank served four years in the United States Marine Corp. Following that he attended Missouri Southern State University graduating in 2006 with a Bachelor of Science in Political Science.