



# CLAY COUNTY, MISSOURI

---

## LABOR STUDY



June 2021

## Table of Contents

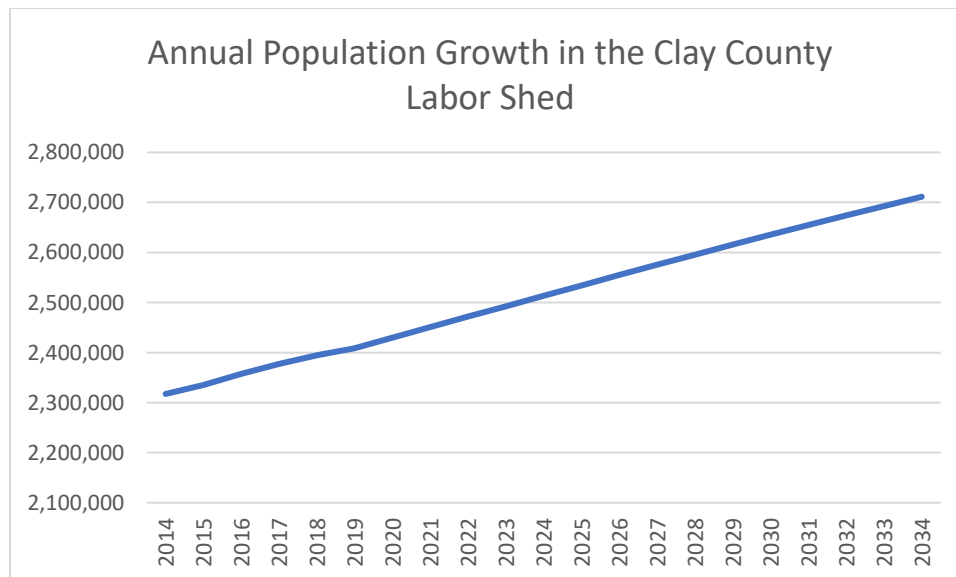
Executive Summary .....	3
Methodology .....	6
Labor Market Quantified.....	6
Cost of Living .....	12
Population Growth .....	12
Commuting Patterns .....	13
Educational Attainment in Clay County .....	14
Challenges Companies Face in the Workforce.....	14
Observations from In-Person Interviews of Local Employers.....	14
Primary Occupation Classifications .....	15
Top Employer Classifications .....	20
High Risk Industry Sectors.....	23
High Growth Potential Sectors .....	25
Workforce Training/Talent Pipeline .....	28
Targeted Business Sectors: .....	33
General & Advanced Manufacturing .....	33
Advanced Materials .....	33
Metalworking.....	34
Automotive.....	36
Food Manufacturing .....	37
Entertainment & Recreation.....	39
Transportation & Warehousing .....	39
Professional, Scientific, & Technical Services.....	40
Qualifications .....	43

## Executive Summary

Clay County, Missouri's, labor pool, featuring a population of more than 2.3 million people with approximately 1.2 million workers, is both more educated than the national average and has a population growing faster than the national average.

As compared to other parts of the country, most all of which are struggling to provide quality labor, Clay County's labor market is very strong, here are its strengths:

- A total of 94.6% of the working age population has a high school diploma or higher compared to the national average of 89%. Additionally, 24.6% of residents possess a bachelor's degree, which is 3.4% above the state average.
- Clay County's population has grown by 1.3% since 2015 compared to the US average of 0.7% population growth, and the Clay County labor shed has experienced population growth over the last 5 years as its population has grown by 17,392, an 0.8% increase. In comparison, over the past five years, the U.S. population grew by 0.7% and the County's population increased by 1.3%. As you will see in the chart below, the labor shed's population is projected to continue to grow:



- Very few labor markets in America draw from a population of more than 2 million people. The sheer size of the labor market gives Clay County a unique strength.
- The fastest growing counties within the Kansas City MSA are Clay County to the north and Platte County to the north due to the primary manufacturing plants being located mostly north of Kansas City meaning as population grows to the North of Kansas City, Clay County employers will continue to have access to workers.

- While Clay County has experienced rapid population growth, more than 85,100 people drive out of Clay County daily to work creating a pool of potential workers for new and expanding businesses.
- Clay County has 55% more people employed in manufacturing than the US average with 13,966 new manufacturing jobs having been created since 2015.
- Clay County's largest GDP contributor in 2020 was Manufacturing at \$2,721,004,000.
- Clay County has 133,349 people in its labor force and 108,915 jobs creating an excess labor pool of 24,434 people just within Clay County.
- Among company executives we interviewed in-person who had worked at other facilities in different parts of the USA, we were told the ability to hire and retain workers in Clay County is easier than most other locations where they have worked.
- Clay County's labor force participation rate of 70.1% is 6.9% higher than the USA average.

Next Move Group's consultants interviewed numerous companies, within various business sectors ranging from manufacturing to hospitality, within Clay County to understand both the strengths of the labor force and the geography from which people drive to their facilities in Clay County to work. Additionally, Next Move group reviewed U.S. Census data as well as data from Economic Modeling Specialists International to conduct the research associated with this report.

While Clay County is home to the following major employers: Ford Motor Company, Cerner Corporation, Hallmark Cards, Worlds Of Fun And Oceans Of Fun, Magna, Harrah's, Cook Composites & Polymers, Ameristar Casino, Wagner Logistics, and Regal Plastics Supply, 85,105 people are driving out of Clay County daily to work at other places of employment within our region creating a ready supply of labor of 85,105 people a new company could easily target for its workforce. Clay County has a very strong labor market to support General & Advanced Manufacturing, Entertainment & Recreation, Transportation & Warehousing, and Professional, Scientific, & Technical Services.

Next Move Group found a distinct difference in how employers rated their ability to attract workers based on an hourly rate of \$16/hour. Those above \$16/hour reported very few issues in attracting quality workers. Those below \$16/hour still had the ability to attract quality workers, but they reported it was tougher to do than those who paid more than \$16/hour. Next Move Group ran zip code data for various companies which pay both above and below the \$16/hour threshold to determine what the labor pool is for each:

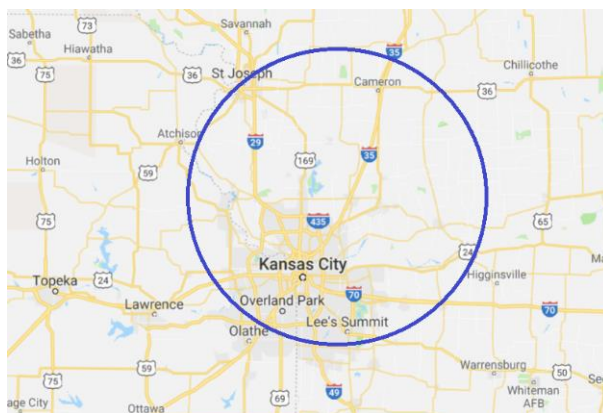
- For companies paying below \$16/hour they can expect:
  - Total population of this labor shed area is approximately 2,007,100 with a total workforce of 1,061,118

- Based on zip code data we received from various companies within Clay County, employers pull workers for below \$16/hour most often from a radius of Clay County plus 20 miles to the south and west of Clay County



*Employers paying \$16/hour and less can expect to draw labor from the region in red with a population of approximately 2 million people*

- For companies paying above \$16/hour they can expect:
  - Total population of the labor shed is approximately 2,374,671 with a total workforce of 1,262,620.
  - Based on zip code data we received from various companies within Clay County, employers pull workers for above \$16/hour most often from a radius of Clay County plus 30 miles to the north and east of Clay County and 20 miles to the south and west of Clay County.



*Employers paying \$16/hour + can expect to draw labor from the region in blue with a population of 2.3 million people.*

## Methodology

The following data sources were utilized to develop this study:

**Employer Interviews-** Major employers were interviewed in-person to determine current labor market satisfaction, trends, opportunities, and challenges.

**Employer Zip Code Data-** All major employers interviewed for this analysis were asked to provide zip code data for their existing workforce. This data helped us determine the labor draw area at various wages.

**JobsEQ by Chmura-** This data gave us 5-year growth patterns per occupational code, average wages per occupational code, and a baseline of how Clay County compares to US averages per occupational code.

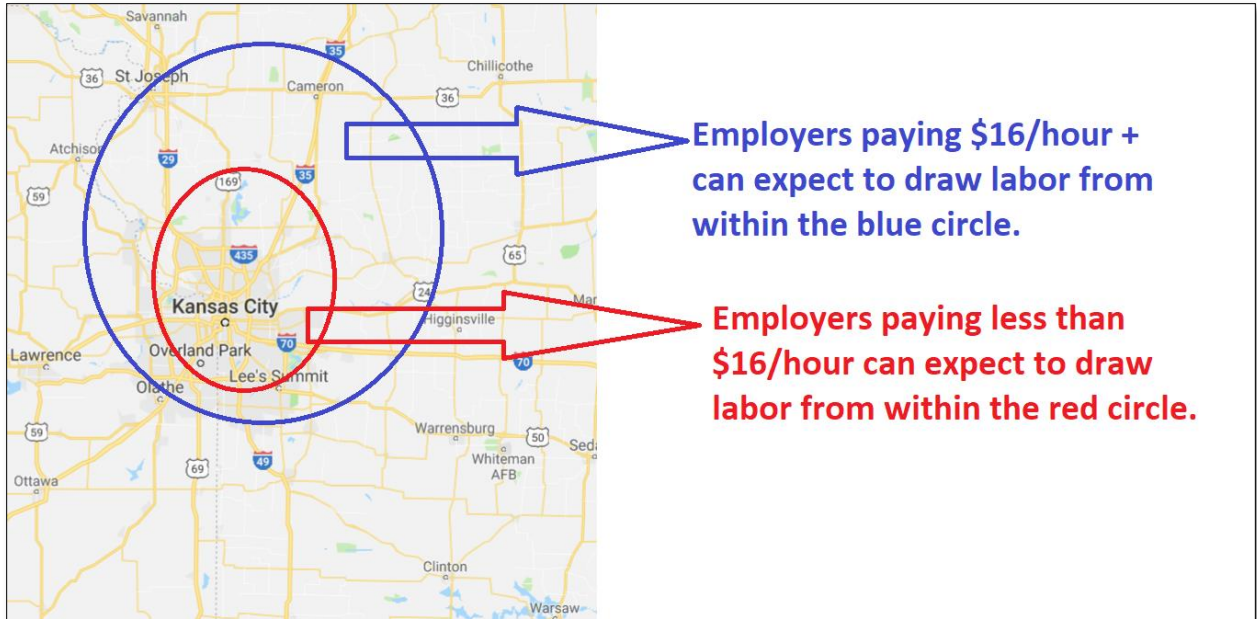
**US Census “On the Map” Data-** This data provided us information on the workers commuting out of Clay County daily to work and those commuting into Clay County daily to work.

**Employer Online Survey-** Employers were surveyed online to gauge satisfaction and opinions concerning the workforce via a 16-question online survey instrument.

## Labor Market Quantified

A review of U.S. Census Data, Economic Modeling Specialists International data, and interviews with employers were used to define the geographic area from which employers in Clay County can reasonably expect to draw employees. This labor shed was further defined to show a distinction between the labor pool for workers paid both above and below \$16/hour.

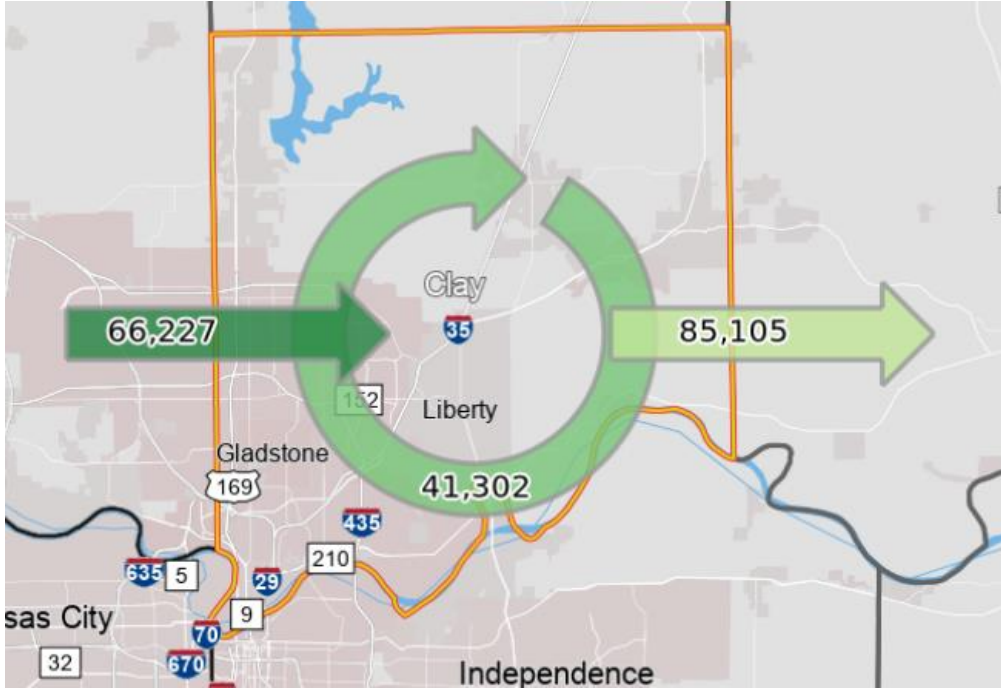
In interviewing businesses and reviewing the zip code data of their workforce, Next Move Group found that companies which offered wages above \$16/hours were typically more likely to pull workers from a larger geographic area. For example, the total population of the below \$16/hour labor shed was approximately 1,975,350. In comparison, total population of the labor shed when adjusting for above \$16/hour is 2,374,671, roughly 399,000 more people.



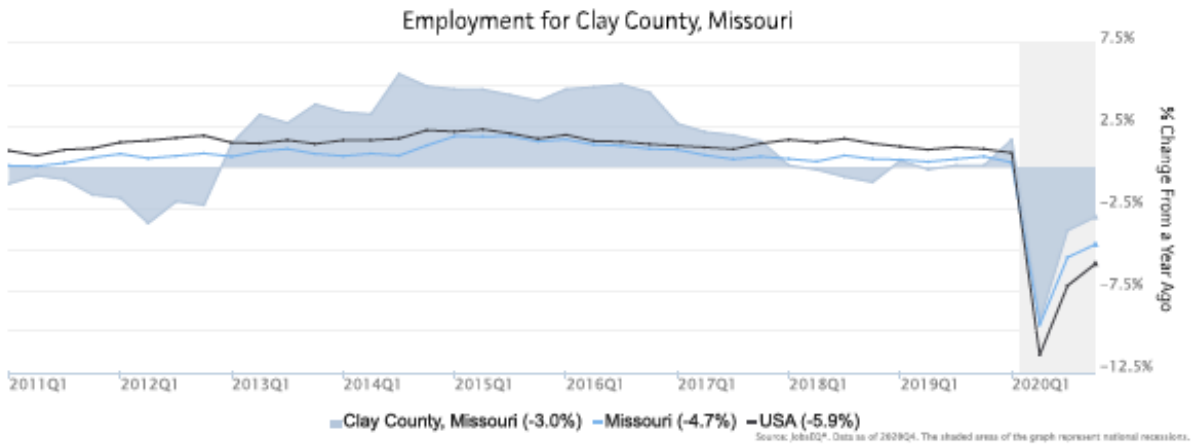
*Note, while employers paying less than \$16/hour will pull from a smaller radius, the population within this radius is still 2.1 million people making it a very strong labor shed area even for the lower paying companies*

In addition to Clay County, labor was primarily pulled from the counties of Jackson County, Missouri, and Johnson County, Kansas. Of the regional labor shed population of over 2.3 million people, 242,516 reside in Clay County.

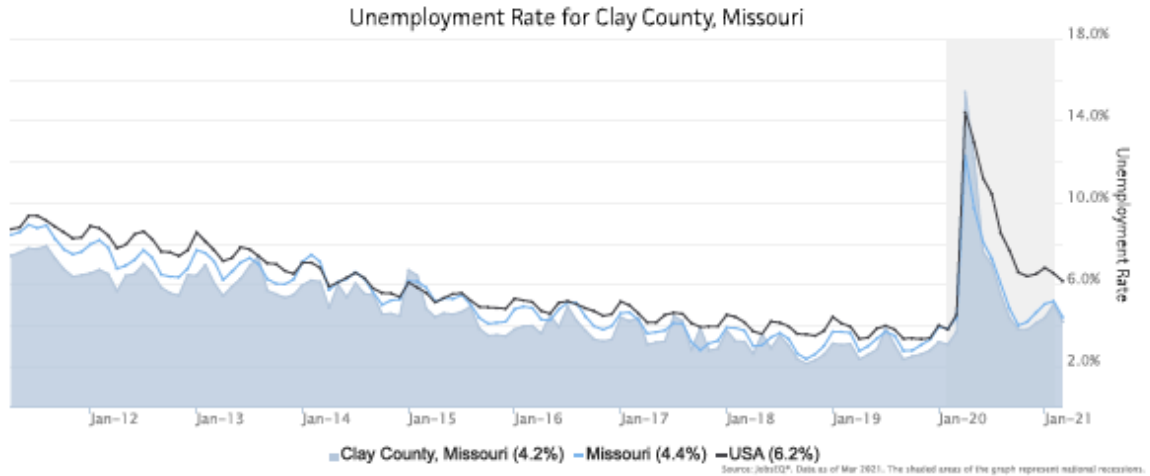
Clay County is a net exporter of workers, meaning new and expanding companies in Clay County have a very good opportunity to attract good workers from people currently living in Clay County who are leaving the county to work. As the map below indicates 85,105 people who live in Clay County leave the County to work on a daily basis. 66,227 people drive into Clay County from outside the county to work on a daily basis and 41,302 people who live in Clay County also work in Clay County. 13,900 more people are leaving Clay County each day to work than are driving into the county to work creating a strong labor pool for employers within Clay County.



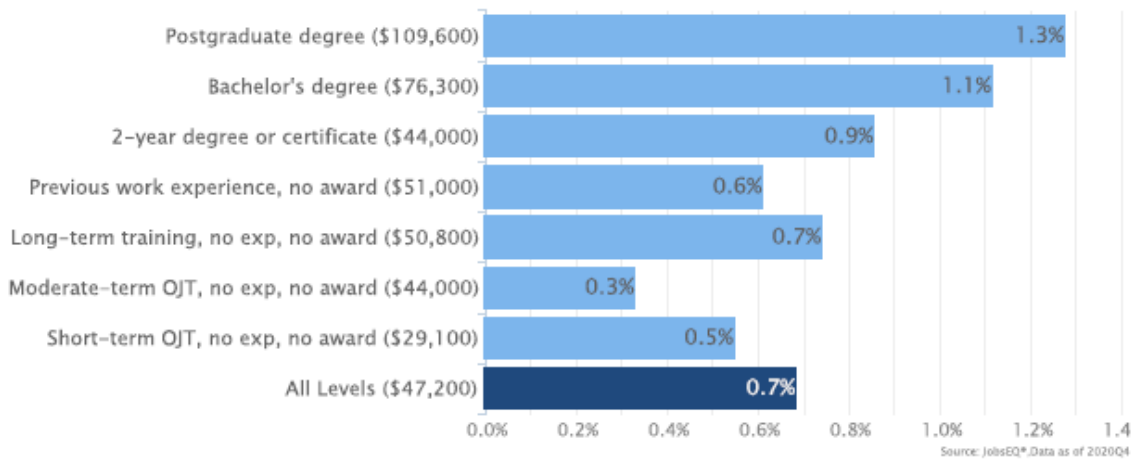
Here is a breakdown of employment within Clay County itself:



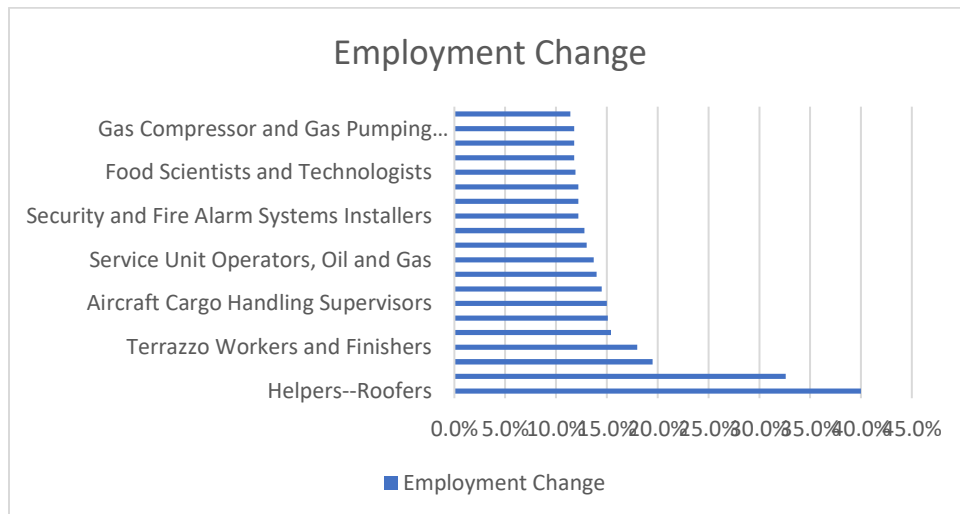




### Annual Average Projected Job Growth by Training Required for Clay County, Missouri



*These are just a few of the occupations that have grown in Clay County, Missouri:*



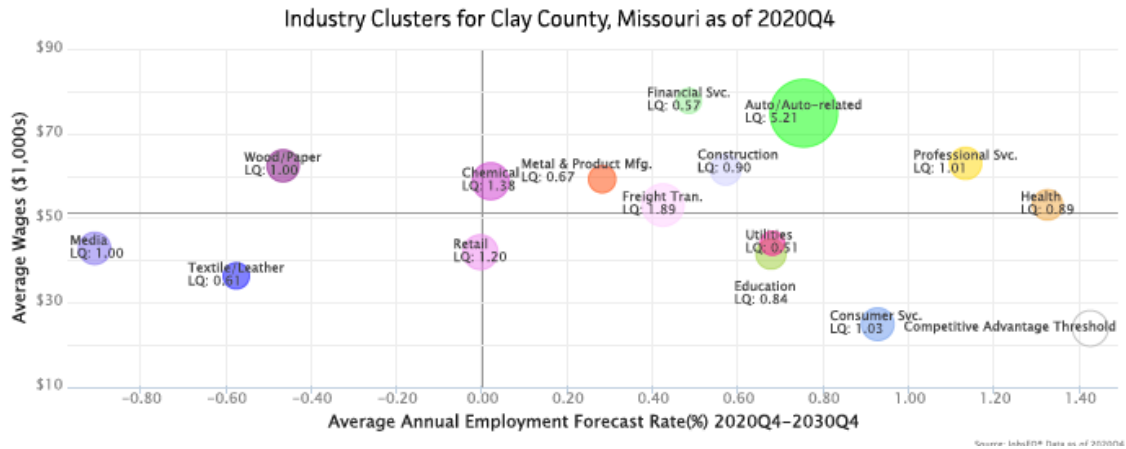
*Industry Snapshot of the Top 10 Industries by employment change in Clay County:*

Industry	Current			5-Year History	
	Employed	Avg Ann Wages	LQ	Employment Change	Avg % Change
General Medical and Surgical Hospitals	59,088	\$66,581	1.25	10,930	4.2%
General Warehousing and Storage	14,892	\$38,688	1.41	8,199	17.3%
Computer Systems Design Services	19,088	\$99,744	2.25	4,260	5.2%
Administrative Management and General Management Consulting Services	7,871	\$77,928	1.27	3,928	14.8%
Radio and Television Broadcasting and Wireless Communications Equipment Manufacturing	3,896	\$77,885	9.65	3,175	40.1%
Couriers and Express Delivery Services	8,947	\$39,742	1.30	2,765	7.7%
Services for the Elderly and Persons with Disabilities	14,127	\$17,124	0.88	2,668	4.3%
Custom Computer Programming Services	10,401	\$85,768	1.30	1,775	3.8%
Home Centers	6,750	\$29,029	1.11	1,730	6.1%
Commercial and Institutional Building Construction	6,444	\$81,735	1.16	1,463	5.3%

*Clay County's Labor Force Participation Rate Trends About **7% Above the US Average** Labor Force Participation Rate of 63.2% making this truly one of the best labor advantages of Clay County:*

Timeframe	Labor Force Participation Rate
2014	70.17%
2015	70.80%
2016	70.65%
2017	69.67%
2018	68.44%
January - July 2019	67.90%
August 2019	69.47%
September 2019	69.40%
October 2019	69.66%

### Industry Cluster in Clay County

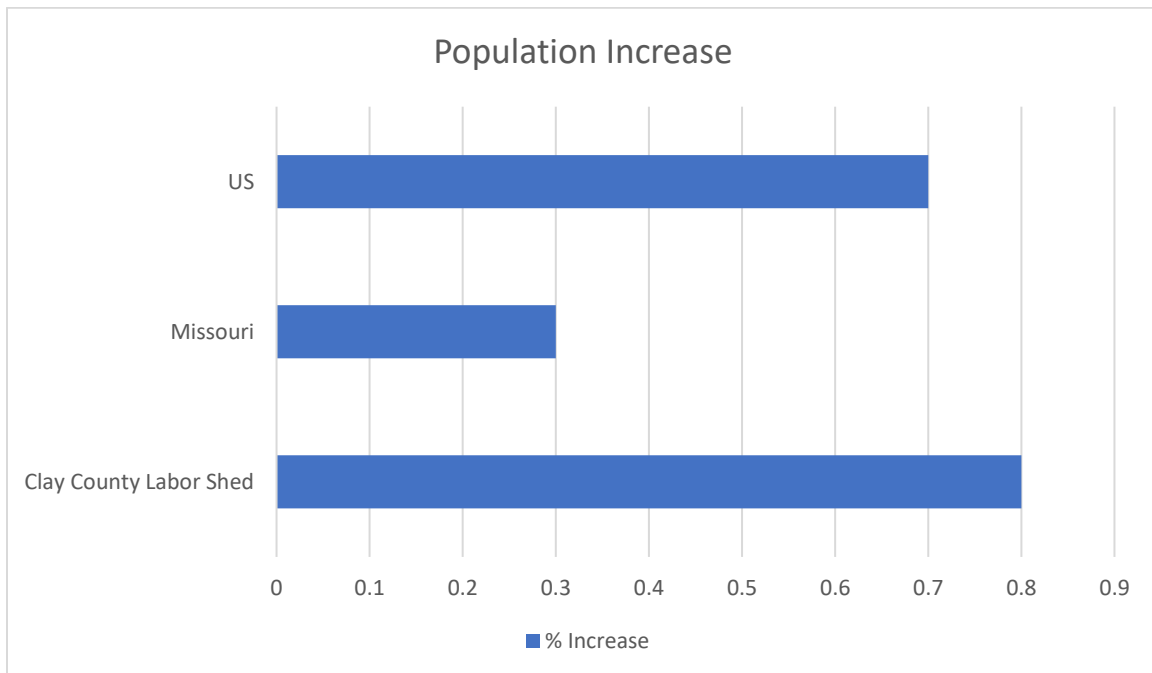


## Cost of Living

The Clay County labor shed area's cost of living is 94.8, 5% below the USA average. This is lower than the average cost of living means that wages go further in Clay County than the national average.

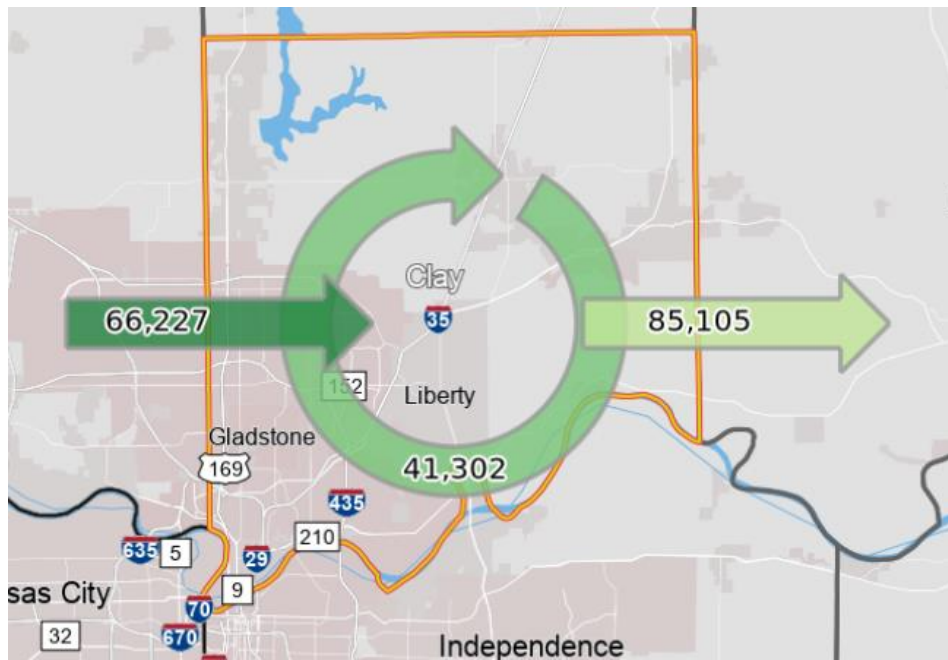
## Population Growth

Clay County's labor shed has experienced steady population growth over the last five years. Population has grown by 0.8% since 2015. In comparison, over the past five years, the U.S. population grew by 0.7%, Missouri's population increased by 0.3%, and Clay County's population increased by 1.3%.

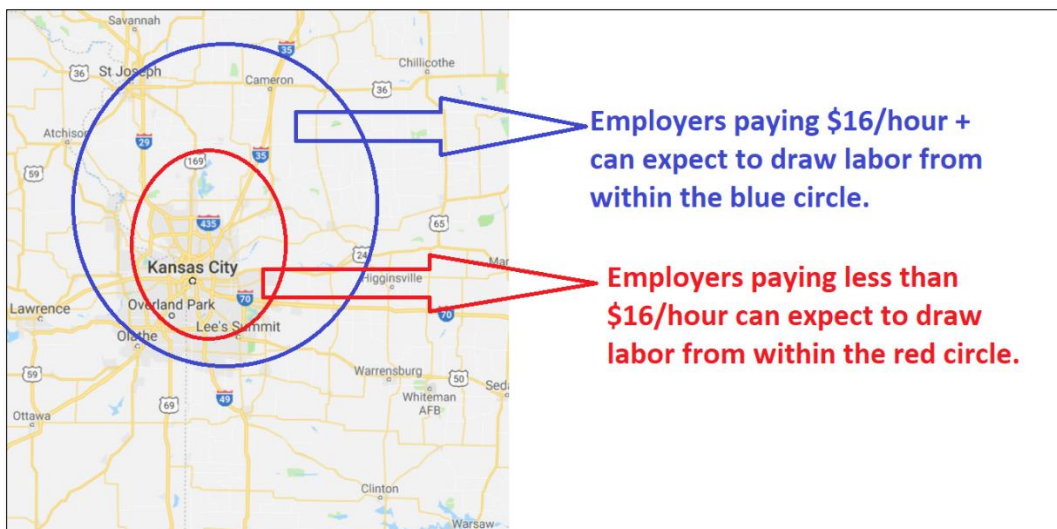


## Commuting Patterns

According to the US Census Bureau, the average travel time for people who work in Clay County to travel to and from their jobs is 22 minutes. Among primary occupations, Clay County is attracting over 66,227 workers from outside the County into the County to work. Additionally, the County is retaining over 41,302 workers within the County. However, over 85,105 workers are travelling outside of the County to work.



*U.S. Census Data showing the number of people traveling into Clay County to work and the number of people traveling out of Clay County to work.*



## Educational Attainment in Clay County

Educational attainment within the County is a strength in comparison to the state and national averages. A total of 93.8% of the working age population has a high school diploma or higher. In Clay County, 24.6% of residents possess a bachelor's degree, which is 5.9% above the state average and 3.4% above the national average. Additionally, 9.3% hold an associate degree which is also slightly above the state and national average.

## Challenges Companies Face in the Workforce

When asked what challenges their company currently faced in Clay County, a few company stakeholders mentioned that finding industrial maintenance people is a challenge. The most common workforce challenge companies mentioned to us was that it is hard to find skilled trades people in general.

Additionally, a company mentioned the need for public transportation to their plant which coincides with their 3 shift-change times.

Several companies mentioned they have had some challenges with applicants not passing drug tests.

## Observations from In-Person Interviews of Local Employers

Among company executives we interviewed in-person who had worked at other facilities in different parts of the USA, we were told the ability to hire and retain workers in Clay County is easier than most other locations where they have worked.

It is common practice in Clay County to hire employees on a 3-month temp to hire basis.

## Primary Occupation Classifications

A review of Standard Occupational Classifications (SOC) codes is useful to identify the experienced pools of workers within the Clay County labor shed. The SOC is a federal statistical standard which classifies occupations based on worker training and skill sets. If a worker can be classified in two separate occupations, he or she is classified in the one which requires the most advanced skills and training. It is based on the work performed and covers all work that is performed for pay.

The codes themselves are grouped into categories based on industry type. Beyond that into broad categories, and from there into more specific categories. A comparison of SOC codes may give indications of skill sets and training which could be transferrable from one occupation to a different one.

The Location Quotient (LQ) is a comparative measurement that compares the number or percentage of workers in a specific occupation within the labor shed to the national average for concentration of those workers in the national workforce. Nationwide, the LQ of any occupation is 1. An LQ of 10 for a particular occupation within a specific labor shed means that there are 10 times as many of that kind of worker as the national average.

Location quotients for Clay County occupations which are higher than twice the national average are listed below.

<b>Occupation</b>	<b>LQ</b>
Locomotive Engineers	7.29
Railroad Brake, Signal, and Switch Operators and Locomotive Firers	6.72
Rail Yard Engineers, Dinkey Operators, and Hostlers	6.49
Railroad Conductors and Yardmasters	5.84
Rail Transportation Workers, All Other	5.81
Team Assemblers	5.60
Rail Car Repairers	5.30
Gambling Change Persons and Booth Cashiers	5.01
Print Binding and Finishing Workers	4.57
Terrazzo Workers and Finishers	4.40
Gambling Surveillance Officers and Gambling Investigators	4.24
Gambling Dealers	4.17
Gambling Cage Workers	4.16
Assemblers and Fabricators, All Other	3.89
Signal and Track Switch Repairers	3.79

Paper Goods Machine Setters, Operators, and Tenders	3.76
Prepress Technicians and Workers	3.55
Multiple Machine Tool Setters, Operators, and Tenders, Metal and Plastic	3.46
Gambling Service Workers, All Other	3.24
Locksmiths and Safe Repairers	3.22
Printing Press Operators	3.18
Rail-Track Laying and Maintenance Equipment Operators	3.13
Gambling Managers	3.10
Electronic Equipment Installers and Repairers, Motor Vehicles	2.99
Gambling and Sports Book Writers and Runners	2.91
Locker Room, Coatroom, and Dressing Room Attendants	2.74
Family Medicine Physicians	2.73
First-Line Supervisors of Gambling Services Workers	2.54
Coating, Painting, and Spraying Machine Setters, Operators, and Tenders	2.40
Coin, Vending, and Amusement Machine Servicers and Repairers	2.30
Metal Workers and Plastic Workers, All Other	2.26
Security and Fire Alarm Systems Installers	2.18
Electrical and Electronics Installers and Repairers, Transportation Equipment	2.17
Welding, Soldering, and Brazing Machine Setters, Operators, and Tenders	2.12



Occupations which have grown within the Clay County labor shed over the past five years span a wide variety of types of business and industry. To highlight growth among major occupations in the labor shed the following shows 100+ job occupations that have shown at least 20% growth.

<b>Description</b>	<b>2015 Jobs</b>	<b>2020 Jobs</b>	<b>Change</b>
Data Scientists and Mathematical Science Occupations, All Other	168	256	52%
Marriage and Family Therapists	150	220	47%
Electrical, Electronic, and Electromechanical Assemblers, Except Coil Winders, Tapers, and Finishers	2022	2958	46%
Ophthalmic Medical Technicians	304	432	42%
Elevator and Escalator Installers and Repairers	226	320	42%
Financial Examiners	472	666	41%
Personal Care Aides	11327	15577	38%
Mechanical Door Repairers	198	270	36%
Exercise Physiologists	91	124	36%
Semiconductor Processing Technicians	278	371	33%
Food Batchmakers	911	1213	33%
Information Security Analysts	948	1259	33%
Pest Control Workers	456	600	32%
Food Science Technicians	101	132	31%
Market Research Analysts and Marketing Specialists	4344	5649	30%
Riggers	77	100	30%
Occupational Health and Safety Technicians	136	176	29%
Agricultural Equipment Operators	225	291	29%
Funeral Home Managers	104	133	28%
Therapists, All Other	120	153	28%
Occupational Health and Safety Specialists	539	685	27%
Human Resources Managers	780	991	27%
Community Health Workers	326	412	26%
Multiple Machine Tool Setters, Operators, and Tenders, Metal and Plastic	1092	1379	26%
Radio, Cellular, and Tower Equipment Installers and Repairers	99	125	26%
Statisticians	225	284	26%
Logisticians	1108	1391	26%
Merchandise Displayers and Window Trimmers	1037	1301	25%

Separating, Filtering, Clarifying, Precipitating, and Still Machine Setters, Operators, and Tenders	270	337	25%
Economists	110	137	25%
Nurse Practitioners	1606	1997	24%
Residential Advisors	407	506	24%
Industrial Truck and Tractor Operators	5019	6238	24%
Computer Numerically Controlled Tool Programmers	163	201	23%
Respiratory Therapists	932	1149	23%
Tree Trimmers and Pruners	400	493	23%
Diagnostic Medical Sonographers	535	657	23%
Medical Equipment Preparers	392	478	22%
Fence Erectors	244	297	22%
Food and Tobacco Roasting, Baking, and Drying Machine Operators and Tenders	143	174	22%
Phlebotomists	1196	1454	22%
Farm Equipment Mechanics and Service Technicians	309	375	21%
Biochemists and Biophysicists	153	185	21%
Industrial Engineers	1825	2190	20%
Chemical Equipment Operators and Tenders	877	1050	20%
Surgical Technologists	737	881	20%
Software Developers and Software Quality Assurance Analysts and Testers	10490	12538	20%

Another frequently cited occupational characteristic of the labor force is prevailing wage. As might be expected, many of the top occupations earning the highest average pay are within the healthcare field. Other occupations with above-average wages include business services and education.

The top 20 paid occupations once healthcare, business services, and education are removed, are:

<b>Occupation</b>	<b>Mean Annual Wages</b>
Airline Pilots, Copilots, and Flight Engineers	\$173,600
Petroleum Engineers	\$139,900
Architectural and Engineering Managers	\$132,100

Compensation and Benefits Managers	\$130,600
Computer and Information Systems Managers	\$129,800
Natural Sciences Managers	\$128,600
Administrative Law Judges, Adjudicators, and Hearing Officers	\$124,400
Computer and Information Research Scientists	\$124,300
Air Traffic Controllers	\$122,900
Human Resources Managers	\$118,900
Education Administrators, Postsecondary	\$118,700
Lawyers	\$118,100
Actuaries	\$116,900
Purchasing Managers	\$116,500
Judges, Magistrate Judges, and Magistrates	\$115,600
Training and Development Managers	\$114,100
Industrial Production Managers	\$111,100
Public Relations Managers	\$110,900
Fundraising Managers	\$110,300

## Top Employer Classifications

Located below is a list of the top industries within Clay County who employ over 1,000 people. The top five industries include Light Truck and Utility Vehicle Manufacturing, Elementary and Secondary Schools, General Medical and Surgical Hospitals, Temporary Help Services, and Limited-Service Restaurants.

Industry	Employees
Light Truck and Utility Vehicle Manufacturing	6,999
Elementary and Secondary Schools	5,938
General Medical and Surgical Hospitals	5,156
Temporary Help Services	4,028
Limited-Service Restaurants	3,964
Computer Systems Design Services	3,819
Full-Service Restaurants	3,395
Offices of Physicians (except Mental Health Specialists)	2,444
Supermarkets and Other Grocery (except Convenience) Stores	2,346
Religious Organizations	2,101
Warehouse Clubs and Supercenters	2,000
Couriers and Express Delivery Services	1,512
Stationery and Office Supplies Merchant Wholesalers	1,239
General Freight Trucking, Long-Distance, Truckload	1,169

The location quotient for an industry is a measure based on the prevalence of an industry within a specific area as compared to the prevalence of that industry nationwide. The national location quotient for any industry is 1. Location quotients for Clay County industries which are higher than twice the national average are listed below.

Description	Location Quotient
Light Truck and Utility Vehicle Manufacturing	147.56
Stationery and Office Supplies Merchant Wholesalers	38.13
Books Printing	20.67
Other Metal Valve and Pipe Fitting Manufacturing	20.12
Dry Pasta, Dough, and Flour Mixes Manufacturing from Purchased Flour	15.93

Ice Manufacturing	15.85
Wet Corn Milling	14.55
Printing Ink Manufacturing	13.73
Tire Retreading	11.66
Support Activities for Rail Transportation	11.30
Commercial Air, Rail, and Water Transportation Equipment Rental and Leasing	11.01
Rubber and Plastics Hoses and Belting Manufacturing	10.21
Automobile and Other Motor Vehicle Merchant Wholesalers	9.03
Casinos (except Casino Hotels)	7.10
Corrugated and Solid Fiber Box Manufacturing	6.76
Other Nonresidential Building Finishing Contractors	6.73
Rail Transportation (non-covered)	6.64
Motor Vehicle Seating and Interior Trim Manufacturing	6.47
Dry Pea and Bean Farming	6.30
Truck, Utility Trailer, and RV (Recreational Vehicle) Rental and Leasing	6.24
Paint and Coating Manufacturing	6.20
Amusement and Theme Parks	6.13
Pesticide and Other Agricultural Chemical Manufacturing	5.75
Farm Product Warehousing and Storage	5.13
Iron and Steel Pipe and Tube Manufacturing from Purchased Steel	5.09
Offices of Physicians, Mental Health Specialists	4.94
Computer Systems Design Services	4.89
Packaging Machinery Manufacturing	4.76
All Other Miscellaneous Textile Product Mills	4.58
Fresh Fruit and Vegetable Merchant Wholesalers	4.49
Crushed and Broken Limestone Mining and Quarrying	4.48
Other Farm Product Raw Material Merchant Wholesalers	4.43
Pipeline Transportation of Refined Petroleum Products	4.40
Automobile Manufacturing	4.27
Other Electronic and Precision Equipment Repair and Maintenance	3.95
Other Business Service Centers (including Copy Shops)	3.86
Security Systems Services (except Locksmiths)	3.71
Commercial Printing (except Screen and Books)	3.70
Polish and Other Sanitation Good Manufacturing	3.70
Tire and Tube Merchant Wholesalers	3.68
Motor Vehicle Body Manufacturing	3.66
Advertising Agencies	3.61
Stationery Product Manufacturing	3.55
Other Waste Collection	3.44
Casino Hotels	3.40
Metal Window and Door Manufacturing	3.37

Other Building Material Dealers	3.24
Plastics Materials and Basic Forms and Shapes Merchant Wholesalers	2.97
All Other Miscellaneous Chemical Product and Preparation Manufacturing	2.82
All Other Amusement and Recreation Industries	2.76
Wine and Distilled Alcoholic Beverage Merchant Wholesalers	2.75
General Freight Trucking, Long-Distance, Truckload	2.69
Lumber, Plywood, Millwork, and Wood Panel Merchant Wholesalers	2.67
General Freight Trucking, Long-Distance, Less Than Truckload	2.66
Sawmill, Woodworking, and Paper Machinery Manufacturing	2.59
Paint, Varnish, and Supplies Merchant Wholesalers	2.53
Industrial and Personal Service Paper Merchant Wholesalers	2.49
Plastics Bottle Manufacturing	2.49
Specialized Freight (except Used Goods) Trucking, Long-Distance	2.46
Motor Vehicle Supplies and New Parts Merchant Wholesalers	2.45
Automotive Exhaust System Repair	2.45
Power and Communication Line and Related Structures Construction	2.41
Scenic and Sightseeing Transportation, Land	2.41
Couriers and Express Delivery Services	2.39
Carpet and Upholstery Cleaning Services	2.39
Custom Compounding of Purchased Resins	2.38
Other Metal Container Manufacturing	2.37
Polystyrene Foam Product Manufacturing	2.36
Water and Sewer Line and Related Structures Construction	2.26
Freight Transportation Arrangement	2.22
Offices of Podiatrists	2.22
Institutional Furniture Manufacturing	2.21
Commercial Screen Printing	2.20
Oil and Gas Pipeline and Related Structures Construction	2.19
Fabricated Structural Metal Manufacturing	2.18
Industrial Gas Manufacturing	2.18
Temporary Help Services	2.17
Locksmiths	2.16
Residential Poured Concrete Foundation and Structure Contractors	2.09
All Other Insurance Related Activities	2.08
Hazardous Waste Treatment and Disposal	2.05
Asphalt Paving Mixture and Block Manufacturing	2.05
Nonresidential Roofing Contractors	2.04
Vending Machine Operators	2.03
Libraries and Archives	2.00

## High Risk Industry Sectors

Now that high location quotient industries within Clay County have been identified, it is important to highlight those industry sectors that should be classified as being at risk. These industries have a higher concentration within Clay County than the national average, however, over the past 5 years their employment numbers have decreased or stayed the same. This loss in employment is a threat to the current advantage that Clay County has in these industry sectors. Located below are industries that could currently be classified as high-risk in Clay County.

Description	2020 Jobs	5 Year % Change	2020 LQ
Light Truck and Utility Vehicle Manufacturing	6999	-8%	147.56
Dry Pasta, Dough, and Flour Mixes Manufacturing from Purchased Flour	236	-14%	15.93
Printing Ink Manufacturing	74	-27%	13.73
Tire Retreading	53	-15%	11.66
Rubber and Plastics Hoses and Belting Manufacturing	159	-1%	10.21
Automobile and Other Motor Vehicle Merchant Wholesalers	809	-8%	9.03
Casinos (except Casino Hotels)	709	-22%	7.1
Rail Transportation (non-covered)	725	-26%	6.64
Motor Vehicle Seating and Interior Trim Manufacturing	327	-24%	6.47
Paint and Coating Manufacturing	190	-5%	6.2
Amusement and Theme Parks	512	-56%	6.13
Iron and Steel Pipe and Tube Manufacturing from Purchased Steel	92	-14%	5.09
Computer Systems Design Services	3819	-16%	4.89
Packaging Machinery Manufacturing	76	-13%	4.76
All Other Miscellaneous Textile Product Mills	97	-38%	4.58
Other Electronic and Precision Equipment Repair and Maintenance	112	-22%	3.95
Polish and Other Sanitation Good Manufacturing	67	-73%	3.7
Commercial Printing (except Screen and Books)	777	-14%	3.7
Stationery Product Manufacturing	39	-36%	3.55
Casino Hotels	645	-40%	3.4
Other Building Material Dealers	549	-12%	3.24
Plastics Materials and Basic Forms and Shapes Merchant Wholesalers	60	-9%	2.97
All Other Miscellaneous Chemical Product and Preparation Manufacturing	80	-27%	2.82
Wine and Distilled Alcoholic Beverage Merchant Wholesalers	176	-17%	2.75

Paint, Varnish, and Supplies Merchant Wholesalers	41	-11%	2.53
Plastics Bottle Manufacturing	62	-30%	2.49
Specialized Freight (except Used Goods) Trucking, Long-Distance	241	-25%	2.46
Carpet and Upholstery Cleaning Services	82	-10%	2.39
Freight Transportation Arrangement	414	-16%	2.22
Institutional Furniture Manufacturing	37	-10%	2.21
Commercial Screen Printing	114	-36%	2.2
All Other Insurance Related Activities	148	-18%	2.08
Libraries and Archives	226	-13%	2
Vocational Rehabilitation Services	438	-4%	1.98
Coin-Operated Laundries and Drycleaners	52	-20%	1.97
Frozen Fruit, Juice, and Vegetable Manufacturing	40	-15%	1.87
Other Support Activities for Road Transportation	77	-50%	1.81
Plastics Material and Resin Manufacturing	74	-9%	1.74
Hardware Merchant Wholesalers	104	-1%	1.67
RV (Recreational Vehicle) Parks and Campgrounds	39	-32%	1.61
Car Washes	194	-6%	1.59
Administration of Veterans' Affairs	85	-11%	1.57
Hobby, Toy, and Game Stores	115	-32%	1.5
Used Merchandise Stores	172	-3%	1.39
Cut Stone and Stone Product Manufacturing	33	-15%	1.37
Other Construction Material Merchant Wholesalers	31	-52%	1.36
Administration of Housing Programs	60	-6%	1.32
General Automotive Repair	377	-5%	1.32
Other Chemical and Allied Products Merchant Wholesalers	110	-4%	1.31
Temporary Shelters	74	-3%	1.31
Bowling Centers	44	-41%	1.3
Perishable Prepared Food Manufacturing	56	-22%	1.3
Offices of Chiropractors	135	-1%	1.3
Wholesale Trade Agents and Brokers	451	-25%	1.29
Hardware Stores	147	-4%	1.28
Police Protection	612	-2%	1.26
Supermarkets and Other Grocery (except Convenience) Stores	2346	-3%	1.25
Industrial Machinery and Equipment Merchant Wholesalers	279	-9%	1.22
All Other Residential Specialty Trade Contractors	258	-13%	1.21
Consumer Lending	87	-37%	1.19
Flower, Nursery Stock, and Florists' Supplies Merchant Wholesalers	38	-22%	1.14



Full-Service Restaurants	3395	-7%	1.14
Photography Studios, Portrait	54	-40%	1.13
Offices of Dentists	731	-5%	1.11
Paper (except Newsprint) Mills	40	-17%	1.08
Administration of Public Health Programs	210	-11%	1.08
Child Day Care Services	791	-18%	1.07
Sporting and Recreational Goods and Supplies Merchant Wholesalers	48	-6%	1.07
Department Stores	695	-8%	1.05
Elementary and Secondary Schools	5938	-2%	1.05
Floor Covering Stores	54	-26%	1.04
Residential Electrical Contractors and Other Wiring Installation Contractors	270	-11%	1.01

## High Growth Potential Sectors

There are also industry sectors within Clay County that should be identified as having high growth potential. These are sectors that do not have a high concentration within Clay County but have shown notable growth over the last 5 years. These sectors have increased in employment and present an opportunity for Clay County to encourage their continued growth. Located below are industries that could currently be classified as having high growth potential in Clay County.

Description	2020 Jobs	5 Year % Change	2020 LQ
Construction, Mining, and Forestry Machinery and Equipment Rental and Leasing	37	270%	0.65
Other Miscellaneous Durable Goods Merchant Wholesalers	39	225%	0.56
Human Resources Consulting Services	61	221%	0.9
Sales Financing	33	175%	0.5
Sporting and Athletic Goods Manufacturing	30	173%	0.93
Farm and Garden Machinery and Equipment Merchant Wholesalers	38	171%	0.5
Other Airport Operations	33	154%	0.4
Facilities Support Services	30	150%	0.24
Beer, Wine, and Liquor Stores	54	125%	0.43
Engineering Services	594	123%	0.75
All Other Outpatient Care Centers	78	123%	0.49
Urethane and Other Foam Product (except Polystyrene) Manufacturing	26	117%	0.99
Limousine Service	145	116%	0.97
Taxi Service	80	116%	0.76

All Other Miscellaneous Schools and Instruction	52	108%	0.87
Software Publishers	33	83%	0.09
Residential Roofing Contractors	74	80%	0.75
Barber Shops	28	75%	0.68
Direct Title Insurance Carriers	21	75%	0.45
Periodical Publishers	21	75%	0.38
Nonresidential Drywall and Insulation Contractors	43	65%	0.42
Grain and Field Bean Merchant Wholesalers	31	63%	0.99
Nonresidential Site Preparation Contractors	165	62%	0.93
Private Households	53	61%	0.33
Snack and Nonalcoholic Beverage Bars	358	61%	0.7
Dental Laboratories	24	60%	0.79
Residential Tile and Terrazzo Contractors	43	59%	0.84
Pet Care (except Veterinary) Services	68	58%	0.63
Motion Picture and Video Production	73	55%	0.48
Specialized Freight (except Used Goods) Trucking, Local	62	55%	0.37
Claims Adjusting	33	50%	0.62
Interior Design Services	33	50%	0.61
Other Vegetable (except Potato) and Melon Farming	28	47%	0.54
All Other Miscellaneous Store Retailers (except Tobacco Stores)	103	47%	0.79
All Other Specialty Food Stores	25	47%	0.5
Home Furnishing Merchant Wholesalers	23	44%	0.52
General Freight Trucking, Local	156	42%	0.67
All Other Home Furnishings Stores	91	40%	0.9
Graphic Design Services	40	38%	0.62
Residential Plumbing, Heating, and Air-Conditioning Contractors	385	37%	0.83
Sewage Treatment Facilities	26	37%	0.59
Drugs and Druggists' Sundries Merchant Wholesalers	93	37%	0.55
Residential Masonry Contractors	62	35%	0.86
Administrative Management and General Management Consulting Services	175	35%	0.31
Convention and Trade Show Organizers	24	33%	0.68
Services for the Elderly and Persons with Disabilities	896	33%	0.61
Local Messengers and Local Delivery	57	33%	0.45
Nonresidential Electrical Contractors and Other Wiring Installation Contractors	428	32%	0.91

All Other Health and Personal Care Stores	46	31%	0.91
Exterminating and Pest Control Services	31	29%	0.31
Commercial and Institutional Building Construction	326	29%	0.64
Diagnostic Imaging Centers	32	28%	0.58
Lessors of Nonresidential Buildings (except Miniwarehouses)	51	28%	0.48
Community Food Services	24	26%	0.83
Regulation, Licensing, and Inspection of Miscellaneous Commercial Sectors	35	25%	0.5
Specialty (except Psychiatric and Substance Abuse) Hospitals	78	24%	0.4
Fruit and Vegetable Canning	28	22%	0.67
Security Guards and Patrol Services	175	22%	0.34
Regulation and Administration of Transportation Programs	63	21%	0.28
Offices of Real Estate Agents and Brokers	339	21%	0.81
Surgical Appliance and Supplies Manufacturing	72	16%	0.95
Other Activities Related to Real Estate	67	16%	0.57
Residential Siding Contractors	31	15%	0.9
All Other Professional, Scientific, and Technical Services	196	15%	0.66
Janitorial Services	908	13%	0.94
New Single-Family Housing Construction (except For-Sale Builders)	191	12%	0.58
Motorcycle, ATV, and All Other Motor Vehicle Dealers	28	12%	0.53
Residential Painting and Wall Covering Contractors	162	12%	0.97
Postharvest Crop Activities (except Cotton Ginning)	50	11%	0.78
Residential Flooring Contractors	56	10%	0.78
Assisted Living Facilities for the Elderly	226	10%	0.68
Private Mail Centers	23	10%	0.9
Employment Placement Agencies	23	10%	0.14
Translation and Interpretation Services	24	9%	0.57
Landscaping Services	501	9%	0.72
Independent Artists, Writers, and Performers	139	9%	0.64
Shoe Stores	65	8%	0.6
Crop Production (Proprietors)	109	8%	0.53
Convenience Stores	29	7%	0.24
Other Justice, Public Order, and Safety Activities	118	7%	0.91

Other Spectator Sports	45	7%	0.98
Residential Property Managers	334	6%	0.91
Electronic Shopping and Mail-Order Houses	202	6%	0.59
Legal Counsel and Prosecution	58	5%	0.7
Other Individual and Family Services	58	5%	0.14
Drinking Places (Alcoholic Beverages)	106	5%	0.52
Residential Remodelers	309	4%	0.73
Water Supply and Irrigation Systems	72	4%	0.63
Professional and Management Development Training	24	4%	0.48
Sports and Recreation Instruction	98	4%	0.85
Surveying and Mapping (except Geophysical) Services	25	4%	0.64
Other Gasoline Stations	54	4%	0.8
Educational Support Services	31	3%	0.2
Caterers	98	3%	0.98
Commercial Banking	706	3%	0.7
Labor Unions and Similar Labor Organizations	55	2%	0.73
Tire Dealers	128	1%	0.97

## Workforce Training/Talent Pipeline

The Clay County labor shed is served by the following institutions of higher education, ranging from general education to technical training institutions to seminaries. Institutions included in the list are those that are located within the labor shed.

Donnelly College
Kansas City Kansas Community College Technical Education Center
Concorde Career College-Kansas City
Kansas City Kansas Community College
House of Heavilin Beauty College-Blue Springs
DeVry University-Missouri
Graceland University
Independence College of Cosmetology
Kansas City Art Institute
Metropolitan Community College-Kansas City
Metropolitan Community College-Maple Woods
Metropolitan Community College-Kansas City
Midwestern Baptist Theological Seminary
University of Missouri-Kansas City
Nazarene Theological Seminary
Park University
Metropolitan Community College-Penn Valley

Rockhurst University
Saint Luke's College of Health Sciences
Truman Medical Center School of Nurse Anesthesia
Kansas City University of Medicine and Biosciences
William Jewell College
National American University-Independence
Paris II Educational Center
DeVry University's Keller Graduate School of Management-Missouri
Xenon International Academy-Kansas City
Excelsior Springs Area Career Center
Vatterott College-Kansas City
Colorado Technical University-Kansas City
Herndon Career Center
Metropolitan Community College-Blue River
Kansas City College
Aviation Institute of Maintenance-Kansas City
University of Phoenix-Kansas City Campus
Heritage College-Kansas City
ITT Technical Institute-Kansas City
National American University-Zona Rosa
Pinnacle Career Institute-North Kansas City
City Vision University
Transformed Barber and Cosmetology Academy
Academy of Aesthetic Arts
National American University-Lee's Summit
Donna's Academy of Hair Design
Strayer University-Missouri
DeVry University-Missouri
Ea La Mar's Cosmetology & Barber College
Columbia College - Kansas City

Located below are programs with at least 100 completions within the labor shed.

<b>Title</b>	<b>Total Awards</b>
Liberal Arts and Sciences/Liberal Studies	4,600
Business Administration and Management, General	2,690

Registered Nursing/Registered Nurse	1,933
Nursing Assistant/Aide and Patient Care Assistant/Aide	862
Criminal Justice/Law Enforcement Administration	780
Business/Commerce, General	743
Accounting	568
Psychology, General	563
Biology/Biological Sciences, General	546
Computer Science	483
Pharmacy	404
Social Work	399
Elementary Education and Teaching	388
Multi-/Interdisciplinary Studies, Other	356
Computer and Information Sciences, General	355
Cosmetology/Cosmetologist, General	350
Speech Communication and Rhetoric	346
Human Resources Management/Personnel Administration, General	323
Finance, General	318
Medicine	298
Marketing/Marketing Management, General	277
Social Psychology	269
Journalism	266
Licensed Practical/Vocational Nurse Training	251
Law	240
Educational Leadership and Administration, General	235
Osteopathic Medicine/Osteopathy	235
Kinesiology and Exercise Science	227
English Language and Literature, General	217
Economics, General	213
Special Education and Teaching, General	203
Political Science and Government, General	198
Medical/Clinical Assistant	192
Health Services/Allied Health/Health Sciences, General	187

Mechanical Engineering	185
Chemistry, General	181
Divinity/Ministry	181
History, General	178
Curriculum and Instruction	172
Health/Health Care Administration/Management	168
Theology/Theological Studies	167
Logistics, Materials, and Supply Chain Management	166
Education, General	163
Information Technology	163
Massage Therapy/Therapeutic Massage	163
Electrical and Electronics Engineering	157
Civil Engineering, General	151
Management Information Systems, General	151
Emergency Medical Technology/Technician (EMT Paramedic)	147
Railroad and Railway Transportation	147
Physical Therapy/Therapist	145
Music, General	142
Sport and Fitness Administration/Management	140
Organizational Leadership	139
Counseling Psychology	134
Heating, Air Conditioning, Ventilation and Refrigeration Maintenance Technology/Technician	132
Research and Experimental Psychology, Other	130
Mathematics, General	128
Welding Technology/Welder	128
Secondary Education and Teaching	127
Public Administration	125
Medical Insurance Coding Specialist/Coder	124
Project Management	124
Aesthetician/Esthetician and Skin Care Specialist	123
Biomedical Sciences, General	120

Health Information/Medical Records Administration/Administrator	118
Liberal Arts and Sciences, General Studies and Humanities, Other	118
Sociology	113
Management Science	107
Dentistry	105
Fine/Studio Arts, General	102
Industrial Production Technologies/Technicians, Other	102
Behavioral Sciences	101
Education, Other	100



## Targeted Business Sectors:

### General & Advanced Manufacturing

Clay County is home to over 159 manufacturing firms. Manufacturing accounts for 11.2% of the county's employment, compared to the national average of 8.5%. In the region, manufacturing has added over 5,380 workers since 2015. Manufacturing also ranks as a top location quotient of the County, showing a significant geographic concentration compared to the national average. This concentration can be seen in the following manufacturing clusters.

### Advanced Materials

- Our County has a cluster of companies in the engineered materials and polymers spaces. Consider that our territory has the following number of people employed in these industries more than the national average:
  - 14 times the national average of people employed in Printing Ink Manufacturing
  - 12 times the national average of people employed in Tire Retreading
  - 10 times the national average of people employed in Rubber and Plastics Hoses and Belting Manufacturing
  - 6 times the national average of people employed in Paint and Coating Manufacturing
  - 6 times the national average of people employed in Pesticide and Other Agricultural Chemical Manufacturing
  - 4 times the national average of people employed in Polish and Other Sanitation Good Manufacturing
  - 3 times the national average of people employed in All Other Miscellaneous Chemical Product and Preparation Manufacturing
  - 2 times the national average of people employed in Plastics Bottle Manufacturing
  - 2 times the national average of people employed in Custom Compounding of Purchased Resins
  - 2 times the national average of people employed in Polystyrene Foam Product Manufacturing
  - 2 times the national average of people employed in All Other Plastics Product Manufacturing
  
- The labor shed has seen the following growth in advanced material related jobs over the last 5 years:
  - 159% growth in Plastics Plumbing Fixture Manufacturing
  - 147% growth in Plastics Packaging Film and Sheet (including Laminated) Manufacturing
  - 107% growth in Custom Compounding of Purchased Resins
  - 102% growth in In-Vitro Diagnostic Substance Manufacturing
  - 63% growth in Urethane and Other Foam Product (except Polystyrene) Manufacturing

- 45% growth in Industrial Gas Manufacturing
  - 26% growth in Rubber and Plastics Hoses and Belting Manufacturing
  - 22% growth in Adhesive Manufacturing
  - 22% growth in Tire Manufacturing (except Retreading)
  - 21% growth in All Other Plastics Product Manufacturing
  - 19% growth in Plastics Pipe and Pipe Fitting Manufacturing
  - 18% growth in Unlaminated Plastics Film and Sheet (except Packaging) Manufacturing
  - 15% growth in Plastics Material and Resin Manufacturing
- The following quantities of skilled workers are employed in our region:
    - 3076 employed in All Other Plastics Product Manufacturing
    - 1680 employed in Biological Product (except Diagnostic) Manufacturing
    - 988 employed in Pesticide and Other Agricultural Chemical Manufacturing
    - 838 employed in Soap and Other Detergent Manufacturing
    - 649 employed in In-Vitro Diagnostic Substance Manufacturing
    - 449 employed in Plastics Bottle Manufacturing
    - 419 employed in Printing Ink Manufacturing
    - 410 employed in Other Basic Inorganic Chemical Manufacturing
    - 396 employed in Pharmaceutical Preparation Manufacturing
    - 388 employed in Plastics Packaging Film and Sheet (including Laminated) Manufacturing
    - 371 employed in Urethane and Other Foam Product (except Polystyrene) Manufacturing
    - 364 employed in Polish and Other Sanitation Good Manufacturing
    - 334 employed in All Other Miscellaneous Chemical Product and Preparation Manufacturing
    - 284 employed in All Other Basic Organic Chemical Manufacturing
    - 274 employed in Paint and Coating Manufacturing
    - 266 employed in Adhesive Manufacturing
    - 241 employed in Polystyrene Foam Product Manufacturing
    - 232 employed in Unlaminated Plastics Film and Sheet (except Packaging) Manufacturing
    - 203 employed in Rubber and Plastics Hoses and Belting Manufacturing
    - 197 employed in Plastics Material and Resin Manufacturing
    - 151 employed in All Other Rubber Product Manufacturing
    - 109 employed in Photographic Film, Paper, Plate, and Chemical Manufacturing
    - 90 employed in Industrial Gas Manufacturing
    - 81 employed in Plastics Pipe and Pipe Fitting Manufacturing

#### Metalworking

- Our County has a cluster of companies in the metalworking space. Consider that our territory has the following number of people employed in these industries more than the national average:

- 20 times the national average of people employed in Other Metal Valve and Pipe Fitting Manufacturing
- 5 times the national average of people employed in Iron and Steel Pipe and Tube Manufacturing from Purchased Steel
- 5 times the national average of people employed in Packaging Machinery Manufacturing
- 3 times the national average of people employed in Metal Window and Door Manufacturing
- 2 times the national average of people employed in Other Metal Container Manufacturing
- 2 times the national average of people employed in Fabricated Structural Metal Manufacturing
- Over the national average of people employed in Rolled Steel Shape Manufacturing
- Over the national average of people employed in Spring Manufacturing
- The labor shed has seen the following growth in metalworking related jobs over the last 5 years:
  - 126% growth in Hardware Manufacturing
  - 120% growth in Saw Blade and Handtool Manufacturing
  - 88% growth in Iron and Steel Forging
  - 68% growth in Metal Kitchen Cookware, Utensil, Cutlery, and Flatware (except Precious) Manufacturing
  - 60% growth in All Other Miscellaneous Fabricated Metal Product Manufacturing
  - 43% growth in Small Arms, Ordnance, and Ordnance Accessories Manufacturing
  - 42% growth in Copper Rolling, Drawing, Extruding, and Alloying
  - 38% growth in Metal Window and Door Manufacturing
  - 33% growth in Fabricated Pipe and Pipe Fitting Manufacturing
  - 26% growth in Plumbing Fixture Fitting and Trim Manufacturing
  - 25% growth in Fabricated Structural Metal Manufacturing
  - 21% growth in Prefabricated Metal Building and Component Manufacturing
  - 18% growth in Plate Work Manufacturing
  - 15% growth in Small Arms Ammunition Manufacturing
  - 14% growth in Nonferrous Forging
  - 10% growth in Iron and Steel Pipe and Tube Manufacturing from Purchased Steel
- The following quantities of skilled workers are employed in our region:
  - 3293 Welders, Cutters, Solderers, and Brazers
  - 2442 Industrial Machinery Mechanics

- 1967 Machinists
- 1800 Small Arms Ammunition Manufacturing
- 1699 Electrical Engineers
- Tenders, Metal and Plastic
- 1,790 Multiple Machine Tool Setters, Operators, and Tenders, Metal and Plastic
- 1501 All Other Miscellaneous Fabricated Metal Product Manufacturing
- 1458 Molding, Coremaking, and Casting Machine Setters, Operators
- 1145 Metal Window and Door Manufacturing
- 1069 Machine Shops
- 1052 Sheet Metal Work Manufacturing
- 650 Other Metal Valve and Pipe Fitting Manufacturing
- 623 Plumbing Fixture Fitting and Trim Manufacturing
- 585 Metal Can Manufacturing
- 425 Prefabricated Metal Building and Component Manufacturing
- 371 Fabricated Structural Metal Manufacturing
- 346 Saw Blade and Handtool Manufacturing
- 309 Metal Coating, Engraving (except Jewelry and Silverware), and Allied Services to Manufacturers
- 275 Aluminum Foundries (except Die-Casting)
- 255 Plate Work Manufacturing
- 205 Copper Rolling, Drawing, Extruding, and Alloying
- 187 Ornamental and Architectural Metal Work Manufacturing
- 177 Other Metal Container Manufacturing
- 171 Steel Wire Drawing
- 168 Iron Foundries
- 160 Bolt, Nut, Screw, Rivet, and Washer Manufacturing
- 159 Electroplating, Plating, Polishing, Anodizing, and Coloring
- 146 Other Fabricated Wire Product Manufacturing

#### Automotive

- Our County has a cluster of companies in the automotive manufacturing space. Consider that our territory has the following number of people employed in these industries more than the national average:
  - 148 times the national average of people employed in Light Truck and Utility Vehicle Manufacturing
  - 6 times the national average of people employed in Motor Vehicle Seating and Interior Trim Manufacturing
  - 4 times the national average of people employed in Automobile Manufacturing
  - 4 times the national average of people employed in Motor Vehicle Body Manufacturing
- The labor shed has seen the following growth in automotive manufacturing related jobs over the last 5 years:
  - 241% growth in Motor Vehicle Metal Stamping

- 88% growth in Heavy Duty Truck Manufacturing
- 63% growth in Motor Vehicle Seating and Interior Trim Manufacturing
- 57% growth in Motor Vehicle Body Manufacturing
- 30% growth in Motor Vehicle Transmission and Power Train Parts Manufacturing
- The following quantities of skilled workers are employed in our region:
  - 6,999 Light Truck and Utility Vehicle Manufacturing workers
  - 4,851 Electricians
  - 3,293 Welders, Cutters, Solderers, and Brazers
  - 2,442 Industrial Machinery Mechanics
  - 2,141 Automobile Manufacturing workers
  - 1,967 Machinists
  - 1,935 Motor Vehicle Seating and Interior Trim Manufacturing workers
  - 1,699 Electrical Engineers
  - 1,458 Molding, Coremaking, and Casting Machine Setters, Operators, and Tenders, Metal and Plastic
  - 1,125 Electronics Engineers, Except Computer
  - 539 Other Motor Vehicle Parts Manufacturing workers
  - 517 Motor Vehicle Electrical and Electronic Equipment Manufacturing
  - 498 Motor Vehicle Metal Stamping
  - 211 Motor Vehicle Body Manufacturing
  - 135 Motor Vehicle Brake System Manufacturing
  - 126 Heavy Duty Truck Manufacturing
  - 108 Motor Vehicle Gasoline Engine and Engine Parts Manufacturing

#### Food Manufacturing

- Our County has a cluster of companies in the food processing space. Consider that our territory has the following number of people employed in these industries more than the national average:
  - 16 times the national average of people employed in Dry Pasta, Dough, and Flour Mixes Manufacturing from Purchased Flour
  - 16 times the national average of people employed in Ice Manufacturing
  - 15 times the national average of people employed in Wet Corn Milling
  - 2 times the national average of people employed in Frozen Fruit, Juice, and Vegetable Manufacturing
  - 2 times the national average of people employed in All Other Miscellaneous Food Manufacturing

- The labor shed has seen the following growth in food manufacturing related jobs over the last 5 years:
  - 560% growth in Chocolate and Confectionery Manufacturing from Cacao Beans
  - 429% Fluid Milk Manufacturing
  - 369% growth in Bottled Water Manufacturing
  - 313% growth in Breakfast Cereal Manufacturing
  - 208% growth in Frozen Specialty Food Manufacturing
  - 127% growth in Ice Manufacturing
  - 88% growth in Dog and Cat Food Manufacturing
  - 67% growth in Meat Processed from Carcasses
  - 66% growth in Perishable Prepared Food Manufacturing
  - 64% growth in Breweries
  - 59% growth in Fruit and Vegetable Canning
  - 51% growth in Frozen Fruit, Juice, and Vegetable Manufacturing
  - 28% growth in Confectionery Manufacturing from Purchased Chocolate
  - 27% growth in Other Snack Food Manufacturing
  - 26% growth in Cookie and Cracker Manufacturing
  - 24% growth in Flour Milling
  - 23% All Other Miscellaneous Food Manufacturing
  
- The following quantities of skilled workers are employed in our region:
  - 920 Dog and Cat Food Manufacturing
  - 741 Other Animal Food Manufacturing
  - 673 All Other Miscellaneous Food Manufacturing
  - 642 Cookie and Cracker Manufacturing
  - 627 Commercial Bakeries
  - 615 Fats and Oils Refining and Blending
  - 526 Flour Milling
  - 469 Soft Drink Manufacturing
  - 460 Fruit and Vegetable Canning
  - 392 Dry Pasta, Dough, and Flour Mixes Manufacturing from Purchased Flour
  - 360 Spice and Extract Manufacturing
  - 291 Fluid Milk Manufacturing
  - 222 Soybean and Other Oilseed Processing
  - 211 Bottled Water Manufacturing
  - 182 Nonchocolate Confectionery Manufacturing
  - 174 Frozen Fruit, Juice, and Vegetable Manufacturing
  - 159 Perishable Prepared Food Manufacturing
  - 151 Frozen Specialty Food Manufacturing
  - 142 Confectionery Manufacturing from Purchased Chocolate
  - 139 Wet Corn Milling

### Entertainment & Recreation

Entertainment & Recreation has shown 10% growth with over 271 jobs added since 2015. Additionally, Entertainment & Recreation also ranks as the second largest location quotient of the County, showing a significant geographic concentration compared to the national average. This concentration can be seen in the following entertainment clusters.

- 7 times the national average of people employed in Casinos (except Casino Hotels)
  - 6 times the national average of people employed in Amusement and Theme Parks
  - 3 times the national average of people employed in Casino Hotels
  - 3 times the national average of people employed in All Other Amusement and Recreation Industries
- The labor shed has seen the following growth in entertainment and recreation related jobs over the last 5 years:
    - 113% growth in Amusement Arcades
    - 53% growth in Skiing Facilities
    - 13% growth in Other Spectator Sports
    - 4% growth in All Other Amusement and Recreation Industries
  - The following quantities of workers are employed in our region:
    - 6617 Hotels (except Casino Hotels) and Motels
    - 4355 Fitness and Recreational Sports Centers
    - 2732 Golf Courses and Country Clubs
    - 2270 All Other Amusement and Recreation Industries
    - 2059 Casinos (except Casino Hotels)
    - 1863 Independent Artists, Writers, and Performers
    - 1153 Sports Teams and Clubs
    - 666 Casino Hotels
    - 618 Amusement and Theme Parks
    - 560 Museums
    - 518 Other Spectator Sports
    - 468 Bowling Centers
    - 446 Promoters of Performing Arts, Sports, and Similar Events with Facilities
    - 398 Theater Companies and Dinner Theaters
    - 332 Amusement Arcades
    - 323 Zoos and Botanical Gardens
    - 305 Promoters of Performing Arts, Sports, and Similar Events without Facilities
    - 281 Musical Groups and Artists
    - 147 Nature Parks and Other Similar Institutions
    - 140 Racetracks

### Transportation & Warehousing

Transportation & Warehousing has shown an average annual growth of 3.6% with over 1,158 jobs added since 2015. Additionally, Transportation & Warehousing also ranks among the top five location quotients of the County, showing a significant geographic concentration compared to the national average. This concentration can be seen in the following Transportation & Warehousing clusters.

- 11 times the national average of people employed in Support Activities for Rail Transportation
  - 7 times the national average of people employed in Rail Transportation (non-covered)
  - 5 times the national average of people employed in Farm Product Warehousing and Storage
  - 3 times the national average of people employed in General Freight Trucking, Long-Distance, Truckload
  - 3 times the national average of people employed in General Freight Trucking, Long-Distance, Less Than Truckload
  - 2 times the national average of people employed in Specialized Freight (except Used Goods) Trucking, Long-Distance
  - 2 times the national average of people employed in Freight Transportation Arrangement
  - 2 times the national average of people employed in Used Household and Office Goods Moving
  - 2 times the national average of people employed in Other Support Activities for Road Transportation
- The labor shed has seen the following growth in transportation and warehousing related jobs over the last 5 years:
    - 123% General Warehousing and Storage
    - 47% Other Warehousing and Storage
    - 45% Farm Product Warehousing and Storage
    - 19% Other Support Activities for Air Transportation
    - 18% General Freight Trucking, Local
    - 17% General Freight Trucking, Long-Distance, Less Than Truckload
    - 16% Other Support Activities for Road Transportation
    - 13% Freight Transportation Arrangement
    - 5% Support Activities for Rail Transportation
  - The following quantities of skilled workers are employed in our region:
    - 14892 General Warehousing and Storage
    - 6646 General Freight Trucking, Long-Distance, Truckload
    - 3888 General Freight Trucking, Long-Distance, Less Than Truckload
    - 3592 Freight Transportation Arrangement



- 3539 Rail Transportation (non-covered)
- 1731 General Freight Trucking, Local
- 1427 Specialized Freight (except Used Goods) Trucking, Long-Distance
- 1353 Support Activities for Rail Transportation
- 1230 Specialized Freight (except Used Goods) Trucking, Local
- 1173 Refrigerated Warehousing and Storage
- 1138 Used Household and Office Goods Moving
- 825 Scheduled Passenger Air Transportation
- 640 Other Support Activities for Road Transportation
- 603 Other Support Activities for Air Transportation
- 449 Other Warehousing and Storage

### Professional, Scientific, & Technical Services

Professional Services is ranked second among top growing industries in the region, showing an average annual growth of 1.6% with over 7,982 jobs added since 2015. Additionally, Professional Services ranks among the top five of 2020 industry earnings per worker in the region. Professional Services also ranks among the top five location quotients of the region, showing a significant geographic concentration compared to the national average. This concentration can be seen in the following Professional Service clusters in the County.

- 5 times the national average of people employed in Computer Systems Design Services
- 4 times the national average of people employed in Advertising Agencies
- Over the national average of people employed in Drafting Services
- Over the national average of people employed in Landscape Architectural Services
- The labor shed has seen the following growth in professional service-related jobs over the last 5 years:
  - 547% Research and Development in Nanotechnology
  - 117% Geophysical Surveying and Mapping Services
  - 100% Administrative Management and General Management Consulting Services
  - 88% All Other Legal Services
  - 47% Advertising Material Distribution Services
  - 46% Other Specialized Design Services
  - 32% Other Computer Related Services
  - 31% Title Abstract and Settlement Offices
  - 29% Computer Systems Design Services
  - 27% Environmental Consulting Services
  - 22% Landscape Architectural Services
  - 21% Process, Physical Distribution, and Logistics Consulting Services
  - 21% Custom Computer Programming Services
  - 18% Interior Design Services

- 17% Research and Development in the Physical, Engineering, and Life Sciences (except Nanotechnology and Biotechnology)
  - 13% Veterinary Services
  - 12% Drafting Services
  - 11% Advertising Agencies
- 
- The following quantities of workers are employed in our region:
    - 19088 Computer Systems Design Services
    - 14718 Engineering Services
    - 10401 Custom Computer Programming Services
    - 9241 Offices of Lawyers
    - 7871 Administrative Management and General Management Consulting Services
    - 3782 Marketing Consulting Services
    - 3507 Veterinary Services
    - 3360 Offices of Certified Public Accountants
    - 2992 Other Accounting Services
    - 2911 Advertising Agencies
    - 2846 All Other Professional, Scientific, and Technical Services
    - 2464 Research and Development in the Physical, Engineering, and Life Sciences (except Nanotechnology and Biotechnology)
    - 2365 Architectural Services
    - 1304 Process, Physical Distribution, and Logistics Consulting Services
    - 1067 Research and Development in Biotechnology (except Nanobiotechnology)
    - 829 Testing Laboratories
    - 770 Research and Development in Nanotechnology

## Qualifications

The Next Move Group is a site selection and economic development firm which features an executive team with more than 100 combined years' experience in site selection and economic development including a member of the Site Selectors Guild.

The Next Move Group partners with the University of Southern Mississippi's Trent Lott Economic Development Research Center for labor, business, and economic development related research. The University features a multitude of Ph.Ds. and Master's students which work on projects for the Next Move Group with access to numerous databases including, but not limited to: Chmura JobsEQ, ESRI, Hoovers, Claritas, IBIS, and State Book.



**Next Move Group**  
***We Are Jobs***

[www.thenextmovegroup.com](http://www.thenextmovegroup.com)

314-421-9110

[info@thenextmovegroup.com](mailto:info@thenextmovegroup.com)

St. Louis | New Orleans | Greenville, SC