

Ozark Region Industry Analysis



The Ozark Region is situated in the southwestern portion of the State of Missouri. Counties included in the Ozark Region are: Christian, Dallas, Greene, Polk, Stone, Taney and Webster.

This region includes several major cities such as Springfield and Branson. Many of Missouri's major highways cross through this region. Interstate 44 runs through the center of the region. In addition, Highway 60 and Highway 160 cross east/west through the region while Highway 65 runs north/south, allowing a great deal of travel through the area.

Industry Employment Trends 2009 – 2014

The Ozark Region had employment growth of 5.1% from 2009 to 2014, surpassing the statewide employment growth of 2.2% during the same period. Industries with the largest employment growth by percentage were *Administrative and Support Services, Professional, Scientific, and Technical Services,* and *Nursing and Residential Care Facilities*. Health care industries all saw employment growth, with the *Nursing and Residential Care* industry topping the sector with 14.6%. Three industries had employment loss during the period: *Specialty Trade Contractors (-6.8%), General Merchandise Stores (-3%),* and *Food Services and Drinking Places (-0.2%).*

NAICS Sector	2009 Employment	2014 Employment	Change	Percent Change
Total Region Employment	218,925	230,107	11,182	5.1%
Educational Services	20,100	22,005	1,905	9.5%
Food Service and Drinking Places	21,118	21,081	-37	-0.2%
Hospitals	16,072	16,443	371	2.3%
Administrative and Support Services	10,518	14,400	3,882	37%
Ambulatory Health Care Services	11,459	11,781	322	2.8%
Professional, Scientific, and Technical Services	6,662	8,642	1,980	29.7%
Nursing and Residential Care Facilities	6,190	7,092	902	14.6%
General Merchandise Stores	6,838	6,635	-203	-3%
Specialty Trade Contractors	6,348	5,919	-429	-6.8%
Truck Transportation	5,227	5,899	672	12.9%

Industry Wage Trends 2009 – 2014

The Ozark Region saw overall wages increase by 7.5%, or over \$2,400, from 2009 to 2014, slightly less than statewide wage growth of 9.4%. Industries with the largest wage growth by percentage were *Ambulatory Health Care Services* (21.7%), *Professional, Scientific, and Technical Services* (19.9%), and *Merchant Wholesalers, Durable Goods* (10.4%). The industries with the highest wages were *Chemical Manufacturing* (\$84,582), *Ambulatory Health Care Services* (\$65,268), and *Professional, Scientific, and Technical Services* (\$46,572).

NAICS Sector	2009 Wages	2014 Wages	Change	Percent Change
Overall Region Average Wage	\$32,268	\$34,680	\$2,412	7.5%
Chemical Manufacturing	\$85,512	\$84,528	-\$984	-1.2%
Ambulatory Health Care Services	\$53,640	\$65,268	\$11,628	21.7%
Professional, Scientific, and Technical Services	\$38,844	\$46,572	\$7,728	19.9%
Insurance Carriers and Related Activities	\$42,432	\$44,760	\$2,328	5.5%
Educational Services	\$45,360	\$42,684	-\$2,676	-6%
Merchant Wholesalers, Nondurable Goods	\$38,100	\$41,460	\$3,360	8.8%
Management of Companies and Enterprises	\$43,116	\$41,244	-\$1,872	-4.3%
Merchant Wholesalers, Durable Goods	\$37,344	\$41,220	\$3,876	10.4%
Hospitals	\$40,032	\$40,224	\$192	0.5%
Credit Intermediation and Related Activities	\$35,784	\$38,796	\$3,012	8.4%

Industry Employment Projections 2012 – 2022

Based on long-term industry employment projections five industries that employ 5,000 or more in the list below is forecast to have double-digit percentage growth by 2022. Industries predicted to have the highest employment growth are *Administrative and Support Services* (34.2% or 4,093 jobs), *Specialty Trade Contractors* (27.4% or 1,568 jobs), and *Professional, Scientific, and Technical Services* (21% or 1,478 jobs). The health care and service industries groups are predicted to have the largest employment growth, with an estimated 4,271 and 5,571 more jobs respectively.

NAICS Sector	Change	Percent Change
Food Service and Drinking Places	1,499	7.5%
Educational Services	1,110	5.9%
Hospitals	1,367	8.5%
Administrative and Support Services	4,093	34.2%
Ambulatory Health Care Services	2,218	20%
Professional, Scientific, and Technical Services	1,478	21%
Local Government, Excluding Education and Hospitals	192	2.4%
General Merchandise Stores	441	5.7%
Nursing and Residential Care Facilities	686	10.2%
Specialty Trade Contractors	1,568	27.4%

Industry Clusters and Top Employers

The Ozark Region's highly concentrated industries are in health care, service, and tourism, as determined by the location quotient indicator. The location quotient (LQ) indicator describes how concentrated an industry is in a region in relation to the nation, with 1.00 being the national average. The most concentrated industry in the region is *Truck Transportation*, followed by *Hospitals* and *Accommodation*. Logistics is a major industry cluster due to its location along key highways in the state and high concentration of the *Truck Transportation*, *Merchant Wholesaler*, and *Warehousing and Storage* industries.

NAICS Sector	2009 Location Quotient	2013 Location Quotient
Truck Transportation	2.58	2.51
Hospitals	1.83	1.84
Accommodation	1.72	1.83
Sporting Goods, Hobby, Book, and Music Stores	1.64	1.74
Telecommunications	1.11	1.42
General Merchandise Stores	1.40	1.41
Credit Intermediation and Related Activities	1.26	1.24
Nursing and Residential Care Facilities	1.12	1.22
Amusement, Gambling, and Recreation Industries	1.17	1.20
Merchant Wholesalers, Durable Goods	1.27	1.18

The Ozark Region's top employers are in Logistics, Health Care, and Tourism Sectors. Large logistics employers are based in the *Merchant Wholesalers, Nondurable Goods* industry like **Kraft Foods**, **O'Reilly Auto Parts**, and **Associated Wholesale Grocers**. Top employers in the Hospital Industry are **St. John's Hospital**, **Cox Medical Center**, and **Citizens Memorial Hospital**. Large companies in the tourism industry are **Bass Pro Shops**, **Kanakuk Kamps**, and **Silver Dollar City**.

Notes

1. 2nd Quarter 2009 and 2nd Quarter 2014 Employment Data from Quarterly Workforce Indicators (QWI) dataset, U.S. Census Bureau, Center for Economic Studies . Industries with less than 5,000 employees were not included in the list.

Sources

1. Industry Employment Projections from MERIC
2. Location Quotient information is calculated from Second Quarter 2009 and 2014 employment figures from the Quarterly Census of Employment and Wages (QCEW), a cooperative program between the Bureau of Labor Statistics and state Labor Market Information offices.
3. Top employer information from InfoUSA Employer Database.

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