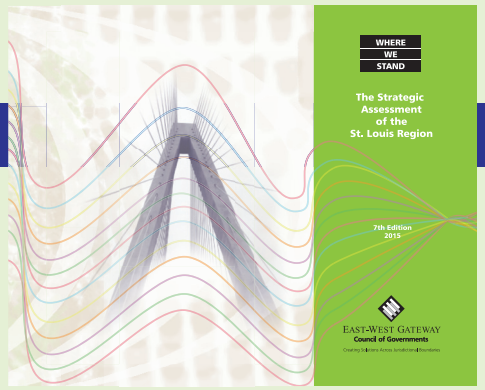


The Strategic Assessment of the St. Louis Region

7th Edition, 2015

WHERE WE STAND

The 7th Edition of *Where We Stand* (WWS) presents 222 rankings comparing St. Louis to the 50 most populated metropolitan areas in the United States. Since 1992 East-West Gateway has produced WWS to ignite discussion and help guide decision making. WWS covers a range of topics important to the region including demographics, the economy, and education. This edition includes 90 new measures on topics such as innovation, segregation, and economic opportunity.

This document is a portion of the full publication.
Download additional chapters, the entire *Where We Stand* publication, and/or WWS data at www.ewgateway.org/wws.

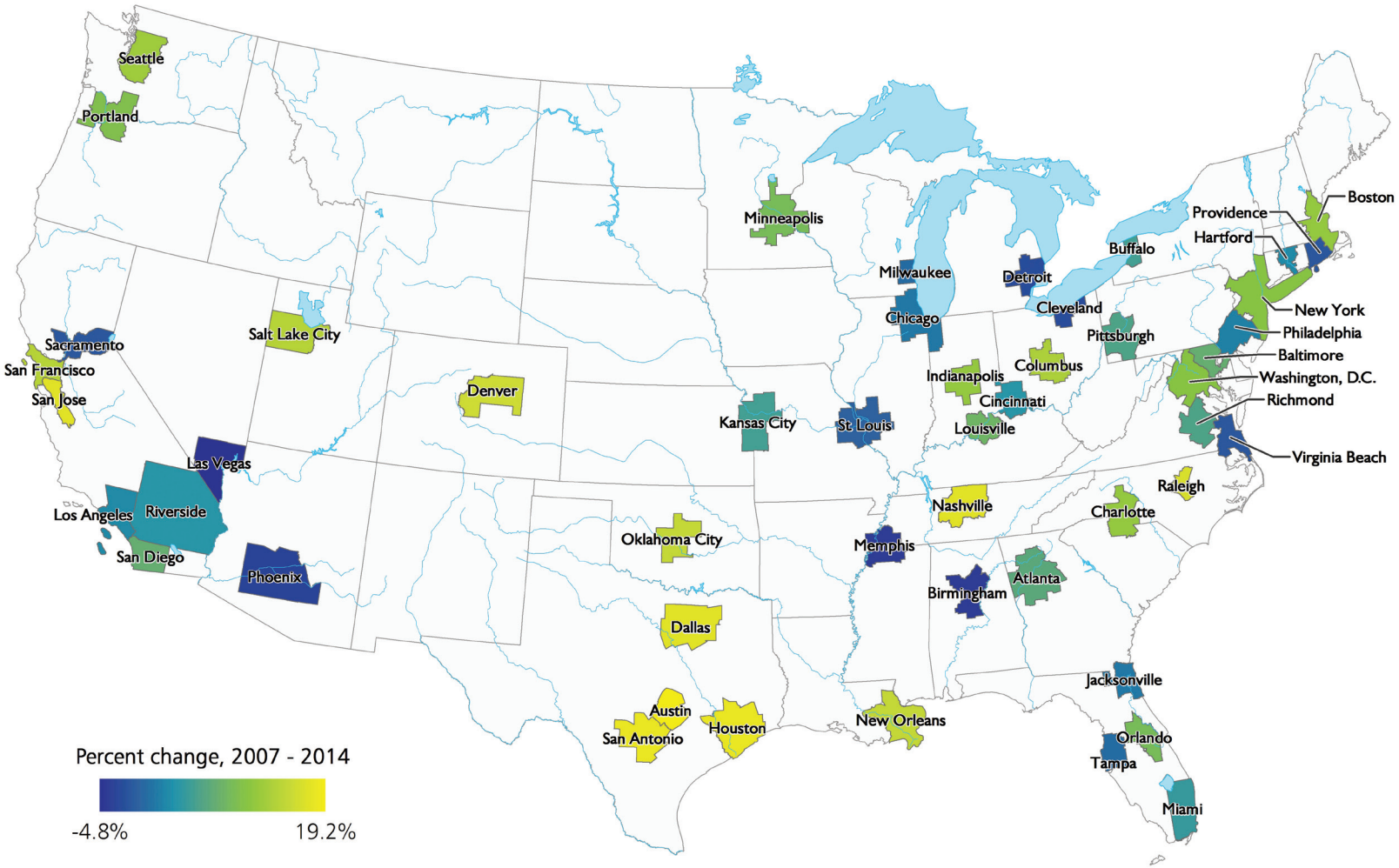
Economy

This publication was supported, in part, by a grant provided from the U.S. Department of Transportation through the Missouri Department of Transportation and the Illinois Department of Transportation. The opinions, findings, and conclusions expressed in this publication are those of the authors and not necessarily those of the Missouri Highways and Transportation Commission, the Illinois Department of Transportation, the Federal Highway Administration, or the Federal Transit Administration.

The East-West Gateway Council of Governments (EWG) hereby gives public notice that it is the policy of the agency to assure full compliance with Title VI of the Civil Rights Act of 1964, the Civil Rights Restoration Act of 1987, Executive Order 12898 on Environmental Justice, and related statutes and regulations in all programs and activities. Title VI requires that no person in the United States of America shall, on the grounds of race, color, sex, or national origin, be excluded from the participation in, be denied the benefits of, or be otherwise subjected to discrimination under any program or activity for which EWG receives federal financial assistance. Any person who believes they have been aggrieved by an unlawful discriminatory practice under Title VI has a right to file a formal complaint with EWG. Any such complaint must be in writing and filed with EWG's Title VI Coordinator within one hundred eighty (180) days following the date of the alleged discriminatory occurrence. For more information, or to obtain a Title VI Discrimination Complaint Form, please see our web site at http://www.ewgateway.org/TitleVI or call (314) 421-4220 or (618) 274-2750.

Change in Employment

—See page 73 for WWS table with complete data and rankings—



Broad Measures

Generally, regions that specialize in energy, finance, and technology tend to have more robust economies relative to other peer regions. Regions with high and stable or growing gross domestic product (GDP), large increases in employment, and/or relatively low unemployment rates, include:

- Technology centers such as San Jose, San Francisco, Seattle, Portland, and Austin
- Houston, Denver, and Oklahoma City where there is a strong presence of energy producers, as well as the coal producing region of Pittsburgh
- Boston and New York, national leaders in financial services, and Columbus, Charlotte, and Salt Lake City, regional financial hubs

GDP is the total value of all goods and services produced in a region. Per capita GDP is an indicator of the productivity of a regional economy. Regions with the lowest per capita GDP include several Sun Belt regions with an abundance of low-wage jobs. Eight of the 10 regions with the lowest GDP per capita are also among the 10 regions with the largest proportion of retail as a percentage of GDP. Traditional Rust Belt regions, such as Buffalo and Providence, are also among the regions with the lowest GDP per capita. These regions are former manufacturing powerhouses that now struggle to find a new niche in the world economy.

St. Louis is close to the average for the United States with a per capita GDP of $52,000. The region generates more output than many regions in the South as well as some Rust Belt regions, although it generally lags behind most of its Midwest competitors.

In 2013 the national GDP per capita surpassed its pre-recession peak, with an overall increase of 0.6 percent from 2007. About half of the peer regions also fully recovered, with GDPs per capita in 2013 above their pre-recession values. Some of the regions remained far below their pre-recession level. Las Vegas ranks 50th with GDP per capita in 2013 that was 18.7 percent lower than in 2007.

Employment increased 0.8 percent nationwide from 2007 to 2014, with most of the peer regions also seeing an increase. The St. Louis region ranks 41st, with a loss of 2.7 percent of jobs since 2007.

Employment in the East-West Gateway 8-county region has grown from 969,000 employees in 1970 to 1.3 million in 2013. From 1970 to 2010, the only decade the region saw net employment decline was from 2000 to 2010. From 2010 to 2013 the region saw a small 2.6 percent gain in employment. St. Charles County experienced the largest percentage increases in employment among the counties in the region over the entire time period and in almost every decade.

The unemployment rate in St. Louis was 6.3 percent in 2014, slightly higher than the nationwide rate, and higher than all other peer Midwest regions except for Detroit and Chicago. The unemployment rate in all but three of the peer regions was higher in 2014 than in 2007, demonstrating the lingering effects of the Great Recession. St. Louis had a smaller increase than most regions, ranking 35th with a one percentage point increase.

Wage and Salary Employment by County
East-West Gateway Region, 1970 to 2013

County	1970	1980	1990	2000	2010	2013
Madison	87,360	86,346	93,723	102,677	101,098	101,948
Monroe	3,216	3,712	5,163	7,775	8,724	9,043
St. Clair	81,654	86,555	88,485	102,934	105,416	104,174
Franklin	15,437	21,213	29,605	36,762	37,303	38,784
Jefferson	15,992	22,435	35,186	46,537	51,284	51,570
St. Charles	19,152	33,684	69,976	102,853	131,334	142,297
St. Louis	319,727	423,947	612,242	691,838	612,735	625,740
City of St. Louis	426,607	380,989	299,517	272,316	237,305	245,451
East-West Gateway Region	**969,145**	**1,058,881**	**1,233,897**	**1,363,692**	**1,285,199**	**1,319,007**

Note: In order to show historical data, this table uses BEA data. BLS data are used for the WWS table in order to capture the most recent data available (which is not available through BEA).

Source: Bureau of Economic Analysis

Gross Domestic Product (GDP)

Dollars per capita, 2013

1	**San Jose**	**102,053**
2	San Francisco	85,718
3	Houston	81,683
4	Boston	78,920
5	Seattle	78,859
6	Washington, D.C.	77,746
7	New York	73,551
8	Hartford	71,228
9	Portland	70,717
10	Salt Lake City	66,736
11	Denver	66,251
12	New Orleans	65,899
13	Minneapolis	65,809
14	Dallas	65,597
15	Indianapolis	64,753
16	Philadelphia	63,517
17	Los Angeles	62,753
18	Chicago	61,840
19	San Diego	61,406
20	Baltimore	60,866
21	Milwaukee	60,104
22	Cleveland	59,496
23	Charlotte	59,479
24	Columbus	58,025
25	Nashville	57,342
26	Kansas City	57,081
27	Cincinnati	55,688
28	Pittsburgh	55,607
29	Atlanta	55,603
30	Austin	55,092
31	Raleigh	55,030
32	Richmond	54,935
33	Oklahoma City	54,484
United States		**52,980**
34	Birmingham	52,408
35	Detroit	52,318
36	**St. Louis**	**52,098**
37	Virginia Beach	51,876
38	Louisville	51,142
39	Memphis	50,634
40	Sacramento	48,778
41	Orlando	48,630
42	Miami	47,937
43	Phoenix	47,574
44	Las Vegas	45,824
45	Providence	45,676
46	Buffalo	45,443
47	Jacksonville	44,486
48	Tampa	42,626
49	San Antonio	42,078
50	**Riverside**	**28,873**

Source: Bureau of Economic Analysis; U.S. Census Bureau, Population Estimates

Change in Gross Domestic Product per Capita

Percent change in chained 2009 dollars, 2007-2013

1	**Portland**	**21.2**
2	San Jose	11.5
3	Pittsburgh	6.8
4	Houston	6.2
5	Nashville	5.5
6	Buffalo	5.3
7	Oklahoma City	4.2
8	Cleveland	3.6
9	Austin	3.1
10	Baltimore	3.1
11	Columbus	3.0
12	Cincinnati	3.0
13	Boston	2.8
14	Providence	2.2
15	Dallas	2.2
16	San Antonio	2.1
17	Seattle	1.0
18	Philadelphia	1.0
19	New York	0.8
United States		**0.6**
20	Minneapolis	0.5
21	**St. Louis**	**0.4**
22	Denver	0.3
23	Kansas City	-0.1
24	Virginia Beach	-0.4
25	Indianapolis	-0.9
26	Milwaukee	-1.1
27	Salt Lake City	-1.3
28	Birmingham	-1.4
29	San Francisco	-1.5
30	Richmond	-2.0
31	Charlotte	-2.1
32	Louisville	-2.2
33	Detroit	-2.3
34	Chicago	-2.7
35	Washington, D.C.	-3.4
36	Los Angeles	-4.3
37	San Diego	-4.4
38	Raleigh	-4.9
39	Hartford	-6.4
40	Sacramento	-7.4
41	New Orleans	-8.0
42	Memphis	-8.0
43	Tampa	-8.3
44	Atlanta	-9.1
45	Riverside	-10.9
46	Phoenix	-11.5
47	Miami	-12.1
48	Jacksonville	-13.2
49	Orlando	-14.4
50	**Las Vegas**	**-18.7**

Source: Bureau of Economic Analysis

Change in Employment

Percent change, 2007-2014

1	**Austin**	**19.2**
2	Houston	13.6
3	San Antonio	12.6
4	Nashville	10.3
5	San Jose	9.3
6	Dallas	9.3
7	Raleigh	8.3
8	Denver	8.2
9	New Orleans	7.3
10	Oklahoma City	7.1
11	Salt Lake City	6.4
12	San Francisco	6.0
13	Columbus	5.4
14	Seattle	4.7
15	Indianapolis	4.3
16	Boston	4.2
17	Charlotte	4.2
18	Washington, D.C.	3.4
19	New York	3.3
20	Portland	3.1
21	Minneapolis	2.5
22	Orlando	2.5
23	Louisville	2.5
24	San Diego	2.1
25	Baltimore	2.1
26	Atlanta	1.7
27	Richmond	1.3
28	Pittsburgh	1.3
29	Kansas City	1.1
30	Buffalo	1.1
United States		**0.8**
31	Miami	0.1
32	Riverside	-0.1
33	Cincinnati	-0.1
34	Hartford	-0.3
35	Los Angeles	-0.5
36	Philadelphia	-1.0
37	Chicago	-1.2
38	Jacksonville	-1.3
39	Tampa	-1.9
40	Milwaukee	-2.1
41	**St. Louis**	**-2.7**
42	Virginia Beach	-2.8
43	Providence	-2.8
44	Sacramento	-2.9
45	Detroit	-3.3
46	Cleveland	-3.3
47	Phoenix	-3.4
48	Birmingham	-4.1
49	Memphis	-4.2
50	**Las Vegas**	**-4.8**

Source: Bureau of Labor Statistics, Current Employment Statistics

Unemployment Rate

Unemployed individuals who are looking for work as a percent of the labor force, 2014

1	**Detroit**	**8.5**
2	Riverside	8.2
3	Las Vegas	7.8
4	Memphis	7.6
5	Los Angeles	7.6
6	Providence	7.5
7	Sacramento	7.2
8	Chicago	7.0
9	Atlanta	6.8
10	Hartford	6.6
11	New York	6.4
12	San Diego	6.4
13	Portland	6.4
14	New Orleans	6.4
15	**St. Louis**	**6.3**
16	Miami	6.3
17	Buffalo	6.2
18	Jacksonville	6.2
United States		**6.2**
19	Cleveland	6.2
20	Philadelphia	6.1
21	Baltimore	6.1
22	Tampa	6.1
23	Charlotte	6.0
24	Birmingham	6.0
25	Phoenix	6.0
26	Milwaukee	6.0
27	Orlando	5.9
28	Louisville	5.9
29	Indianapolis	5.7
30	Virginia Beach	5.7
31	Pittsburgh	5.6
32	Kansas City	5.6
33	Richmond	5.5
34	Cincinnati	5.4
35	San Jose	5.3
36	Nashville	5.2
37	San Francisco	5.2
38	Seattle	5.2
39	Boston	5.2
40	Washington, D.C.	5.0
41	Dallas	5.0
42	Raleigh	4.9
43	Houston	4.9
44	Denver	4.8
45	Columbus	4.8
46	San Antonio	4.6
47	Austin	4.2
48	Oklahoma City	4.0
49	Minneapolis	3.9
50	**Salt Lake City**	**3.7**

Source: Bureau of Labor Statistics, Local Area Unemployment Statistics

Change in Unemployment Rate

Percentage point change, 2007-2014

1	**Las Vegas**	**3.3**
2	Los Angeles	2.8
3	Miami	2.7
4	Phoenix	2.6
5	Baltimore	2.5
6	Memphis	2.5
7	Virginia Beach	2.4
8	Birmingham	2.4
9	Atlanta	2.4
10	New Orleans	2.4
11	Richmond	2.3
12	Riverside	2.3
13	Jacksonville	2.3
14	Chicago	2.1
15	Providence	2.1
16	Washington, D.C.	2.1
17	Orlando	2.0
18	New York	2.0
19	Hartford	2.0
20	San Diego	1.9
21	Philadelphia	1.8
22	Sacramento	1.8
23	Tampa	1.7
24	Indianapolis	1.6
United States		**1.5**
25	Seattle	1.5
26	Portland	1.4
27	Buffalo	1.4
28	Detroit	1.3
29	Raleigh	1.3
30	Pittsburgh	1.2
31	Salt Lake City	1.2
32	Nashville	1.1
33	Charlotte	1.0
34	Denver	1.0
35	**St. Louis**	**1.0**
36	Boston	1.0
37	Milwaukee	0.9
38	San Francisco	0.8
39	Louisville	0.8
40	Dallas	0.7
41	Cleveland	0.7
42	Houston	0.7
43	San Antonio	0.6
44	San Jose	0.6
45	Kansas City	0.5
46	Austin	0.5
47	Cincinnati	0.4
48	Columbus	0.0
49	Oklahoma City	-0.2
50	**Minneapolis**	**-0.4**

Source: Bureau of Labor Statistics, Local Area Unemployment Statistics

Recession and Recovery

The recession of 2007 to 2009 was the sharpest economic downturn in the United States since the Great Depression. Gross domestic product (GDP) per capita declined 4.8 percent. The unemployment rate exceeded 10 percent for the first time since the recession of 1981 to 1982. Average housing prices in the largest metropolitan areas fell by nearly one-third, accounting for a substantial proportion of the decrease in household wealth.[1]

The recession officially ended in June 2009 when, nationally, GDP hit its low point. By that time, GDP had also hit bottom for 70 percent of the peer regions. The turning point for employment lagged behind, with the nation and most of the peer regions not bottoming out until the fourth quarter of 2009 or first quarter of 2010.

The Recessions graph shows that the most recent recession was the longest and most severe in the past 60 years. Each line represents a recession, with the vertical dimension showing job loss and recovery, and the horizontal dimension showing the number of months in which employment remained below the pre-recession peak. Thus, the 1981 to 1982 recession bottomed out with a loss of a little more than 3 percent of jobs with pre-recession employment regained within 28 months. In the 2007 to 2009 recession, employment dropped by more than 6 percent and it took 75 months for employment to return to pre-recession levels.

Two types of regions were hardest hit by the recession. First, regions that experienced the most excessive real estate bubbles during the housing boom suffered large losses in employment when the bubble burst. Examples include Phoenix, Miami, and Atlanta. Also hard hit were Detroit and Cleveland, manufacturing centers that were struggling with the loss of jobs to other parts of the world even prior to the recession.

Unlike the rest of the peer regions, the rapidly growing Austin, New Orleans, and San Antonio regions saw increases in employment during the recession, but along with the remainder of the peer regions they also experienced an increase in unemployment.

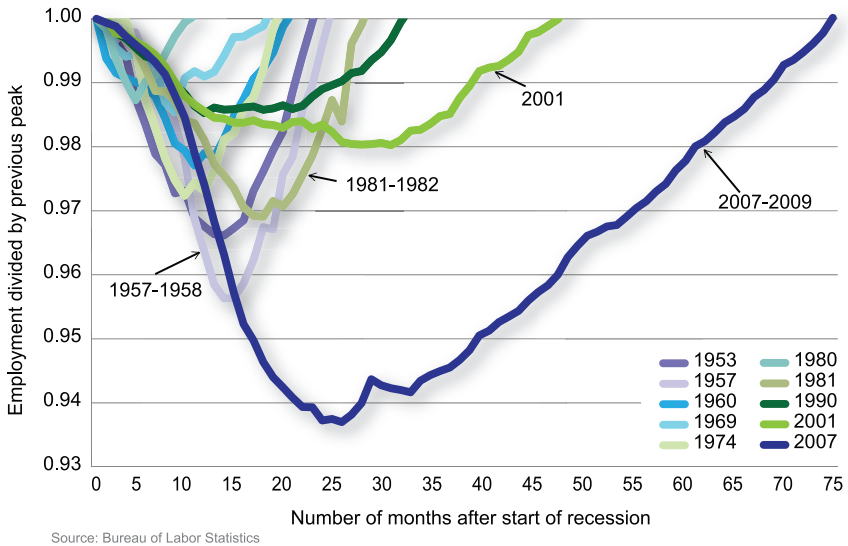
In St. Louis, seasonally-adjusted employment stood at 1,358,700 in February 2008. The region lost more than 82,000 jobs by the end of 2009. Although the region has regained much of its lost employment over the last five years, estimates by the Bureau of Labor Statistics in April 2015 still placed regional employment at 40,000 below the 2008 peak.

Regions with the largest growth in GDP per capita from 2009 to 2013 include regional financial hubs (Columbus and Charlotte), energy producers (Pittsburgh and Houston), and technology centers (Seattle and Portland). Ranking 8th, Nashville enjoys a strong tourism industry. Ranking 3rd, Detroit has benefitted from a small resurgence in U.S. manufacturing, although it still has the highest unemployment rate among the 50 peer regions.

Despite having the highest unemployment rates in 2014, Detroit, Riverside, and Las Vegas are among the regions with the most improvement since the depths of the recession. The latter two regions were particularly hard-hit by the housing crisis. St. Louis ranked 49th out of 50 MSAs on employment growth from 2010 to 2014.

Recessions: Length and Severity of Employment Loss

Ratio of Seasonally-Adjusted Monthly Employment Relative to Previous Peak
United States, 1950 to 2010



Source: Bureau of Labor Statistics

1 Fabian Pfeffer, Sheldon Danziger and Robert Schoeni. Wealth Levels, Wealth Inequality and the Great Recession, Russell Sage Foundation, 2014.

Change in Gross Domestic Product per Capita: Recession

Percent change in chained 2009 dollars, 2007-2009

1	**Portland**	**4.7**
2	Buffalo	1.4
3	Philadelphia	-0.7
4	Virginia Beach	-0.7
5	Washington, D.C.	-1.0
6	Salt Lake City	-1.7
7	Baltimore	-1.9
8	Oklahoma City	-2.0
9	Providence	-2.9
10	New York	-3.2
11	Denver	-3.3
12	Pittsburgh	-3.4
13	Hartford	-3.6
14	Kansas City	-3.7
15	Austin	-3.8
16	Nashville	-3.9
17	Milwaukee	-3.9
18	New Orleans	-3.9
19	Boston	-4.0
20	Richmond	-4.5
United States		**-4.8**
21	San Jose	-4.9
22	**St. Louis**	**-5.0**
23	Los Angeles	-5.2
24	San Diego	-5.2
25	Houston	-5.2
26	Cincinnati	-5.5
27	Dallas	-5.6
28	Cleveland	-5.6
29	Minneapolis	-5.7
30	Indianapolis	-5.9
31	San Francisco	-6.5
32	Raleigh	-6.8
33	Columbus	-6.9
34	Chicago	-7.3
35	San Antonio	-7.9
36	Seattle	-7.9
37	Birmingham	-8.4
38	Memphis	-8.4
39	Louisville	-8.5
40	Atlanta	-9.3
41	Tampa	-9.3
42	Sacramento	-10.1
43	Charlotte	-10.3
44	Orlando	-11.7
45	Jacksonville	-12.2
46	Miami	-12.3
47	Riverside	-12.8
48	Phoenix	-14.4
49	Detroit	-14.6
50	**Las Vegas**	**-15.7**

Source: Bureau of Economic Analysis

Change in Gross Domestic Product per Capita: Recovery

Percent change in chained 2009 dollars, 2009-2013

1	**Seattle**	**21.1**
2	Portland	15.9
3	Detroit	14.4
4	Houston	12.1
5	Columbus	10.7
6	Pittsburgh	10.6
7	Cleveland	9.8
8	Nashville	9.7
9	Charlotte	9.1
10	Cincinnati	9.0
11	Dallas	8.3
12	San Diego	7.6
13	Birmingham	7.6
14	Austin	7.2
15	Boston	7.2
16	San Antonio	7.1
17	Louisville	6.9
18	Minneapolis	6.7
19	Oklahoma City	6.3
20	**St. Louis**	**6.3**
United States		**5.7**
21	Indianapolis	5.3
22	Providence	5.3
23	Baltimore	5.1
24	Chicago	4.9
25	New York	4.1
26	Buffalo	3.8
27	Denver	3.7
28	Kansas City	3.7
29	San Jose	3.6
30	Phoenix	3.4
31	Sacramento	3.0
32	Milwaukee	2.9
33	Richmond	2.6
34	Riverside	2.2
35	San Francisco	2.2
36	Salt Lake City	2.1
37	Raleigh	2.0
38	Philadelphia	1.7
39	Tampa	1.0
40	Los Angeles	0.9
41	Memphis	0.4
42	Virginia Beach	0.4
43	Miami	0.2
44	Atlanta	0.2
45	Jacksonville	-1.2
46	Washington, D.C.	-2.4
47	Hartford	-2.9
48	Orlando	-3.1
49	Las Vegas	-3.5
50	**New Orleans**	**-4.2**

Source: Bureau of Economic Analysis

Change in Employment: Recession

Percent change, 2007-2010

1	**Austin**	**1.7**
2	New Orleans	1.4
3	San Antonio	1.2
4	Houston	-0.8
5	Washington, D.C.	-0.9
6	Buffalo	-1.7
7	Oklahoma City	-1.7
8	Pittsburgh	-1.8
9	Boston	-2.2
10	Dallas	-2.5
11	New York	-3.1
12	Raleigh	-3.2
13	Baltimore	-3.4
14	Denver	-3.8
15	Hartford	-4.0
16	Philadelphia	-4.0
17	Nashville	-4.1
18	Columbus	-4.2
19	Kansas City	-4.2
20	Indianapolis	-4.2
21	Salt Lake City	-4.5
22	Richmond	-5.0
23	**St. Louis**	**-5.2**
24	Seattle	-5.2
25	Virginia Beach	-5.2
26	Minneapolis	-5.3
27	Louisville	-5.3
United States		**-5.6**
28	San Jose	-5.8
29	Cincinnati	-6.0
30	Milwaukee	-6.1
31	Portland	-6.2
32	San Diego	-6.3
33	Charlotte	-6.7
34	Chicago	-6.8
35	San Francisco	-6.9
36	Providence	-7.2
37	Atlanta	-7.5
38	Cleveland	-7.6
39	Memphis	-7.7
40	Birmingham	-7.8
41	Jacksonville	-8.1
42	Orlando	-8.4
43	Los Angeles	-8.6
44	Miami	-9.4
45	Sacramento	-10.0
46	Tampa	-10.1
47	Riverside	-11.0
48	Detroit	-11.5
49	Phoenix	-11.8
50	**Las Vegas**	**-13.4**

Source: Bureau of Labor Statistics, Current Employment Statistics

Change in Employment: Recovery

Percent change, 2010-2014

1	**Austin**	**17.2**
2	San Jose	16.1
3	Nashville	14.9
4	Houston	14.5
5	San Francisco	13.9
6	Denver	12.5
7	Riverside	12.3
8	Dallas	12.1
9	Raleigh	11.9
10	Orlando	11.9
11	Charlotte	11.7
12	Salt Lake City	11.5
13	San Antonio	11.3
14	Miami	10.5
15	Seattle	10.4
16	Columbus	10.1
17	Atlanta	9.9
18	Las Vegas	9.9
19	Portland	9.8
20	Phoenix	9.5
21	Detroit	9.3
22	Tampa	9.2
23	Indianapolis	9.0
24	San Diego	9.0
25	Oklahoma City	9.0
26	Los Angeles	8.9
27	Minneapolis	8.2
28	Louisville	8.2
29	Sacramento	7.8
30	Jacksonville	7.4
United States		**6.7**
31	Richmond	6.6
32	New York	6.6
33	Boston	6.5
34	Cincinnati	6.2
35	Chicago	6.0
36	New Orleans	5.9
37	Baltimore	5.6
38	Kansas City	5.6
39	Providence	4.7
40	Cleveland	4.6
41	Washington, D.C.	4.4
42	Milwaukee	4.3
43	Birmingham	4.0
44	Hartford	3.8
45	Memphis	3.8
46	Pittsburgh	3.2
47	Philadelphia	3.1
48	Buffalo	2.8
49	**St. Louis**	**2.6**
50	**Virginia Beach**	**2.5**

Source: Bureau of Labor Statistics, Current Employment Statistics

Change in Unemployment Rate: Recession

Percentage point change, 2007-2010

1	**Las Vegas**	**9.3**
2	Riverside	7.9
3	Orlando	7.2
4	Miami	7.2
5	Sacramento	7.0
6	Los Angeles	7.0
7	Jacksonville	6.8
8	Charlotte	6.7
9	Detroit	6.7
10	Tampa	6.7
11	Phoenix	6.3
12	Birmingham	6.2
13	San Diego	6.2
14	Seattle	5.9
15	Atlanta	5.9
16	San Jose	5.8
17	Providence	5.7
18	Chicago	5.6
19	San Francisco	5.5
20	Indianapolis	5.4
21	Portland	5.3
22	Salt Lake City	5.2
23	Raleigh	5.0
United States		**5.0**
24	Cincinnati	4.9
25	Denver	4.9
26	Richmond	4.9
27	Louisville	4.8
28	Memphis	4.6
29	Nashville	4.5
30	Baltimore	4.5
31	Hartford	4.5
32	New York	4.5
33	Philadelphia	4.5
34	Virginia Beach	4.4
35	**St. Louis**	**4.3**
36	Columbus	4.2
37	Houston	4.1
38	Milwaukee	3.9
39	Dallas	3.8
40	New Orleans	3.8
41	Buffalo	3.7
42	Kansas City	3.6
43	Pittsburgh	3.6
44	Washington, D.C.	3.4
45	Boston	3.4
46	Austin	3.3
47	San Antonio	3.2
48	Minneapolis	3.0
49	Cleveland	2.9
50	**Oklahoma City**	**1.7**

Source: Bureau of Labor Statistics, Local Area Unemployment Statistics

Change in Unemployment Rate: Recovery

Percentage point change, 2010-2014

1	**Washington, D.C.**	**-1.3**
2	New Orleans	-1.4
3	Oklahoma City	-1.9
4	Virginia Beach	-1.9
5	Baltimore	-2.0
6	Memphis	-2.1
7	Cleveland	-2.2
8	Buffalo	-2.3
9	Boston	-2.4
10	Pittsburgh	-2.4
11	New York	-2.5
12	Richmond	-2.5
13	Hartford	-2.5
14	Philadelphia	-2.6
15	San Antonio	-2.6
16	Austin	-2.8
17	Milwaukee	-3.0
18	Dallas	-3.1
19	Kansas City	-3.1
20	**St. Louis**	**-3.3**
21	Houston	-3.4
22	Nashville	-3.4
23	Minneapolis	-3.5
24	Atlanta	-3.5
United States		**-3.5**
25	Chicago	-3.5
26	Providence	-3.5
27	Phoenix	-3.6
28	Raleigh	-3.7
29	Birmingham	-3.8
30	Portland	-3.8
31	Denver	-3.9
32	Indianapolis	-3.9
33	Salt Lake City	-4.0
34	Louisville	-4.0
35	Columbus	-4.2
36	Los Angeles	-4.2
37	San Diego	-4.3
38	Seattle	-4.4
39	Miami	-4.5
40	Cincinnati	-4.5
41	Jacksonville	-4.5
42	San Francisco	-4.7
43	Tampa	-5.0
44	Orlando	-5.2
45	Sacramento	-5.2
46	San Jose	-5.2
47	Detroit	-5.4
48	Riverside	-5.5
49	Charlotte	-5.7
50	**Las Vegas**	**-6.0**

Source: Bureau of Labor Statistics, Local Area Unemployment Statistics

Workforce

A region's workforce is one of the key determinants of economic vitality. The WWS tables in this section focus on employment rates and workforce composition. Another key component of the region's workforce is educational attainment. See page 59 and 61 for WWS tables on educational attainment levels.

The Employment to Population (E-P) ratio, also known as the employment rate, is the number of working age adults (aged 18-64) who are employed divided by the total working age population. The E-P ratio is a key indicator of labor market conditions because it reports on the employment status of the entire working age population. Unlike the unemployment rate, it does not exclude those who have stopped looking for work. Several Midwest regions are among the 10 regions with the highest E-P ratios, including Columbus, Milwaukee, Kansas City, and Minneapolis. In most of the peer regions a higher proportion of working age adults are employed than the national average, reflecting that much of the nation's economic activity is in metropolitan areas. Most of the 16 regions with E-P ratios lower than the national average are in the Sun Belt. St. Louis has a higher E-P ratio than most MSAs, ranking 17th out of 50 with 73.1 percent of the working age population employed in 2013.

There are 20 million working age adults in the United States with a disability, 34 percent of whom were employed in 2013. The employment rate for adults with disabilities is substantially lower than the employment rate for the general population. St. Louis ranks 31st on this measure, with about the same employment rate for adults with disabilities as the United States, 34 percent.

College educated young adults are a key cohort that many cities are interested in retaining and attracting. Educated young adults are the most mobile demographic, and it is thought that growth in this population can spur innovation, urban revitalization, and economic growth.[2] Nationwide the population of college educated young adults increased 13.6 percent in recent years, with 20 of the peer regions seeing higher increases than the nation. New Orleans had the largest increase (42 percent), reflecting its resurgence post-Katrina. San Antonio and Houston also saw large increases in college educated young adults. St. Louis had a higher rate than some of the fast-growing regions—Austin, Raleigh, and Charlotte—as well as some of the most populated regions—New York, Chicago, and Los Angeles. St. Louis has seen a larger increase in this key workforce cohort than all of the peer Midwest regions except Cleveland. In the 8-county East-West Gateway region the percentage of college educated young adults increased by 21.9 percent in recent years. Most of the increase was in the city of St. Louis, where the population of college educated young adults increased from 15,000 in 2006-2008 to 27,000 in 2011-2013.

The Social Science Research Council's Measure of America project has found that about one out of seven Americans between the ages of 16 and 24 is neither working nor in school,[3] and that the social costs are high: "As their peers lay the foundation for a productive, fulfilling adulthood, these disconnected youth find themselves at society's margins, unmoored from the structures that confer knowledge, skills, identity and purpose." Nine of the 10 regions with the largest proportions of disconnected youth are in the Sun Belt, with Detroit rounding out the list. The St. Louis MSA has a smaller proportion than the United States as well as most peer regions.[4]

Attracting foreign-born workers is viewed as a key way to increase employment and income in the St. Louis region.[5] Currently, the labor force of the region is comprised of a smaller proportion of foreign-born workers than most of the peer regions. St. Louis ranks 46th among the 48 peer regions, for which data are available, with 5.3 percent of the labor force born outside the United States.

Change in College Educated Young Adults by County
East-West Gateway Region, 2006-2008 to 2011-2013

Source: U.S. Census Bureau, American Community Survey 3-Year Estimates

2 Cortright, Joe, "The Young and the Restless and the Nation's Cities, City Report. Portland OR: City Observatory, October, 2014.

3 The Social Science Research Council counts unemployed youth as disconnected, whereas youth are counted as connected in the WWS table unless they have not worked in the last year.

4 Lewis, Kristen and Sarah Burd-Sharps, Halve the Gap by 2030, Measure of America of the Social Science Research Council, 2013.

5 Strauss, Jack, The Economic Impact of Immigration on St. Louis, April 2012.

Employment-Population Ratio

Ratio of employees aged 18-64 to total population aged 18- 64, 2013

1	**Minneapolis**	**79.5**
2	Washington, D.C.	76.9
3	Denver	75.9
4	Kansas City	75.9
5	Boston	75.7
6	Salt Lake City	75.5
7	Austin	75.5
8	Raleigh	74.4
9	Milwaukee	74.4
10	Baltimore	74.2
11	Columbus	74.2
12	Dallas	74.2
13	Hartford	73.5
14	Nashville	73.2
15	Seattle	73.2
16	Indianapolis	73.1
17	**St. Louis**	**73.1**
18	San Francisco	73.0
19	Richmond	73.0
20	Cincinnati	72.5
21	Oklahoma City	72.5
22	Pittsburgh	72.4
23	Louisville	72.4
24	San Jose	72.3
25	Charlotte	72.1
26	Houston	72.0
27	Portland	72.0
28	Virginia Beach	71.9
29	Cleveland	71.8
30	Chicago	71.7
31	Providence	71.6
32	Buffalo	71.3
33	San Antonio	70.9
34	Philadelphia	70.8
35	New York	70.5
36	Atlanta	70.3
United States		**70.2**
37	Orlando	70.2
38	Miami	70.0
39	Tampa	69.4
40	Phoenix	69.2
41	Las Vegas	69.1
42	Los Angeles	69.0
43	Memphis	68.8
44	Jacksonville	68.8
45	New Orleans	68.3
46	San Diego	68.1
47	Detroit	67.7
48	Birmingham	67.1
49	Sacramento	66.1
50	**Riverside**	**63.5**

Source: U.S. Census Bureau, American Community Survey 1-Year Estimates

Employment Rate for Adults with Disabilities

Percent of disabled adults aged 18-64, 2013

1	**Austin**	**47.0**
2	Minneapolis	45.5
3	Washington, D.C.	45.3
4	Salt Lake City	43.8
5	Denver	42.6
6	Dallas	41.1
7	Raleigh	40.7
8	Kansas City	40.5
9	Seattle	39.9
10	Las Vegas	39.8
11	Hartford	39.4
12	Boston	39.1
13	San Jose	38.9
14	San Antonio	38.7
15	Virginia Beach	38.4
16	Houston	38.3
17	San Francisco	37.9
18	Columbus	37.9
19	Milwaukee	37.2
20	Baltimore	36.8
21	Portland	36.8
22	Oklahoma City	36.7
23	Pittsburgh	36.3
24	Indianapolis	36.3
25	Chicago	36.0
26	Richmond	36.0
27	Atlanta	35.5
28	Phoenix	35.4
29	Charlotte	35.2
30	Jacksonville	35.2
31	**St. Louis**	**34.8**
32	Los Angeles	34.6
33	San Diego	34.6
34	Nashville	34.5
United States		**34.2**
35	Cleveland	34.1
36	Cincinnati	34.1
37	Orlando	33.8
38	New York	33.8
39	Louisville	33.4
40	Philadelphia	33.1
41	Buffalo	32.9
42	Memphis	32.6
43	New Orleans	32.4
44	Miami	32.4
45	Providence	31.6
46	Tampa	30.6
47	Sacramento	29.7
48	Riverside	29.2
49	Detroit	29.1
50	**Birmingham**	**28.5**

Source: U.S. Census Bureau, American Community Survey 1-Year Estimates

Change in College Educated Young Adults

Percent change in adults aged 25-34 with a bachelor's degree or higher, 2005-2009 to 2013

1	**New Orleans**	**42.3**
2	San Antonio	41.5
3	Houston	31.7
4	Nashville	26.6
5	Oklahoma City	26.4
6	Denver	23.6
7	Washington, D.C.	22.9
8	Hartford	22.1
9	Buffalo	20.6
10	Riverside	20.0
11	Virginia Beach	19.9
12	Pittsburgh	19.8
13	Cleveland	18.8
14	Seattle	18.2
15	Jacksonville	16.6
16	San Jose	15.9
17	**St. Louis**	**14.3**
18	Dallas	14.3
19	San Diego	14.2
20	Louisville	14.0
United States		**13.6**
21	Austin	13.5
22	Baltimore	13.4
23	New York	13.2
24	Charlotte	13.1
25	Salt Lake City	12.7
26	San Francisco	12.6
27	Milwaukee	12.4
28	Orlando	12.3
29	Boston	12.2
30	Philadelphia	12.0
31	Los Angeles	10.5
32	Tampa	9.2
33	Chicago	9.0
34	Minneapolis	9.0
35	Kansas City	7.0
36	Indianapolis	6.8
37	Portland	5.8
38	Richmond	5.7
39	Phoenix	5.4
40	Providence	5.2
41	Las Vegas	5.2
42	Raleigh	5.2
43	Birmingham	5.0
44	Miami	4.7
45	Columbus	4.4
46	Cincinnati	4.2
47	Sacramento	3.3
48	Memphis	2.8
49	Detroit	1.7
50	**Atlanta**	**-3.0**

Source: U.S. Census Bureau, American Community Survey 1-Year and 5-Year Estimates

Disconnected Youth

Youth aged 16-24 not in school and not working as a percent of all youth, 2009-2013 average

1	**Memphis**	**13.4**
2	Las Vegas	13.1
3	Riverside	12.9
4	Phoenix	12.8
5	Tampa	11.6
6	Detroit	11.5
7	Miami	11.5
8	Jacksonville	11.3
9	Atlanta	11.0
10	New Orleans	10.9
11	New York	10.6
12	Birmingham	10.6
13	Sacramento	10.2
14	Charlotte	10.1
15	Houston	9.9
16	Los Angeles	9.9
17	San Antonio	9.7
18	Philadelphia	9.5
United States		**9.4**
19	Chicago	9.4
20	Dallas	9.3
21	Orlando	9.3
22	Louisville	9.2
23	Indianapolis	9.2
24	Richmond	9.1
25	Baltimore	8.8
26	Portland	8.6
27	**St. Louis**	**8.6**
28	San Diego	8.5
29	Cleveland	8.1
30	Seattle	8.1
31	Milwaukee	8.0
32	Nashville	7.9
33	Virginia Beach	7.9
34	Columbus	7.8
35	San Francisco	7.7
36	Kansas City	7.7
37	Cincinnati	7.6
38	Providence	7.6
39	Denver	7.5
40	San Jose	7.4
41	Buffalo	7.3
42	Oklahoma City	7.2
43	Washington, D.C.	7.1
44	Salt Lake City	7.1
45	Austin	6.6
46	Hartford	6.6
47	Raleigh	6.6
48	Pittsburgh	6.4
49	Minneapolis	5.4
50	**Boston**	**5.3**

Source: U.S. Census Bureau, American Community Survey 5-Year Estimates, Public Use Microdata Sample

Foreign-Born Workers

Percent of all employed persons, 2013

1	**Miami**	**47.2**
2	San Jose	46.9
3	Los Angeles	41.8
4	New York	35.7
5	San Francisco	35.7
6	Houston	30.0
7	San Diego	29.3
8	Riverside	29.2
9	Las Vegas	28.5
10	Washington, D.C.	28.0
11	Sacramento	23.8
12	Dallas	23.1
13	Chicago	22.6
14	Seattle	20.8
15	Boston	20.5
16	Orlando	20.4
17	Austin	18.8
18	Phoenix	17.9
19	Atlanta	17.4
United States		**16.7**
20	Portland	16.0
21	Tampa	15.3
22	Raleigh	15.2
23	Hartford	15.2
24	Salt Lake City	15.0
25	San Antonio	14.7
26	Providence	14.6
27	Denver	14.3
28	Charlotte	13.1
29	Philadelphia	12.3
30	Baltimore	11.6
31	Minneapolis	11.3
32	Oklahoma City	11.2
33	Detroit	10.7
34	Jacksonville	10.3
35	New Orleans	10.1
36	Nashville	9.4
37	Richmond	9.0
38	Columbus	8.8
39	Milwaukee	8.2
40	Indianapolis	8.2
41	Virginia Beach	8.0
42	Kansas City	7.7
43	Memphis	7.0
44	Cleveland	6.4
45	Buffalo	5.5
46	**St. Louis**	**5.3**
47	Cincinnati	5.2
48	**Pittsburgh**	**4.3**

Source: U.S. Census Bureau, American Community Survey 2013 1-Year Estimates

Employment by Industry

Despite the decline in manufacturing employment in recent decades, manufacturing remains an important sector of the national and St. Louis regional economies. San Jose, with its concentration of high-tech companies, has joined traditional Rust Belt regions such as Milwaukee, Detroit, and Cleveland among the regions with the largest proportions of employment in the manufacturing sector. St. Louis ranks 19th among the peer regions with 8.6 percent of employment in manufacturing. The region has one of the lowest proportions among the Midwest peers but larger than most of the other peer regions. Boeing, the largest manufacturer in St. Louis, is also the second largest employer in the region, with about 15,000 workers.

Retail employs 10.6 percent of the workforce in the St. Louis region, placing St. Louis about in the middle of the peer regions. The three peer regions with the highest median household incomes have the smallest percentage of workers in retail, including San Jose; Washington, D.C.; and San Francisco.

The leisure and hospitality supersector includes the arts, entertainment, and recreation sector, as well as the accommodation and food services sector. Regions that rely most heavily on leisure and hospitality include familiar tourism magnets—Las Vegas, Orlando, and New Orleans. In St. Louis, with sports teams, cultural opportunities, and the iconic Arch, these sectors comprise a larger proportion of the workforce than is seen in most of the peer regions, employing just over 10 percent of workers.

The health care and social assistance sector employs more than one in seven workers in the St. Louis region. BJC HealthCare is the region's largest employer, with about 24,000 employees.

Not surprisingly, Washington, D.C. and state capitals dominate the top of the list. St. Louis ranks 41st among the peer regions with 12.1 percent of the workforce in the government sector.

The financial activities supersector includes finance and banking, insurance, and real estate. Hartford, which has a large insurance industry, ranks 1st among the peer regions with 10.1 percent of the workforce employed in financial businesses. New York, with Wall Street, ranks 7th among the peers with 8.3 percent of workers in the finance industry.

Employment (in thousands) by Industry
St. Louis MSA, 1990 to 2014

Industry	1990	2000	2010	2014
Health Care and Social Assistance	114.1	144.5	184.5	194.1
Government	138.1	162.4	167.9	158.5
Leisure and Hospitality	104.8	129.0	137.6	143.3
Retail Trade	141.1	145.4	136.6	139.9
Manufacturing	202.4	170.7	108.0	112.4
Administrative and Waste Services	50.0	71.2	75.1	85.9
Financial Activities	70.1	74.6	80.0	85.4
All Other Industries	357.1	429.2	391.7	394.6
Total Employment	**1,177.7**	**1,327.0**	**1,281.3**	**1,314.0**

Source: Bureau of Labor Statistics

Government Employment

Percent of total employment, 2014

1	**Sacramento**	**25.5**
2	Washington, D.C.	22.0
3	Virginia Beach	20.6
4	Oklahoma City	20.2
5	Austin	18.6
6	Riverside	17.8
7	Richmond	17.4
8	San Diego	17.2
9	San Antonio	17.1
10	Baltimore	17.1
11	Raleigh	16.8
12	Buffalo	16.1
13	Columbus	16.1
14	Birmingham	15.9
15	Salt Lake City	15.8
United States		**15.7**
16	Hartford	15.7
17	Seattle	14.4
18	Kansas City	14.3
19	New York	14.1
20	Denver	13.9
21	Charlotte	13.8
22	San Francisco	13.8
23	Portland	13.6
24	Memphis	13.6
25	New Orleans	13.1
26	Minneapolis	13.0
27	Cleveland	12.9
28	Atlanta	12.9
29	Indianapolis	12.9
30	Houston	12.8
31	Louisville	12.7
32	Nashville	12.7
33	Tampa	12.6
34	Phoenix	12.6
35	Providence	12.4
36	Cincinnati	12.4
37	Los Angeles	12.4
38	Miami	12.4
39	Dallas	12.3
40	Chicago	12.2
41	**St. Louis**	**12.1**
42	Philadelphia	12.0
43	Boston	12.0
44	Jacksonville	11.8
45	Las Vegas	10.9
46	Orlando	10.6
47	Milwaukee	10.3
48	Pittsburgh	10.1
49	Detroit	9.7
50	**San Jose**	**9.3**

Source: Bureau of Labor Statistics, Current Employment Statistics

Health and Social Assistance Employment

Percent of total employment, 2014

1	**Providence**	**17.4**
2	Philadelphia	16.7
3	Pittsburgh	16.3
4	Hartford	16.0
5	Cleveland	15.7
6	Milwaukee	15.3
7	New York	15.1
8	**St. Louis**	**14.8**
9	Baltimore	14.8
10	Detroit	14.2
11	Minneapolis	13.9
12	Los Angeles	13.8
13	Sacramento	13.7
14	Riverside	13.6
15	Buffalo	13.6
16	Cincinnati	13.5
17	San Antonio	13.3
United States		**13.0**
18	Oklahoma City	12.8
19	Richmond	12.7
20	Nashville	12.6
21	Indianapolis	12.5
22	Birmingham	12.4
23	Columbus	12.3
24	Kansas City	12.1
25	Phoenix	12.0
26	Portland	12.0
27	San Diego	11.6
28	Virginia Beach	11.5
29	New Orleans	10.8
30	San Jose	10.8
31	Denver	10.7
32	Dallas	10.6
33	Atlanta	10.3
34	Houston	10.2
35	Raleigh	10.2
36	Austin	9.9
37	Washington, D.C.	9.4
38	Charlotte	8.9
39	**Las Vegas**	**8.2**

Source: Bureau of Labor Statistics, Current Employment Statistics

Retail Employment

Percent of total employment, 2014

1	**Miami**	**13.3**
2	Riverside	13.1
3	Tampa	12.6
4	Orlando	12.5
5	Phoenix	12.0
6	Jacksonville	11.7
7	Las Vegas	11.6
8	Virginia Beach	11.4
9	Buffalo	11.4
10	Raleigh	11.3
11	Birmingham	11.3
12	San Antonio	11.2
13	Providence	11.2
14	Charlotte	11.2
15	Richmond	11.2
United States		**11.1**
16	New Orleans	11.1
17	Pittsburgh	10.9
18	Detroit	10.8
19	Atlanta	10.7
20	Sacramento	10.7
21	San Diego	10.7
22	Philadelphia	10.7
23	Oklahoma City	10.7
24	**St. Louis**	**10.6**
25	Austin	10.6
26	Seattle	10.6
27	Memphis	10.6
28	Salt Lake City	10.6
29	Nashville	10.5
30	Kansas City	10.5
31	Indianapolis	10.5
32	New York	10.4
33	Portland	10.4
34	Dallas	10.3
35	Baltimore	10.3
36	Chicago	10.2
37	Columbus	10.1
38	Hartford	10.1
39	Houston	10.1
40	Louisville	10.0
41	Cincinnati	10.0
42	Los Angeles	9.8
43	Denver	9.8
44	Cleveland	9.8
45	Minneapolis	9.6
46	Milwaukee	9.4
47	San Francisco	9.3
48	Washington, DC	8.7
49	**San Jose**	**8.6**

Source: Bureau of Labor Statistics, Current Employment Statistics

Leisure and Hospitality Employment

Percent of total employment, 2014

1	**Las Vegas**	**31.6**
2	Orlando	20.8
3	New Orleans	14.6
4	San Diego	13.1
5	San Antonio	12.5
6	Miami	12.2
7	Jacksonville	12.1
8	Austin	11.6
9	Tampa	11.5
10	Los Angeles	11.5
11	San Francisco	11.4
12	Providence	11.4
13	Virginia Beach	11.4
14	Riverside	11.2
15	Charlotte	11.2
16	Denver	11.0
17	Raleigh	10.9
18	**St. Louis**	**10.9**
19	Cincinnati	10.9
20	Nashville	10.8
21	Phoenix	10.8
22	Oklahoma City	10.6
United States		**10.6**
23	Memphis	10.5
24	Louisville	10.5
25	Buffalo	10.4
26	Atlanta	10.3
27	Sacramento	10.3
28	Indianapolis	10.2
29	Dallas	10.1
30	Portland	10.0
31	Kansas City	10.0
32	Pittsburgh	9.9
33	Columbus	9.9
34	Houston	9.8
35	Chicago	9.7
36	Seattle	9.7
37	Baltimore	9.6
38	Detroit	9.6
39	Boston	9.6
40	Washington, D.C.	9.6
41	Cleveland	9.5
42	Birmingham	9.3
43	Richmond	9.3
44	Minneapolis	9.2
45	New York	9.2
46	San Jose	9.1
47	Philadelphia	8.8
48	Milwaukee	8.8
49	Salt Lake City	8.4
50	**Hartford**	**8.3**

Source: Bureau of Labor Statistics, Current Employment Statistics

Manufacturing Employment

Percent of total employment, 2014

1	**San Jose**	**15.8**
2	Milwaukee	14.3
3	Detroit	12.6
4	Cleveland	12.0
5	Louisville	11.7
6	Portland	11.0
7	Cincinnati	10.5
8	Seattle	10.2
9	Minneapolis	10.1
10	Hartford	9.8
11	Buffalo	9.5
12	Charlotte	9.3
13	Los Angeles	9.2
14	Chicago	9.1
15	Providence	9.1
16	Indianapolis	9.0
17	Nashville	8.9
United States		**8.8**
18	Houston	8.7
19	**St. Louis**	**8.6**
20	Salt Lake City	8.3
21	Dallas	8.0
22	Pittsburgh	7.7
23	Birmingham	7.6
24	Boston	7.4
25	Virginia Beach	7.3
26	Memphis	7.3
27	San Diego	7.2
28	Kansas City	7.0
29	Riverside	7.0
30	Columbus	6.9
31	Philadelphia	6.5
32	Phoenix	6.4
33	Austin	6.3
34	Atlanta	6.1
35	Oklahoma City	6.1
36	Raleigh	5.6
37	San Francisco	5.5
38	New Orleans	5.5
39	Tampa	5.1
40	Richmond	4.9
41	Denver	4.9
42	San Antonio	4.9
43	Jacksonville	4.5
44	Baltimore	4.1
45	New York	4.1
46	Sacramento	3.9
47	Orlando	3.6
48	Miami	3.3
49	Las Vegas	2.4
50	**Washington, D.C.**	**1.6**

Source: Bureau of Labor Statistics, Current Employment Statistics

Financial Activities Employment

Percent of total employment, 2014

1	**Hartford**	**10.1**
2	Jacksonville	9.8
3	Phoenix	8.8
4	San Antonio	8.5
5	Tampa	8.5
6	Birmingham	8.3
7	New York	8.3
8	Dallas	8.1
9	Salt Lake City	7.8
10	Richmond	7.7
11	Minneapolis	7.7
12	Charlotte	7.6
13	Columbus	7.5
14	Philadelphia	7.3
15	Denver	7.3
16	Kansas City	7.2
17	Louisville	7.1
18	Miami	7.0
19	Boston	6.7
20	**St. Louis**	**6.5**
21	Chicago	6.4
22	Nashville	6.4
23	Cincinnati	6.4
24	Atlanta	6.4
25	Orlando	6.4
26	Cleveland	6.3
27	Milwaukee	6.2
28	Providence	6.2
29	Indianapolis	6.2
30	Pittsburgh	6.1
31	Portland	6.0
32	Buffalo	5.9
33	San Francisco	5.8
34	Baltimore	5.7
United States		**5.7**
35	Austin	5.7
36	Los Angeles	5.7
37	Detroit	5.5
38	Sacramento	5.5
39	Seattle	5.4
40	Oklahoma City	5.4
41	San Diego	5.2
42	Houston	5.1
43	Virginia Beach	5.0
44	New Orleans	5.0
45	Las Vegas	5.0
46	Raleigh	4.9
47	Washington, D.C.	4.9
48	Memphis	4.5
49	San Jose	3.5
50	**Riverside**	**3.3**

Source: Bureau of Labor Statistics, Current Employment Statistics

Change in Employment by Industry

The tables in this section show the growth in employment for six key industries over the time period 2010 to 2014, showing how employment in these industries has recovered from the recession up to this point. Over the four-year period, most of the peer regions have seen growth in these sectors with the exception of government employment which has continued to decline in 36 of the regions.

Manufacturing employment increased by 5.7 percent in the United States from 2010 to 2014. Detroit, which had lost over half of its manufacturing employment from 2000 to 2010, had a strong rebound in recent years, with the largest percentage growth (28.2 percent) as well as the largest absolute growth (52,500 jobs) among the peer regions. Manufacturing employment in the St. Louis region increased 4.1 percent, adding an estimated 4,400 jobs. Nine of the peer regions, including New York and Philadelphia, continued to see declines in manufacturing employment from 2010 to 2014.

Nationally, government employment at the federal, state, and local levels declined by nearly 3 percent since 2010. Federal employment accounted for most of the decrease with a decline of nearly 9 percent. State and local government employment each fell by about 2 percent. St. Louis experienced one of the largest percentage decreases in government employment among the peers with a decrease of 5.6 percent, a reduction of 9,400 jobs. Almost half of these (4,200) were state level jobs and about 2,500 each were federal and local level jobs.

Much of the growth in financial services since the depths of the recession has been in Sun Belt regions such as Austin, Phoenix, and Tampa. Traditional financial hubs, such as New York, have seen more modest gains, while Boston and Hartford lost jobs in financial services. St. Louis is about in the middle among the peer regions with a 6.8 percent increase, higher than the national increase of 3.7 percent. Regions that have seen the greatest increase in the financial services sector include MSAs that have not traditionally been considered leaders in finance, such as Austin, San Antonio, and Nashville. This could be due to increases in home buying and building that are reviving the mortgage industry in these areas.

Leisure and hospitality had the largest increase in employment among the six key industries nationwide, growing by 12.7 percent from 2010 to 2014. St. Louis had the second lowest increase in leisure and hospitality employment among the peer regions, rising by 4.1 percent. Regions in the Midwest had some of the lowest increases in employment in this industry.

St. Louis ranks 34th, out of the 39 regions for which data are available, on employment change in the health care and social assistance industry. About 9,600 jobs were added in this industry in St. Louis, for an increase of 5.2 percent.

Change in Government Employment

Percent change, 2010-2014

1	**Salt Lake City**	**8.7**
2	Denver	4.5
3	Charlotte	3.3
4	Oklahoma City	2.3
5	Louisville	2.2
6	Boston	1.8
7	Orlando	1.6
8	Minneapolis	1.4
9	Dallas	1.0
10	San Diego	0.6
11	San Antonio	0.4
12	Seattle	0.3
13	Raleigh	0.1
14	San Francisco	0.0
15	Hartford	-0.2
16	Austin	-0.2
17	Las Vegas	-0.4
18	Nashville	-0.5
19	Phoenix	-0.8
20	Washington, D.C.	-0.8
21	Portland	-0.8
22	Houston	-0.8
23	Providence	-0.8
24	San Jose	-0.8
25	Richmond	-1.3
26	Sacramento	-1.3
27	Tampa	-1.5
28	Baltimore	-1.6
29	Columbus	-1.7
30	Indianapolis	-1.8
31	Cincinnati	-2.3
32	Riverside	-2.3
33	Virginia Beach	-2.6
United States		**-2.8**
34	Chicago	-3.1
35	Los Angeles	-3.2
36	Atlanta	-3.2
37	Kansas City	-3.4
38	Cleveland	-3.4
39	Milwaukee	-3.4
40	Birmingham	-3.6
41	New York	-3.7
42	Miami	-4.0
43	Jacksonville	-4.4
44	Memphis	-5.4
45	**St. Louis**	**-5.6**
46	Buffalo	-6.2
47	Philadelphia	-6.4
48	Pittsburgh	-8.0
49	Detroit	-11.4
50	**New Orleans**	**-11.7**

Source: Bureau of Labor Statistics, Current Employment Statistics

Change in Health Care and Social Assistance Employment

Percent change, 2010-2014

1	**Riverside**	**26.4**
2	San Jose	23.0
3	Atlanta	18.6
4	Denver	18.5
5	Sacramento	18.3
6	Austin	18.3
7	Los Angeles	18.2
8	San Diego	16.6
9	Columbus	15.2
10	Las Vegas	15.1
11	Phoenix	13.3
12	Dallas	13.3
13	Minneapolis	12.7
14	Houston	11.9
15	Virginia Beach	11.4
16	Nashville	11.0
17	San Antonio	10.6
18	Kansas City	10.4
19	New Orleans	9.9
20	Raleigh	9.8
21	Washington, D.C.	9.3
22	Richmond	9.3
23	Indianapolis	9.2
24	Portland	9.1
25	New York	8.1
United States		**7.9**
26	Philadelphia	7.9
27	Cincinnati	7.8
28	Baltimore	7.6
29	Charlotte	7.4
30	Milwaukee	7.3
31	Detroit	6.5
32	Birmingham	6.4
33	Oklahoma City	6.0
34	**St. Louis**	**5.2**
35	Cleveland	4.5
36	Hartford	4.4
37	Pittsburgh	4.1
38	Providence	4.0
39	**Buffalo**	**2.3**

Source: Bureau of Labor Statistics, Current Employment Statistics

Change in Retail Employment

Percent change, 2010-2014

1	**Orlando**	**17.2**
2	Austin	16.8
3	Seattle	16.3
4	Miami	13.6
5	Raleigh	11.6
6	San Antonio	11.4
7	Houston	11.4
8	Las Vegas	11.2
9	Charlotte	10.9
10	Dallas	10.8
11	San Diego	10.3
12	Salt Lake City	10.2
13	Tampa	10.2
14	Richmond	10.2
15	Portland	10.0
16	Oklahoma City	9.5
17	Indianapolis	9.4
18	San Francisco	9.2
19	New York	8.9
20	Atlanta	8.9
21	San Jose	8.9
22	New Orleans	8.9
23	Sacramento	8.6
24	Denver	8.6
25	Riverside	8.5
26	Phoenix	7.5
27	Los Angeles	6.7
28	Nashville	6.5
United States		**6.4**
29	Jacksonville	6.3
30	Louisville	6.1
31	Washington, D.C.	5.8
32	Minneapolis	5.8
33	Detroit	5.6
34	Hartford	5.0
35	Chicago	4.7
36	Kansas City	4.7
37	Baltimore	4.7
38	Columbus	4.5
39	Milwaukee	4.1
40	Buffalo	3.5
41	Philadelphia	2.7
42	Cincinnati	2.5
43	**St. Louis**	**2.4**
44	Virginia Beach	2.4
45	Birmingham	2.1
46	Providence	2.1
47	Cleveland	1.1
48	Memphis	0.8
49	**Pittsburgh**	**0.7**

Source: Bureau of Labor Statistics, Current Employment Statistics

Change in Leisure and Hospitality Employment

Percent change, 2010-2014

1	**Austin**	**24.4**
2	San Jose	22.6
3	Houston	21.5
4	Raleigh	21.2
5	San Francisco	19.8
6	Nashville	19.2
7	Los Angeles	18.9
8	New York	18.7
9	Orlando	18.2
10	New Orleans	17.9
11	Miami	17.8
12	Riverside	17.5
13	Charlotte	17.2
14	Dallas	17.1
15	Atlanta	16.6
16	Jacksonville	16.3
17	San Antonio	16.1
18	Denver	15.9
19	Baltimore	15.2
20	Richmond	15.1
21	Phoenix	14.9
22	Sacramento	14.6
23	San Diego	14.4
24	Washington, D.C.	14.4
25	Tampa	14.4
26	Columbus	14.3
27	Seattle	14.2
28	Salt Lake City	14.2
29	Oklahoma City	13.7
30	Portland	13.6
31	Cleveland	13.6
32	Hartford	12.9
33	Boston	12.8
United States		**12.7**
34	Birmingham	12.2
35	Louisville	11.7
36	Cincinnati	11.1
37	Minneapolis	10.5
38	Kansas City	10.4
39	Indianapolis	10.4
40	Las Vegas	10.1
41	Chicago	10.0
42	Philadelphia	9.9
43	Providence	9.7
44	Buffalo	9.5
45	Milwaukee	9.0
46	Pittsburgh	6.4
47	Detroit	6.2
48	**St. Louis**	**4.1**
49	Virginia Beach	2.5
50	**Memphis**	**-0.3**

Source: Bureau of Labor Statistics, Current Employment Statistics

Change in Manufacturing Employment

Percent change, 2010-2014

1	**Detroit**	**28.2**
2	Nashville	23.5
3	Louisville	20.9
4	Oklahoma City	20.6
5	Houston	18.1
6	Seattle	12.3
7	Birmingham	11.5
8	Portland	9.9
9	Austin	9.3
10	Charlotte	8.9
11	Las Vegas	8.2
12	Minneapolis	7.9
13	Columbus	7.4
14	Denver	6.7
15	Phoenix	6.7
16	Milwaukee	6.6
17	Cleveland	6.4
18	Atlanta	6.4
19	Miami	6.3
20	Cincinnati	6.1
21	Sacramento	6.1
22	Riverside	5.9
23	Virginia Beach	5.8
United States		**5.7**
24	Buffalo	5.4
25	Tampa	5.2
26	San Jose	5.0
27	Salt Lake City	4.8
28	San Francisco	4.6
29	Raleigh	4.3
30	Indianapolis	4.2
31	**St. Louis**	**4.1**
32	San Antonio	4.1
33	Orlando	3.9
34	San Diego	3.5
35	Dallas	3.0
36	Kansas City	2.0
37	Pittsburgh	1.8
38	Providence	1.6
39	Chicago	1.3
40	Jacksonville	1.1
41	Los Angeles	0.0
42	Memphis	-0.7
43	Boston	-1.2
44	Richmond	-1.9
45	Hartford	-2.5
46	New York	-3.3
47	Philadelphia	-4.1
48	Washington, D.C.	-6.2
49	New Orleans	-11.2
50	**Baltimore**	**-11.8**

Source: Bureau of Labor Statistics, Current Employment Statistics

Change in Financial Activities Employment

Percent change, 2010-2014

1	**Austin**	**19.8**
2	San Antonio	18.3
3	Nashville	16.1
4	Phoenix	15.3
5	Tampa	14.4
6	Richmond	14.4
7	Dallas	13.5
8	San Jose	12.9
9	Salt Lake City	11.2
10	Louisville	10.9
11	Miami	10.2
12	Detroit	9.9
13	Jacksonville	9.9
14	Columbus	9.4
15	Las Vegas	9.0
16	Orlando	8.8
17	Charlotte	8.6
18	Seattle	7.6
19	Denver	7.5
20	Atlanta	7.4
21	New Orleans	7.3
22	Houston	7.1
23	Birmingham	7.1
24	Buffalo	6.9
25	Cincinnati	6.9
26	Oklahoma City	6.8
27	**St. Louis**	**6.8**
28	Providence	5.1
29	San Diego	4.9
30	San Francisco	4.7
31	Baltimore	4.5
32	Minneapolis	4.3
33	Riverside	4.1
34	Portland	3.9
United States		**3.7**
35	Pittsburgh	3.5
36	Los Angeles	3.4
37	Virginia Beach	3.3
38	Kansas City	3.1
39	Raleigh	3.0
40	Washington, D.C.	2.9
41	Indianapolis	2.3
42	New York	2.1
43	Philadelphia	1.6
44	Sacramento	0.8
45	Cleveland	0.5
46	Chicago	0.2
47	Boston	-0.7
48	Milwaukee	-3.7
49	Memphis	-5.2
50	**Hartford**	**-8.5**

Source: Bureau of Labor Statistics, Current Employment Statistics

Freight and Exports

Projections by the Federal Highway Administration indicate that freight traffic in the United States could grow by 60 percent in the next quarter century.[6] According to the St. Louis Regional Freight Study, the region has numerous assets to help it take advantage of this increase, with infrastructure and geography important to the freight industry, including:

- St. Louis is the northernmost port on the Mississippi River that is free of canal locks and is ice-free all year.
- St. Louis is the third largest rail hub in the United States.
- Lambert Airport and Mid-America Airport have significant unused capacity that could serve additional freight movement.
- Four major interstates converge on St. Louis, and have relatively low levels of congestion.
- The region's central location in North America makes it within a one day truck drive to 30 percent of the population in the United States, including Chicago, Atlanta, Dallas, Minneapolis, and New Orleans.

The Freight Study concluded that with better coordination and management of assets, St. Louis would be poised to expand its role in the field of freight and logistics. To that end, The Regional Freight District was recently formed to promote the region as a multimodal freight center and to coordinate infrastructure investments.

Among non-coastal regions, St. Louis is one of the leading exporters. Ranking 21st among the peer regions, St. Louis firms exported an estimated $12.4 billion of goods in 2013, including about $1.8 billion each to Canada and Mexico, and $1.6 billion to China. Chemical manufacturing and food manufacturing industries exported the greatest value of goods, each of which sold more than $1 billion abroad.

The Federal Highway Administration's Freight Analysis Framework (FAF) provides estimates of freight imported, exported, or shipped within regions. According to FAF, St. Louis is one of the leading regions for freight movement, particularly when excluding regions with ports on oceans or Great Lakes. Among the peer regions St. Louis ranks 11th with 341 million tons of freight movement in 2012.

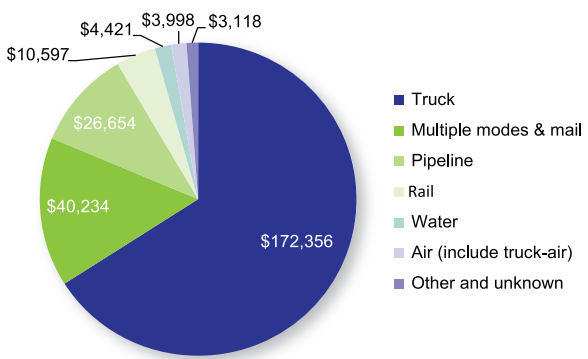
When the value of the commodities being moved is considered, St. Louis ranks 16th among the peers with $261 billion worth of freight moving inbound, outbound, and within the region. The commodities that comprise the largest proportions of the value of freight moved are pharmaceuticals, motorized vehicles, and machinery.

With a majority (66 percent) of freight moving by truck in the St. Louis region, the cost of congestion is important. St. Louis ranks 19th among the peer regions with an estimated $300 million in lost time and fuel costs to trucking firms. However, among the regions moving the most freight tonnage, St. Louis is comparatively low with annual congestion costs less than half of those in Houston or Atlanta, a sixth of those in Chicago, and less than an eighth of those in New York.

"Freight and transportation are intertwined, and it is the St. Louis area's continued investment in the already top-notch transportation system, that will bring continued growth to the region."

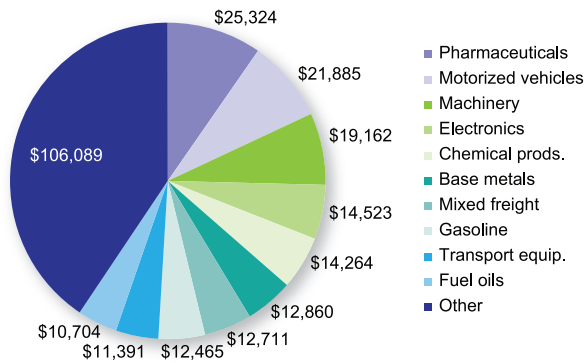
~ Dennis Wilmsmeyer, America's Central Port

Value (in millions) of Freight by Mode
St. Louis Combined Statistical Area, 2012



Source: Federal Highway Administration, Freight Analysis Framework, 2012

Top 10 Freight Commodities by Value (in millions)
St. Louis Combined Statistical Area, 2012



Source: Federal Highway Administration, Freight Analysis Framework, 2012

6 St. Louis Regional Freight Study. June 2013, accessed on 16 June 2015 at http://www.ewgateway.org/pdffiles/library/trans/freight/FreightStudyFinalRpt.pdf

Foreign Exports

In billions of dollars, 2013

1	**Houston**	**115.0**
2	New York	106.9
3	Los Angeles	76.3
4	Seattle	56.7
5	Detroit	53.9
6	Chicago	44.9
7	Miami	41.8
8	New Orleans	30.0
9	Dallas	27.6
10	San Francisco	25.3
11	Philadelphia	24.9
12	Minneapolis	23.7
13	San Jose	23.4
14	Boston	22.2
15	Cincinnati	21.0
Peer Average		**19.9**
16	San Antonio	19.3
17	Atlanta	18.8
18	San Diego	17.9
19	Portland	17.6
20	Washington, D.C.	16.2
21	**St. Louis**	**12.4**
22	Salt Lake City	11.9
23	Phoenix	11.5
24	Memphis	11.3
25	Cleveland	11.1
26	Charlotte	10.7
27	Pittsburgh	10.4
28	Hartford	10.2
29	Indianapolis	9.7
30	Riverside	9.6
31	Louisville	8.9
32	Milwaukee	8.9
33	Austin	8.9
34	Nashville	8.7
35	Kansas City	8.0
36	Tampa	6.7
37	Providence	6.6
38	Baltimore	5.9
39	Sacramento	5.8
40	Columbus	5.7
41	Buffalo	4.4
42	Richmond	4.3
43	Denver	3.6
44	Orlando	3.2
45	Virginia Beach	2.5
46	Jacksonville	2.5
47	Raleigh	2.3
48	Las Vegas	2.0
49	Birmingham	1.9
50	**Oklahoma City**	**1.6**

Source: International Trade Administration

Freight Tonnage

Amount of freight imported to, exported from, or shipped within the region in thousands of tons, 2012

1	**Houston**	**1,114,885**
2	Los Angeles	892,421
3	New York	864,781
4	Chicago	799,804
5	New Orleans	490,251
6	San Francisco	488,382
7	Dallas	435,366
8	Philadelphia	435,353
9	Detroit	375,677
10	Atlanta	372,690
11	**St. Louis**	**341,863**
12	Seattle	320,076
13	Minneapolis	318,213
14	Miami	299,080
Peer Average		**269,456**
15	Boston	232,927
16	Phoenix	222,524
17	Tampa	218,062
18	Washington, D.C.	215,935
19	Portland	210,859
20	Indianapolis	203,196
21	Pittsburgh	196,983
22	Cleveland	195,675
23	Denver	193,525
24	San Antonio	188,719
25	Kansas City	188,285
26	Baltimore	175,626
27	Nashville	172,260
28	Cincinnati	167,571
29	Orlando	163,412
30	Birmingham	159,204
31	Columbus	157,224
32	Salt Lake City	149,109
33	Sacramento	143,508
34	Virginia Beach	141,427
35	Charlotte	138,952
36	Buffalo	122,765
37	Richmond	120,824
38	Austin	116,397
39	Milwaukee	115,183
40	Louisville	114,738
41	Jacksonville	114,607
42	San Diego	107,454
43	Oklahoma City	104,850
44	Raleigh	104,297
45	Memphis	100,716
46	Las Vegas	96,329
47	**Hartford**	**62,449**

Source: Federal Highway Administration, Freight Analysis Framework

Freight Value

Value of freight imported to, exported from, or shipped within the region in millions of dollars, 2012

1	**Los Angeles**	**1,672,480**
2	New York	1,636,919
3	Chicago	1,033,547
4	Houston	938,087
5	San Francisco	650,875
6	Dallas	646,925
7	Detroit	644,693
8	Atlanta	522,344
9	Philadelphia	511,255
10	Seattle	418,813
11	Miami	399,796
12	Boston	362,557
Peer Average		**339,549**
13	Memphis	332,528
14	Minneapolis	318,245
15	Phoenix	286,583
16	**St. Louis**	**261,378**
17	Washington, D.C.	251,975
18	Baltimore	242,592
19	New Orleans	239,398
20	Cleveland	238,183
21	San Diego	236,018
22	Columbus	233,718
23	Indianapolis	215,029
24	Denver	213,694
25	Portland	201,920
26	Kansas City	199,905
27	Pittsburgh	195,790
28	Charlotte	195,347
29	Buffalo	188,095
30	Cincinnati	177,300
31	Salt Lake City	169,972
32	San Antonio	168,855
33	Nashville	164,287
34	Louisville	163,715
35	Milwaukee	161,317
36	Tampa	160,396
37	Orlando	153,198
38	Sacramento	151,269
39	Virginia Beach	146,168
40	Jacksonville	122,599
41	Hartford	121,612
42	Raleigh	115,523
43	Richmond	105,018
44	Austin	104,722
45	Birmingham	98,117
46	Oklahoma City	94,730
47	**Las Vegas**	**91,298**

Source: Federal Highway Administration, Freight Analysis Framework

Truck Congestion Costs

Value of lost time and excess fuel consumption in millions of dollars, 2011

1	**New York**	**2,541**
2	Los Angeles	2,290
3	Chicago	1,716
4	Atlanta	775
5	Miami	739
6	Dallas	734
7	Philadelphia	730
8	Washington, D.C.	656
9	Houston	646
10	San Francisco	643
11	Phoenix	627
12	Boston	561
13	Seattle	546
14	Detroit	475
Peer Average		**400**
15	Baltimore	379
16	Denver	316
17	San Diego	314
18	Riverside	310
19	**St. Louis**	**300**
20	Orlando	248
21	Tampa	246
22	Portland	244
23	Indianapolis	241
24	Minneapolis	232
25	Cincinnati	230
26	Pittsburgh	213
27	Nashville	199
28	Sacramento	172
29	Charlotte	168
30	Austin	157
31	Memphis	153
31	San Jose	153
33	Kansas City	148
34	Columbus	145
34	Louisville	145
36	San Antonio	139
37	Las Vegas	137
38	Milwaukee	131
38	Virginia Beach	131
40	Cleveland	130
41	New Orleans	127
42	Oklahoma City	115
43	Birmingham	107
44	Jacksonville	103
45	Buffalo	102
46	Raleigh	96
47	Hartford	75
48	Salt Lake City	71
49	Providence	69
50	**Richmond**	**62**

Source: Texas Transportation Institute, Urban Mobility Report

Innovation

From new technologies that make our daily lives more fun and convenient to medical advances that enable people to live longer, healthier lives, innovation is continually changing the world in which we live. Innovation is also considered a primary driver of economic growth—increasing hourly wages, efficiency, and productivity. Innovation in the St. Louis region is propelled by numerous institutions, including four major research universities, the Danforth Plant Science Center, innovation incubators such as CORTEX and T-REX, and companies such as Monsanto and Boeing.

Research indicates that regions generating more patents have higher GDP per worker than regions with average or low patent generation.[7] Regions with the highest number of patents per worker tend to have strong technology sectors. San Jose, home to Silicon Valley, has far more patents than any of the other regions with 127 patents per 10,000 employees in 2013. Austin, ranking 4th, rose to technological prominence in the 1980s as home to the Microelectronics and Computer Technology Corporation, a major research and development consortium. Ranking 5th, 6th, 7th, and 9th, respectively - Raleigh is home to the Research Triangle Park, Seattle to Microsoft, Boston to the Route 128 corridor, and Portland to Intel. St. Louis ranks 30th with 6.2 patents per 10,000 employees in 2013. Since 2005 Boeing and Monsanto have been the top patenting companies in the region.

Entrepreneurship is another factor that drives innovation in an economy. Small Business Firms, Business Startups, and Venture Capital are measures that indicate the support for business creation in communities. The St. Louis region ranks in the middle of the peer regions on all three of these measures.

Some of the most populated regions, including New York, Los Angeles, Chicago, and Miami have the largest percentages of small businesses. Regions with the largest rates of business startups tend to have large immigrant populations, such as Miami, New York, and Los Angeles. Immigrants are almost twice as likely as native born Americans to start a business.[8]

Venture Capital is funding provided to entrepreneurial companies that are typically young and have the potential for rapid growth. San Francisco and San Jose rank 1st and 2nd on the amount of venture capital invested relative to the number of employees in the region. St. Louis ranks 28th with $95 per employee, a total of $124 million invested.

Innovation often relies on the expertise of people with science, technology, engineering, and math (STEM) skills. In 2011, STEM employment comprised 20 percent of all jobs in the United States, half of which do not require a four-year college degree yet pay an average of $53,000 per year.[9] It is little surprise that San Jose again ranks 1st among the peer regions. Washington, D.C., with an abundance of defense contractors and federal science facilities, ranks 2nd. St. Louis has 275,000 jobs in these fields, comprising 22 percent of total employment and ranking 14th among the peer regions.

The rapid expansion of broadband Internet over the last 15 years has brought about an abundance of innovations that fundamentally change the way we live, work, learn, and communicate. Further increases in the speed and quality of Internet networks are expected to drive innovation by improving incentives for entrepreneurs to innovate.[10] With the bar for what constitutes "high speed" Internet continually rising, the High Speed Internet table measures the percentage of households where download speeds of over one gigabit per second are available. Technology hub San Jose ranks 48th on this measure, although it fares better on rankings for slightly lower download speeds. St. Louis ranks about in the middle of the peer regions with about 8 percent of residents having access to high-speed Internet, not far below Kansas City with its Google fiber initiative.

"In order to foster a culture of innovation that improves our ability to learn, our quality of life, and our regional economy, our schools, homes, and businesses need access to high-speed Internet."

~ Teresa Martinez, Nine Network of Public Media

7 Friedhoff, Alec and Christopher Ingraham, Patenting and Innovation in Metropolitan America, Brookings, 1 February 2013.

8 Fairlie, Robert, Arnobio Morelix, E.J. Reedy, Joshua Russell, The Kauffman Index: Startup Activity / National Trends, Ewing Marion Kauffman Foundation, 2015.

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10 Connecting America: The National Broadband Plan, Federal Communications Commission, 2010.

Patents

Utility patents granted per 10,000 employees, 2013

1	**San Jose**	**127.3**
2	San Francisco	39.0
3	San Diego	32.2
4	Austin	29.6
5	Raleigh	24.1
6	Seattle	23.1
7	Boston	21.4
8	Minneapolis	18.1
9	Portland	17.6
10	Detroit	15.8
11	Hartford	10.9
12	Los Angeles	10.6
13	Cincinnati	9.9
14	New York	9.5
United States		**9.4**
15	Philadelphia	9.2
16	Houston	9.1
17	Atlanta	9.1
18	Dallas	9.0
19	Kansas City	8.8
20	Phoenix	8.3
21	Cleveland	8.2
22	Chicago	8.2
23	Salt Lake City	8.2
24	Denver	7.8
25	Pittsburgh	7.6
26	Milwaukee	7.5
27	Providence	7.2
28	Indianapolis	7.0
29	Washington, D.C.	6.7
30	**St. Louis**	**6.2**
31	Columbus	5.7
32	Baltimore	5.6
33	Miami	5.6
34	Sacramento	5.4
35	Buffalo	5.3
36	Charlotte	5.0
37	Memphis	5.0
38	Tampa	4.9
39	Las Vegas	4.7
40	San Antonio	4.6
41	Orlando	3.7
42	Louisville	3.7
43	Richmond	3.6
44	Riverside	3.5
45	Nashville	2.8
46	Jacksonville	2.7
47	Oklahoma City	2.4
48	New Orleans	2.3
49	Birmingham	1.8
50	**Virginia Beach**	**1.7**

Source: U.S. Patent and Trademark Office; Bureau of Economic Analysis

Small Business Firms

Firms with 1-49 employees as a percent of all firms, 2012

United States		**95.7**
1	New York	95.1
2	Miami	94.8
3	Los Angeles	93.6
4	Chicago	92.0
5	Tampa	91.6
6	San Francisco	91.3
7	Philadelphia	91.3
8	Seattle	91.3
9	Detroit	91.2
10	Boston	91.1
11	Providence	90.8
12	San Diego	90.8
13	Atlanta	90.6
14	Washington, D.C.	90.5
15	Portland	90.4
16	Orlando	90.2
17	Houston	90.1
18	Riverside	90.0
19	Minneapolis	89.9
20	Dallas	89.8
21	Denver	89.6
22	**St. Louis**	**89.6**
23	Baltimore	89.6
24	Pittsburgh	89.4
25	San Jose	89.3
26	Sacramento	89.2
27	Phoenix	89.1
28	Cleveland	88.8
29	Oklahoma City	88.7
30	Buffalo	88.5
31	Virginia Beach	88.3
32	Kansas City	88.0
33	Jacksonville	87.7
34	Austin	87.5
35	Richmond	87.4
36	New Orleans	87.4
37	Salt Lake City	87.2
38	Hartford	87.1
39	Las Vegas	86.8
40	Cincinnati	86.8
41	Raleigh	86.8
42	Milwaukee	86.7
43	San Antonio	86.7
44	Charlotte	86.5
45	Indianapolis	86.3
46	Nashville	86.1
47	Louisville	86.1
48	Columbus	86.0
49	Birmingham	85.8
50	**Memphis**	**83.2**

Source: Business Dynamics Statistics

Business Startups

New firms with 1-49 employees per 100,000 residents, 2012

1	**Miami**	**245.3**
2	New York	196.2
3	Orlando	194.6
4	Austin	179.7
5	Denver	176.8
6	Salt Lake City	175.7
7	Tampa	173.6
8	Los Angeles	169.1
9	Seattle	167.5
10	San Jose	167.0
11	Portland	164.9
12	San Francisco	160.8
13	Las Vegas	157.4
14	Raleigh	156.5
15	Jacksonville	155.6
16	Atlanta	153.6
17	San Diego	153.5
18	Charlotte	149.8
19	Oklahoma City	147.4
20	Dallas	141.5
21	Chicago	140.0
22	Kansas City	136.6
23	Houston	135.6
24	Boston	135.1
25	Washington, D.C.	132.9
26	Minneapolis	131.4
27	Nashville	131.4
United States		**130.0**
28	New Orleans	126.8
29	Phoenix	126.2
30	**St. Louis**	**125.9**
31	Sacramento	125.6
32	Richmond	124.3
33	Philadelphia	123.2
34	Detroit	122.5
35	Indianapolis	121.0
36	Providence	118.2
37	Baltimore	118.0
38	San Antonio	110.6
39	Buffalo	110.3
40	Birmingham	106.9
41	Virginia Beach	106.5
42	Cleveland	105.2
43	Columbus	102.9
44	Louisville	100.9
45	Milwaukee	100.6
46	Riverside	99.1
47	Pittsburgh	97.8
48	Hartford	96.4
49	Cincinnati	93.1
50	**Memphis**	**84.4**

Source: Business Dynamics Statistics; U.S. Census Bureau, Population Estimates

Venture Capital

Venture capital investment per employee in dollars, 2014

1	**San Francisco**	**8,002**
2	San Jose	6,894
3	Boston	1,745
4	Austin	673
5	Seattle	608
6	San Diego	599
7	New York	511
8	Los Angeles	461
9	Denver	363
United States		**357**
10	Pittsburgh	291
11	Providence	291
12	Miami	290
13	Washington, D.C.	275
14	Salt Lake City	274
15	Chicago	237
16	Atlanta	196
17	Minneapolis	189
18	Philadelphia	163
19	Portland	159
20	Nashville	145
21	Houston	139
22	Phoenix	131
23	Cincinnati	131
24	Baltimore	128
25	Sacramento	128
26	Raleigh	125
27	San Antonio	116
28	**St. Louis**	**95**
29	Orlando	94
30	Cleveland	92
31	Kansas City	90
32	Dallas	87
33	New Orleans	75
34	Louisville	73
35	Detroit	58
36	Hartford	55
37	Las Vegas	43
38	Indianapolis	41
39	Tampa	34
40	Richmond	30
41	Oklahoma City	18
42	Virginia Beach	17
43	Charlotte	17
44	Columbus	15
45	Memphis	13
46	Milwaukee	9
47	Buffalo	6
48	Birmingham	2
49	Riverside	1
50	**Jacksonville**	**0**

Source: PricewaterhouseCoopers/ National Venture Capital Association MoneyTree™ Report with data by Thomson Reuters; Bureau of Labor Statistics, Current Employment Statistics

STEM Employment

Jobs requiring knowledge of science, technology, engineering, or math as a percent of all jobs, 2011

1	**San Jose**	**33.2**
2	Washington, D.C.	27.1
3	Seattle	25.9
4	Boston	23.9
5	San Francisco	23.9
6	Baltimore	23.1
7	Detroit	22.9
8	Hartford	22.8
9	Houston	22.8
10	Austin	22.7
11	San Diego	22.6
12	Raleigh	22.5
13	Denver	22.4
14	**St. Louis**	**22.0**
15	Minneapolis	21.8
16	Virginia Beach	21.6
17	Milwaukee	21.4
18	Cleveland	21.3
19	Indianapolis	21.2
20	Portland	21.0
21	Richmond	20.9
22	Pittsburgh	20.8
23	Sacramento	20.8
24	Columbus	20.7
25	Philadelphia	20.7
26	Birmingham	20.7
27	Cincinnati	20.6
28	Kansas City	20.4
29	Dallas	20.4
30	Charlotte	20.3
31	Salt Lake City	20.1
United States		**20.1**
32	New Orleans	19.9
33	Phoenix	19.9
34	Oklahoma City	19.7
35	Louisville	19.5
36	Chicago	19.5
37	Atlanta	19.4
38	Jacksonville	19.3
39	Tampa	19.2
40	Los Angeles	19.1
41	New York	18.9
42	Providence	18.7
43	Buffalo	18.5
44	San Antonio	18.4
45	Nashville	18.0
46	Miami	17.9
47	Orlando	17.2
48	Memphis	16.7
49	Riverside	15.4
50	**Las Vegas**	**12.8**

Source: Brookings, Metropolitan Policy Program

High Speed Internet

Population with Internet service available at download speeds >1 gigabit per second as a percent of total population, 2014

1	**Providence**	**64.2**
2	Indianapolis	50.7
3	Portland	46.2
4	Salt Lake City	40.6
5	Miami	21.0
6	Boston	15.8
7	Atlanta	15.5
8	Nashville	14.1
9	Chicago	14.0
10	Raleigh	12.5
11	Charlotte	10.4
11	Jacksonville	10.4
13	Kansas City	10.2
14	Seattle	10.1
15	Memphis	9.5
16	Orlando	8.3
17	Las Vegas	8.3
18	**St. Louis**	**8.3**
United States		**8.0**
19	Washington, D.C.	7.3
20	New York	7.1
21	Buffalo	6.6
22	Louisville	6.1
23	Philadelphia	5.9
24	Minneapolis	5.3
25	Denver	4.7
26	Tampa	4.4
27	Birmingham	4.1
28	Austin	3.2
29	Richmond	3.2
30	Cleveland	3.0
31	Virginia Beach	2.9
32	Houston	2.8
33	Dallas	2.8
34	San Antonio	2.4
35	Hartford	2.2
36	Pittsburgh	2.1
37	Baltimore	2.0
38	Phoenix	1.8
39	Oklahoma City	1.5
40	Columbus	1.4
41	Detroit	1.3
42	Los Angeles	1.1
43	Cincinnati	1.0
44	San Francisco	0.8
45	Milwaukee	0.7
46	San Diego	0.6
47	New Orleans	0.6
48	San Jose	0.5
49	Sacramento	0.2
50	**Riverside**	**0.2**

Source: National Telecommunications and Information Administration, National Broadband Map

WHERE WE STAND

Economy

Sources and Notes

Broad Measures (Page 73) and Recession and Recovery (Page 74 and 75)

Gross Domestic Product (GDP) is a measure of economic activity that reflects the value of goods and services produced in each region. GDP is presented in current dollars per capita.

Source: Bureau of Economic Analysis; U.S. Census Bureau, 2014 Population Estimates

Change in Gross Domestic Product per Capita, Change in Gross Domestic Product per Capita: Recession, and **Change in Gross Domestic Product per Capita: Recovery** present the inflation-adjusted change in gross domestic product (GDP) per capita using 2009 chained dollars. The recession table presents the change from 2007 to the trough year for GDP in most regions, 2009. The recovery table presents the change from the trough year (2009) to 2013. Regions in New England are defined according to New England City and Town Areas (NECTAs) instead of MSA definitions.

Source: Bureau of Economic Analysis

Change in Employment, Change in Employment: Recession, and **Change in Employment: Recovery** measure the percent change in the number of nonfarm, payroll jobs. The recession table presents the change from 2007 to the trough year for employment in most regions, 2010. The recovery table presents the change from the trough year (2010) to 2014. Regions in New England are defined according to New England City and Town Areas (NECTAs) instead of MSA definitions.

Source: Bureau of Labor Statistics, Current Employment Statistics

Unemployment Rate presents the percentage of the civilian labor force that was unemployed. A person is counted as unemployed if they are jobless, looking for jobs, and available for work. Regions in New England are defined according to New England City and Town Areas (NECTAs) instead of MSA definitions.

Source: Bureau of Labor Statistics, Local Area Unemployment Statistics

Change in Unemployment Rate, Change in Unemployment Rate: Recession, and **Change in Unemployment Rate: Recovery** represent the change in the percent of the labor force that was unemployed. The recession table presents the change from 2007 to the trough year for unemployment in most regions, 2010. The recovery table presents the change from the trough year (2010) to 2014. Regions in New England are defined according to New England City and Town Areas (NECTAs) instead of MSA definitions.

Source: Bureau of Labor Statistics, Local Area Unemployment Statistics

Workforce (Page 77)

Employment-Population Ratio measures the percent of the working age civilian noninstitutionalized population that is employed.

Source: U.S. Census Bureau, 2013 American Community Survey 1-Year Estimates (B18120)

Employment Rate for Adults with Disabilities represents the percent of the working age civilian noninstitutionalized population with a disability that is employed.

Source: U.S. Census Bureau, 2013 American Community Survey 1-Year Estimates (B18120)

Change in College Educated Young Adults measures the percent change in adults aged 25 - 34 years old with a bachelor's degree or higher from the 2005-2009 time period to 2013.

Source: U.S. Census Bureau, 2013 American Community Survey 1-Year (B15001) and 5-Year Estimates (B15001)

Disconnected Youth measures the percent of 16 to 24 year olds who have not attended school in the last three months and have not worked in the last year.

Source: U.S. Census Bureau, 2013 American Community Survey 5-year Estimates, Public Use Microdata Sample

Foreign-Born Workers presents the percent of workers who were not U.S. citizens at birth. Data for Louisville and Birmingham are not available due to low sample size.

Source: U.S. Census Bureau, 2013 American Community Survey 1-Year Estimates (S0501)

Employment by Industry (Page 78 and 79) and Change in Employment by Industry (Page 80 and 81)

Government Employment and **Change in Government Employment** represent civilian employment for all publically-owned establishments at the local, state, and federal level. Regions in New England are defined according to New England City and Town Areas (NECTAs) instead of MSA definitions.

Health Care and Social Assistance Employment and **Change in Health Care and Social Assistance Employment** represent employment within the health care and social assistance sector (NAICS 62). Data are not available for 11 of the peer regions. Regions in New England are defined according to New England City and Town Areas (NECTAs) instead of MSA definitions.

Retail Employment and **Change in Retail Employment** represent employment within the retail trade sector (NAICS 44 and 45). Data are not available for Boston. Regions in New England are defined according to New England City and Town Areas (NECTAs) instead of MSA definitions.

Leisure and Hospitality Employment and **Change in Leisure and Hospitality Employment** represent employment within the arts, entertainment, and recreation sector (NAICS 71) and accommodations and food services sector (NAICS 72). Regions in New England are defined according to New England City and Town Areas (NECTAs) instead of MSA definitions.

Manufacturing Employment and **Change in Manufacturing Employment** represent employment within the manufacturing sector (NAICS 31, 32, and 33). Regions in New England are defined according to New England City and Town Areas (NECTAs) instead of MSA definitions.

Financial Activities Employment and **Change in Financial Activities Employment** represent employment within the finance and insurance sector (NAICS 52) and real estate and rental leasing sector (NAICS 53). Regions in New England are defined according to New England City and Town Areas (NECTAs) instead of MSA definitions.

Source: Bureau of Labor Statistics, Current Employment Statistics

Freight and Exports (Page 83)

Foreign Exports reports the value of merchandise exported from each region to foreign countries. The origin of the export is based on the location of the entity that receives the primary benefit of the transaction, such as the manufacturer, wholesaler, distributor, or order party, and is not necessarily the location of production.

Source: International Trade Administration (downloaded February 18, 2015)

Freight Tonnage and **Freight Value** represent the amount and value of freight imported, exported, or shipped within the region. Data are provided for Freight Analysis Framework (FAF) regions, which were originally defined in 2007 and are composed of state portions of Metropolitan Statistical Areas and Combined Statistical Areas. Data for Providence, Riverside, and San Jose are not available because they are contained within the Combined Statistical Area of other peer regions. The peer region averages are unweighted.

Source: Federal Highway Administration, Freight Analysis Framework (version 3.5, 2012 provisional data)

Truck Congestion Costs reports estimates by the Texas Transportation Institute for geographies that approximate urbanized areas. Costs represent the total annual value of lost time and excess fuel costs for commercial vehicles due to congestion. The peer average is unweighted.

Source: Texas Transportation Institute, 2012 Annual Urban Mobility Report

Innovation (Page 84 and 85)

Patents measures utility patents for inventions that are new and useful divided by the number of wage and salary employees. It does not include design patents, which are issued for the ornamental design of an item, or plant patents, which are issued for invented or discovered plants. About 90 percent of patents issued by the USPTO in recent years have been utility patents.

Source: U.S. Patent and Trademark Office, Patent Technology Monitoring Team, General Patent Statistics Reports, accessed February 2015; Bureau of Economic Analysis

Small Business Firms: MSA boundaries conform to the 2009 delineations issued by the Office of Management and Budget.

Source: U.S. Census, Business Dynamics Statistics

Business Startups represents firms with 1-49 employees that reported positive employment for the first time in 2012. MSA boundaries conform to the 2009 delineations issued by the Office of Management and Budget.

Source: U.S. Census Bureau, Business Dynamics Statistics and 2014 Population Estimates

Venture Capital measures the value of cash-for-equity investments based on a survey of professional venture capital firms, divided by total nonfarm employment.

Source: PricewaterhouseCoopers/ National Venture Capital Association MoneyTree™ Report with data by Thomson Reuters, accessed May 2015; Bureau of Labor Statistics, Current Employment Statistics

STEM Employment: The Brookings Institution identifies STEM jobs based on the level of STEM knowledge they require using data from the Occupational Information Network Data Collection Program. STEM jobs are those that require a high level of knowledge in at least one of the following fields: science (physics, chemistry, and biology), computer and electronics, engineering and technology, or mathematics. Regions in New England are defined according to New England City and Town Areas (NECTAs) instead of MSA definitions. MSA and NECTA boundaries conform to the 2009 delineations issued by the Office of Management and Budget.

Source: Brookings, Metropolitan Policy Program, The Hidden STEM Economy, June 2013

High Speed Internet presents the percent of population living in areas that reportedly have Internet service available at download speeds of at least 1 gigabit per second. National Telecommunications and Information Administration (NTIA) aggregates data collected by a variety of sources. Data reflect service availability as of June 30, 2014. MSA boundaries conform to the 2009 delineations issued by the Office of Management and Budget.

Source: National Telecommunications and Information Administration, National Broadband Map

Rank Order: For consistency, the peer regions are presented from highest to lowest numeric value in all WWS tables. The ordering of the data is not meant to suggest any positive or negative judgment associated with a given measure.

In the WWS tables most data are rounded to the tenths place value (one digit after the decimal point) for presentation purposes. When possible the rank of the regions is based on the unrounded value (to the hundredth, thousandth, or more place value). In some instances there appears to be a tie between regions according to the value in the table, but the rank of the regions is based on the unrounded value. When peer regions have the same value according to the source data they are assigned the same rank.