



# Regional Data Snapshot

*Industry Cluster Analysis*  
*SET Session 1*

**Ozark Foothills, Missouri**

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# 01 overview

Ozark Foothills, Missouri

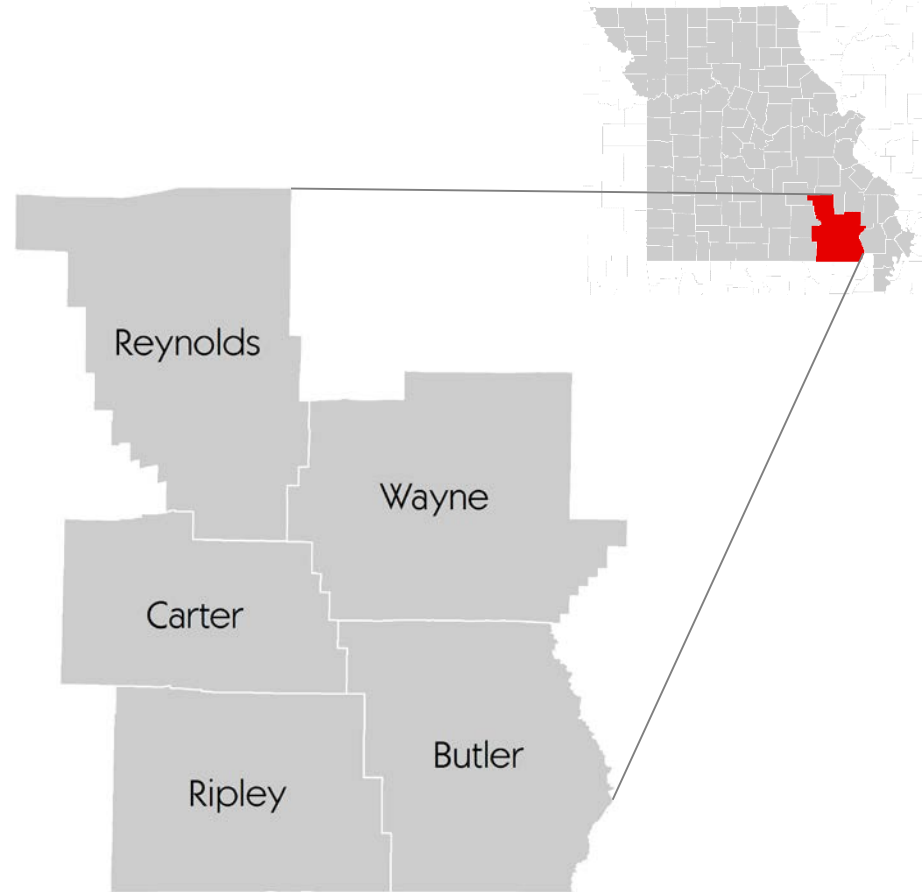
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## Overview

# Ozark Foothills Region, MO

The Ozark Foothills Region is comprised of 5 Missouri counties. State Highway 60 connects the region to I-55 in the East.

- Butler
- Carter
- Reynolds
- Ripley
- Wayne



# 02 industry and occupation

**Establishments**

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**Employment by industry**

## Industry and occupation

# Components of changes in Jobs

### Changes in Jobs (2009-2015)

Gained by	New Startups	14,552
	Spinoffs	2,991
	Expansion	4,385
	In-migration	235
Lost by	Closings	12,509
	Contractions	9,323
	Out-migration	311
	<b>Net change</b>	<b>20</b>

An establishment is a physical business location.

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



### Definition of Company Stages

<b>0</b>	Self-employed	<b>1</b>	2-9 employees
<b>2</b>	10-99 employees	<b>3</b>	100-499 employees
<b>4</b>	500+ employees		

## Industry and occupation

# Establishments

### Number of Establishments by Company Stages

Stage	2009		2015	
	Establishments	Proportion	Establishments	Proportion
Stage 0	740	20%	593	15%
Stage 1	2,358	62%	2,582	67%
Stage 2	643	17%	635	16%
Stage 3	37	1%	36	1%
Stage 4	5	0.1%	5	0.1%
<b>Total</b>	<b>3,783</b>	<b>100%</b>	<b>3,851</b>	<b>100%</b>

### Questions:

- What stage businesses have shaped the region's economic growth in the last 6 years?
- Which ones are growing or declining the most?
- Which stage of establishments are likely to shape the region's future economic growth?

## Industry and occupation

# Establishments

### Number of Jobs by Company Stages

Year	2009	2015	% Change
Stage 0	740	615	-17%
Stage 1	8,722	9,957	14%
Stage 2	16,968	16,075	-5%
Stage 3	5,689	5,477	-4%
Stage 4	3,935	3,950	0.4%
<b>Total</b>	<b>36,054</b>	<b>36,074</b>	<b>0%</b>

### Sales (\$Billion, 2015) by Company Stages

Year	2009	2015	% Change
Stage 0	0.16	0.8	409%
Stage 1	1.94	2.4	25%
Stage 2	2.94	2.7	-9%
Stage 3	0.89	1.4	56%
Stage 4	0.62	0.9	51.4%
<b>Total</b>	<b>6.54</b>	<b>8.21</b>	<b>26%</b>

## Questions

What establishments are the most numerous based on company stages?

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

What company stage employs the largest number of people?

What stage captures the most sales?

Which ones have experienced the greatest percentage loss over the 2009-2015 period?



## Industry and occupation

# Top ten industry sector employment growth

NAICS	Description	2009 Jobs	2014 Jobs	Change	Change (%)	State Change (%)
21	Mining, Quarrying, and Oil and Gas Extraction	40	76	36	90%	26%
55	Management of Companies and Enterprises	39	56	17	44%	11%
62	Health Care and Social Assistance	4,951	6,511	1,560	32%	14%
56	Administrative and Support and Waste Management and Remediation Services	1,678	2,053	375	22%	11%
72	Accommodation and Food Services	2,306	2,541	235	10%	6%
44	Retail Trade	4,562	4,809	247	5%	1%
54	Professional, Scientific, and Technical Services	909	953	44	5%	7%
48	Transportation and Warehousing	1,224	1,282	58	5%	4%
52	Finance and Insurance	1,382	1,414	32	2%	4%
42	Wholesale Trade	839	844	5	1%	3%

### Questions:

- What regional industry sectors have seen the greatest growth?
- Did they grow at the same rate as the state?
- What factors are causing the growth?

## Industry and occupation

# Top ten industry sector employment decline

NAICS	Description	2009 Jobs	2014 Jobs	Change	Change (%)	State Change (%)
81	Other Services (except Public Administration)	3,601	2,291	-1,310	-36%	-2%
61	Educational Services	90	79	-11	-12%	9%
22	Utilities	190	167	-23	-12%	-6%
23	Construction	2,148	1,957	-191	-9%	-6%
31	Manufacturing	4,506	4,250	-256	-6%	1%
51	Information	403	389	-14	-3%	-14%
71	Arts, Entertainment, and Recreation	319	308	-11	-3%	5%
90	Government	6,202	5,992	-210	-3%	-5%
11	Crop and Animal Production	2,397	2,326	-71	-3%	-1%
53	Real Estate and Rental and Leasing	984	955	-29	-3%	2%

### Questions:

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

# 03 Industry cluster analysis

Ozark Foothills, MO

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## Industry cluster analysis

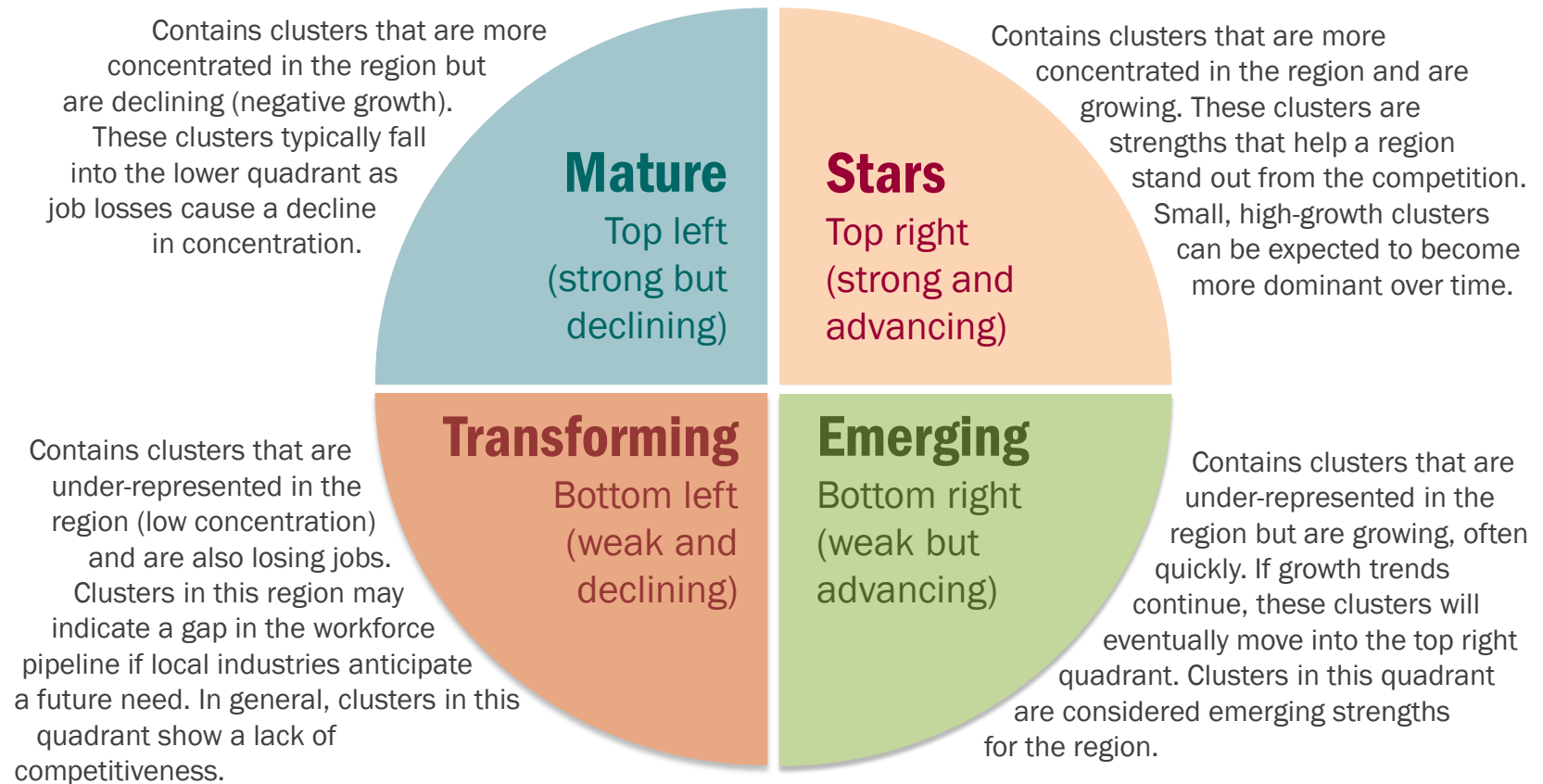
# List of Clusters

- Advanced Materials
- Agribusiness, Food Processing & Technology
- Apparel & Textiles
- Arts, Entertainment, Recreation & Visitor Industries
- Biomedical/Biotechnical (Life Sciences)
- Business & Financial Services
- Chemicals
- Computer & Electronic Product Manufacturing
- Defense & Security
- Education & Knowledge Creation
- Electrical Equip, Appliance & Component Manufacturing
- Fabricated Metal Product Manufacturing
- Energy (Fossil & Renewable)
- Forest & Wood Products
- Glass & Ceramics
- Information Technology & Telecommunications
- Machinery Manufacturing
- Manufacturing Super-cluster
- Mining
- Primary Metal Manufacturing
- Printing & Publishing
- Transportation & Logistics
- Transportation Equipment Manufacturing

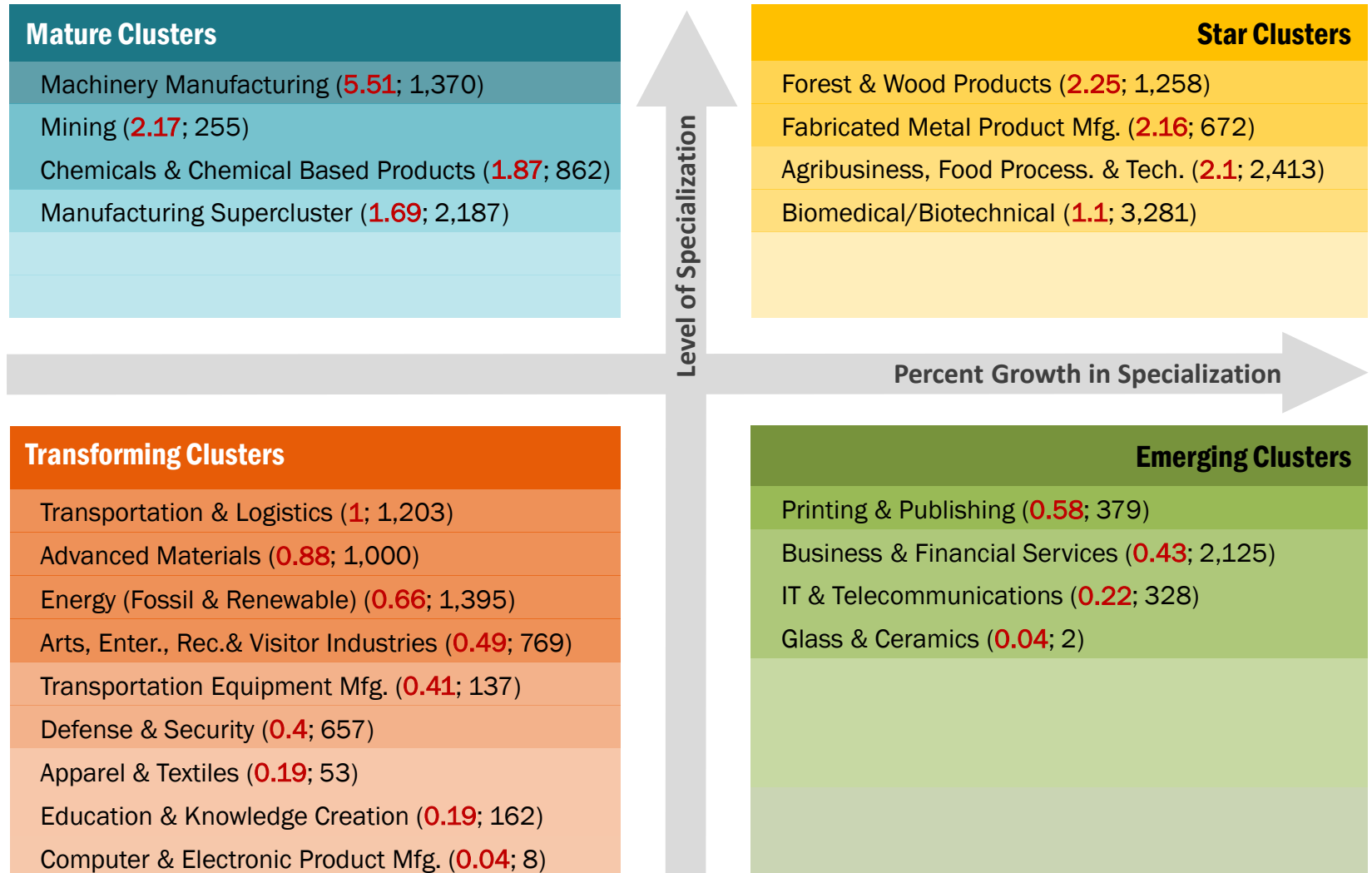
## Industry cluster analysis

# How to interpret cluster data results

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



## Industry cluster analysis

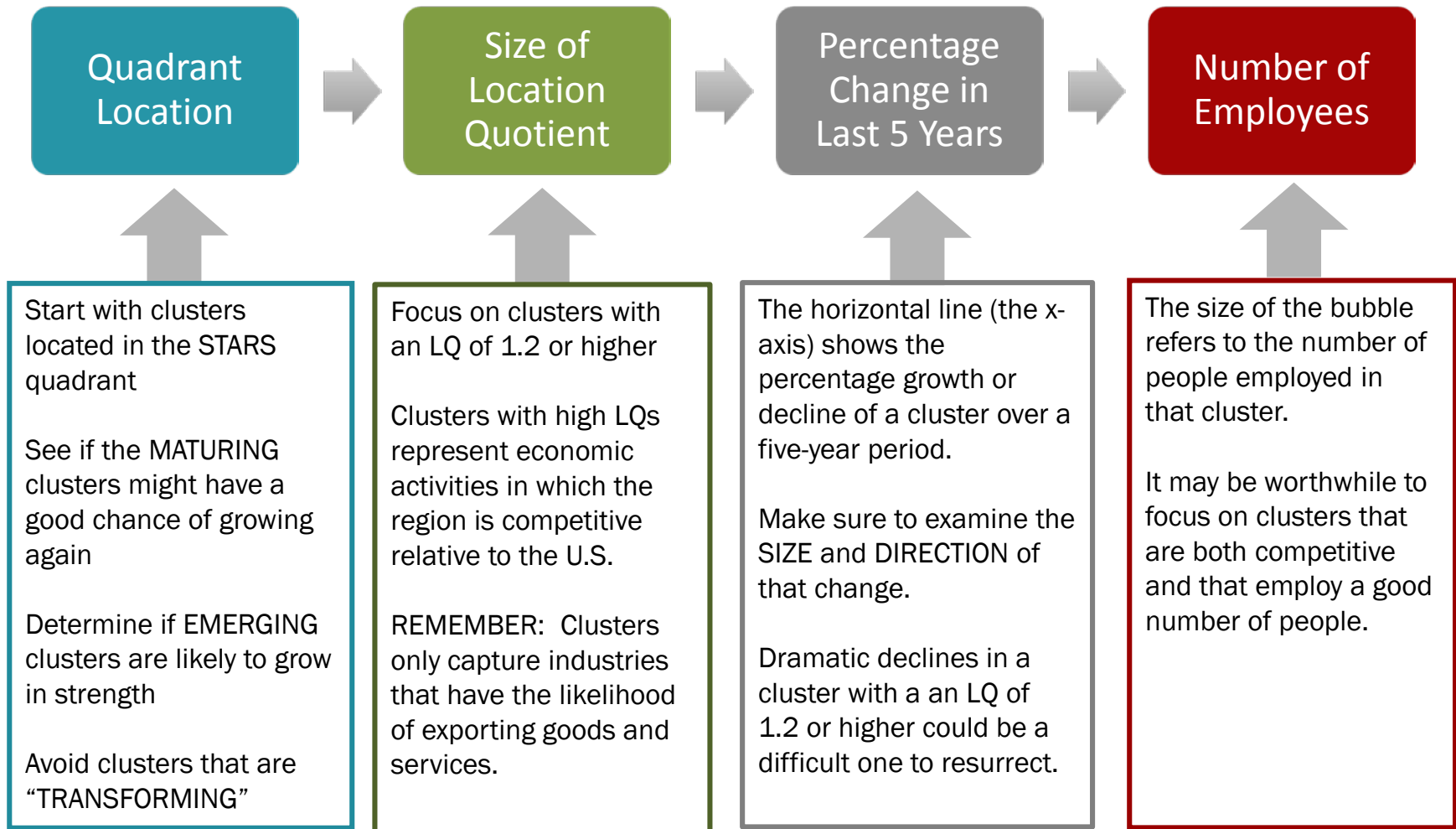


Note: There is no 2014 regional jobs in Primary Metal Mfg.; and Electrical Equipment, Appliance & Component Mfg.

### section 03

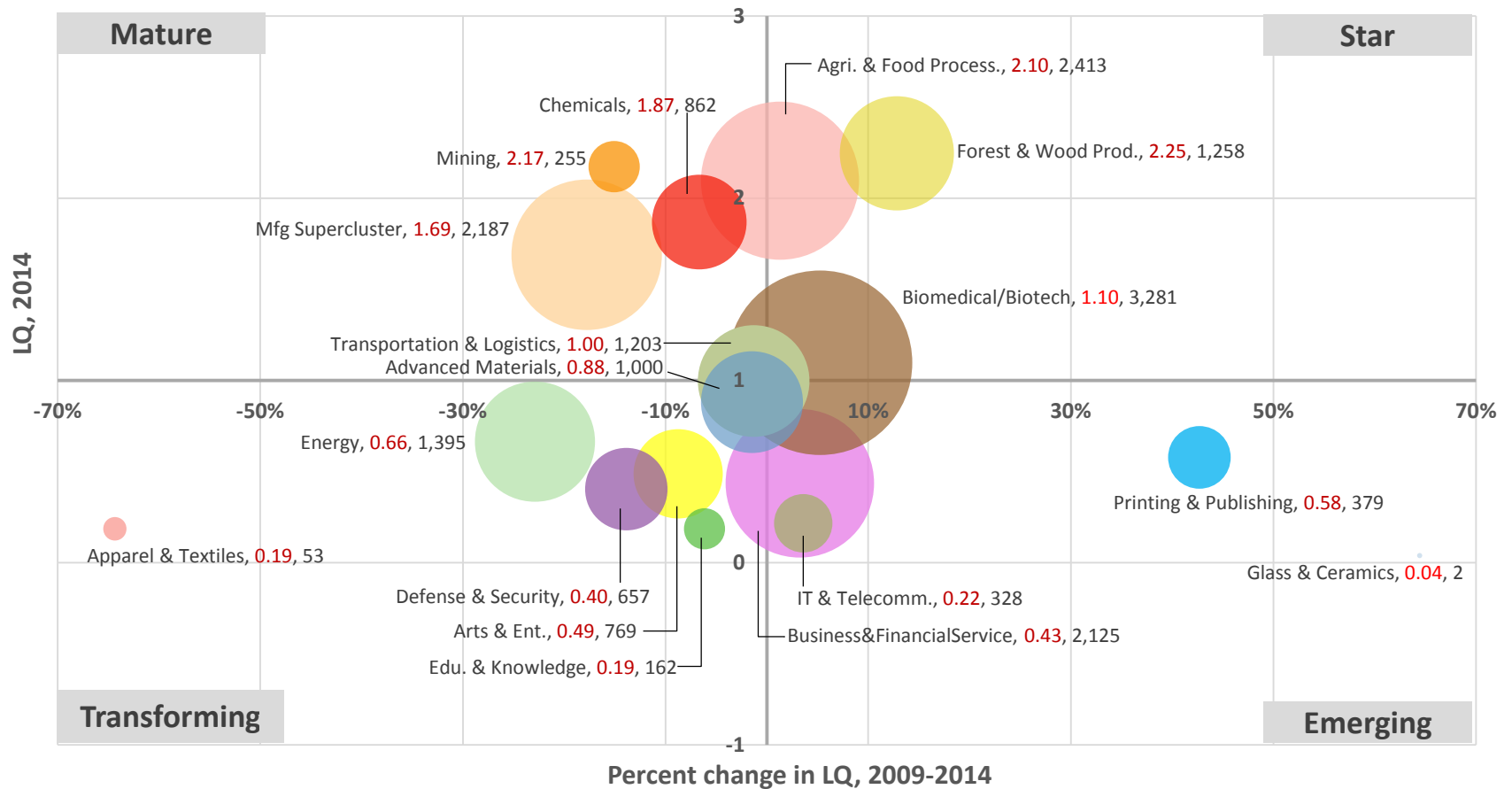
NOTE: The first number after each cluster represents the number of total jobs (full and part time jobs by place of work) in that cluster in the region in 2014. The clusters are sorted in decreasing order by location quotient as shown in the bubble chart.

# Bubble Chart: What to Look at First



## Industry and occupation

# Industry cluster bubble chart

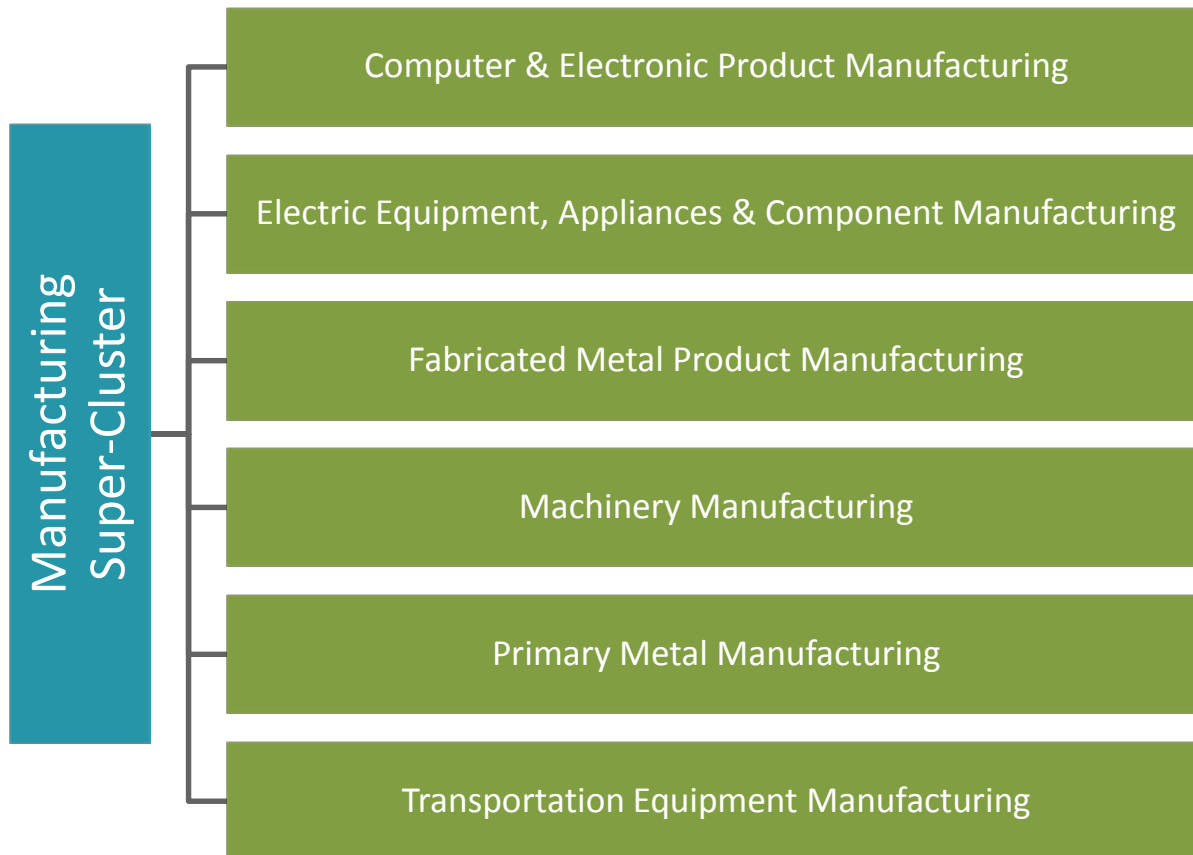


Note: Label includes cluster name, LQ in 2014, and Employment in 2014



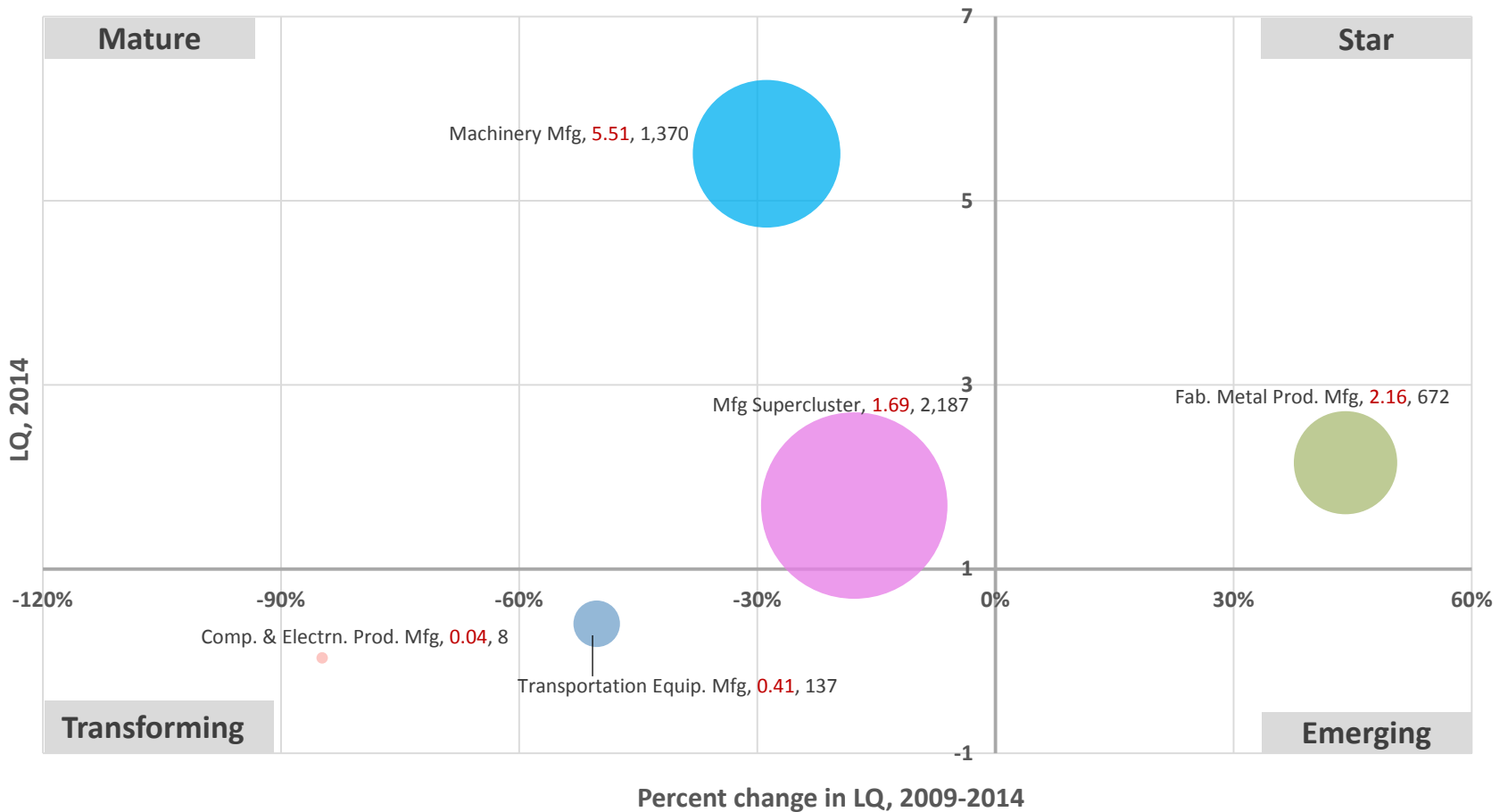
# The Manufacturing Super-Cluster

Please note that this is not a cluster that a SET region should select. Rather, focus on the manufacturing sub-clusters that are important to that super-cluster.



## Industry and occupation

# Manufacturing sub-cluster bubble chart



Note: Label includes cluster name, LQ in 2014, and Employment in 2014.

Note: There is no 2014 regional jobs in Primary Metal Mfg.; and Electrical Equipment, Appliance & Component Mfg.

## Industry and occupation

# For your region

### Mature Industries

Three industry clusters in the Ozark Foothills Region are in the Matured stage: Machinery Mfg.; Mining; and Chemicals. These industries are relatively concentrated, but its growth is trending downward. It is worth noting, however, that the Ozark Foothills Region may find it worthwhile to invest in efforts to shore up the concentration of these industries.

### Transforming Industries

Transforming clusters capture the mix of industries that are experiencing relative decline and limited export capability. In the Region, Transportation & Logistics; Advanced Materials; Energy; Arts, Ent., Rec. & Visitor Industries; Transportation Equip. Mfg.; Defense & Security; Apparel & Textiles; Education & Knowledge Creation; and Computer & Electronic Prod. Mfg., nine industry clusters are all Transforming clusters. Any amount of growth in these industries would require relatively large investments.

### Star Industries

Star industry clusters are highly concentrated, exporting and still experiencing growth in the region. Four Star industry clusters in the Ozark Foothills Region are Forest & Wood Products; Fabricated Metal Product Mfg.; Agribusiness, Food Processing & Tech.; and Biomedical/Biotechnical (Life Sciences). These clusters indicate that they have a little more jobs concentration in the region compared to the U.S.

### Emerging Industries

Industry clusters that may be poised for future growth are classified as “Emerging.” There are four Emerging clusters in total in the Ozark Foothills Region: Printing & Publishing; Business & Financial Services; IT & Telecom.; and Glass & Ceramics.

# 04 occupations

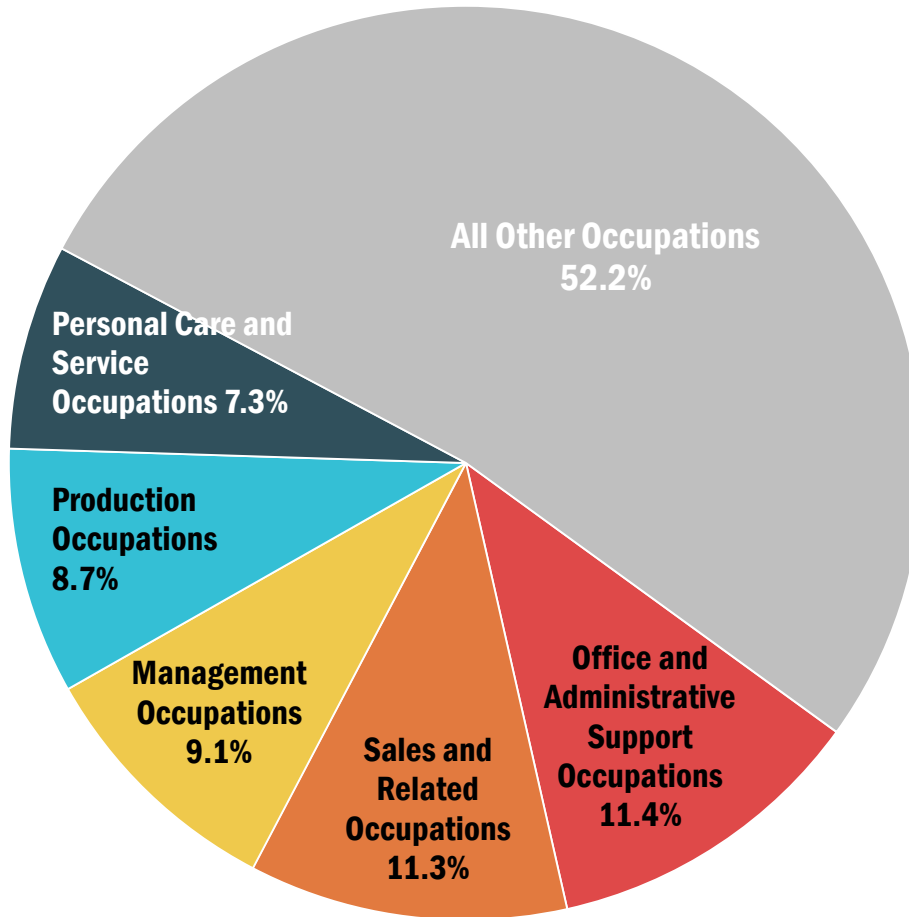
**Top occupations**

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**STEM occupations**

## Industry and occupation

# Top five occupations in 2014

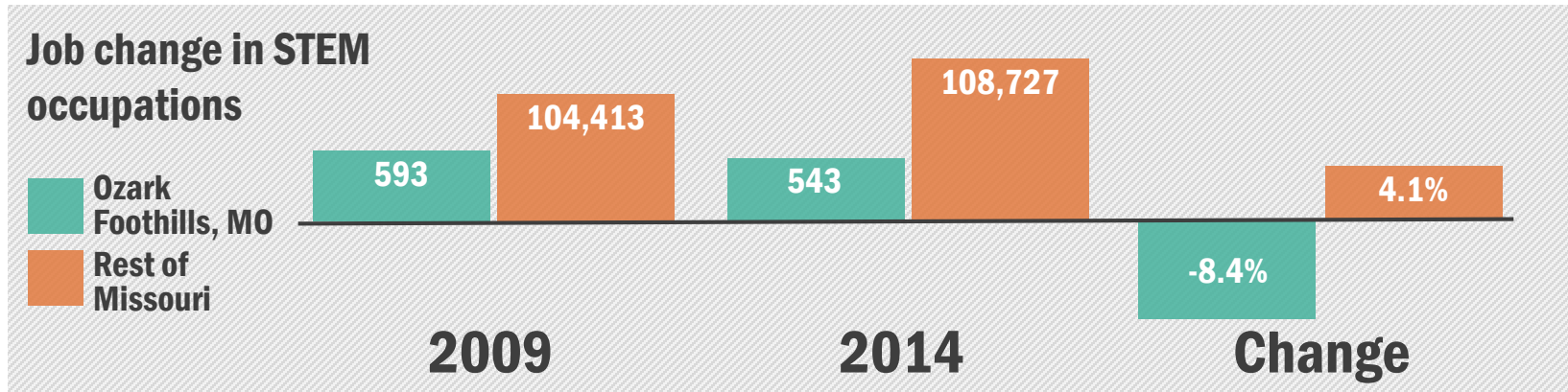


### Questions:

- What are the education and skill requirements for these occupations?
- Do the emerging and star clusters align with the top occupations?
- What type salaries do these occupations typically provide?

## Industry and occupation

# Science, Technology, Engineering & Math



## Questions:

- How do STEM jobs compare to the state?
- What has been the trend of STEM jobs over time?
- How important are STEM jobs to the region's Star and Emerging clusters?

# Report Contributors

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