

## Section 1. Growth

The Where We Stand (WWS) series produced by East-West Gateway (EWG) has compared the St. Louis region to other large metropolitan areas since 1992. WWS ranks St. Louis among the 50 most populous Metropolitan Statistical Areas (MSA) in the United States (the peer regions) on a broad range of topics important to the region.



In November 2024, EWG published the ninth edition of WWS, with an accompanying suite of additional resources. This edition of WWS took a different approach than was used for past editions. The central motivation for changing the WWS formula was to contribute more directly to efforts to make St. Louis a *successful* region. WWS 9 is intended as an introduction to a larger conversation about where we as a region stand, where we are going, and how we plan to get there together.

WWS9 digs into 12 key topic areas grouped into three broad categories. The first group, Growth Metrics, includes population change, employment change, and unemployment. The second group, Livability Metrics, comprises racial disparity, homeownership, housing affordability, vacancy rates, crime, and infant mortality. The third group, Opportunity Metrics, consists of income and income inequality, education, poverty, and well-being.

This document is a portion of the full document. Access the additional chapters, entire eighth edition, additional data, updates, white papers, and past editions at [www.ewgateway.org/wws](http://www.ewgateway.org/wws).

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# GROWTH

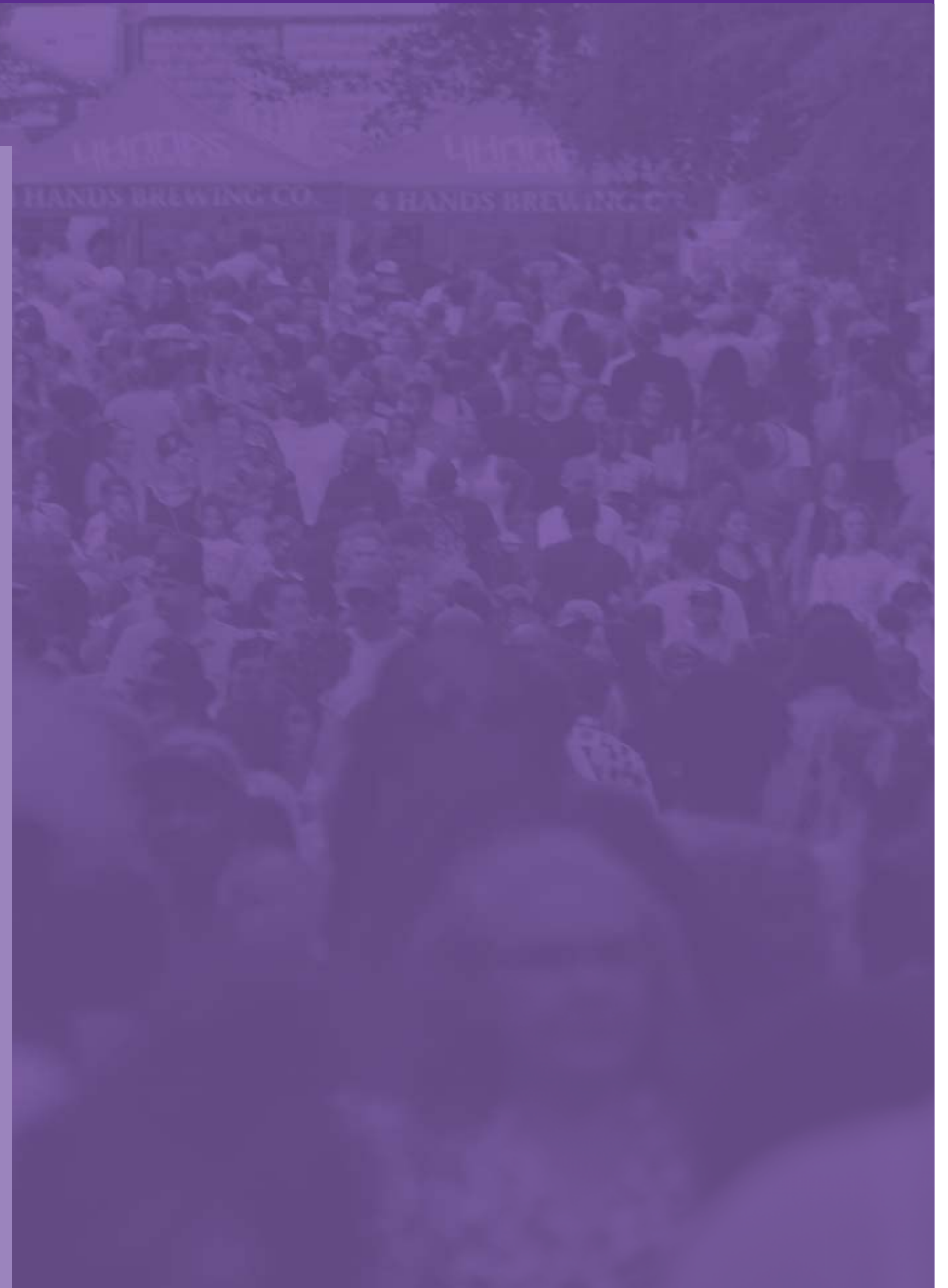
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POPULATION  
EMPLOYMENT



# Population

**In recent decades, the St. Louis MSA has had a stable population.** It stood as the 23rd most populous U.S. region in 2023 with slow growth from 1980 to 2020 and a small decline since 2020. While population growth can be an indicator of regional health, other factors are important to consider in assessing the vitality of a region. There are mixed results across the other vitality metrics among the peer regions with large increases in population. While St. Louis has not had population growth, its per capita income remains higher than six of the fastest growing peer regions, and the region has less out-migration than most of the peer regions.





# Measuring Success: Population

**What is being measured?** This vitality metric measures the increase or decrease in the number of residents in a community over a specified period of time. There are several challenges with comparable data for this metric as well as a broad challenge of a limited view that often portrays population change only as a result of people's choice to move.

Quantitative challenges include geography revisions, non-comparable data over time, and selection of time period. The Census regularly revises MSA boundaries. EWG and others adapt to this by aggregating county data to the MSA level, but not everyone is aware of when this adaptation is necessary. Further, the Census advises to not compare population estimates that are based on different decennial censuses. After each decennial census the Census Bureau revises annual population estimates for the previous decade; as of this writing, however, these intercensal estimates are not available for 2010 to 2019.<sup>1-01</sup> Lastly, the selection of the time period for analysis may affect results. A 1-year analysis may show the latest trends but may also turn out to be a statistical fluke. A 10- or 15-year trend may be more stable but lack timeliness.

Most discussions of population change focus on migration. However, births and deaths also play a large role in population change. The Centers for Disease Control and Prevention (CDC) estimate that 30 to 60% of

several leading causes of death are preventable among people under age 80.<sup>1-02</sup> Addressing societal challenges, such as reducing homicides and racial disparities, could reduce the death rate and be a regional growth strategy.

## **What makes this a good measure of success?**

In-migration indicates that a region's attributes lead people to move there, and out-migration indicates there may be aspects of a community that make it a less desirable location to live.

Population growth can stimulate economic activity as well as provide funds for public services.

Increased population, particularly increased density of population, can create economies of scale that make funding public services more efficient.

An increase in the largest city population is often thought of as an indicator of a healthy region. The central parts of metropolitan regions are generally the oldest parts of a region, and tend to be hubs of activity, due to convention centers, sporting facilities, cultural and arts institutions, and tourist destinations.

Both East-West Gateway's Long Range Transportation Plan and Greater St. Louis Inc. identify support for the central core as a goal for the region.

## **What is problematic about this measure?**

Population growth can negatively affect quality of life through increased housing costs, traffic congestion, pollution, stressed infrastructure, greater demand for human services, and decreasing space for parks, trails, and other outdoor amenities.

Population growth does not always lead to prosperity: Some Sunbelt regions have fast-growing populations, but consistently lag in income levels. While a population decrease is usually perceived as a negative, a decrease can occur for neutral or even positive reasons. The population of the United States is aging, and the birth rate is declining for a variety of reasons. This circumstance is not necessarily negative, but does require adaptation.

Regions that have large net in-migration also tend to have a substantial number of people leaving the region,

indicating that the population is in flux. There is also value in having a stable population with deep roots in a community. High growth regions, including **Orlando, Austin, Raleigh, and Jacksonville**, tend to have larger percentages of people moving out of the MSA while older and larger regions, mostly in the Northeast and Midwest have smaller proportions.<sup>1-03</sup> See Box 1-01 on page 6 for more.

1-01 The Census Bureau releases intercensal estimates that are based on both the 2010 and 2020 decennial census counts. These intercensal estimates are likely to differ from currently available population estimates. The Bureau of Economic Analysis (BEA) generated its own such estimates while waiting for the Census Bureau. Based on preliminary estimates from BEA, it is anticipated that there will be significant revisions for a few of the peer regions.

1-02 Spencer, M. R., et al. (2024). Surveillance for violent deaths — National violent death reporting system, 48 states, the District of Columbia, and Puerto Rico, 2021. *MMWR Surveillance Summaries*, 73(2), 1–37. <https://doi.org/10.15585/mmwr.ss7302a1>

1-03 U.S. Census Bureau, American Community Survey 5-Year Estimates, 2015-2019, Metro-to-Metro Area Migration Flows

## **What Makes a Region Successful?**

Thoughts from a survey of St. Louis region residents

***A successful region should be growing in population and have a positive national reputation”***

*—City of St. Louis Resident*

***“Austin, Nashville, and Louisville...were smaller in population and size, but they found a way to attract businesses and population while St. Louis has declined.”***

*—Monroe County Resident*

# Peer Region Analysis: Population

The peer region comparisons on population change for the two time periods indicate that while population change can be an indication of success, population growth does not necessarily result in positive outcomes on other metrics. Conversely, some regions are strong without population growth.

The nine fastest-growing regions in both periods were all in the Sunbelt. These regions also tend to have had the largest increases in employment, net migration, and population of their largest city.

**Orlando, Nashville, Jacksonville, and Dallas** are among the largest population gainers but are only in the middle of the pack on median household income and educational attainment and rank lower than the United States on housing affordability and health insurance coverage.

**Houston, Tampa, San Antonio, and Las Vegas** are among the largest population gainers but are also among the most challenged regions on many of the vitality metrics, including poverty, health insurance, well-being, and educational attainment.

**San Jose** and **Boston** rank among the most favorable regions on many vitality metrics, including the well-being score and other metrics that are important to quality of life, such

as health care coverage, income metrics, and infant mortality rate. However, these regions have been about average in population change with **San Jose** experiencing a population decrease from 2019 to 2023.

There is not a strong association between population growth and income. Of the 10 fastest-growing regions from 2019 to 2023, only four had per capita income levels that were higher than that of **St. Louis** and four were in the bottom half of the peer regions on this income variable. Further, the two regions with the highest per capita incomes experienced population decline from 2019 to 2023 and were below the U.S. average for change from 2010 to 2023.

The slowest growing regions tend to have high levels of segregation and concentrated poverty. These fall into two groups: low-income southern regions, including **Birmingham, Memphis, and New Orleans**, and traditionally industrial regions in the north, including **Detroit, Cleveland, and Buffalo**.

## Population Change

Percent change, 2019-2023

1	<b>Austin</b>	<b>11.0</b>
2	Jacksonville	9.7
3	Nashville	8.7
4	Raleigh	8.4
5	Orlando	8.0
6	Dallas	6.9
7	Houston	6.3
8	Charlotte	6.2
9	San Antonio	6.0
10	Indianapolis	5.0
11	Atlanta	5.0
12	Oklahoma City	4.8
13	Tampa	4.5
14	Richmond	4.3
15	Providence	3.4
16	Salt Lake City	3.0
17	Kansas City	2.8
18	Las Vegas	2.7
19	Columbus	2.6
20	Birmingham	2.6
21	Buffalo	2.4
22	Sacramento	2.4
23	Cincinnati	2.4
24	Phoenix	2.3
25	Philadelphia	2.3
26	Virginia Beach	2.2
<b>United States</b>		<b>2.0</b>
27	Minneapolis	2.0
28	Washington, D.C.	1.8
29	Louisville	1.8
30	Seattle	1.7
31	New York	1.7
32	Denver	1.4
33	Baltimore	1.1
34	Riverside	1.0
35	Boston	0.9
36	Pittsburgh	0.8
37	Portland	0.6
38	Cleveland	0.6
39	Detroit	0.5
40	Miami	0.3
41	Chicago	-0.2
42	<b>St. Louis</b>	<b>-0.3</b>
43	Memphis	-0.8
44	Milwaukee	-1.1
45	San Diego	-1.8
46	San Jose	-2.0
47	Los Angeles	-2.9
48	San Francisco	-3.3
49	<b>New Orleans</b>	<b>-5.0</b>

Source: U.S. Census Bureau, Population Estimates

## Population Change

Percent change, 5414-5453

1	<b>Austin</b>	<b>43.2</b>
5	Raleigh	35.6
3	Yrlando	31.6
8	Nashville	56.8
0	Jacksonville	56.4
7	Dallas	57.6
6	Houston	57.3
2	San Antonio	50.7
9	Charlotte	58.6
14	Phoenix	54.7
11	Tampa	19.9
15	Las Vegas	19.6
13	Atlanta	19.8
18	Denver	16.7
10	Yklahoma City	16.0
17	Seattle	16.3
16	Salt Lake City	17.5
12	Indianapolis	10.3
19	Columbus	18.8
54	Richmond	13.7
51	Washington, D.C.	13.1
55	Sacramento	15.8
53	Portland	15.8
58	Minneapolis	11.1
50	Miami	14.6
57	Riverside	14.0
56	Kansas City	14.3
<b>United States</b>		<b>8.3</b>
52	Boston	6.6
59	Louisville	7.9
34	Cincinnati	7.0
31	Virginia Beach	0.2
35	San Jose	0.6
33	San Diego	0.8
38	San Francisco	0.1
30	Birmingham	8.9
37	Providence	8.6
36	Philadelphia	8.7
32	Baltimore	8.8
39	New Oork	3.8
84	Buffalo	1.2
81	Memphis	1.8
85	Detroit	1.5
43	<b>St. Louis</b>	<b>0.2</b>
88	Milwaukee	4.5
80	New Yrleans	4.1
87	Los Angeles	-4.3
86	Chicago	-4.8
82	Cleveland	-4.2
49	<b>Pittsburgh</b>	<b>-1.0</b>

Source: U.S. Census Bureau, Population Estimates

Regions that experience large net migration often see high levels of both in-migration and out-migration. **St. Louis** is 43rd with one of the lowest rates of in-migration (2.9%), but the region has the 14th lowest rate of out-migration (3.1%). **Orlando, Austin, and Raleigh** have the three largest in-migration and net migration rates but had some of the highest rates of out-migration, ranking 10th, 12th, and 8th, respectively.

Over the last decade, some of the peer regions have experienced substantial growth in population of their largest cities while others have seen decreases. Regions with growing central cities, such as **Orlando, Charlotte, Austin, and Raleigh,**

also experienced some of the largest growth in employment and regional population and had relatively high rates of net migration. Regions with central city population decreases also experienced relatively large decreases in regional employment and population and high regional homicide rates.

Like other regions in the Midwest and South, the central city in the **St. Louis** MSA has experienced population decline. Among the peer regions, only **Detroit** had a larger decrease than the city of **St. Louis**.



### Net Migration

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1	Jacksonville	5.9
2	ABi tm	4.5
0	Tar pa	4.8
8	x alhrsau	4.7
3	Ygande	4.3
5	RanAntenra	4.2
9	Cuageth	4.2
6	Dallai	4.7
4	QuehnrR	4.8
17	wai uvrith	4.2
11	HeBi ten	4.1
12	YMauer alCrk	4.9
10	x rour end	4.0
18	ai ky hsai	4.2
13	Atlanta	4.7
15	Hagfegd	4.3
19	Indranapelin	4.8
16	CelBr bBi	4.7
14	x nhg rdh	4.4
<b>United States</b>		<b>0.8</b>
27	L rar m	4.5
21	Jani ai kCrk	4.5
22	Cmcmnatm	4.5
20	Ogevrhnhc	4.3
28	org msuar	4.3
23	eBivvrith	4.0
25	Raccar hnte	4.0
29	Dhnhvg	4.1
26	Orti bBgsu	-7.1
24	Ortadhlpura	-7.2
07	y rsmrao hacu	-7.2
01	oBfale	-7.0
02	Cilvhland	-7.3
33	<b>St. Louis</b>	<b>-0.5</b>
08	Rhattlh	-7.5
03	L mnhapelin	-7.5
05	oaltrn egh	-7.9
09	Oegland	-7.6
06	Wai umsten, D.C.	-7.6
04	oei ten	-7.6
87	Dhtgerh	-7.4
81	L hr purm	-1.1
82	L rlv aBmhh	-1.1
80	Raltk alMkCrk	-1.2
88	RanDrtse	-1.6
83	Curbase	-2.0
85	ei kAnshlhi	-0.0
89	whV kNegM	-0.0
86	RanlFei h	-0.5
84	RanlSgancnce	-8.0
50	<b>New Orleans</b>	<b>-4.7</b>

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### Change in Largest City Population

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1	<b>Orlando</b>	<b>32.40</b>
4	Shattlh	48.13
8	Cuageth	44.32
2	ABi tm	41.64
6	Yklauer a City	17.57
5	Dhnhvg	19.79
0	Tar pa	19.24
9	Jacki envrith	19.43
7	Ralhrsau	10.78
13	Atlanta	15.99
11	CelBr bBi	16.39
14	Puehnr	18.50
18	Nai uvrith	18.49
12	Saccar hnte	18.44
16	Mrar m	14.64
15	Lai Vhsai	14.49
10	Rour end	14.41
19	Wai umsten, D.C.	11.52
17	Mmnhapelin	11.11
43	San Antenra	11.31
41	Kani ai City	13.02
44	HeBi ten	13.38
48	Salt Lakh City	7.09
42	Pegland	9.09
46	Dallai	9.61
45	Nhw Y ghani	0.62
40	Indranapelin	0.88
49	Pgevrhnhc	5.55
47	San Drtse	5.37
<b>Peer Average</b>		<b>6.05</b>
83	oBfale	6.07
81	Rnhg rdh	6.66
84	oei ten	6.88
88	LeBivvrith	2.94
82	Cmcmnatm	2.19
86	V rsmrao hacu	2.36
85	Purtadhlpura	4.03
80	San Jei h	1.79
89	Nhw Oeg	1.70
87	Lei Anshlhi	3.00
23	San Fgancnce	3.23
21	Prti bBgsu	-3.07
24	Curbase	-1.12
28	Hagfegd	-8.45
22	Mhr purm	-2.08
26	MrtwaBkhh	-6.46
25	org msuar	-0.14
20	oaltrn egh	-9.17
29	Cilvhland	-9.99
49	<b>St. Louis</b>	<b>-10.25</b>
50	<b>Detroit</b>	<b>-13.11</b>

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# EWG Region Analysis: Population

Population in the EWG region has had modest growth over the past few decades but recently experienced a small decrease in population. The central part of the region has experienced decreases in population while there has been an increase in the outer portions. Table 1-01 provides the population by county for 2010, 2019, and 2023. Map 1-01 provides the change in population across the region from 2010 to 2020.

Table 1-01. Population					
East-West Gateway region by county, 2010, 2019, and 2023					
	2010	2019	2023	Percent Change	
				2010-2023	2019-2023
Madison	269,282	263,609	262,752	-2.4	-0.3
Monroe	32,957	34,738	34,957	6.1	0.6
St. Clair	270,056	259,889	251,018	-7.0	-3.4
Franklin	101,492	103,860	106,404	4.8	2.4
Jefferson	218,733	225,402	231,230	5.7	2.6
St. Charles	360,485	401,625	416,659	15.6	3.7
St. Louis	998,954	995,467	987,059	-1.2	-0.8
City of St. Louis	319,294	300,887	281,754	-11.8	-6.4
<b>EWG Region</b>	<b>2,571,253</b>	<b>2,585,477</b>	<b>2,571,833</b>	<b>0.0</b>	<b>-0.5</b>

Source: U.S. Census Bureau, Decennial Census, Population estimates vintages 2020 and 2023

## Box 1-01. Where do people move and why?

Most people in the United States do not move in any given year, and the share who do has declined over the long term. Further, most people who move do not move far.

The percentage of U.S. residents that moved in a given year decreased from 20.2% in 1948 to 17% in the 1990s, 8.9% in 2019, and 8.4% in 2021.<sup>1-04,1-05,1-06</sup> Research suggests that this is in part due to labor markets among regions becoming more similar.<sup>1-07</sup> A recent study found that less than 2% of job seekers moved for a job in the first quarter of 2023, compared to about 8% in 2018 and about one-third in the 1980s and 1990s.<sup>1-08</sup>

U.S. region inter-regional migrants constituted a small share of movers, about 10.7% of movers, or 1.3% of the U.S. population, in 2022. The Northeast had the highest percentage of non-movers, and the South had the lowest percentage.<sup>1-09</sup> The share of non-movers among the peer regions ranged from 81.7% in Austin to 90.6% in New York. The percentage in St. Louis (86.4) was close to the peer region average (85.3%).

**Why People Move.** People decide where to live for a variety of reasons. Reasons for moving can be complex and can change throughout a lifetime. Broadly, there are three categories of why people live where they do—employment, social ties (family/friends), and quality of life factors.

Census data indicates that the most common reasons for moving are house-related followed by family-related. These two categories likely each have elements that relate to quality of life and social ties. According to the data, employment is the reason for a move for a smaller share of people. The Census does not have a category for quality-of-life factors, but other survey research indicates that one-third of movers and one-third of natives chose their place of residence due to these over employment or family reasons.<sup>1-10</sup> For more details on this topic, see [ewgateway.org/wws](http://ewgateway.org/wws) for a working paper on population change.

1-04 Current Population Survey Annual Social and Economic Supplement (CPS ASEC).

1-05 U.S. Census Bureau. (2022). United States migration continued to decline from 2020 to 2021. <https://www.census.gov/library/stories/2022/03/united-states-migration-continued-decline-from-2020-to-2021.html>

1-06 Frey, W. H. (2021). U.S. population growth hits 80-year low, capping off a year of demographic stagnation. Brookings. <https://www.brookings.edu/articles/us-population-growth-hits-80-year-low-capping-off-a-year-of-demographic-stagnation/>

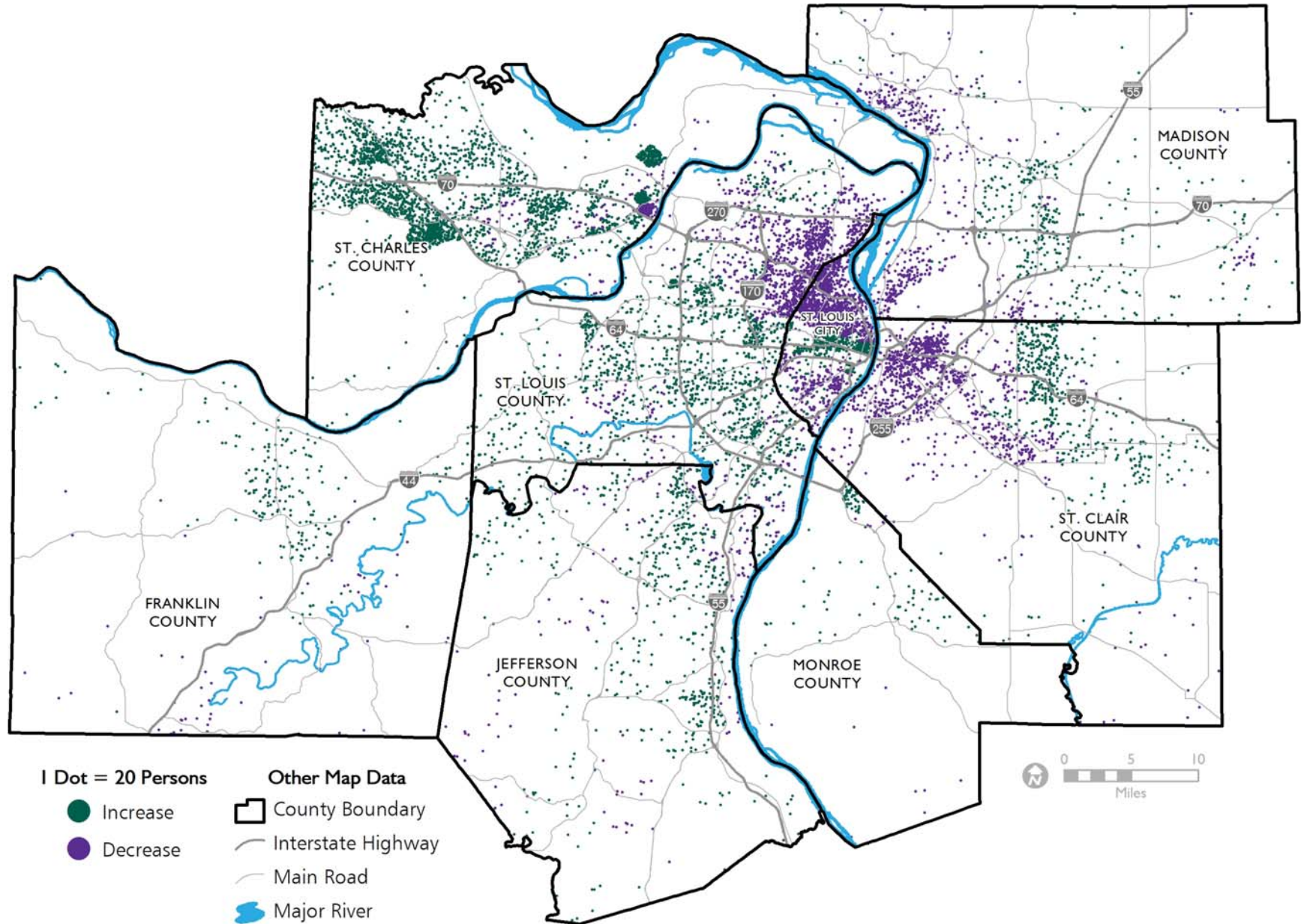
1-07 Hellerstein, J. K. (2013). Why are Americans moving less? Federal Reserve Bank of Minneapolis. <https://www.minneapolisfed.org/article/2013/why-are-americans-moving-less>

1-08 Chasnoff, M. (2023, May 30). Workers aren't relocating for new jobs anymore – and not just because of remote work. St. Louis Business Journal. [https://www.bizjournals.com/stlouis/news/2023/05/30/remote-work-hybrid-housing-costs-mortgage-move.html?utm\\_source=st&utm\\_medium=en&utm\\_campaign=me&utm\\_content=SL&ana=e\\_SL\\_me&=31646388&senddate=2023-05-31](https://www.bizjournals.com/stlouis/news/2023/05/30/remote-work-hybrid-housing-costs-mortgage-move.html?utm_source=st&utm_medium=en&utm_campaign=me&utm_content=SL&ana=e_SL_me&=31646388&senddate=2023-05-31)

1-09 U.S. Census Bureau, American Community Survey 1-year estimates, 2022 (S0702).

1-10 Knight Foundation, & Gallup. (2020). Community ties: Understanding what attaches people to the place where they live. <https://knightfoundation.org/wp-content/uploads/2020/05/Community-Ties-Final-pg.pdf>

# Map 1-01. Population Change, 2010-2020

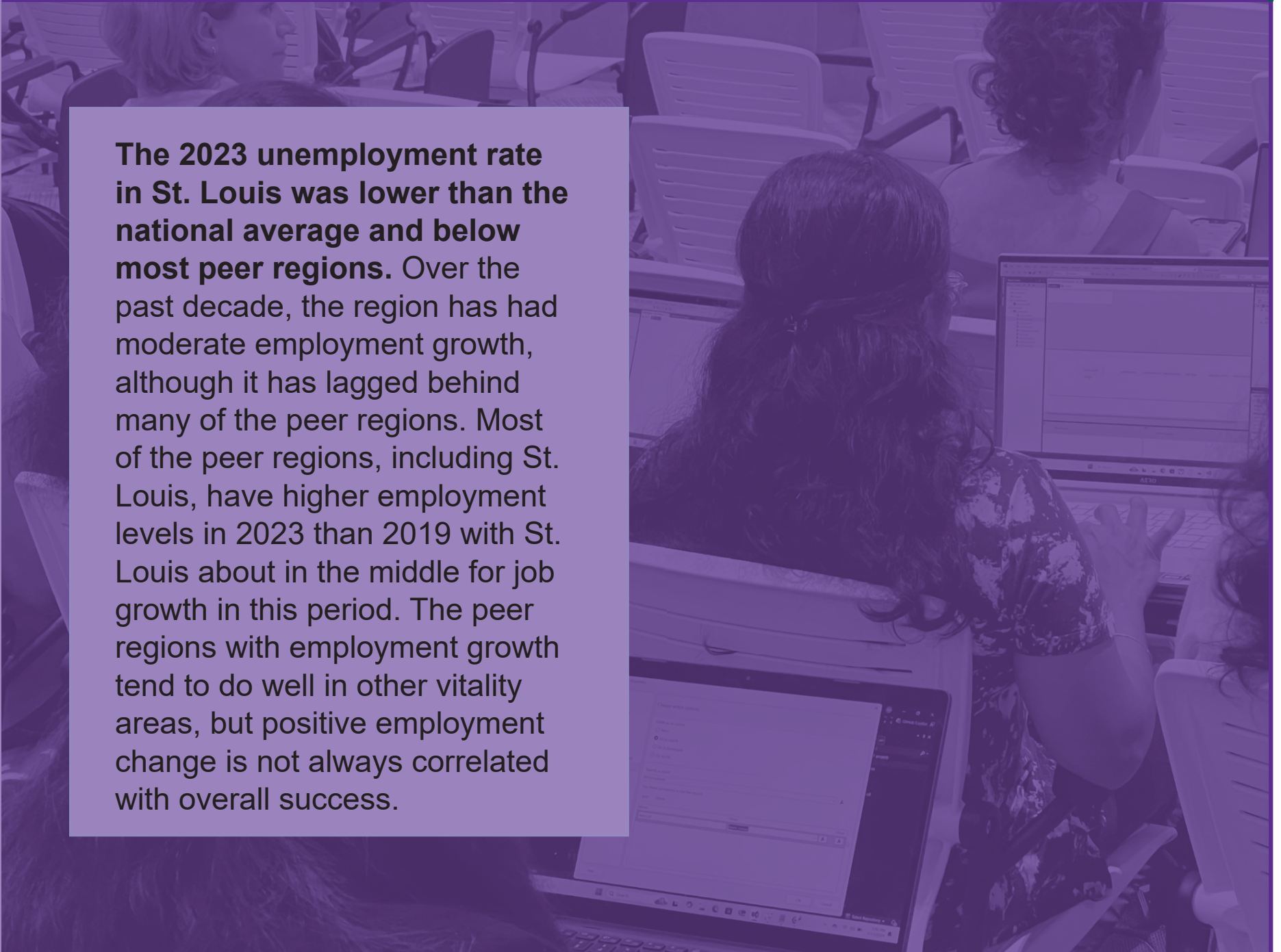


Source: U.S. Census Bureau, 2020 State Residing Data (Public Law 94-17) Summary File Illinois, Missouri; East-West Gateway Council of Governments



# Employment

**The 2023 unemployment rate in St. Louis was lower than the national average and below most peer regions.** Over the past decade, the region has had moderate employment growth, although it has lagged behind many of the peer regions. Most of the peer regions, including St. Louis, have higher employment levels in 2023 than 2019 with St. Louis about in the middle for job growth in this period. The peer regions with employment growth tend to do well in other vitality areas, but positive employment change is not always correlated with overall success.



# Measuring Success: Employment

**What is being measured?** There are at least four data sources on regional employment levels. In this WWS publication we use each source for different purposes. The following are some of the details important to this discussion, but there are plenty of nuances and differences between these sources. For more, please see the employment working paper on the EWG website.

The Bureau of Labor Statistics (BLS) Local Area Unemployment Statistics (LAUS) is used for unemployment rates. It differs from the other sources by using place of residence, rather than place of employment.

BLS Current Employment Statistics (CES) was selected as the primary employment measure for this publication for three reasons: It is more current than Bureau of Economic Analysis (BEA) data, it contains the least data suppression which enables analysis of industry trends, and it has a broader definition of payroll employment than BLS Quarterly Census of Employment and Wages (QCEW).

The EWG regional analysis uses QCEW and BEA employment estimates because they are the only two sources that have county-level data.

## **What makes these good measures of success?**

Most income is derived from employment. Therefore, an increase in employment is directly related to the ability of individuals and households to earn the money needed to meet basic needs and save for future needs.

A growing number of jobs in a region may indicate increasing opportunities for individuals and households to accumulate wealth.

A low unemployment rate is a sign of a healthy economy, while a high rate indicates the region is not offering enough jobs for the workforce or that there is a mismatch in skills and other factors between those seeking employment and job openings.

## **What is problematic about these measures?**

The metrics do not consider the quality of jobs, such as wage levels, health insurance, and potential for advancement; the needs of residents, such as hours and accessibility; or whether the skills and education of existing residents match the jobs.

Among the peer regions, employment growth is not correlated with income growth.

Additional jobs may lead to an increase in pollution, congestion, housing costs, and demands on public infrastructure and services.

As measured by CES, employment counts consider only wage and salary jobs, omitting proprietors' employment (those who own a business).

Unemployment rates do not count people who have given up on job searches and dropped out of the labor force or those who desire additional hours.

The selection of the time period for analysis may affect results. A 1-year analysis may show the latest trends but may also turn out to be a statistical fluke. While a 10- or 15- year trend may be more stable, it may also lack timeliness.

A small amount of unemployment exists even in healthy labor markets due to job searches. A very low unemployment rate could be associated with labor shortages, which pose challenges for businesses.

## **What Makes a Region Successful?**

Thoughts from a survey of St. Louis region residents

*“Employment & educational venues should be robust, with opportunities that attract investor dollars and a bright, energetic work force.”*

—St. Charles County Resident

*“It all starts with drawing and growing jobs. I don’t think a region can successfully grow employment unless the major regional institutions are aligned and unified on a common vision.”*

—St. Louis County Resident

# Peer Region Analysis: Employment

Employment is above pre-pandemic levels in 38 of the peer regions as well as nationally. Gains were not even across the country but followed longer term trends.

Regions in the South and the West continued to be the fastest growing, although not all metros located in the Sunbelt are growing quickly. Both from 2010 to 2023 and from 2019 to 2023, 12 regions in the South and West experienced the fastest employment growth. These regions also tend to have strong population growth, including in their central cities, and relatively low levels of income inequality.

Most Midwest peer regions experienced smaller gains than the national average in both time periods. **St. Louis** fared better in the pandemic recovery and that recovery was average among the peer regions. In contrast, it ranked

41st when measured over the longer time period.

Almost a third of the peer regions experienced net job loss from 2019 to 2023, indicating that they did not fully recover jobs lost during the pandemic. Regions that remained more than 1% below 2019 employment levels were also among the 13 peer regions with the slowest employment growth prior to the pandemic (2010 to 2019). The other five regions that have not fully recovered from the pandemic were among the 15 peer regions with the steepest declines in jobs from 2019 to 2020, all with more than a 7% decrease.

Regions with employment growth tend to do well in other vitality areas, but employment change does not have a direct relationship with a region's overall success or challenges. Further, it is important to consider how much new jobs pay and who is being hired for them.



Technology industries drove rapid employment growth in Raleigh and Austin, while transportation and logistics was the main driver in Riverside. For more, see WWS Case Studies: [www.ewgateway.org/wws](http://www.ewgateway.org/wws)

## Change in Employment

Percent change, 2019-2023

1	Austin	19.0
2	Raleigh	12.9
3	Dallas	11.6
4	Nashville	10.6
5	Tampa	10.5
6	Phoenix	10.3
7	Orlando	9.5
8	Jacksonville	9.2
9	Salt Lake City	8.8
10	Charlotte	8.4
11	Las Vegas	8.3
12	Riverside	8.2
13	San Antonio	7.9
14	Houston	6.8
15	Atlanta	6.7
16	Miami	6.5
17	Indianapolis	6.2
18	Denver	5.8
19	Oklahoma City	5.4
20	Sacramento	5.0
21	Richmond	3.7
22	Columbus	3.6
<b>United States</b>		<b>3.4</b>
23	Kansas City	3.3
24	San Diego	3.3
25	Philadelphia	3.2
26	Cincinnati	3.1
27	Birmingham	3.0
28	Louisville	3.0
29	Seattle	1.8
30	<b>St. Louis</b>	<b>1.6</b>
31	Virginia Beach	1.2
32	Portland	1.2
33	New York	0.9
34	San Jose	0.8
35	Washington, D.C.	0.6
36	Memphis	0.6
37	Chicago	0.5
38	Providence	0.0
39	Los Angeles	-0.2
40	Detroit	-0.2
41	Boston	-0.6
42	Minneapolis	-0.7
43	San Francisco	-1.0
44	Hartford	-1.2
45	Baltimore	-1.4
46	Milwaukee	-1.6
47	Cleveland	-1.7
48	Buffalo	-2.1
49	Pittsburgh	-2.5
50	<b>New Orleans</b>	<b>-3.4</b>

Source: Bureau of Labor Statistics, Current Employment Statistics

## Change in Employment

Percent change, 2010-2023

1	Austin	69.6
2	Nashville	51.6
3	Orlando	47.2
4	Raleigh	46.6
5	Riverside	45.9
6	Dallas	44.2
7	Phoenix	42.1
8	Charlotte	41.3
9	Las Vegas	39.7
10	Salt Lake City	39.5
11	Tampa	38.6
12	Jacksonville	36.4
13	Denver	36.3
14	San Antonio	35.9
15	Atlanta	34.2
16	Miami	32.3
17	San Jose	32.3
18	Houston	31.5
19	Sacramento	29.0
20	San Francisco	28.0
21	Seattle	27.6
22	Indianapolis	27.2
23	Portland	26.6
24	Columbus	25.4
25	San Diego	25.1
26	Oklahoma City	22.9
27	Richmond	20.4
<b>United States</b>		<b>19.7</b>
28	Louisville	19.5
29	Los Angeles	17.5
30	Cincinnati	17.5
31	Kansas City	17.4
32	Detroit	17.3
33	New York	16.9
34	Boston	15.4
35	Minneapolis	15.0
36	Philadelphia	14.1
37	Birmingham	14.0
38	Washington, D.C.	12.9
39	Chicago	12.8
40	Memphis	11.1
41	<b>St. Louis</b>	<b>10.9</b>
42	Baltimore	10.5
43	Providence	10.2
44	Virginia Beach	9.5
45	Cleveland	7.2
46	Milwaukee	6.5
47	New Orleans	6.1
48	Hartford	5.3
49	Buffalo	3.3
50	<b>Pittsburgh</b>	<b>3.1</b>

Source: Bureau of Labor Statistics, Current Employment Statistics



Employment growth is associated with some positive regional outcomes among the peer regions, including access to amenities such as vehicles, computers, and the Internet. Some regions combined fast employment growth with high education levels and wages. Austin, Raleigh, Dallas, and Charlotte were among the 10 fastest-growing regions for employment from 2010 to 2023 and were also above the national average on wage per job and college attainment.

However, fast employment growth does not guarantee positive outcomes on other metrics. **Orlando, Las Vegas, and Riverside** have consistently experienced robust job growth, but are in the bottom 10 on per capita income and are below the national average on college attainment and wages.

Slow employment growth does not guarantee low performance on other metrics. Regions such as **Boston, San Francisco, San Jose, Minneapolis, and Seattle** have seen below average job growth, but are above average on several metrics, including income, educational attainment, and well-being score.

Employment growth is not always associated with low unemployment. **Las Vegas, Riverside, Sacramento, and Houston** were among the eight regions with the highest unemployment rates despite having higher employment growth than most of the peer regions. Such a situation can occur when migrants or new entrants to the workforce are hired for a large proportion of jobs, or when a region has high rates of job turnover.

Employment growth can occur without direct benefits to current residents. **St. Louis** residents who were born and remain in the MSA earn, on average, lower incomes than those who were born elsewhere in the country as well as those who were born and migrated here from other countries.<sup>2-01</sup> Research commissioned by the James S. McDonnell Foundation shows that education levels are higher for **St. Louis** residents who were born elsewhere than for individuals born in the region.<sup>2-02</sup>

2-01 In the St. Louis MSA, full-time workers who were born in Missouri or Illinois earn, on average, \$70,098. People who move from elsewhere in the United States earn \$90,162, while full-time workers who were born in other countries earn \$79,551. Source: U.S. Census Bureau, 1-Year American Community Survey Public Use Microdata Sample accessed through IPUMS USA, University of Minnesota, www.ipums.org.  
2-02 Benner, Chris & Manuel Pastor. 2024. Looking Forward: Inclusion, Prosperity, & Community in a Changing St. Louis.

## Unemployment Rate

Unemployed individuals who are looking for work as a percent of the labor force, 2023

1	<b>Las Vegas</b>	<b>5.4</b>
2	Riverside	4.7
3	Los Angeles	4.7
4	New York	4.4
5	Chicago	4.3
6	Sacramento	4.3
7	Houston	4.2
8	Memphis	4.0
9	San Diego	3.9
10	Buffalo	3.8
11	New Orleans	3.8
12	Dallas	3.7
13	Hartford	3.7
14	San Antonio	3.7
15	San Francisco	3.7
16	Cleveland	3.7
17	Seattle	3.7
18	Louisville	3.7
	<b>United States</b>	<b>3.6</b>
19	Detroit	3.6
20	Philadelphia	3.6
21	Portland	3.6
22	San Jose	3.6
23	Phoenix	3.5
24	Pittsburgh	3.5
25	Austin	3.3
26	Cincinnati	3.3
27	Milwaukee	3.3
28	Charlotte	3.2
29	<b>St. Louis</b>	<b>3.2</b>
30	Providence	3.2
31	Denver	3.2
32	Atlanta	3.1
33	Columbus	3.1
34	Boston	3.1
35	Virginia Beach	3.1
36	Raleigh	3.0
37	Richmond	3.0
38	Oklahoma City	3.0
39	Jacksonville	3.0
40	Indianapolis	3.0
41	Tampa	3.0
42	Orlando	2.9
43	Kansas City	2.9
44	Minneapolis	2.7
45	Salt Lake City	2.7
46	Nashville	2.6
47	Washington, D.C.	2.6
48	Miami	2.5
49	Birmingham	2.3
50	<b>Baltimore</b>	<b>2.1</b>

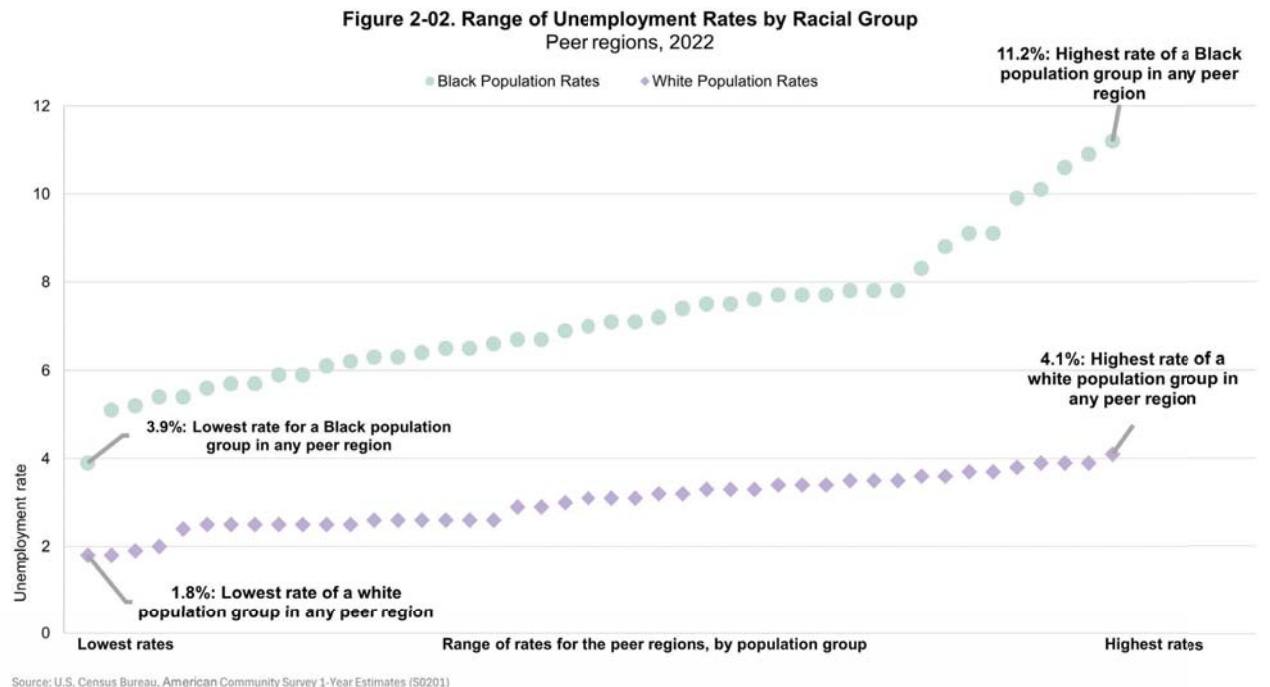
Source: Bureau of Labor Statistics, Local Area Unemployment Statistics

With the exception of the pandemic years, most of the peer regions have experienced annual increases in employment since 2010 and have low unemployment rates, but there are large racial and ethnic disparities.

None of the peer regions experienced dramatic drops in employment from 2010 to 2023. With the exception of 2019 to 2020, only four regions experienced one year-over-year decrease in the 13-year period, all with declines of less than 0.5%.

In 2023, each region had an unemployment rate lower than 5.5%, which is low compared to historical averages, as seen on Figure 2-01 and the WWS table on unemployment. However, in 2022, only four regions had white unemployment rates that were higher than the lowest Black unemployment rate. See Figure 2-02.

In **St. Louis**, the Black unemployment rate was more than three times higher than the rate for the white population, 8.6% and 2.4%, respectively.



# Employment by Industry

The industries that drove employment growth differed by region. Professional and business services was the fastest-growing industry nationally and in many regions, including **Orlando, Tampa, Austin** and **Raleigh**. The education and health industry group was the leading sector in **Phoenix** and **Jacksonville**. **Riverside's** employment growth was driven primarily by growth in transportation and logistics.

Nationally, four industries (professional and business services, health care and social assistance, transportation and warehousing, and construction) had the most robust growth both from 2010 to 2023 and from 2019 to 2023. See Table 2-01 and Figure 2-03.

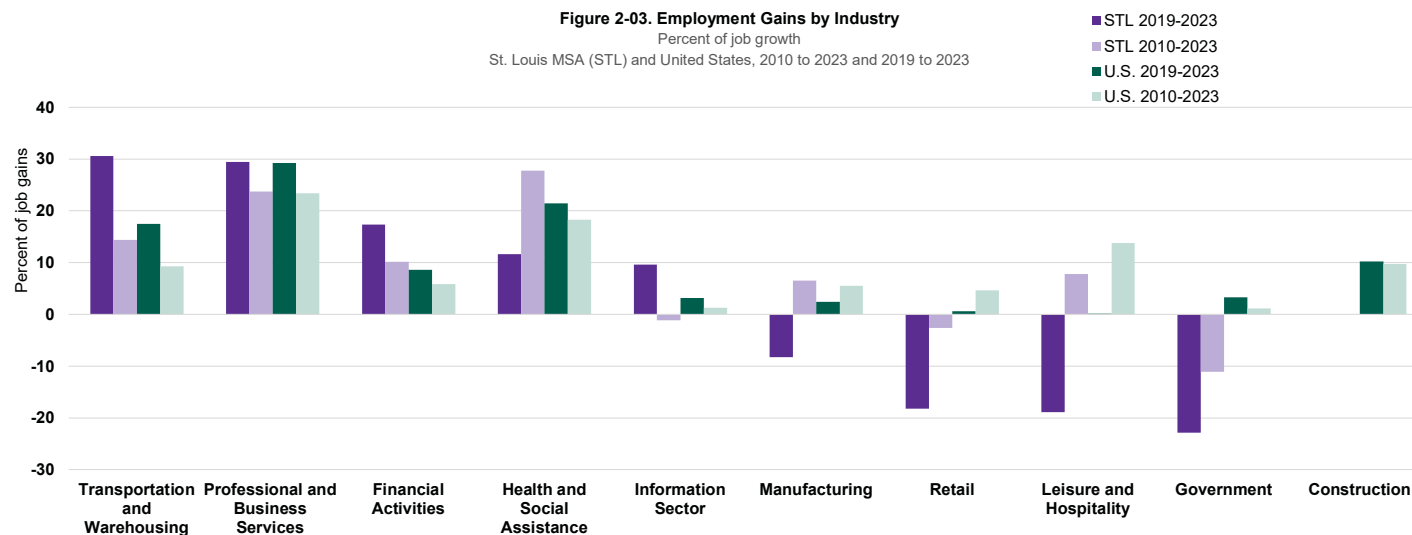
Professional and business services accounted for the most U.S. growth with 29.3% of job gains from 2019 to 2023 and 23.4% from 2010 to 2023. This industry was the third fastest growing from 2010 to 2023, increasing by 35.8% and becoming the largest sector. Often, jobs categorized here are connected to other large growth industries, such as information technology in Austin.

Transportation and warehousing was the fastest growing industry with a 15.9% increase in jobs from 2019 to 2023 (average annual 4%) and a 57.1% increase from 2010 to 2023 (average annual 4.4%). The industry also saw the smallest decrease from 2019 to 2022. Even with the substantial growth, the industry accounted for a relatively small (4.2%) proportion of U.S. employment in 2023.

United States, 2010, 2019, and 2023							
	Employment (in thousands)			Average Annual Percent Change			
	2010	2019	2023	2010-2019	2019-2020	2019-2023	2010-2023
Professional and Business Services	16,824	21,334	22,840	3.0	-4.5	1.8	2.8
Government	22,490	22,613	22,782	0.1	-2.8	0.2	0.1
Health and Social Assistance	16,820	20,421	21,524	2.4	-3.1	1.4	2.2
Leisure and Hospitality	13,049	16,586	16,593	3.0	-20.7	0.0	2.1
Retail	14,404	15,560	15,590	0.9	-4.8	0.0	0.6
Manufacturing	11,528	12,817	12,940	1.2	-5.1	0.2	0.9
Financial Activities	7,695	8,754	9,197	1.5	-0.6	1.3	1.5
Construction	5,518	7,493	8,018	4.0	-3.2	1.8	3.5
Transportation and Warehousing	4,179	5,665	6,565	3.9	-0.4	4.0	4.4
Information	2,707	2,864	3,027	0.6	-5.0	1.4	0.9
<b>Total Employment</b>	<b>130,345</b>	<b>150,904</b>	<b>156,051</b>	<b>1.8</b>	<b>-5.8</b>	<b>0.9</b>	<b>1.5</b>

Source: U.S. Bureau of Labor Statistics, Current Employment Statistics

Figure 2-03. Employment Gains by Industry  
Percent of job growth  
St. Louis MSA (STL) and United States, 2010 to 2023 and 2019 to 2023



Source: U.S. Bureau of Labor Statistics, Current Employment Statistics



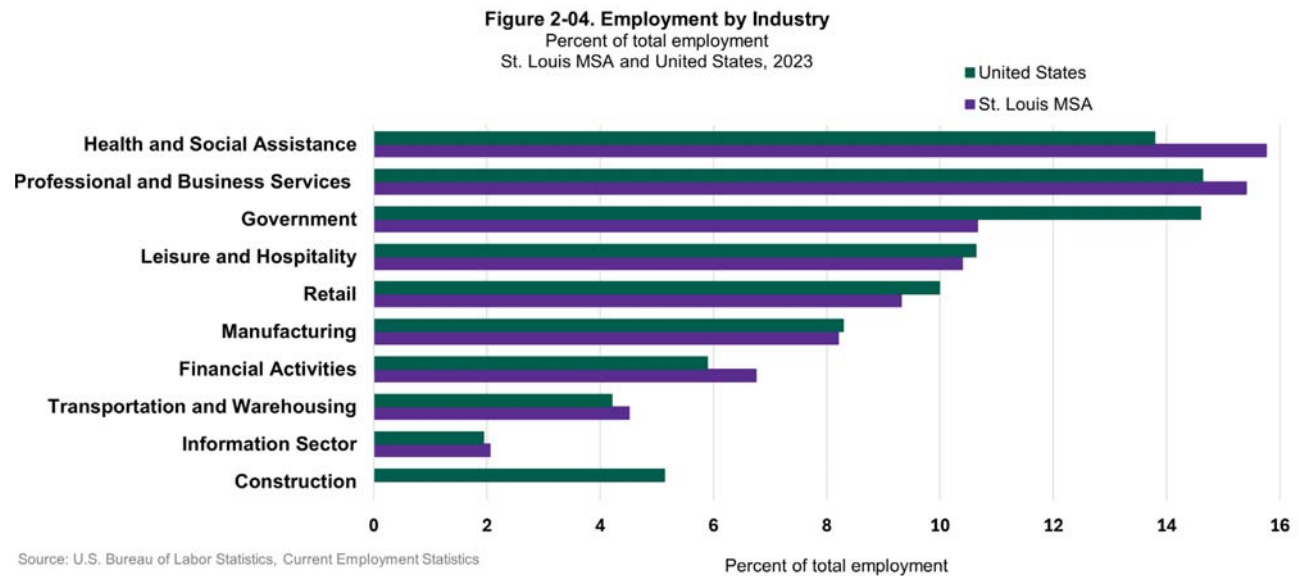
The largest industries in the St. Louis MSA are similar to the largest industries nationally. Health care and social assistance is the largest employer in the MSA, accounting for 15.8% of jobs. The professional and business services industry ranks closely behind, accounting for 15.4% of employment. See Table 2-02 and Figure 2-04.

In the nine years leading up to the pandemic, the region experienced an annual average increase of 1% in employment. From 2019 to 2023, the average was less than half that, 0.4% but included a loss of 5.3% in 2020.

Most sectors had recovered from pandemic losses as of 2023, but jobs in government, leisure and hospitality, retail, and manufacturing were lower than in 2019. Government was on the decline prior to the pandemic but the other three had seen increases in employment from 2010 to 2019. The transportation and warehousing industry was the only industry that grew from 2019 to 2020, by 7.9%, compared to an annual average of 3.4% in the prior nine years.

	Employment			Average Annual Percent Change			
	2010	2019	2023	2010-2019	2019-2020	2019-2023	2010-2023
Health and Social Assistance	186,142	222,667	225,267	2.2	-3.7	0.3	1.6
Professional and Business Services	186,783	213,592	220,167	1.6	-3.6	0.8	1.4
Government	168,025	157,467	152,367	-0.7	-3.6	-0.8	-0.7
Leisure and Hospitality	137,558	152,733	148,525	1.2	-21.5	-0.9	0.6
Retail	136,858	137,200	133,142	0.0	-5.7	-0.8	-0.2
Manufacturing	108,017	119,075	117,233	1.1	-4.4	-0.4	0.7
Financial Activities	82,217	92,625	96,500	1.4	-1.1	1.1	1.3
Transportation and Warehousing	44,242	57,667	64,483	3.4	7.9	2.7	3.5
Information Sector	30,858	27,167	29,317	-1.3	-5.8	2.1	-0.4
<b>Total Employment</b>	<b>1,288,125</b>	<b>1,406,683</b>	<b>1,428,992</b>	<b>1.0</b>	<b>-5.3</b>	<b>0.4</b>	<b>0.8</b>

Source: U.S. Bureau of Labor Statistics, Current Employment Statistics



# EWG Region Analysis: Employment

Federal employment data present an ambiguous view of employment trends in the EWG region with CES and BEA showing an increase, and QCEW indicating a decrease in recent years. The two estimates appear to vary in part because of differences in the types of jobs included in their estimates.

This section provides an overview of the data sources and how they differ as well as the data from both sources. For a greater understanding of the nuances of this data, see Box 2-01 (Page 16). For even more detail, see the working paper at [www.ewgateway.org/www](http://www.ewgateway.org/www)

The two sources that provide county-level data generally suggest that employment in the region has increased since 2019. Yet, there are differences in county-level trends, and the two data sources provide different pieces to the overall portrait.

Table 2-03 provides employment estimates reported by BEA, including both proprietors (business owners) and payroll employment for 2019 and 2022.

Table 2-04 provides employment estimates as reported by QCEW. Unlike BEA, this data is only for payroll employment because QCEW only includes employment that is covered by the Unemployment Insurance (UI) program. Data is shown for 2019 to 2022 to allow a comparison with BEA. Data is also provided for 2023, to offer a timelier estimate, although this data is subject to revision. As of September 2024, the 2023 data went through an initial revision in June and will undergo a final revision in February 2025.

**Table 2-03. U.S. Bureau of Economic Analysis (BEA) Employment Estimates**

East-West Gateway (EWG) region by county, 2019 and 2022

	Total Employment (Payroll and Proprietors)		Percent Change, 2019-2022
	2019	2022	
Madison	132,901	139,190	4.7
Monroe	13,086	14,092	7.7
St. Clair	126,959	130,305	2.6
Franklin	55,522	57,273	3.2
Jefferson	73,567	77,610	5.5
St. Charles	210,374	227,982	8.4
St. Louis	805,614	829,047	2.9
City of St. Louis	291,562	297,058	1.9
<b>EWG Region</b>	<b>1,709,585</b>	<b>1,772,557</b>	<b>3.7</b>
<b>St. Louis MSA</b>	<b>1,790,759</b>	<b>1,858,091</b>	<b>3.8</b>

Source: U.S. Bureau of Economic Analysis

**Table 2-04. Quarterly Census of Employment and Wages (QCEW) Employment Estimates**

East-West Gateway (EWG) region by county, 2019, 2022, and 2023

	Total Employment (Payroll only)			Percent Change		
	2019	2022	2023	2019-2022	2019-2023	2022-2023
Madison	101,531	101,735	103,506	0.2	1.9	1.7
Monroe	8,456	8,560	8,590	1.2	1.6	0.4
St. Clair	92,156	89,032	90,028	-3.4	-2.3	1.1
Franklin	39,539	38,337	38,852	-3.0	-1.7	1.3
Jefferson	47,947	47,493	48,403	-0.9	1.0	1.9
St. Charles	151,936	155,852	160,581	2.6	5.7	3.0
St. Louis	610,438	589,994	597,676	-3.3	-2.1	1.3
City of St. Louis	229,800	222,214	223,562	-3.3	-2.7	0.6
<b>EWG Region</b>	<b>1,281,803</b>	<b>1,253,217</b>	<b>1,271,198</b>	<b>-2.2</b>	<b>-0.8</b>	<b>1.4</b>
<b>St. Louis MSA</b>	<b>1,334,155</b>	<b>1,305,367</b>	<b>1,324,353</b>	<b>-2.2</b>	<b>-0.7</b>	<b>1.5</b>

Source: U.S. Bureau of Labor Statistics, Quarterly Census of Employment and Wages (QCEW)

Figures 2-05 through 2-13 provide the same data plus the data separately for the two types of employment included in the BEA data – proprietors and payroll.

The following are some of the key findings:

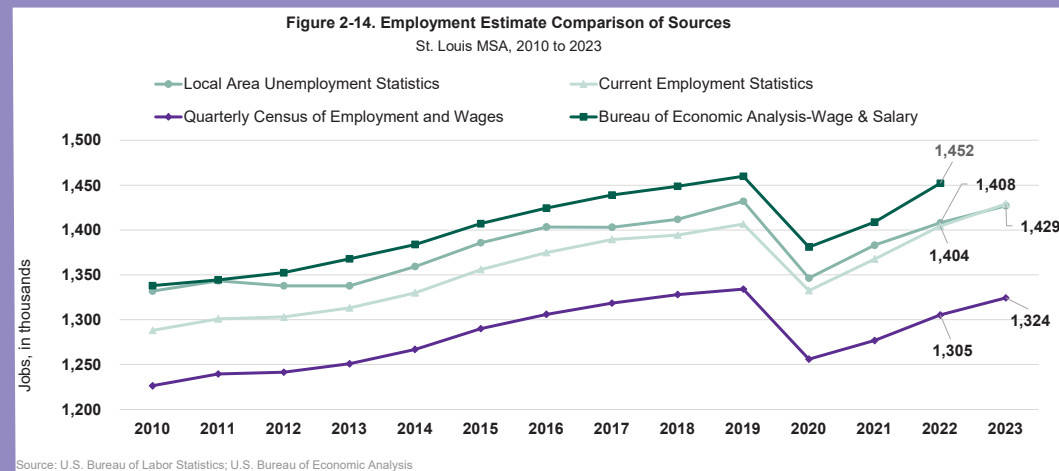
- Payroll employment for the region had not returned to pre-pandemic levels in 2022 (based on both sources), nor has it rebounded based on preliminary 2023 data from QCEW.
- Compared to pre-pandemic employment levels, payroll employment growth has been strongest in St. Charles and Madison counties with both sources indicating growth from 2019 to 2022.
- The region as a whole and each county saw increases in payroll employment from 2022 to 2023, although half of the counties had not returned to pre-pandemic employment levels.
- Business ownership increased substantially in each county of the region and the region as a whole. This has offset some of the losses experienced since the onset of the pandemic. This employment makes up about 21% of regional employment.

### Box 2-01: Employment Data for St. Louis MSA, Comparison of Sources

QCEW and CES data available as of September 2024, show opposite trends for the period 2019-2023 in the St. Louis MSA. CES shows a gain of about 22,000 jobs from 2019 to 2023, while QCEW shows a loss of nearly 10,000.

It is not possible at this juncture to determine how much of this difference is attributable to differences in the types of jobs covered by the two sources, and how much is attributable to a lag in integrating QCEW counts into CES estimates (which will be published in February 2025). The foregoing analysis of trends in the United States and in the peer regions was based on CES, for reasons explained in the working paper available at [www.ewgateway.org/www](http://www.ewgateway.org/www).

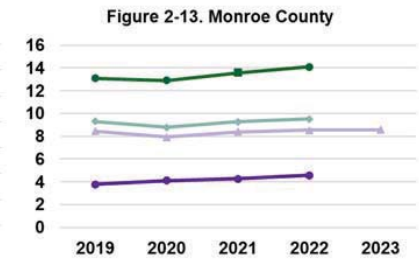
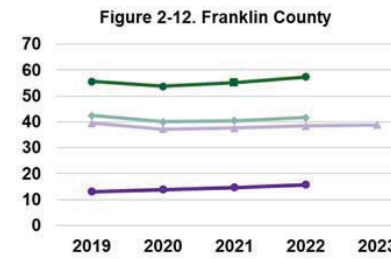
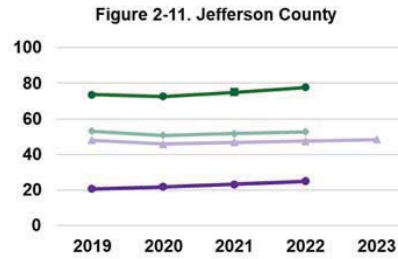
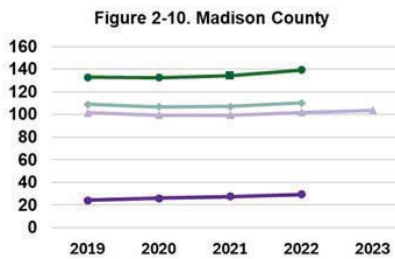
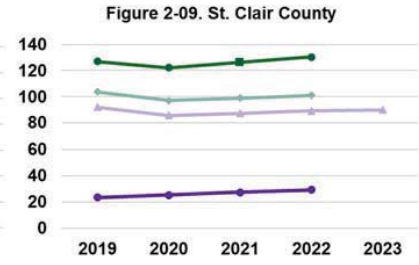
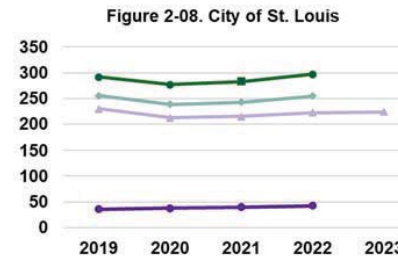
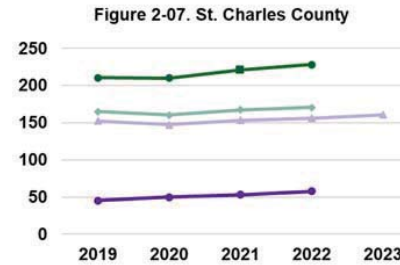
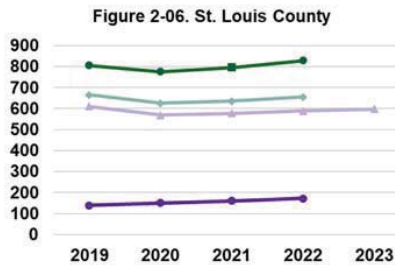
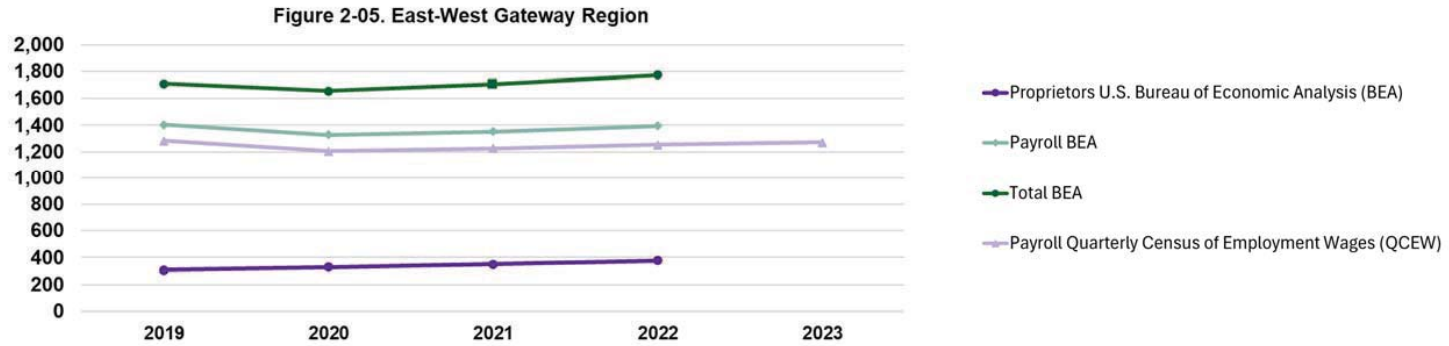
Figure 2-14 shows payroll employment from the four sources of employment data for the St. Louis MSA for the period 2010 to 2023. These sources are described on Page 9.





## Figures 2-05 to 2-13. Employment (in thousands) by Type and Source Comparison, 2019 to 2023

Note: Scales on figures differ.



Source: U.S. Bureau of Economic Analysis (BEA); U.S. Bureau of Labor Statistics (BLS), Quarterly Census of Employment and Wages (QCEW).

# Growth

**What are our goals and performance measures for growth?** The following are the goals and performance measures established in East-West Gateway's long-range transportation plan (LRP), 2030 Measuring Progress from Greater St. Louis Inc. (GSL), and OneSTL's regional plan for sustainability.

GSL includes population growth as one of four north star metrics with a 2030 target of increasing population by 180,000. The agency recognizes that population growth “drives a thriving regional economy” and that racial equity and inclusion are needed for a strong community. The agency tracks total population, net migration (domestic and international), and characteristics of the population, including age, race/ethnicity, and by county.

GSL recognizes that employment and population growth are intertwined, stating, “Businesses make expansion and location decisions based on access to talent. Good employment opportunities can draw and retain people in the region. An inclusive labor force strengthens households, communities, and businesses.” The agency tracks employment growth in total and by industry, labor force growth, unemployment by race and ethnicity, and labor force growth by county.

The LRP also has several metrics of growth, including regional employment as a measure of economic vitality, noting the importance of an integrated transportation network for supporting businesses and the economy. The agency also tracks the employment and population living in the central core as a measure of a vibrant downtown and central core, stating, “The core is the economic and cultural hub of the region and a major tourist attractor. Thus, the health of the core is an indicator of the health of the entire region.” The LRP has aligned its definition of the core with that used by GSL in the STL2030 Jobs Plan, which cites a weak core as a central barrier to regional economic growth.

OneSTL recognizes prosperity as an integral part of a sustainable region, measuring total employment and the unemployment rate for the region under the theme of prosperous. The program also looks at specific aspects of employment, including access to jobs, and has a goal to increase population and employment around transit stations.

**What are we doing for growth?** The following are a sampling of activities, programs, plans, and studies.

The **International Institute of St. Louis** is a nonprofit organization dedicated to helping immigrants and refugees settle in the St. Louis region. They provide services such as language education, job placement, and cultural orientation to facilitate the integration of new residents into the community.

The **St. Louis Mosaic Project** launched in 2012 in response to an economic impact report authored by economist Jack Smith from St. Louis University. The report showed St. Louis lagging in immigrant growth and highlighted the economic benefits of increasing the foreign-born population. The program's goals are to transform St. Louis into the fastest growing major metropolitan area for immigration by 2025, to design and support regional attraction strategies, and to promote regional prosperity through immigration and innovation.

The **St. Louis Federal Reserve** provides analysis of population trends, including *Why Is the St. Louis Metro Area Population Growing So Slowly?*, which identifies economic factors, such as productivity and quality of life as key reasons for outward migration from the St. Louis region. Another article, *How Does St. Louis-Area Immigration Differ from National Trends?*, compares immigration trends in St. Louis to national patterns, revealing that St. Louis has a much smaller share of foreign-born residents compared to the national average.





*Economic and Demographic Trends* by the **Missouri Economic Research and Information Center (MERIC)** provides detailed analysis of population changes within the city of St. Louis, including migration patterns and demographic shifts.

**St. Louis Community College** publishes annual State of the St. Louis Workforce reports that includes a survey of businesses. The 2024 report found that the greatest barrier to filling positions is a shortage of qualified workers.

**The STL 2030 Jobs Plan** is a 10-year roadmap to guide the region in increasing the number of quality jobs that pay living wages while reducing racial disparities in employment and wealth generation. The plan outlines five strategies to drive inclusive growth.

The **Hispanic Chamber of Commerce of Metro St. Louis** provides tools, training, and support to increase business ownership among Hispanic and Latino persons in the St. Louis region. The organization hosts an annual jobs fair, pop up events, and other networking opportunities that meet the needs of their members.

**Advanced Manufacturing Innovation Center- St. Louis (AMICSTL)** is a collaboration of hundreds of companies seeking to increase advanced manufacturing in the St. Louis region by connecting training and workforce development with the future job market. The organization seeks to improve the ecosystem for manufacturing companies and better prepare the regional workforce for these relatively high paying jobs.

**The GeoFutures Coalition** brings together academic, industry, and government initiatives in support of the growth of the geospatial ecosystem in St. Louis, which already consists of 350 companies. The growing ecosystem includes NGA West, the Taylor Geospatial Institutes, and 80 geospatial companies, as well as workforce development programs, accelerator programs, and applied research projects.

The **Where We Stand** series tracks population and employment trends in the St. Louis region. Recent publications highlighted the change in population from 2010 to 2020, including the change in the racial and ethnic composition of communities. Updates on population estimates for 2018, 2019, and 2020 tracked the slow regional population growth. Another update reviewed the employment changes during the COVID-19 pandemic, how the changes compared to previous recessions and the effects on different industries and population groups, including a specific look at the effect on working-parent households.

**What else is St. Louis doing?** *Tell us what to add to the database of regional goals, performance measures, activities, plans, programs, and studies at [www.ewgatewayorg/wws](http://www.ewgatewayorg/wws)*