

The State of Working Missouri



November 2022

INTRODUCTION

Working Missourians are the engines of our economy, supplying the products and services we all use in our daily lives. They harvest the food we eat, build the homes we live in, and pave the roads we drive on; they keep our communities safe, provide our families with state-of-the-art health care and quality education. It is through the labor of Missourians that we develop strong communities where opportunity is possible for everyone.

Missourians believe that when you work hard, you ought to be able to get ahead – to keep a roof over your head, put food on the table, and save a little for a rainy day. Unfortunately, millions of working Missourians know that despite their work, they're still struggling to afford the basics and are just one paycheck away from crises.

The State of Working Missouri provides an overview of information on wages and employment to illustrate what's happening in our state's labor market and how our workers are faring. Overall, the data show that recent modest gains for workers are not sufficient to materially improve their lives. Moreover, many working families are struggling to make ends meet and are just one emergency away from financial disaster. The report also underscores that even when circumstances improve generally, Black and female workers continue to face tougher economic headwinds than their white and male counterparts.

We hope that this report can serve as a starting point to develop policy recommendations for building an economy that works for everyone.

Disaggregating Data by Race/Ethnicity

The COVID-19 pandemic revealed glaring racial and ethnic inequalities throughout Missouri's health, economic, and social systems. While there is widespread evidence of access barriers to the labor market for Hispanic and Latinx, American Indian, Alaska Native, Asian American, and Pacific Islander populations, detailed data for these populations is often publicly inaccessible. Additionally, due to their smaller sample sizes, estimates for these groups may be less reliable. This is noted throughout the report when applicable.

Missouri Budget Project is a member of the Economic Analysis and Research Network (EARN), a network affiliated with the Economic Policy Institute (EPI), a nonpartisan public policy think tank that centers the needs of low- and middle-wage workers in economic policy discussions. Missouri Budget Project has produced the State of Working Missouri report using data and research from EPI and EARN, as well as other sources, and we appreciate their support. Additionally, we thank Missouri Jobs with Justice for their valuable advice, solicitation of worker input, and collaboration on this report.

WAGES

For workers managing their household budgets, wages are one of the most important ways to judge the quality of a job. This section first provides a perspective on wage growth over time at the national level, then uses recent state level wage and economic data to examine how working Missourians are faring, especially post-COVID.

NATIONAL WAGE TRENDS

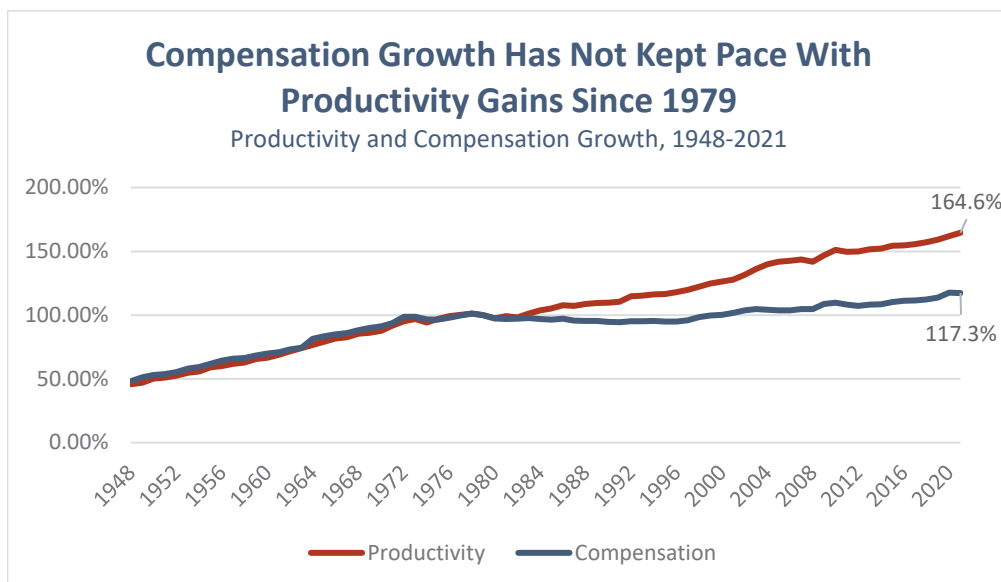
Wages Have Been Flat Despite Strong Economic Growth

Economic Gains Have Shifted Towards Corporate Profits, CEO Compensation

The Link Between Productivity and Pay Has Long Been Broken

It used to be that as the economy grew, business owners and workers alike shared the benefits. In the post-World War II era, as productivity increased (that is, as more income was generated across the economy as a whole), those gains were shared with many of the workers who helped produce it, and wages grew.

However, the link between productivity and pay has been broken. Until 1979, pay and productivity grew together. Since then, productivity grew nearly 4 times faster than the rate of pay – and the benefits of economic growth are now mostly found in corporate profits and pay for those at the top.ⁱ



Source: Economic Policy Institute, epi.org/productivity-pay-gap/

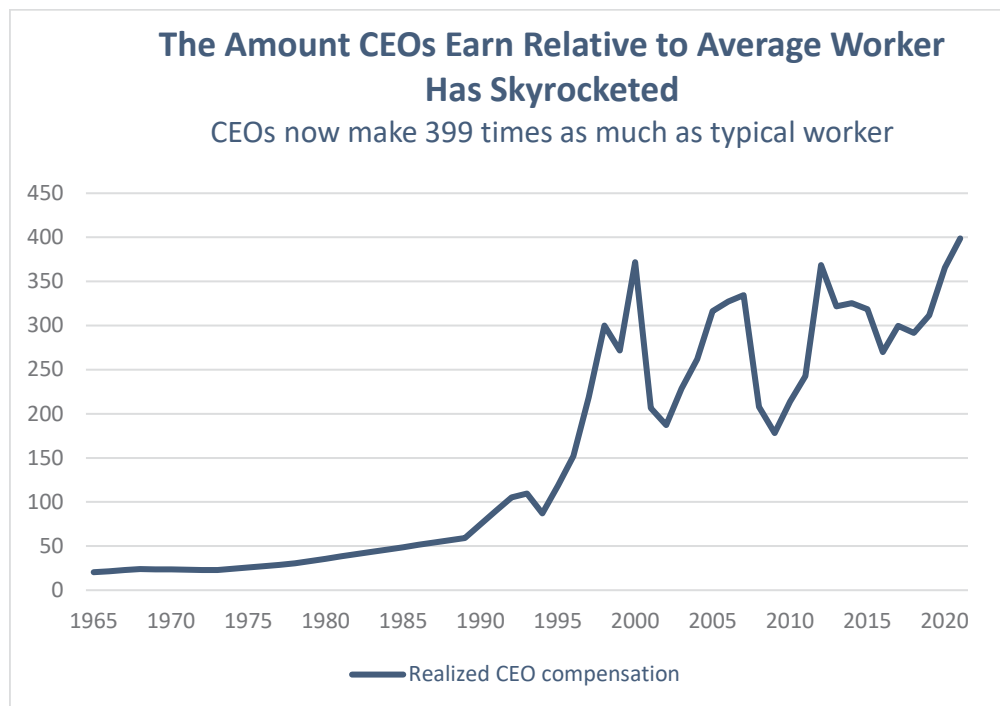
From 1948 - 1979, productivity and compensation were tightly linked.

In the last generation, productivity increased nearly 65% - but wages only by 17%.

It is important to recognize that not all Americans shared equally in postwar affluence. Black workers were excluded from many opportunities that allowed white workers to increase their earnings and build wealth, as were women and other workers of color in some cases. The effect of discriminatory policies is still seen in earnings and wealth today.

Meanwhile the Ratio of CEO to Worker Compensation Has Skyrocketed

Around the same time that the productivity-pay link was broken, there was a marked change in how much corporate CEOs were paid relative to the average worker. Taking into account the value of cashed in stock options in addition to salary, in 1965 the average CEO made about 20 times more than the average worker. By 1989, a typical CEO made 59.3 times more than a typical worker. The size of this disparity has increased rapidly since then, with CEOs being paid 399 times as much as a worker in 2021.ⁱⁱ



Source: Adaptation of Figure A from Josh Bivens & Jori Kandra, "CEO pay has skyrocketed 1,460% since 1978." October 4, 2022, Economic Policy Institute

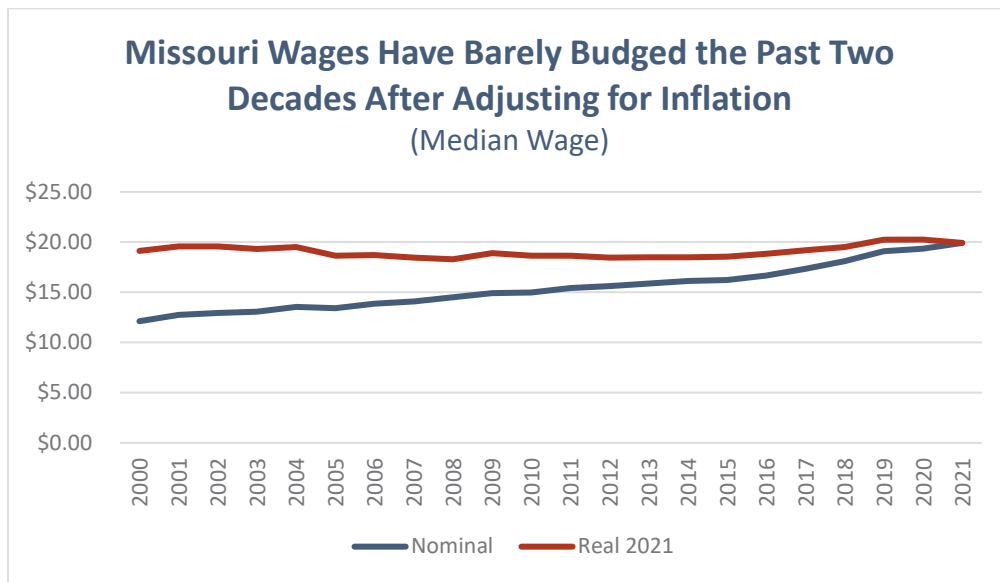
MISSOURI WAGE TRENDS

Missouri Workers Face Rising Inflation, Stagnant Wages

Median Wages in Missouri Have Been Stagnant

The disparity in compensation has left Missouri workers falling further behind. While the median wage in Missouri has nominally increased, the real value of those wages has been stagnant since the turn of the century. In 2000, a worker earning the median wage made \$12.12 an hour – the equivalent of \$19.13 after adjusting for inflation (in 2021 dollars).

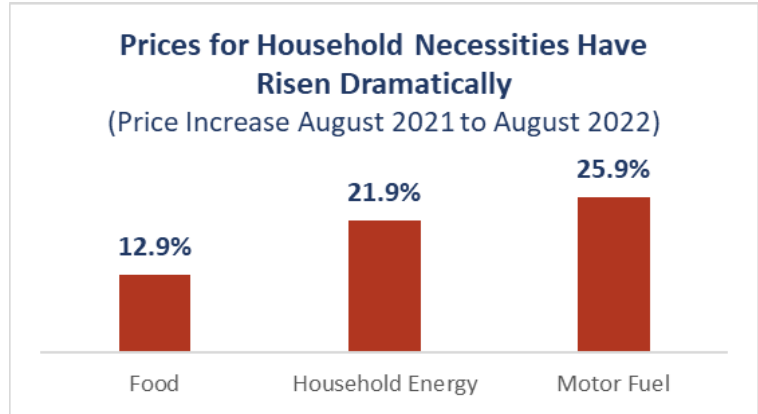
Earnings have barely budged since then. In 2021, a worker earning the median wage made just \$19.92 an hour, meaning half of Missouri workers earned more, and half earned less.ⁱⁱⁱ Nearly 1 of every 3 workers made about \$15 an hour or less.^{iv}



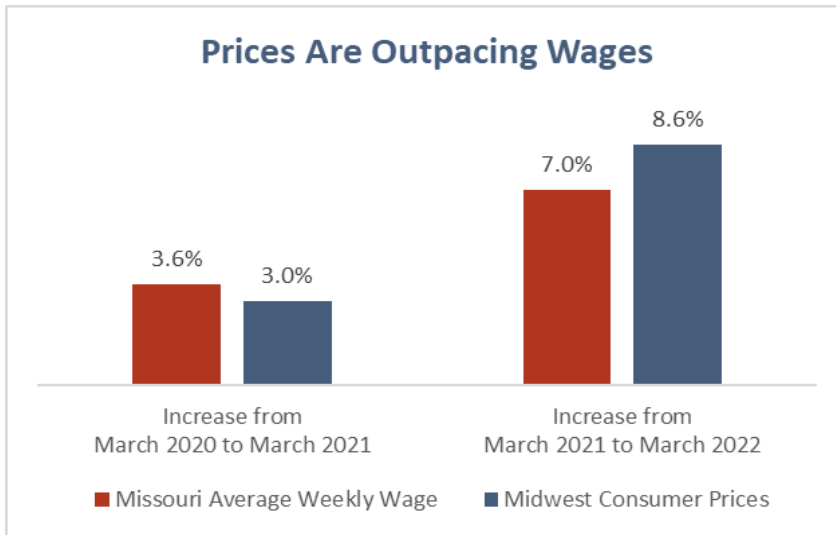
Source: EPI analysis of Current Population Survey microdata

The Post-Pandemic Period: Inflation is Taking a Bite Out of Workers' Pocketbooks

Recent inflationary growth is compounding the economic struggle for workers. Over the past year and a half, workers have seen a sharp increase in the prices of everyday household necessities, such as food, gas, and utilities. From August 2021 to August 2022, food prices rose 12.9% – the largest increase since February 1979.^v



Bureau of Labor Statistics, Midwest Region CPI-U August 12-month Percent Changes (Seasonally Unadjusted)



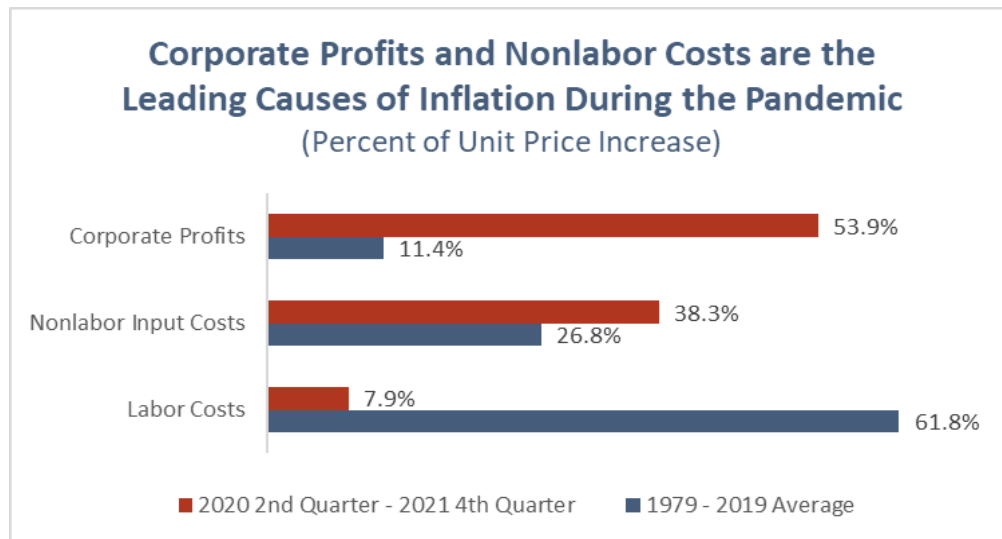
Sources: Wage data from U.S. Bureau of Labor Statistics, Quarterly Census of Employment and Wages (QCEW) State and County Map, 12 Month Percent Change in Average Weekly Wage, First Quarter 2021 and First Quarter 2022. Consumer prices from Bureau of Labor Statistics, Midwest Region CPI-U March 12-month Percent Changes (Seasonally Unadjusted).

While workers have seen pay increases since the pandemic, that wage growth has been relatively slow compared to rising consumer prices. This disparity indicates nonwage factors are the main reasons for the onset of this current wave of inflation.

Instead, inflation has largely been driven by corporate profits and supply chain issues – and it has diminished the wage gains workers have made over the past two years.

Corporate Profits Have Driven Inflation

Strikingly, the data indicate that it didn't have to be this hard. From 2020 through 2021, **nearly 54% of the increase in an item's price can be attributed to corporate profit**, followed by nonlabor costs (38%), and the cost of labor (8%).^{vi} This is the reverse of what one might expect to see compared to historical trends. In fact, as shown in the chart below, the rise in corporate profits during the pandemic has been extreme compared to the preceding 40 years.



Source: Adaptation of Figure A from Josh Bivens, "Corporate Profits Have Contributed Disproportionately to Inflation. How Should Policymakers Respond?" April 21, 2022, Economic Policy Institute

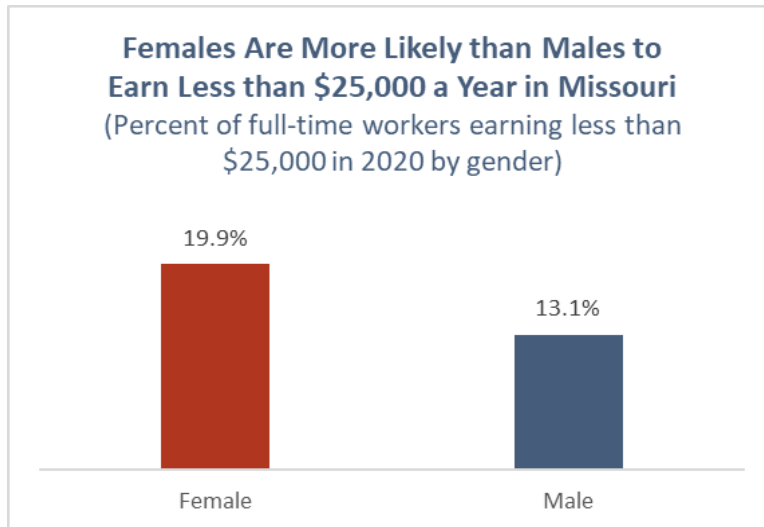
While corporate decisions have reaped skyrocketing profits, workers have not shared in the largesse. In addition, global product supply shortages and shipping issues caused by the COVID-19 pandemic continue to disrupt the supply of goods and services, resulting in higher consumer prices^{vii} that put an additional strain on households already living paycheck to paycheck. In July, nearly 40% of Missouri households had difficulty paying for usual household expenses, up from nearly 25% the previous year.^{viii}

Wages in Perspective: Minimum Wage Not Enough to Make Ends Meet

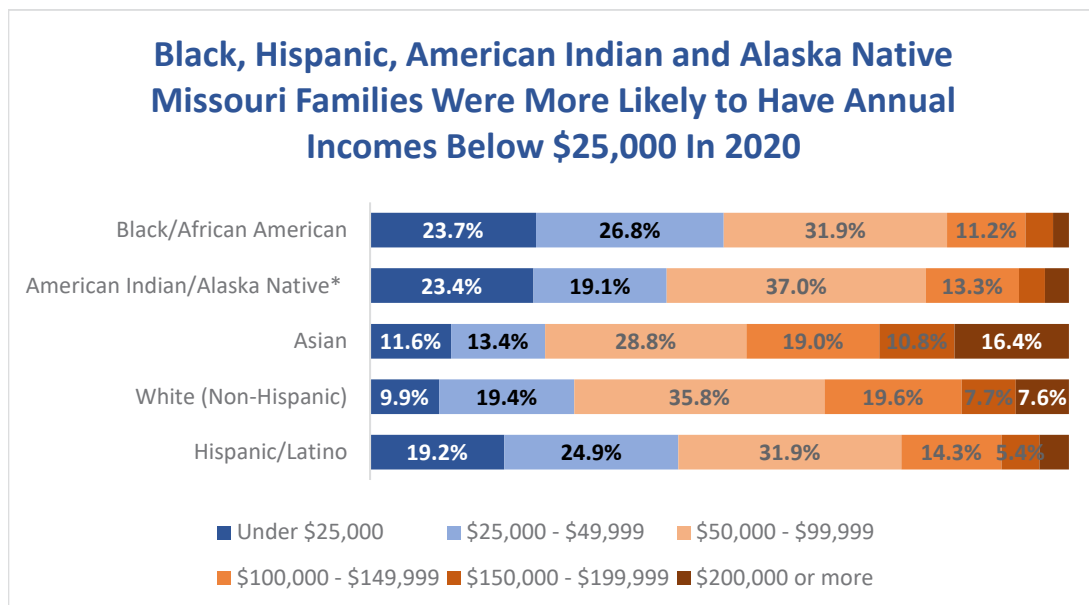
Missouri's current minimum wage is \$11.15 per hour.^{ix} In 2018, voters approved annual minimum wage increases until 2023, when the wage will be \$12 per hour. However, that is still only about half of what a working family of four needs to cover basic living expenses, according to the Massachusetts Institute of Technology Living Wage Calculator for Missouri.^x

Gender, Racial, and Occupational Disparities in Earnings

Overall wage metrics do not capture significant differences in the pay of men and women, or of workers by race. Specifically, women and workers of color are more likely to earn less than \$25,000 compared to men or white workers as a whole.



Source: U.S. Census Bureau, 2016-2020 American Community Survey 5-Year Estimates, Earnings In the Past 12 Months (In 2020 Inflation-Adjusted Dollars), Table S2001



*Due to smaller sample size, the margin of error is greater for the American Indian and Alaska Native income estimates.

Notes: All race categories are single race. All other races, except for White (non-Hispanic), do not distinguish between Hispanic and non-Hispanic ethnicity. Hispanic/Latino may be of any race. Family income includes all forms of income received on a regular basis, such as wages, social security, public assistance, etc.

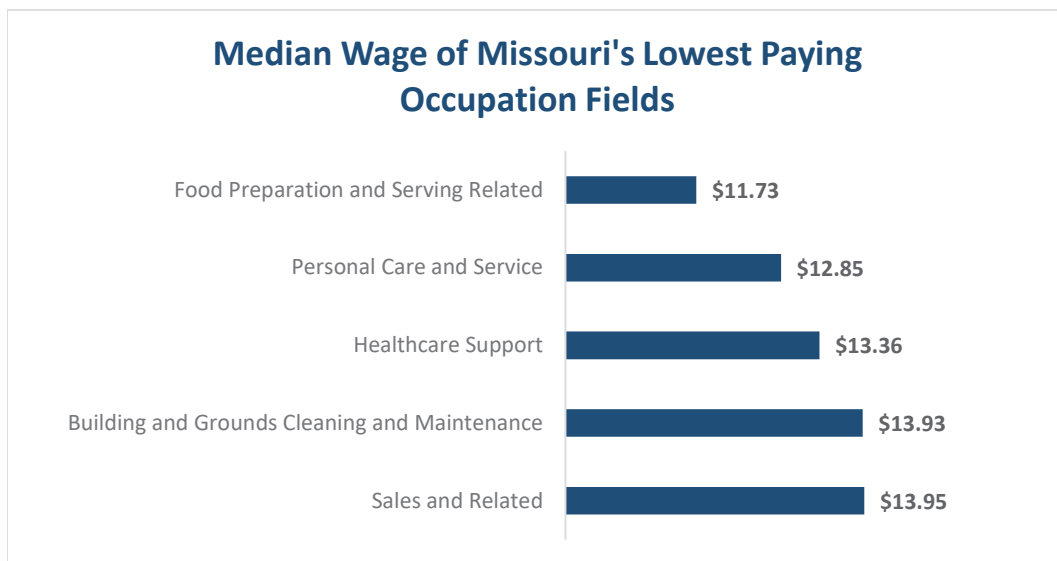
Source: MBP analysis of data from U.S. Census Bureau, 2016-2020 American Community Survey 5-Year Estimates, Family Income In the Past 12 Months (In 2020 Inflation-Adjusted Dollars), Tables B19101B-D and B19101H-I.

Low Wages Often Go Hand in Hand With Lack of Other Measures of Job Stability

Workers earning low wages are far more likely to have unstable jobs with unpredictable schedules and involuntary part-time work, compared to higher wage earners.^{xi} Low paying jobs also tend to offer fewer benefits (e.g., healthcare insurance, paid leave, etc.).^{xii}

This lack of financial and economic stability makes it difficult for low wage workers to weather economic downturns and save for unexpected emergencies. Notably, most of Missouri's lowest paid workers work in industries that experienced the greatest job loss during the pandemic.

Moreover, food service workers, childcare workers, and home health aides – critical workers who were deemed essential during the pandemic – all have median wages below \$12 per hour.^{xiii}



Source: Missouri Economic Research and Information Center (MERIC) Occupational Employment and Wage Data for Missouri (2021)



“Raising the minimum wage would be life-changing. It would help me tremendously. I wouldn't have to rely on government assistance to take care of me and my kids. I would be able to get my own place, as well as have a dependable working car. I'd be able to give my kids the lifestyle they deserve.”

Nicole Rush, Restaurant Employee

A SPOTLIGHT ON CARE WORKERS

Care workers represent one of the fastest growing occupations in Missouri and play a fundamental role in families' lives and in the economy. Yet they are among the lowest paid workers in our state and often have few benefits beyond their pay.



Changing Demographics Will Increase Shortage of Care Workers in Missouri

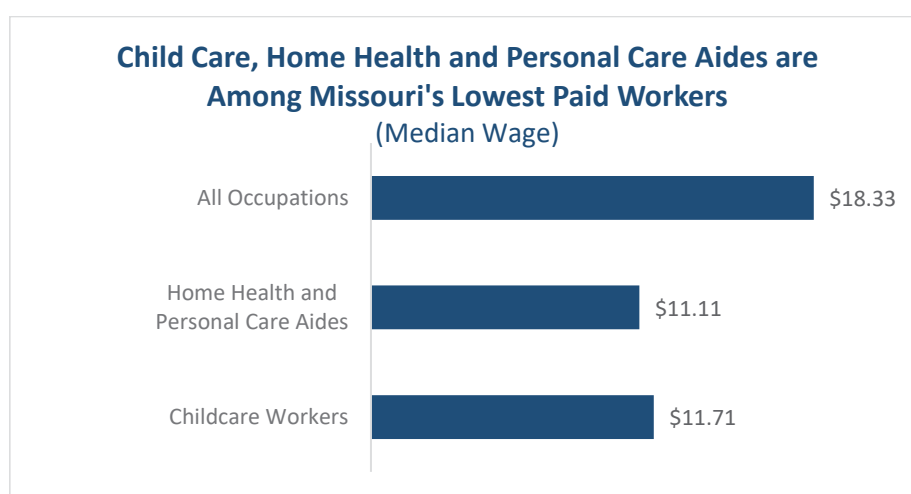
Care workers play a fundamental role in families' lives and in the economy, allowing Missourians to participate in the workforce while knowing that their loved ones are safe and cared for in home, childcare, or other settings. Unfortunately, like most of the country, Missouri is facing a significant shortage in the elder care workforce as the baby boom population retires. Compounding the problem for working parents is the shortage of childcare workers, leaving many in the 'sandwich generation' facing difficult caregiving choices for both their parents and their children.

Childcare Workers and Home Health and Personal Care Aides are already among the state's top 20 occupations with the most job openings, including total annual openings of 3,560 Childcare Workers and 12,432 Home Health and Personal Care Aides,^{xiv} and this demand is expected to increase over the decade.^{xv}

Low wages and few benefits may make it hard for these fields to attract more workers. Care work is often mentally and physically demanding work, requiring multiple skills, and high levels of trust and professionalism. The low pay of this undervalued work often leads to high turnover and staffing shortages, which can compromise the care and service children and adults receive.^{xvi,xvii}

Care Workers Among the Lowest Paid Workers & Disproportionately Female, Black, and Hispanic

Missouri has more than 11,300 Childcare Workers, and almost 71,000 Home Health and Personal Care Aides who provide care to the elderly and individuals with disabilities.^{xviii} These essential workers have median annual wages of \$24,360 and \$23,110, respectively—barely above the \$23,030 poverty threshold for a family of three.^{xix} Adding to their financial insecurity, care workers are also less likely to receive nonwage benefits, such as health insurance and retirement benefits, compared to the overall workforce.^{xx} And like other low-paid workers, they are less likely to have access to paid leave compared to higher wage earners.^{xxi}



Source: Missouri Economic Research and Information Center (MERIC) Occupational Employment and Wage Data for Missouri (2021)

Though statewide demographic data is limited, nationally childcare and home health workers are disproportionately female, Black, and Hispanic, compared to the overall workforce.

- While almost half of all workers are women, nearly 90% of home healthcare workers and 94% of childcare workers are women.^{xxii}
- About 1 of every 4 home healthcare workers are Black women, and 1 in every 5 are Hispanic women. But among all workers, Black and Hispanic women are each less than 1 in every 13 workers.^{xxiii}
- Among childcare workers, the rates of Black and Hispanic women are more than twice their rates among all workers.^{xxiv}

Not only have the efforts of these members of the workforce historically been undervalued, but they continue to be discriminated against in the job market and often encounter multiple barriers and fewer job opportunities.^{xxv,xxvi} All are factors that leave them vulnerable to jobs that lack worker protections and adequate compensation.

Childcare and Home Health and Personal Care Aide occupations were impacted during the COVID-19 pandemic. Home Health and Personal Care Aide employment has returned to near 2019 pre-pandemic levels, but the state had about 2,000 fewer childcare workers in 2021 compared to 2019.^{xxvii} This has broader implications for the state's economy because parents' access to childcare is correlated with increased labor force participation and ability to earn a living, particularly for mothers.^{xxviii,xxix}

"In the profession of early education or childcare, wages for employees are so low that most of the employees find themselves in the same emotional and mental state as the struggling families we serve. Overworked, underpaid, and invisible to the officials that say they support us, Childcare facility employees work paycheck to paycheck and still need public assistance or have to choose to pay a bill or put food on the table for their own families, all while making sure the children in their classroom get everything they need with a smile on the teachers' faces. It's sometimes hard to make sure your classroom kids get fed while you secretly wonder if your own children will eat that night."



Samantha Cross, Director, Little Precious Angels Childcare Center



Ms. Elinor Simmons, Healthcare Worker, SEIU Healthcare Missouri

"Home health workers have been undervalued and denied the wages, benefits, and respect that we deserve for too long. Through this pandemic, we stepped up to deliver unmatched care to vulnerable Missourians in the comfort of their own homes. We work long hours, take on physical and emotional labor, and provide the one-on-one care and attention that keeps our clients healthy and safe. We're asked to take on more and more, working longer hours without proper support or a living wage. It's beyond time our leaders step up and stop neglecting essential workers and the Missourians we care for."

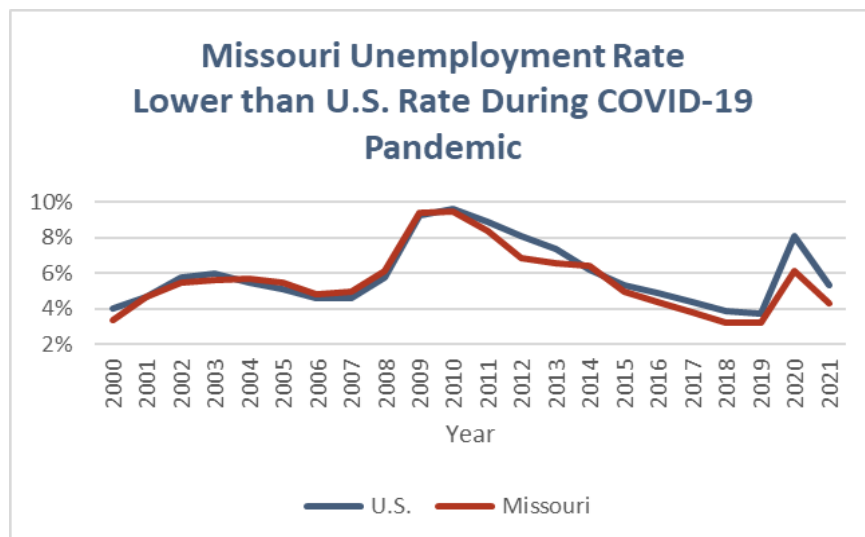
JOBS & UNEMPLOYMENT

Before the pandemic, Missouri's overall unemployment rate was lower than it had been in two decades, and the labor market is now especially tight, with unemployment declining to 2.4 percent in September 2022. However, the unemployment rate masks considerable disparities, and not all occupations and industries have recovered equally. Overall, Missouri has 21,000 fewer jobs today than it did prior to the pandemic.

Missouri's Unemployment Rate

Like the rest of the country, Missouri's unemployment rate spiked during the COVID-19 pandemic. While the state's pre-pandemic 2019 annual unemployment rate was 3.2%,^{xxx} at the height of the pandemic in April 2020, 1 in every 9 Missouri workers (or 11.2%) were unemployed.^{xxxi}

Following this spike, fewer Missourians filed for unemployment insurance (UI) benefits in state fiscal year 2021 compared to 2020.^{xxxii} As of September 2022, Missouri's unemployment rate is down to 2.4%.^{xxxiii}

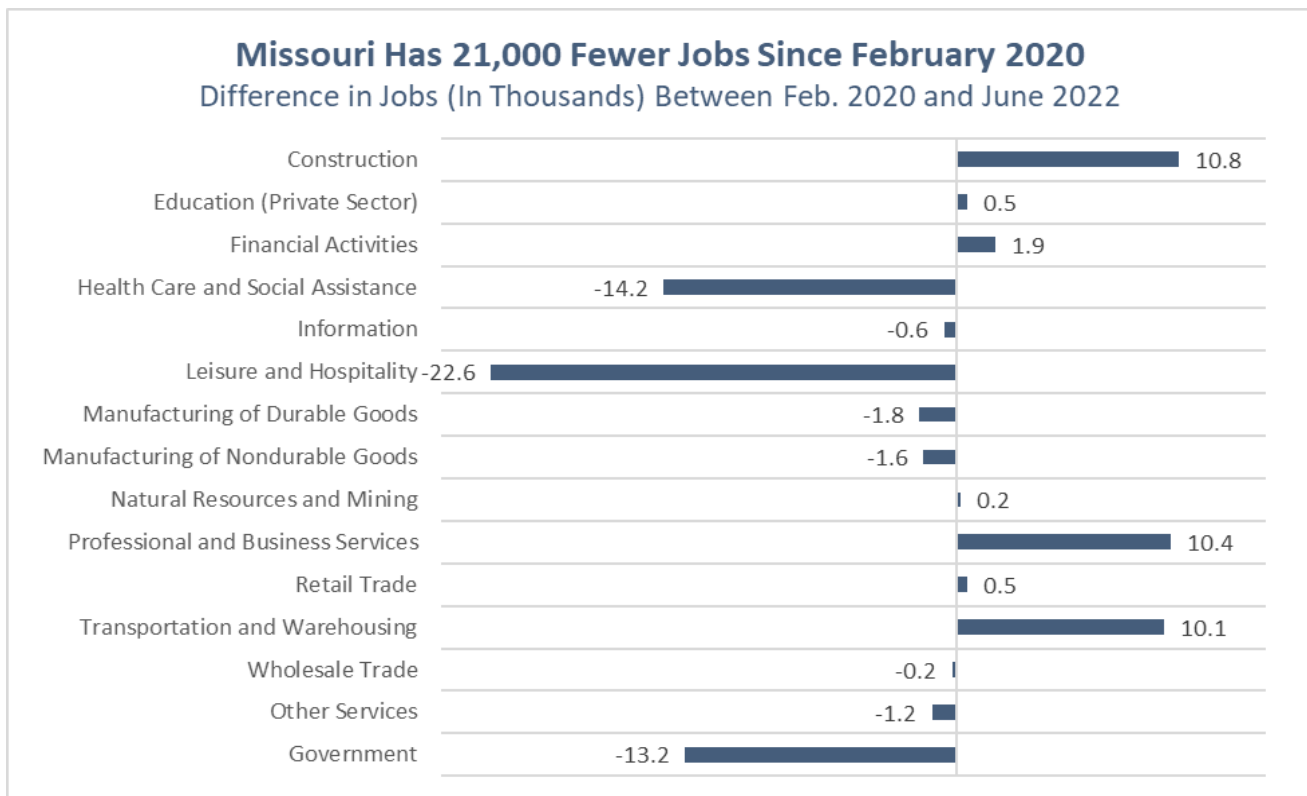


Source: Economic Policy Institute analysis of Current Population Survey microdata from the U.S. Census Bureau

Unemployment Numbers Do Not Provide Full Picture of Missouri’s Labor Market

However, many workers who are counted as employed are actually underemployed. These individuals are working part-time, but would prefer full-time employment. In addition, the official unemployment rate does not include discouraged job-seekers who would prefer to work but stopped actively seeking employment because they could not find a job, or face some barrier to employment, such as lack of childcare or caring for a sick or older family member.^{xxxiv} For the quarter ending June 2022, Missouri’s average unemployment rate with underutilized workers is 3.65%—almost 22,000 more workers than are included in the official unemployment rate for the same period.^{xxxv}

Moreover, some jobs lost during the pandemic have yet to return. Between February and April 2020, Missouri employers slashed nonfarm payrolls by nearly 360,000 jobs.^{xxxvi} Of those jobs, 4 of every 10 were in the Leisure and Hospitality industry. As of June 2022, about 21,000 nonfarm jobs have not returned, a majority of which are in Leisure and Hospitality, Health Care and Social Assistance, and Government.^{xxxvii}



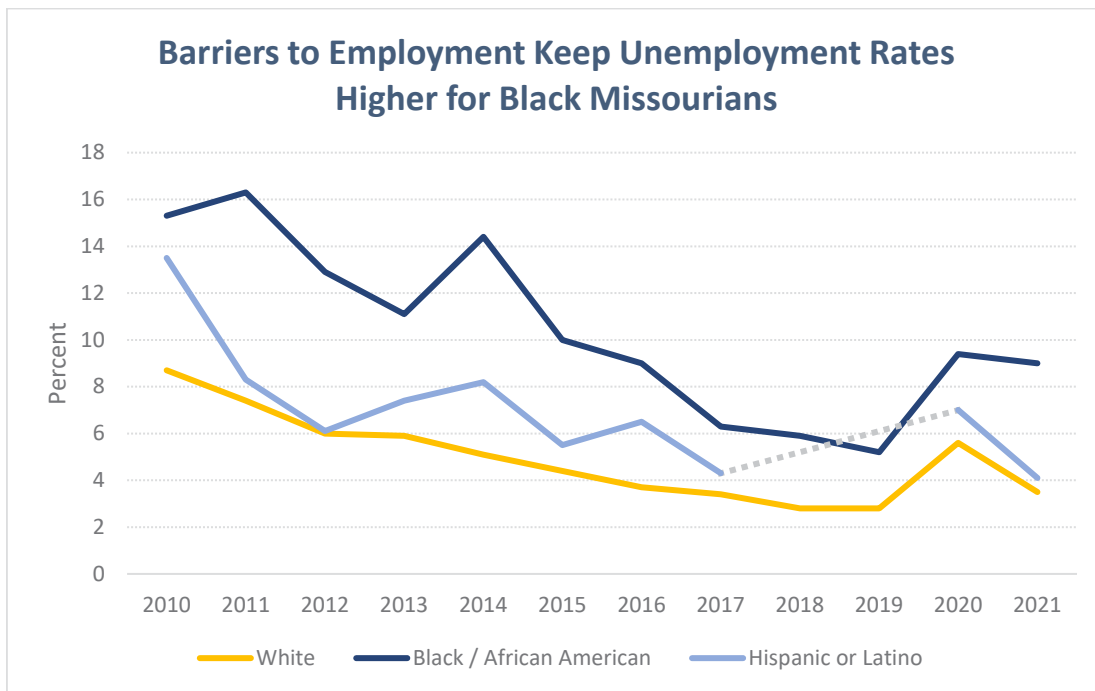
Note: Nonfarm payroll employment numbers, seasonally adjusted.

Source: Missouri Economic Research and Information Center (MERIC) in cooperation with U.S. Department of Labor, Bureau of Labor Statistics

While Missouri’s long-term unemployment rate (workers unemployed for 27 weeks or longer) declined slightly from 2019 to 2020 (from 15.7% to 14.5% of total unemployed), the rate more than doubled to 33.2% of all unemployed in 2021. In other words, one of every three unemployed workers in 2021 had been unemployed for 27 weeks or more —the highest rate since 2013.^{xxxviii}

The Economic Recovery Has Been Uneven

Although the job market has improved since the pandemic started, the economic recovery has been slower for some workers compared to others. In Missouri, Black workers are more than twice as likely to be unemployed compared to White workers, even though they participate in the labor market at nearly the same rate.^{xxxix} This two to one Black-white unemployment ratio is consistent with nationwide unemployment data, and it has been documented since the first recorded year of the Bureau of Labor Statistics in 1954. Research finds that occupational segregation and anti-Black discrimination persists in the labor market at nearly all education and skill levels, which may explain some of the disparity.^{xl}



Note: Due to smaller sample size, Hispanic or Latino estimates may be less reliable than for other groups. Hispanic or Latino estimates for 2018 and 2019 are unavailable.

Source: U.S Bureau of Labor Statistics, Local Area Unemployment Statistics, Expanded State Employment Status Demographic Data.



Photo courtesy of the *Labor Tribune*

"Unemployment insurance is a lifeline for workers who hit hard times, whether it's work drying up in the off-season or a global pandemic. When the weather can affect your weekly or monthly income as it does for our state's construction workers, unemployment benefits help folks stay afloat and cover groceries and bills."

Travis Barnes, Ironworkers Local 396

CONCLUSION

Missourians work hard for their families and communities and have shown that when we unite to improve our state's economic policies, we all benefit.

Together, we can advance proven economic strategies that invest in our workers and build prosperity and opportunity for everyone. For example, by increasing the minimum wage, expanding paid leave, and investing in affordable childcare and other caregiving services that families need to work, we can improve the lives of Missouri workers and their families, strengthen our communities, and make it so that Missourians can indeed get ahead.

Opportunity for everyone is possible. Together, we can reimagine the American dream.

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- vii. IBID
- viii. Data is from survey periods ending July 5, 2021 and July 11, 2022. Source: U.S. Census Bureau, Household Pulse Survey Interactive Tool.

ix. Public employees, agriculture workers, some workers with disabilities, and employees of retail and service businesses with gross sales less than \$500,000 can be paid less than \$11.15 per hour. The minimum wage for tipped employees is half the minimum wage, \$5.575 per hour, plus any amount necessary to bring the employee's total compensation to \$11.15 per hour (i.e., employee tips can be used to make up the difference).

x. For a family with two adults and two children, each full-time working adult would need to earn at least \$22.43 per hour. Source: Massachusetts Institute of Technology, Living Wage Calculation for Missouri. Retrieved 8/3/22 from <https://livingwage.mit.edu/states/29>.

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xix. Missouri Economic Research and Information Center (MERIC), Occupational Employment and Wage Data for Missouri (2021), and U.S. Department of Health and Human Services, Assistant Secretary for Planning and Evaluation, 2022 Poverty Guidelines for the 48 Contiguous States and the District Of Columbia."

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- xxxii. In state fiscal year (SFY) 2021, 522,656 individuals filed a claim compared to 828,289 individuals in SFY 2020. Source: Missouri Department of Labor Annual Reports 2021 and 2020. Retrieved from <https://labor.mo.gov/data>
- xxxiii. U.S. Bureau of Labor Statistics Local Area Unemployment Statistics for Missouri. <https://data.bls.gov/timeseries/LASST2900000000000003>
- xxxiv. Workers who are marginally attached to the labor force are defined as individuals who have searched for work at least once in the past 12 months, but not in the past four weeks, who want a job and are available to work. This includes discouraged workers who may believe no jobs are available,

they do not have the right skills, employers have an age bias, etc. Other examples of marginally attached workers are those with an illness, have transportation issues, are going to school or training, or have family responsibilities. Source: U.S. Census Bureau, Current Population Survey Design and Methodology Technical Paper 77, October 2019. <https://www2.census.gov/programs-surveys/cps/methodology/CPS-Tech-Paper-77.pdf>

xxxv. An estimated average of 21,800 workers were marginally attached to the labor force in the second quarter of 2022. Sources: MBP analysis of data from U.S. Bureau of Labor Statistics Local Area Unemployment Statistics for Missouri, data retrieved July 28, 2022, from <https://data.bls.gov/timeseries/LASST2900000000000003>; and U.S. Bureau of Labor Statistics, All Marginally Attached Workers for Missouri [ALLMARGATMO], retrieved September 1, 2022 from FRED, Federal Reserve Bank of St. Louis; <https://fred.stlouisfed.org/series/ALLMARGATMO>.

xxxvi. Economic Policy Institute analysis of data from Bureau of Labor Statistics Current Employment Statistics

xxxvii. Missouri Economic Research and Information Center (MERIC) in cooperation with U.S. Department of Labor, Bureau of Labor Statistics. Retrieved from <https://meric.mo.gov/data/industry/current-employment-statistics>

xxxviii. Economic Policy Institute analysis of Current Population Survey microdata from the U.S. Census Bureau

xxxix. In 2021, the labor force participation rate (LFPR) for Black and White Missourians was 61 and 60.5 percent, respectively. LFPR is the percent of the noninstitutionalized population (age 16 or older) that is either working or looking for work. Source: Economic Policy Institute analysis of Current Population Survey microdata from the U.S. Census Bureau.

xl. L. Quillian, D. Pager, O. Hexel, and A. H. Midtbøen (September 12, 2017), “Meta-Analysis of Field Experiments Shows No Change In Racial Discrimination In Hiring Over Time,” Proceedings of the National Academy of Sciences of the United States of America (PNAS), retrieved from <https://www.pnas.org/doi/full/10.1073/pnas.1706255114#sec-2> ; Valerie Wilson (January 20, 2022), “The Costs of Racial and Ethnic Labor Market Discrimination and Solutions That Can Contribute To Closing Employment And Wage Gaps: Testimony before the U.S. House of Representatives Select Committee on Economic Disparity and Fairness in Growth,” Economic Policy Institute, retrieved from <https://www.epi.org/publication/wilson-testimony-costs-of-racial-and-ethnic-labor-market-discrimination/> ; K. Bahn and C. Sanchez Cumming (July 1, 2020), “Factsheet: U.S. Occupational Segregation By Race, Ethnicity, and Gender,” Washington Center for Equitable Growth, retrieved from <https://equitablegrowth.org/factsheet-u-s-occupational-segregation-by-race-ethnicity-and-gender/>; U.S. Department of Labor (March 15, 2022), “Bearing the Cost: How Overrepresentation in Undervalued Jobs Disadvantaged Women During the Pandemic,” retrieved from <https://www.dol.gov/sites/dolgov/files/WB/media/BearingTheCostReport.pdf>