



ENHANCED LABOR MARKET ANALYSIS

Quarterly Demand Update

September 2026

INTRODUCTION

The full Enhanced Labor Market Analysis (ELMA) surfaced a fundamental question: If employers are looking for workers and thousands of low- and moderate-income (LMI) residents are looking for a pathway to a better economic future, why aren't they connecting? ELMA calls this disconnect the Labor Market Friction Gap.

This ELMA Quarterly Demand Data Update takes on that gap directly by focusing on Opportunity Occupations, aiming to surface the real, actionable insights employers and workforce partners need to help close it.

The gap becomes particularly important when we look beyond the traditional assumption that economic mobility requires a four-year degree. Across the St. Louis economy, employers need workers in occupations that pay a living wage and can be accessed without a bachelor's degree. Many of these Opportunity Occupations can be reached through targeted skills development, industry-recognized credentials, certificates, apprenticeships, and other shorter-term education and training pathways.

Yet for many low- to moderate-income residents, these opportunities are effectively invisible.

That is the insight at the heart of ELMA. A job can exist, be in demand, pay a living wage, and offer a pathway to economic mobility and still be functionally unavailable to someone who does not know the occupation exists, understand how to qualify for it, or have access to the pathway that leads to it.

This is why ELMA brings together demand and supply intelligence: specific occupations employers need, what they pay, what education and skills they require, and where those opportunities intersect with the characteristics, barriers, and geography of LMI residents.

What to Expect from this Report

The quarterly demand report focuses on the demand side of the St. Louis labor market. The quarterly demand report looks backwards over two years (eight quarters) to understand how demand has shifted for in-demand Opportunity Occupations. The analysis looks at shifts between the most recent eight quarters from July 2024 to June 2026.

WHAT IS AN OPPORTUNITY OCCUPATION?

The focus of the Quarterly ELMA report is occupations that require less than a Bachelor's degree and are in high demand within the St. Louis region. These non-bachelor, high demand occupations are also known as Opportunity Occupations. Opportunity Occupations was a concept developed by the Federal Reserve Banks of Cleveland, Philadelphia, and Atlanta to examine opportunity-rich employment for those without a bachelor's degree.

These high-demand occupations enable low- and moderate-income individuals to enter and advance to living-wage careers without requiring a traditional four-year bachelor's degree. Opportunity Occupations typically offer accessible pathways into employment through employer-recognized credentials, apprenticeships, certificates, or on-the-job training. They also provide opportunities for wage progression and are expected to experience sustained demand over time.

Opportunity Occupation data tracks the top fifteen occupations in the St. Louis region based on the number of job postings each quarter. The analysis covers eight quarters, from Q3 2024 through Q2 2026. During this two-year period, nineteen different occupations appeared in the top fifteen. Registered Nurses consistently ranked first across all eight quarters.

THE REGION'S JOB LANDSCAPE

OPPORTUNITY OCCUPATIONS IN THE ST. LOUIS MSA

Top 15 Opportunity Occupations by Job Postings in St. Louis MSA (Q2 2026)

This table summarizes the region's top 15 Opportunity Occupations by average monthly job postings during the Q2 of 2026. It also highlights hiring trends, median annual earnings, and typical entry-level education requirements for each occupation.

Occupation	Avg Monthly Postings	Monthly Job Posting Trend	Median Annual Earnings	Entry Level Education
Registered Nurses	2,104		\$87,418	Associate Degree
Truck Drivers	1,020		\$59,407	Postsecondary Certificate
Maintenance Workers	407		\$53,643	HS Diploma or Equivalent
Licensed Practical Nurses (LPNs)	355		\$65,846	Postsecondary Certificate
Wholesale & Manufacturing Sales Reps	334		\$67,722	HS Diploma or Equivalent
Food Service Managers	296		\$58,437	HS Diploma or Equivalent
Service Sales Representatives	286		\$62,760	HS Diploma or Equivalent
Office Supervisors	273		\$68,694	HS Diploma or Equivalent
Radiology Technologists	225		\$73,199	Associate Degree
Automotive Service Techs and Mechanics	218		\$53,517	Postsecondary Certificate
Bookkeepers	157		\$50,557	Some College
Maintenance Supervisors	142		\$81,209	HS Diploma or Equivalent
Respiratory Therapists	135		\$76,470	Associate Degree
Production Planning Clerks	129		\$53,490	HS Diploma or Equivalent
IT Support Specialists	125		\$61,261	Some College

Source: Lightcast

TOP OPPORTUNITY OCCUPATIONS OVER TIME

The previous chart highlights the top fifteen opportunity occupations at the end of Q2 2026, with Registered Nurses, Truck Drivers, and Maintenance Workers among the region's most in-demand occupations. However, job demand is not steady and shifts and changes with each quarter.

The following chart tracks how the top fifteen opportunity occupations shifted from Q3 2024 through Q2 2026. Some occupations remained consistently among the most in-demand, while others rose, fell, or moved in and out of the top fifteen altogether. These changes illustrate the dynamic nature of employer demand across the St. Louis region and help distinguish occupations with sustained demand from those experiencing shorter-term fluctuations.

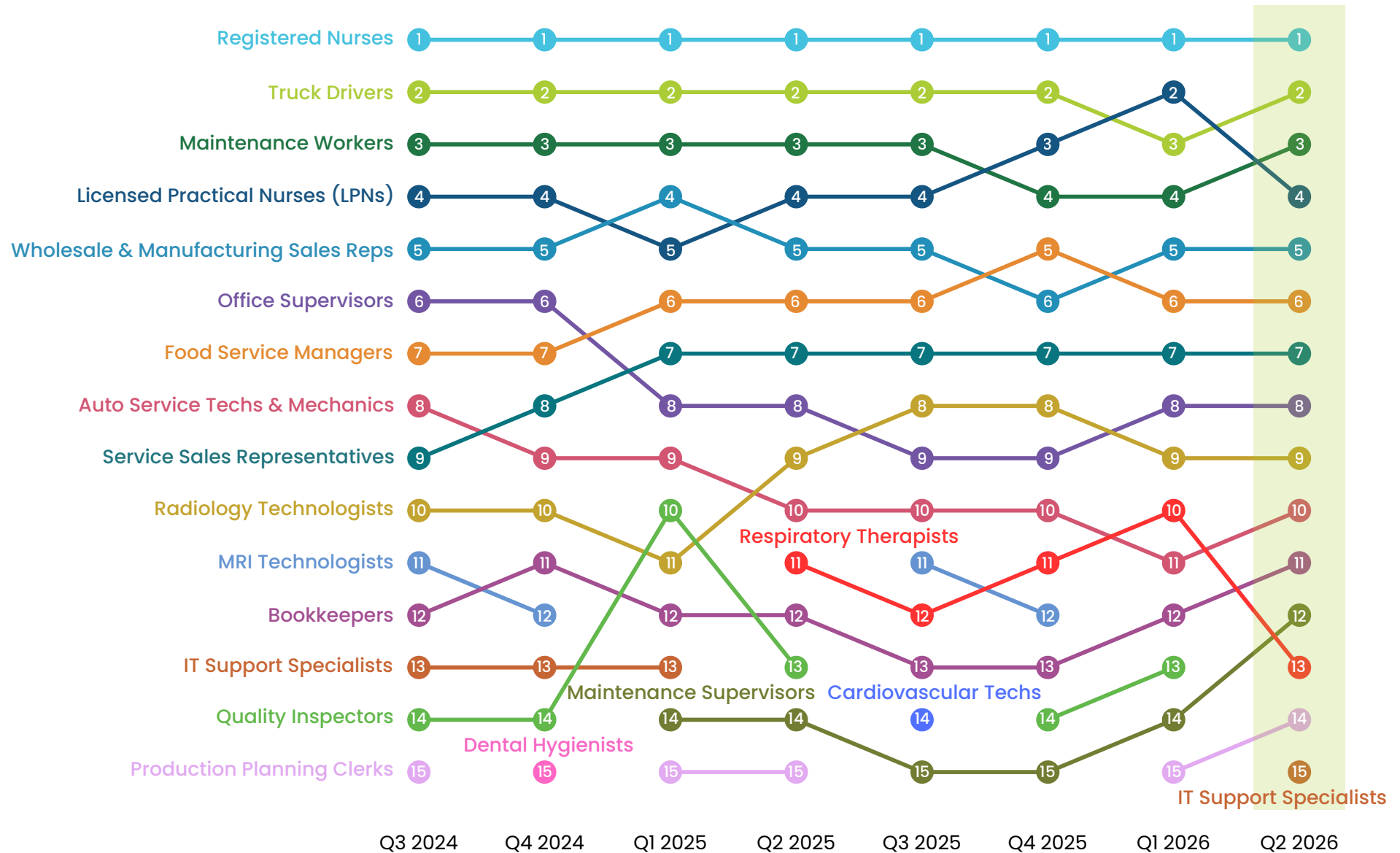
How to Read The Following Chart

Each dot represents an occupation's rank based on job posting demand for that quarter, with #1 representing the highest demand. Follow an occupation's line from left to right to see how its rank changes over time. A line begins when an occupation enters the top fifteen and ends when it falls out of the top fifteen. Gaps therefore indicate quarters when an occupation was not among the region's fifteen most in-demand opportunity occupations.

THE REGION'S JOB LANDSCAPE

OPPORTUNITY OCCUPATIONS IN THE ST. LOUIS MSA

Top 15 Opportunity Occupations by Quarter in St. Louis MSA (July 2024–June 2026)



Source: Lightcast

THE REGION’S JOB LANDSCAPE

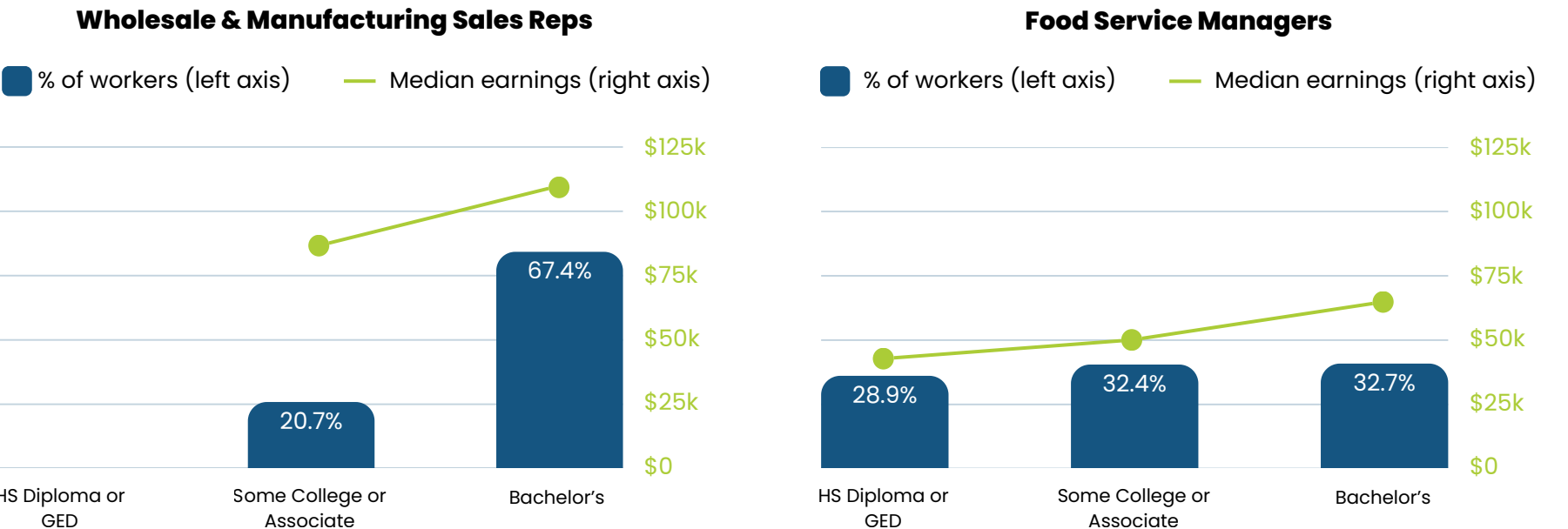
EDUCATION, EARNINGS, AND CAREER PATHWAYS

While Opportunity Occupations have entry level education requirements below a Bachelor’s degree, it does not mean that every worker has the same education level. Some workers have different education levels and different earnings based on their education. The two occupations below illustrate how education and earnings can vary within an Opportunity Occupation.

Wholesale and Manufacturing Sales Representatives have a high school diploma as their typical entry-level education, but in practice only about 12% of St. Louis workers in the role have just that credential. 67.4% hold a bachelor’s degree and 20.7% have some college or an associate degree. Earnings rise sharply at each step. The formal barrier to entry is low; the effective barrier is not. We can see that there is a clear path for upward earnings for those who have some college to those who have a bachelor’s degree.

Food Service Managers show a different pattern. Employment is spread fairly evenly across education levels, closer to what the entry-level requirement would predict. Earnings still rise with education, though, with bachelor’s degree holders earning nearly \$70,000 annually versus lower amounts for the other two groups.

These Opportunity Occupations show earnings progression can occur even within an occupation, sometimes tied to a rising credential bar and sometimes not.



Sources: (a) U.S. Census Bureau, American Community Survey (ACS) Public Use Microdata Sample (PUMS), 2020–2024 5-year Estimates. (b) Lightcast

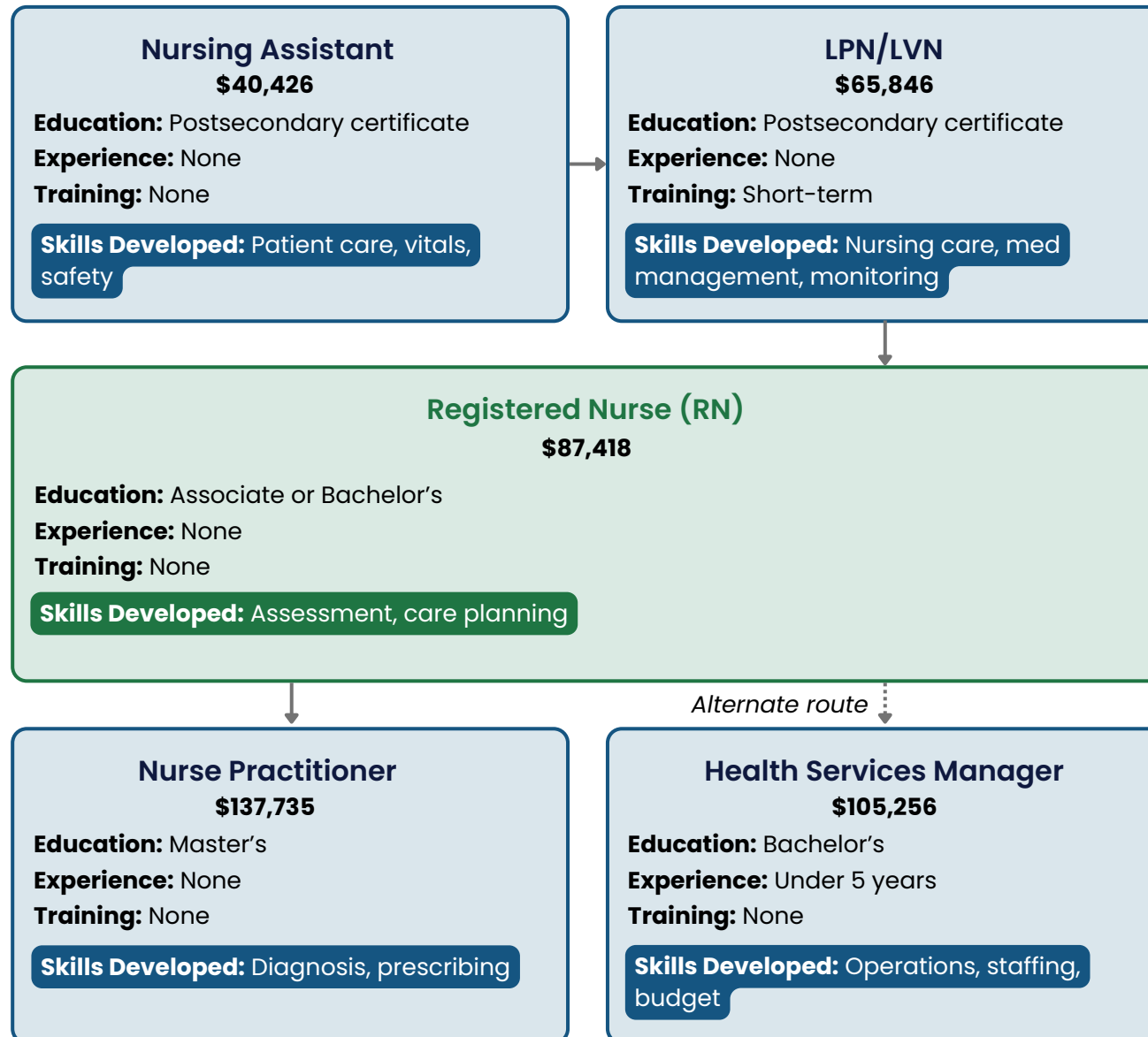
OPPORTUNITY OCCUPATION CAREER PATHWAYS

Opportunity Occupation Career Pathways illustrate how workers can progress from entry-level roles to higher-skill, higher-wage positions through targeted training, credentialing, and on-the-job experience. These pathways show how foundational roles build essential skills that support upward mobility. By mapping wages, education requirements, and competencies at each stage, this section demonstrates how individuals can move toward family-sustaining careers while enabling employers to develop stronger, more sustainable talent pipelines.

The pathways presented here focus on the top three in-demand Opportunity Occupations at the end of Q2 2026. Each pathway represents a potential career progression, illustrating both roles that can lead into a quality occupation and roles that individuals may advance to from it. These examples are illustrative rather than prescriptive; they reflect common trajectories, not the only route into or beyond a given occupation.

OPPORTUNITY OCCUPATION CAREER PATHWAYS

Registered Nurse



Summary

A **nursing assistant certificate** (\$40,426) is one entry point into a much larger pathway. With additional training, workers can move to **LPN/LVN** (\$65,846), then to **registered nurse** (\$87,418) with an associate or bachelor's degree, and on to **nurse practitioner** (\$137,735) with a master's degree. Registered nurses can also branch into **health services management** (\$105,256), which draws on the same clinical background but shifts toward operations and staffing.

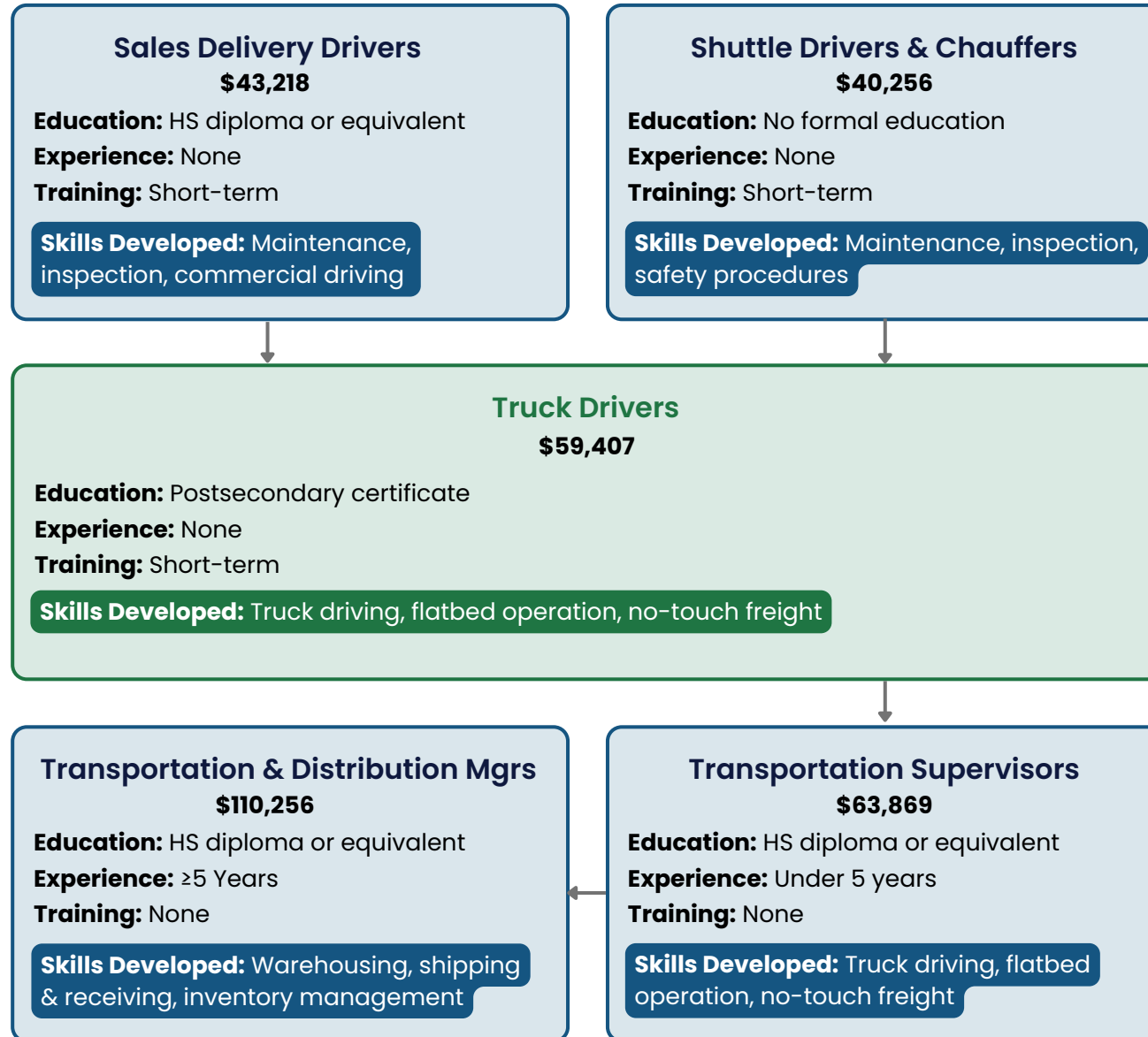
Top Employers

- SSM Health Care
- BJC HealthCare
- Mercy

Sources: (a) Federal Reserve Bank of Philadelphia. Occupational Mobility Explorer. (b) Lightcast.

OPPORTUNITY OCCUPATION CAREER PATHWAYS

Truck Drivers



Summary

A **sales delivery driver** role (\$43,218) or **shuttle driver & chauffer** role (\$40,256) are two entry points into a much larger pathway. With a postsecondary certificate, workers can move to **truck driver** (\$59,407), then to **transportation supervisor** (\$63,869) with a few years of experience, and on to **transportation and distribution manager** (\$110,256), which pays nearly triple the entry-level wage. Employers like Walmart, Dollar General, and Boeing are among the region's largest and most frequent job posters, regularly hire across this entire pathway.

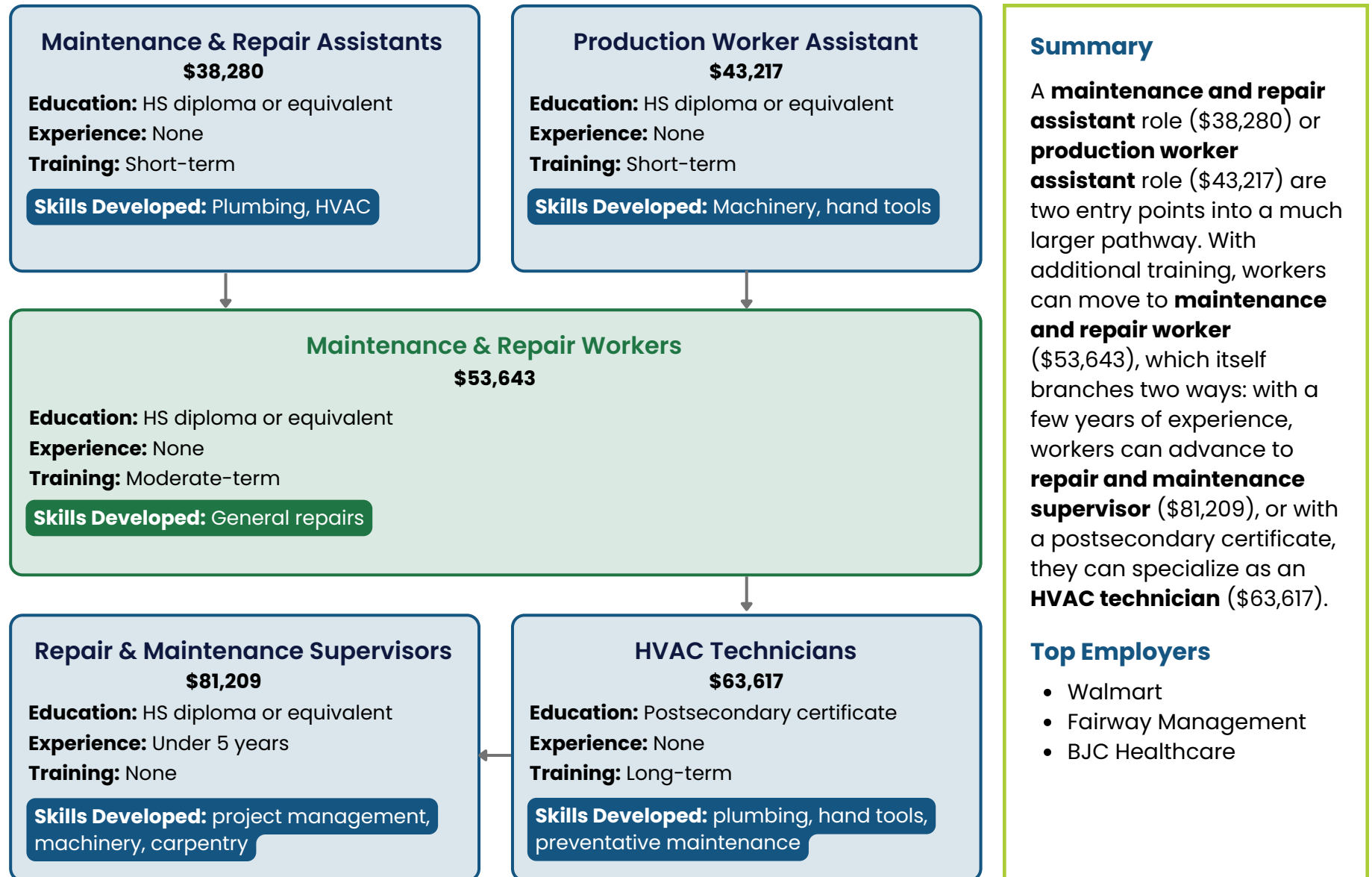
Top Employers

- Roehl Transport
- I-65 Transport
- Hogan

THE REGION'S JOB LANDSCAPE

OPPORTUNITY OCCUPATION CAREER PATHWAYS

Maintenance & Repair Workers



Sources: (a) Federal Reserve Bank of Philadelphia. Occupational Mobility Explorer. (b) Lightcast.

THE REGION'S JOB LANDSCAPE

TOP POSTING EMPLOYERS IN THE ST. LOUIS MSA

Unique Job Postings by Company (April 2026–June 2026)

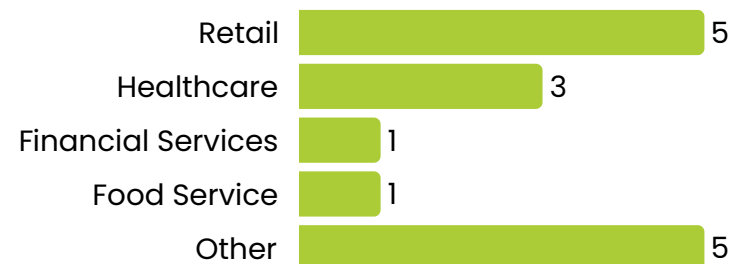
This page highlights the employers with the highest number of unique job postings between April and June 2026, along with the industries they represent. Together, they provide a snapshot of the organizations driving current hiring demand in the region.

In the second quarter of 2026, SSM Healthcare, BJC, and Mercy rank as the top three employers with the highest average monthly job postings, illustrating the sustained dominance of the Healthcare industry in the regional hiring landscape. Boeing ranks fourth with 518 average monthly job postings. Washington University follows with 325 average monthly job postings for the quarter.

Company	Postings	Avg. Monthly Postings
SSM Health Care	3,004	1,001
BJC HealthCare	2,929	976
Mercy	2,531	844
Boeing	1,553	518
Washington University in St Louis	976	325
Archdiocese Of St. Louis	744	248
Walmart	699	233
Dollar General	513	171
Allied Universal	490	163
Walgreens Boots Alliance	432	144
Domino's Pizza	394	131
Edward Jones	347	116
Schnuck Markets	326	109
Lowe's	324	108
Accenture	299	100

Source: Lightcast.

Top Employers by Industry



Key Takeaways

- **Healthcare remains the region's largest hiring sector by volume**, with three health systems representing the top employers.
- **Retail employers account for one-third of the top 15**, reflecting strong demand for frontline workers.
- **Top employers span a wide range of industries**, creating diverse employment opportunities.

CONCLUSION

The ELMA demand update makes one point unmistakably clear: the region does not lack opportunity. Employers continue to seek workers across a wide range of high-demand, living-wage occupations that do not require a bachelor's degree. Yet too many low- and moderate-income residents remain disconnected from these opportunities, not because they lack potential, but because the systems linking people to information, preparation, credentials, and employers remain fragmented. The challenge is to convert labor-market demand into accessible pathways to economic mobility.

ELMA provides the intelligence needed to identify where opportunity exists and which skills employers require. The next step is action: employers, training providers, workforce organizations, and community partners must use this evidence to align recruitment, training, supportive services, and hiring around the occupations offering the strongest prospects for advancement. By doing so, the region can move from labor-market friction to economic flow, meeting employer demand while enabling more residents to secure living-wage work, build durable careers, and share in regional prosperity.

GO DEEPER WITH ELMA

This quarterly snapshot is just one moment in a continuously updated picture. For the full data set, historical trends, and the latest occupational and industry demand figures behind this update, visit the ELMA labor market page at ippstl.org/labor-market. Whether you're shaping workforce programs, advising job seekers, or making a hiring decision, that's where the complete picture lives.

OUR PARTNERS

The Enhanced Labor Market Analysis (ELMA) was made possible through the collaboration of regional partners who contributed data, expertise, and insight. Their partnership strengthened the analysis and ensured it reflects the lived realities of the St. Louis workforce and economy.

