

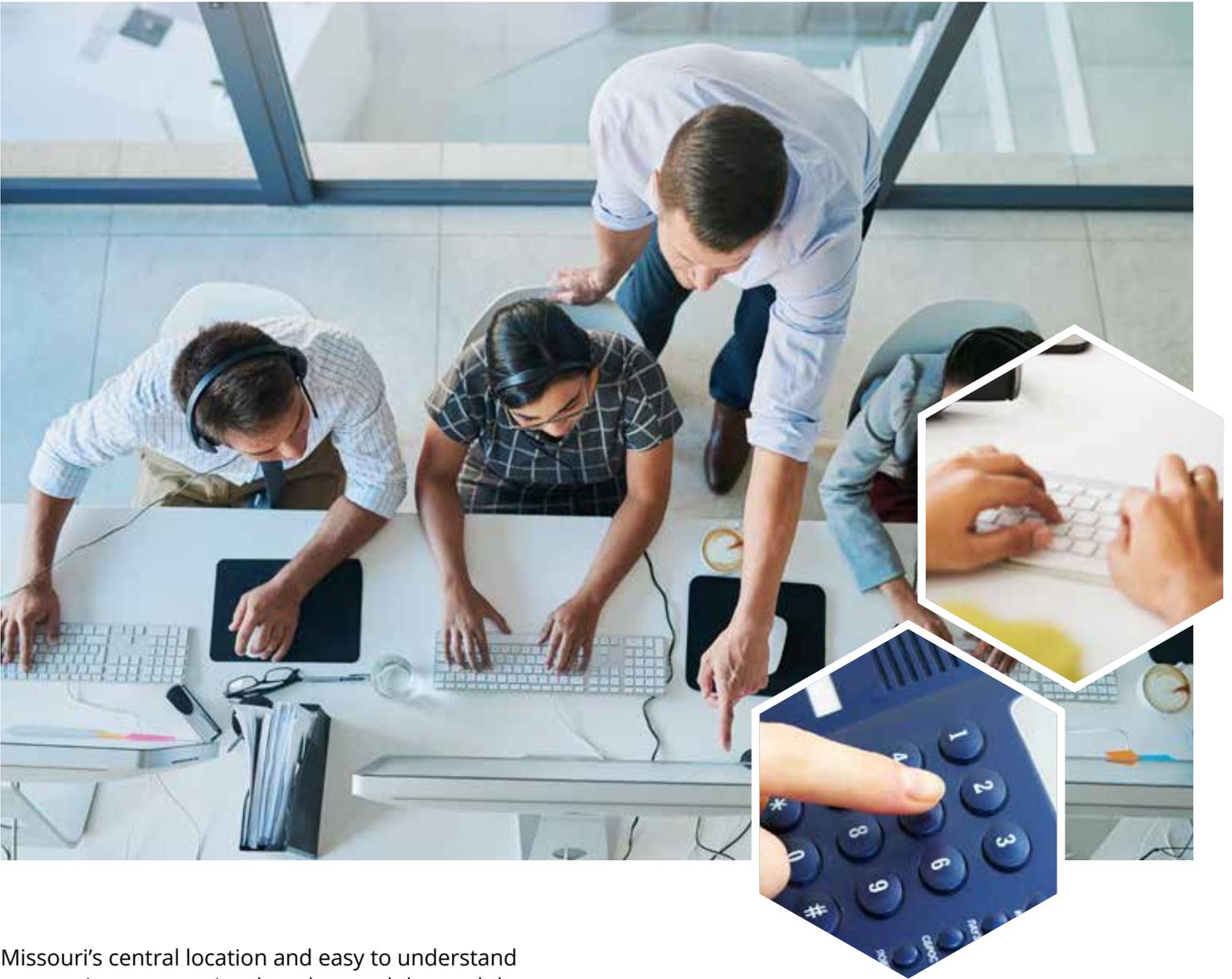


Call Centers in Missouri

MISSOURI
PARTNERSHIP®



Call Centers in Missouri

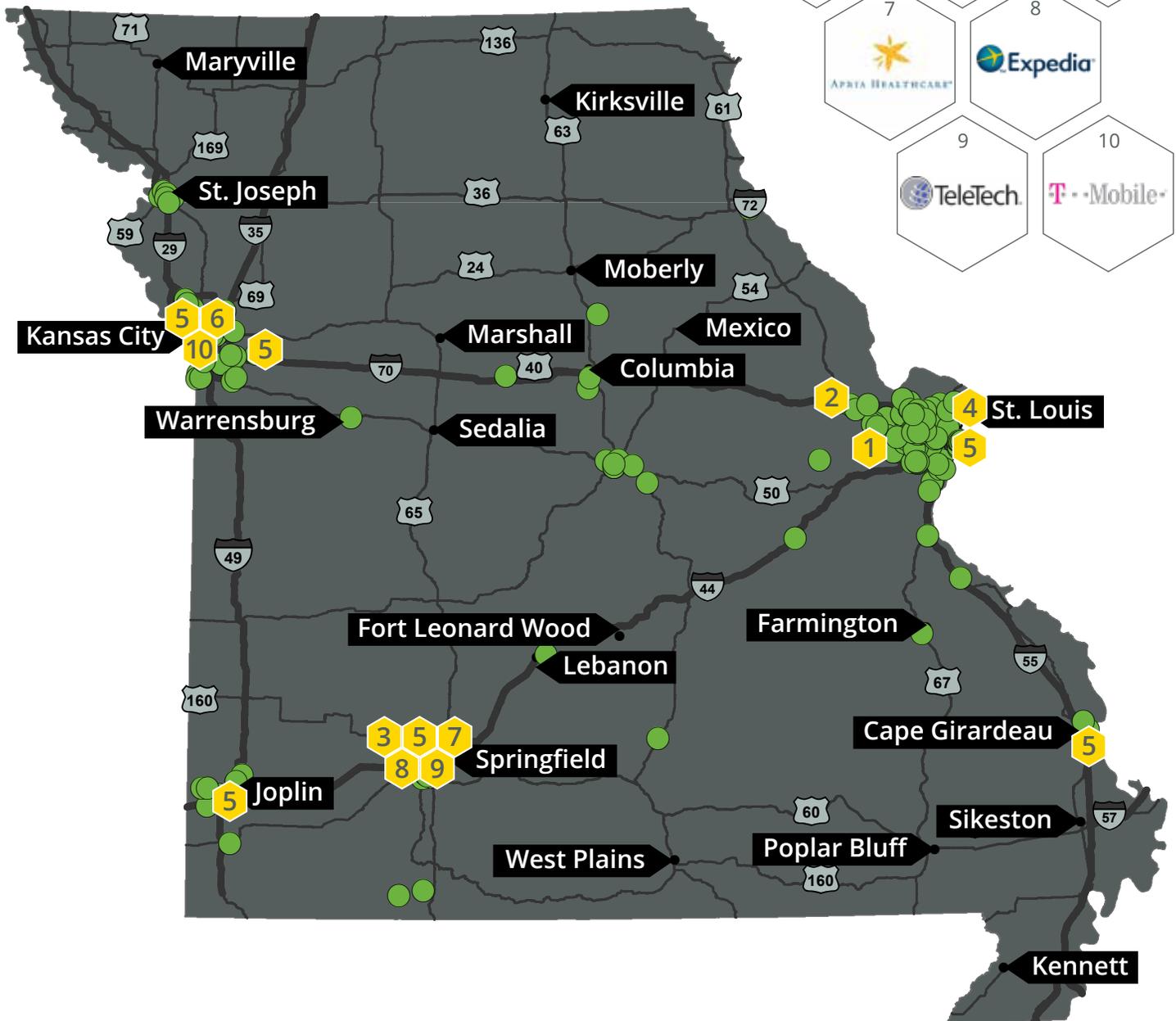


Missouri's central location and easy to understand accent gives companies the talent and the workday flexibility to provide call center support nationwide.

Call centers in Missouri are able to provide excellent customer service while simultaneously keeping costs low. With a diverse economy, large workforce and metro areas throughout the state, Missouri has the ability to support any business from back-office operations to traditional customer service centers. The state also boasts a number of micropolitan areas with lower saturation rates and competitive wages for call centers. When it comes to call centers, Missouri has a spot for just about everybody.

Missouri's Call Centers

- Missouri's top call centers by employment
- Call center



Top Call Center Employers in Missouri

Many industries seeing growth in call centers and back office operations are already big in Missouri including professional services, financial services and health innovation.





Recent Projects

AT&T (Various Locations), announced plans to hire 150 call center workers in Cape Girardeau and 100 in Springfield, Missouri in 2017. This is in addition to expanding with more than 50 retail sales jobs in company-owned stores across the St. Louis region, as well as additional hires in stores in Kansas City, Sikeston, Cape Girardeau and Rolla.

CenturyLink (Jefferson City), announced plans to add 40 jobs at its Jefferson City call center in 2017 as part of its plan to add 100 jobs at the office by the end of the year. CenturyLink currently employs 100 people at the call center.

Charter Communications (St. Louis), has announced numerous call center expansions over the past several years, adding more than 375 new jobs to the St. Louis region. Charter currently employs more than 4,000 people in Missouri and has seen that number grow more than 25 percent since May 2016.

Chase Card Services (Springfield), announced plans to expand its workforce in Springfield, Missouri. The company is planning to celebrate its 20th anniversary in Springfield by adding 300 new jobs that will focus largely on customer service for credit card owners.

EXL (Lee's Summit), announced the expansion of their new customer support center in Lee's Summit, Missouri. The new center is expected to house 250 employees by the end of the year, and will operate 24 hours a day, and seven days a week.

Expedia (Springfield), announced plans to add 35 new jobs at its Springfield, Missouri, call center in 2016. The company currently employs more than 900 people at its Springfield location.

Glass Lewis & Co. (Kansas City), announced plans to expand with a new operational service center in Kansas City. The expansion is expected to create 50 new jobs in the region.

IPacesetters (Carthage), announced plans to expand with a new call center near Carthage, Missouri, in 2017. The expansion is expected to bring nearly 200 new jobs to the region.

One Call Care Management (Springfield), selected the Springfield Region to expand its operations. The Jacksonville, FL-based company is utilizing an existing Springfield building and will create 100 new, full-time jobs by the end of 2017, with additional growth expected in the future.

Square (St. Louis), announced plans in 2018 to add more than 300 employees to its current 200+ in the Cortex Innovation Community. This latest expansion will increase Square's footprint to approximately 100,000 square feet and more than 600 employees.

TrialCard Inc (Kansas City), announced plans to open a contact center in Kansas City that will employ 225 people. The company was attracted to the Kansas City region thanks in part to the area's tech and startup environment, educated workforce and standard of living.

USA800 (Kansas City), announced plans to open a call center in North Kansas City, in 2016, and expected to hire more than 200 new employees.

Call Center Talent in Missouri

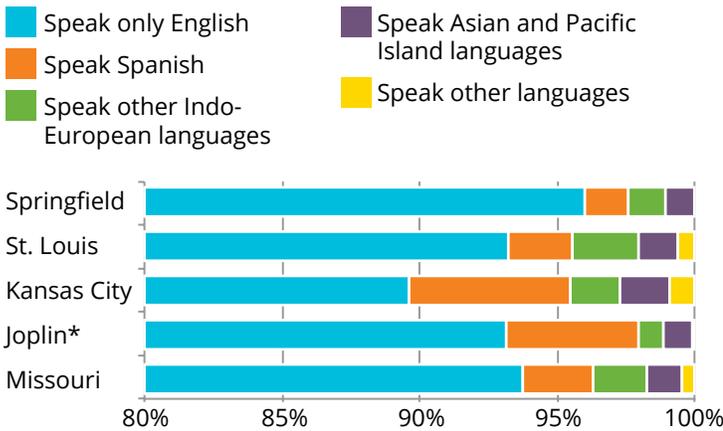
Missouri's abundance of talent along with its low cost of living and doing business, positions the Show-Me state as a prime location for call centers.

With more than three million workers, Missouri has a greater talent pool than 20 other states, including most of its neighbors. More than 20,000 workers in Missouri are employed in core occupations relevant to business services. Additionally, Missouri's well-educated population provides an easily trainable labor pool. Missouri's high school graduation rate is five percent higher than the U.S. average.

Language Spoken at Home

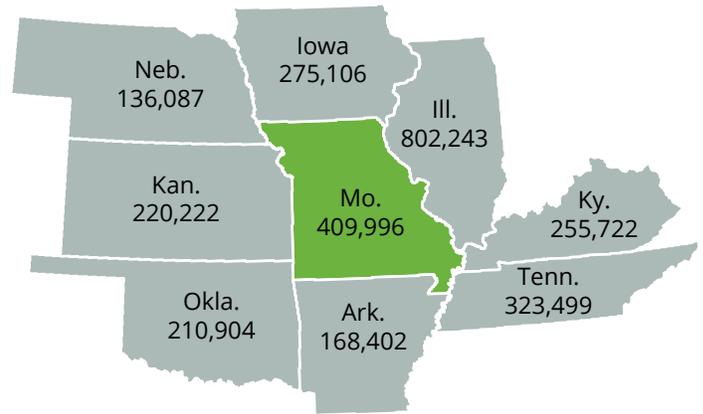
Source: 2016 American Community Survey (census.gov) 1-year estimates

*Joplin data from 2012-2016 American Community Survey 5-year estimates



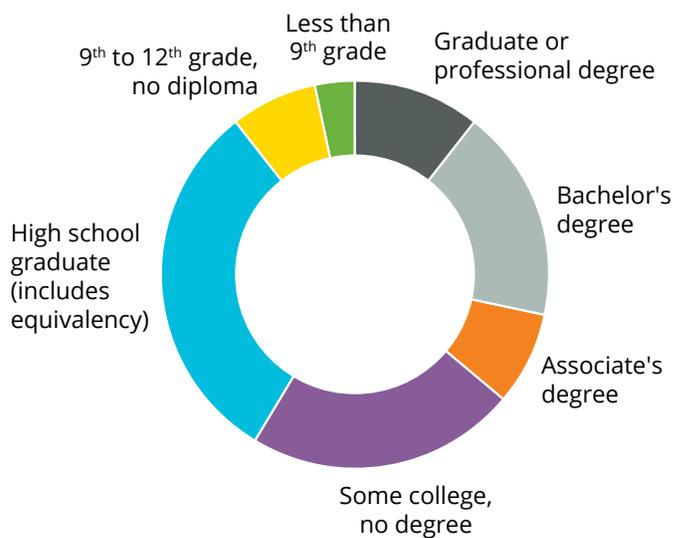
Students currently enrolled at universities in Missouri and surrounding states:

Source: Digest of Education Statistics, 2015



Educational Attainment

Source: 2016 American Community Survey (census.gov) 1-year estimates



Occupation Information for Call Centers

Customer Service Employment (Occupation Code 43-4051) by Metro

MSA	Total Employees	Hourly 10th percentile wage	Hourly median wage	Hourly 90th percentile wage
Cape Girardeau, MO-IL	360	\$10.18	\$13.75	\$19.70
Columbia, MO	1,130	\$10.23	\$14.51	\$22.18
Jefferson City, MO	1,320	\$9.48	\$15.51	\$24.60
Joplin, MO	1,350	\$9.97	\$13.33	\$19.96
Kansas City, MO-KS	26,810	\$10.53	\$16.35	\$25.68
St. Joseph, MO-KS	1,250	\$10.17	\$14.25	\$20.58
St. Louis, MO-IL	25,270	\$10.73	\$16.46	\$25.64
Springfield, MO	4,330	\$10.15	\$14.17	\$24.00
Phoenix-Mesa-Scottsdale, AZ	73,250	\$10.98	\$15.64	\$23.87
Tampa-St. Petersburg-Clearwater, FL	50,130	\$9.84	\$14.51	\$22.02
San Antonio-New Braunfels, TX	30,630	\$9.63	\$14.77	\$22.54
Salt Lake City, UT	29,340	\$11.41	\$15.49	\$23.73

Source: BLS, May 2017

Occupation Information for Call Centers

Occ Code	Occupation	Missouri Employment	Missouri Median Hourly Wage	US Median Hourly Wage
00-0000	All Occupations	2,788,680	\$16.85	\$18.12
11-1021	General and Operations Managers	43,270	\$40.23	\$48.27
15-1151	Computer User Support Specialists	13,370	\$21.26	\$24.14
41-4011	Sales Representatives, Wholesale and Manufacturing, Technical and Scientific Products	4,490	\$36.91	\$37.90
41-9041	Telemarketers	5,430	\$9.44	\$11.76
43-2011	Switchboard Operators, Including Answering Service	1,530	\$13.74	\$13.80
43-3011	Bill and Account Collectors	6,240	\$15.02	\$16.99
43-3031	Bookkeeping, Accounting, and Auditing Clerks	29,980	\$17.53	\$18.87
43-4011	Brokerage Clerks	1,550	\$20.79	\$23.94
43-4051	Customer Service Representatives	47,860	\$15.54	\$15.81
43-4171	Receptionists and Information Clerks	13,140	\$12.29	\$13.65
43-9021	Data Entry Keyers	4,520	\$14.33	\$14.87

Source: Bureau of Labor Statistics, Occupational Employment and Wage Estimates, May 2017

Call Center Saturation by Occupation

Metro area	Labor Force (1)	Total Employment (2)	Call Center Occupation Employment (3)	Occupational Employment Saturation
Cape Girardeau-Jackson, MO-IL	48,279	42,620	803	1.88%
Columbia, MO	97,985	92,910	2,552	2.75%
Jefferson City, MO	74,514	73,950	2,164	2.92%
Joplin, MO	84,369	78,040	2,320	2.97%
Kansas City, MO-KS	1,129,091	1,055,320	45,640	4.32%
Springfield, MO	229,011	204,320	8,420	4.12%
St. Joseph, MO-KS	65,209	53,270	1,799	3.38%
St. Louis, MO-IL	1,460,395	1,356,630	44,867	3.31%
Tampa-St. Petersburg-Clearwater, FL	1,538,404	1,280,170	78,530	6.13%
Phoenix-Mesa-Glendale, AZ	2,357,488	1,980,010	110,880	5.60%
Salt Lake City, UT	662,804	695,050	43,890	6.31%
San Antonio-New Braunfels, TX	1,188,532	1,003,370	47,580	4.74%

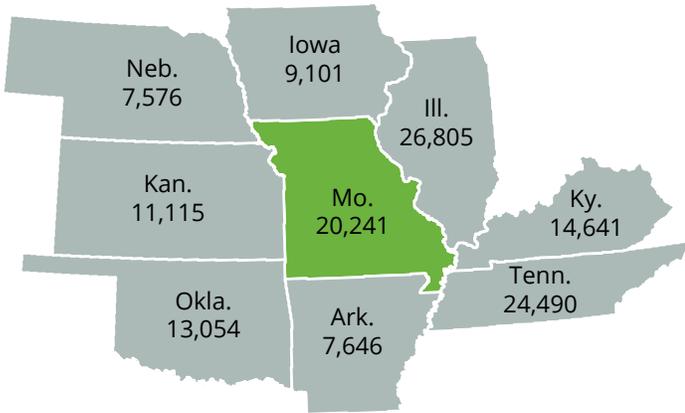
(1) Source: Bureau of Labor Statistics, April 2018

(2) Source: Bureau of Labor Statistics, Occupational Employment and Wage Estimates, May 2017, All Occupations

(3) Source: Bureau of Labor Statistics, Occupational Employment and Wage Estimates, May 2017, and EMSI, 2017 Employment for occupation codes 15-1151 Computer User Support Specialists, 43-4051 Customer Service Representatives, 43-9021 Data Entry Keyers, 43-4171 Receptionists and Information Clerks, 43-2011 Switchboard Operators, including Answering Service, and 41-9041 Telemarketers

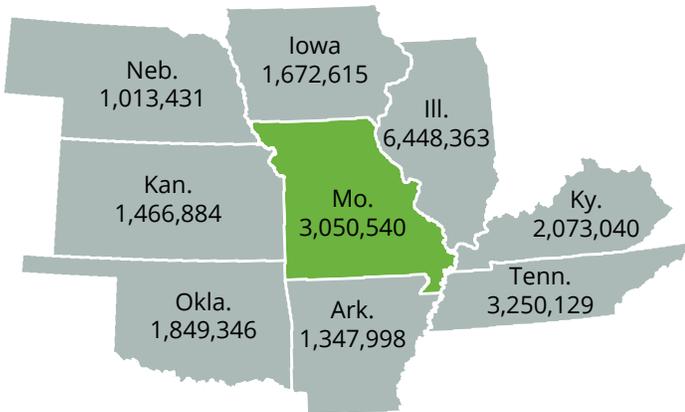
NAICS 5614 Business Support Services for Missouri vs Surrounding States

Source: BLS 2017



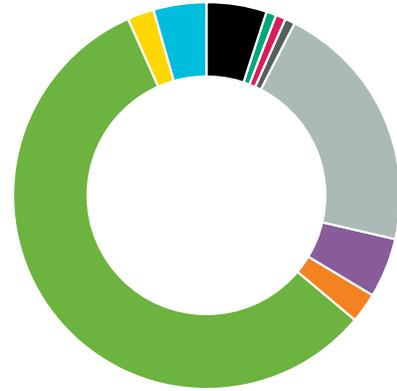
Civilian Labor Force for Missouri vs Surrounding States

Source: BLS, April 2018 data



Business Support Services Employment

Source: BLS 2017



- Document preparation services: **847**
- Telephone answering services: **491**
- Telemarketing and other contact centers: **11,552**
- Private mail centers: **535**
- Other business service centers: **1,006**
- Collection agencies: **4,261**
- Credit bureaus: **174**
- Repossession services: **142**
- Court reporting and stenotype services: **201**
- All other business support services: **1,032**

Business Support Services Employment: 20,241

Business Support Services Establishments: 980

Source: BLS 2017

Missouri's Strategic Location

- 600 mile radius
- 1,200 mile radius



Missouri's central location and easy to understand accent gives companies the talent and the workday flexibility to provide call center support nationwide. Missouri's central time zone allows companies to stretch the regular workday to conveniently service customers on both coasts.

Additionally, Missouri's stable and unique natural environment, cost-competitive business environment and convenient access to high-speed fiber, makes our state an attractive location for support services.

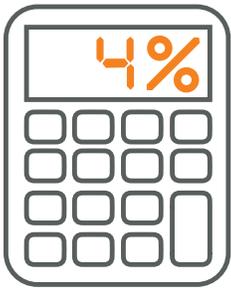
Missouri Reduces Your Risk and Your Costs

Missouri provides you with a solid business foundation, financial and otherwise. In Missouri, taxes and business costs don't eat up all of your company's profits.

Income Tax Allocation

Starting January 1, 2020, Missouri's corporate income tax rate dropped to 4 percent, making us one of the most tax-friendly states in the U.S. Missouri also moved to a single factor, market-based corporate income tax apportionment model based only on sales.

In addition, it is important to note that Missouri has not adopted worldwide or nationwide unitary tax assessment in computing multinational corporate income tax liability.



CORPORATE INCOME TAX RATE OF **4 PERCENT**, THE **2ND** LOWEST IN THE U.S.

Tax Exemptions for Manufacturers

Manufacturers locating in Missouri enjoy numerous tax advantages, including:

- Sales/use tax exemption on machinery and equipment used to establish a new or expand an existing facility
- Property tax exemption for inventories
- State sales tax and local use tax exemption on energy purchases

Certified Sites

Missouri's Certified Sites Program also reduces your risk by ensuring there has already been a comprehensive review of the availability of utilities, site access, environmental concerns, land use conformance, and potential site development costs. Having a site

"certified" reduces the risk associated with development of particular sites by providing up front and consistent information. Additionally, Missouri's 50+ years of a AAA bond rating is representative of our solid financial acumen and stable financial foundations.

Missouri has more than 47 rail served sites of 50+ acres or more and 180 industrial facilities with more than 50,000+ square feet (*LocationOne as of 11/5/2019*).

Workforce Development

Missouri One Start provides businesses with \$42 million of comprehensive pre-employment and customized training solutions to help them ramp up faster during an expansion. Missouri One Start's network of colleges and training facilities have the resources to meet each business's unique needs by delivering tailored pre-employment screening, employment marketing, and job specific training to make businesses more competitive. In addition, Missouri offers free community college through the A+ and Fast Track programs.

Our Services

Missouri is also committed to your growth. Our goal is to reduce your risk and provide first-class support from your initial site search to the day you open for business. Our team is ready to work with you and provide a "concierge service" as you consider where your next expansion will be.

Benefits like our low business and labor costs, reliable and inexpensive energy, aggressive and performance-based incentives, and a statewide commitment to attracting companies and investment, make Missouri a place where your company can come to grow and thrive. Whether it's in six weeks, six months, or six years, we are an expert resource to support you when the time is right to look at Missouri.



Subash Alias, CEO

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Working primarily out of the St. Louis office, Subash is the CEO and focuses on bringing jobs and investment to Missouri.



Cathleen Flournoy, VP, Business Recruitment

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Based in the Kansas City office, and focusing on multiple industry sectors, Cathleen generates, cultivates and closes business attraction opportunities to bring jobs and capital investment to Missouri.



Kylee Garretson, Director, Business Recruitment & Capacity Building

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Kylee actively manages business attraction projects for Missouri, provides support to the full business recruitment team, and manages Missouri's capacity building initiatives in communities across the state. She is based in the Kansas City office.



Deborah Price, VP, Business Recruitment & General Counsel

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Focusing mostly in domestic markets as well as South America and Israel, Deborah is generating, cultivating and closing opportunities with companies across multiple industry sectors. As General Counsel, Deborah serves as the Partnership's senior attorney. She is based in the St. Louis office.



Dennis Pruitt, CEcD, VP, Business Development

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Dennis, who is based in the St. Louis office, works across multiple industry sectors, primarily targeting companies in Europe, Asia, and Canada to bring new jobs and investment into Missouri.



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Missouri Partnership is a public-private economic development organization focused on attracting new jobs and investment to the state and promoting Missouri's business strengths. We work in partnership with the Hawthorn Foundation, the Missouri Department of Economic Development, the State of Missouri, and economic development agencies across the state. • www.missouripartnership.com