

CATAWBA LWIA WORKFORCE REPORT 2012



The *Catawba Workforce Report* is published by the Labor Market Information (LMI) Department of the South Carolina Department of Employment and Workforce. The information and analyses provided in this publication are based on data collected from sources throughout South Carolina and the United States.

About SC DEW and LMI:

The Labor Market Information Department compiles and publishes employment statistics, job forecasts, wage data, demographics, and other labor market information to help public and private organizations, researchers, and others better understand today's complex workforce.

The LMI Department produced this report under the leadership of:

Executive Director - Cheryl Stanton
Interim Deputy Assistant Executive Director - Kerry Paul
Labor Market Information Director - Brenda Lisbon

South Carolina Department of Employment and Workforce
1550 Gadsden Street
Columbia, South Carolina 29201
(803) 737-2660
www.dew.sc.gov
www.scworkforceinfo.com



TABLE OF CONTENTS

EXECUTIVE SUMMARY	VI
INTRODUCTION	VII
ECONOMIC DISCUSSION: A CURRENT PICTURE OF THE WORKFORCE	1
EMPLOYMENT BY INDUSTRY	1
LOCATION QUOTIENT	1
AVERAGE ANNUAL WAGE BY INDUSTRY	2
OCCUPATIONAL EMPLOYMENT	3
SKILLS DATA	4
EMPLOYMENT AND UNEMPLOYMENT	6
NEW STARTUP FIRMS	8
EMPLOYERS BY SIZE OF ESTABLISHMENT	9
SUPPLY: WHAT'S OUT THERE?	10
POPULATION BY AGE	10
POPULATION CHANGE AND MIGRATION	11
COMMUTING PATTERNS	12
EDUCATIONAL ATTAINMENT	12
CAREER CLUSTERS SELECTED BY HIGH SCHOOL STUDENTS	13
DEGREES AWARDED	15
CHARACTERISTICS OF UI CLAIMS BY OCCUPATION	16
UNEMPLOYMENT INSURANCE CLAIMANT CHARACTERISTICS	17
DEMAND: WHAT DO WE NEED?	20
ONLINE JOB ADVERTISEMENTS	20
INDUSTRY PROJECTIONS	20
OCCUPATIONAL PROJECTIONS	21
SKILLS OF PROJECTED OCCUPATIONS	24
WORKFORCE CHALLENGES	25
CONCLUSION	27

TABLE OF FIGURES

FIGURE 1: CATAWBA LWIA EMPLOYMENT BY INDUSTRY - 3RD QUARTER 2012.....	1
FIGURE 2: NOTABLE CATAWBA LWIA LOCATION QUOTIENTS - 2011	2
FIGURE 3: ANNUAL AVERAGE WAGE BY INDUSTRY - 3RD QUARTER 2012.....	3
FIGURE 4: TOP 20 OCCUPATIONS WITH WAGES - 2012.....	4
FIGURE 5: TOP OCCUPATIONS BY SKILL CLASSIFICATION - CATAWBA 2012.....	5
FIGURE 6: EMPLOYMENT - 2002-2012.....	6
FIGURE 7: UNEMPLOYMENT - 2002-2012	7
FIGURE 8: ANNUAL UNEMPLOYMENT - 2002-2012	8
FIGURE 9: MONTHLY UNEMPLOYMENT RATE - MARCH 2011-APRIL 2013.....	8
FIGURE 10: NEW STARTUP FIRMS - 2007-2012.....	9
FIGURE 11: EMPLOYERS BY SIZE OF ESTABLISHMENT - 3RD QUARTER 2012.....	9
FIGURE 12: POPULATION BY AGE	10
FIGURE 13: POPULATION PROJECTIONS TO 2030.....	11
FIGURE 14: POPULATION MIGRATION - 2011 - 5-YEAR ESTIMATE.....	11
FIGURE 15: COMMUTING PATTERNS - 2010.....	12
FIGURE 16: EDUCATIONAL ATTAINMENT - CATAWBA AND SOUTH CAROLINA 2011	12
FIGURE 17: EDUCATIONAL ATTAINMENT - CATAWBA 2011.....	13
FIGURE 18: PERCENT OF STUDENTS DECLARING A CAREER CLUSTERS IN CATAWBA AND SC - 2012	14
FIGURE 19: CAREER CLUSTERS - 2012.....	15
FIGURE 20: TOP 20 MAJORS IN CATAWBA - 2011.....	16
FIGURE 21: CHARACTERISTICS OF UI CLAIMS BY OCCUPATION - APRIL 2013.....	17
FIGURE 22: UI CLAIMANT CHARACTERISTICS - APRIL 2013.....	18
FIGURE 23: CATAWBA HWOL - APRIL 2013 BY MAJOR GROUP.....	20
FIGURE 24: INDUSTRY PROJECTIONS - 2008-2018	21
FIGURE 25: GROWING OCCUPATIONS - 2008-2018.....	22
FIGURE 26: EDUCATION FOR TOP 50 PROJECTED OCCUPATIONS	23
FIGURE 27: TOP 20 PROJECTED DECLINING OCCUPATIONS IN CATAWBA - 2008-2018.....	24
FIGURE 28: SKILL LEVELS.....	24
FIGURE 29: COMPARISON OF SUPPLY AND DEMAND.....	25

EXECUTIVE SUMMARY

The employment leaders for Catawba Local Workforce Investment Area (LWIA) are Manufacturing, Retail Trade, and Healthcare and Social Assistance. Employment growth is anticipated by 2018 in several industries, especially Health Care and Social Assistance and Education Services. The highest wages are paid by the Utilities and the Real Estate and Rental and Leasing industries.

The LWIA's population grew by 25.7 percent from 2000 to 2010, and it has a higher proportion of the population in the prime working age of 35-49 than the state overall.

Employment is rising, and unemployment is declining; and though, the LWIA has a historically higher unemployment rate than the state, the gap widened after the recession. Employment is concentrated in Rock Hill, but nearly 27,000 more people leave the LWIA for work than enter it every day. Manufacturing is the largest industry represented in unemployment claims.

Catawba has a higher proportion of residents with more than a high school education to the bachelor's degree education level than the state does as a whole. For projected growing jobs, 4 percent require no diploma, 28 percent require a diploma, 16 percent require an associate's degree or training, and 52 percent require a bachelor's degree or more.

Catawba LWIA businesses desire a trained workforce with the current focus being on healthcare, business, and marketing services. Technology has become part of most occupations, requiring continuous training and skill-upgrading. A challenge for the LWIA is to match the skill levels of the workforce with open positions. There may be a mismatch between the employer's skill demands and the occupations that the worker will accept.

Catawba LWIA has several factors working in its favor. It has a large city (Rock Hill) in the area close to the expanding major metropolitan area of Charlotte, N.C. The educational and training institutions are anchored by the reputation of Winthrop University, which added Vivian Moore Carroll Hall to its business facilities in 2009.

The patterns and trends described in this report offer cause for both optimism and concern. Catawba LWIA has an exciting future ahead of it, and it can lead the way in delivering the skilled talent and economic opportunities that businesses and workers in the area deserve.

INTRODUCTION

The Catawba Local Workforce Investment Area is composed of Chester, Lancaster, and York counties. All three were formed in 1785 and were named after their respective towns in Pennsylvania. The area is located in the north central part of the state and shares several borders with North Carolina. Water from the Catawba, Lynches, and Broad rivers powered Textile Manufacturing during the last century and today.

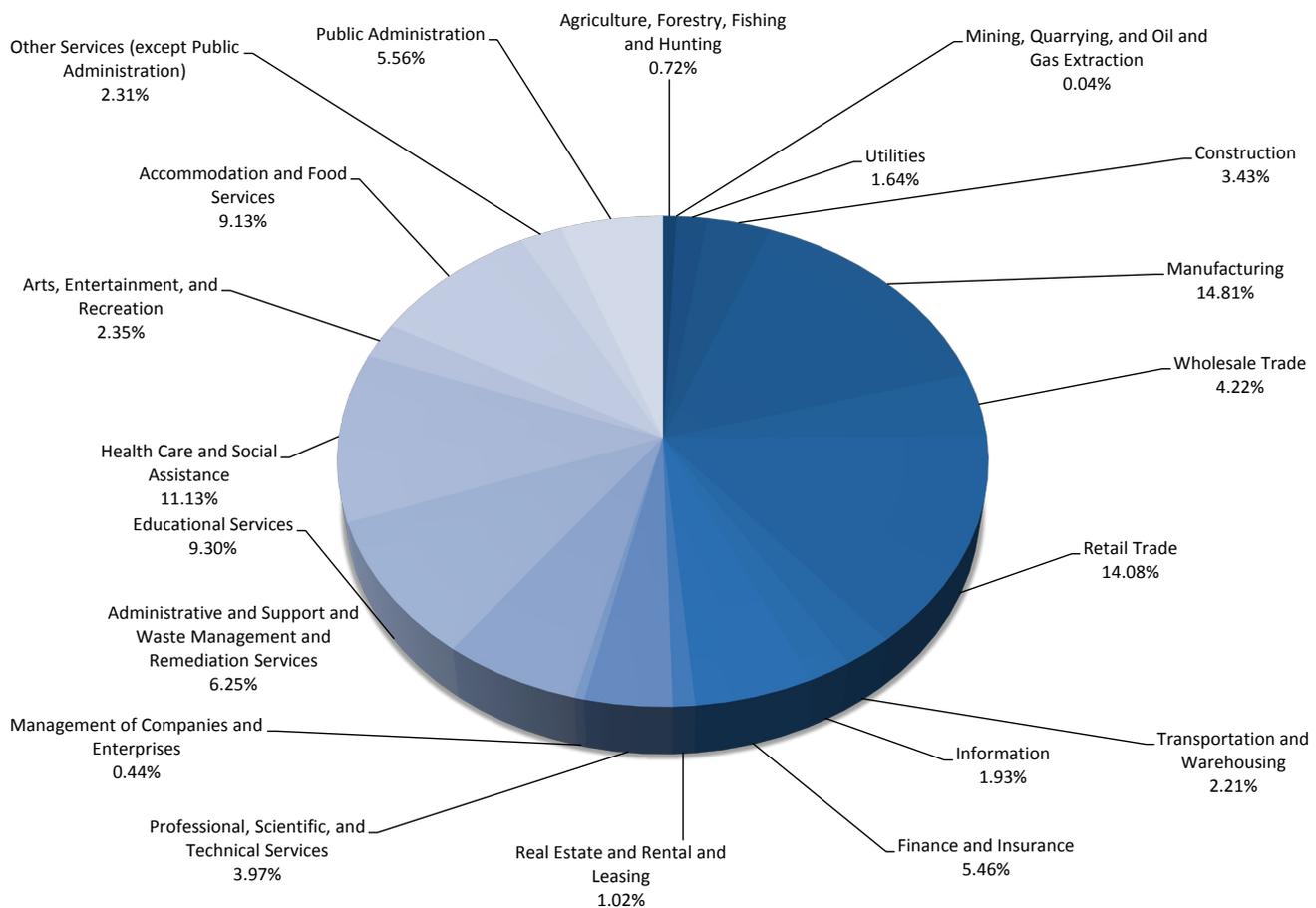
The economic changes this year in the Catawba LWIA demonstrate the shifting needs of employers and employees. Cultivating an understanding of the workforce allows all three counties to respond to anticipated future needs. Analyses help to identify the gap between what the workforce has in the way of talent and skills (supply), and what it may need in the future (demand).

The purpose of the Catawba LWIA Workforce Report is to present a comprehensive view of the status of Catawba counties' economy and workforce. The report includes an analysis of Catawba LWIA's workforce, industries, economic climate, and factors that will affect all three. Forecasts will be made for the workforce, industries, and the economy.

ECONOMIC DISCUSSION: A CURRENT PICTURE OF THE WORKFORCE

EMPLOYMENT BY INDUSTRY

Figure 1: Catawba LWIA Employment By Industry - 3rd Quarter 2012



Source: Bureau of Labor Statistics (BLS), SC Department of Employment and Workforce (SCDEW), Quarterly Census of Employment and Wages (QCEW)

The Manufacturing and Retail Trade industries are the top two sectors employing workers in the Catawba LWIA. Industries like Health Care and Social Assistance and Educational Services are healthy and flourishing, while another like Construction is still recovering from the recession. The 2010 per capita income for a Catawba LWIA resident is \$28,412, which is up 25 percent from 2000.¹ Economic growth has taken place in the past decade to enhance the LWIA's workers, although the area is still recovering from a tough business cycle.

LOCATION QUOTIENT

A location quotient (LQ) is a useful tool for determining the concentration of workers in a given area. Location quotients compare the regional share of employment in a particular industry to the national share of employment in the same industry. The resulting quotient reveals the degree of regional specialization or concentration in an industry and provides insight into what makes the area unique in comparison to the national average. An LQ of 1.0 means the concentration of jobs in that industry matches the nation's value. Location quotients higher than 1.0 indicate the level of specialization the area has in particular sectors. Lower quotients can indicate a possible area that could be expanded.

1 US Bureau of Economic Analysis

Figure 2: Notable Catawba LWIA Location Quotients - 2011

Industry and Sectors	Location Quotient
<i>Chester County</i>	
Nonmetallic Mineral Product Manufacturing	36.4
Truck Transportation	7.8
Chemical Manufacturing	4.2
<i>Lancaster County</i>	
Textile Mills	18.2
Waste Management and Remediation Services	2.7
Forestry and Logging	2.4
<i>York County</i>	
Textile Mills	9.4
Paper Manufacturing	5.2
Wood Product Manufacturing	2.5

Source: US Department of Labor, Bureau of Labor Statistics - http://data.bls.gov/location_quotient

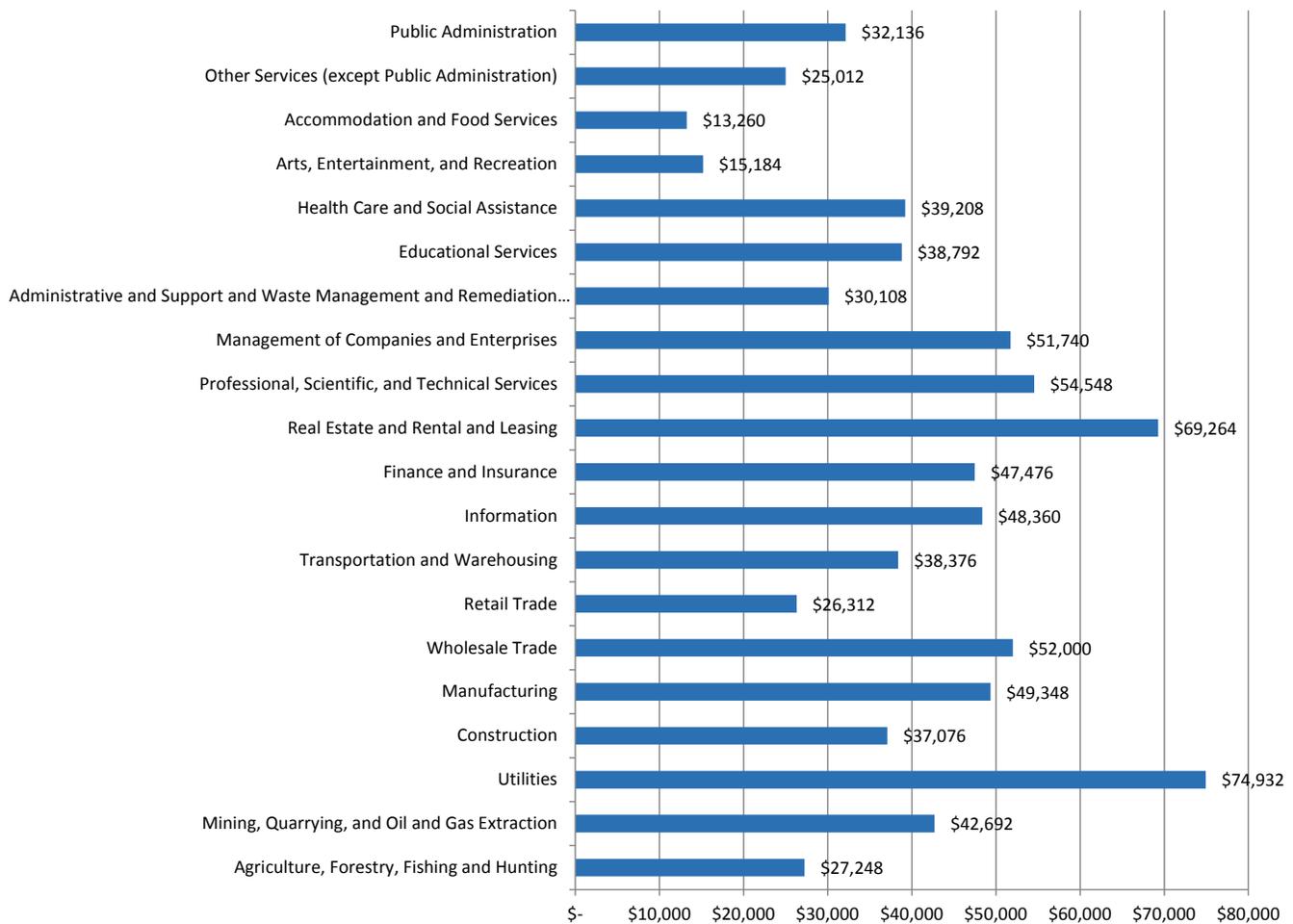
Nonmetallic Mineral Product Manufacturing and Textile Mills top the most concentrated industries in this area with location quotients over nine. The former industry includes clay, glass, cement and concrete, lime, and other nonmetallic mineral manufacturing and is focused in Chester County. Textile Mill companies transform a basic fiber into a product like yarn or fabric and are a highly-focused sector in Lancaster and York counties. Other manufacturing sectors located throughout the area include chemical, wood product, and paper.

AVERAGE ANNUAL WAGE BY INDUSTRY

The annual wages for utility workers are usually among the highest for any LWIA industry. These workers have a wide range of education (high school diploma to PhD) and tend to stay in their jobs for a very long time, which increases the average wage as small raises accumulate over time. The Real Estate and Rental and Leasing industry has the second highest average wage in the LWIA.

High wage industries like Information, Professional, Scientific, and Technical Services, and Finance and Insurance usually require at least a bachelor's degree. Having an education is an excellent way to enter a high-wage industry and have more options for employment.

Figure 3: Annual Average Wage by Industry - 3rd Quarter 2012



Source: BLS, SCDEW, QCEW

OCCUPATIONAL EMPLOYMENT

When examining the current occupational employment in the area, one can observe that some of the top 20 occupations are low-skill, low-pay jobs. These jobs, like Cashiers, Food Preparation and Servers, and Janitors, have high turnover. These are not necessarily the most robust jobs as far as wages, but they are jobs.

Figure 4 lists occupations, such as Registered Nurses, Elementary School Teachers, and First-Line Supervisors, that pay a higher wage. With Manufacturing, Retail Trade, and Healthcare comprising 40 percent of the employment in Catawba, the positions of Team Assemblers; Laborers and Material Movers; Retail Salespersons; and Registered Nurses, not surprisingly, are listed among the top occupations.

Figure 4: Top 20 Occupations with Wages - 2012

Occupational Title	Total Employment	Hourly Average Wage (\$)
Total, All Occupations	101,280	18.81
Cashiers	3,660	9.07
Retail Salespersons	3,320	11.83
Combined Food Preparation and Serving Workers	2,650	8.69
Team Assemblers	2,240	13.82
Office Clerks, General	1,990	12.80
Laborers and Freight, Stock, and Material Movers	1,980	11.77
Customer Service Representatives	1,950	15.59
Stock Clerks and Order Fillers	1,760	10.75
Registered Nurses	1,640	26.63
General and Operations Managers	1,540	48.37
Secretaries and Administrative Assistants, Except	1,480	14.33
Janitors and Cleaners, Except Maids and Housekeeping	1,430	10.21
Elementary School Teachers, Except Special Education	1,390	28.15
Maintenance and Repair Workers, General	1,370	18.28
Bookkeeping, Accounting, and Auditing Clerks	1,330	16.60
Bill and Account Collectors	1,310	16.63
Waiters and Waitresses	1,290	8.93
First-Line Supervisors of Retail Sales Workers	1,200	19.04
First-Line Supervisors of Office and Administrative	1,190	22.79
Heavy and Tractor-Trailer Truck Drivers	1,130	16.61

Source: BLS, SCDEW, Occupational Employment Statistics (OES)

SKILLS DATA

Employers are beginning to see that a person's skills, in addition to their education, may help in determining who to hire. Many times the degree is not as important as the skills gained through specialized training and/or experience. In order to be able to determine the current level of skills in the area, the top 50 current occupations by employment are presented, and assigned a low, middle, or high skill designation to that occupation. The definitions for those skills levels are:

- **LOW:** No high school or GED, or high school/GED with less than one year experience and no on-the-job-training (OJT), or short-term OJT
- **MIDDLE:** High school/GED with one year experience, or moderate OJT, or long-term OJT, or apprenticeship, or postsecondary vocational training, or some college, or associate's degree, or less than a bachelor's degree
- **HIGH:** Bachelor's degree or higher

In the Catawba area, 25 of the top 50 jobs in 2011 are considered low-skill jobs. Twenty are middle skill, and five are high-skill occupations.

Figure 5: Top Occupations By Skill Classification - Catawba 2012

Stillset: LOW
Cashiers
Childcare Workers
Combined Food Preparation and Serving Workers
Construction Laborers
Cooks, Fast Food
Cooks, Restaurant
Customer Service Representatives
Helpers--Production Workers
Home Health Aides
Industrial Truck and Tractor Operators
Janitors and Cleaners, Except Maids and Housekeeping
Laborers and Freight, Stock, and Material Movers
Landscaping and Groundskeeping Workers
Light Truck or Delivery Services Drivers
Loan Interviewers and Clerks
Office Clerks, General
Packers and Packagers, Hand
Personal Care Aides
Receptionists and Information Clerks
Retail Salespersons
Secretaries and Administrative Assistants
Shipping, Receiving, and Traffic Clerks
Stock Clerks and Order Fillers
Teacher Assistants
Waiters and Waitresses
Skillset: MIDDLE
Automotive Service Technicians and Mechanics
Bill and Account Collectors
Bookkeeping, Accounting, and Auditing Clerks
Bus Drivers, School or Special Client
First-Line Supervisors of Food Preparation and Serving Workers
First-Line Supervisors of Office and Administrative Workers
First-Line Supervisors of Production and Operating Workers
First-Line Supervisors of Retail Sales Workers
General and Operations Managers
Heavy and Tractor-Trailer Truck Drivers
Loan Officers
Machinists
Maintenance and Repair Workers, General
Nursing Assistants
Pharmacy Technicians
Police and Sheriff's Patrol Officers
Registered Nurses
Sales Representatives, Wholesale and Manufacturing
Substitute Teachers
Team Assemblers
Skillset: HIGH
Accountants and Auditors
Elementary School Teachers, Except Special Education
Management Analysts
Middle School Teachers, Except Special and Career/Technical Education
Secondary School Teachers, Except Special and Career/Technical Education

Source: BLS, SCDEW, OES, Workforce Intelligence (WI)

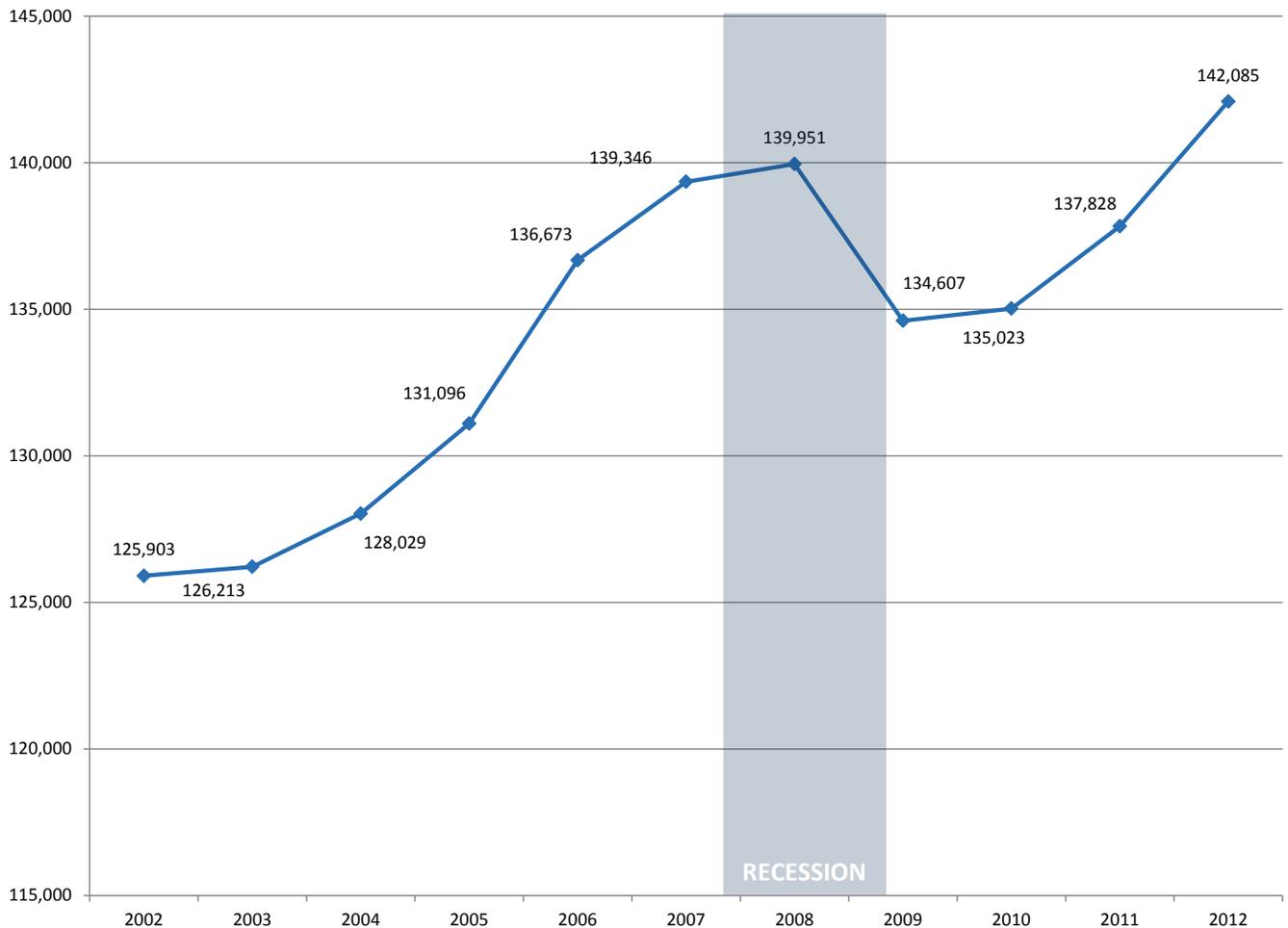
EMPLOYMENT AND UNEMPLOYMENT

A crucial indicator of the health of a workforce is its labor force levels. Labor force data count residents who are employed and unemployed. There are a few Federal definitions that will make discussion of the labor force a little easier to understand.

- Employed: Persons 16 years old or older who worked for pay any time during the week that includes the 12th of the month
- Unemployed: Persons 16 years old or older who are not working but want a job, and are able and willing to work
- Labor Force: Employed plus unemployed
- Unemployment Rate: Unemployment divided by labor force

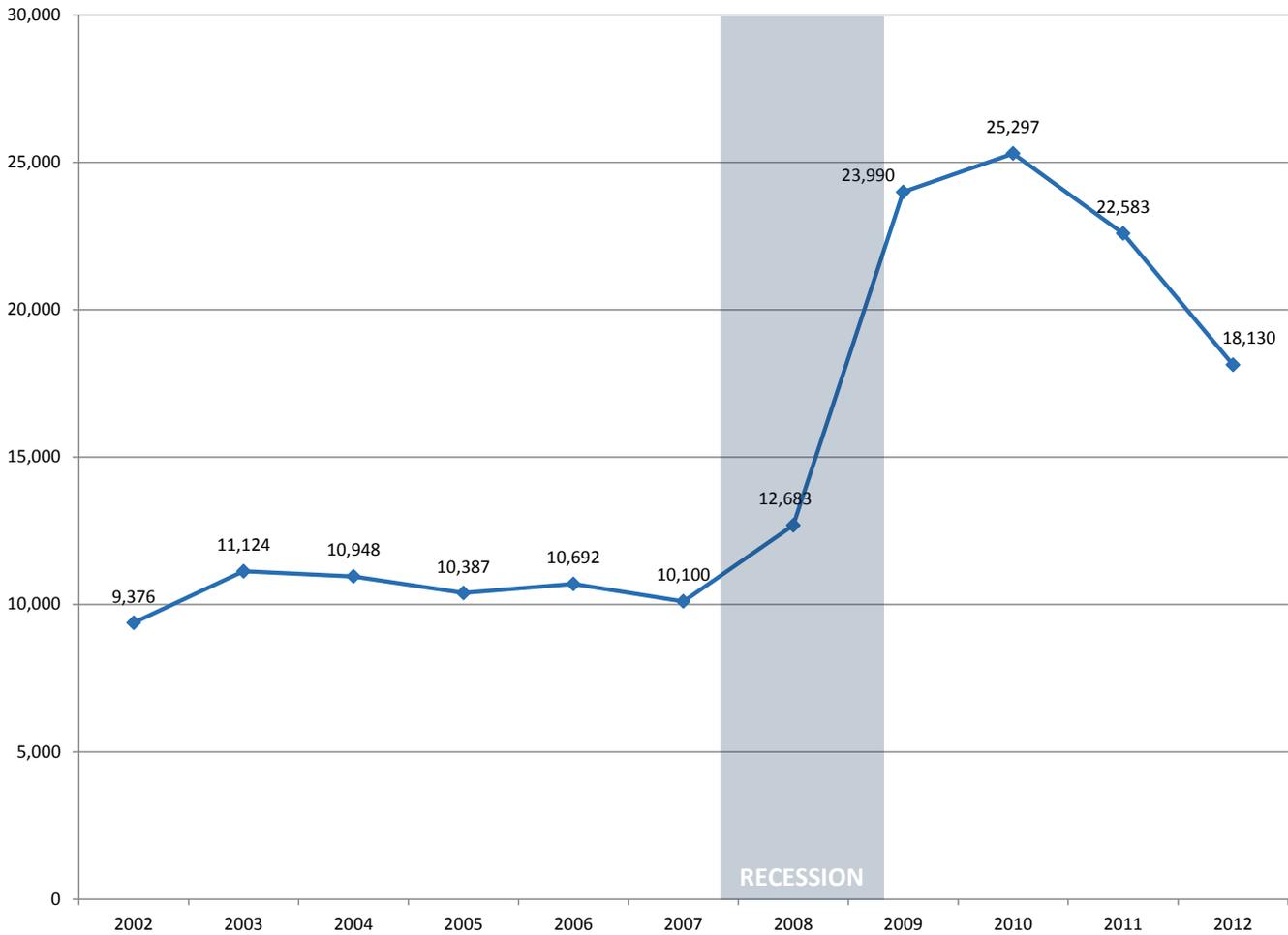
In Figure 6, the recession (officially from December 2007 through June 2009) had a great effect on the labor force. Employment dropped, and unemployment increased by 138 percent.

Figure 6: Employment - 2002-2012



Source: BLS, SCDEW, Local Area Unemployment Statistics (LAUS)

Figure 7: Unemployment - 2002-2012

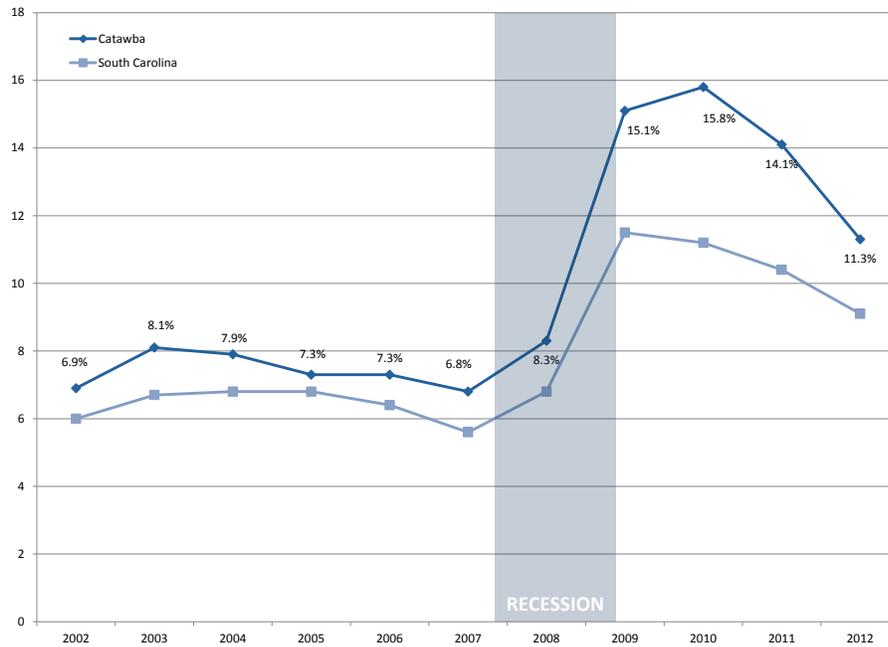


Source: BLS, SCDEW, LAUS

Tracking annual unemployment rates give a good snapshot of the state of an area's workforce. Annual rates smooth out the usual ups and downs of a month-to-month rate (due to normal seasonal or cyclical changes) to give a more accurate picture.

Figure 8 shows the annual rates for the Catawba LWIA area and South Carolina. Catawba has consistently been above the state's rate, and the gap widened after the recession. During the recession, the Catawba rate more than doubled from 6.8 percent in 2007 to 15.1 percent in 2009.

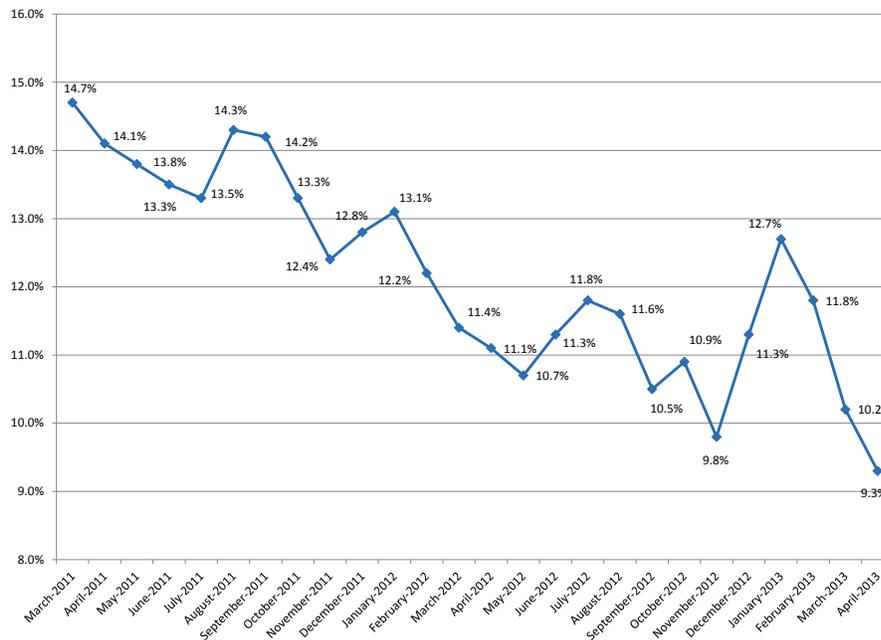
Figure 8: Annual Unemployment - 2002-2012



Source: BLS, SCDEW, LAUS

Figure 9 illustrates that the monthly unemployment rate has seen wide fluctuations since March 2011. The area seems to be steadily recovering from the recession.

Figure 9: Monthly Unemployment Rate - March 2011-April 2013



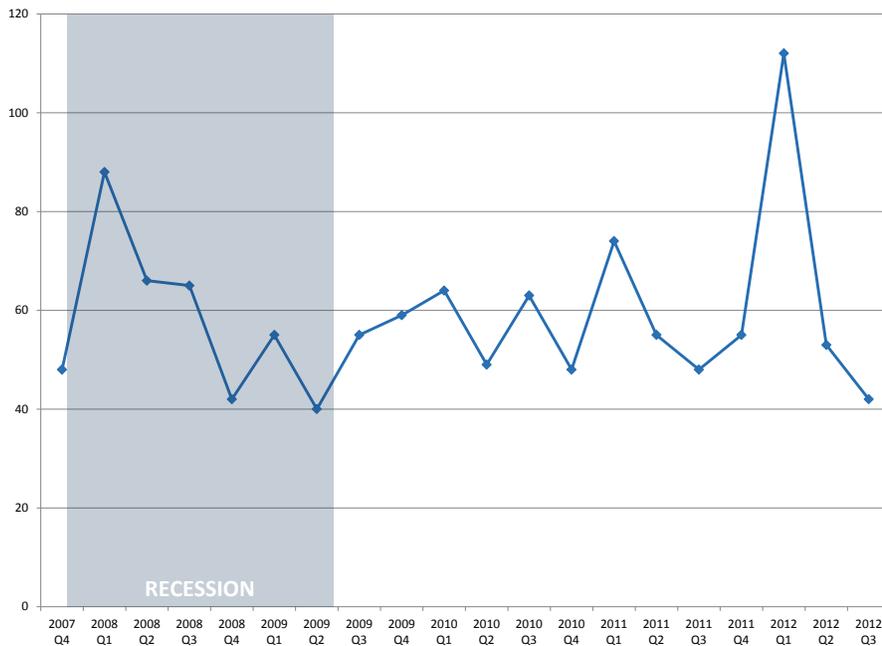
Source: BLS, SCDEW, LAUS

NEW STARTUP FIRMS

One way to see if an economy is improving is to examine data about startup firms. An increase in new companies might be an indicator of expansion in the area, whereas a drop in new firms shows a lack of confidence in the future. (Note: There is almost always a spike in startups in the first quarter

of the year.) Again, the recession had a major impact on normal business births and deaths. Start-ups have been steady in the area with a large increase in early 2012.

Figure 10: New Startup Firms - 2007-2012



Source: BLS, SCDEW, QCEW

EMPLOYERS BY SIZE OF ESTABLISHMENT

By far, the largest category of business size in the area is small business. Small businesses (or establishments) are defined in South Carolina as companies employing 49 or fewer people. The Catawba LWIA has 94 percent of establishments designated as small businesses, and South Carolina as a whole has 93 percent.

Small businesses may need more support and assistance than larger companies because they may not have a designated human resources department or person. They may rely on other resources, such as SC Works Centers, for help with hiring, training, or screening job candidates.

Figure 11: Employers by Size of Establishment - 3rd Quarter 2012

Employees	Catawba	South Carolina
0 to 4	3,455	63,766
5 to 9	1,107	19,667
10 to 19	728	13,316
20 to 49	525	9,881
50 to 99	209	3,907
100 to 249	112	2,433
250 to 499	30	757
500 to 999	16	328
1000 +	7	264

Source: BLS, SCDEW, QCEW

SUPPLY: WHAT'S OUT THERE?

A manufacturing assembly line needs to have resources and supplies on-hand so that the line does not have to stop. The same is true for the workforce. The supply of workers needs to be of the right quantity and quality to do the job. Is the supply of workers in line with what the companies in the Catawba LWIA need? Seven streams of workforce supply provide an indication: population, commuting, education of the population, clusters of high school students, awards earned at higher education institutions, and characteristics of unemployment insurance claims and claimants.

POPULATION BY AGE

Age distribution in the area is similar to the state and the country with two exceptions. In the 20-29 age cohorts, Catawba has a notably lower proportion of population, but in the 35-49 age cohorts, the LWIA has a markedly higher proportion of population.

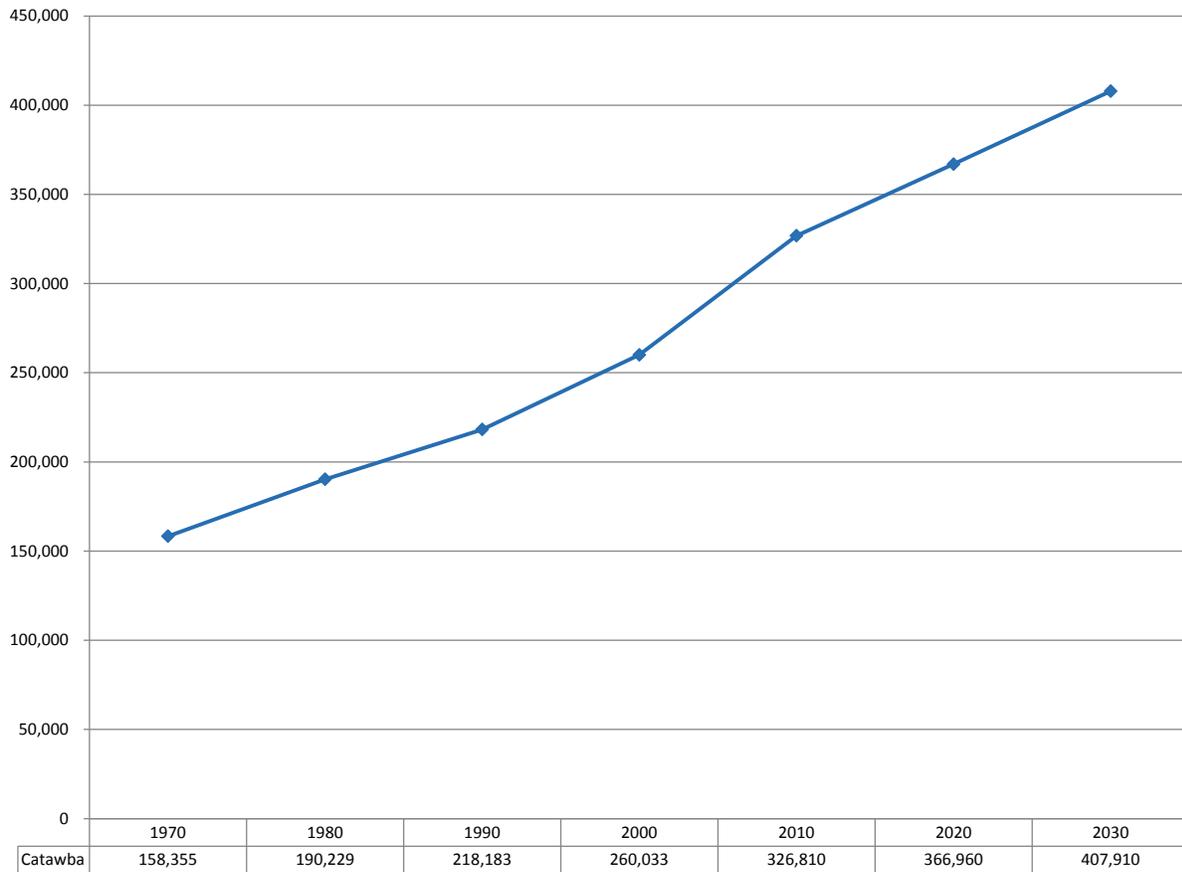
Figure 12: Population by Age

Age Range	Catawba	SC	US
0-4	6.8%	6.5%	6.6%
5-9	6.9%	6.4%	6.6%
10-14	7.0%	6.5%	6.7%
15-19	7.0%	7.2%	7.2%
20-24	6.0%	7.2%	7.0%
25-29	6.0%	6.6%	6.8%
30-34	6.3%	6.2%	6.4%
35-39	7.3%	6.5%	6.6%
40-44	7.5%	6.8%	7.0%
45-49	7.6%	7.2%	7.4%
50-54	7.1%	7.0%	7.2%
55-59	6.3%	6.5%	6.3%
60-64	5.8%	5.9%	5.3%
65-69	4.2%	4.5%	3.9%
70-74	3.1%	3.3%	3.0%
75-79	2.4%	2.5%	2.4%
80-84	1.5%	1.7%	1.9%
85 and older	1.1%	1.5%	1.7%

Source: US Bureau of Census, American Community Survey (ACS)

POPULATION CHANGE AND MIGRATION

Figure 13: Population Projections to 2030



Source: US Census Bureau, Census 2000, SC Department of Health and Environmental Control - Vital Records Department. Population projections calculated by SC Budget and Control Board, Office of Research and Statistics

After a large jump in population from 2000 to 2010 (up 25.7 percent), growth is projected to increase by over 1 percent per year to 2030.

Figure 14: Population Migration - 2011 - 5-Year Estimate

	Total	Moved From Different State	Moved From Abroad	Moved From Different County	Moved Within Same County
Population 1 year and over	324,443	3.9%	0.2%	1.5%	8.2%
Hispanic or Latino origin (of any race)	12,802	10.8%	0.7%	2.1%	11.0%
White alone, not Hispanic or Latino	230,254	3.8%	0.2%	1.3%	7.1%
Population 25 Years and Over					
Less than high school graduate	35,822	1.9%	0.1%	2.6%	7.6%
High school graduate/GED	67,425	3.2%	0.1%	0.7%	6.9%
Some college or associate's degree	63,034	4.0%	0.2%	0.9%	6.5%
Bachelor's degree	35,396	4.9%	0.2%	0.8%	5.2%
Graduate or professional degree	16,424	5.2%	0.2%	0.7%	4.6%

Source: US Census Bureau, ACS, SCDEW

In-migration (people moving into Catawba) shows that about 5.4 percent of residents with a graduate degree came from out of state or out of the country. The proportion of Hispanics that moved into Catawba from another state is nearly 11 percent, while for Whites the proportion is less than 4 percent. More than triple the percent of Hispanics came from abroad than Whites did. Though nearly 14 percent of residents moved, only 4.1 percent came from outside of South Carolina.

COMMUTING PATTERNS

Most of the workers (58 percent) of Catawba live and work in the LWIA. The tables in Figure 15 show that over 21,000 workers commute in from other areas to work in the LWIA. The Charlotte area draws a sizeable portion of Catawba LWIA's residents out of the area to work. Nearly 27,000 more employees commute out of the area than come in to the LWIA to work.

Figure 15: Commuting Patterns - 2010

To Catawba WIA From	21,087	From Catawba WIA To	48,030
Mecklenburg County, NC	10,629	Mecklenburg County, NC	36,107
Union County, NC	2,124	Gaston County, NC	2,874
Gaston County, NC	1,932	Union County, NC	1,781
Kershaw County, SC	790	Richland County, SC	1,139
		Kershaw County, SC	758

Source: US Census Bureau, ACS

EDUCATIONAL ATTAINMENT

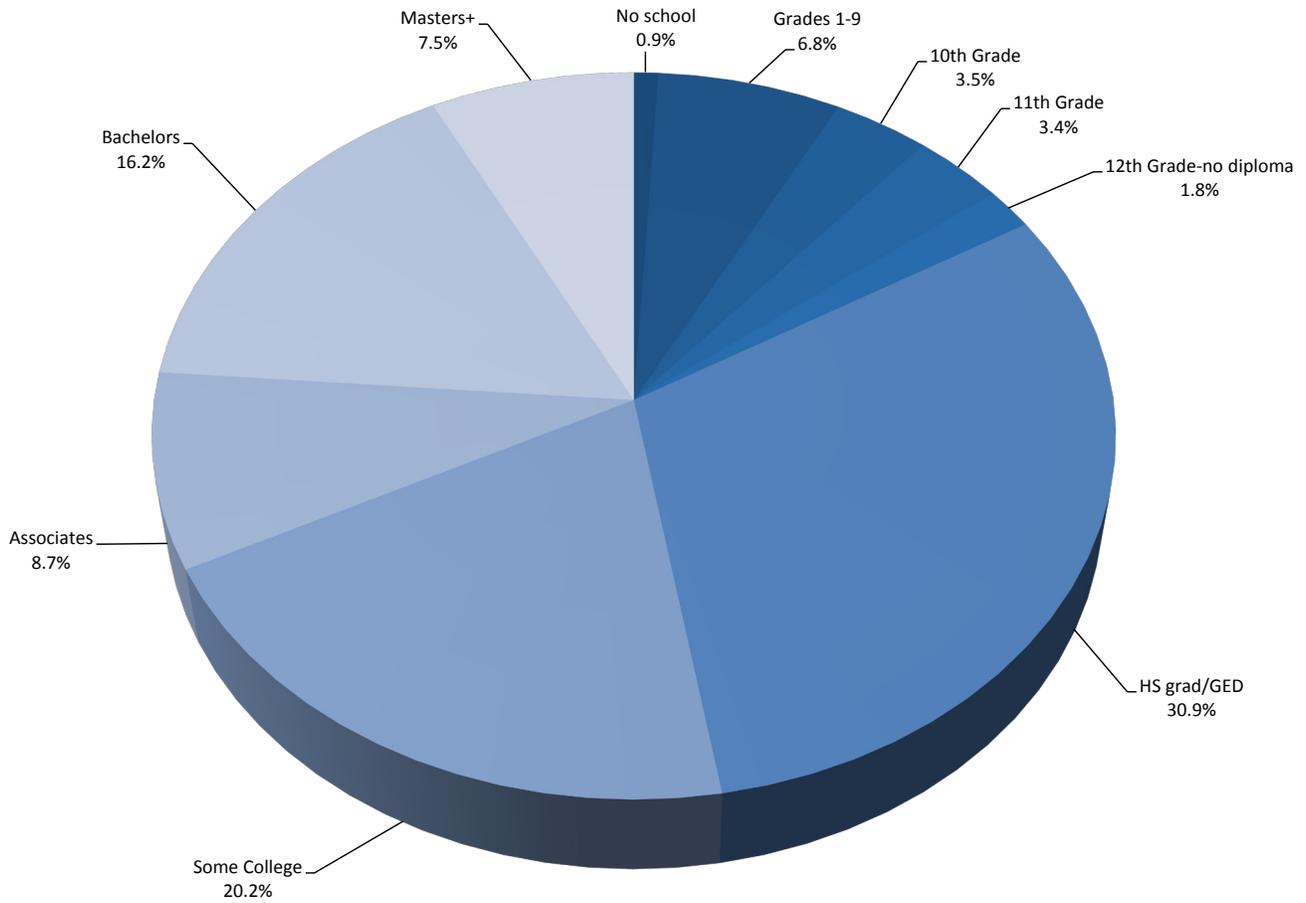
The Catawba LWIA has a higher concentration of residents with some college, associate's or bachelor's degree than the state. The Catawba LWIA has the same percent of residents with a high school diploma or less that the state as a whole but a lower proportion of residents with master's degrees or higher.

Figure 16: Educational Attainment - Catawba and South Carolina 2011

Education Level	Catawba	SC
No school	0.9	1.1
Grades 1-9	6.8	7.0
10th Grade	3.5	3.3
11th Grade	3.4	3.2
12th Grade-no diploma	1.8	1.8
HS grad/GED	30.9	30.9
Some College	20.2	20.1
Associates	8.7	8.4
Bachelors	16.2	15.6
Masters+	7.5	8.6

Source: US Census Bureau, ACS, SCDEW

Figure 17: Educational Attainment - Catawba 2011

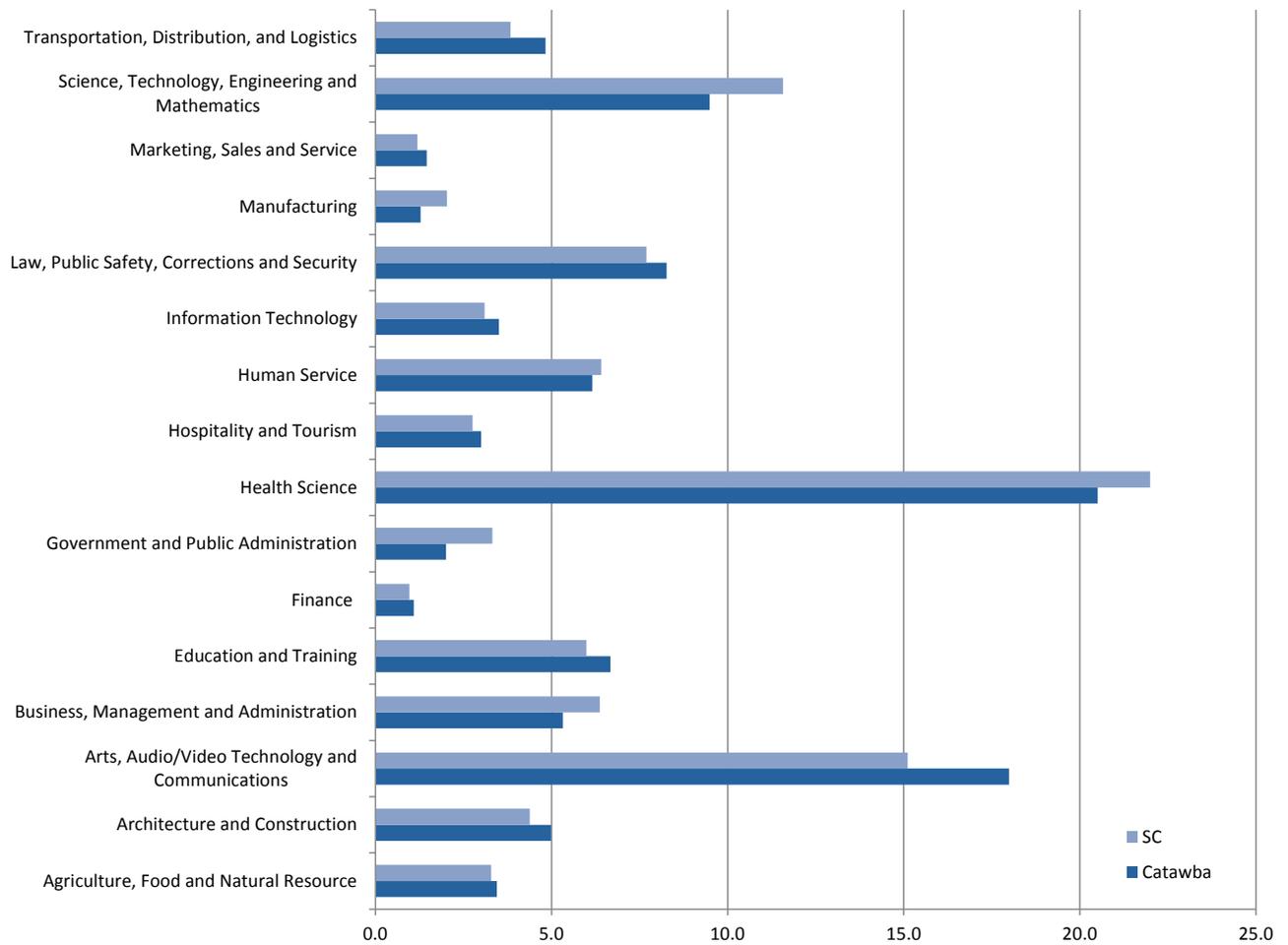


Source: US Census Bureau, ACS, SCDEW

CAREER CLUSTERS SELECTED BY HIGH SCHOOL STUDENTS

Eighth-grade students in South Carolina are required to choose a career cluster to concentrate on to lead them to a post-high school job or college major. There are 16 career clusters.

Figure 18: Percent of Students Declaring a Career Clusters In Catawba and SC - 2012



Note: Declared clusters for students declaring a specific cluster on their primary Electronic Individual Graduation Plan (e-IGP) for 2011-2012 year

Source: SC Department of Education

Many students in the Catawba area have chosen the Health Science career cluster in response to news of a shortage of healthcare workers in South Carolina. In keeping with the state trend, the area's students also picked the Arts, Audio/Video Technology and Communications cluster and the Science, Technology, Engineering and Math (STEM) cluster.

Figure 19: Career Clusters - 2012

Cluster	Catawba	SC
Agriculture, Food and Natural Resource	3.4	3.3
Architecture and Construction	5.0	4.4
Arts, Audio/Video Technology and Communications	18.0	15.1
Business, Management and Administration	5.3	6.4
Education and Training	6.7	6.0
Finance	1.1	1.0
Government and Public Administration	2.0	3.3
Health Science	20.5	22.0
Hospitality and Tourism	3.0	2.8
Human Service	6.2	6.4
Information Technology	3.5	3.1
Law, Public Safety, Corrections and Security	8.3	7.7
Manufacturing	1.3	2.0
Marketing, Sales and Service	1.5	1.2
Science, Technology, Engineering and Mathematics	9.5	11.6
Transportation, Distribution, and Logistics	4.8	3.8

Source: SC Department of Education

DEGREES AWARDED

In higher education, Catawba area colleges and universities have conferred a wide variety of awards. Of the top 20, Business Administration and Management is the most popular followed by Liberal Arts and Science/Liberal Studies. The institutions included in this data are USC-Lancaster, Winthrop University, and York Technical College.

Figure 20: Top 20 Majors in Catawba - 2011

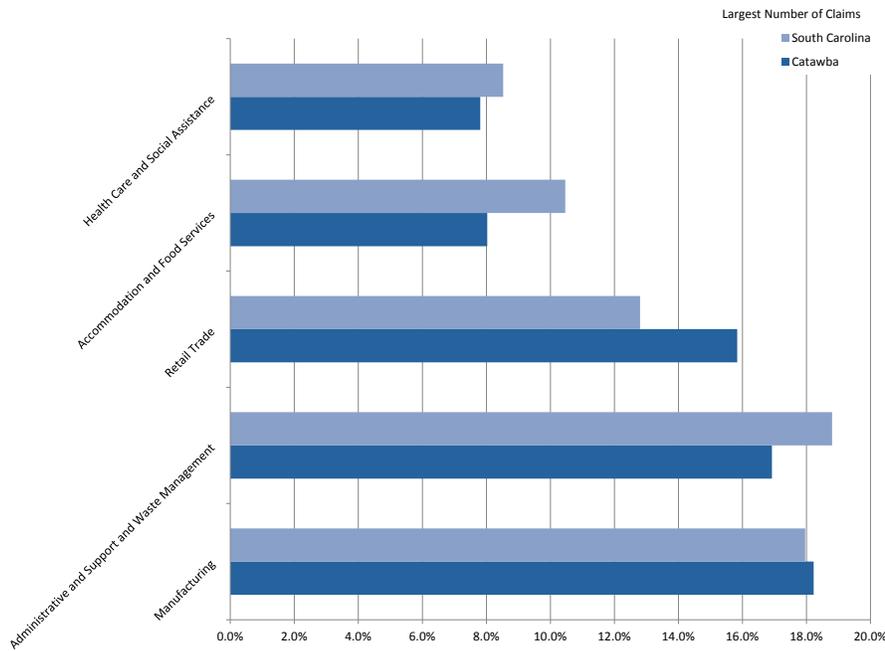
Majors	
Business Administration and Management, General	356
Liberal Arts and Sciences/Liberal Studies	159
Administrative Assistant and Secretarial Science	95
Heat, Air Cond, Ventilation & Refrig Maint Technology	76
Medical/Clinical Assistant	71
Social Work	68
Art/Art Studies, General	65
Psychology, General	64
Early Childhood Education and Teaching	61
Accounting	58
Biology/Biological Sciences, General	48
Automobile/Automotive Mechanics Technology	44
Curriculum and Instruction	44
History, General	44
Registered Nursing/Registered Nurse	43
English Language and Literature, General	41
Industrial Electronics Technology/Technician	40
Business/Commerce, General	40
Multi-/Interdisciplinary Studies, Other	38
Human Nutrition	36

Source: SC Commission on Higher Education, http://www.che.sc.gov/New_Web/Data&Pubs.htm

CHARACTERISTICS OF UI CLAIMS BY OCCUPATION

Another source of supply for the workforce is people who are receiving unemployment compensation. In the Catawba LWIA area, the highest number of claims are filed are in Manufacturing followed by Administrative and Support and Waste Management. This is in line with the areas industry concentration of manufacturing companies and their support.

Figure 21: Characteristics of UI Claims by Occupation - April 2013



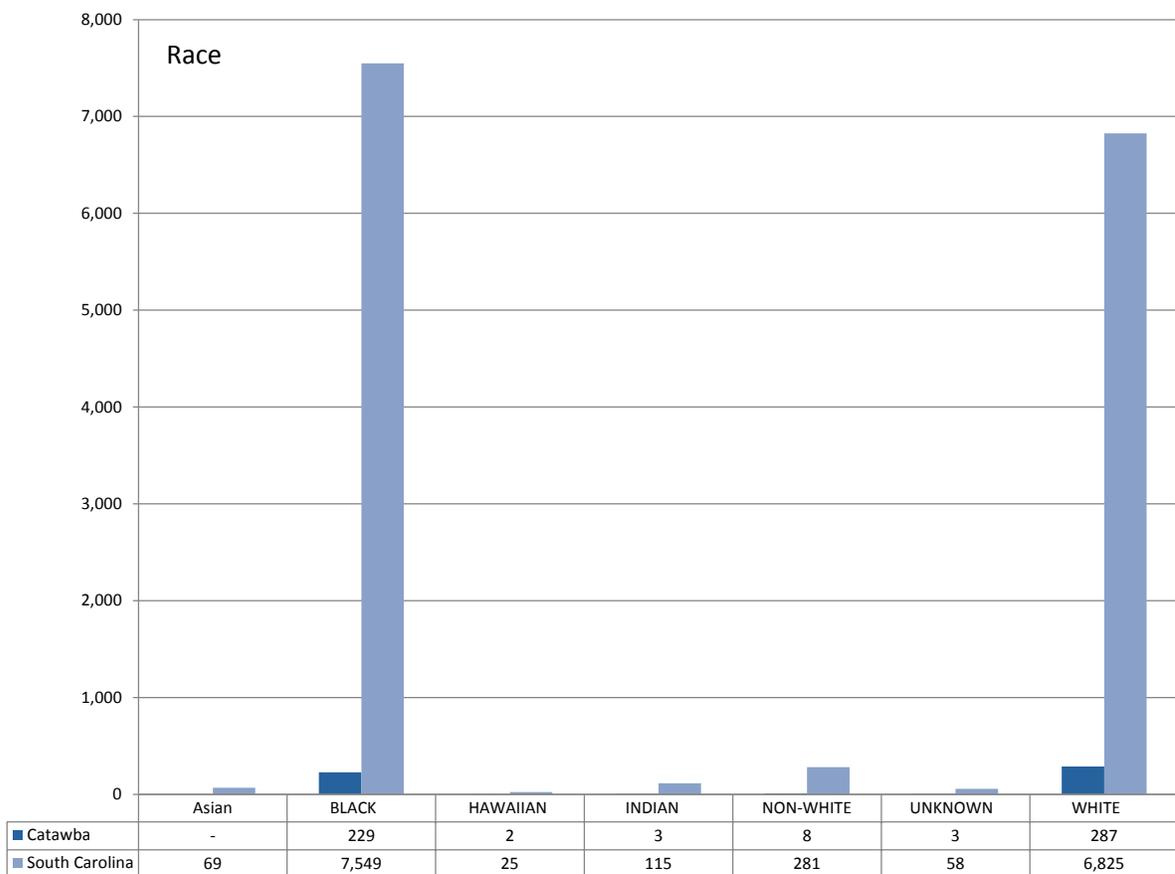
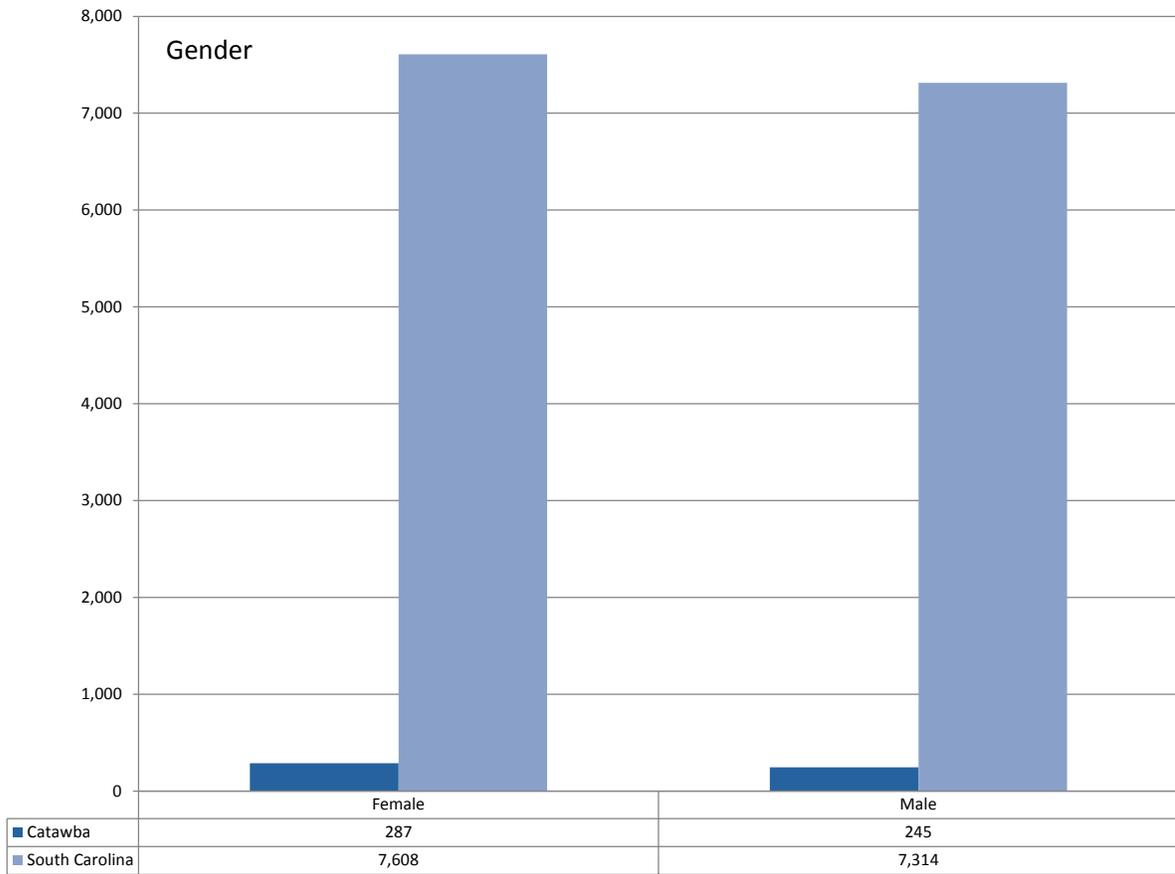
Occupation	Catawba	South Carolina
Manufacturing	84	2,267
Administrative and Support and Waste Management	78	2,373
Retail Trade	73	1,616
Accommodation and Food Services	37	1,321
Health Care and Social Assistance	36	1,076
Construction	29	820
Wholesale Trade	28	445
Professional, Scientific, and Technical Services	23	698
Finance and Insurance	21	300
Other Services (except Public Administration)	13	292
Transportation and Warehousing	12	414
Public Administration	7	206
Real Estate and Rental and Leasing	5	213
Educational Services	5	222
Information	3	122
Arts, Entertainment, and Recreation	3	94
Mining, Quarrying, and Oil and Gas Extraction	2	10
Agriculture, Forestry, Fishing and Hunting	1	98
Management of Companies and Enterprises	1	35

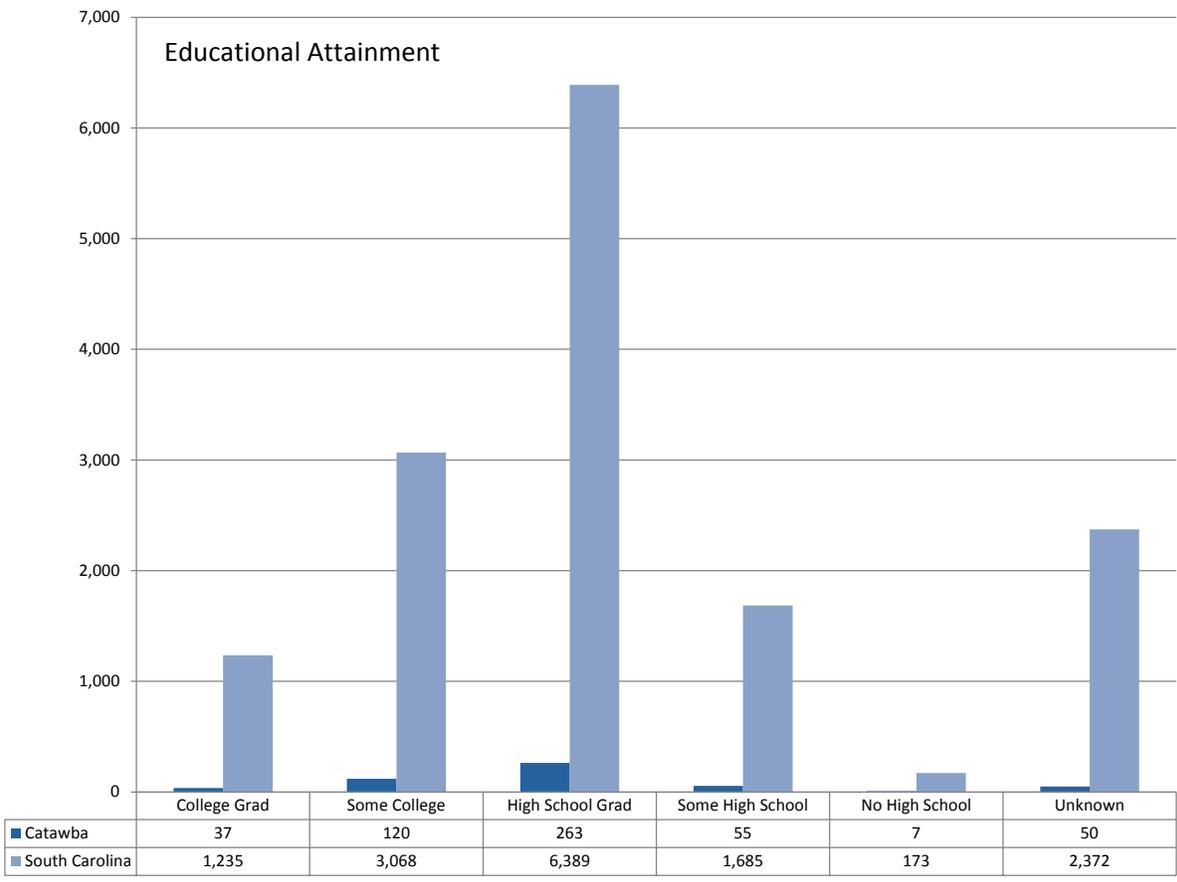
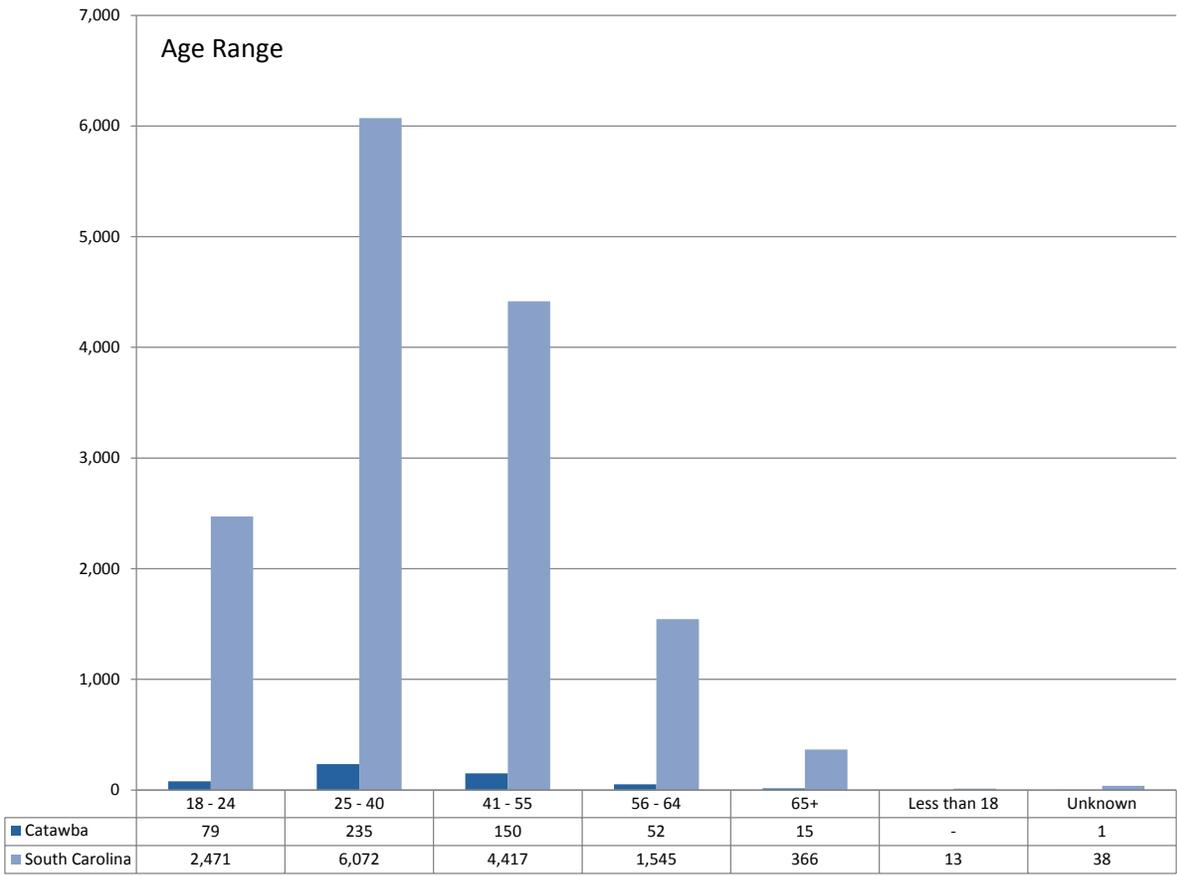
Source: SCDEW

UNEMPLOYMENT INSURANCE CLAIMANT CHARACTERISTICS

The people in this area who were receiving unemployment insurance benefits in April 2013 were typically female, white, 25-40 years old, and were high school graduates or earned a GED.

Figure 22: UI Claimant Characteristics - April 2013





Source: SCDEW

DEMAND: WHAT DO WE NEED?

Workforce demand shows what is needed in an area to support current and future employers. This section examines current (real-time) demand through online job advertisements, industry and occupational projections to 2018, educational requirements for future jobs, and the skills needed for those occupations.

Online job advertisements give a snapshot of what positions need to be filled in an area. The data is from the Conference Board Help Wanted OnLine® Data Series (HWOL) which measures the number of new and reposted job ads from over 16,000 Internet job boards. In April 2013, the largest occupational group with job ads in the Catawba LWIA was Healthcare Practitioners and Technical Occupations followed by Sales and Related Occupations.

ONLINE JOB ADVERTISEMENTS

Figure 23: Catawba HWOL - April 2013 by Major Group

Occupation	# of Job Ads
Healthcare Practitioners and Technical Occupations	504
Sales and Related Occupations	300
Office and Administrative Support Occupations	212
Computer and Mathematical Occupations	159
Management Occupations	132
Food Preparation and Serving Related Occupations	125
Transportation and Material Moving Occupations	125
Business and Financial Operations Occupations	120
Education, Training, and Library Occupations	113
Architecture and Engineering Occupations	108
Healthcare Support Occupations	106
Installation, Maintenance, and Repair Occupations	104
Production Occupations	100
Construction and Extraction Occupations	53
Arts, Design, Entertainment, Sports, and Media Occupations	49
Miscellaneous	48
Protective Service Occupations	36
Personal Care and Service Occupations	32
Community and Social Services Occupations	28
Building and Grounds Cleaning and Maintenance Occupations	25
Life, Physical, and Social Science Occupations	12
Legal Occupations	6
Farming, Fishing, and Forestry Occupations	2

Note: A job advertisement may include multiple openings.

Source: The Conference Board Help Wanted OnLine® Data Series (HWOL)

INDUSTRY PROJECTIONS

The Health Care and Social Assistance industry is projected to have the largest growth from 2008 to 2018, growing by 2,216 jobs or 222 jobs/year. This sector includes services such as ambulatory health care services, hospitals, nursing and residential care facilities, and social assistance services. Educational Services reports the next largest growth with a projected 167 openings/year. This sector includes elementary and secondary schools; junior colleges, universities, business schools, trade schools, and educational support services.

Figure 24: Industry Projections - 2008-2018

Industry	Estimate Employment (2008)	Projected Employment (2018)	Change	Percent Change	Annual Percent Change
Total Employment, All Jobs	111,977	127,295	15,318	13.68	1.29
Health Care and Social Assistance	9,877	12,093	2,216	22.44	2.04
Educational Services	10,454	12,127	1,673	16.00	1.50
Professional, Scientific, and Technical Services	2,784	4,306	1,522	54.67	4.46
Retail Trade	12,124	13,583	1,459	12.03	1.14
Wholesale Trade	4,432	5,789	1,357	30.62	2.71
Administrative and Support and Waste Management and Remediation	6,399	7,503	1,104	17.25	1.60
Accommodation and Food Services	8,574	9,406	832	9.70	0.93
Other Services (Except Government)	4,547	5,244	697	15.33	1.44
Finance and Insurance	6,025	6,652	627	10.41	0.99
Construction	5,263	5,867	604	11.48	1.09
Government	6,716	7,100	384	5.72	0.56
Management of Companies and Enterprises	474	856	382	80.59	6.09
Arts, Entertainment, and Recreation	2,098	2,438	340	16.21	1.51
Information	1,883	2,125	242	12.85	1.22
Real Estate and Rental and Leasing	829	871	42	5.07	0.50
Manufacturing	15,260	14,287	-973	-6.38	-0.66

Source: BLS, SCDEW, QCEW, WI

OCCUPATIONAL PROJECTIONS

A few of the occupations that are projected to have numerous openings between 2008 and 2018 in this area are jobs that have high turnover due to low wages. The need for increased health services (for the aging Baby Boomers) puts healthcare-related jobs near the top of the projections list with four of the top ten projected occupations, including Pharmacy Technicians, Medical Assistants, Dental Hygienists and Assistants. Accountants and Auditors lead the projected employment listing with Taxi Drivers, Coaches, and Compliance Officers included as well.

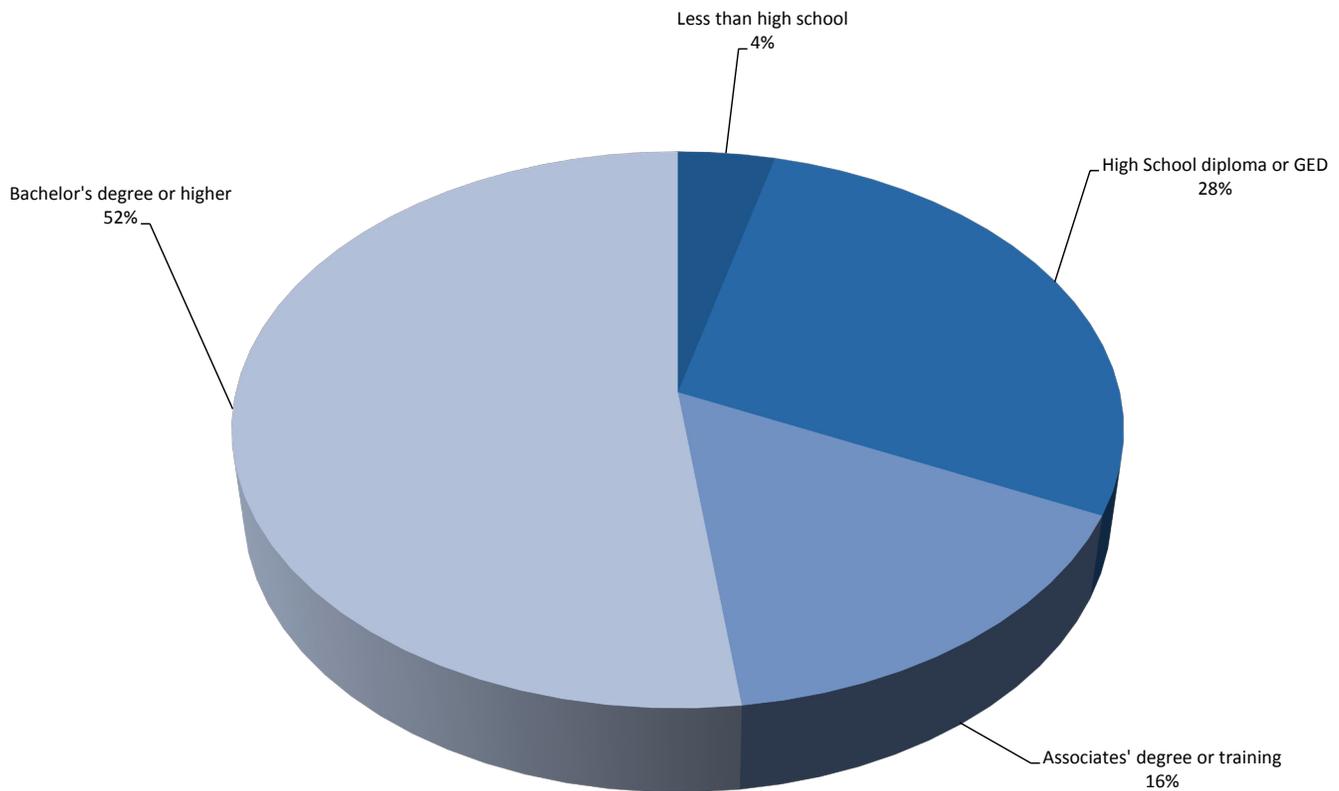
Figure 25: Growing Occupations - 2008-2018

Occupation	Estimated Employment (2008)	Projected Employment (2018)
Accountants and Auditors	1,016	1,344
Management Analysts	305	471
Pharmacy Technicians	324	456
Medical Assistants	228	307
Dental Hygienists	151	208
Dental Assistants	150	206
Taxi Drivers and Chauffeurs	133	171
Coaches and Scouts	129	169
Compliance Officers, Except Agriculture, Construction	119	162
Cost Estimators	112	146
Veterinary Technologists and Technicians	87	140
Construction and Building Inspectors	94	122
Surveyors	75	98
Surveying and Mapping Technicians	69	95
Instructional Coordinators	72	93
Family and General Practitioners	54	70
Veterinarians	33	55
Financial Analysts	26	35
Environmental Engineers	27	35
Physician Assistants	21	31

Source: BLS, SCDEW, OES, WI

Of the top 50 projected growing occupations by percent change, 14 require a high school diploma or GED, two require less than a high school diploma or GED, 26 require a bachelor's degree or more, and eight need an associate's degree or require some kind of postsecondary training. Each of the two requiring less than a high school diploma or GED requires short-term on-the-job training (OJT), which is defined by the US Department of Labor as less than one month.

Figure 26: Education for Top 50 Projected Occupations



Source: BLS, SCDEW, OES, WI

It is just as important to know which occupations are declining in the area. Declines are often due to technological advances (i.e. computers or robots replacing humans), so many of the declining occupations are projected to be manual laborers, as shown in Figure 27.

Figure 27: Top 20 Projected Declining Occupations in Catawba - 2008-2018

Occupation
Coating, Painting, and Spraying Machine Setters
Computer Operators
Computer, Automated Teller & Office Mach. Repairer
Crane and Tower Operators
Electrical and Electronics Repairers
File Clerks
Human Resources Assistants, Except Payroll
Industrial Machinery Mechanics
Inspectors, Testers, Sorters, Samplers & Weighers
Logging Equipment Operators
Maintenance Workers, Machinery
Medical and Clinical Laboratory Technicians
Meter Readers, Utilities
Order Clerks
Postal Service Clerks
Production, Planning, and Expediting Clerks
Sewing Machine Operators
Switchboard Operators, Including Answering Service
Telemarketers
Textile Knitting and Weaving Machine Setters

Source: BLS, SCDEW, OES, WI

SKILLS OF PROJECTED OCCUPATIONS

Using the top 50 projected growing occupations, the skill levels needed for the future workforce based on the definitions given earlier in this report can be categorized.

Figure 28: Skill Levels

Low	3
Middle	21
High	26

Source: BLS, SCDEW, OES, WI

Low-skilled jobs often have commensurate (i.e. low) pay and do not require much education, experience, or OJT. Does the supply of workers have the right skills for the jobs in the future?

WORKFORCE CHALLENGES

The current economic situation in the Catawba LWIA, the supply of workers, and the characteristics of workers who will be in demand has been reviewed. What can be gleaned from these findings? Are there gaps between supply and demand?

Supply Findings

With the population growing steadily until 2030 and a similar population distribution as the state with an even higher percent of 35-49 year olds, this area looks to have a proper mix of workers. In-migration from other states/countries adds a notable number of residents at the top end of the educational spectrum. The LWIA has a higher percent of residents aged 25 and older with some college to bachelor's degree education levels than the state as a whole.

Many high school students selected the Health Science career cluster in keeping with state trends. The next most popular career cluster was Arts, Audio/Video/Technology, and Communications.

Demand Findings

Employer demand was consistent between online advertisements (current) and 2018 projected occupations (long-term needs) in general. Both had the need for workers in Business, Management, and Administration and Marketing, Sales, and Service. Health Science led as a short-term demand, while Hospitality and Tourism was a long-term demand. Most of the top projected occupations require at least a high school diploma or GED.

Figure 29: Comparison of Supply and Demand

	Demand		Supply	
	Top online ads (Short-Term)	Projected Occupations (Long-Term)	Degrees Earned (Short-Term)	Career Clusters Selected (Long-Term)
Agriculture, Food and Natural Resource	1.5	3.2	0.3	3.4
Architecture and Construction	2.7	5.4	4.3	5.0
Arts, Audio/Video Technology and Communications	1.4	1.5	7.9	18.0
Business, Management and Administration	14.7	18.8	22.9	5.3
Education and Training	2.5	9.0	22.0	6.7
Finance	5.8	3.1	0.0	1.1
Government and Public Administration	0.3	0.2	1.0	2.0
Health Science	24.7	6.9	16.2	20.5
Hospitality and Tourism	3.5	10.8	0.0	3.0
Human Service	3.0	6.0	5.9	6.2
Information Technology	6.4	1.6	2.0	3.5
Law, Public Safety, Corrections and Security	1.3	2.1	2.2	8.3
Manufacturing	4.3	7.0	5.1	1.3
Marketing, Sales and Service	13.5	16.8	1.1	1.5
Science, Technology, Engineering and Mathematics	8.6	1.0	7.3	9.5
Transportation, Distribution, and Logistics	5.9	6.7	1.8	4.8

Source: BLS, SCDEW, WI, SC Department of Education, OES, HWOL

A few observations about the comparison that could be considered challenges to the workforce pipeline include:

- There are many post-secondary degrees being earned in Arts Audio/Video Technology and Communications; Business, Management and Administration; and Education and Training for which there is no demand. Possibly the glut in Business graduates could help supply the need for workers in Marketing, Sales and Service.
- There is a short-term demand in Finance; Health Science; Information Technology; Marketing, Sales and Service; and Transportation, Distribution, and Logistics that is not being met by today's area graduates.
- There is an overabundance of Arts, Audio/Video Technology and Communications; Health Science; Law, Public Safety, Corrections and Security; and Science, Technology, Engineering, and Math clusters selected by students that far out pace long-term demand.
- The long-term demand for workers in Business, Management and Administration; Hospitality and Tourism; Manufacturing; and Marketing, Sales and Service is not projected to be met by today's students.

There is always a demand for employees with soft skills. It is said that hard skills (training, degrees, or certification) get you hired, but soft skills get you fired. Many of our residents need to learn or get a refresher in soft skills in order to KEEP their jobs. Employers see the need.

Top 10 Soft Skills Found in Online Ads for South Carolina (April 2013)

1. Oral and written communication skills
2. Customer Service Oriented
3. Problem solving
4. Detail oriented
5. Microsoft Office
6. Self-starting / Self-motivated
7. Organizational skills
8. Troubleshooting
9. Work independently
10. Sales experience

Source: *The Conference Board Help Wanted OnLine*® Data Series (HWOL)

CONCLUSION

The workforce (current and potential) in the Catawba LWIA area faces several challenges that by and large it is able to meet. The population continues to increase steadily, and the education level for the population is higher than the state as a whole with higher percentages of residents with education beyond high school. There are high levels of employers advertising for jobs in business and management; marketing and sales; and health care. However, some supply flows could be fine-tuned to be more in line with demand.

The data shows that:

- There is an undersupply of students choosing Business, Management and Administration; Hospitality and Tourism; Manufacturing; and Marketing, Sales and Service studies to meet the area's future demand.
- There is an oversupply of students choosing Arts, Audio/Video Technology and Communications; Law, Public Safety, Corrections, and Security; STEM; and Health Sciences that will far outpace the future demand in the LWIA.
- Comprehensive soft skills training is needed for all students and job seekers (high school, post-secondary, adult, new and returning entrants to the labor force, and incumbent workers) so that they can not only get hired but hired but retain their positions and thus reduce employee turnover.

Getting education more in line with the demands of employers will help the Catawba LWIA meet the challenges it faces.

GREENVILLE LWIA WORKFORCE REPORT 2012



The *Greenville Workforce Report* is published by the Labor Market Information (LMI) Department of the South Carolina Department of Employment and Workforce. The information and analyses provided in this publication are based on data collected from sources throughout South Carolina and the United States.

About SC DEW and LMI:

The Labor Market Information Department compiles and publishes employment statistics, job forecasts, wage data, demographics, and other labor market information to help public and private organizations, researchers, and others better understand today's complex workforce.

The LMI Department produced this report under the leadership of:

Executive Director - Cheryl Stanton
Interim Deputy Assistant Executive Director - Kerry Paul
Labor Market Information Director - Brenda Lisbon

South Carolina Department of Employment and Workforce
1550 Gadsden Street
Columbia, South Carolina 29201
(803) 737-2660
www.dew.sc.gov
www.scworkforceinfo.com



TABLE OF CONTENTS

EXECUTIVE SUMMARY	VI
INTRODUCTION	VII
ECONOMIC DISCUSSION: A CURRENT PICTURE OF THE WORKFORCE	1
EMPLOYMENT BY INDUSTRY	1
LOCATION QUOTIENT	1
AVERAGE ANNUAL WAGE BY INDUSTRY	2
OCCUPATIONAL EMPLOYMENT	3
SKILLS DATA.....	4
EMPLOYMENT AND UNEMPLOYMENT	6
NEW STARTUP FIRMS	8
EMPLOYERS BY SIZE OF ESTABLISHMENT	9
SUPPLY: WHAT'S OUT THERE?	10
POPULATION BY AGE	10
POPULATION CHANGE AND MIGRATION	11
COMMUTING PATTERNS	12
EDUCATIONAL ATTAINMENT	12
CAREER CLUSTERS SELECTED BY HIGH SCHOOL STUDENTS	13
DEGREES AWARDED	15
CHARACTERISTICS OF UI CLAIMS BY OCCUPATION	16
UNEMPLOYMENT INSURANCE CLAIMANT CHARACTERISTICS.....	17
DEMAND: WHAT DO WE NEED?	20
ONLINE JOB ADVERTISEMENTS.....	20
INDUSTRY PROJECTIONS	20
OCCUPATIONAL PROJECTIONS	21
SKILLS OF PROJECTED OCCUPATIONS	24
WORKFORCE CHALLENGES	25
CONCLUSION	27

TABLE OF FIGURES

FIGURE 1: GREENVILLE LWIA EMPLOYMENT BY INDUSTRY - 3RD QUARTER 2012	1
FIGURE 2: NOTABLE GREENVILLE LWIA LOCATION QUOTIENTS - 2011.....	2
FIGURE 3: ANNUAL AVERAGE WAGE BY INDUSTRY - 3RD QUARTER 2012	3
FIGURE 4: TOP 20 OCCUPATIONS WITH WAGES - 2012.....	4
FIGURE 5: TOP OCCUPATIONS BY SKILL CLASSIFICATION - GREENVILLE 2012	5
FIGURE 6: EMPLOYMENT - 2001-2011	6
FIGURE 7: UNEMPLOYMENT - 2001-2011	7
FIGURE 8: ANNUAL UNEMPLOYMENT - 2001-2011.....	8
FIGURE 9: MONTHLY UNEMPLOYMENT RATE - JANUARY 2011-FEBRUARY 2013.....	8
FIGURE 10: NEW STARTUP FIRMS - 2007-2012.....	9
FIGURE 11: EMPLOYERS BY SIZE OF ESTABLISHMENT - 3RD QUARTER 2012.....	9
FIGURE 12: POPULATION BY AGE.....	10
FIGURE 13: POPULATION PROJECTIONS TO 2030.....	11
FIGURE 14: POPULATION MIGRATION - 2011 - 5-YEAR ESTIMATE.....	11
FIGURE 15: COMMUTING PATTERNS - 2010.....	12
FIGURE 16: EDUCATIONAL ATTAINMENT - GREENVILLE AND SOUTH CAROLINA 2011.....	12
FIGURE 17: EDUCATIONAL ATTAINMENT - GREENVILLE 2011	13
FIGURE 18: PERCENT OF STUDENTS DECLARING A CAREER CLUSTERS IN GREENVILLE AND SC - 2012 ...	14
FIGURE 19: CAREER CLUSTERS - 2012.....	15
FIGURE 20: TOP 20 MAJORS IN GREENVILLE - 2011	16
FIGURE 21: CHARACTERISTICS OF UI CLAIMS BY OCCUPATION - MARCH 2013.....	17
FIGURE 22: UI CLAIMANT CHARACTERISTICS - MARCH 2013.....	18
FIGURE 23: GREENVILLE HWOL - FEBRUARY 2013 BY MAJOR GROUP.....	20
FIGURE 24: INDUSTRY PROJECTIONS - 2008-2018	21
FIGURE 25: GROWING OCCUPATIONS - 2008-2018.....	22
FIGURE 26: EDUCATION FOR TOP 50 PROJECTED OCCUPATIONS	23
FIGURE 27: TOP 20 PROJECTED DECLINING OCCUPATIONS IN GREENVILLE - 2008-2010.....	24
FIGURE 28: SKILL LEVELS.....	24
FIGURE 29: COMPARISON OF SUPPLY AND DEMAND.....	25

EXECUTIVE SUMMARY

“Once the textile capital of the world, Greenville was forced to innovate itself out of a dying industry. With a growing list of over 100 Fortune 500 companies and 200 foreign-based firms calling Greenville home, you can feel the hard-earned momentum.”

From <http://lifeingreenville.com/work/prosperous>

That “hard-earned momentum” is still going in the Greenville area. Current economic conditions include the top employing industry: Administration and Support and Waste Management and Remediation Services. This is the industry that, for the most part, supports manufacturing through its temporary employment agencies subsector. Aging Baby Boomers have added to the strength of the Healthcare and Social Assistance industry, landing it as the second largest industry.

The momentum includes an unemployment rate that is consistently below the state rate, and an overwhelming majority (93 percent) of businesses considered small businesses (up to 49 employees).

So how does the area feed this demand for skilled workers? With a population that is steadily increasing (including in-migration of highly educated people from other states) and a higher rate of citizens with advanced education (some college, bachelor’s degrees, and master’s degrees).

Employers are indicating that they need more workers with backgrounds in business and management, along with marketing and sales. They are always looking for that potential employee that has the soft skills to be an efficient addition to the company.

For the most part, the supply and demand data show that the streams are even, but there are some areas where minor revisions could help better align resources and needs. The area needs more students (high school and post-secondary) to train for jobs in business and in sales. It needs fewer students training in healthcare, education, and social services. It needs higher education to offer more training in marketing and sales. Soft skills are on the wish list for every employer, so they can have a better chance of finding an employee who can be an asset to the company.

The Greenville LWIA is more fortunate than most of the areas in the state with its large manufacturing and manufacturing support sectors, its cluster of worldwide and national headquarters, and its high level of education of the residents. The future looks bright as the economy continues to recover from the recession and both employers and consumers have more confidence in the market.

INTRODUCTION

Greenville is located along Interstate Highway 85, known as the “Boom Corridor” for its rising population and commercial importance. Greenville is located at the midpoint between Atlanta and Charlotte. The Greenville Local Workforce Investment Area (LWIA) is composed entirely of Greenville County.

For the Greenville LWIA and the workforce system, 2012 has been a year of transition and renewed commitment to ensuring that every investment and program strengthens the workforce and economy.

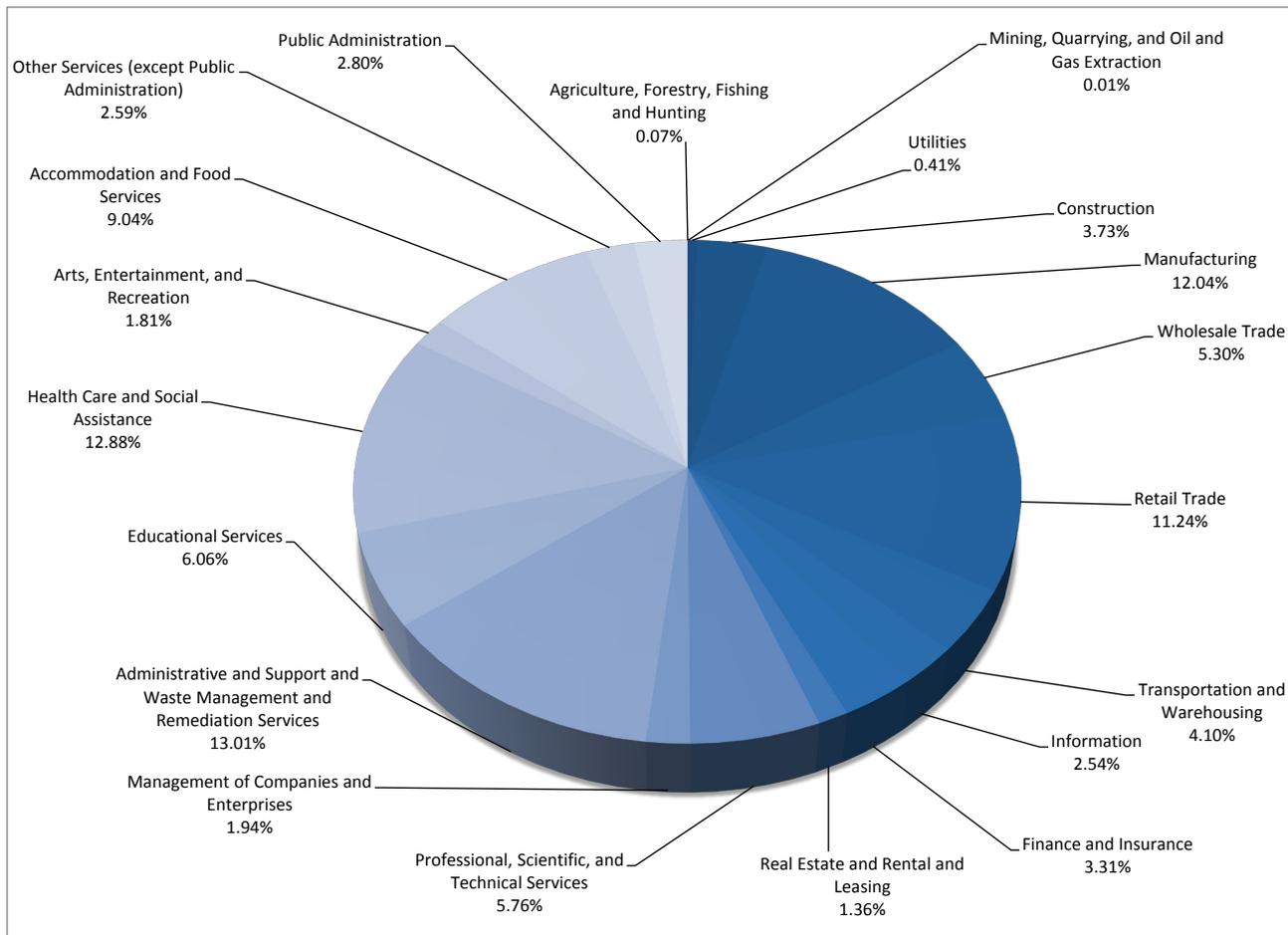
The economic changes this year in the Greenville LWIA demonstrate the shifting needs of employers and employees. Cultivating an understanding of the workforce allows us to respond to anticipated future needs. Analyses help to identify the gap between what the workforce has in the way of talent and skills (supply), and what it may need in the future (demand).

The purpose of the Greenville LWIA Workforce Report is to present a comprehensive view of the status of Greenville County’s economy and workforce. The report includes an analysis of Greenville LWIA’s workforce, industries, economic climate, and factors that will affect all three. Forecasts will be made for the workforce, industries, and the economy.

ECONOMIC DISCUSSION: A CURRENT PICTURE OF THE WORKFORCE

EMPLOYMENT BY INDUSTRY

Figure 1: Greenville LWIA Employment By Industry - 3rd Quarter 2012



Source: US Bureau of Labor Statistics (BLS), SC Department of Employment & Workforce (SCDEW), Quarterly Census of Employment and Wages (QCEW)

Greenville LWIA has a fairly diverse economy. Because of the area's concentration of manufacturing companies (both historically and currently), manufacturing and those that supply it (ex. Administration and Support and Waste Management and Remediation Services) are flourishing. (Note that "Admin./Waste Svcs." includes temporary employment agencies, call centers, janitorial and landscaping companies, and waste disposal.)

As is the case in most areas of the state, the population is getting older and requiring more health care. This plus the Greenville area being attractive to retirees drives employment in the Health Care and Social Assistance sector. The location near the mountains and near such destinations as Asheville, North Carolina and the Blue Ridge Parkway adds to the tourism industry, and this shows in the Accommodation and Food Services sector.

LOCATION QUOTIENT

A location quotient is a useful tool for determining the concentration of workers in a given area. Location quotients compare the regional share of employment in a particular industry to the national share of employment in the same industry. The resulting quotient reveals the degree of regional specialization or concentration in an industry and provides insight into what makes the area unique

in comparison to the national average. A location quotient of 1.0 means the concentration of jobs in that industry matches the nation's value. Location quotients higher than 1.0 indicate the level of specialization the area has in particular sectors. Lower quotients can indicate a possible area that could be expanded.

Figure 2: Notable Greenville LWIA Location Quotients - 2011

Industry	LQ	Industry	LQ
Textile Mills	6.4	Other Information Services	0.4
Textile Product Mills	4.1	Private Households	0.4
Plastics & Rubber Products Manufacturing	3.3	Securities, Commodity Contracts, Investments	0.4
Machinery Manufacturing	3.3	Computer & Electronic Product Manufacturing	0.3
Administrative & Support Services	2.1	Wood Product Manufacturing	0.3
Chemical Manufacturing	2.1	transit & Ground Passenger Transportation	0.2
Telecommunications	2.0	Utilities	0.2
Support Activities for Transportation	1.8	Primary Metal Manufacturing	0.1
Electrical Equipment & Appliance Manufacturing	1.7	Beverage & Tobacco Product Manufacturing	0.1
Truck Transportation	1.6	Air Transportation	0.1

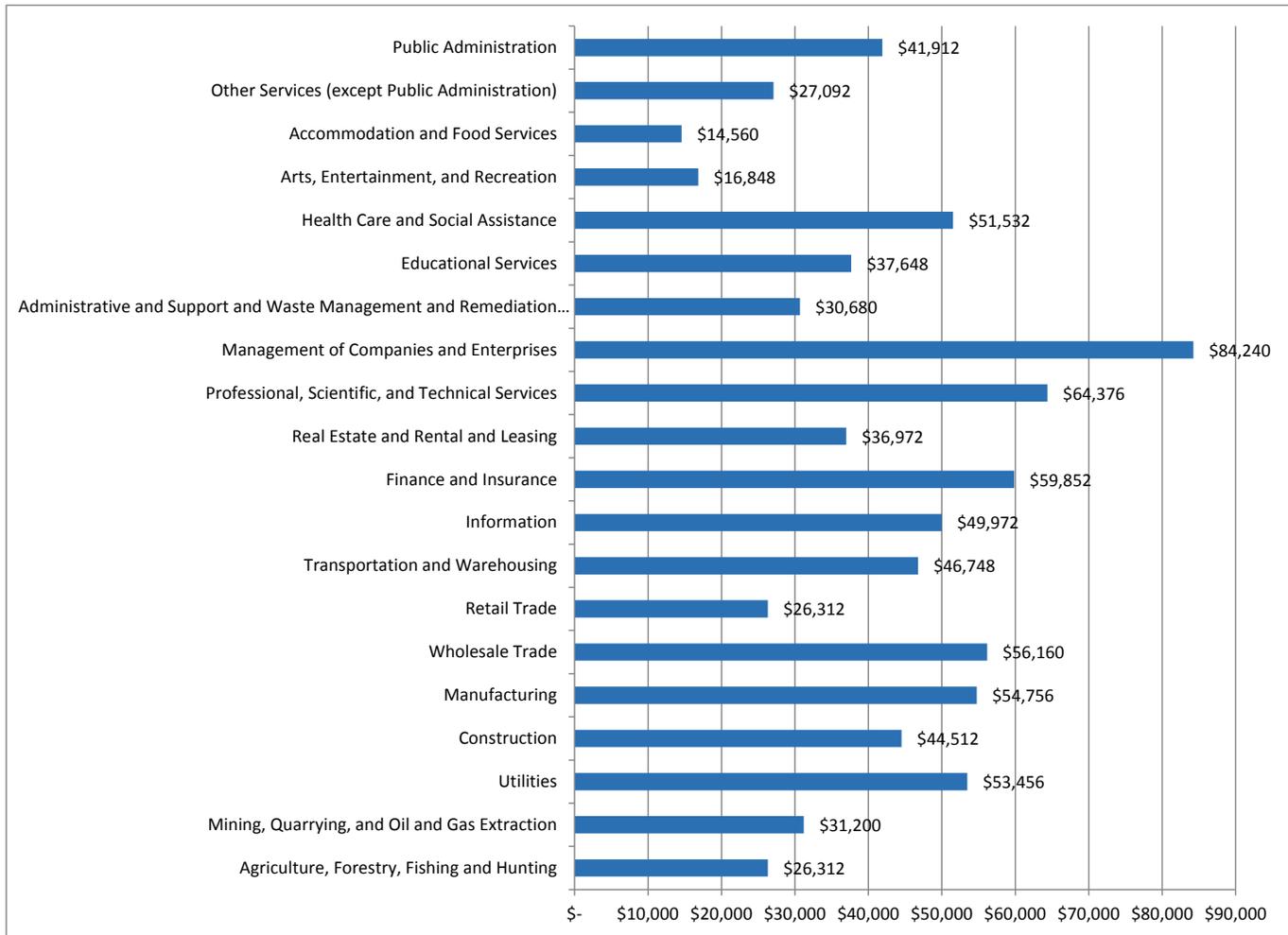
Source: US Department of Labor, Bureau of Labor Statistics - http://data.bls.gov/location_quotient

Not surprisingly, manufacturing is among the most concentrated of industries in this area. With a location quotient of 6.4, Textile Mills stands out as a highly-focused sector. Textile Mill companies transform a basic fiber into a product like yarn or fabric. The second highest location quotient is Textile Product Mills at 4.1. Companies in the Textile Product Mills subsector use the yarn or fabric to make other textile products but not clothes. Other manufacturing sectors are also very concentrated in this area include: Plastics and Rubber, Machinery, Chemical and Electrical Equipment and Appliance.

AVERAGE ANNUAL WAGE BY INDUSTRY

The large number of manufacturing companies in the Greenville LWIA is reflected in the wages, especially for people involved in managing these companies. There are several worldwide head-quarters located in this area, so many high-level managers call Greenville home. The highest annual wage is in Management of Companies, followed by Professional and Technical Services, and Finance and Insurance. Due to the low skill needed for many jobs in the Accommodations and Food Service sector, that industry has the lowest annual wage.

Figure 3: Annual Average Wage by Industry - 3rd Quarter 2012



Source: BLS, SCDEW, QCEW

OCCUPATIONAL EMPLOYMENT

When examining the current occupational employment in the area, one can observe the top 20 occupations are low-skill, low-pay jobs. These jobs, like Cashiers, Waiters and Waitresses, and Janitors, have high turnover. These are not necessarily the most robust jobs as far as wages, but they are jobs.

Figure 4 lists occupations, like Registered Nurses, Sales Representatives, and General Managers, that pay a higher wage. The large manufacturing base in the Greenville LWIA is reflected in this list of top occupations: Team Assemblers, Laborers and Material Movers, General Managers, Sales Representatives, and Maintenance and Repair Workers all found in manufacturing companies.

Figure 4: Top 20 Occupations with Wages - 2012

Occupational Title	Total Employment	Hourly Average Wage (\$)
All Occupations	298,560	19.32
Team Assembler	11,940	13.63
Retail Salespersons	10,020	12.17
Laborers & Freight, Stock, & Material Movers, Hand	7,470	11.37
Cashiers	7,190	8.93
Customer Service Representatives	6,910	15.58
Registered Nurses	6,660	28.66
Janitors & Cleaners, Except Maids & Housekeeping Cleaners	6,330	9.46
Combined Food Preparation & Serving Workers, Including Fast Food	6,170	8.30
Waiters & Waitresses	5,660	8.47
Office Clerks, General	5,570	12.52
General & Operations Managers	4,230	53.63
Secretaries & Admin. Assistants, Except Legal, Medical & Executive	4,230	14.19
Heavy & Tractor-Trailer Truck Drivers	3,970	18.52
Bookkeeping, Accounting, & Auditing Clerks	3,890	16.09
Sales Representatives, Wholesale/Mfg. (Exc. Technical/Scientific Products)	3,780	27.92
Receptionists & Information Clerks	3,700	11.70
Stock Clerks & Order Fillers	3,640	11.90
Nursing Assistants	3,520	10.65
Maintenance & Repair Workers, General	3,250	18.19
First-Line Supervisors of Office & Administrative Support Workers	3,120	22.33

Source: BLS, SCDEW, Occupational Employment Statistics (OES)

SKILLS DATA

Employers are beginning to see that a person's skills, in addition to their education, may help in determining who to hire. Many times the degree is not as important as the skills gained through specialized training and/or experience. In order to be able to determine the current level of skills in the area, the top 50 current occupations by employment are presented, and assigned a low, middle, or high skill designation to that occupation. The definitions for those skills levels are:

- **LOW:** No high school or GED, or high school/GED with less than one year experience and no on-the-job-training (OJT), or short-term OJT
- **MIDDLE:** High school/GED with one year experience, or moderate OJT, or long-term OJT, or apprenticeship, or postsecondary vocational training, or some college, or Associate's Degree, or less than a bachelor's degree
- **HIGH:** Bachelor's degree or higher

In the Greenville area, 25 of the top 50 jobs in 2012 are considered low-skill jobs. Twenty are middle skill, and five are high-skill occupations.

Figure 5: Top Occupations By Skill Classification - Greenville 2012

Skillset: LOW
Billing and Posting Clerks
Cashiers
Combined Food Preparation and Serving Workers, Including Fast Food
Construction Laborers
Cooks, Restaurant
Customer Service Representatives
Dishwashers
Driver/Sales Workers
Food Preparation Workers
Industrial Truck and Tractor Operators
Janitors and Cleaners, Except Maids and Housekeeping Cleaners
Laborers and Freight, Stock, and Material Movers, Hand
Landscaping and Groundskeeping Workers
Light Truck or Delivery Services Drivers
Maids and Housekeeping Cleaners
Office Clerks, General
Packers and Packagers, Hand
Personal Care Aides
Receptionists and Information Clerks
Retail Salespersons
Secretaries and Administrative Assistants, Except Legal, Medical, and Executive
Shipping, Receiving, and Traffic Clerks
Stock Clerks and Order Fillers
Teacher Assistants
Waiters and Waitresses
Skillset: MIDDLE
Automotive Service Technicians and Mechanics
Bookkeeping, Accounting, and Auditing Clerks
Computer User Support Specialists
Executive Secretaries and Executive Administrative Assistants
First-Line Supervisors of Food Preparation and Serving Workers
First-Line Supervisors of Office and Administrative Support Workers
First-Line Supervisors of Production and Operating Workers
First-Line Supervisors of Retail Sales Workers
General and Operations Managers
Heavy and Tractor-Trailer Truck Drivers
Inspectors, Testers, Sorters, Samplers, and Weighers
Licensed Practical and Licensed Vocational Nurses
Machinists
Maintenance and Repair Workers, General
Medical Assistants
Nursing Assistants
Registered Nurses
Sales Representatives, Wholesale and Manufacturing, Except Technical and Scientific Products
Substitute Teachers
Team Assemblers
Skillset: HIGH
Accountants and Auditors
Elementary School Teachers, Except Special Education
Mechanical Engineers
Sales Representatives, Wholesale and Manufacturing, Technical and Scientific Products
Secondary School Teachers, Except Special and Career/Technical Education

Source: BLS, SCDEW, OES, Workforce Intelligence (WI)

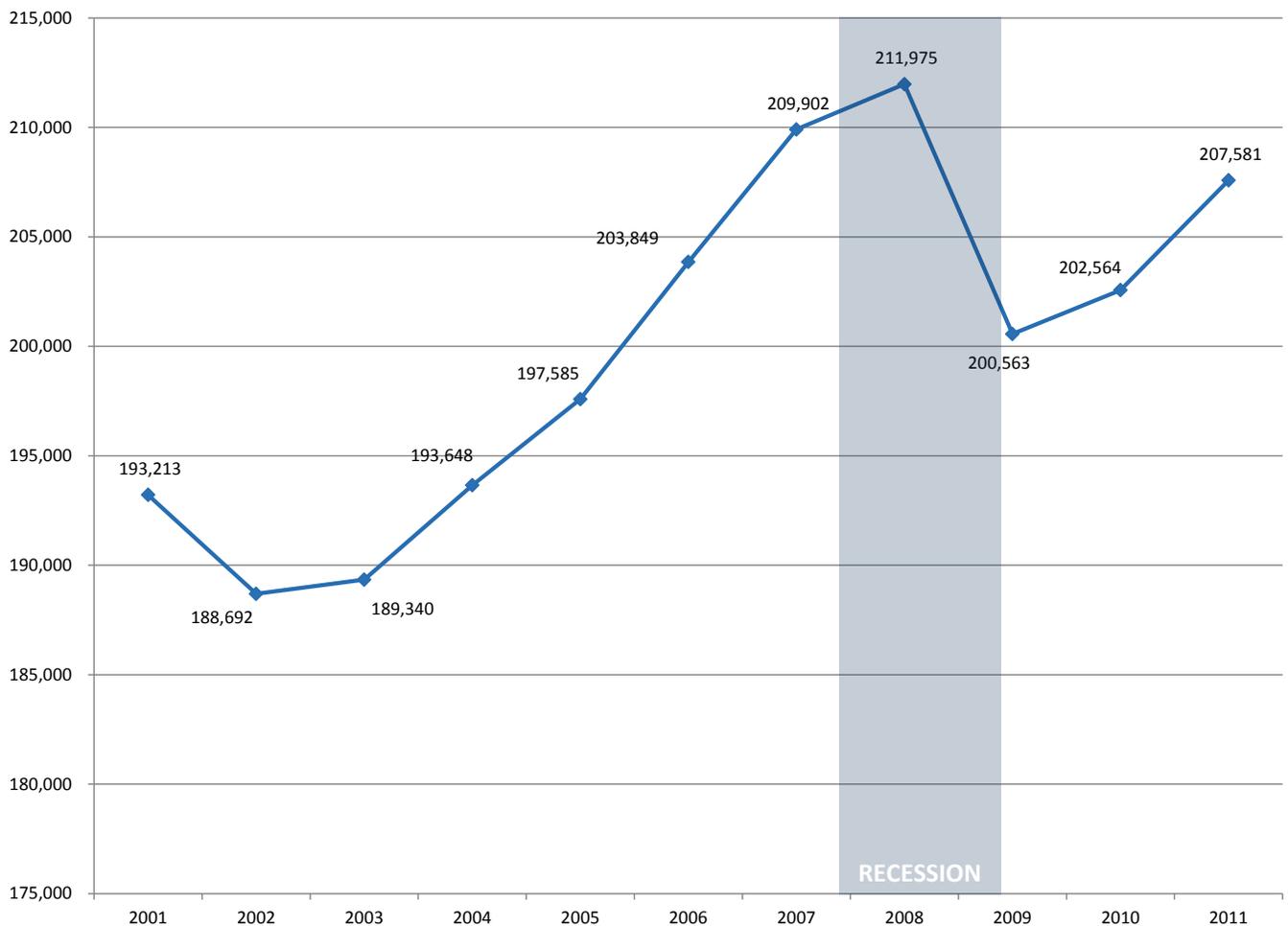
EMPLOYMENT AND UNEMPLOYMENT

A crucial indicator of the health of a workforce is its labor force levels. Labor force data count residents who are employed and unemployed. There are a few Federal definitions that will make discussion of the labor force a little easier to understand.

- Employed: Persons 16 years old or older who worked for pay any time during the week that includes the 12th of the month
- Unemployed: Persons 16 years old or older who are not working but want a job, and are able and willing to work
- Labor Force: Employed plus unemployed
- Unemployment Rate: Unemployment divided by labor force

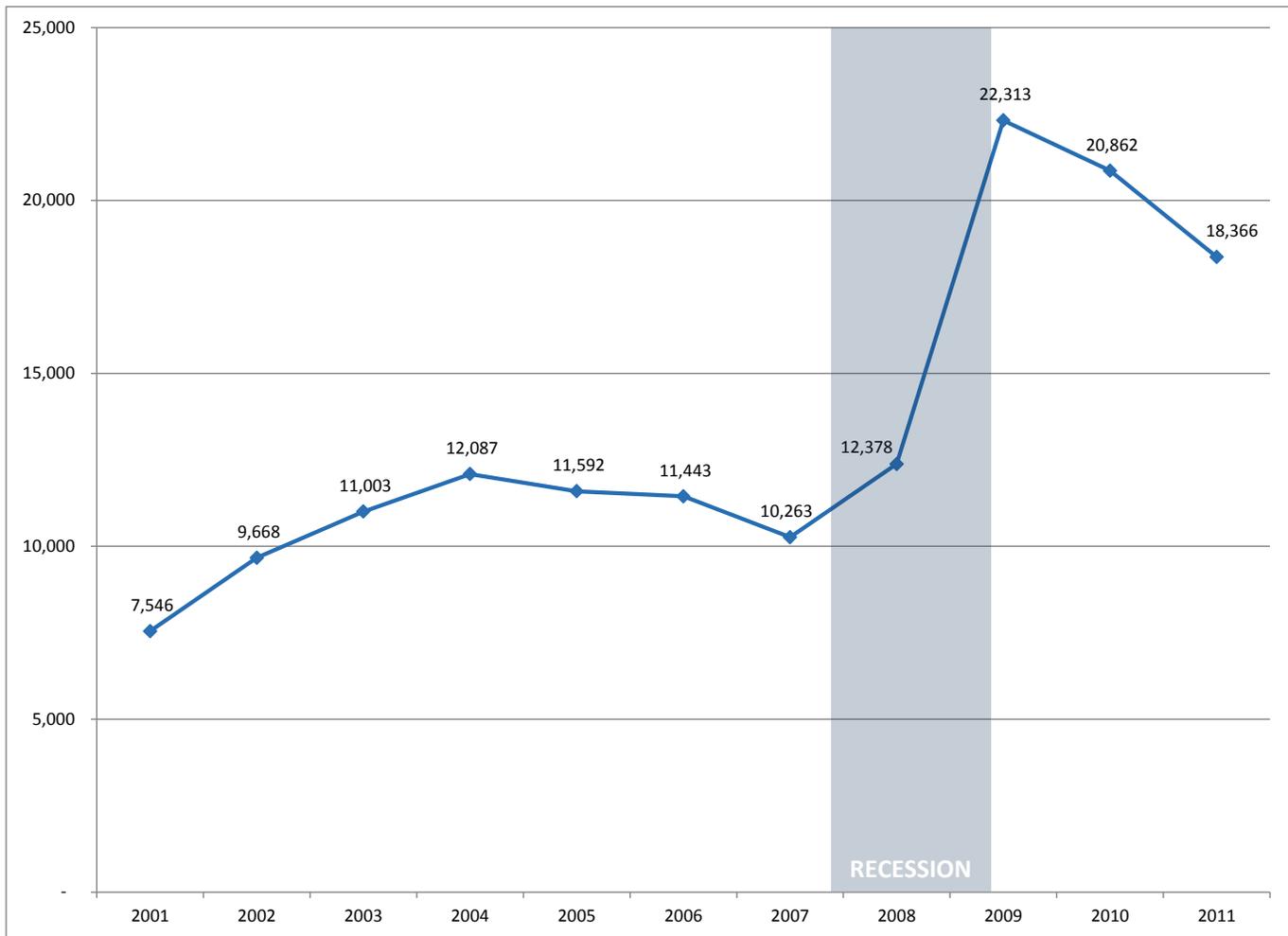
In Figure 6, the recession (officially from December 2007 through June 2009) had a great effect on the labor force. Employment dropped, and unemployment increased by 117 percent.

Figure 6: Employment - 2001-2011



Source: BLS, SCDEW, Local Area Unemployment Statistics (LAUS)

Figure 7: Unemployment - 2001-2011

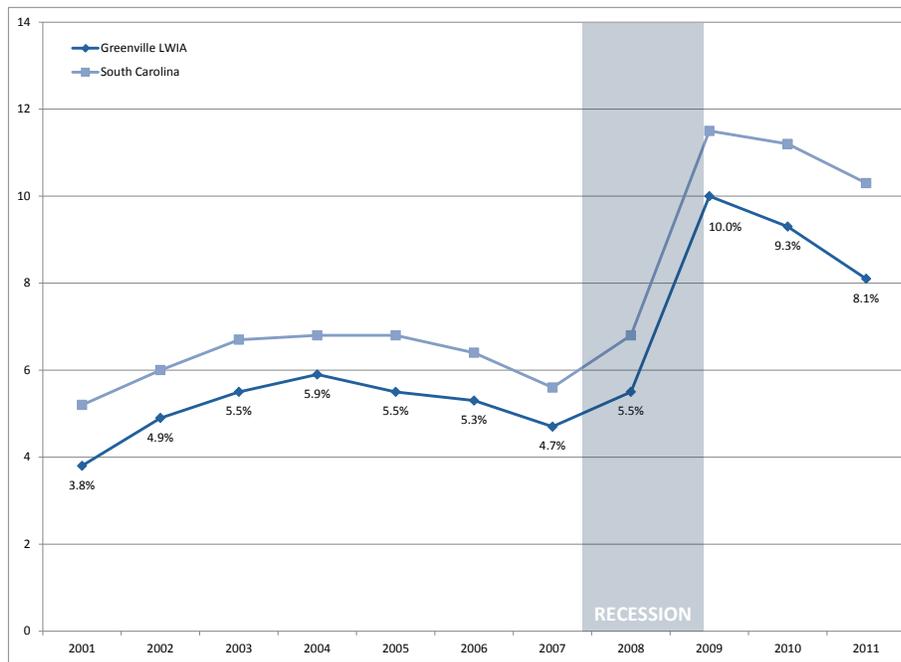


Source: BLS, SCDEW, LAUS

Tracking annual unemployment rates gives a good snapshot of the state of an area's workforce. Annual rates smooth out the usual ups and downs of a month-to-month rate (due to normal seasonal or cyclical changes) to give a more accurate picture.

Figure 8 shows the annual rates for the Greenville LWIA area and South Carolina. From 2001 Greenville has been consistently below the state's rate. During the recession, the Greenville rate almost doubled from 5.5 percent in 2008 to 10.0 percent in 2009.

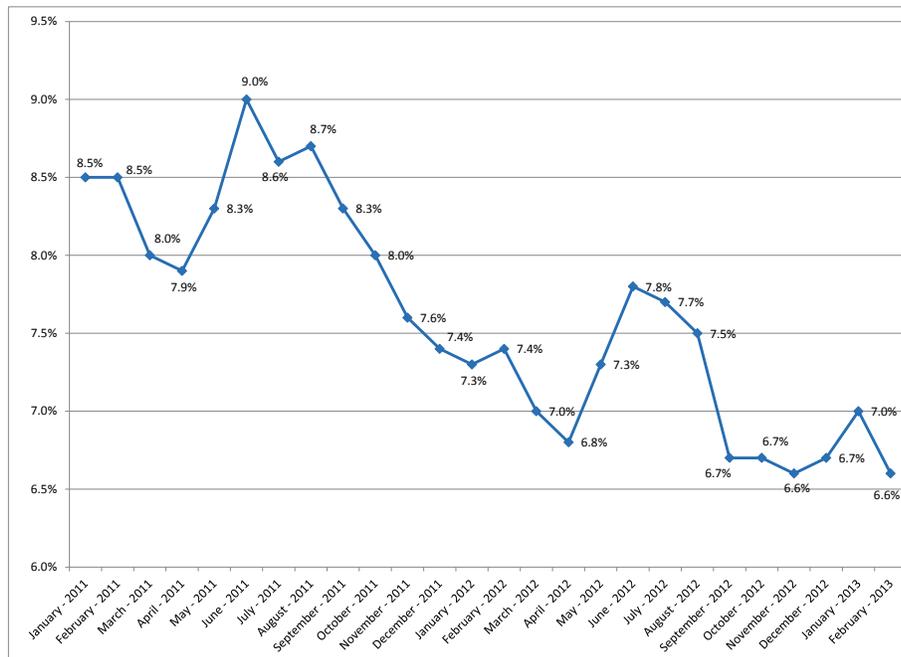
Figure 8: Annual Unemployment - 2001-2011



Source: BLS, SCDEW, LAUS

Figure 9 illustrates the monthly unemployment rate with its wide fluctuations since January 2011. Considering the slow recovery from the recession, the area seems to be steadily recovering.

Figure 9: Monthly Unemployment Rate - January 2011-February 2013



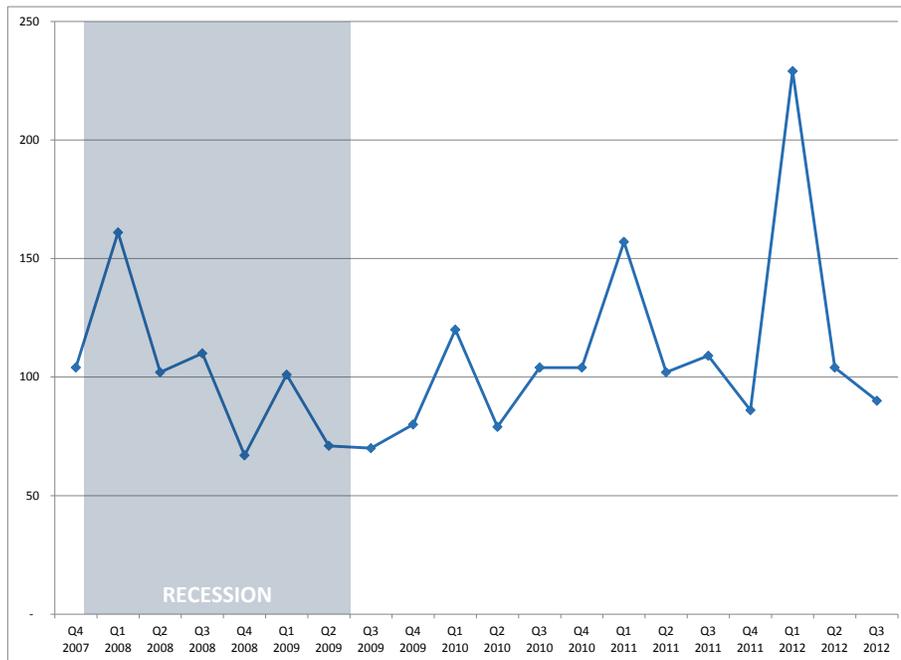
Source: BLS, SCDEW, LAUS

NEW STARTUP FIRMS

One way to see if an economy is improving is to examine data about startup firms. An increase in new companies might be an indicator of expansion in the area, whereas a drop in new firms shows a lack of confidence in the future. (Note: There is almost always a spike in startups in the first quarter

of the year.) Again, the recession had a major impact on normal business births and deaths. Start-ups have been steadily increasing in the area with a large increase in early 2012.

Figure 10: New Startup Firms - 2007-2012



Source: BLS, SCDEW, QCEW

EMPLOYERS BY SIZE OF ESTABLISHMENT

By far, the largest category of business size in the area is small business. Small businesses (or establishments) are defined in South Carolina as companies employing 49 or fewer people. The Greenville LWIA and South Carolina as a whole have 93 percent of establishments designated as small businesses.

Small businesses may need more support and assistance than larger companies because they may not have a designated human resources department or person. They may rely on other resources, such as SC Works Centers, for help with hiring, training, or screening job candidates.

Figure 11: Employers by Size of Establishment - 3rd Quarter 2012

Employees	Greenville	South Carolina
0 to 4	6,323	63,766
5 to 9	2,222	19,667
10 to 19	1,548	13,316
20 to 49	1,186	9,881
50 to 99	479	3,907
100 to 249	283	2,433
250 to 499	62	757
500 to 999	20	328
1000 +	18	264

Source: BLS, SCDEW, QCEW

SUPPLY: WHAT'S OUT THERE?

A manufacturing assembly line needs to have resources and supplies on-hand so that the line does not have to stop. The same is true for the workforce. The supply of workers needs to be of the right quantity and quality to do the job. Is the supply of workers in line with what the companies in the Greenville LWIA need? Seven streams of workforce supply provide an indication: population, commuting, education of the population, clusters of high school students, awards earned at higher education institutions, and characteristics of unemployment insurance claims and claimants.

POPULATION BY AGE

Age distribution in the area is similar to the state. The largest difference is in the prime working 25-49 age cohort, where Greenville has a notably higher proportion and a lower proportion of 60-79 year olds.

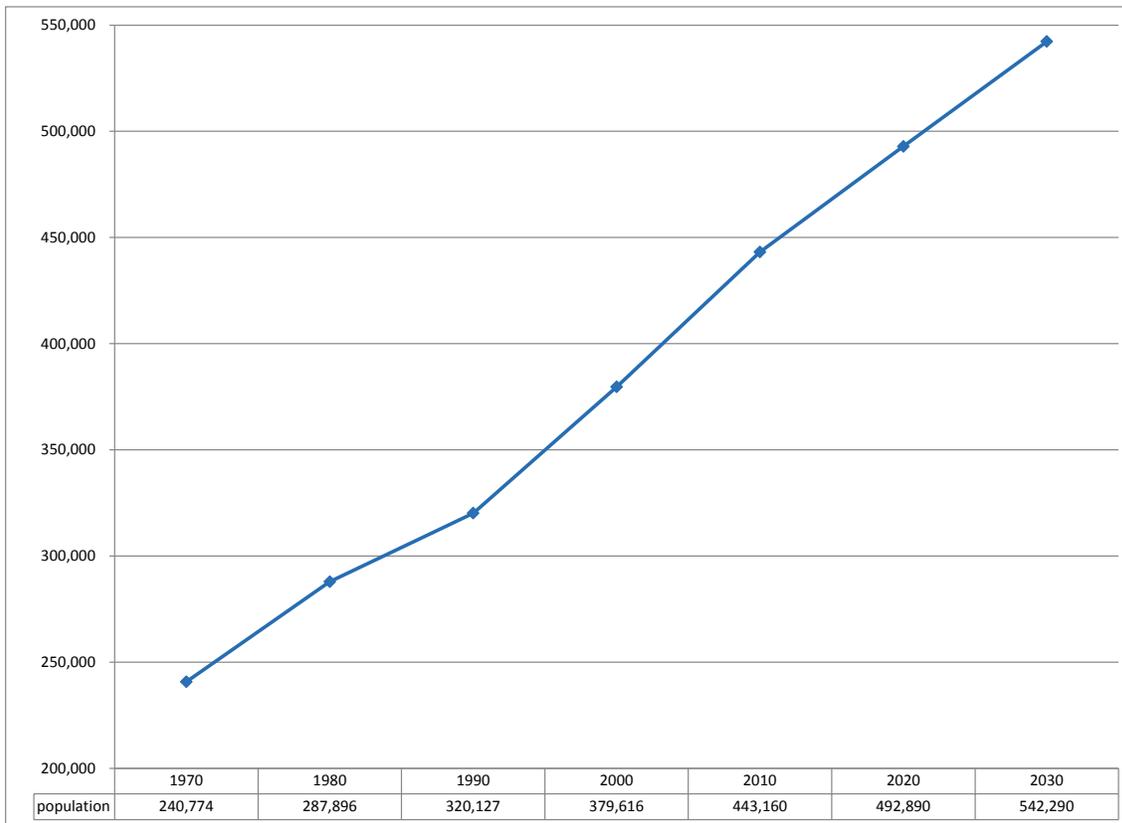
Figure 12: Population by Age

Age Range	Greenville	SC	US
0-4	6.9%	6.5%	6.6%
5-9	6.6%	6.4%	6.6%
10-14	6.7%	6.5%	6.7%
15-19	6.9%	7.2%	7.2%
20-24	6.6%	7.2%	7.0%
25-29	6.8%	6.6%	6.8%
30-34	6.7%	6.2%	6.4%
35-39	7.1%	6.5%	6.6%
40-44	7.2%	6.8%	7.0%
45-49	7.4%	7.2%	7.4%
50-54	7.0%	7.0%	7.2%
55-59	6.4%	6.5%	6.3%
60-64	5.2%	5.9%	5.3%
65-69	4.2%	4.5%	3.9%
70-74	3.0%	3.3%	3.0%
75-79	2.3%	2.5%	2.4%
80-84	1.7%	1.7%	1.9%
85+	1.5%	1.5%	1.7%

Source: US Bureau of Census, American Community Survey (ACS)

POPULATION CHANGE AND MIGRATION

Figure 13: Population Projections to 2030



Source: US Census Bureau, Census 2000, SC Department of Health and Environmental Control - Vital Records Department. Population projections calculated by SC Budget and Control Board, Office of Research and Statistics

Figure 14: Population Migration - 2011 - 5-Year Estimate

	Total	Moved From Different State	Moved From Abroad	Moved From Different County	Moved Within Same County
Population 1 year and over	439,122	3.60%	0.60%	2.90%	10.10%
Hispanic or Latino origin (of any race)	33,674	5.50%	1.50%	1.50%	16.40%
White alone, not Hispanic or Latino	311,364	3.70%	0.40%	2.90%	8.10%
Population 25 Years and Over					
Less than high school graduate	44,174	3.30%	0.80%	3.50%	9.70%
High school graduate/GED	80,175	2.30%	0.20%	1.90%	9.80%
Some college or associate's degree	81,556	3.10%	0.40%	2.50%	9.10%
Bachelor's degree	59,159	3.70%	0.60%	2.10%	6.80%
Graduate or professional degree	30,310	5.00%	1.10%	2.00%	5.00%

Source: US Census Bureau, ACS, SCDEW

After a large jump in population from 2000 to 2010 (up 16.7 percent), the growth of the population of this area slowed down, growing an average of 5.6 percent every five years until 2030. In-migration (people moving into Greenville County) shows while over 17 percent of the population changed residence, just over 4 percent moved from outside of South Carolina. A higher portion of Hispanic residents moved from out of state than Whites did. Over 6 percent of the of the adult population with a graduate degree moved from outside of South Carolina.

COMMUTING PATTERNS

Most of the residents (65 percent) of Greenville County live and work within the county. The tables in Figure 15 show that over 61,000 workers commute into Greenville County. Neighboring Spartanburg County draws a sizeable portion of Greenville County's residents out of the county to work. Over 31,000 more workers commute into Greenville County than leave it to work.

Figure 15: Commuting Patterns - 2010

From Greenville WIA To	29,986	To Greenville WIA From	61,347
Spartanburg County, SC	14,910	Spartanburg County, SC	15,920
Anderson County, SC	3,834	Anderson County, SC	15,561
Pickens County, SC	3,029	Pickens County, SC	13,492
Laurens County, SC	2,241	Laurens County, SC	6,982
		Oconee County, SC	1,232

Source: US Census Bureau, ACS

EDUCATIONAL ATTAINMENT

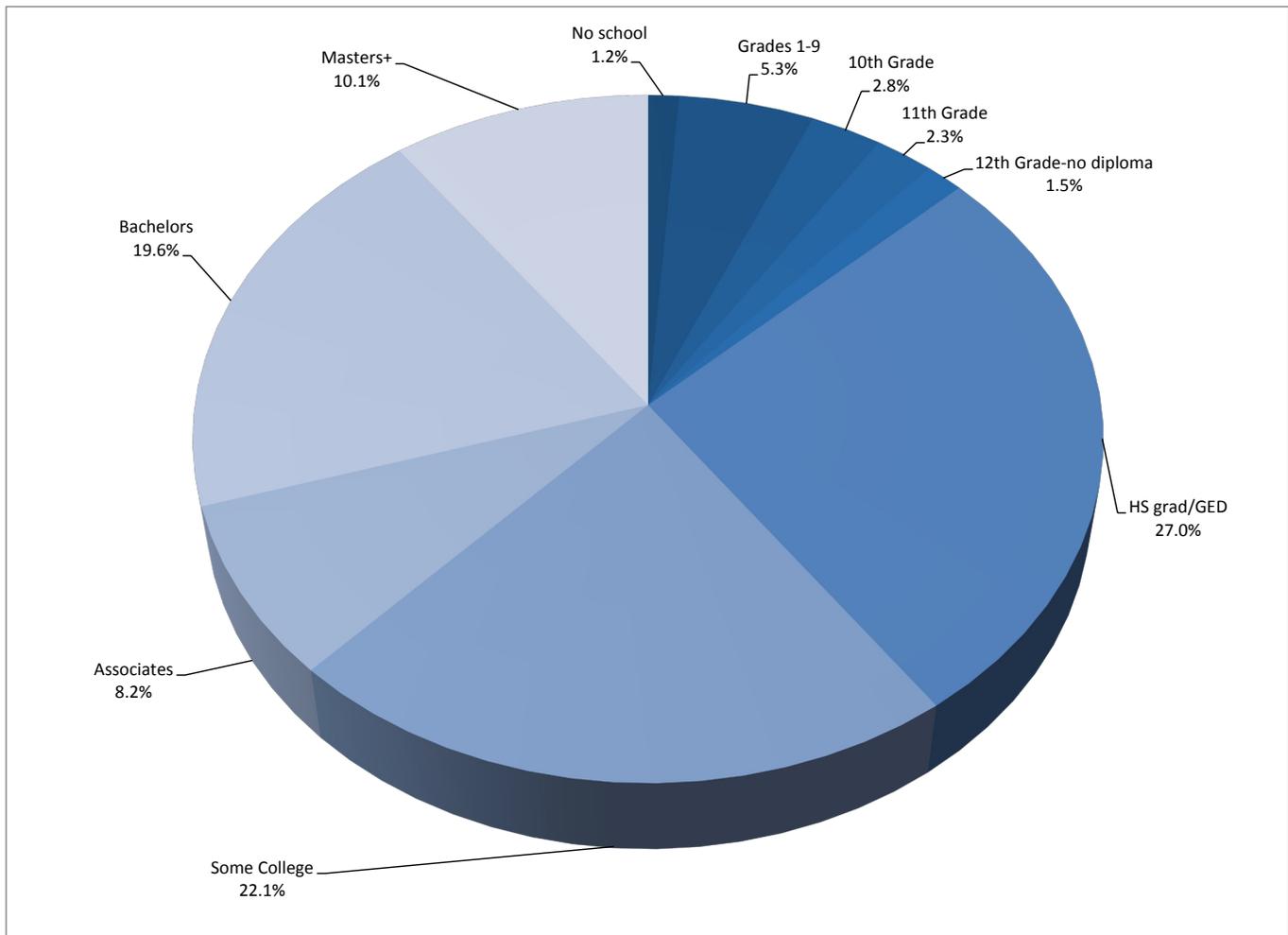
The Greenville LWIA area has more residents with higher-level degrees than the state as a whole. The Greenville LWIA has a nearly 4 percent higher concentration of residents with a bachelor's degree than the state. The area also has a higher concentration of residents with some college and with a master's degree. However, the Greenville LWIA has a lower percent of residents with a high school diploma/GED and with an associate's degree.

Figure 16: Educational Attainment - Greenville and South Carolina 2011

Education Level	Greenville	SC
No school	1.2	1.2
Grades 1-9	5.3	6.8
10th Grade	2.8	3.2
11th Grade	2.3	3.2
12th Grade-no diploma	1.5	1.7
HS grad/GED	27.0	30.5
Some College	22.1	20.7
Associates	8.2	8.5
Bachelors	19.6	15.7
Masters+	10.1	8.6

Source: US Census Bureau, ACS, SCDEW

Figure 17: Educational Attainment - Greenville 2011

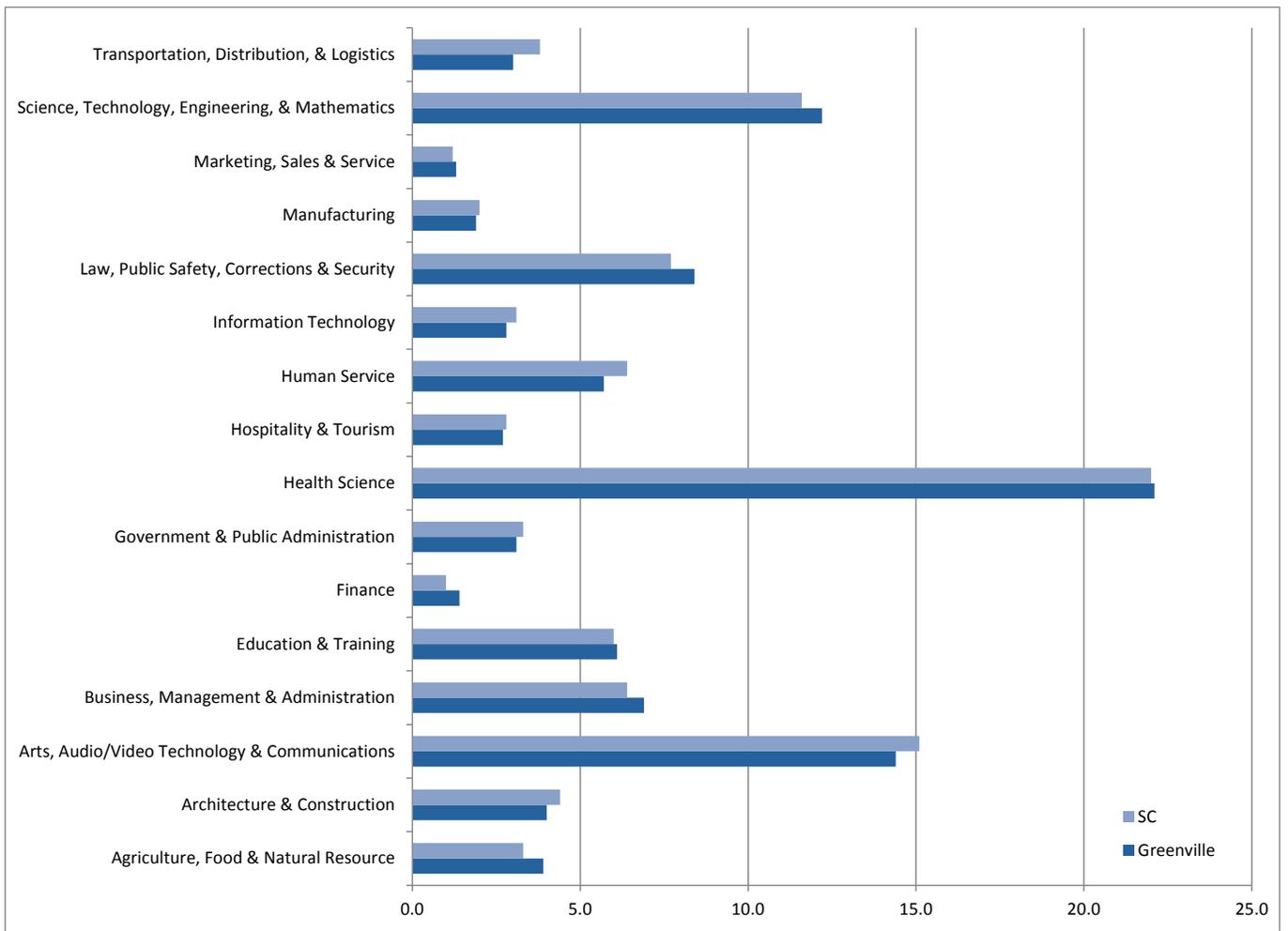


Source: US Census Bureau, ACS, SCDEW

CAREER CLUSTERS SELECTED BY HIGH SCHOOL STUDENTS

Eighth-grade students in South Carolina are required to choose a career cluster to concentrate on to lead them to a post-high school job or college major. There are 16 career clusters.

Figure 18: Percent of Students Declaring a Career Clusters In Greenville and SC - 2012



Note: Declared clusters for students declaring a specific cluster on their primary Electronic Individual Graduation Plan (e-IGP) for 2011-2012 year

Source: SC Department of Education

Many students in the Greenville area have chosen the Health Science career cluster in response to news of a shortage of healthcare workers in South Carolina. In keeping with the state trend, the area’s students also picked the Arts, Audio/Video Technology and Communications cluster and the Science, Technology, Engineering and Math (STEM) cluster.

Figure 19: Career Clusters - 2012

Cluster	Greenville	SC
Agriculture, Food & Natural Resource	3.9	3.3
Architecture & Construction	4.0	4.4
Arts, Audio/Video Technology & Communications	14.4	15.1
Business, Management & Administration	6.9	6.4
Education & Training	6.1	6.0
Finance	1.4	1.0
Government & Public Administration	3.1	3.3
Health Science	22.1	22.0
Hospitality & Tourism	2.7	2.8
Human Service	5.7	6.4
Information Technology	2.8	3.1
Law, Public Safety, Corrections & Security	8.4	7.7
Manufacturing	1.9	2.0
Marketing, Sales & Service	1.3	1.2
Science, Technology, Engineering, & Mathematics	12.2	11.6
Transportation, Distribution, & Logistics	3.0	3.8

Source: SC Department of Education

DEGREES AWARDED

In higher education, Greenville area colleges and universities have conferred a wide variety of awards. Of the top 20, several are related to healthcare. The universities included in this data are Bob Jones University, Furman University, Greenville Technical College, and North Greenville University.

Figure 20: Top 20 Majors in Greenville - 2011

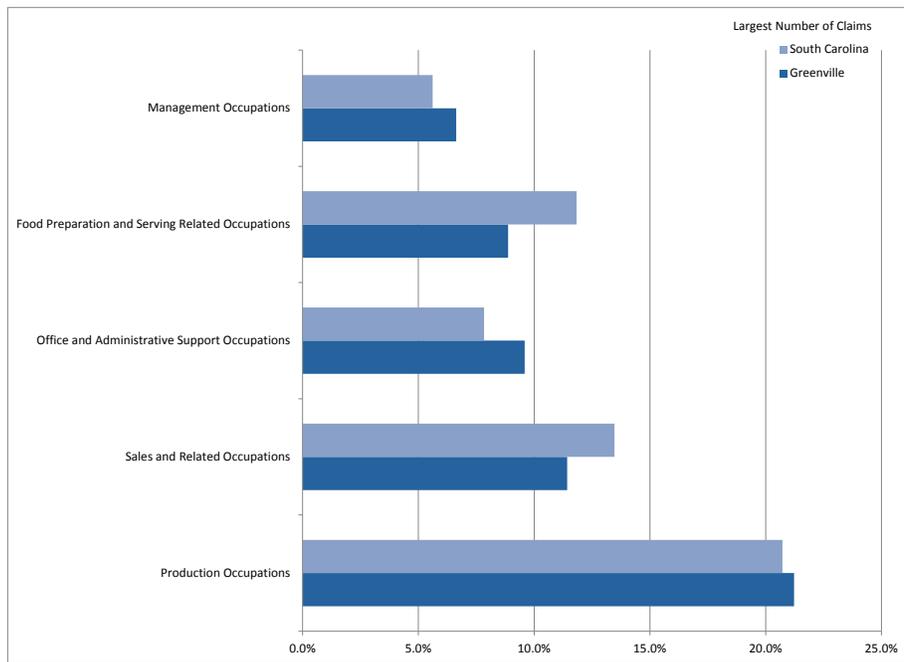
Majors	
Registered Nursing/Registered Nurse	425
Business Administration and Management, General	298
Liberal Arts and Sciences/Liberal Studies	290
Automobile/Automotive Mechanics Technology	189
Truck and Bus Driver/Commercial Vehicle Operator	174
Licensed Practical/Vocational Nurse Training	163
Heat, Air Cond, Ventilation & Refrig Maint Technology	127
Accounting	122
Physical Therapy Technician/Assistant	121
Welding Technology/Welder	99
Data Processing & Data Processing Technology	85
Social Work	85
Biology/Biological Sciences, General	85
Political Science and Government, General	74
Elementary Education and Teaching	73
History, General	70
English Language and Literature, General	64
Sales, Distribution, and Marketing Operations	63
Psychology, General	57
Bible/Biblical Studies	48

Source: SC Commission on Higher Education, http://www.che.sc.gov/New_Web/Data&Pubs.htm

CHARACTERISTICS OF UI CLAIMS BY OCCUPATION

Another source of supply for the workforce is people who are receiving unemployment compensation. In the Greenville LWIA area, most claims filed are in the Manufacturing (or Production) group. This is in line with the areas industry concentration of manufacturing companies.

Figure 21: Characteristics of UI Claims by Occupation - March 2013



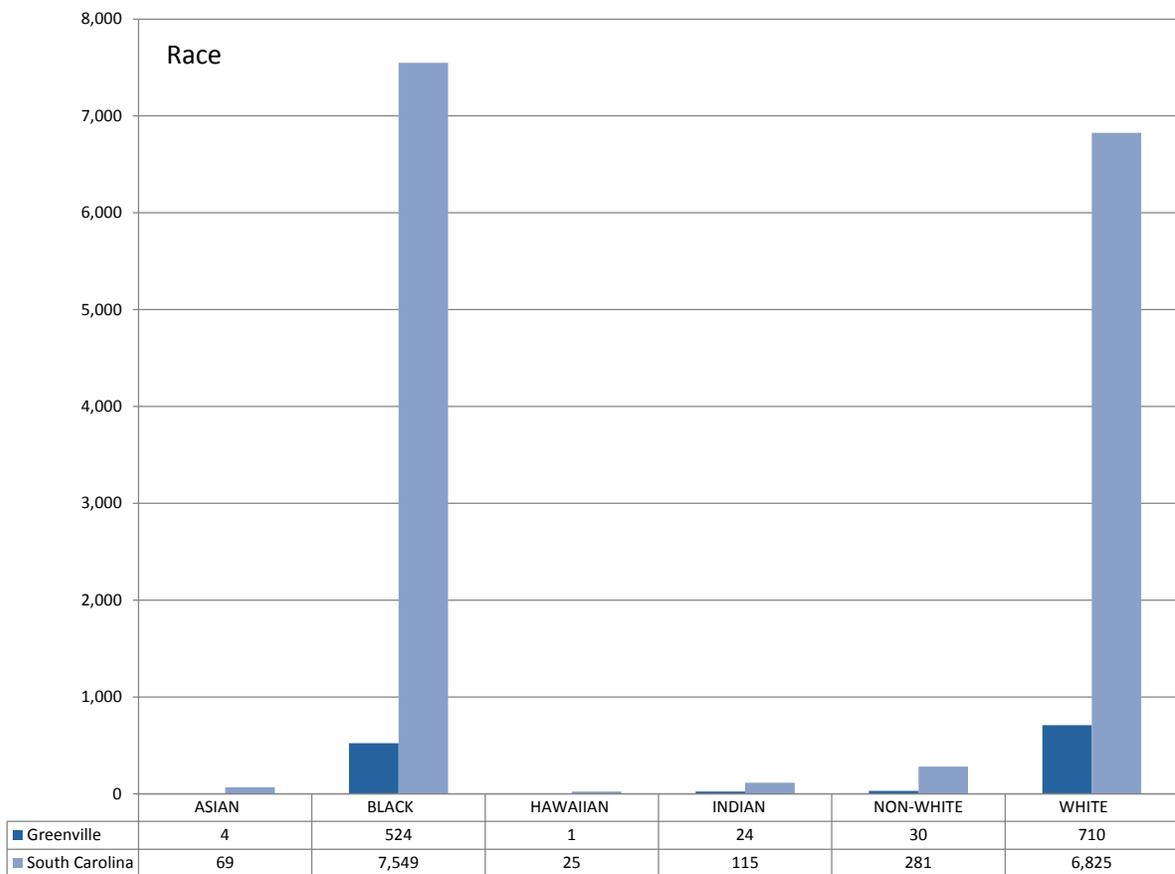
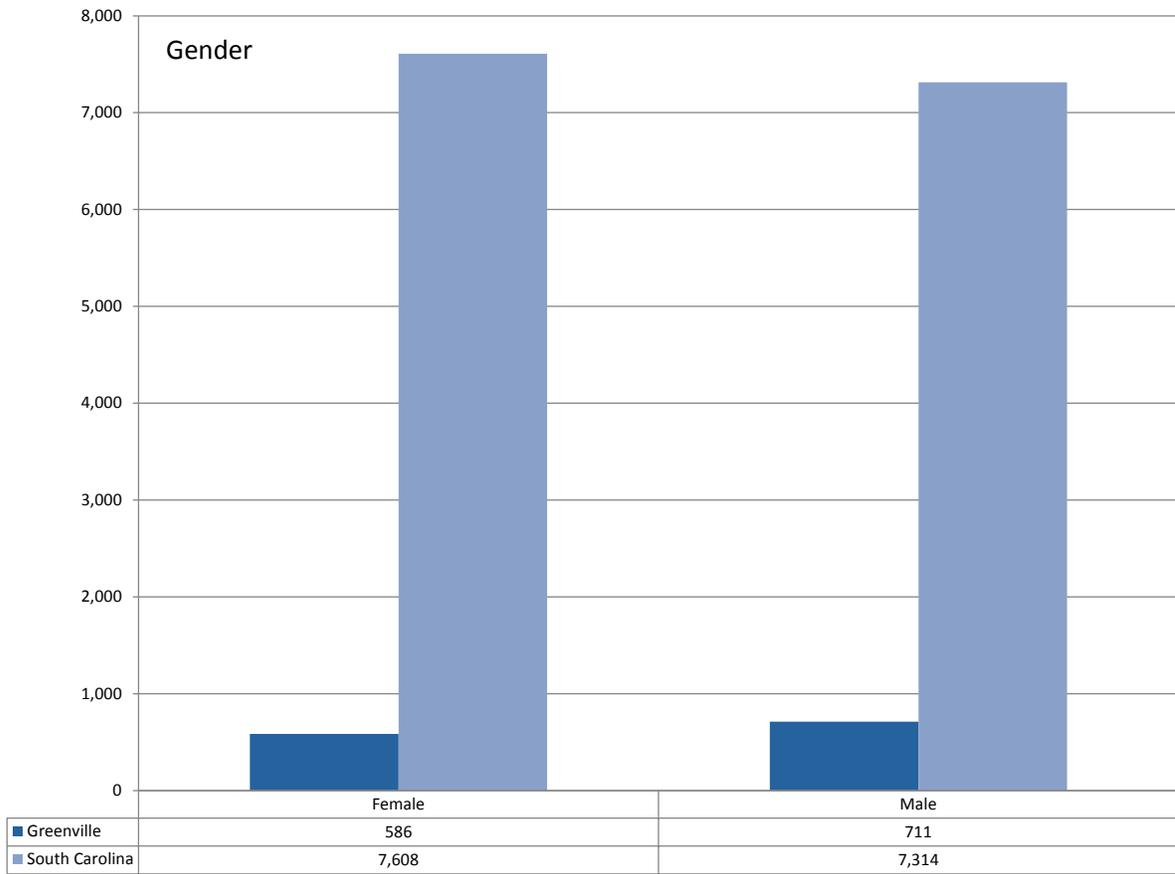
Occupation	Greenville	South Carolina
Administrative and Support and Waste Management	258	2,373
Manufacturing	189	2,267
Retail Trade	179	1,616
Accommodation and Food Services	91	1,321
Health Care and Social Assistance	83	1,076
Professional, Scientific, and Technical Services	77	698
Construction	64	820
Wholesale Trade	51	445
Finance and Insurance	26	300
Transportation and Warehousing	25	414
Real Estate and Rental and Leasing	22	213
Other Services (except Public Administration)	22	292
Educational Services	19	222
Information	12	122
Public Administration	10	206
Arts, Entertainment, and Recreation	9	94
Management of Companies and Enterprises	5	35
Mining, Quarrying, and Oil and Gas Extraction	1	10
Utilities	1	22

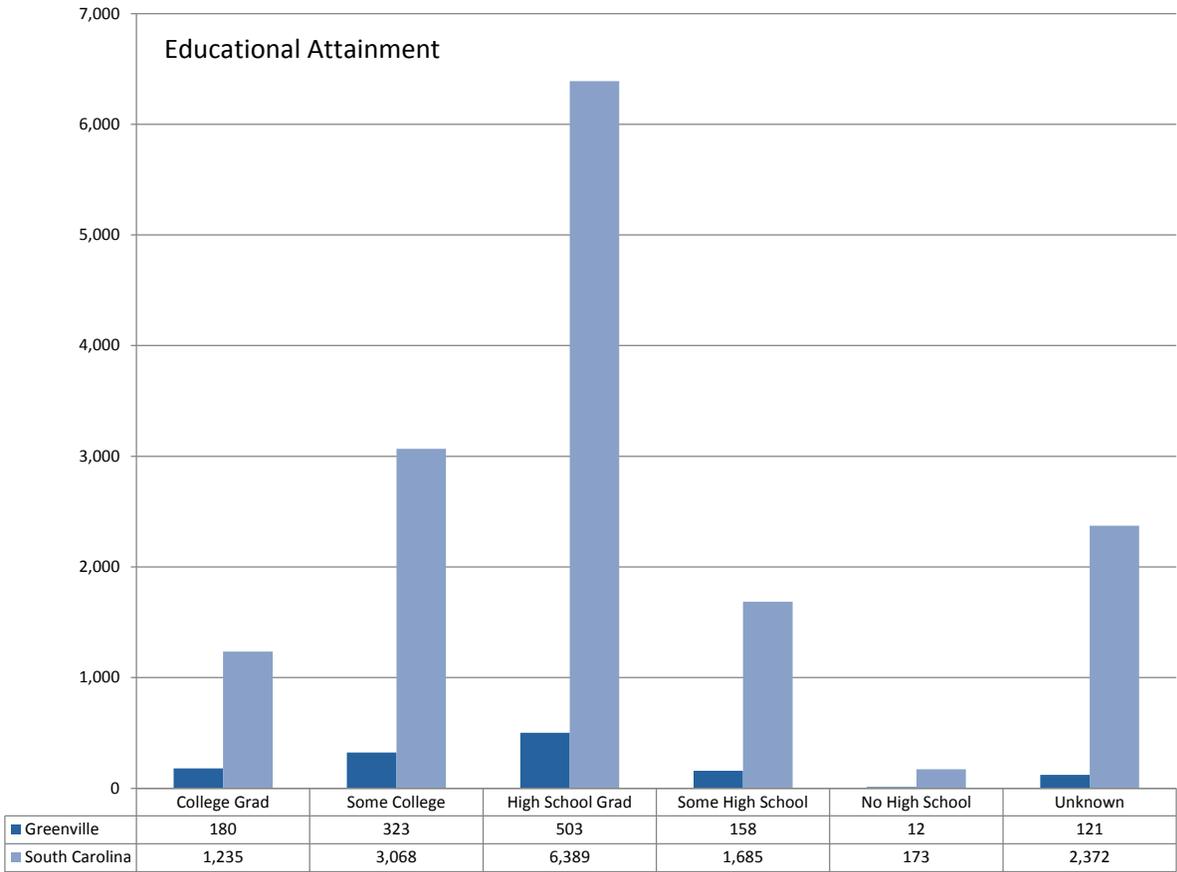
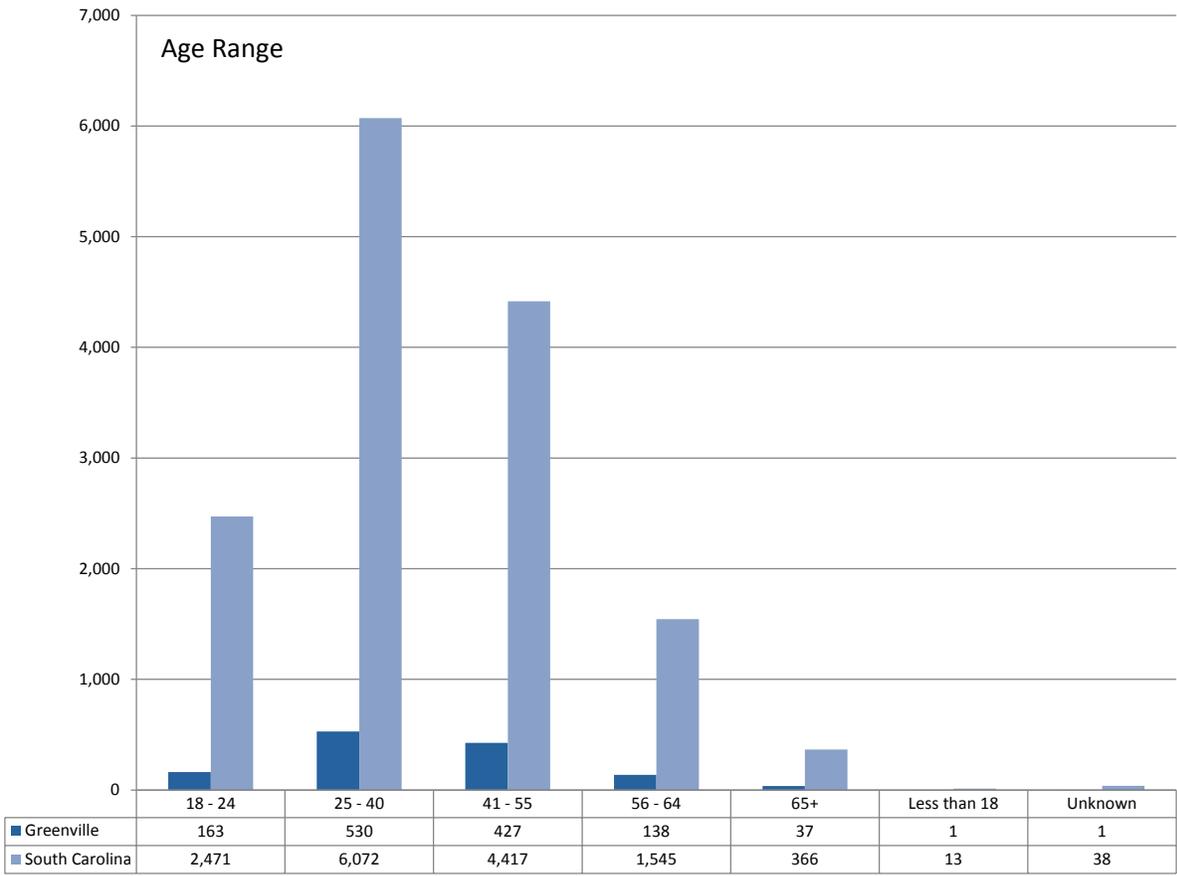
Source: SCDEW

UNEMPLOYMENT INSURANCE CLAIMANT CHARACTERISTICS

The people in this area who were receiving unemployment insurance benefits in March 2013 were typically male, white, 25-40 years old, and were high school graduates or earned a GED.

Figure 22: UI Claimant Characteristics - March 2013





Source: SCDEW

DEMAND: WHAT DO WE NEED?

Workforce demand shows what is needed in an area to support current and future employers. This section examines current (real-time) demand through online job advertisements, industry and occupational projections to 2018, educational requirements for future jobs, and the skills needed for those occupations.

Online job advertisements give a snapshot of what positions need to be filled in an area. The data is from the Conference Board Help Wanted OnLine® Data Series (HWOL) which measures the number of new and reposted job ads from over 16,000 Internet job boards. In February 2013, the largest occupational group with job ads in the Greenville LWIA was Sales and Related followed by Office and Administrative Support and Healthcare Practitioners.

ONLINE JOB ADVERTISEMENTS

Figure 23: Greenville HWOL - February 2013 by Major Group

Occupation	# of Job Ads
Sales & Related Occupations	1,320
Office & Administrative Support Occupations	1,133
Healthcare Practitioners & Technical Occupations	877
Computer & Mathematical Occupations	792
Architecture & Engineering Occupations	721
Management Occupations	659
Transportation & Material Moving Occupations	655
Installation, Maintenance, & Repair Occupations	467
Business & Financial Operations Occupations	466
Production Occupations	421
Food Preparation & Serving Related Occupations	361
Healthcare Support Occupations	268
Construction & Extraction Occupations	237
Building & Grounds Cleaning & Maintenance Occupations	193
Arts, Design, Entertainment, Sports, & Media Occupations	153
Personal Care & Service Occupations	147
Education, Training, & Library Occupations	138
Protective Service Occupations	58
Community & Social Service Occupations	57
Life, Physical, & Social Science Occupations	55
Legal Occupations	45
Farming, Fishing, & Forestry Occupations	3
Military Specific Occupations	1

Note: A job advertisement may include multiple openings.

Source: The Conference Board Help Wanted OnLine® Data Series (HWOL)

INDUSTRY PROJECTIONS

The Administrative and Support and Waste Management and Remediation Services industry is projected to have the largest growth from 2008 to 2018, growing by 5,106 jobs or 511 jobs/year. This sector includes services such as facilities support; employment services; business support; building and dwellings support; and waste collection, treatment, and disposal. Healthcare and Social As-

sistance reports the next largest growth with a projected 489 openings/year. This sector includes hospitals, doctors' and dentists' offices, home health care, nursing care facilities, social assistance, and emergency relief facilities.

Figure 24: Industry Projections - 2008-2018

Industry	Estimate Employment (2008)	Projected Employment (2018)	Change	Percent Change	Annual Percent Change
Total Employment, All Jobs	265,147	288,216	23,069	8.70	0.84
Administrative and Support and Waste Management and Remediation	26,871	31,977	5,106	19.00	1.75
Health Care and Social Assistance	25,676	30,565	4,889	19.04	1.76
Professional, Scientific, and Technical Services	14,105	18,973	4,868	34.51	3.01
Educational Services	15,422	18,132	2,710	17.57	1.63
Accommodation and Food Services	20,439	21,964	1,525	7.46	0.72
Other Services (Except Government)	11,408	12,639	1,231	10.79	1.03
Real Estate and Rental and Leasing	3,986	5,101	1,115	27.97	2.50
Wholesale Trade	11,808	12,675	867	7.34	0.71
Finance and Insurance	8,304	8,999	695	8.37	0.81
Arts, Entertainment, and Recreation	2,981	3,409	428	14.36	1.35
Retail Trade	30,360	30,769	409	1.35	0.13
Transportation and Warehousing	8,891	9,245	354	3.98	0.39
Information	6,037	6,347	310	5.14	0.50
Management of Companies and Enterprises	4,243	4,470	227	5.35	0.52
Government	9,613	9,739	126	1.31	0.13
Construction	13,084	13,096	12	0.09	0.01
Utilities	1,025	873	-152	-14.83	-1.59
Manufacturing	31,442	28,905	-2,537	-8.07	-0.84

Source: BLS, SCDEW, QCEW, WI

OCCUPATIONAL PROJECTIONS

Many of the jobs that are projected to have numerous openings between 2008 and 2018 in this area are jobs that have high turnover due to low wages. Occupations like Food Batchmakers and Personal Care Aides do not require extensive education, therefore the pay is low. The need for increased health services (for the aging Baby Boomers) puts several medical related positions in the list of growing occupations.

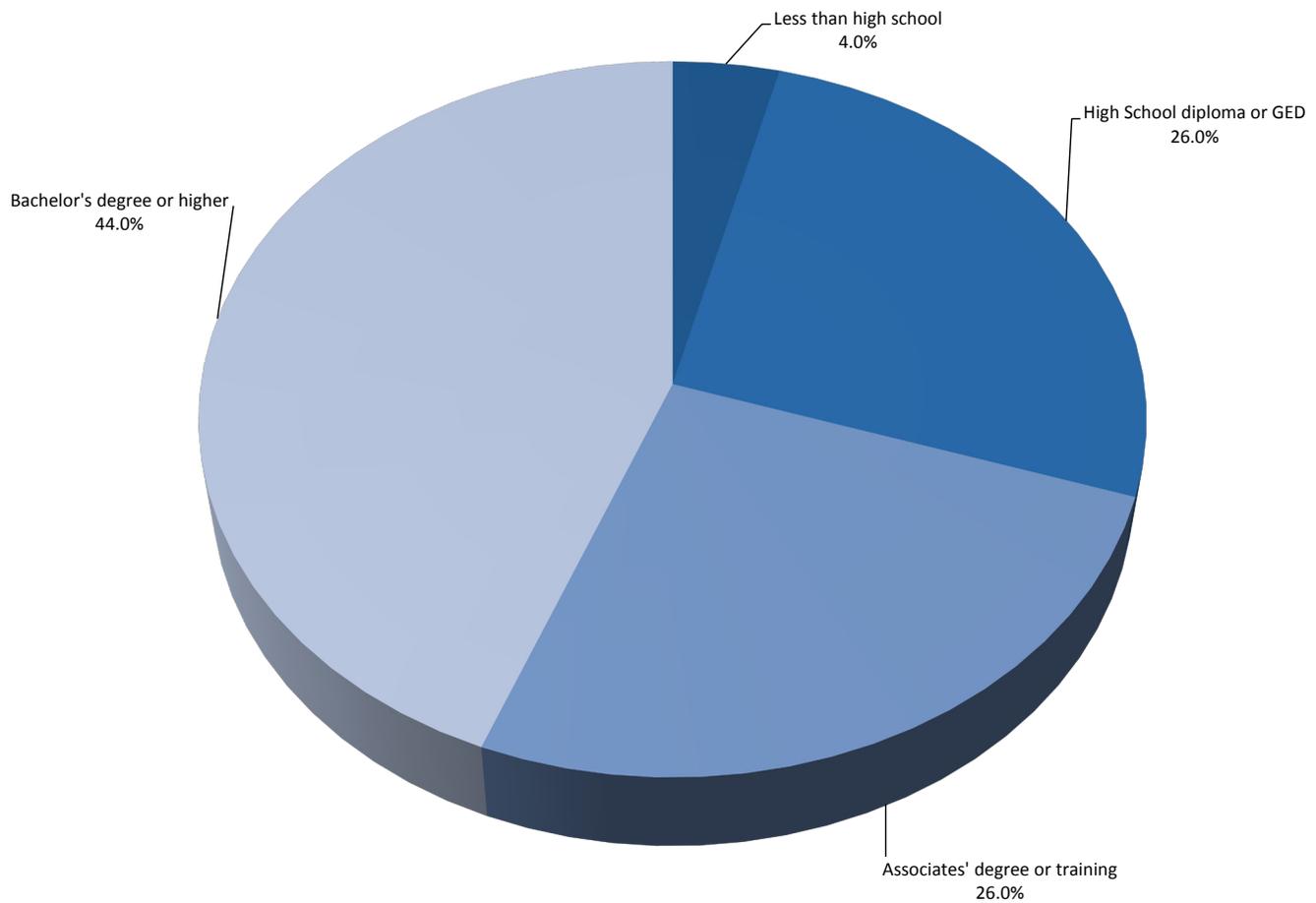
Figure 25: Growing Occupations - 2008-2018

Occupation	Estimated Employment (2008)	Projected Employment (2018)
Personal and Home Care Aides	1,433	2,236
Real Estate Sales Agents	1,001	1,378
Self-Enrichment Education Teachers	590	857
Pharmacy Technicians	648	838
Civil Engineers	604	799
Fitness Trainers and Aerobics Instructors	599	783
Paralegals and Legal Assistants	406	530
Personal Financial Advisors	334	448
Coaches and Scouts	276	351
Bakers	200	273
Veterinary Technologists and Technicians	175	238
Veterinarians	155	203
Financial Analysts	124	162
Food Batchmakers	69	110
Technical Writers	79	110
Medical Equipment Repairers	70	93
Operations Research Analysts	61	84
Athletic Trainers	60	77
Environmental Scientists and Specialists	34	49
Financial Examiners	21	27

Source: BLS, SCDEW, OES, WI

Of the top 50 projected growing occupations by percent change, 13 require a high school diploma or GED, two require less than a high school diploma or GED, 22 require a bachelor's degree or higher, 13 have an associate's degree or require some kind of postsecondary training. Each of the two requiring less than a high school diploma or GED requires short-term on-the-job training (OJT), which is defined by the US Department of Labor as less than one month.

Figure 26: Education for Top 50 Projected Occupations



Source: BLS, SCDEW, OES, WI

It is just as important to know which occupations are declining in the area. Declines are often due to technological advances (i.e. computers or robots replacing humans), so many of the declining occupations are projected to be in textile manufacturing and administration.

Figure 27: Top 20 Projected Declining Occupations in Greenville - 2008-2010

Occupation
Chemical Equipment Operators and Tenders
Chemical Plant and System Operators
Computer Operators
Cutters and Trimmers, Hand
Electrical and Electronic Engineering Technicians
Electrical and Electronic Equipment Assemblers
File Clerks
Grinding, Lapping, Polishing, and Buffing Machine
Insurance Underwriters
Lathe and Turning Machine Tool Setters, Operators, Machine Feeders and Offbearers
Order Clerks
Painters, Construction and Maintenance
Postal Service Clerks
Postal Service Mail Sorters, Processors, and Proce
Roofers
Sewing Machine Operators
Textile Bleaching & Dyeing Machine Op. & Tenders
Textile Cutting Machine Setters, Operators, Tender
Textile Knitting and Weaving Machine Setters, Oper

Source: BLS, SCDEW, OES, WI

SKILLS OF PROJECTED OCCUPATIONS

Using the top 50 projected occupations, the skill levels needed for the future workforce based on the definitions given earlier in this report can be categorized.

Figure 28: Skill Levels

Low	5
Middle	23
High	22

Source: BLS, SCDEW, OES, WI

Low-skilled jobs often have commensurate (i.e. low) pay and do not require much education, experience, or OJT. Does the supply of workers have the right skills for the jobs in the future?

WORKFORCE CHALLENGES

The current economic situation in the Greenville LWIA, the supply of workers, and the characteristics of workers who will be in demand has been reviewed. What can be gleaned from these findings? Are there gaps between supply and demand?

Supply Findings

With the population growing at a steady 5.6 percent every five years until 2030 and a larger-than-the-state share of 25-49 year olds, this area looks to have a steady supply of workers. In addition, in-migration from other states/countries adds many residents with a higher education. This is evident in the overall educational attainment of residents 25 years and older: more residents with some college, bachelor's, and master's degrees than the state as a whole. On the other end of the scale, the Greenville LWIA, when compared to the state, has fewer residents with high school diplomas/GEDs and associate's degrees.

Many high school students selected the Health Science career cluster in keeping with state trends. The next most popular career cluster was Arts, Audio/Video/Technology, and Communications.

Demand Findings

Employer demand was consistent between online advertisements (current) and 2018 projected occupations (long-term needs) in general. Among the leaders by the need for workers were Business, Management, and Administration; Health Science; and Marketing, Sales, and Service. Hospitality and Tourism was a long-term demand. Most of the top projected occupations require at least a high school diploma or GED.

Figure 29: Comparison of Supply and Demand

	Demand		Supply	
	Top online ads	Projected Occupations	Degrees Earned	Career Clusters Selected
Agriculture, Food and Natural Resource	2.1	1.9	1.2	3.9
Architecture and Construction	7.2	5.3	7.5	4.0
Arts, Audio/Video Technology and Communications	2.0	1.5	4.4	14.4
Business, Management and Administration	14.4	19.4	10.6	6.9
Education and Training	2.0	4.1	13.2	6.1
Finance	4.2	3.0	0.1	1.4
Government and Public Administration	0.1	0.2	1.5	3.1
Health Science	11.9	9.0	24.5	22.1
Hospitality and Tourism	4.9	11.3	0.0	2.7
Human Service	4.8	6.3	15.4	5.7
Information Technology	7.0	2.7	1.3	2.8
Law, Public Safety, Corrections and Security	1.1	1.8	2.4	8.4
Manufacturing	5.6	8.7	1.3	1.9
Marketing, Sales and Service	16.5	15.5	1.8	1.3
Science, Technology, Engineering and Mathematics	5.9	2.3	6.6	12.2
Transportation, Distribution, and Logistics	10.3	7.1	8.3	3.0

Source: BLS, SCDEW, WI, SC Department of Education, OES, HWOL

A few observations about the comparison that could be considered challenges to the workforce pipeline include:

- There are fewer area graduates and students in Hospitality and Tourism; Manufacturing; and Marketing, Sales and Service than are needed by employers in both the short- and long-terms.
- More graduates and students chose Health Science than area employers need.
- There are more graduates in Education and Training and Human Service than open positions currently available.
- There is a higher job demand in Finance and Information Technology than there are recent graduates to fill it.
- More students are choosing Arts, Audio/Video Technology and Communication; Law, Public Safety, Corrections and Security; and Science, Technology, Engineering and Mathematics than the long-term area employment demand requires.
- There is a long-term demand for workers in Business, Management and Administration; and Transportation, Distribution, and Logistics that is not projected to be met by today's area students.

There is always a demand for employees with soft skills. It is said that hard skills (training, degrees, or certification) get you hired, but soft skills get you fired. Many of our residents need to learn or get a refresher in soft skills in order to KEEP their jobs. Employers see the need.

Top 10 Soft Skills Found in Online Ads for South Carolina (April 2013)

1. Oral and written communication skills
2. Customer service oriented
3. Problem solving
4. Detail oriented
5. Microsoft Office
6. Self-starting / Self-motivated
7. Organizational skills
8. Troubleshooting
9. Work independently
10. Sales experience

Source: The Conference Board Help Wanted OnLine® Data Series (HWOL)

CONCLUSION

The workforce (current and potential) in the Greenville LWIA area seems to be in good shape. The population continues to increase, and the education level for the population is better than the state as a whole with higher levels of residents with education beyond high school. There are high levels of employers advertising for jobs in business, management, marketing, and sales. However, some supply flows could be fine-tuned to be more in line with demand.

The data shows that in the area:

- There is an undersupply of students choosing Business, Management, and Administration; Hospitality and Tourism; Manufacturing; Transportation, Distribution, and Logistics; and Marketing, Sales and Service to meet Greenville's future demand.
- There is an oversupply of students choosing Arts, Audio/Video Technology and Communication; Health Science; Law, Public Safety, Corrections, and Security; and STEM that will far outpace the area's employment projections.
- Comprehensive soft skills training is needed for all students and job seekers (high school, post-secondary, adult, new and returning entrants to the labor force, and incumbent workers) so that they can not only get hired but retain their positions and thus reduce employee turnover.

Getting education more in line with the demands of employers will help the Greenville LWIA continue its "hard-earned momentum" and keep it as one of the areas of South Carolina with a bright future.

LOWCOUNTRY LWIA WORKFORCE REPORT 2012



The *Lowcountry Workforce Report* is published by the Labor Market Information (LMI) Department of the South Carolina Department of Employment and Workforce. The information and analyses provided in this publication are based on data collected from sources throughout South Carolina and the United States.

About SC DEW and LMI:

The Labor Market Information Department compiles and publishes employment statistics, job forecasts, wage data, demographics, and other labor market information to help public and private organizations, researchers, and others better understand today's complex workforce.

The LMI Department produced this report under the leadership of:

Executive Director - Cheryl Stanton
Interim Deputy Assistant Executive Director - Kerry Paul
Labor Market Information Director - Brenda Lisbon

South Carolina Department of Employment and Workforce
1550 Gadsden Street
Columbia, South Carolina 29201
(803) 737-2660
www.dew.sc.gov
www.scworkforceinfo.com



TABLE OF CONTENTS

EXECUTIVE SUMMARY	VI
INTRODUCTION	VII
ECONOMIC DISCUSSION: A CURRENT PICTURE OF THE WORKFORCE	1
EMPLOYMENT BY INDUSTRY	1
LOCATION QUOTIENT	1
AVERAGE ANNUAL WAGE BY INDUSTRY	2
OCCUPATIONAL EMPLOYMENT	3
SKILLS DATA.....	4
EMPLOYMENT AND UNEMPLOYMENT	6
NEW STARTUP FIRMS	8
EMPLOYERS BY SIZE OF ESTABLISHMENT	9
SUPPLY: WHAT'S OUT THERE?	10
POPULATION BY AGE	10
POPULATION CHANGE AND MIGRATION	11
COMMUTING PATTERNS	12
EDUCATIONAL ATTAINMENT	12
CAREER CLUSTERS SELECTED BY HIGH SCHOOL STUDENTS	13
DEGREES AWARDED	15
CHARACTERISTICS OF UI CLAIMS BY OCCUPATION	16
UNEMPLOYMENT INSURANCE CLAIMANT CHARACTERISTICS.....	17
DEMAND: WHAT DO WE NEED?	20
ONLINE JOB ADVERTISEMENTS.....	20
INDUSTRY PROJECTIONS	20
OCCUPATIONAL PROJECTIONS	21
SKILLS OF PROJECTED OCCUPATIONS	24
WORKFORCE CHALLENGES	25
CONCLUSION	27

TABLE OF FIGURES

FIGURE 1: LOWCOUNTRY LWIA EMPLOYMENT BY INDUSTRY - 3RD QUARTER 2012.....	1
FIGURE 2: NOTABLE LOWCOUNTRY LWIA LOCATION QUOTIENTS - 2011	2
FIGURE 3: ANNUAL AVERAGE WAGE BY INDUSTRY - 3RD QUARTER 2012.....	3
FIGURE 4: TOP 20 OCCUPATIONS WITH WAGES - 2012.....	4
FIGURE 5: TOP OCCUPATIONS BY SKILL CLASSIFICATION - LOWCOUNTRY 2012.....	5
FIGURE 6: EMPLOYMENT - 2002-2012.....	6
FIGURE 7: UNEMPLOYMENT - 2002-2012	7
FIGURE 8: ANNUAL UNEMPLOYMENT - 2002-2012	8
FIGURE 9: MONTHLY UNEMPLOYMENT RATE - MARCH 2011-APRIL 2013.....	8
FIGURE 10: NEW STARTUP FIRMS - 2007-2012.....	9
FIGURE 11: EMPLOYERS BY SIZE OF ESTABLISHMENT - 3RD QUARTER 2012.....	9
FIGURE 12: POPULATION BY AGE	10
FIGURE 13: POPULATION PROJECTIONS TO 2030.....	11
FIGURE 14: POPULATION MIGRATION - 2011 - 5-YEAR ESTIMATE.....	11
FIGURE 15: COMMUTING PATTERNS - 2010.....	12
FIGURE 16: EDUCATIONAL ATTAINMENT - LOWCOUNTRY AND SOUTH CAROLINA 2011	12
FIGURE 17: EDUCATIONAL ATTAINMENT - LOWCOUNTRY 2011.....	13
FIGURE 18: PERCENT OF STUDENTS DECLARING A CAREER CLUSTERS IN LOWCOUNTRY AND SC - 2012	14
FIGURE 19: CAREER CLUSTERS - 2012.....	15
FIGURE 20: TOP 20 MAJORS IN LOWCOUNTRY - 2011	16
FIGURE 21: CHARACTERISTICS OF UI CLAIMS BY OCCUPATION - APRIL 2013.....	17
FIGURE 22: UI CLAIMANT CHARACTERISTICS - APRIL 2013.....	18
FIGURE 23: LOWCOUNTRY HWOL - FEBRUARY 2013 BY MAJOR GROUP	20
FIGURE 24: INDUSTRY PROJECTIONS - 2008-2018	21
FIGURE 25: GROWING OCCUPATIONS - 2008-2018.....	22
FIGURE 26: EDUCATION FOR TOP 50 PROJECTED OCCUPATIONS	23
FIGURE 27: TOP 20 PROJECTED DECLINING OCCUPATIONS IN LOWCOUNTRY - 2008-2018.....	24
FIGURE 28: SKILL LEVELS.....	24
FIGURE 29: COMPARISON OF SUPPLY AND DEMAND.....	25

EXECUTIVE SUMMARY

The employment leaders for Lowcountry Local Workforce Investment Area (LWIA) are Accommodation and Food Services and Retail Trade. Employment growth is anticipated by 2018 in several industries, especially Health Care and Social Assistance and Agriculture, Forestry, Fishing and Hunting. The highest wages are paid by the Utilities and Finance and Insurance industries.

The LWIA's population grew by nearly 20 percent from 2000 to 2010 but has notably fewer residents aged 25 to 54 and more residents aged 60 and older than the state's average.

Employment is rising, and unemployment is declining. The LWIA has a historically lower unemployment rate than the state, but the gap shrank during and after the recession. Employment is concentrated in Beaufort and Hilton Head, but nearly 3,200 more people leave the LWIA for work than enter it every day. Accommodation and Food Service is the largest industry represented in unemployment claims. This industry includes hotels and motels, recreational vehicle parks, restaurants, cafeterias, and drinking places.

Lowcountry has a higher proportion of residents with a bachelor's degree or higher than the state does as a whole. For projected growing jobs, 6 percent require no diploma, 34 percent require a diploma or GED, 26 percent require an associate's degree or vocational training, and 34 percent require a bachelor's degree or higher.

Lowcountry LWIA businesses desire a trained workforce with the current focus being on healthcare, marketing, and business services. Technology has become part of most occupations, requiring continuous training and skill-upgrading. A challenge for the LWIA is to match the skill levels of the workforce with open positions. There may be a mismatch between the employer's skill demands and the occupations that the worker will accept.

Lowcountry LWIA has several factors working in its favor. It has the cities of Beaufort and Hilton Head, which are nationally recognized tourist and retirement destinations. The coastal line and natural beauty of the LWIA maintain their allure for visitors and residents alike.

The patterns and trends described in this report offer cause for both optimism and concern. Lowcountry LWIA has an exciting future ahead of it and can lead the way in delivering the skilled talent and economic opportunities that businesses and workers in the area deserve.

INTRODUCTION

The Lowcountry Local Workforce Investment Area is composed of Beaufort, Colleton, Hampton, and Jasper counties. Lowcountry LWIA is the southernmost tip of the state and shares its borders with Georgia and the Atlantic Ocean. Aside from a few cities and towns (Hilton Head, Beaufort), the area is mostly rural and is geographically bounded by the Salkehatchie, Savannah, and Yemassee rivers. A rich history includes the Revolutionary and Civil Wars, Native Americans, and the Gullah culture. The Agricultural and Hospitality industries have dominated the economic history of the Lowcountry LWIA.

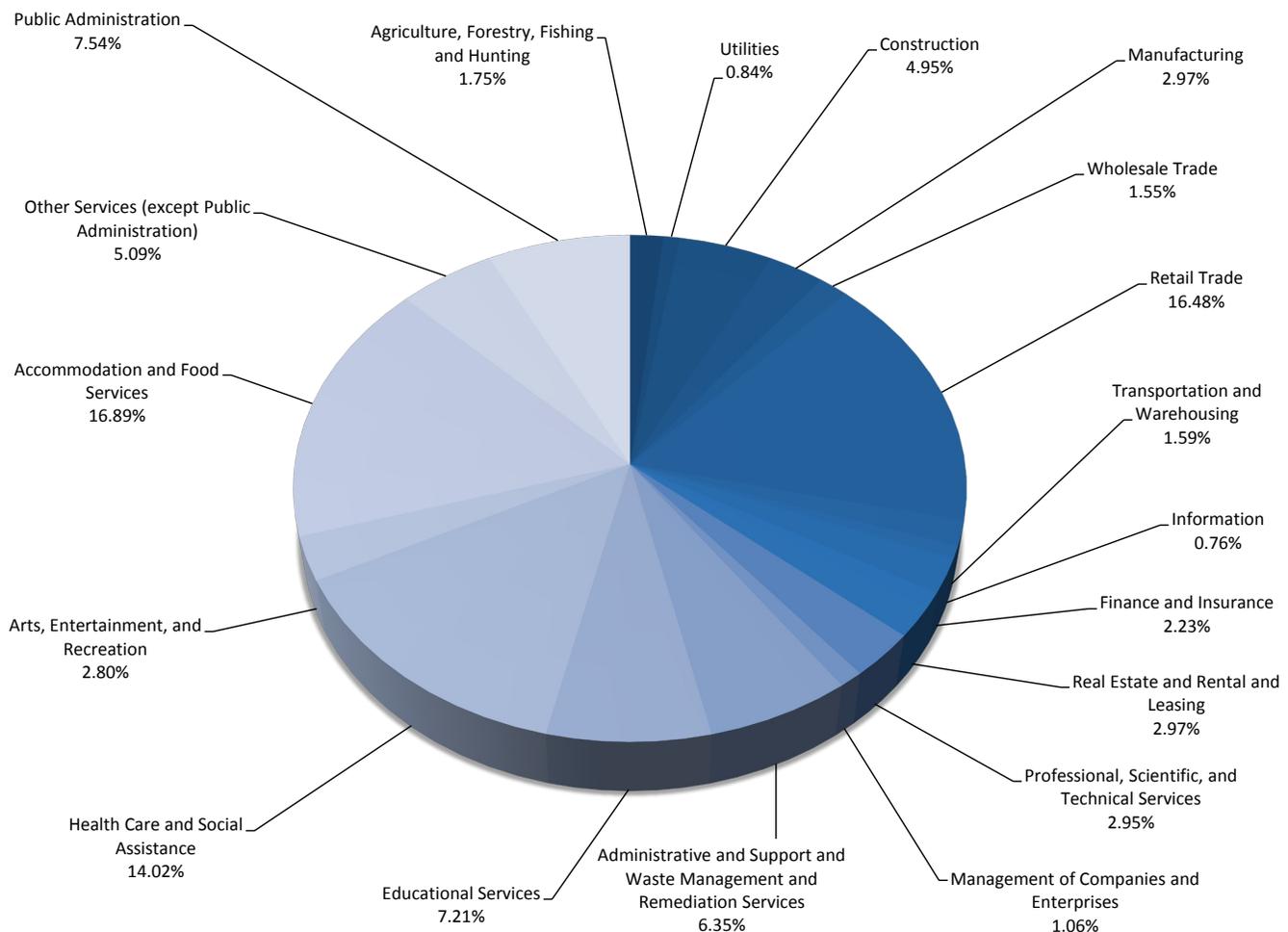
The economic changes this year in the Lowcountry LWIA demonstrate the shifting needs of employers and employees. Cultivating an understanding of the workforce allows all four counties to respond to anticipated future needs. Analyses help to identify the gap between what the workforce has in the way of talent and skills (supply), and what it may need in the future (demand).

The purpose of the Lowcountry LWIA Workforce Report is to present a comprehensive view of the status of Lowcountry LWIA's economy and workforce. The report includes an analysis of Lowcountry LWIA's workforce, industries, economic climate, and factors that will affect all. Forecasts will be made for the workforce, industries, and the economy.

ECONOMIC DISCUSSION: A CURRENT PICTURE OF THE WORKFORCE

EMPLOYMENT BY INDUSTRY

Figure 1: Lowcountry LWIA Employment By Industry - 3rd Quarter 2012



Source: Bureau of Labor Statistics (BLS), SC Department of Employment & Workforce (SCDEW), Quarterly Census of Employment and Wages (QCEW)

Accommodation and Food Services and Retail Trade are the top two industries employing workers in the Lowcountry LWIA. Industries like Educational Services and Healthcare and Social Assistance are healthy and flourishing, while others like Construction are still recovering from the recession. The 2010 per capita income for Lowcountry LWIA was \$31,074, which is a 37.3 percent growth from 2000.¹ Economic growth has taken place in the past decade to enhance the LWIA workforce, although the area is still recovering from a tough business cycle.

LOCATION QUOTIENT

A location quotient (LQ) is a useful tool for determining the concentration of workers in a given area. Location quotients compare the regional share of employment in a particular industry to the national share of employment in the same industry. The resulting quotient reveals the degree of regional specialization or concentration in an industry and provides insight into what makes the area unique in comparison to the national average. An LQ of 1.0 means the concentration of jobs in that industry matches the nation's value. Location quotients higher than 1.0 indicate the level of specialization

the area has in particular sectors. Lower quotients can indicate possible industries that could be expanded.

Figure 2: Notable Lowcountry LWIA Location Quotients - 2011

Industry and Sectors	Location Quotient
<i>Beaufort County</i>	
Real Estate and Rental and Leasing	2.5
Arts, Entertainment and Recreation	2.3
Leisure and Hospitality	2.2
<i>Colleton County</i>	
Forestry and Logging	52.3
Wood Product Manufacturing	9.7
Natural Resources and Mining	4
<i>Hampton County</i>	
Forestry and Logging	91.9
Agriculture, Forestry, Fishing and Hunting	7.1
Natural Resources and Mining	4.4
<i>Jasper County</i>	
Forestry and Logging	35.3
Nonmetallic Mineral Product Manufacturing	4.3
Agriculture, Forestry, Fishing and Hunting	2.5

Source: US Department of Labor, Bureau of Labor Statistics - http://data.bls.gov/location_quotient

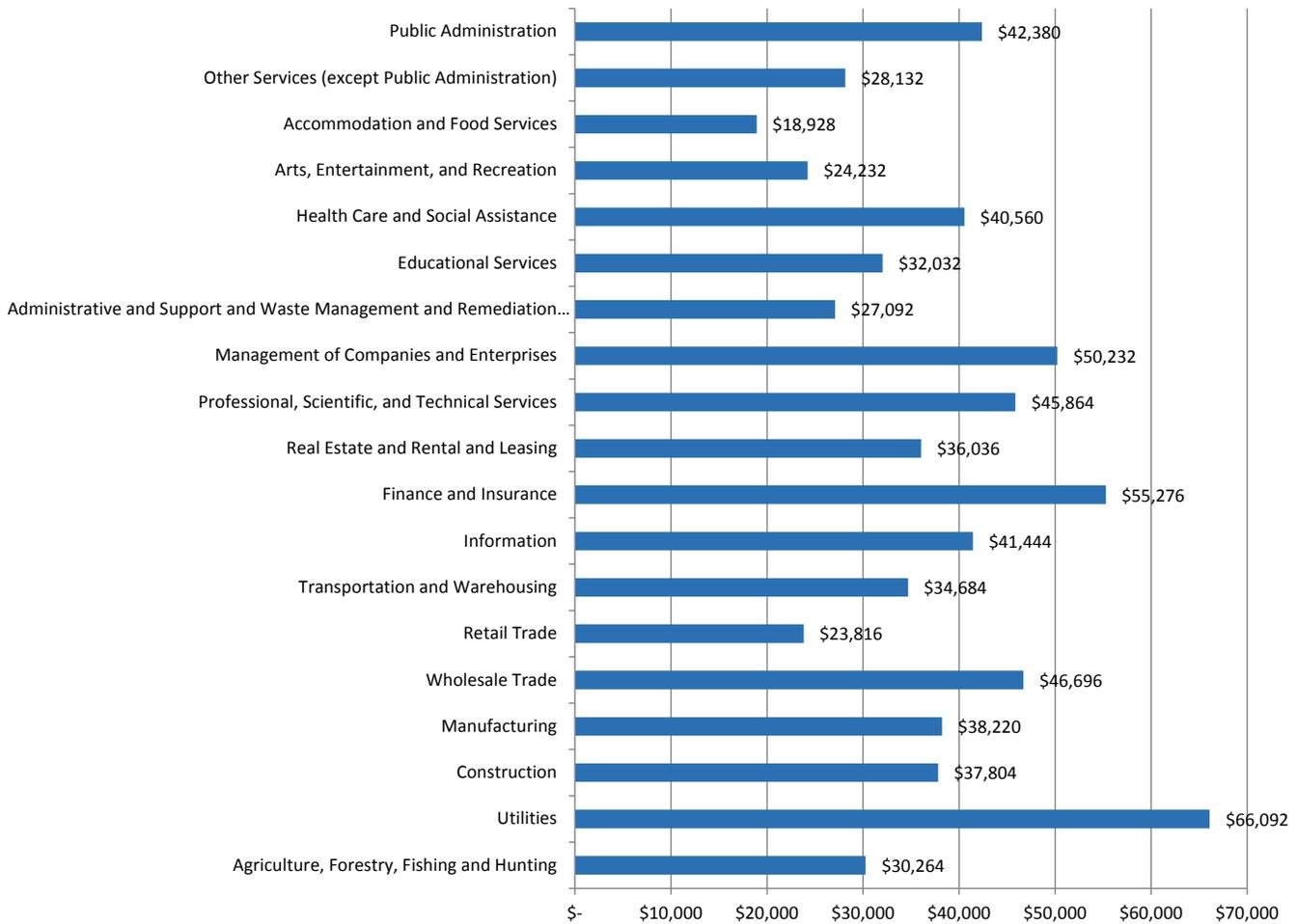
Forestry and Logging tops the most concentrated industries in this area with location quotients over 35 in Colleton, Hampton, and Jasper counties. Other sectors located throughout the area include Agriculture, Forestry, Fishing and Hunting; Natural Resources and Mining; and Wood Product and Nonmetallic Mineral Product Manufacturing. Leisure and Hospitality, Recreation, and Real Estate industries are concentrated in Beaufort County.

AVERAGE ANNUAL WAGE BY INDUSTRY

The annual wages for utility workers are the highest for any LWIA industry. Utility workers have a wide range of education (high school diploma to PhD) and tend to stay in their jobs for a very long time, which increases the average wage as small raises accumulate over time. Finance and Insurance workers are the second highest paid group of employees in the LWIA.

High wage industries like Professional, Scientific, and Technical Services and Finance and Insurance usually require at least a bachelor’s degree. Having an education is an excellent way to enter a high-wage industry and have more options for employment.

Figure 3: Annual Average Wage by Industry - 3rd Quarter 2012



Source: BLS, SCDEW, QCEW

OCCUPATIONAL EMPLOYMENT

When examining the current occupational employment in the area, one can observe that some of the top 20 occupations are low-skill, low-pay jobs. These jobs, like Cashiers, Waiters and Waitresses, and Maids and Housekeeping Cleaners, have high turnover. These are not necessarily the most robust jobs as far as wages, but they are jobs.

Figure 4 lists occupations, such as Registered Nurses, Elementary School Teachers, and First-Line Supervisors, that pay a higher wage. With Accommodations and Food, Retail Trade, and Healthcare sectors comprising about 47 percent of the employment in the Lowcountry LWIA, the positions of Food Preparation and Serving Workers; Retail Salespersons; and Registered Nurses, not surprisingly, are listed among the top occupations.

Figure 4: Top 20 Occupations with Wages - 2012

Occupational Title	Total Employment	Hourly Average Wage (\$)
All Occupations	107,680	17.17
Retail Salespersons	5,320	12.26
Cashiers	4,700	8.90
Waiters and Waitresses	3,740	10.27
Landscaping and Groundskeeping Workers	2,790	10.37
Office Clerks, General	2,560	12.42
Combined Food Preparation and Serving Workers, Including Fast Food	2,470	8.81
Customer Service Representatives	2,280	13.18
Registered Nurses	2,220	31.13
Laborers and Freight, Stock, and Material Movers, Hand	1,860	10.80
Maintenance and Repair Workers, General	1,840	16.63
Janitors and Cleaners, Except Maids and Housekeeping Cleaners	1,830	10.77
Cooks, Restaurant	1,800	10.48
Maids and Housekeeping Cleaners	1,800	10.02
Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	1,740	15.33
General and Operations Managers	1,610	43.94
Bookkeeping, Accounting, and Auditing Clerks	1,510	16.80
First-Line Supervisors of Retail Sales Workers	1,490	18.59
Elementary School Teachers, Except Special Education	1,480	22.25
Personal Care Aides	1,230	9.64
First-Line Supervisors of Food Preparation and Serving Workers	1,090	16.28

Source: BLS, SCDEW, Occupational Employment Statistics (OES)

SKILLS DATA

Employers are beginning to see that a person's skills, in addition to their education, may help in determining who to hire. Many times the degree is not as important as the skills gained through specialized training and/or experience. In order to be able to determine the current level of skills in the area, the top 50 current occupations by employment are presented, and assigned a low, middle, or high skill designation to that occupation. The definitions for those skills levels are:

- LOW: No high school or GED, or high school/GED with less than one year experience and no on-the-job-training (OJT), or short-term OJT
- MIDDLE: High school/GED with one year experience, or moderate OJT, or long-term OJT, or apprenticeship, or postsecondary vocational training, or some college, or associate's degree, or less than a bachelor's degree
- HIGH: Bachelor's degree or higher

In the Lowcountry area, 29 of the top 50 jobs in 2012 are considered low-skill jobs. Seventeen are middle skill, and four are high-skill occupations.

Figure 5: Top Occupations By Skill Classification - Lowcountry 2012

Skillset: LOW
Amusement and Recreation Attendants
Bartenders
Cashiers
Combined Food Preparation and Serving Workers, Including Fast Food
Construction Laborers
Cooks, Fast Food
Cooks, Institution and Cafeteria
Cooks, Restaurant
Counter Attendants, Cafeteria, Food Concession, and Coffee Shop
Customer Service Representatives
Dining Room and Cafeteria Attendants and Bartender Helpers
Dishwashers
Food Preparation Workers
Hosts and Hostesses, Restaurant, Lounge, and Coffee Shop
Janitors and Cleaners, Except Maids and Housekeeping Cleaners
Laborers and Freight, Stock, and Material Movers, Hand
Landscaping and Groundskeeping Workers
Light Truck or Delivery Services Drivers
Maids and Housekeeping Cleaners
Office Clerks, General
Personal Care Aides
Receptionists and Information Clerks
Retail Salespersons
Secretaries and Administrative Assistants, Except Legal, Medical, and Executive
Security Guards
Stock Clerks and Order Fillers
Teacher Assistants
Tellers
Waiters and Waitresses
Skillset: MIDDLE
Automotive Service Technicians and Mechanics
Bookkeeping, Accounting, and Auditing Clerks
Carpenters
Firefighters
First-Line Supervisors of Food Preparation and Serving Workers
First-Line Supervisors of Office and Administrative Support Workers
First-Line Supervisors of Retail Sales Workers
General and Operations Managers
Heavy and Tractor-Trailer Truck Drivers
Licensed Practical and Licensed Vocational Nurses
Maintenance and Repair Workers, General
Medical Secretaries
Nursing Assistants
Police and Sheriff's Patrol Officers
Registered Nurses
Sales Representatives, Wholesale and Manufacturing, Except Technical and Scientific Products
Substitute Teachers
Skillset: HIGH
Accountants and Auditors
Elementary School Teachers, Except Special Education
Middle School Teachers, Except Special and Career/Technical Education
Secondary School Teachers, Except Special and Career/Technical Education

Source: BLS, SCDEW, OES, Workforce Intelligence (WI)

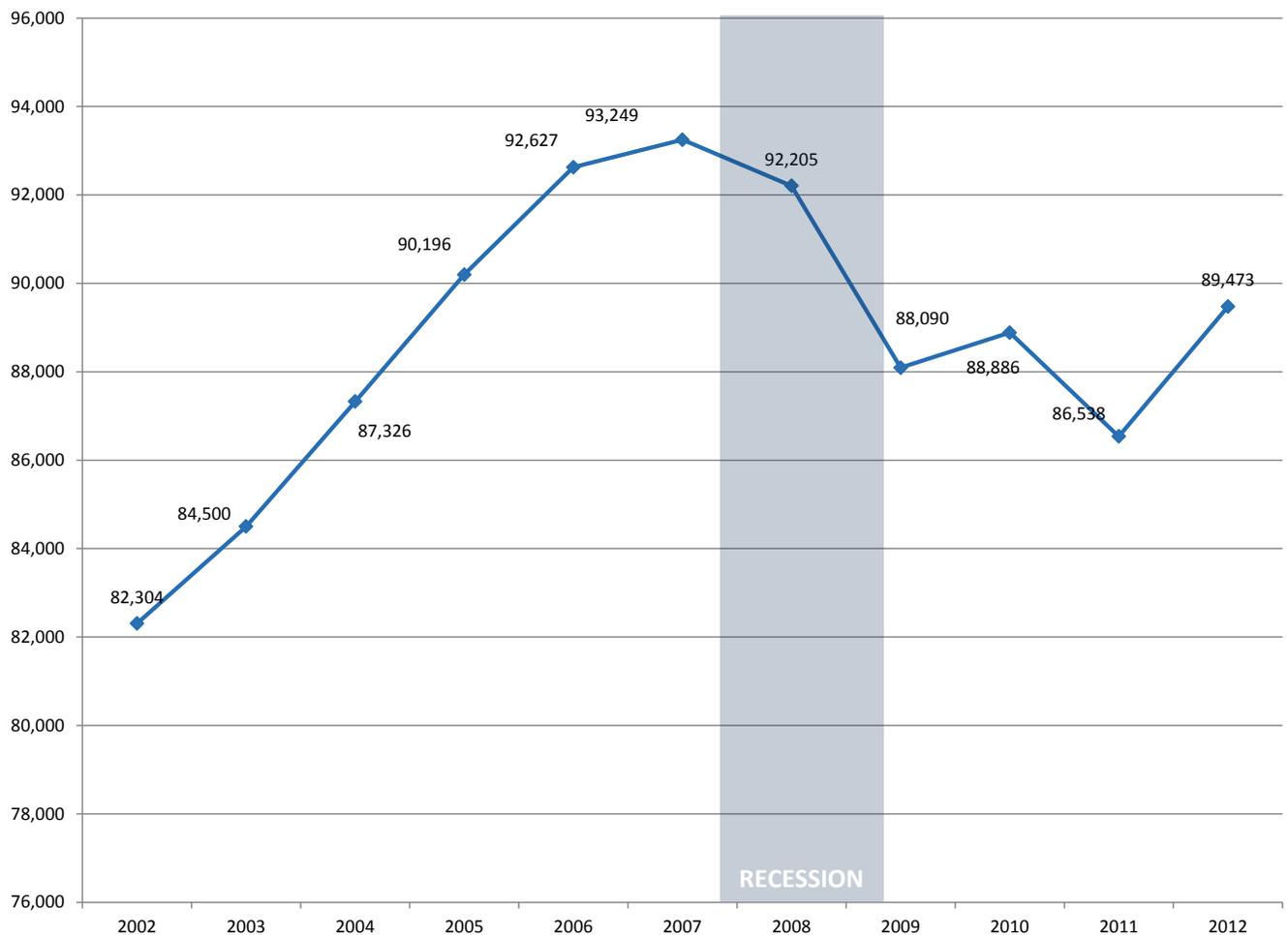
EMPLOYMENT AND UNEMPLOYMENT

A crucial indicator of the health of a workforce is its labor force levels. Labor force data count residents who are employed and unemployed. There are a few Federal definitions that will make discussion of the labor force a little easier to understand.

- Employed: Persons 16 years old or older who worked for pay any time during the week that includes the 12th of the month
- Unemployed: Persons 16 years old or older who are not working but want a job, and are able and willing to work
- Labor Force: Employed plus unemployed
- Unemployment Rate: Unemployment divided by labor force

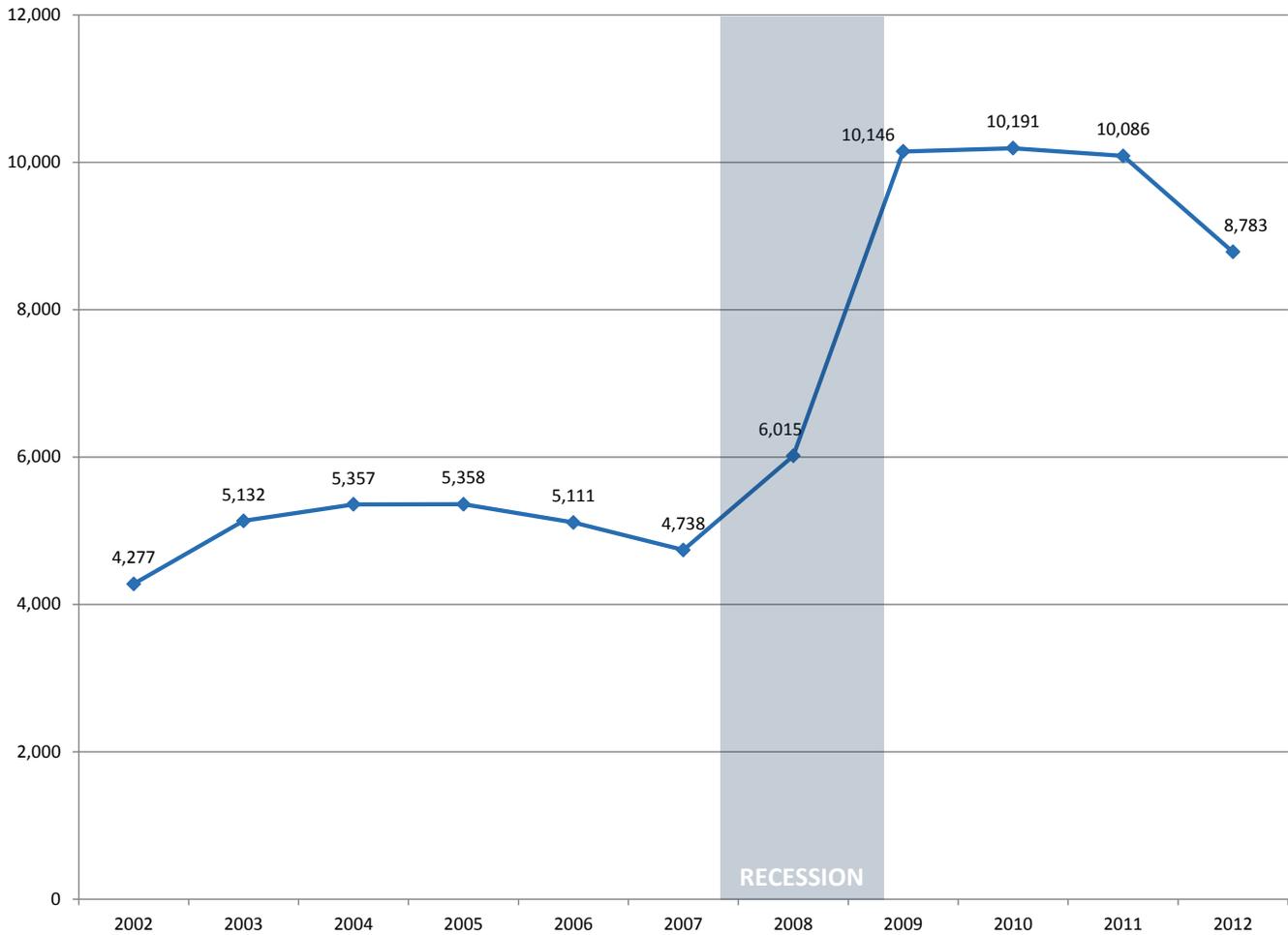
In Figure 6, the recession (officially from December 2007 through June 2009) had a great effect on the labor force. Employment dropped, and unemployment increased by 114 percent.

Figure 6: Employment - 2002-2012



Source: BLS, SCDEW, Local Area Unemployment Statistics (LAUS)

Figure 7: Unemployment - 2002-2012

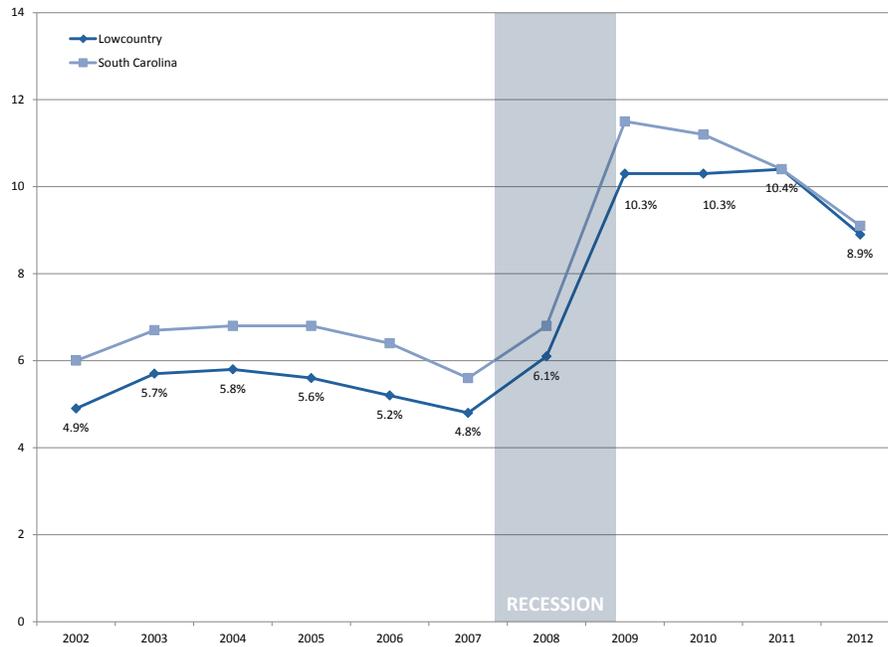


Source: BLS, SCDEW, LAUS

Tracking annual unemployment rates give a good snapshot of the state of an area's workforce. Annual rates smooth out the usual ups and downs of a month-to-month rate (due to normal seasonal or cyclical changes) to give a more accurate picture.

Figure 8 shows the annual rates for the Lowcountry LWIA area and South Carolina. Lowcountry has historically been below the state's rate, but the gap between the two shrank considerably during and after the recession. During the recession, the Lowcountry rate more than doubled from 4.8 percent in 2007 to 10.3 percent in 2009.

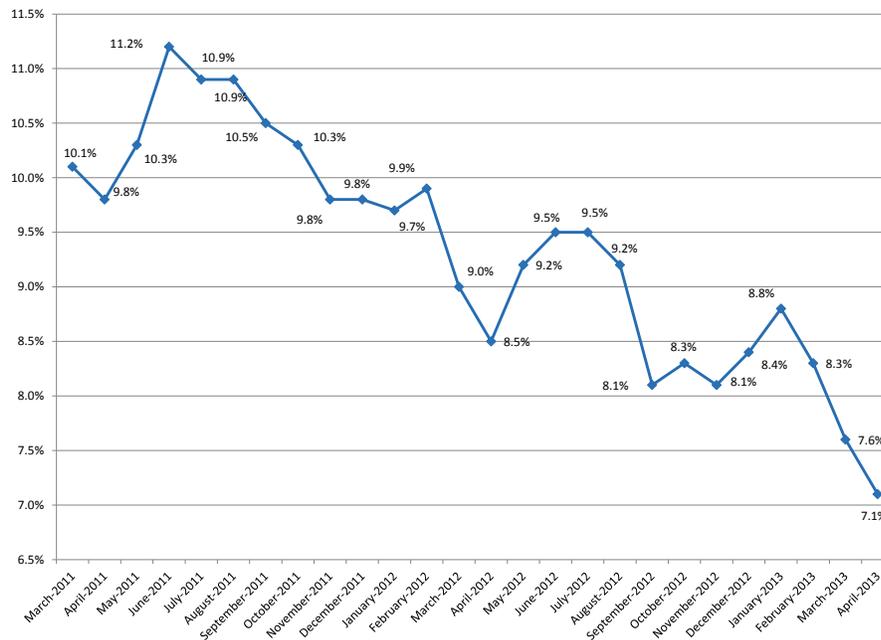
Figure 8: Annual Unemployment - 2002-2012



Source: BLS, SCDEW, LAUS

Figure 9 illustrates that the monthly unemployment rate has seen wide fluctuations since March 2011. The area seems to be steadily recovering from the recession.

Figure 9: Monthly Unemployment Rate - March 2011-April 2013



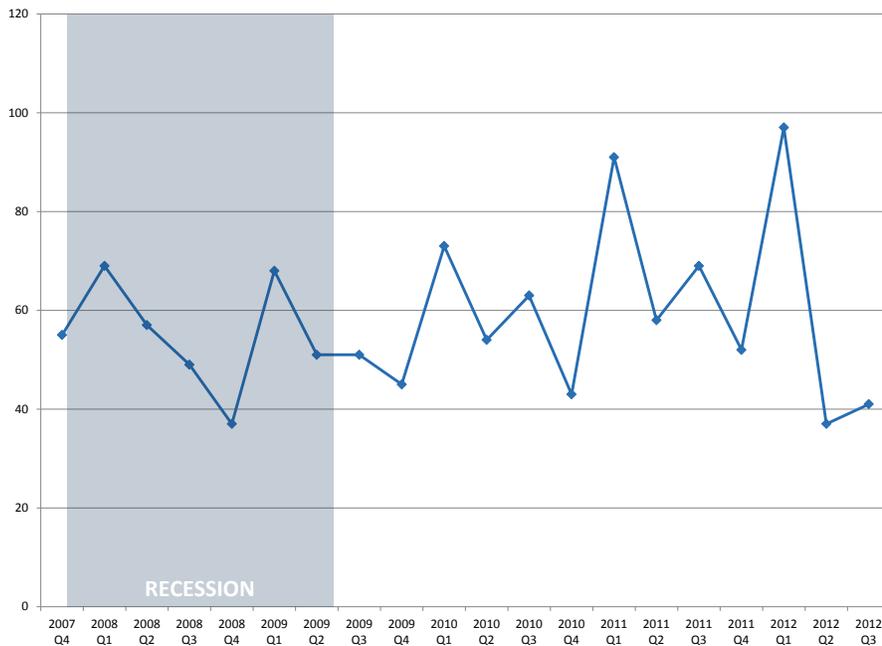
Source: BLS, SCDEW, LAUS

NEW STARTUP FIRMS

One way to see if an economy is improving is to examine data about startup firms. An increase in new companies might be an indicator of expansion in the area, whereas a drop in new firms shows a lack of confidence in the future. (Note: There is almost always a spike in startups in the first quar-

ter of the year.) Again, the recession had a major impact on normal business birth and death rates. Startups have been steady in the area with a large increase in early 2012.

Figure 10: New Startup Firms - 2007-2012



Source: BLS, SCDEW, QCEW

EMPLOYERS BY SIZE OF ESTABLISHMENT

By far, the largest category of business size in the area is small business. Small businesses (or establishments) are defined in South Carolina as companies employing 49 or fewer people. The Lowcountry LWIA has 95 percent of establishments designated as small businesses, and South Carolina as a whole has 93 percent.

Small businesses may need more support and assistance than larger companies because they may not have a designated human resources department or person. They may rely on other resources, such as SC Works Centers, for help with hiring, training, or screening job candidates.

Figure 11: Employers by Size of Establishment - 3rd Quarter 2012

Employees	Lowcountry	South Carolina
0 to 4	3,486	63,766
5 to 9	1,216	19,667
10 to 19	785	13,316
20 to 49	509	9,881
50 to 99	170	3,907
100 to 249	92	2,433
250 to 499	24	757
500 to 999	0	328
1000 +	0	264

Source: BLS, SCDEW, QCEW

SUPPLY: WHAT'S OUT THERE?

A manufacturing assembly line needs to have resources and supplies on-hand so that the line does not have to stop. The same is true for the workforce. The supply of workers needs to be of the right quantity and quality to do the job. Is the supply of workers in line with what the companies in the Lowcountry LWIA need? Seven streams of workforce supply provide an indication: population, commuting, education of the population, clusters of high school students, awards earned at higher education institutions, and characteristics of unemployment insurance claims and claimants.

POPULATION BY AGE

Age distribution in the area varies from the state and the country for large segments of the population. In the 25-54 age cohorts, Lowcountry has a notably lower proportion of population, and in the 60-84 age cohorts, the LWIA has a markedly higher proportion of population.

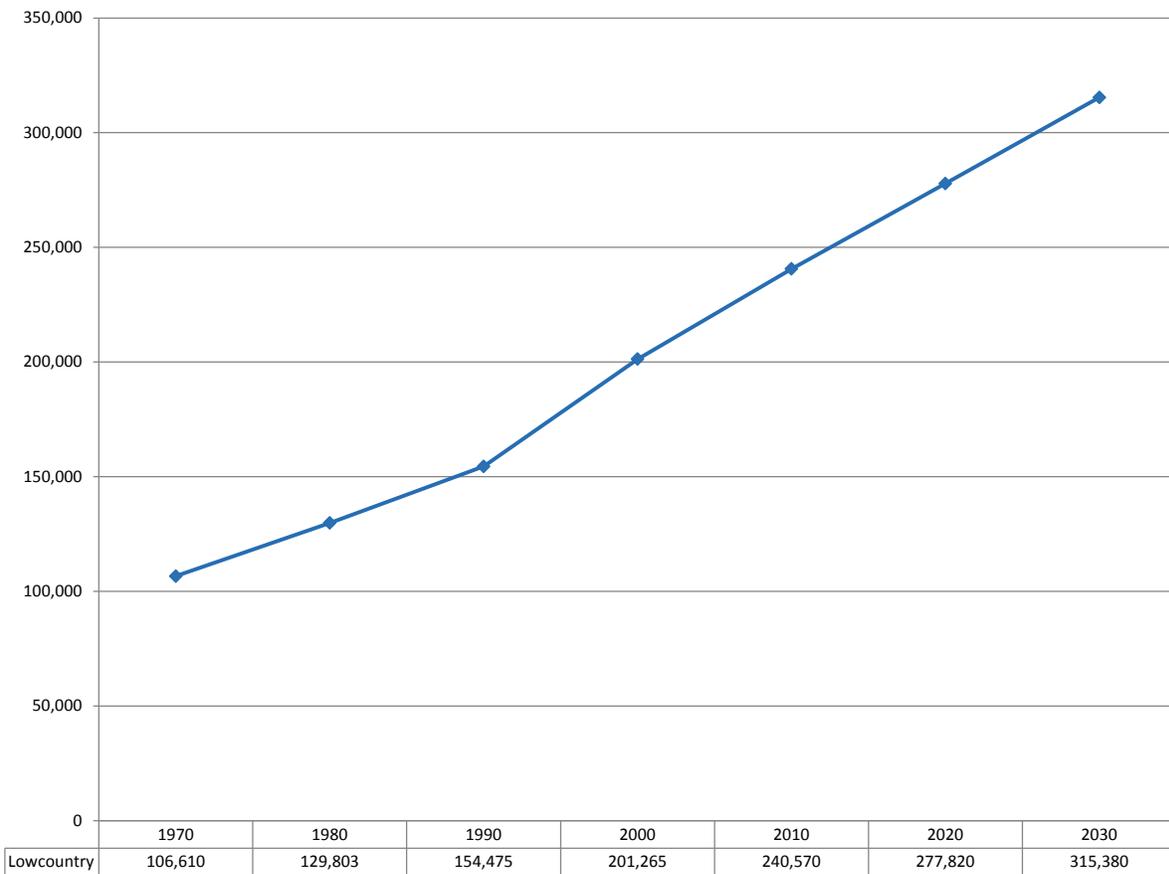
Figure 12: Population by Age

Age Range	Lowcountry	SC	US
0-4	6.7%	6.5%	6.6%
5-9	5.7%	6.4%	6.6%
10-14	6.3%	6.5%	6.7%
15-19	6.5%	7.2%	7.2%
20-24	7.1%	7.2%	7.0%
25-29	6.4%	6.6%	6.8%
30-34	5.8%	6.2%	6.4%
35-39	5.8%	6.5%	6.6%
40-44	5.9%	6.8%	7.0%
45-49	6.2%	7.2%	7.4%
50-54	6.3%	7.0%	7.2%
55-59	6.3%	6.5%	6.3%
60-64	7.0%	5.9%	5.3%
65-69	6.1%	4.5%	3.9%
70-74	4.6%	3.3%	3.0%
75-79	3.1%	2.5%	2.4%
80-84	2.3%	1.7%	1.9%
85 and older	1.7%	1.5%	1.7%

Source: US Bureau of Census, American Community Survey (ACS)

POPULATION CHANGE AND MIGRATION

Figure 13: Population Projections to 2030



Source: US Census Bureau, Census 2000, SC Department of Health and Environmental Control - Vital Records Department. Population projections calculated by SC Budget and Control Board, Office of Research and Statistics

After a large jump in population from 1990 to 2000 (up 30.3 percent), the growth of the population of this area slowed down moderately, growing nearly 20 percent over the next 10 years. Growth is projected to increase more than 1 percent per year to 2030.

Figure 14: Population Migration - 2011 - 5-Year Estimate

	Total	Moved From Different State	Moved From Abroad	Moved From Different County	Moved Within Same County
Population 1 year and over	239,850	5.6%	0.8%	2.2%	7.3%
Hispanic or Latino origin (of any race)	22,745	5.4%	3.9%	1.2%	9.3%
White alone, not Hispanic or Latino	143,296	6.7%	0.4%	2.2%	6.0%
Population 25 Years and Over					
Less than high school graduate	23,475	2.3%	1.0%	2.5%	6.9%
High school graduate/GED	48,232	2.9%	0.9%	2.1%	6.2%
Some college or associate's degree	44,720	6.0%	0.6%	1.8%	7.4%
Bachelor's degree	29,840	5.8%	0.3%	1.5%	5.1%
Graduate or professional degree	18,112	5.8%	0.4%	1.0%	2.6%

Source: US Census Bureau, ACS, SCDEW

In-migration (people moving into Lowcountry) shows that more than 6 percent of residents with a graduate degree and also those with a bachelor’s degree came from out of state or out of the country. While over 5 percent each of Hispanics and Whites moved into Lowcountry from another state, nearly 4 percent of Hispanics came from abroad. Though almost 16 percent of residents over the age of one moved, 6.4 percent came from outside of South Carolina.

COMMUTING PATTERNS

The vast majority of the workers (83 percent) of Lowcountry lives and works in the LWIA. The tables in Figure 15 show that nearly 7,800 workers commute in from other areas to work in the Lowcountry. Chatham County, Georgia draws a notable portion of Lowcountry LWIA’s residents out of the area to work. Almost 3,200 more employees commute out of the area than enter it to work.

Figure 15: Commuting Patterns - 2010

To Lowcountry WIA From	7,755	From Lowcountry WIA To	10,953
Chatham County, GA	1,625	Chatham County, GA	2,933
Dorchester County, SC	789	Charleston County, SC	2,238
Effingham County, GA	704	Dorchester County, SC	1,158
Allendale County, SC	643	Berkeley County, SC	498
		Allendale County, SC	491

Source: US Census Bureau, ACS

EDUCATIONAL ATTAINMENT

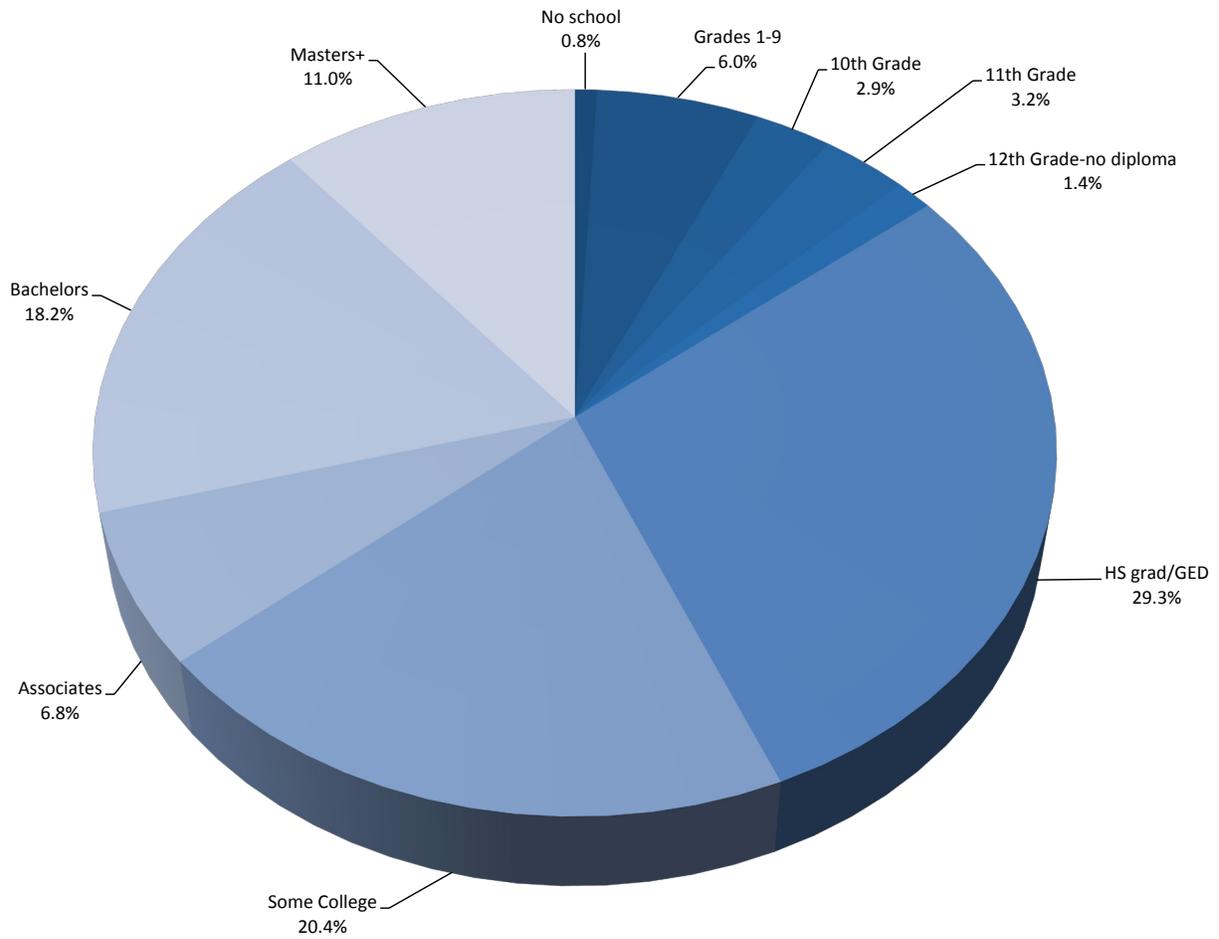
The Lowcountry LWIA is fortunate in that the LWIA has a lower concentration of residents with less than a high school diploma or GED than the state as a whole. It also has a higher percent of residents with a bachelor’s degree or higher than the state does.

Figure 16: Educational Attainment - Lowcountry and South Carolina 2011

Education Level	Lowcountry	SC
No school	0.8	1.1
Grades 1-9	6.0	7.0
10th Grade	2.9	3.3
11th Grade	3.2	3.2
12th Grade-no diploma	1.4	1.8
HS grad/GED	29.3	30.9
Some College	20.4	20.1
Associates	6.8	8.4
Bachelors	18.2	15.6
Masters+	11.0	8.6

Source: US Census Bureau, ACS, SCDEW

Figure 17: Educational Attainment - Lowcountry 2011

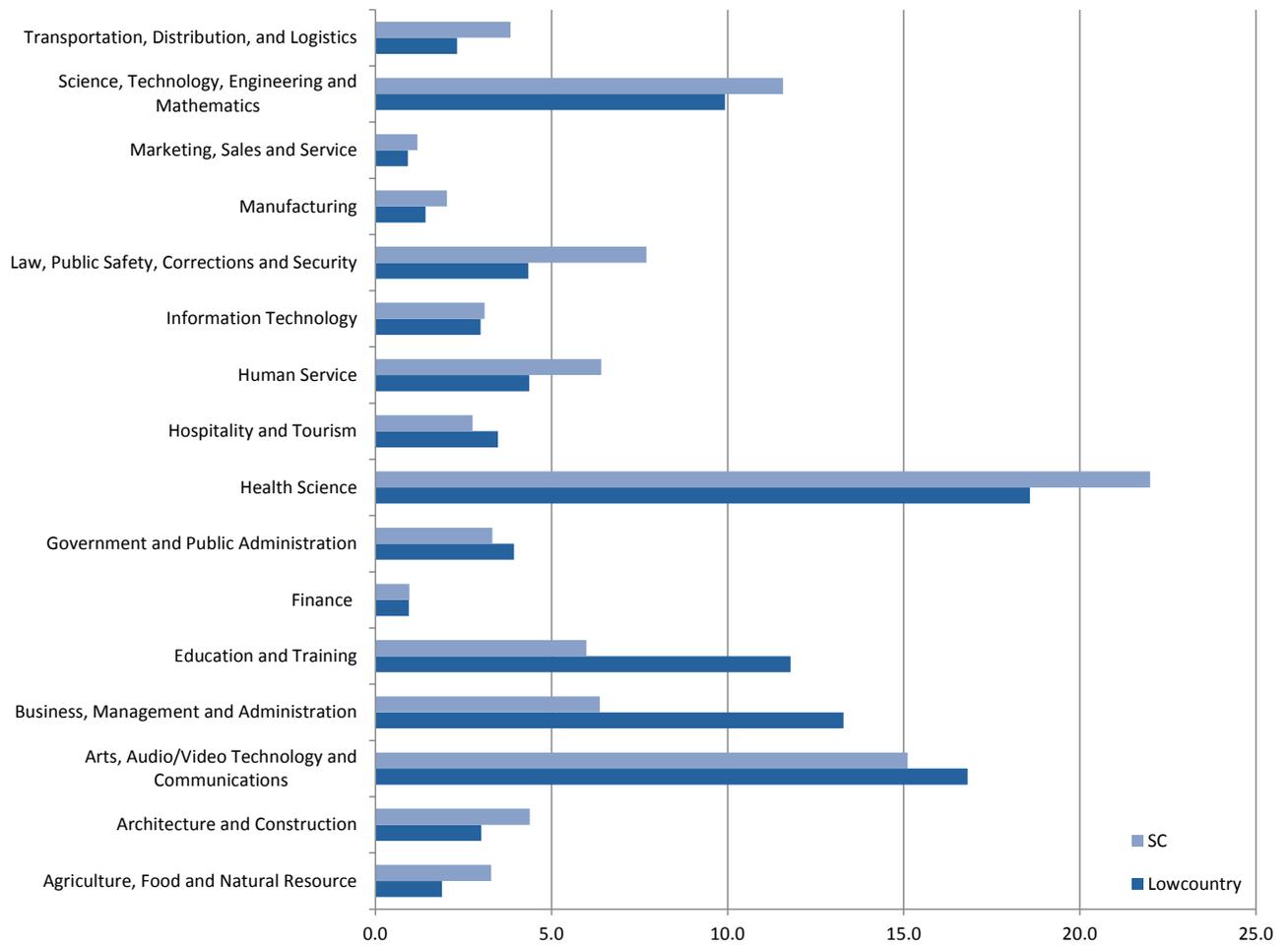


Source: US Census Bureau, ACS, SCDEW

CAREER CLUSTERS SELECTED BY HIGH SCHOOL STUDENTS

Eighth-grade students in South Carolina are required to choose a career cluster to concentrate on to lead them to a post-high school job or college major. There are 16 career clusters.

Figure 18: Percent of Students Declaring a Career Clusters In Lowcountry and SC - 2012



Note: Declared clusters for students declaring a specific cluster on their primary Electronic Individual Graduation Plan (e-IGP) for 2011-2012 year

Source: SC Department of Education

Many students in the Lowcountry area have chosen the Health Science career cluster in response to news of a shortage of healthcare workers in South Carolina. In keeping with the state trend, the area’s students also picked the Arts, Audio/Video Technology and Communications cluster in notable numbers. Business, Management and Administration and Education and Training clusters were choices for many students.

Figure 19: Career Clusters - 2012

Cluster	Lowcountry	SC
Agriculture, Food and Natural Resource	1.9	3.3
Architecture and Construction	3.0	4.4
Arts, Audio/Video Technology and Communications	16.8	15.1
Business, Management and Administration	13.3	6.4
Education and Training	11.8	6.0
Finance	0.9	1.0
Government and Public Administration	3.9	3.3
Health Science	18.6	22.0
Hospitality and Tourism	3.5	2.8
Human Service	4.4	6.4
Information Technology	3.0	3.1
Law, Public Safety, Corrections and Security	4.3	7.7
Manufacturing	1.4	2.0
Marketing, Sales and Service	0.9	1.2
Science, Technology, Engineering and Mathematics	9.9	11.6
Transportation, Distribution, and Logistics	2.3	3.8

Source: SC Department of Education

DEGREES AWARDED

In higher education, Lowcountry area colleges and universities have conferred a wide variety of awards. Of the top 20, Business Administration and Management and Registered Nursing are the most popular followed by Industrial Electronics Technology and Liberal Arts. The institutions included in this data are the Technical College of the Lowcountry and USC-Beaufort.

Figure 20: Top 20 Majors in Lowcountry - 2011

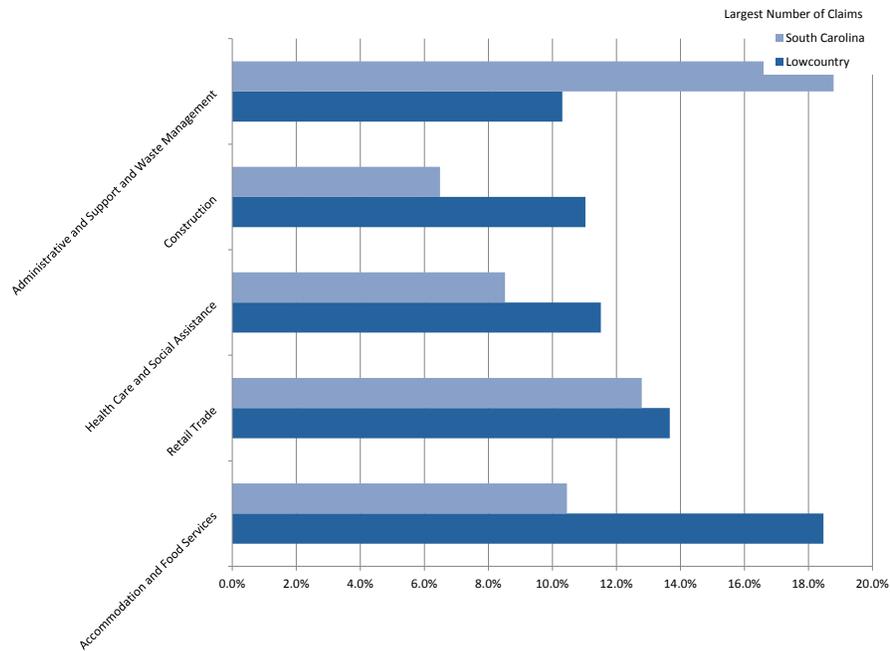
Majors	
Business Administration and Management, General	64
Registered Nursing/Registered Nurse	41
Industrial Electronics Technology/Technician	38
Liberal Arts and Sciences/Liberal Studies	38
Construction Engineering Technology/Technician	31
Heat, Air Cond, Ventilation & Refrig Maint Technology	30
Electrical and Electronic Engineering Technologies	30
Mechanical Drafting & Mechanical Drafting CAD/CADD	29
Nursing - Registered Nurse Training, BSN Generic	27
Business/Commerce, General	25
Early Childhood Education and Teaching	22
Social Sciences, General	22
Hospitality Administration/Management, General	22
Psychology, General	21
Biology/Biological Sciences, General	18
Physical Therapy Technician/Assistant	16
Cosmetology/Cosmetologist, General	16
Criminal Justice/Safety Studies	15
Health Professions and Related Programs	14
Medical Administrative/Executive Assistant	13
Child Care Provider/Assistant	13

Source: SC Commission on Higher Education, http://www.che.sc.gov/New_Web/Data&Pubs.htm

CHARACTERISTICS OF UI CLAIMS BY OCCUPATION

Another source of supply for the workforce is people who are receiving unemployment compensation. In the Lowcountry LWIA area, the highest number of claims is filed in the Accommodation and Food Services group followed by the Retail Trade group. The Accommodation and Food Services sector includes hotels and motels, recreational vehicle parks, restaurants, cafeterias, and drinking places. These industries highlight the tourist economy of the Lowcountry LWIA with workers supporting a variety of recreational activities in the area and in the high turnover of the retail industry.

Figure 21: Characteristics of UI Claims by Occupation - April 2013



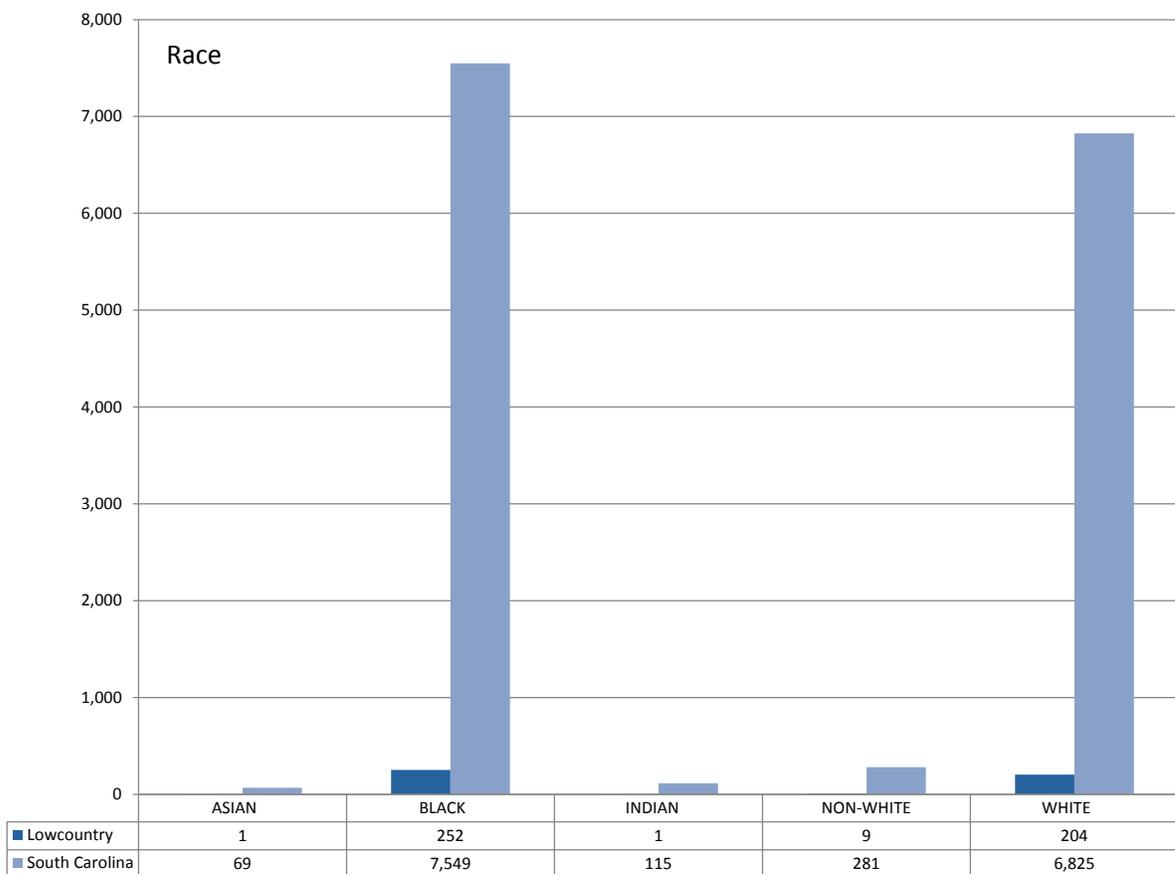
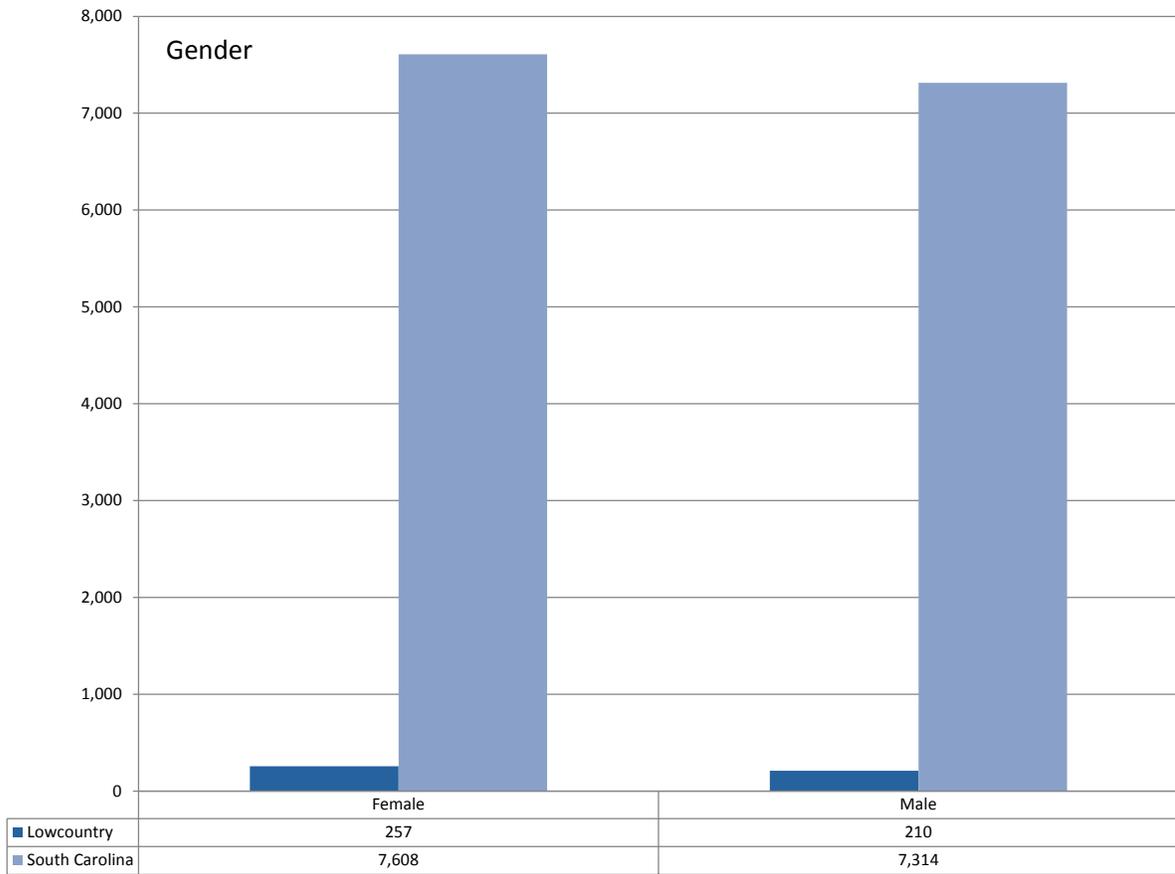
Occupation	Lowcountry	South Carolina
Accommodation and Food Services	77	1,321
Retail Trade	57	1,616
Health Care and Social Assistance	48	1,076
Construction	46	820
Administrative and Support and Waste Management	43	2,373
Transportation and Warehousing	30	414
Professional, Scientific, and Technical Services	20	698
Manufacturing	15	2,267
Wholesale Trade	14	445
Public Administration	14	206
Real Estate and Rental and Leasing	12	213
Other Services (except Public Administration)	10	292
Educational Services	9	222
Agriculture, Forestry, Fishing and Hunting	7	98
Finance and Insurance	7	300
Information	4	122
Utilities	2	22
Management of Companies and Enterprises	1	35
Arts, Entertainment, and Recreation	1	94

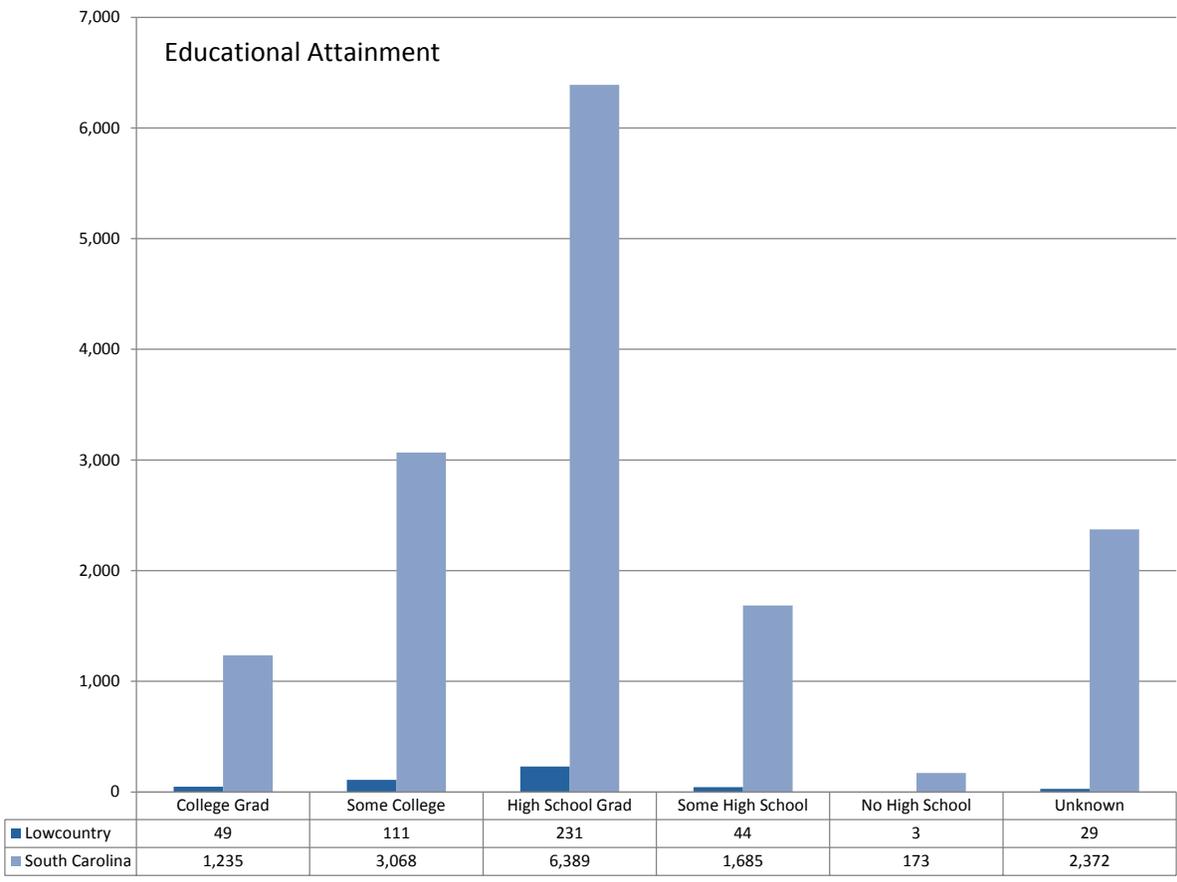
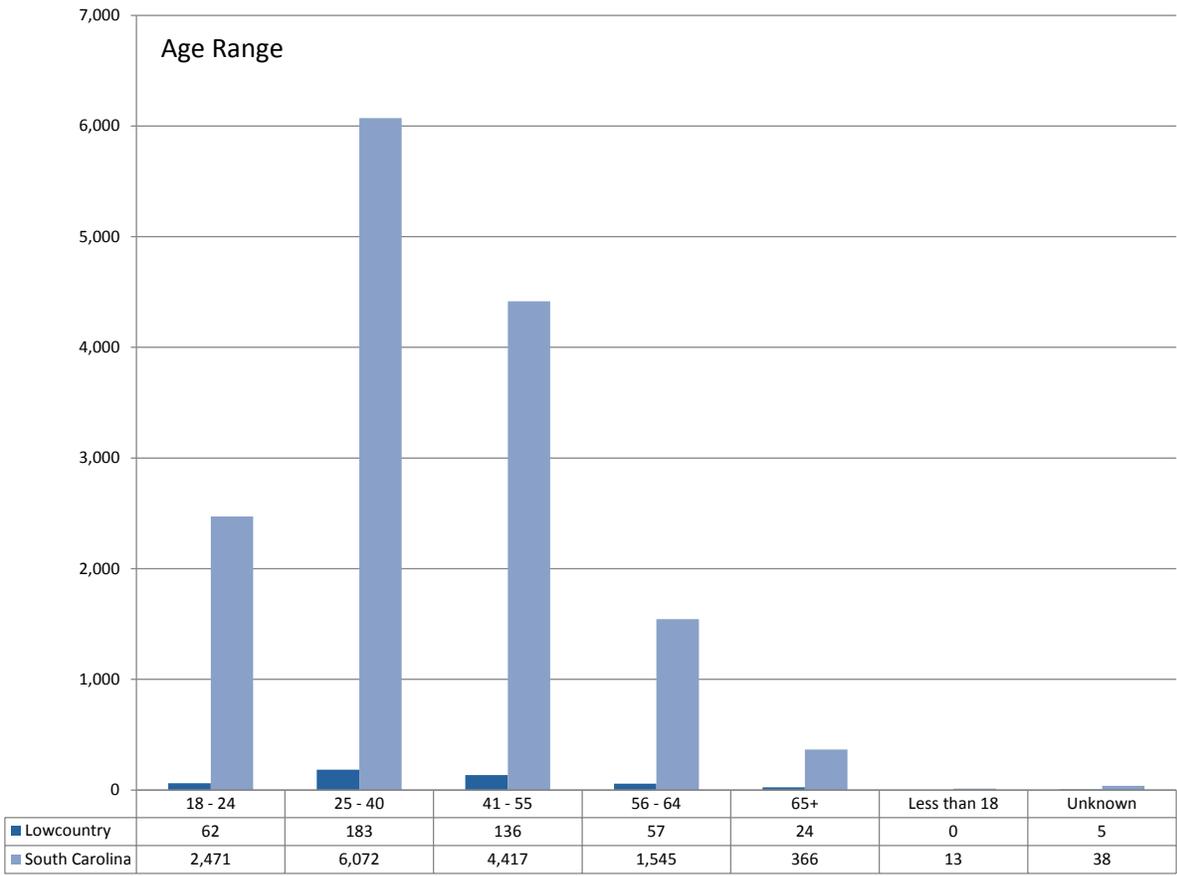
Source: SCDEW

UNEMPLOYMENT INSURANCE CLAIMANT CHARACTERISTICS

The people in this area who were receiving unemployment insurance benefits in April 2013 were typically female, black, 25-40 years old, and were high school graduates or earned a GED.

Figure 22: UI Claimant Characteristics - April 2013





Source: SCDEW

DEMAND: WHAT DO WE NEED?

Workforce demand shows what is needed in an area to support current and future employers. This section examines current (real-time) demand through online job advertisements, industry and occupational projections to 2018, educational requirements for future jobs, and the skills needed for those occupations.

Online job advertisements give a snapshot of what positions need to be filled in an area. The data is from the Conference Board Help Wanted OnLine® Data Series (HWOL) which measures the number of new and reposted job ads from over 16,000 Internet job boards. In February 2013, the largest occupational group with job ads in the Lowcountry LWIA was Healthcare Practitioners and Technical Occupations followed by Architecture and Engineering Occupations.

ONLINE JOB ADVERTISEMENTS

Figure 23: Lowcountry HWOL - February 2013 by Major Group

Occupation	# of Job Ads
Healthcare Practitioners and Technical Occupations	469
Architecture and Engineering Occupations	201
Sales and Related Occupations	179
Office and Administrative Support Occupations	135
Management Occupations	134
Food Preparation and Serving Related Occupations	115
Transportation and Material Moving Occupations	104
Computer and Mathematical Occupations	79
Healthcare Support Occupations	75
Installation, Maintenance, and Repair Occupations	73
Production Occupations	68
Business and Financial Operations Occupations	59
Education, Training, and Library Occupations	52
Miscellaneous	51
Protective Service Occupations	31
Building and Grounds Cleaning and Maintenance Occupations	29
Community and Social Services Occupations	27
Arts, Design, Entertainment, Sports, and Media Occupations	27
Construction and Extraction Occupations	26
Life, Physical, and Social Science Occupations	12
Personal Care and Service Occupations	8
Legal Occupations	7
Farming, Fishing, and Forestry Occupations	2

Note: A job advertisement may include multiple openings.

Source: The Conference Board Help Wanted OnLine® Data Series (HWOL)

INDUSTRY PROJECTIONS

The Health Care and Social Assistance industry is projected to have the largest increase in employment from 2008 to 2018, growing by 2,387 jobs or 239 jobs/year. This sector includes services such as ambulatory health care services, hospitals, nursing and residential care facilities, and social assistance services. The Agriculture, Forestry, Fishing, and Hunting category reports the next largest

growth with a projected 175 openings/year. This sector includes crop production; animal production; forestry and logging; fishing, hunting, and trapping; and related support activities.

Figure 24: Industry Projections - 2008-2018

Industry	Estimate Employment (2008)	Projected Employment (2018)	Change	Percent Change	Annual Percent Change
Total Employment, All Jobs	98,403	110,322	11,919	12.11	1.15
Health Care and Social Assistance	8,945	11,332	2,387	26.69	2.39
Agriculture, Forestry, Fishing and Hunting	4,227	5,979	1,752	41.45	3.53
Retail Trade	13,017	14,281	1,264	9.71	0.93
Accommodation and Food Services	13,616	14,846	1,230	9.03	0.87
Other Services (Except Government)	5,660	6,461	801	14.15	1.33
Administrative and Support and Waste Management and Remediation	4,645	5,408	763	16.43	1.53
Government	7,890	8,644	754	9.56	0.92
Real Estate and Rental and Leasing	2,899	3,418	519	17.90	1.66
Professional, Scientific, and Technical Services	3,013	3,512	499	16.56	1.54
Arts, Entertainment, and Recreation	2,500	2,916	416	16.64	1.55
Educational Services	6,393	6,770	377	5.90	0.57
Finance and Insurance	2,077	2,359	282	13.58	1.28
Wholesale Trade	1,290	1,445	155	12.02	1.14
Manufacturing	3,394	3,517	123	3.62	0.36
Information	937	1,009	72	7.68	0.74
Transportation and Warehousing	1,165	1,229	64	5.49	0.54
Management of Companies and Enterprises	486	541	55	11.32	1.08
Utilities	469	428	-41	-8.74	-0.91
Construction	7,106	7,005	-101	-1.42	-0.14

Source: BLS, SCDEW, QCEW, WI

OCCUPATIONAL PROJECTIONS

Many of the occupations projected to have numerous openings between 2008 and 2018 in this area support a growing economy. Healthcare occupations lead the projected employment listing with seven of the top ten positions, as shown in Figure 25.

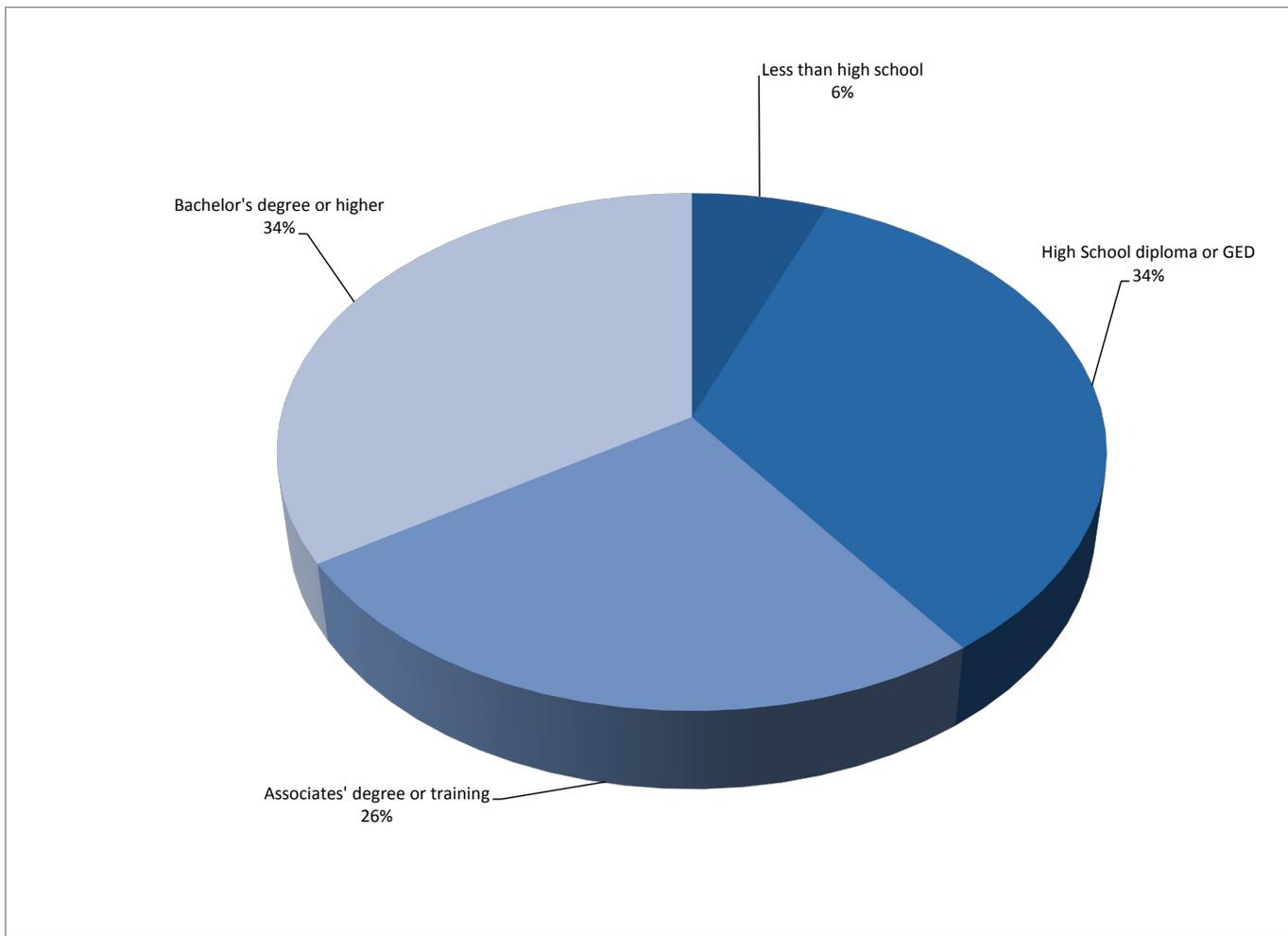
Figure 25: Growing Occupations - 2008-2018

Occupation	Estimated Employment (2008)	Projected Employment (2018)
Registered Nurses	1,300	1,663
Medical Assistants	397	548
Management Analysts	351	461
Physicians and Surgeons, All Other	317	413
Hairdressers, Hairstylists, and Cosmetologists	255	323
Pharmacy Technicians	242	319
Dental Hygienists	184	255
Physical Therapists	155	207
Dental Assistants	134	175
Public Relations Specialists	118	149
Personal Financial Advisors	108	143
Medical and Public Health Social Workers	106	139
Police, Fire, and Ambulance Dispatchers	108	138
Surgical Technologists	89	121
Welders, Cutters, Solderers, and Brazers	61	83
Diagnostic Medical Sonographers	54	71
Urban and Regional Planners	43	54
Respiratory Therapists	42	53
Physical Therapist Assistants	31	43
Cardiovascular Technologists and Technicians	28	38

Source: BLS, SCDEW, OES, WI

Of the top 50 projected growing occupations by percent change, 17 require a high school diploma or GED, three require less than a high school diploma, 17 require a bachelor's degree or higher, and 13 need an associate's degree or require some kind of postsecondary vocational training. All of the three requiring less than a high school diploma or GED do require short-term on-the-job training (OJT), which is defined by the US Department of Labor as less than one month.

Figure 26: Education for Top 50 Projected Occupations



Source: BLS, SCDEW, OES, WI

It is just as important to know which occupations are declining in the area. Declines are often due to technological advances (i.e. computers or robots replacing humans), so many of the declining occupations are projected to be manual labor jobs, as shown in Figure 27.

Figure 27: Top 20 Projected Declining Occupations in Lowcountry - 2008-2018

Occupation
Brickmasons and Blockmasons
Carpenters
Cement Masons and Concrete Finishers
Data Entry Keyers
Electricians
File Clerks
Helpers--Production Workers
Human Resources Assistants, Except Payroll
Inspectors, Testers, Sorters, Samplers & Weighers
Logging Equipment Operators
Mail Clerks and Mail Machine Operators
Order Clerks
Painters, Construction and Maintenance
Payroll and Timekeeping Clerks
Postal Service Clerks
Postal Service Mail Sorters, Processors
Postmasters and Mail Superintendents
Roofers
Sewing Machine Operators
Switchboard Operators, Including Answering Service

Source: BLS, SCDEW, OES, WI

SKILLS OF PROJECTED OCCUPATIONS

Using the top 50 projected growing occupations by percent change, the skill levels needed for the future workforce based on the definitions given earlier in this report can be categorized.

Figure 28: Skill Levels

Low	9
Middle	24
High	17

Source: BLS, SCDEW, OES, WI

Low-skilled jobs often have commensurate (i.e. low) pay and do not require much education, experience, or OJT. Does the supply of workers have the right skills for the jobs in the future?

WORKFORCE CHALLENGES

The current economic situation in the Lowcountry LWIA, the supply of workers, and the characteristics of workers who will be in demand has been reviewed. What can be gleaned from these findings? Are there gaps between supply and demand?

Supply Findings

Although the population should grow steadily to 2030, a smaller-than-the-state share of 25-54 year olds in their prime working age, this area looks to have a challenge in having a proper mix of workers. On the plus side, in-migration from other states/countries adds a notable number of residents at the top end of the educational spectrum. The LWIA has a higher percent of residents aged 25 and older with at least a bachelor's degree than the state does as a whole.

Many high school students selected the Health Science career cluster in keeping with state trends. The next most popular career cluster was Arts, Audio/Video/Technology, and Communications.

Demand Findings

Employer demand was consistent between online advertisements (current) and 2018 projected occupations (long-term needs) in general. Both had the need for workers in Marketing, Sales, and Service; Business, Management, and Administration; Hospitality and Tourism; and Health Science. Most of the top projected occupations require at least a high school diploma or GED.

Figure 29: Comparison of Supply and Demand

	Demand		Supply	
	Top online ads	Projected Occupations	Degrees Earned	Career Clusters Selected
Agriculture, Food and Natural Resource	1.8	6.2	0.0	1.9
Architecture and Construction	5.6	5.4	10.5	3.0
Arts, Audio/Video Technology and Communications	1.7	1.0	0.9	16.8
Business, Management and Administration	12.6	14.6	15.7	13.3
Education and Training	3.1	5.5	10.8	11.8
Finance	3.9	2.3	0.0	0.9
Government and Public Administration	0.1	0.3	0.0	3.9
Health Science	21.5	8.5	25.0	18.6
Hospitality and Tourism	10.9	16.8	4.0	3.5
Human Service	6.7	7.5	8.5	4.4
Information Technology	2.9	0.3	1.5	3.0
Law, Public Safety, Corrections and Security	2.1	4.7	3.9	4.3
Manufacturing	1.8	1.3	15.0	1.4
Marketing, Sales and Service	19.3	19.9	0.0	0.9
Science, Technology, Engineering and Mathematics	0.8	0.3	4.0	9.9
Transportation, Distribution, and Logistics	5.4	5.5	0.0	2.3

Source: BLS, SCDEW, WI, SC Department of Education, OES, HWOL

A few observations about the comparison that could be considered challenges to the workforce pipeline include:

- There are many post-secondary degrees being earned by area graduates in Architecture and Construction; Education and Training; and Manufacturing that exceed short-term demand in the LWIA.
- There is an overabundance of Arts, Audio/Video Technology and Communication; Health Science; STEM; and Education clusters selected by students that will far outpace the LWIA's long-term demand.
- The short- and long-term demand for workers in Marketing, Sales and Service and Hospitality and Tourism is not projected to be met by today's area graduates or students.
- There are more open jobs than graduates to fill them in Transportation, Distribution, and Logistics as well as more projected jobs than students choosing Agriculture, Food and Natural Resources careers.

There is always a demand for employees with soft skills. It is said that hard skills (training, degrees, or certification) get you hired, but soft skills get you fired. Many of our residents need to learn or get a refresher in soft skills in order to KEEP their jobs. Employers see the need.

Top 10 Soft Skills Found in Online Ads for South Carolina (April 2013)

1. Oral and written communication skills
2. Customer Service Oriented
3. Problem solving
4. Detail oriented
5. Microsoft Office
6. Self-starting / Self-motivated
7. Organizational skills
8. Troubleshooting
9. Work independently
10. Sales experience

Source: The Conference Board Help Wanted OnLine® Data Series (HWOL)

CONCLUSION

The Lowcountry LWIA area overall encompasses an economy dependent on tourism and its natural resources. The population continues to increase steadily, and the education level for the population is higher than the state as a whole with higher percentages of residents with bachelor's degree or higher. The workforce (current and potential) does face challenges in having the proper mix of employer demand being met by trained applicants. The majority of employers are advertising for jobs in health care; business and management; marketing and sales; and hospitality and tourism. However, some supply flows could be fine-tuned to be more in line with demand.

The data shows that:

- There is an undersupply of today's students choosing the fields of Hospitality and Tourism; Agriculture, Food and Natural Resources; and Marketing, Sales and Service to meet the LWIA's future employment demand.
- There is an oversupply of today's students choosing the areas of Arts, Audio/Video Technology and Communication; Education and Training; Science, Technology, Engineering and Mathematics; and Health Science that will far outpace the area's long-term demand.
- Comprehensive soft skills training is needed for all students and job seekers (high school, post-secondary, adult, new and returning entrants to the labor force, and incumbent workers) so that they can not only get hired but retain their positions and thus reduce employee turnover.

Getting education in line with the demands of employers will help the Lowcountry LWIA meet the challenges it faces.

LOWER SAVANNAH LWIA WORKFORCE REPORT 2012



The *Lower Savannah Workforce Report* is published by the Labor Market Information (LMI) Department of the South Carolina Department of Employment and Workforce. The information and analyses provided in this publication are based on data collected from sources throughout South Carolina and the United States.

About SC DEW and LMI:

The Labor Market Information Department compiles and publishes employment statistics, job forecasts, wage data, demographics, and other labor market information to help public and private organizations, researchers, and others better understand today's complex workforce.

The LMI Department produced this report under the leadership of:

Executive Director - Cheryl Stanton
Interim Deputy Assistant Executive Director - Kerry Paul
Labor Market Information Director - Brenda Lisbon

South Carolina Department of Employment and Workforce
1550 Gadsden Street
Columbia, South Carolina 29201
(803) 737-2660
www.dew.sc.gov
www.scworkforceinfo.com



TABLE OF CONTENTS

EXECUTIVE SUMMARY	VI
INTRODUCTION	VII
ECONOMIC DISCUSSION: A CURRENT PICTURE OF THE WORKFORCE	1
EMPLOYMENT BY INDUSTRY	1
LOCATION QUOTIENT	1
AVERAGE ANNUAL WAGE BY INDUSTRY	2
OCCUPATIONAL EMPLOYMENT	3
SKILLS DATA.....	4
EMPLOYMENT AND UNEMPLOYMENT	6
NEW STARTUP FIRMS	8
EMPLOYERS BY SIZE OF ESTABLISHMENT	9
SUPPLY: WHAT'S OUT THERE?	10
POPULATION BY AGE	10
POPULATION CHANGE AND MIGRATION	11
COMMUTING PATTERNS	12
EDUCATIONAL ATTAINMENT	12
CAREER CLUSTERS SELECTED BY HIGH SCHOOL STUDENTS	13
DEGREES AWARDED	15
CHARACTERISTICS OF UI CLAIMS BY OCCUPATION	16
UNEMPLOYMENT INSURANCE CLAIMANT CHARACTERISTICS.....	17
DEMAND: WHAT DO WE NEED?	20
ONLINE JOB ADVERTISEMENTS.....	20
INDUSTRY PROJECTIONS	20
OCCUPATIONAL PROJECTIONS	21
SKILLS OF PROJECTED OCCUPATIONS	24
WORKFORCE CHALLENGES	25
CONCLUSION	27

TABLE OF FIGURES

FIGURE 1: LOWER SAVANNAH LWIA EMPLOYMENT BY INDUSTRY - 3RD QUARTER 2012	1
FIGURE 2: NOTABLE LOWER SAVANNAH LWIA LOCATION QUOTIENTS - 2011	2
FIGURE 3: ANNUAL AVERAGE WAGE BY INDUSTRY - 3RD QUARTER 2012.....	3
FIGURE 4: TOP 20 OCCUPATIONS WITH WAGES - 2012.....	4
FIGURE 5: TOP OCCUPATIONS BY SKILL CLASSIFICATION - LOWER SAVANNAH 2012	5
FIGURE 6: EMPLOYMENT - 2002-2012.....	6
FIGURE 7: UNEMPLOYMENT - 2002-2012	7
FIGURE 8: ANNUAL UNEMPLOYMENT - 2002-2012	8
FIGURE 9: MONTHLY UNEMPLOYMENT RATE - MARCH 2011-APRIL 2013.....	8
FIGURE 10: NEW STARTUP FIRMS - 2007-2012.....	9
FIGURE 11: EMPLOYERS BY SIZE OF ESTABLISHMENT - 3RD QUARTER 2012.....	9
FIGURE 12: POPULATION BY AGE	10
FIGURE 13: POPULATION PROJECTIONS TO 2030.....	11
FIGURE 14: POPULATION MIGRATION - 2011 - 5-YEAR ESTIMATE.....	11
FIGURE 15: COMMUTING PATTERNS - 2010.....	12
FIGURE 16: EDUCATIONAL ATTAINMENT - LOWER SAVANNAH AND SOUTH CAROLINA 2011	12
FIGURE 17: EDUCATIONAL ATTAINMENT - LOWER SAVANNAH 2011.....	13
FIGURE 18: PERCENT OF STUDENTS DECLARING A CAREER CLUSTERS IN LOWER SAVANNAH AND SC - 2012.....	14
FIGURE 19: CAREER CLUSTERS - 2012.....	15
FIGURE 20: TOP 20 MAJORS IN LOWER SAVANNAH - 2011.....	16
FIGURE 21: CHARACTERISTICS OF UI CLAIMS BY OCCUPATION - APRIL 2013.....	17
FIGURE 22: UI CLAIMANT CHARACTERISTICS - APRIL 2013.....	18
FIGURE 23: LOWER SAVANNAH HWOL - APRIL 2013 BY MAJOR GROUP.....	20
FIGURE 24: INDUSTRY PROJECTIONS - 2008-2018	21
FIGURE 25: GROWING OCCUPATIONS - 2008-2018.....	22
FIGURE 26: EDUCATION FOR TOP 50 PROJECTED OCCUPATIONS	23
FIGURE 27: TOP 20 PROJECTED DECLINING OCCUPATIONS IN LOWER SAVANNAH - 2008-2018	24
FIGURE 28: SKILL LEVELS.....	24
FIGURE 29: COMPARISON OF SUPPLY AND DEMAND.....	25

EXECUTIVE SUMMARY

The employment leaders for Lower Savannah Local Workforce Investment Area (LWIA) are Manufacturing and Retail Trade. Employment growth is anticipated by 2018 in several industries, especially Retail Trade and Administrative and Support and Waste Management and Remediation Services. The highest wages are paid by the Professional, Scientific, and Technical as well as Administrative and Support and Waste Management and Remediation Services industries.

The LWIA's population grew by 4.5 percent from 2000 to 2010, and it has a higher portion of residents aged 50 to 69 and a lower portion of residents aged 25 to 44 than the state overall.

Employment is rising, and unemployment is declining; although, the LWIA has a current and historically higher unemployment rate than the state. Employment is concentrated in Aiken and Orangeburg, and over 6,600 more people leave the LWIA for work than enter it every day. Manufacturing is the largest industry represented in unemployment claims.

Lower Savannah has a higher proportion of residents with a high school education than the state does as a whole. However, 18.5 percent of residents do not have a high school diploma, and a lower percent of residents have postsecondary training than does the state overall. For projected growing jobs, 12 percent require no diploma, 44 percent require a diploma, 12 percent require an associate's degree or vocational training, and 32 percent require a bachelor's degree or higher.

Lower Savannah LWIA businesses desire a trained workforce with the current focus being on manufacturing-specific certifications, like Computer Numerical Control machining and welding. The advanced Manufacturing industry is having difficulty meeting its employee needs with Lower Savannah's contemporary workforce. Although many manufacturing firms are willing to train their workers, there exists a perception gap between current and former manufacturing techniques, opportunities, and environments.

Lower Savannah LWIA has several factors working in its favor. It has the larger cities of Aiken and Orangeburg that are the employment epicenters of the LWIA. Not only are several post-secondary educational and training institutions available, but they are being used more than ever. Bridgestone Tires made a \$1.2 billion investment in Aiken last year, showing its confidence in the area and its workforce.

The patterns and trends described in this report offer cause for both optimism and concern. Lower Savannah LWIA has an exciting future ahead of it, and it can lead the way in delivering the skilled talent and economic opportunities that businesses and workers in the area deserve.

INTRODUCTION

The Lower Savannah Local Workforce Investment Area is composed of Aiken, Allendale, Bamberg, Barnwell, Calhoun, and Orangeburg counties. It is located in the southwestern part of the state and was involved in the Revolutionary and Civil Wars. The Savannah River provides a natural border to the west. The Lower Savannah LWIA is home to South Carolina's youngest county (Allendale, 1919) and the Savannah River Site. The economic history of the area has been dominated by agriculture and railroads, with recent strengths in the manufacturing industry.

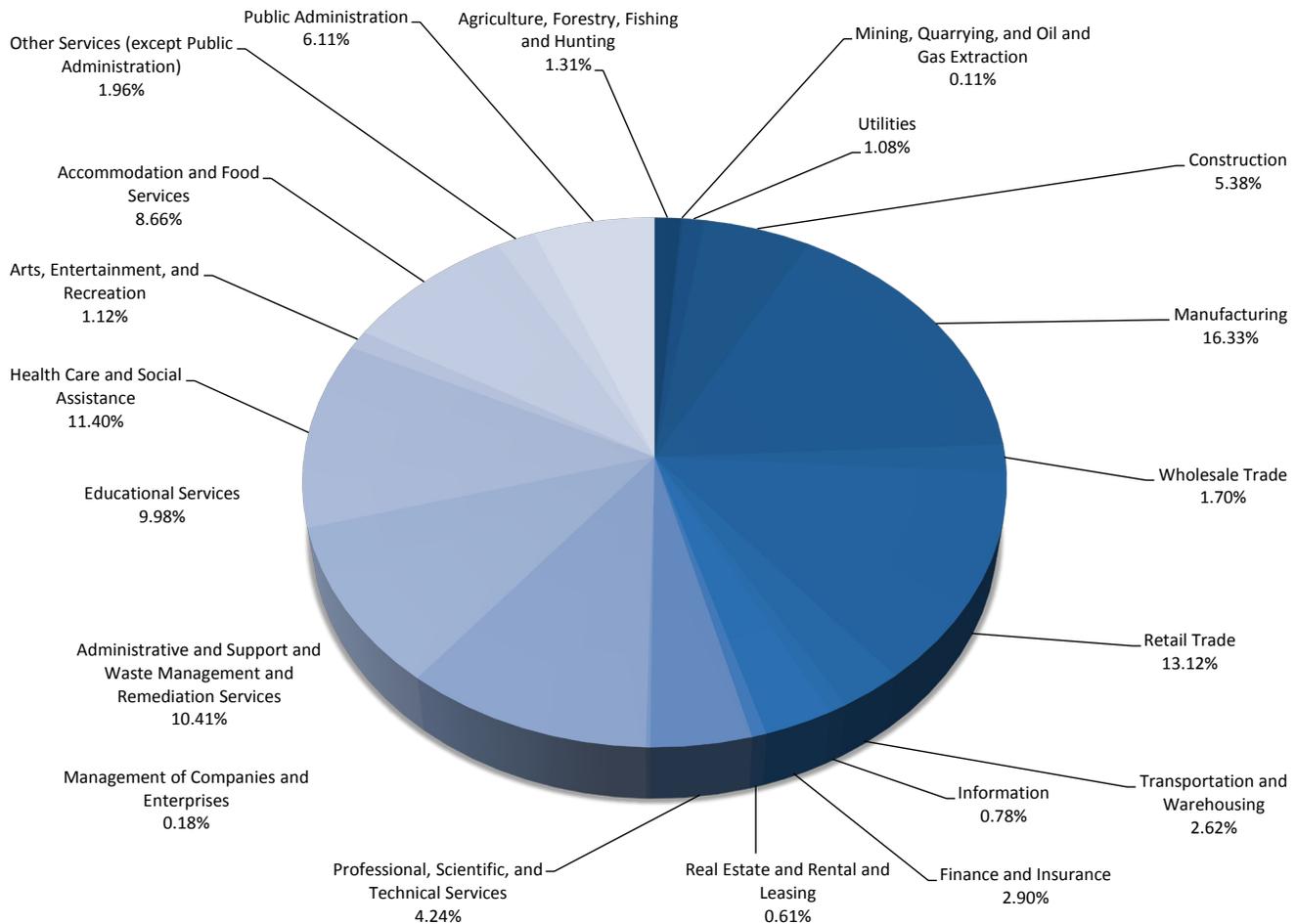
The economic changes this year in the Lower Savannah LWIA demonstrate the shifting needs of employers and employees. Cultivating an understanding of the workforce allows all six counties to respond to anticipated future needs. Analyses help to identify the gap between what the workforce has in the way of talent and skills (supply), and what it may need in the future (demand).

The purpose of the Lower Savannah LWIA Workforce Report is to present a comprehensive view of the status of Lower Savannah counties' economy and workforce. The report includes an analysis of Lower Savannah LWIA's workforce, industries, economic climate, and factors that will affect all three. Forecasts will be made for the workforce, industries, and the economy.

ECONOMIC DISCUSSION: A CURRENT PICTURE OF THE WORKFORCE

EMPLOYMENT BY INDUSTRY

Figure 1: Lower Savannah LWIA Employment By Industry - 3rd Quarter 2012



Source: Bureau of Labor Statistics (BLS), SC Department of Employment & Workforce (SCDEW), Quarterly Census of Employment and Wages (QCEW)

The Manufacturing and Retail Trade industries employ many workers in the Lower Savannah LWIA and have had many gains and losses in the past several years, reflecting the national trend towards austerity and outsourcing. Industries like Education Services and Administrative and Support and Waste Management and Remediation Services are healthy and flourishing, while others like Utilities are anticipated to slowly decline. The 2010 per capita income for a Lower Savannah LWIA resident is \$28,899, which is up 39 percent from 2000.¹

LOCATION QUOTIENT

A location quotient (LQ) is a useful tool for determining the concentration of workers in a given area. Location quotients compare the regional share of employment in a particular industry to the national share of employment in the same industry. The resulting quotient reveals the degree of regional specialization or concentration in an industry and provides insight into what makes the area unique in comparison to the national average. An LQ of 1.0 means the concentration of jobs in that industry matches the nation's value. Location quotients higher than 1.0 indicate the level of specialization the area has in particular sectors. Lower quotients can indicate a possible area that could be expanded.

Figure 2: Notable Lower Savannah LWIA Location Quotients - 2011

Industry and Sectors	Location Quotient
<i>Aiken County</i>	
Textile Mills	10.4
Plastics and Rubber Product Manufacturing	4.4
Administrative and Waste Services	2.9
<i>Allendale County</i>	
Wood Product Manufacturing	79.1
Forestry and Logging	45.2
Chemical Manufacturing	11.3
<i>Bamberg County</i>	
Forestry and Logging	41.9
Wood Product Manufacturing	11.1
Utilities	7.3
<i>Barnwell County</i>	
Manufacturing	3.3
Agriculture and Forestry Support Activities	2.4
Health and Personal Care Stores	2.2
<i>Calhoun County</i>	
Chemical Manufacturing	21.4
Agriculture and Forestry Support Activities	14.1
Heavy and Civil Engineering Construction	7.5
<i>Orangeburg County</i>	
Forestry and Logging	9.8
Nonmetallic Mineral Product Manufacturing	3.2
Wood Product Manufacturing	2.6

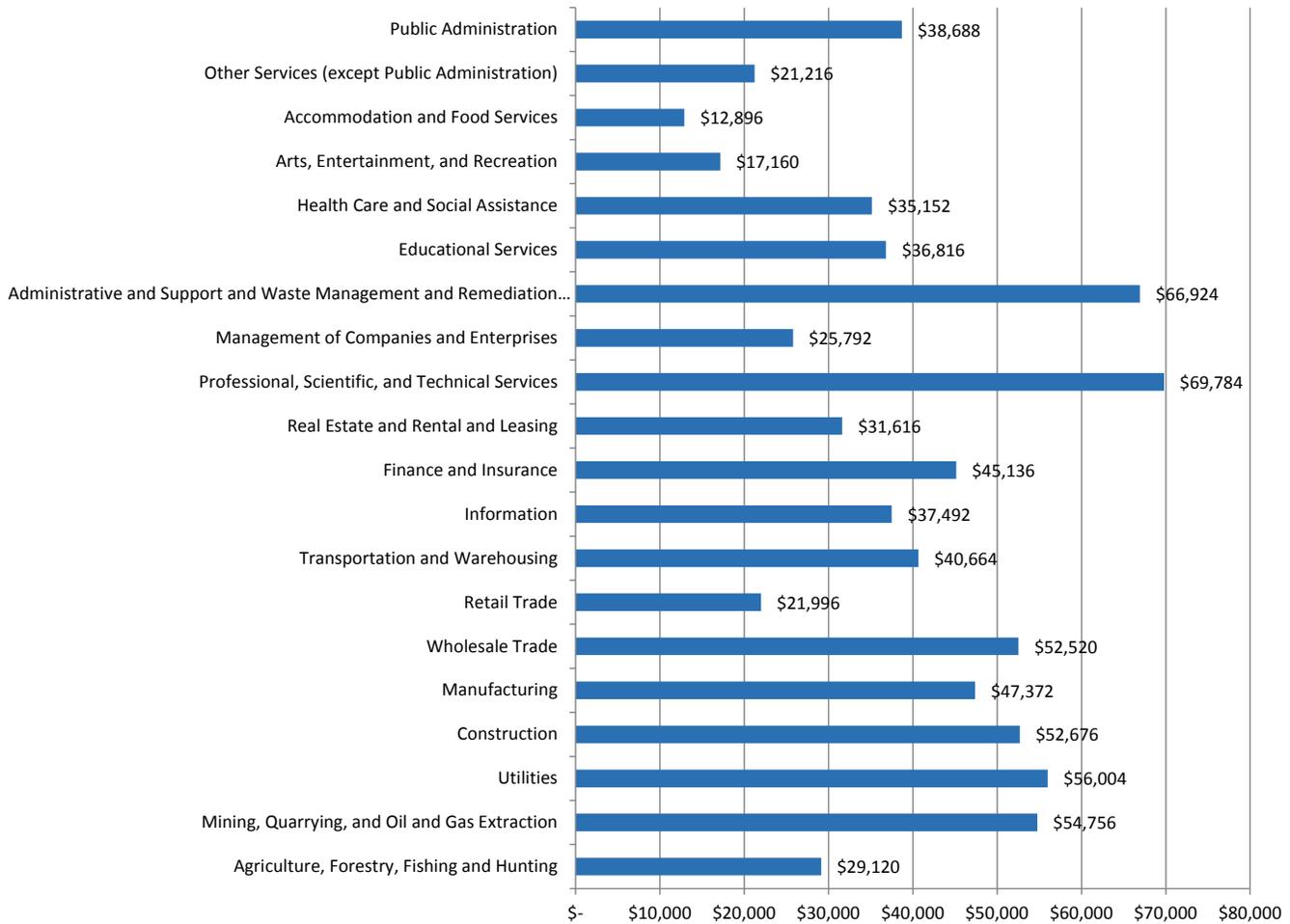
Source: US Department of Labor, Bureau of Labor Statistics - http://data.bls.gov/location_quotient

Wood Product Manufacturing, Forestry and Logging, and Chemical Manufacturing are at the top of the list of the most concentrated industries in this area with location quotients above 10 in several counties. Textile Mills and Agriculture and Forestry Support Activities also stand out as highly-focused sectors.

AVERAGE ANNUAL WAGE BY INDUSTRY

The annual wages for Professional, Scientific, and Technical workers are usually among the highest for any LWIA industry. These workers usually require at least a bachelor’s degree. Having an education is an excellent way to enter a high-wage industry and have more options for employment. Utility workers have a wide range of education (high school diploma to PhD) and tend to stay in their jobs for a very long time, which increases the average wage as small raises accumulate over time. The second highest paying industry is Administrative and Support and Waste Management and Remediation Services. This sector includes office administrative services, facilities support services, employment services, services to buildings and dwellings, and waste collection, treatment, and disposal services.

Figure 3: Annual Average Wage by Industry - 3rd Quarter 2012



Source: BLS, SCDEW, QCEW

OCCUPATIONAL EMPLOYMENT

When examining the current occupational employment in the area, one can observe that some of the top 20 occupations are low-skill, low-pay jobs. These jobs, like Cashiers, Waiters and Waitresses, and Janitors, have high turnover. These are not necessarily the most robust jobs as far as wages, but they are jobs.

Figure 4 lists occupations, like Registered Nurses, Elementary School Teachers, and First-Line Supervisors, that pay a higher wage. Manufacturing, Retail Trade, and Healthcare comprise nearly 41 percent of the employment in the Lower Savannah LWIA, reflected in this list of top occupations: Team Assemblers, Retail Salespersons, and Registered Nurses.

Figure 4: Top 20 Occupations with Wages - 2012

Occupational Title	Total Employment	Hourly Average Wage (\$)
All Occupations	55,600	16.37
Team Assemblers	2,340	13.52
Cashiers	1,970	8.66
Retail Salespersons	1,800	10.42
Combined Food Preparation and Serving Workers, Including Fast Food	1,740	8.54
Slaughterers and Meat Packers	1,520	12.93
Registered Nurses	1,170	21.27
Heavy and Tractor-Trailer Truck Drivers	1,120	14.91
Maintenance and Repair Workers, General	1,070	17.83
Secretaries and Administrative Assistants, Except Legal, Medical, and Executiv	1,030	13.95
Customer Service Representatives	930	12.18
Stock Clerks and Order Fillers	910	12.41
Janitors and Cleaners, Except Maids and Housekeeping Cleaners	880	9.41
Laborers and Freight, Stock, and Material Movers, Hand	880	10.99
Food Batchmakers	750	12.74
Office Clerks, General	740	10.70
Waiters and Waitresses	690	8.47
First-Line Supervisors of Production and Operating Workers	650	29.06
First-Line Supervisors of Retail Sales Workers	620	17.71
Elementary School Teachers, Except Special Education	600	22.83
Cooks, Fast Food	600	8.21

Source: BLS, SCDEW, Occupational Employment Statistics (OES)

SKILLS DATA

Employers are beginning to see that a person’s skills, in addition to their education, may help in determining who to hire. Many times the degree is not as important as the skills gained through specialized training and/or experience. In order to be able to determine the current level of skills in the area, the top 50 current occupations by employment are presented, and assigned a low, middle, or high skill designation to that occupation. The definitions for those skills levels are:

- **LOW:** No high school or GED, or high school/GED with less than one year experience and no on-the-job-training (OJT), or short-term OJT
- **MIDDLE:** High school/GED with one year experience, or moderate OJT, or long-term OJT, or apprenticeship, or postsecondary vocational training, or some college, or Associate’s Degree, or less than a Bachelor’s Degree
- **HIGH:** Bachelor’s Degree or higher

In the Lower Savannah area, 24 of the top 50 jobs in 2012 are considered low-skill jobs. Twenty-two are middle skill, and four are high-skill occupations.

Figure 5: Top Occupations By Skill Classification - Lower Savannah 2012

Skillset: LOW
Cashiers
Combined Food Preparation and Serving Workers, Including Fast Food
Construction Laborers
Cooks, Fast Food
Cooks, Institution and Cafeteria
Cooks, Restaurant
Customer Service Representatives
Food Batchmakers
Home Health Aides
Industrial Truck and Tractor Operators
Janitors and Cleaners, Except Maids and Housekeeping Cleaners
Laborers and Freight, Stock, and Material Movers, Hand
Landscaping and Groundskeeping Workers
Light Truck or Delivery Services Drivers
Maids and Housekeeping Cleaners
Office Clerks, General
Personal Care Aides
Retail Salespersons
Secretaries and Administrative Assistants, Except Legal, Medical, and Executive
Slaughterers and Meat Packers
Stock Clerks and Order Fillers
Teacher Assistants
Tellers
Waiters and Waitresses
Skillset: MIDDLE
Automotive Service Technicians and Mechanics
Bookkeeping, Accounting, and Auditing Clerks
Coating, Painting, and Spraying Machine Setters, Operators, and Tenders
Correctional Officers and Jailers
Emergency Medical Technicians and Paramedics
First-Line Supervisors of Food Preparation and Serving Workers
First-Line Supervisors of Mechanics, Installers, and Repairers
First-Line Supervisors of Office and Administrative Support Workers
First-Line Supervisors of Production and Operating Workers
First-Line Supervisors of Retail Sales Workers
General and Operations Managers
Heavy and Tractor-Trailer Truck Drivers
Industrial Machinery Mechanics
Inspectors, Testers, Sorters, Samplers, and Weighers
Maintenance and Repair Workers, General
Nursing Assistants
Police and Sheriff's Patrol Officers
Registered Nurses
Sales Representatives, Wholesale and Manufacturing, Except Technical and Scientific Products
Substitute Teachers
Team Assemblers
Welders, Cutters, Solderers, and Brazers
Skillset: HIGH
Accountants and Auditors
Elementary School Teachers, Except Special Education
Middle School Teachers, Except Special and Career/Technical Education
Secondary School Teachers, Except Special and Career/Technical Education

Source: BLS, SCDEW, OES, Workforce Intelligence (WI)

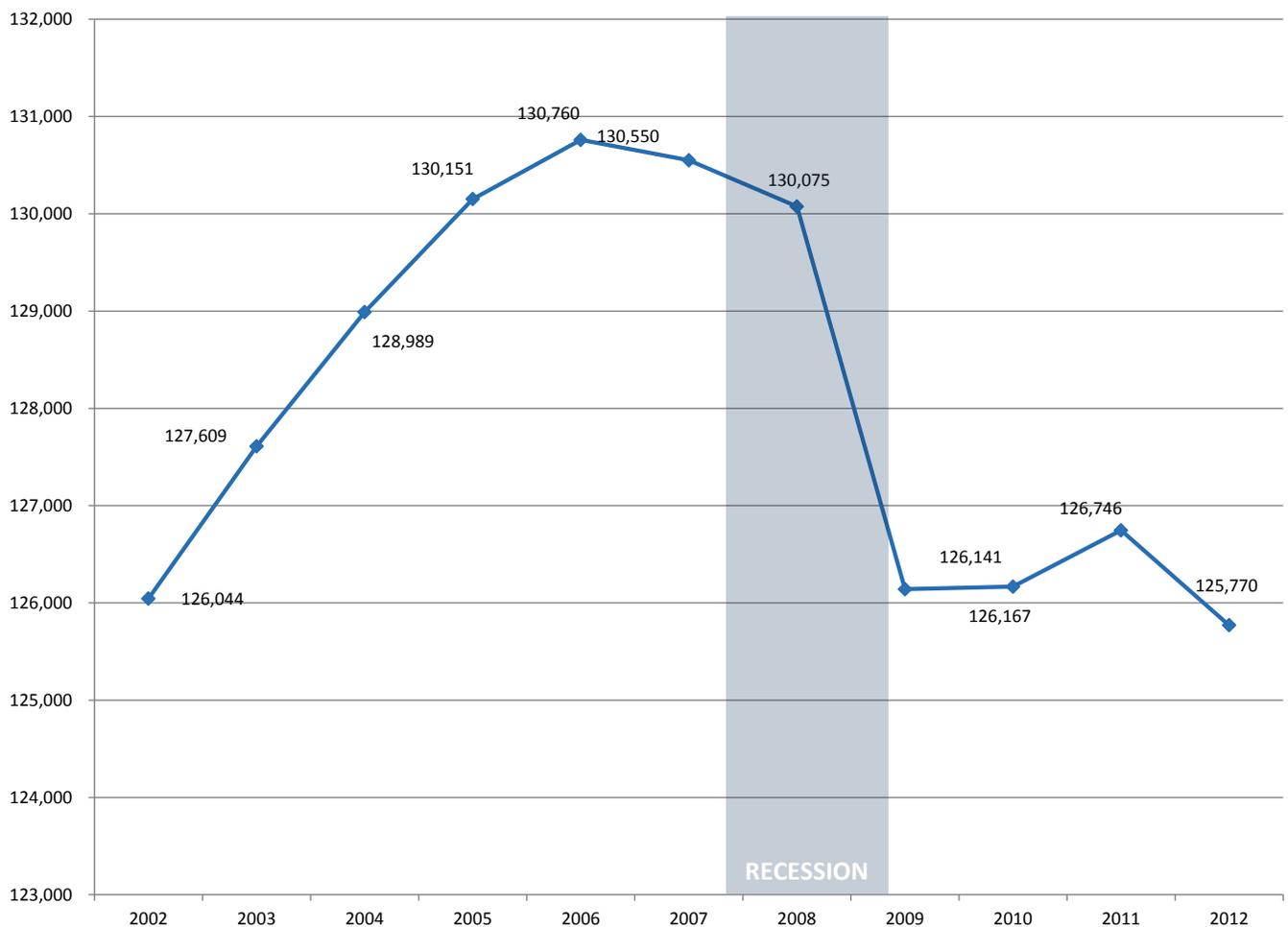
EMPLOYMENT AND UNEMPLOYMENT

A crucial indicator of the health of a workforce is its labor force levels. Labor force data count residents who are employed and unemployed. There are a few Federal definitions that will make discussion of the labor force a little easier to understand.

- Employed: Persons 16 years old or older who worked for pay any time during the week that includes the 12th of the month
- Unemployed: Persons 16 years old or older who are not working but want a job, and are able and willing to work
- Labor Force: Employed plus unemployed
- Unemployment Rate: Unemployment divided by labor force

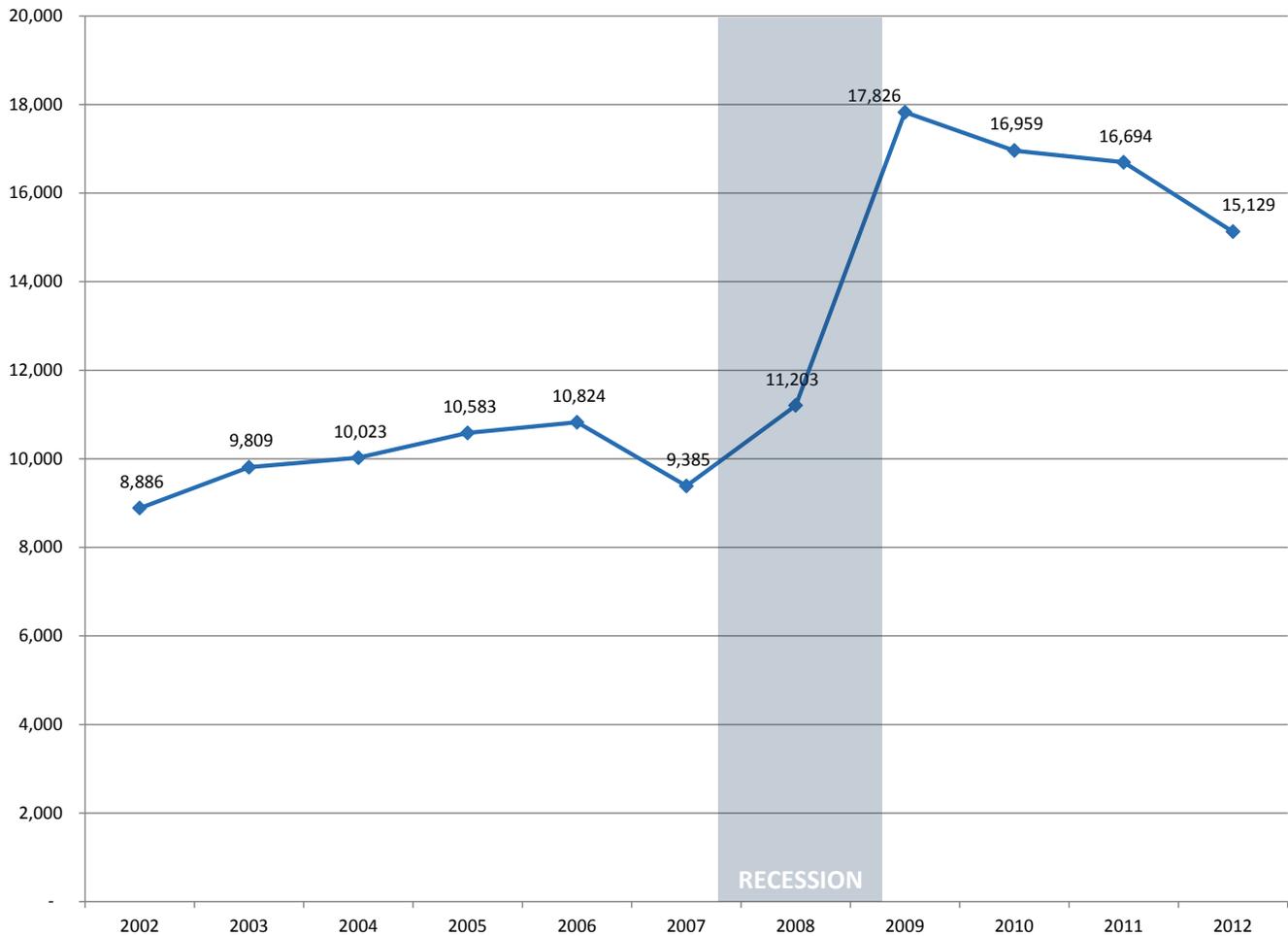
In Figure 6, the recession (officially from December 2007 through June 2009) had a great effect on the labor force. Employment dropped, and unemployment increased by 90 percent.

Figure 6: Employment - 2002-2012



Source: BLS, SCDEW, Local Area Unemployment Statistics (LAUS)

Figure 7: Unemployment - 2002-2012

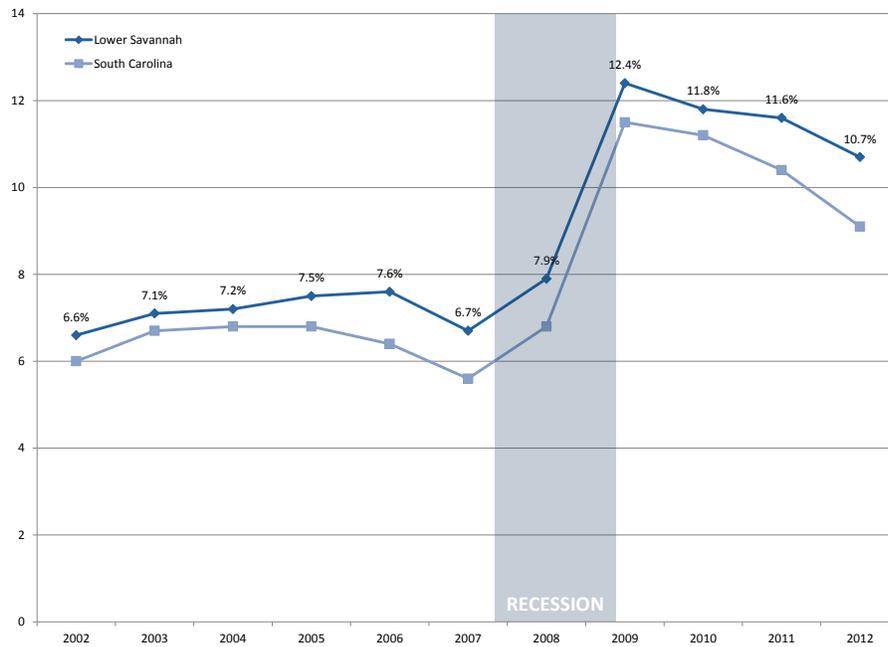


Source: BLS, SCDEW, LAUS

Tracking annual unemployment rates give a good snapshot of the state of an area’s workforce. Annual rates smooth out the usual ups and downs of a month-to-month rate (due to normal seasonal or cyclical changes) to give a more accurate picture.

Figure 8 shows the annual rates for the Lower Savannah LWIA area and South Carolina. From 2002 Lower Savannah was consistently above the state’s rate. During the recession, the Lower Savannah rate almost doubled from 6.7 percent in 2007 to 12.4 percent in 2009.

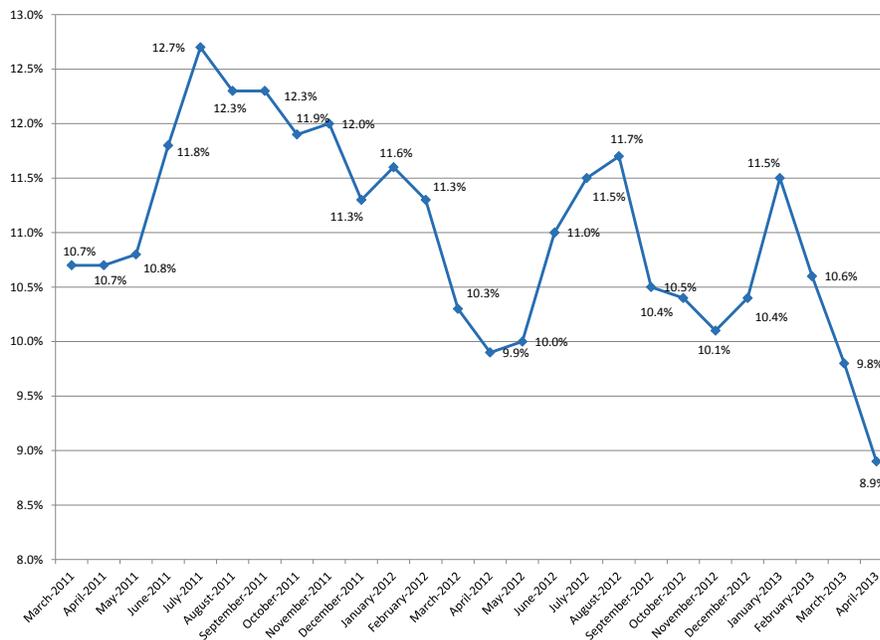
Figure 8: Annual Unemployment - 2002-2012



Source: BLS, SCDEW, LAUS

Figure 9 illustrates that the monthly unemployment rate has seen wide fluctuations since March 2011. The area seems to be slowly recovering from the recession.

Figure 9: Monthly Unemployment Rate - March 2011-April 2013



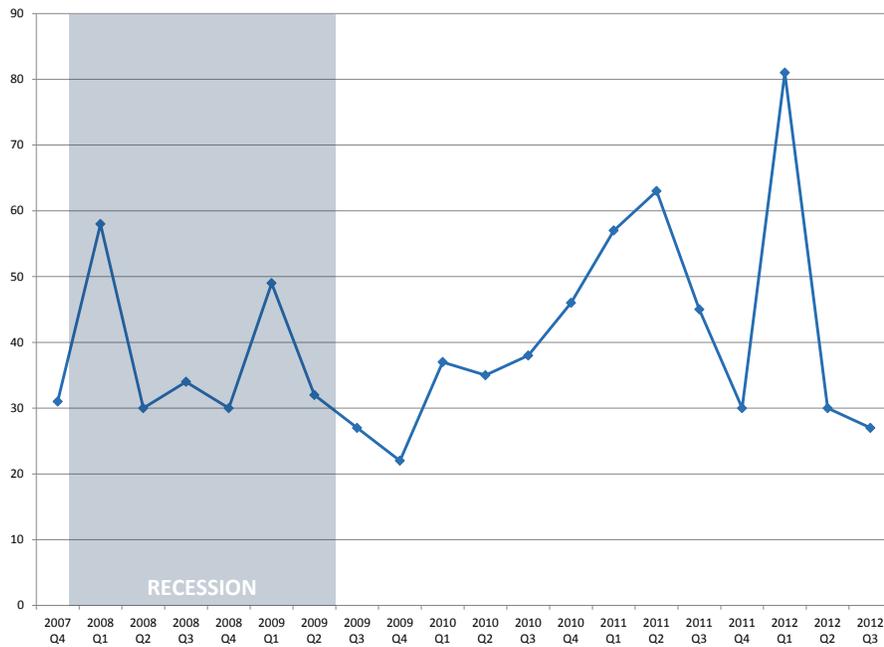
Source: BLS, SCDEW, LAUS

NEW STARTUP FIRMS

One way to see if an economy is improving is to examine data about startup firms. An increase in new companies might be an indicator of expansion in the area, whereas a drop in new firms shows a lack of confidence in the future. (Note: There is almost always a spike in startups in the first quarter

of the year.) Again, the recession had a major impact on normal business births and deaths. The number of startups has been fluctuating since the recession in the area with a large increase in early 2012.

Figure 10: New Startup Firms - 2007-2012



Source: BLS, SCDEW, QCEW

EMPLOYERS BY SIZE OF ESTABLISHMENT

By far, the largest category of business size in the area is small business. Small businesses (or establishments) in South Carolina are defined as companies employing 49 or fewer people. The Lower Savannah LWIA has 94 percent of establishments designated as small businesses, and South Carolina has 93 percent.

Small businesses may need more support and assistance than larger companies because they may not have a designated human resources department or person. They may rely on other resources, such as SC Works Centers, for help with hiring, training, or screening job candidates.

Figure 11: Employers by Size of Establishment - 3rd Quarter 2012

Employees	Lower Savannah	South Carolina
0 to 4	2,868	63,766
5 to 9	1,141	19,667
10 to 19	735	13,316
20 to 49	486	9,881
50 to 99	180	3,907
100 to 249	112	2,433
250 to 499	28	757
500 to 999	11	328
1000 +	10	264

Source: BLS, SCDEW, QCEW

SUPPLY: WHAT'S OUT THERE?

A manufacturing assembly line needs to have resources and supplies on-hand so that the line does not have to stop. The same is true for the workforce. The supply of workers needs to be of the right quantity and quality to do the job. Is the supply of workers in line with what the companies in the Lower Savannah LWIA need? Seven streams of workforce supply provide an indication: population, commuting, education of the population, clusters of high school students, awards earned at higher education institutions, and characteristics of unemployment insurance claims and claimants.

POPULATION BY AGE

Age distribution in the area is similar to the state and the country with two exceptions. In the 25-44 age cohorts, Lower Savannah has a notably lower proportion of population than the state or nation, and in the 50-69 age cohorts, the LWIA has a markedly higher proportion of population.

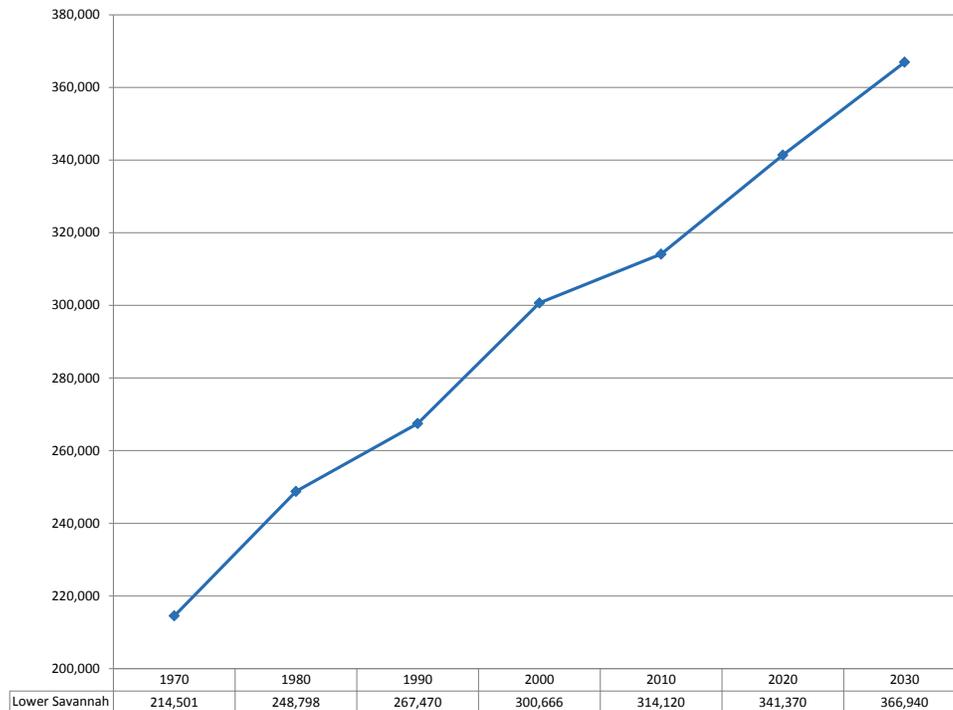
Figure 12: Population by Age

Age Range	Lower Savannah	SC	US
0-4	6.3%	6.5%	6.6%
5-9	6.1%	6.4%	6.6%
10-14	6.6%	6.5%	6.7%
15-19	7.5%	7.2%	7.2%
20-24	6.9%	7.2%	7.0%
25-29	6.1%	6.6%	6.8%
30-34	5.4%	6.2%	6.4%
35-39	5.8%	6.5%	6.6%
40-44	6.3%	6.8%	7.0%
45-49	7.4%	7.2%	7.4%
50-54	7.5%	7.0%	7.2%
55-59	7.2%	6.5%	6.3%
60-64	6.0%	5.9%	5.3%
65-69	5.1%	4.5%	3.9%
70-74	3.4%	3.3%	3.0%
75-79	2.6%	2.5%	2.4%
80-84	2.1%	1.7%	1.9%
85 and older	1.7%	1.5%	1.7%

Source: US Bureau of Census, American Community Survey (ACS)

POPULATION CHANGE AND MIGRATION

Figure 13: Population Projections to 2030



Source: US Census Bureau, Census 2000, SC Department of Health and Environmental Control - Vital Records Department. Population projections calculated by SC Budget and Control Board, Office of Research and Statistics

Figure 14: Population Migration - 2011 - 5-Year Estimate

	Total	Moved From Different State	Moved From Abroad	Moved From Different County	Moved Within Same County
Population 1 year and over	311,408	2.4%	0.2%	1.9%	6.0%
Hispanic or Latino origin (of any race)	10,113	5.5%	1.1%	2.7%	10.3%
White alone, not Hispanic or Latino	165,818	2.4%	0.1%	1.4%	5.3%
Population 25 Years and Over					
Less than high school graduate	38,997	1.4%	0.1%	2.1%	6.9%
High school graduate/GED	71,983	1.6%	0.1%	1.4%	4.7%
Some college or associate's degree	56,642	2.4%	0.2%	0.9%	5.2%
Bachelor's degree	26,884	2.6%	0.2%	0.9%	3.2%
Graduate or professional degree	15,438	3.3%	0.6%	0.9%	3.2%

Source: US Census Bureau, ACS, SCDEW

After a notable jump in population from 1990 to 2000 (up 12.4 percent), the growth of the population of this area slowed down, growing just 4.5 percent over the next 10 years. Growth is projected to increase less than 1 percent per year to 2030. In-migration (people moving into Lower Savannah) shows that nearly 4 percent of residents holding a graduate degree moved from out of state. While 10.5 percent of the population changed residence, only 2.6 percent came from outside of South Carolina. More than double the proportion of Hispanics moved from out of state than did Whites.

COMMUTING PATTERNS

Most of the workers (66 percent) of Lower Savannah live and work in the LWIA. The table in Figure 15 shows that over 21,000 workers commute in from other areas to work in the LWIA. Richmond County in Georgia draws a sizeable portion of Lower Savannah County's residents out of the area to work. Over 6,600 more employees commute out of the area every day than enter into work.

Figure 15: Commuting Patterns - 2010

To Lower Savannah From	21,786	From Lower Savannah To	28,398
Richmond County, GA	5,847	Richmond County, GA	10,388
Columbia County, GA	4,021	Richland County, SC	4,470
Edgefield County, SC	3,377	Lexington County, SC	3,698
Lexington County, SC	2,158	Columbia County, GA	1,664
		Edgefield County, SC	1,208

Source: US Census Bureau, ACS

EDUCATIONAL ATTAINMENT

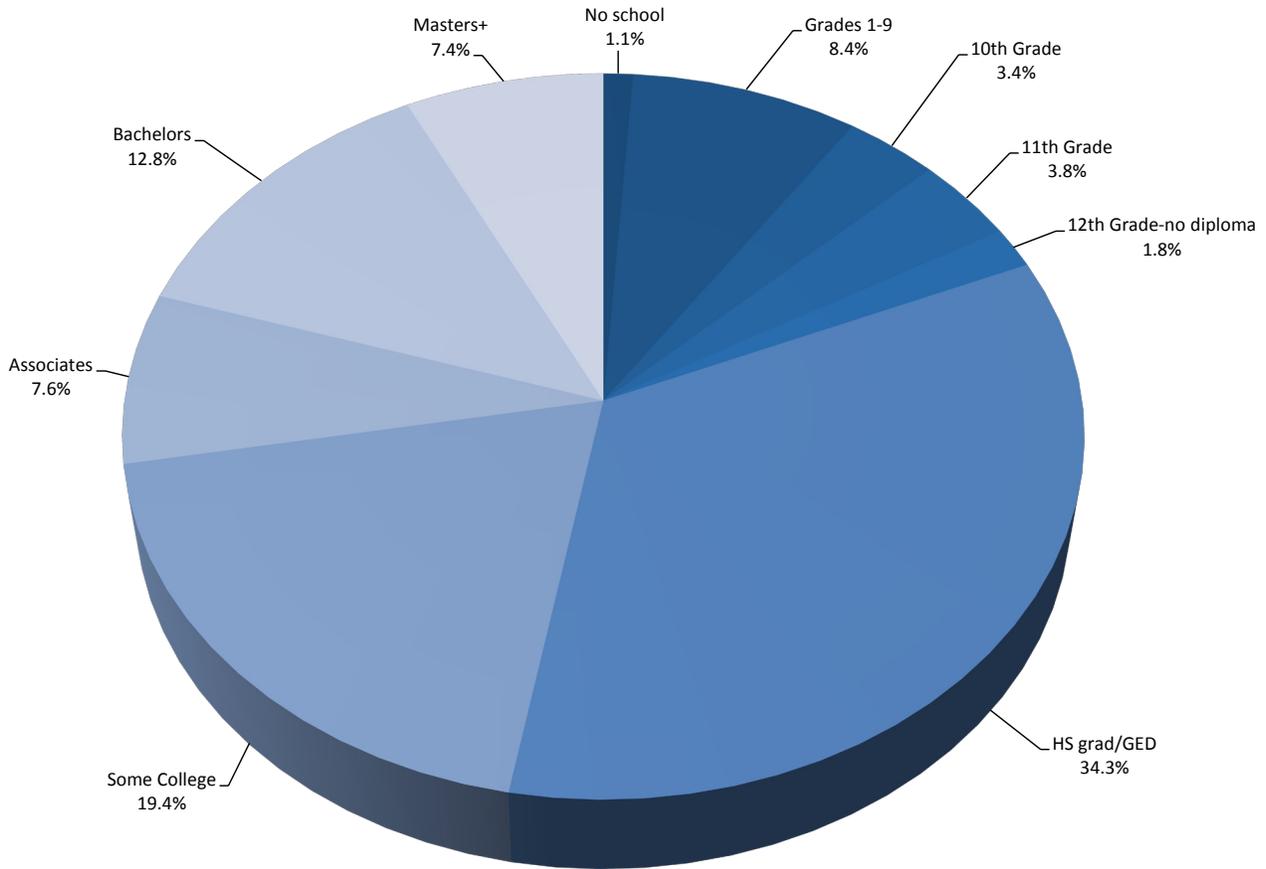
The Lower Savannah LWIA area has a lower percent of residents with higher-level degrees than the state as a whole. The Lower Savannah LWIA has a more than 3 percent higher concentration of residents with a high school diploma or GED than the state. However, the Lower Savannah LWIA has a higher percent of residents with less than a high school diploma or GED.

Figure 16: Educational Attainment - Lower Savannah and South Carolina 2011

Education Level	Lower Savannah	SC
No school	1.1	1.1
Grades 1-9	8.4	7.0
10th Grade	3.4	3.3
11th Grade	3.8	3.2
12th Grade-no diploma	1.8	1.8
HS grad/GED	34.3	30.9
Some College	19.4	20.1
Associates	7.6	8.4
Bachelors	12.8	15.6
Masters+	7.4	8.6

Source: US Census Bureau, ACS, SCDEW

Figure 17: Educational Attainment - Lower Savannah 2011

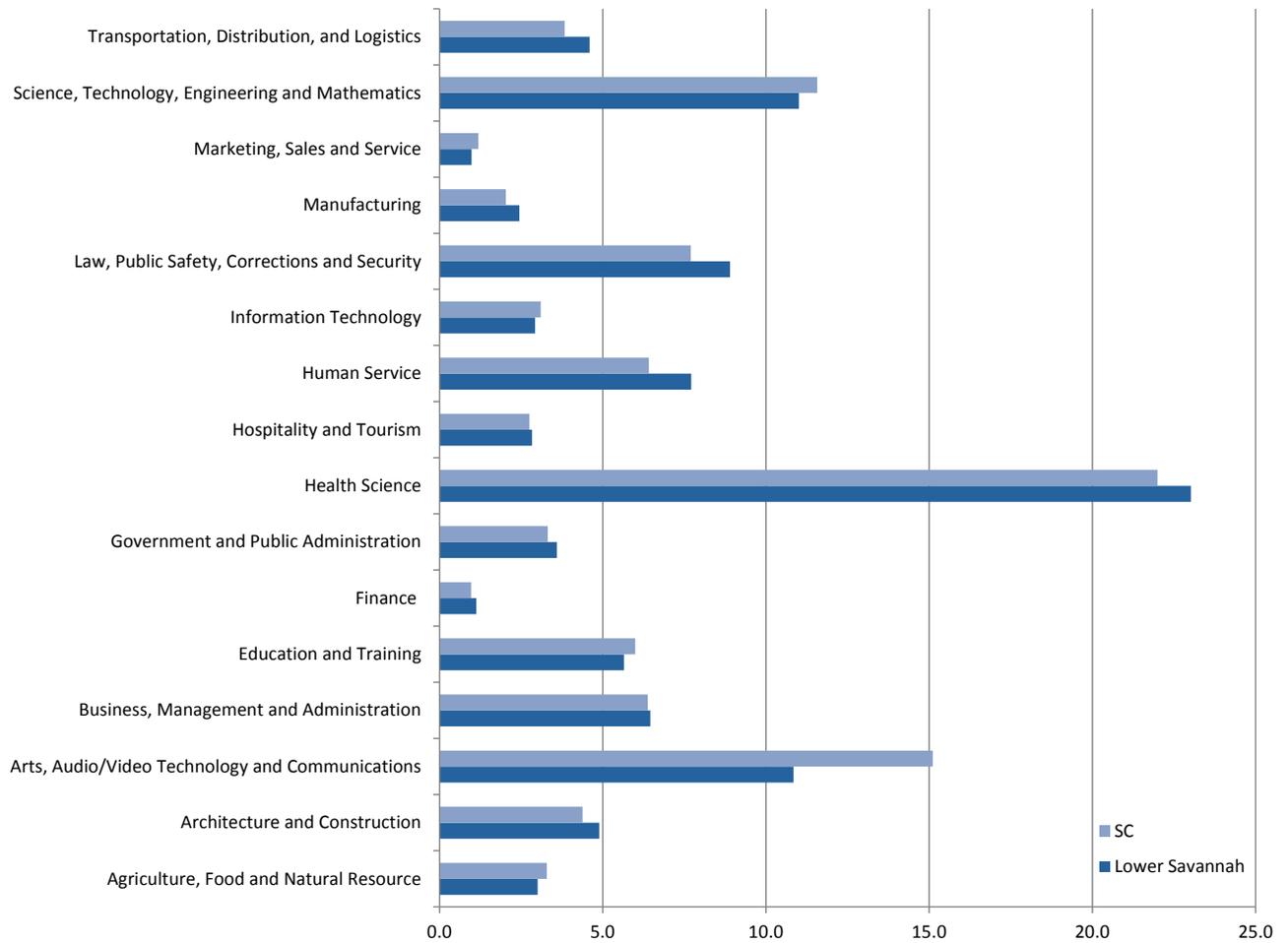


Source: US Census Bureau, ACS, SCDEW

CAREER CLUSTERS SELECTED BY HIGH SCHOOL STUDENTS

Eighth-grade students in South Carolina are required to choose a career cluster to concentrate on to lead them to a post-high school job or college major. There are 16 career clusters.

Figure 18: Percent of Students Declaring a Career Clusters In Lower Savannah and SC - 2012



Note: Declared clusters for students declaring a specific cluster on their primary Electronic Individual Graduation Plan (e-IGP) for 2011-2012 year

Source: SC Department of Education

Many students in the Lower Savannah area have chosen the Health Science career cluster in response to news of a shortage of healthcare workers in South Carolina. In keeping with the state trend, the area’s students also picked the Arts, Audio/Video Technology and Communications cluster and the Science, Technology, Engineering and Math (STEM) cluster in notable numbers.

Figure 19: Career Clusters - 2012

Cluster	Lower Savannah	SC
Agriculture, Food and Natural Resource	3.0	3.3
Architecture and Construction	4.9	4.4
Arts, Audio/Video Technology and Communications	10.8	15.1
Business, Management and Administration	6.5	6.4
Education and Training	5.6	6.0
Finance	1.1	1.0
Government and Public Administration	3.6	3.3
Health Science	23.0	22.0
Hospitality and Tourism	2.8	2.8
Human Service	7.7	6.4
Information Technology	2.9	3.1
Law, Public Safety, Corrections and Security	8.9	7.7
Manufacturing	2.4	2.0
Marketing, Sales and Service	1.0	1.2
Science, Technology, Engineering and Mathematics	11.0	11.6
Transportation, Distribution, and Logistics	4.6	3.8

Source: SC Department of Education

DEGREES AWARDED

In higher education, Lower Savannah area colleges and universities have conferred a wide variety of awards. Of the top 20, Liberal Arts and Business Administration are the most popular followed by Registered Nursing. The institutions included in this data are Aiken Technical College, Denmark Technical College, Orangeburg-Calhoun Technical College, South Carolina State University, USC-Aiken, and USC-Salkehatchie.

Figure 20: Top 20 Majors in Lower Savannah - 2011

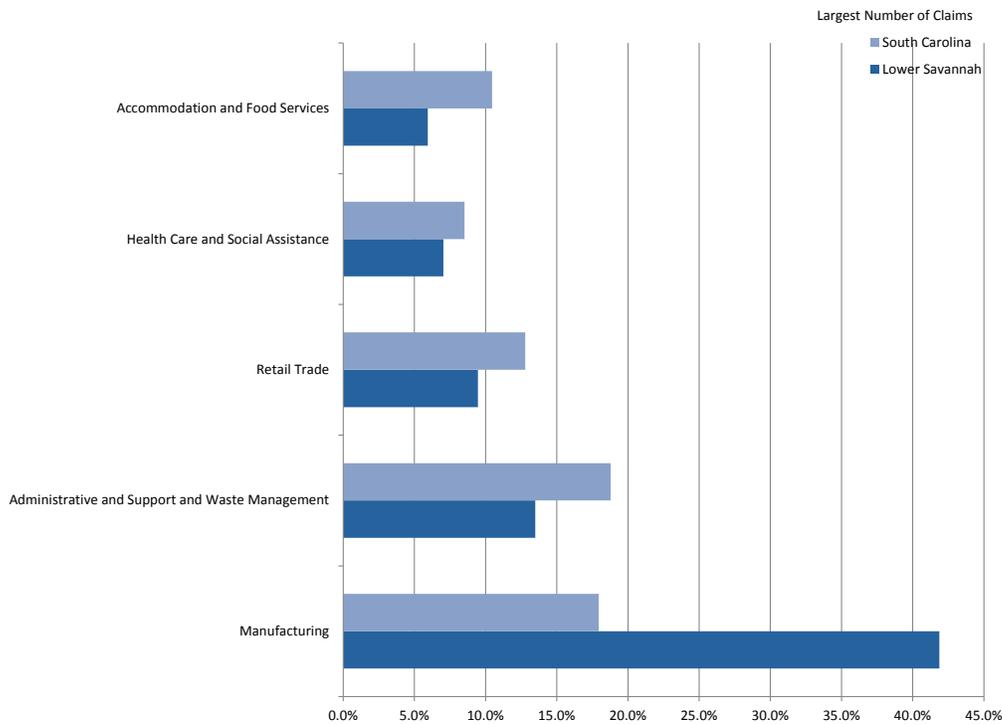
Majors	
Liberal Arts and Sciences/Liberal Studies	292
Business Administration and Management, General	166
Registered Nursing/Registered Nurse	116
Social Work	104
Health Professions and Related Clinical Sciences	93
Nursing - Registered Nurse Training, BSN Generic	88
Automobile/Automotive Mechanics Technology	87
Licensed Practical/Vocational Nurse Training	80
Welding Technology/Welder	77
Biology/Biological Sciences, General	76
Data Processing & Data Processing Technology	64
Psychology, General	62
Accounting	57
Educational Leadership and Administration, General	56
Criminal Justice/Safety Studies	52
Family and Consumer Sciences/Human Sciences	52
Management	51
Business/Commerce, General	46
Elementary Education and Teaching	46
Kinesiology and Exercise Science	44

Source: SC Commission on Higher Education, http://www.che.sc.gov/New_Web/Data&Pubs.htm

CHARACTERISTICS OF UI CLAIMS BY OCCUPATION

Another source of supply for the workforce is people who are receiving unemployment compensation. In the Lower Savannah LWIA area, many claims filed are in the Manufacturing (or Production) group. This is in line with the areas industry concentration of manufacturing companies.

Figure 21: Characteristics of UI Claims by Occupation - April 2013



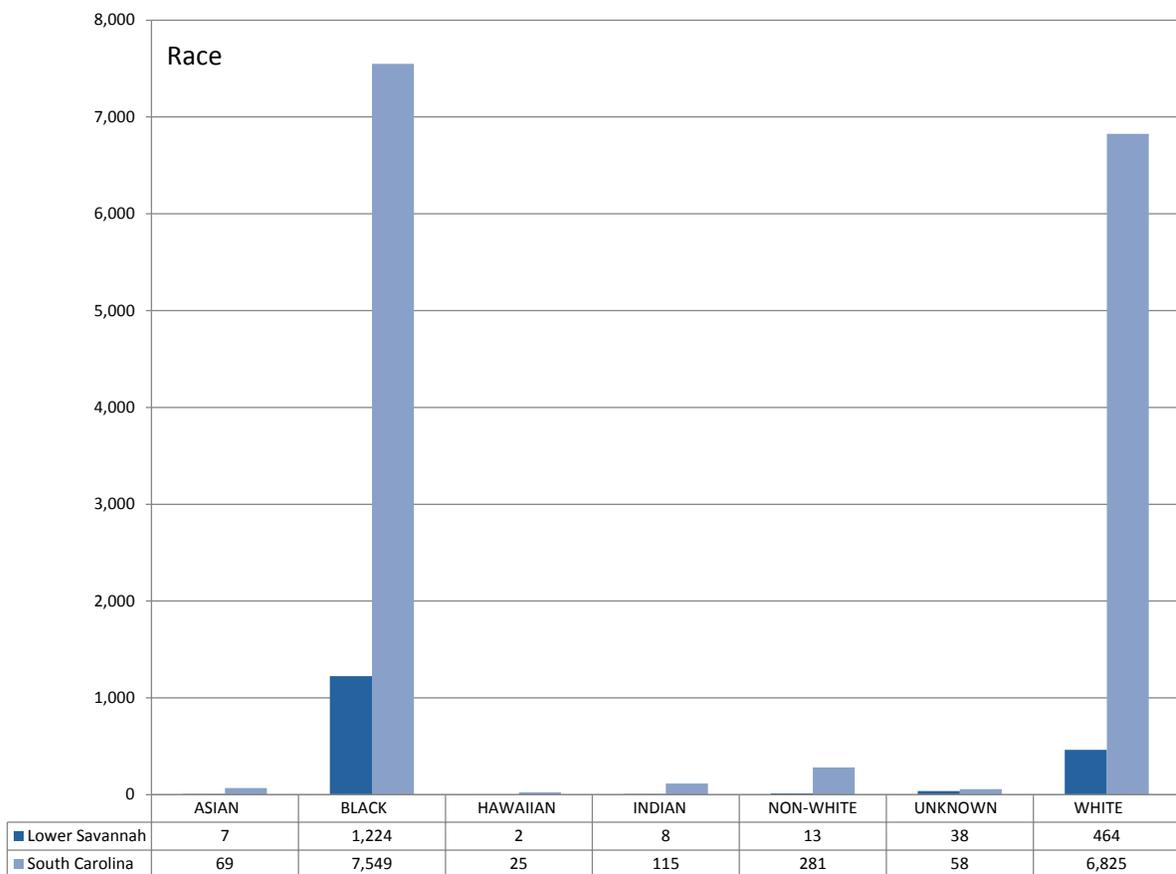
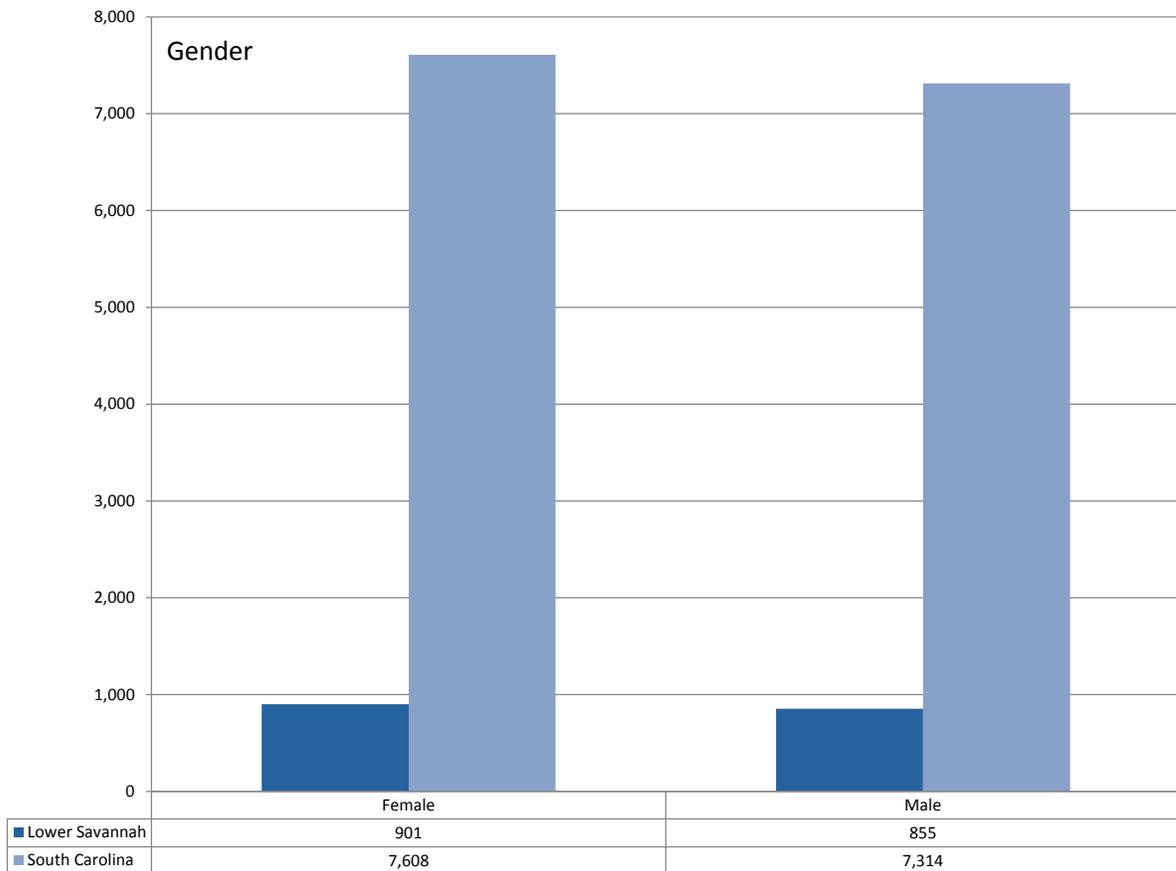
Occupation	Lower Savannah	South Carolina
Manufacturing	500	2,267
Administrative and Support and Waste Management	161	2,373
Retail Trade	113	1,616
Health Care and Social Assistance	84	1,076
Accommodation and Food Services	71	1,321
Construction	58	820
Professional, Scientific, and Technical Services	53	698
Public Administration	23	206
Agriculture, Forestry, Fishing and Hunting	21	98
Educational Services	20	222
Transportation and Warehousing	18	414
Wholesale Trade	16	445
Finance and Insurance	16	300
Real Estate and Rental and Leasing	12	213
Other Services (except Public Administration)	11	292
Arts, Entertainment, and Recreation	9	94
Information	4	122
Utilities	3	22
Management of Companies and Enterprises	1	35

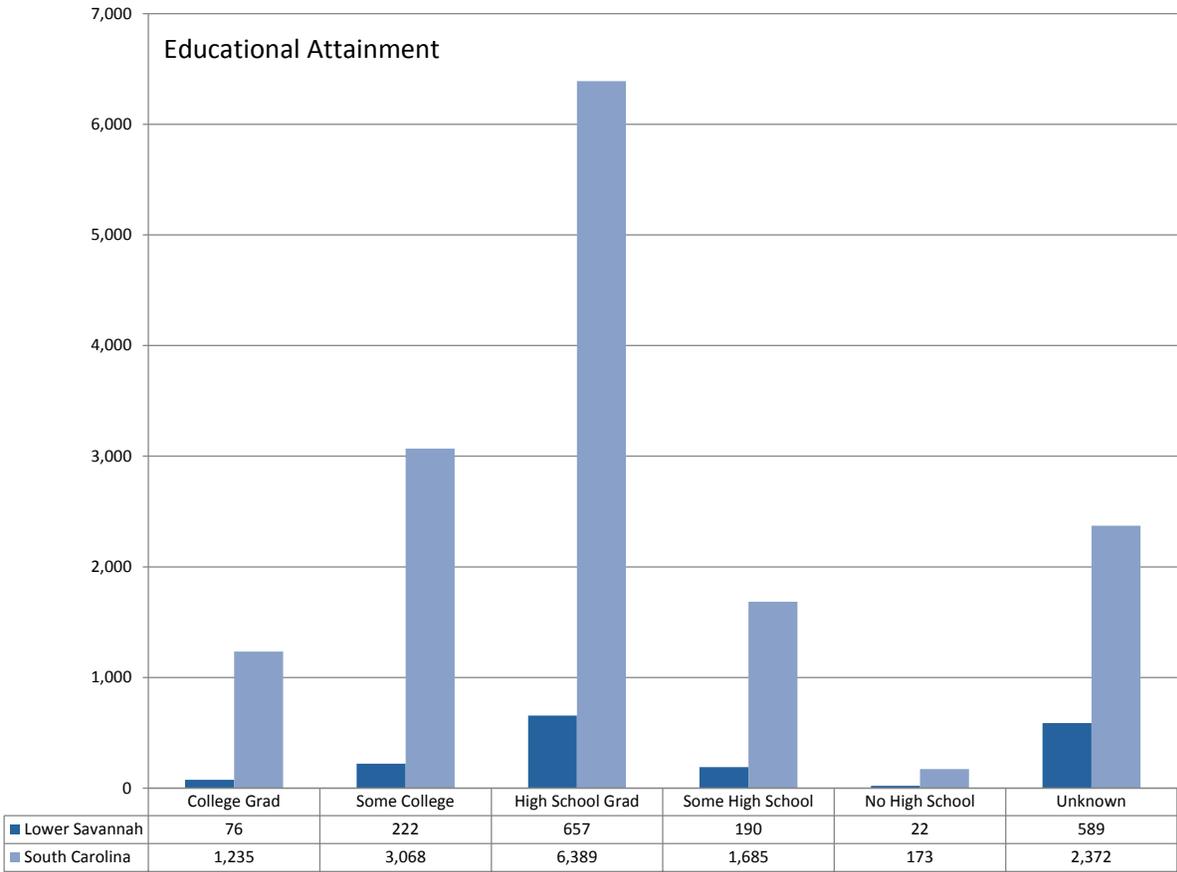
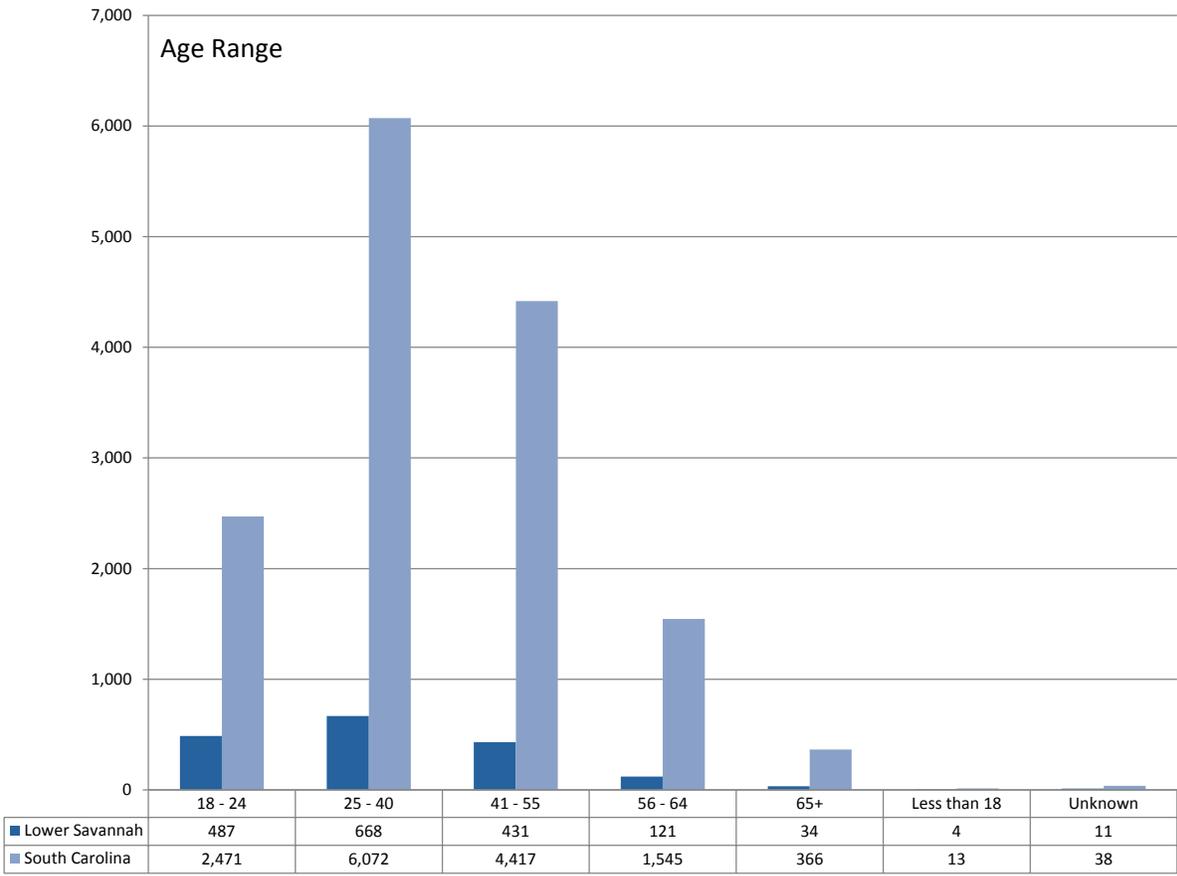
Source: SCDEW

UNEMPLOYMENT INSURANCE CLAIMANT CHARACTERISTICS

The people in this area who were receiving unemployment insurance benefits in April 2013 were typically female, black, 25-40 years old, and were high school graduates or earned a GED.

Figure 22: UI Claimant Characteristics - April 2013





Source: SCDEW

DEMAND: WHAT DO WE NEED?

Workforce demand shows what is needed in an area to support current and future employers. This section examines current (real-time) demand through online job advertisements, industry and occupational projections to 2018, educational requirements for future jobs, and the skills needed for those occupations.

Online job advertisements give a snapshot of what positions need to be filled in an area. The data is from the Conference Board Help Wanted OnLine® Data Series (HWOL) which measures the number of new and reposted job ads from over 16,000 Internet job boards. In April 2013, the largest occupational group with job ads in the Lower Savannah LWIA was Healthcare Practitioners and Technical Occupations followed by Architecture and Engineering Occupations.

ONLINE JOB ADVERTISEMENTS

Figure 23: Lower Savannah HWOL - April 2013 by Major Group

Occupation	# of Job Ads
Healthcare Practitioners and Technical Occupations	469
Architecture and Engineering Occupations	201
Sales and Related Occupations	179
Office and Administrative Support Occupations	135
Management Occupations	134
Food Preparation and Serving Related Occupations	115
Transportation and Material Moving Occupations	104
Computer and Mathematical Occupations	79
Healthcare Support Occupations	75
Installation, Maintenance, and Repair Occupations	73
Production Occupations	68
Business and Financial Operations Occupations	59
Education, Training, and Library Occupations	52
Miscellaneous	51
Protective Service Occupations	31
Building and Grounds Cleaning and Maintenance Occupations	29
Community and Social Services Occupations	27
Arts, Design, Entertainment, Sports, and Media Occupations	27
Construction and Extraction Occupations	26
Life, Physical, and Social Science Occupations	12
Personal Care and Service Occupations	8
Legal Occupations	7
Farming, Fishing, and Forestry Occupations	2

Note: A job advertisement may include multiple openings.

Source: The Conference Board Help Wanted OnLine® Data Series (HWOL)

INDUSTRY PROJECTIONS

The Retail Trade industry is projected to have the largest growth from 2008 to 2018, growing by 1,433 jobs or 143 openings/year. This sector includes establishments selling home furnishings, electronics, vehicles and parts, food and beverage, clothing, and general merchandise. Administrative and Support and Waste Management and Remediation Services reports the next largest growth with a projected 129 openings/year.

Figure 24: Industry Projections - 2008-2018

Industry	Estimate Employment (2008)	Projected Employment (2018)	Change	Percent Change	Annual Percent Change
Total Employment, All Jobs	121,483	129,059	7,576	6.24	0.61
Retail Trade	14,981	16,414	1,433	9.57	0.92
Administrative and Support and Waste Management and Remediation	12,231	13,522	1,291	10.56	1.01
Professional, Scientific, and Technical Services	3,152	4,221	1,069	33.92	2.96
Health Care and Social Assistance	10,348	11,340	992	9.59	0.92
Educational Services	11,665	12,427	762	6.53	0.63
Wholesale Trade	2,373	3,101	728	30.68	2.71
Finance and Insurance	3,053	3,772	719	23.55	2.14
Accommodation and Food Services	8,778	9,420	642	7.31	0.71
Transportation and Warehousing	2,562	3,152	590	23.03	2.09
Construction	5,724	6,083	359	6.27	0.61
Other Services (Except Government)	3,995	4,348	353	8.84	0.85
Utilities	865	966	101	11.68	1.11
Arts, Entertainment, and Recreation	1,083	1,179	96	8.86	0.85
Information	955	995	40	4.19	0.41
Management of Companies and Enterprises	96	95	-1	-1.04	-0.10
Mining	137	130	-7	-5.11	-0.52
Real Estate and Rental and Leasing	643	630	-13	-2.02	-0.20
Government	8,153	8,080	-73	-0.90	-0.09
Agriculture, Forestry, Fishing and Hunting	3,929	3,450	-479	-12.19	-1.29
Manufacturing	19,360	18,036	-1,324	-6.84	-0.71

Source: BLS, SCDEW, QCEW, WI

OCCUPATIONAL PROJECTIONS

Many of the occupations projected to have numerous openings between 2008 and 2018 in this area are good jobs with better than average wages, such as Accountants, Pharmacists, and Management Analysts. Other occupations that will be in demand are Customer Service Representatives, Tellers, and Pharmacy Technicians. Occupations, like Civil Engineers and Surveying and Mapping Technicians, as shown in Figure 25, highlight a developing area.

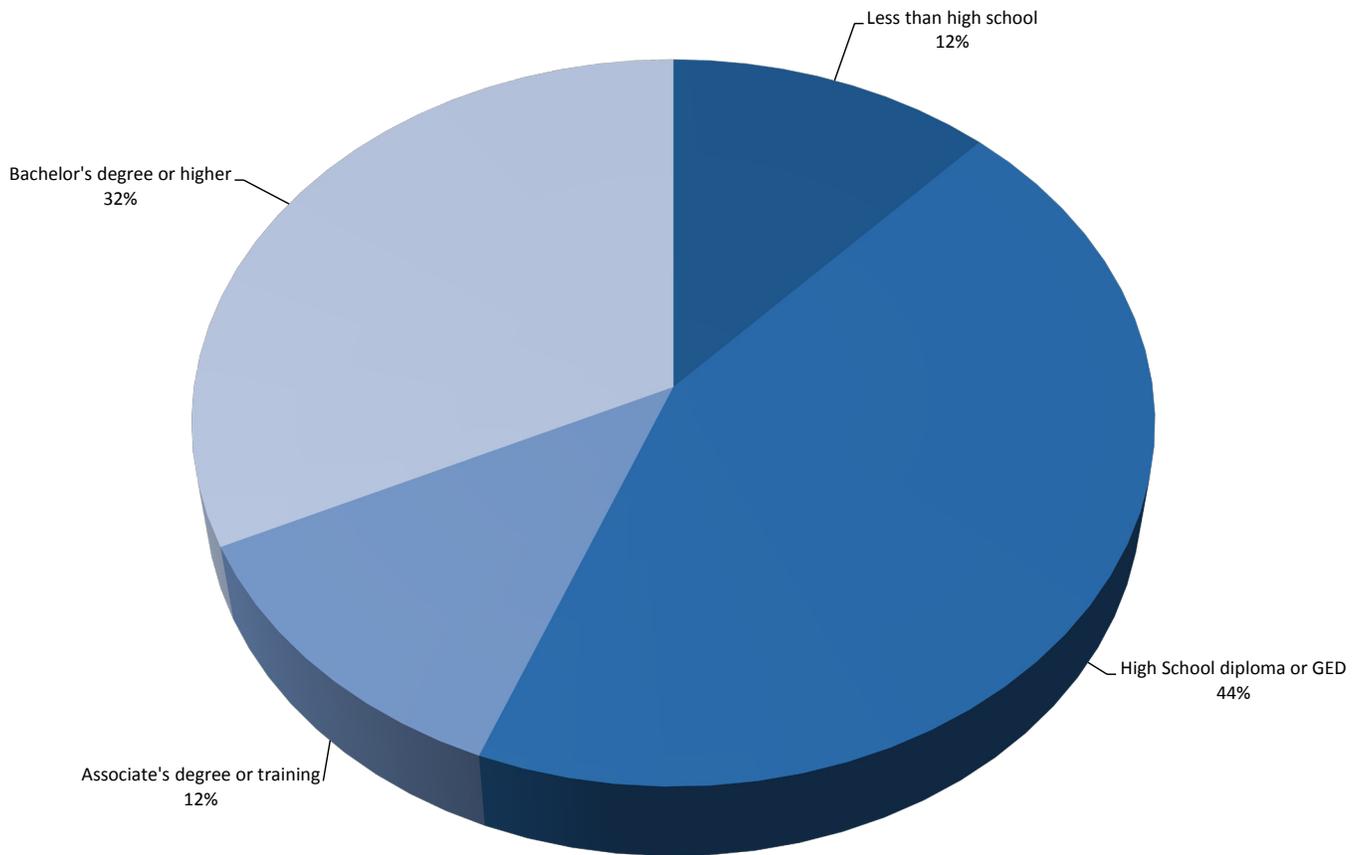
Figure 25: Growing Occupations - 2008-2018

Occupation	Estimated Employment (2008)	Projected Employment (2018)
Accountants and Auditors	763	928
Customer Service Representatives	682	838
Tellers	645	792
Lawyers	386	453
Pharmacy Technicians	284	422
Management Analysts	350	417
Pharmacists	268	367
Loan Officers	271	333
Insurance Sales Agents	251	312
Electrical and Electronic Engineering Technicians	195	229
Civil Engineers	165	212
Heating, Air Conditioning, and Refrigeration Mechanics	170	211
Surveying and Mapping Technicians	159	198
Coaches and Scouts	153	185
Sales Managers	136	165
Mixing and Blending Machine Setters, Operators	129	153
Instructional Coordinators	99	120
Public Relations Specialists	92	115
Compliance Officers, Except Agriculture, Construction	78	94
Wholesale and Retail Buyers, Except Farm Products	34	45

Source: BLS, SCDEW, OES, WI

Of the top 50 projected growing occupations by percent change, 22 require a high school diploma or GED, six require less than a high school diploma or GED, 16 require a bachelor’s degree or higher, six have an associate’s degree or require some kind of postsecondary vocational training. Educational attainment at or above a high school diploma is needed for nearly all (88 percent) of the good future jobs. Although jobs will still be available for high school graduates, employers increasingly want workers with industry-specific skills and certifications. This means more training from a university, college, apprenticeship, or technical school. A high school diploma is no longer enough to get many jobs, now or in the future.

Figure 26: Education for Top 50 Projected Occupations



Source: BLS, SCDEW, OES, WI

It is just as important to know which occupations are declining in the area. Declines are often due to technological advances (i.e. computers or robots replacing humans), so many of the declining occupations are projected to be in occupations requiring manual labor.

Figure 27: Top 20 Projected Declining Occupations in Lower Savannah - 2008-2018

Occupation
Computer Operators
Cutting, Punching, and Press Machine Setters, Operators
File Clerks
Floral Designers
Human Resources Assistants, Except Payroll and Time
Industrial Engineering Technicians
Industrial Production Managers
Inspectors, Testers, Sorters, Samplers & Weighers
Judges, Magistrate Judges, and Magistrates
Mail Clerks and Mail Machine Operators
Maintenance Workers, Machinery
Meter Readers, Utilities
Packers and Packagers, Hand
Payroll and Timekeeping Clerks
Postal Service Clerks
Postmasters and Mail Superintendents
Pressers, Textile, Garment, and Related Materials
Switchboard Operators, Including Answering Service
Team Assemblers
Weighers, Measurers, Checkers, and Samplers

Source: BLS, SCDEW, OES, WI

SKILLS OF PROJECTED OCCUPATIONS

Using the top 50 projected growing occupations, the skill levels needed for the future workforce based on the definitions given earlier in this report can be categorized.

Figure 28: Skill Levels

Low	13
Middle	21
High	16

Source: BLS, SCDEW, OES, WI

Low-skilled jobs often have commensurate (i.e. low) pay and do not require much education, experience, or OJT. Does the supply of workers have the right skills for the jobs in the future?

WORKFORCE CHALLENGES

The current economic situation in the Lower Savannah LWIA, the supply of workers, and the characteristics of workers who will be in demand has been reviewed. What can be gleaned from these findings? Are there gaps between supply and demand?

Supply Findings

With the population growing slowly until 2030 and a smaller-than-the-state share of 25-44 year olds, this area looks to have a challenge in having a supply of workers. This is also evident in the overall educational attainment of residents 25 years and older: a higher percent of residents with less than a high school diploma than the state as a whole. However, in-migration from other states/countries adds residents at the top end of the educational spectrum.

Many high school students selected the Health Science career cluster in keeping with state trends. The next most popular career cluster was STEM.

Demand Findings

Short-term employer demand was led by Health Sciences followed by Science, Technology, Engineering and Mathematics; and Marketing, Sales and Service. Employer long-term demands Business, Management and Administration; Marketing, Sales and Service; and Hospitality and Tourism personnel. Most of the top projected occupations require at least a high school diploma or GED.

Figure 29: Comparison of Supply and Demand

	Demand		Supply	
	Top online ads	Projected Occupations	Degrees Earned	Career Clusters Selected
Agriculture, Food and Natural Resource	0.9	5.0	0.6	3.0
Architecture and Construction	4.4	5.0	4.2	4.9
Arts, Audio/Video Technology and Communications	1.3	0.5	2.6	10.8
Business, Management and Administration	13.7	17.2	13.1	6.5
Education and Training	1.6	5.3	11.0	5.6
Finance	3.1	2.5	0.0	1.1
Government and Public Administration	0.2	0.2	0.7	3.6
Health Science	20.5	6.9	25.7	23.0
Hospitality and Tourism	3.9	12.8	0.0	2.8
Human Service	1.9	4.3	22.0	7.7
Information Technology	7.4	0.5	4.0	2.9
Law, Public Safety, Corrections and Security	0.7	2.4	3.4	8.9
Manufacturing	3.2	8.4	1.7	2.4
Marketing, Sales and Service	14.7	18.4	1.4	1.0
Science, Technology, Engineering and Mathematics	16.5	1.3	5.8	11.0
Transportation, Distribution, and Logistics	6.2	9.2	3.6	4.6

Source: BLS, SCDEW, WI, SC Department of Education, OES, HWOL

A few observations about the comparison that could be considered challenges to the workforce pipeline include:

- There is an oversupply of immediate and, especially, long-term Health Care workers; there is a severe shortage in the short- and long-terms for Marketing, Sales and Service Workers.
- There is a short-term oversupply of Education and Training and Human Service job candidates.
- There is a short-term demand for STEM not being met by today's graduates but the opposite situation exists long-term.
- There is a severe undersupply of Business, Management and Administration; Hospitality and Tourism; Manufacturing; and Transportation, Distribution, and Logistics long-term job candidates.
- There is an oversupply of long-term Arts, Audio/Video Technology and Communications and Law, Public Safety, Corrections and Security students.

There is always a demand for employees with soft skills. It is said that hard skills (training, degrees, or certification) get you hired, but soft skills get you fired. Many of our residents need to learn or get a refresher in soft skills in order to KEEP their jobs. Employers see the need.

Top 10 Soft Skills Found in Online Ads for South Carolina (April 2013)

1. Oral and written communication skills
2. Customer Service Oriented
3. Problem solving
4. Detail oriented
5. Microsoft Office
6. Self-starting / Self-motivated
7. Organizational skills
8. Troubleshooting
9. Work independently
10. Sales experience

Source: The Conference Board Help Wanted OnLine® Data Series (HWOL)

CONCLUSION

The workforce (current and potential) in the Lower Savannah LWIA area faces several challenges. The population continues to increase slowly, and the education level for the population is lower than the state as a whole with lower percentages of residents with education beyond high school. There are high levels of employers advertising for jobs in business, management, marketing, and sales, STEM, and health care. However, some supply flows could be fine-tuned to be more in line with demand.

The data shows that:

- There is an undersupply of students choosing Business, Management and Administration; Hospitality and Tourism; Manufacturing; Transportation, Distribution, and Logistics; and Marketing, Sales and Service to meet the area's future demand.
- There is an oversupply of students choosing Arts, Audio/Video Technology and Communication; Law, Public Safety, Corrections and Security; STEM; and Health Sciences to meet projected employment needs in the LWIA.
- Comprehensive soft skills training is needed for all students and job seekers (high school, post-secondary, adult, new and returning entrants to the labor force, and incumbent workers) so that they can not only get hired but retain their positions and thus reduce employment turnover.

Getting education more in line with the demands of employers will help the Lower Savannah LWIA meet the challenges it faces.

MIDLANDS LWIA WORKFORCE REPORT 2012



The *Midlands Workforce Report* is published by the Labor Market Information (LMI) Department of the South Carolina Department of Employment and Workforce. The information and analyses provided in this publication are based on data collected from sources throughout South Carolina and the United States.

About SC DEW and LMI:

The Labor Market Information Department compiles and publishes employment statistics, job forecasts, wage data, demographics, and other labor market information to help public and private organizations, researchers, and others better understand today's complex workforce.

The LMI Department produced this report under the leadership of:

Executive Director - Cheryl Stanton
Interim Deputy Assistant Executive Director - Kerry Paul
Labor Market Information Director - Brenda Lisbon

South Carolina Department of Employment and Workforce
1550 Gadsden Street
Columbia, South Carolina 29201
(803) 737-2660
www.dew.sc.gov
www.scworkforceinfo.com



TABLE OF CONTENTS

EXECUTIVE SUMMARY	VI
INTRODUCTION	VII
ECONOMIC DISCUSSION: A CURRENT PICTURE OF THE WORKFORCE	1
EMPLOYMENT BY INDUSTRY	1
LOCATION QUOTIENT	1
AVERAGE ANNUAL WAGE BY INDUSTRY	2
OCCUPATIONAL EMPLOYMENT	3
SKILLS DATA.....	4
EMPLOYMENT AND UNEMPLOYMENT	6
NEW STARTUP FIRMS	8
EMPLOYERS BY SIZE OF ESTABLISHMENT	9
SUPPLY: WHAT'S OUT THERE?	10
POPULATION BY AGE	10
POPULATION CHANGE AND MIGRATION	11
COMMUTING PATTERNS	12
EDUCATIONAL ATTAINMENT	12
CAREER CLUSTERS SELECTED BY HIGH SCHOOL STUDENTS	13
DEGREES AWARDED	15
CHARACTERISTICS OF UI CLAIMS BY OCCUPATION	16
UNEMPLOYMENT INSURANCE CLAIMANT CHARACTERISTICS.....	17
DEMAND: WHAT DO WE NEED?	20
ONLINE JOB ADVERTISEMENTS.....	20
INDUSTRY PROJECTIONS	20
OCCUPATIONAL PROJECTIONS	21
SKILLS OF PROJECTED OCCUPATIONS	24
WORKFORCE CHALLENGES	25
CONCLUSION	27

TABLE OF FIGURES

FIGURE 1: MIDLANDS LWIA EMPLOYMENT BY INDUSTRY - 3RD QUARTER 2012.....	1
FIGURE 2: NOTABLE LOCATION QUOTIENTS - 2011	2
FIGURE 3: ANNUAL AVERAGE WAGE BY INDUSTRY - 3RD QUARTER 2012.....	3
FIGURE 4: TOP 20 OCCUPATIONS WITH WAGES - 2012.....	4
FIGURE 5: TOP OCCUPATIONS BY SKILL CLASSIFICATION - MIDLANDS 2012.....	5
FIGURE 6: EMPLOYMENT - 2002-2012.....	6
FIGURE 7: UNEMPLOYMENT - 2002-2012	7
FIGURE 8: ANNUAL UNEMPLOYMENT - 2002-2012	8
FIGURE 9: MONTHLY UNEMPLOYMENT RATE - MARCH 2011-APRIL 2013.....	8
FIGURE 10: NEW STARTUP FIRMS - 2007-2012.....	9
FIGURE 11: EMPLOYERS BY SIZE OF ESTABLISHMENT - 3RD QUARTER 2012.....	9
FIGURE 12: POPULATION BY AGE	10
FIGURE 13: POPULATION PROJECTIONS TO 2030.....	11
FIGURE 14: POPULATION MIGRATION - 2011 - 5-YEAR ESTIMATE.....	11
FIGURE 15: COMMUTING PATTERNS - 2010.....	12
FIGURE 16: EDUCATIONAL ATTAINMENT - MIDLANDS AND SOUTH CAROLINA 2011	12
FIGURE 17: EDUCATIONAL ATTAINMENT - MIDLANDS 2011.....	13
FIGURE 18: PERCENT OF STUDENTS DECLARING A CAREER CLUSTERS IN MIDLANDS AND SC - 2012.....	14
FIGURE 19: CAREER CLUSTERS - 2012.....	15
FIGURE 20: TOP 20 MAJORS IN MIDLANDS - 2011	16
FIGURE 21: CHARACTERISTICS OF UI CLAIMS BY OCCUPATION - APRIL 2013.....	17
FIGURE 22: UI CLAIMANT CHARACTERISTICS - APRIL 2013.....	18
FIGURE 23: MIDLANDS HWOL - APRIL 2013 BY MAJOR GROUP.....	20
FIGURE 24: INDUSTRY PROJECTIONS - 2008-2018	21
FIGURE 25: GROWING OCCUPATIONS - 2008-2018.....	22
FIGURE 26: EDUCATION FOR TOP 50 PROJECTED OCCUPATIONS	23
FIGURE 27: TOP 20 PROJECTED DECLINING OCCUPATIONS IN MIDLANDS - 2008-2018	24
FIGURE 28: SKILL LEVELS.....	24
FIGURE 29: COMPARISON OF SUPPLY AND DEMAND.....	25

EXECUTIVE SUMMARY

The employment leaders for Midlands Local Workforce Investment Area (LWIA) are Health Care and Social Assistance and Retail Trade. Employment growth is anticipated by 2018 in several industries, especially Health Care and Social Assistance and Educational Services. The highest wages are paid by the Utilities and Professional, Scientific, and Technical Services industries.

The LWIA's population grew by over 1.5 percent per year since 2000, and it has more residents aged 15 to 39 than the state's average.

Employment is rising and, unemployment is declining. The LWIA has a historically lower unemployment rate than the state, and it remained so during and after the recession. Employment is concentrated in the Columbia area, and nearly 22,600 more people enter the LWIA for work than leave it every day. Administrative and Support and Waste Management is the largest industry represented in unemployment claims. This industry includes office administrative services; facilities support services; employment services; services to buildings and dwellings; and waste collection, treatment, and disposal services.

Midlands has a higher proportion of residents with a high school education or more than the state does as a whole. For projected growing jobs, 4 percent require no diploma, 20 percent require a diploma and training, 30 percent require an associate's degree or vocational training, and 46 percent require a bachelor's degree or more.

Midlands LWIA businesses desire a trained workforce with the current focus being on business, marketing, healthcare, and information technology. Technology has become part of most occupations, requiring continuous training and skill-upgrading. A challenge for the LWIA is to match the skill levels of the workforce with open positions. There may be a mismatch between the employer's skill demands and the occupations that the worker will accept.

Midlands LWIA has several factors working in its favor. It has a growing population and numerous educational institutions available to strengthen the workforce. The area has three strong economic players: Fort Jackson, the University of South Carolina, and the state government. These have provided relative stability during the Great Recession. Workers are becoming smarter and are gaining skills; the Midlands LWIA is transitioning well from low to middle-skilled jobs.

The patterns and trends described in this report offer cause for both optimism and concern. Midlands LWIA has an exciting future ahead of it and can lead the way in delivering the skilled talent and economic opportunities that businesses and workers in the area deserve.

INTRODUCTION

The Midlands Local Workforce Investment Area is composed of Fairfield, Lexington, and Richland counties and is located in the middle of the state. The LWIA is home to the state's capital of Columbia, Fort Jackson, and the main campus of the University of South Carolina. The area was very active in the Civil War and is one of the state's economic and commercial centers. Columbia is the largest city in South Carolina.

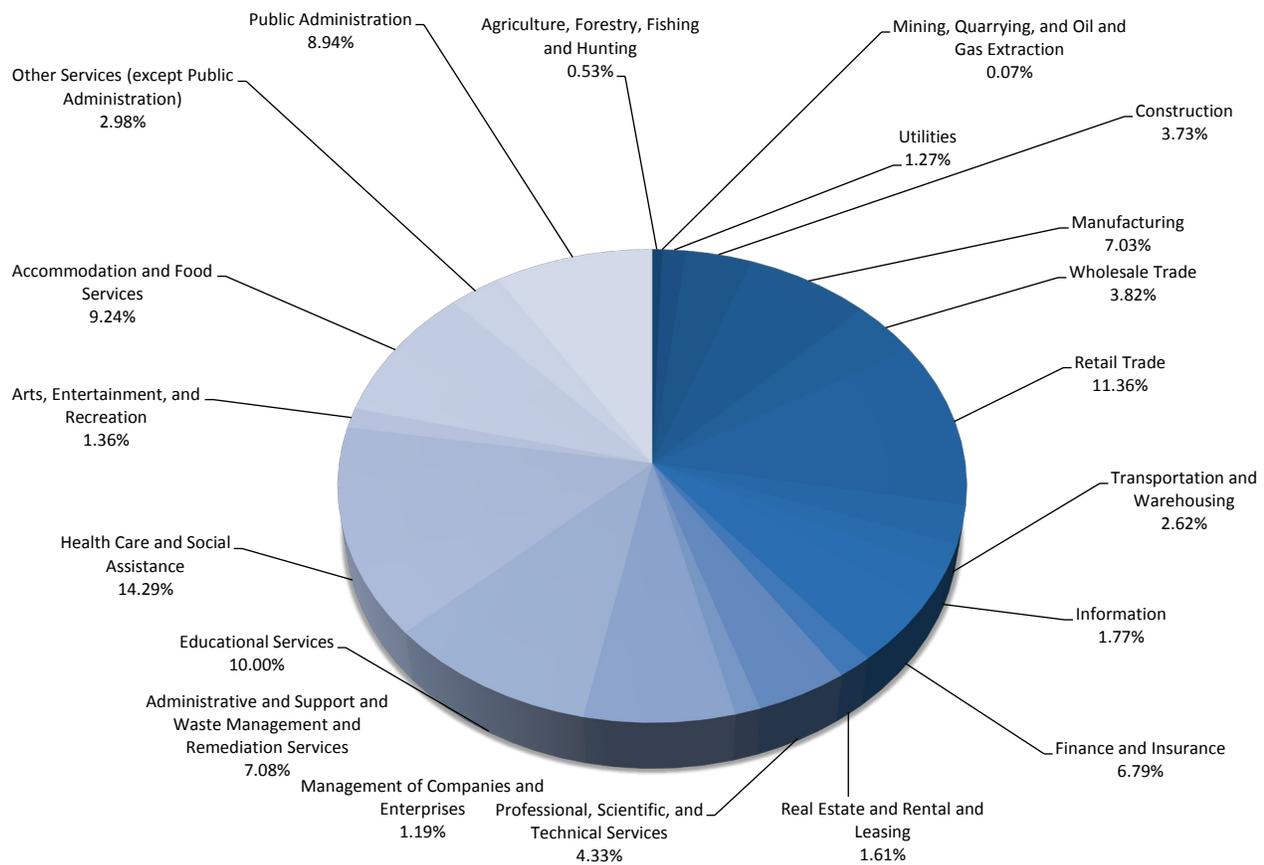
The economic changes this year in the Midlands LWIA demonstrate the shifting needs of employers and employees. Cultivating an understanding of the workforce allows all three counties to respond to anticipated future needs. Analyses help to identify the gap between what the workforce has in the way of talent and skills (supply), and what it may need in the future (demand).

The purpose of the Midlands LWIA Workforce Report is to present a comprehensive view of the status of Midlands LWIA's economy and workforce. The report includes an analysis of Midlands LWIA's workforce, industries, economic climate, and factors that will affect all. Forecasts will be made for the workforce, industries, and the economy.

ECONOMIC DISCUSSION: A CURRENT PICTURE OF THE WORKFORCE

EMPLOYMENT BY INDUSTRY

Figure 1: Midlands LWIA Employment By Industry - 3rd Quarter 2012



Source: Bureau of Labor Statistics (BLS), SC Department of Employment & Workforce (SCDEW), Quarterly Census of Employment and Wages (QCEW)

Health Care and Social Assistance and Retail Trade are the top two industries employing workers in the Midlands LWIA. Industries like Educational Services and Health Care and Social Assistance are healthy and flourishing, while others like Construction are still recovering from the recession. The 2010 per capita income for Midlands LWIA was \$32,012, which is an increase of 21.8 percent from 2000.¹ Economic growth has taken place in the past decade to enhance the LWIA workforce, although the area is still recovering from a tough business cycle.

LOCATION QUOTIENT

A location quotient (LQ) is a useful tool for determining the concentration of workers in a given area. Location quotients compare the regional share of employment in a particular industry to the national share of employment in the same industry. The resulting quotient reveals the degree of regional specialization or concentration in an industry and provides insight into what makes the area unique in comparison to the national average. An LQ of 1.0 means the concentration of jobs in that industry matches the nation's value. Location quotients higher than 1.0 indicate the level of specialization the area has in particular sectors. Lower quotients can indicate possible industries that could be expanded.

Figure 2: Notable Location Quotients - 2011

Industry and Sectors	Location Quotient
<i>Fairfield County</i>	
Nonmetallic mineral product manufacturing	16.9
Merchant wholesalers, nondurable goods	4.0
Manufacturing	2.3
<i>Lexington County</i>	
Couriers and messengers	5.2
Plastics and rubber products manufacturing	4.9
Textile mills	3.5
<i>Richland County</i>	
Insurance carriers and related activities	4.5
Utilities	2.9
Paper manufacturing	2.1

Source: US Department of Labor, Bureau of Labor Statistics - http://data.bls.gov/location_quotient

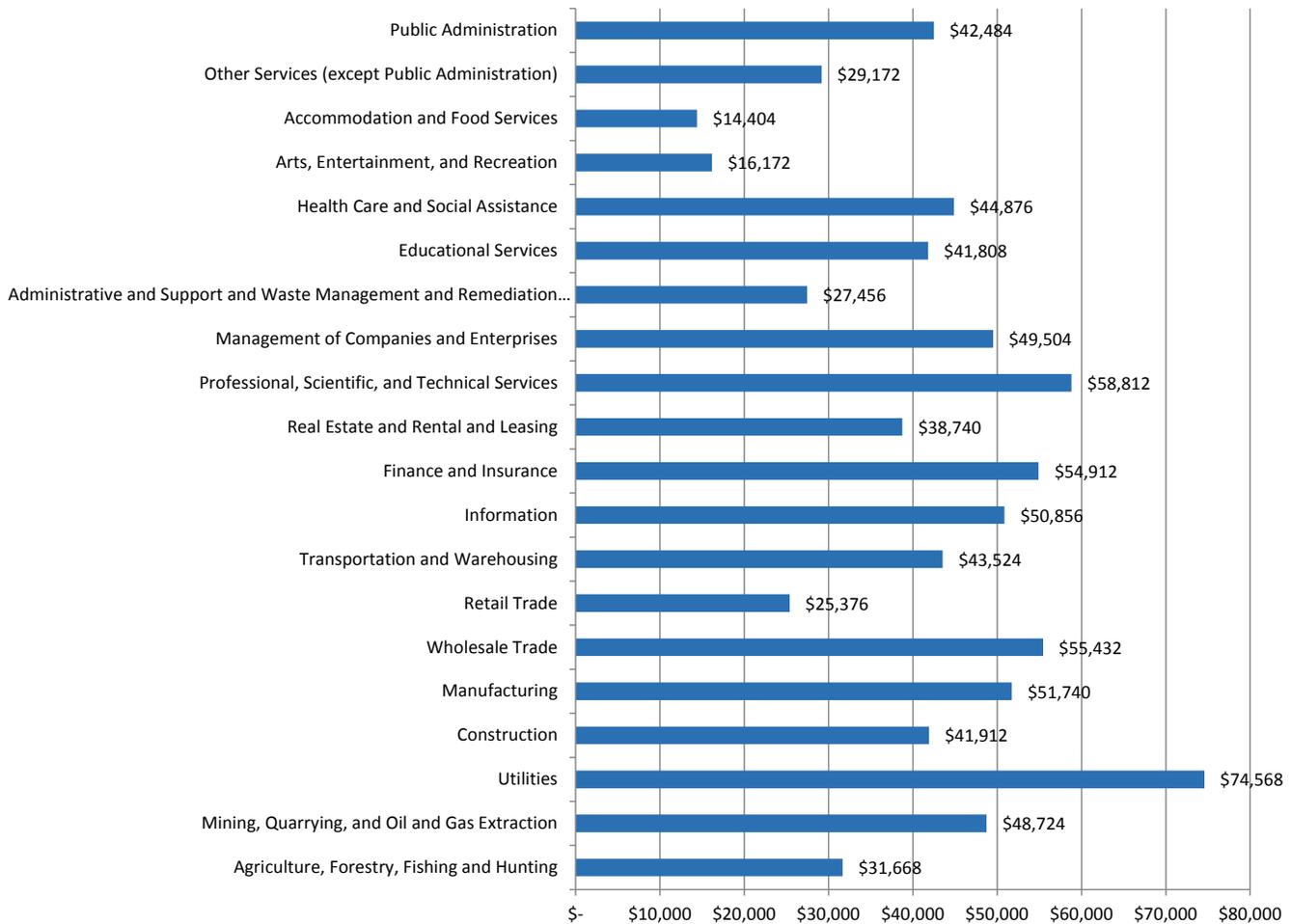
Manufacturing industries top the most concentrated sectors in this area with location quotients from 2.1 to 16.9. These industries, located throughout the area, include Paper, Plastics and Rubber Products, and Nonmetallic Mineral Products. Other notable sectors in the Midlands LWIA are Nondurable Goods Merchant Wholesalers in Fairfield County; Couriers and Messengers as well as Textile Mills in Lexington County; and Insurance Carriers and Utilities in Richland County.

AVERAGE ANNUAL WAGE BY INDUSTRY

The annual wages for the Utilities sector employees are the highest for any LWIA industry. Professional, Scientific, and Technical Service workers are the second highest paid group of employees in the LWIA.

High wage industries like Finance and Insurance and Professional, Scientific, and Technical Services usually require at least a bachelor's degree. Having an education is an excellent way to enter a high-wage industry and have more options for employment.

Figure 3: Annual Average Wage by Industry - 3rd Quarter 2012



Source: BLS, SCDEW, QCEW

OCCUPATIONAL EMPLOYMENT

When examining the current occupational employment in the area, one can observe that some of the top 20 occupations are low-skill, low-pay jobs. These jobs, like Cashiers, Waiters and Waitresses, and Food Preparers, have high turnover. These are not necessarily the most robust jobs as far as wages, but they are jobs.

Figure 4 lists occupations, such as Registered Nurses, General Managers, and Sales Representatives, that pay a higher wage. With Health Care and Social Assistance, Educational Services, and Retail Trade sectors comprising nearly 36 percent of the employment in the Midlands LWIA, the positions of Retail Salespersons, Elementary School Teachers, and Registered Nurses, not surprisingly, are listed among the top occupations.

Figure 4: Top 20 Occupations with Wages - 2012

Occupational Title	Total Employment	Hourly Average Wage (\$)
All Occupations	339,600	19.50
Retail Salespersons	11,110	11.99
Cashiers	10,330	8.65
Customer Service Representatives	9,620	15.05
Office Clerks, General	8,700	13.66
Registered Nurses	8,430	27.82
Combined Food Preparation and Serving Workers, Including Fast Food	6,980	8.37
Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	6,810	14.89
Laborers and Freight, Stock, and Material Movers, Hand	6,600	11.99
First-Line Supervisors of Office and Administrative Support Workers	5,680	22.45
Waiters and Waitresses	5,140	8.49
Janitors and Cleaners, Except Maids and Housekeeping Cleaners	4,580	10.10
Security Guards	4,450	13.53
Team Assemblers	4,310	12.69
General and Operations Managers	4,290	47.69
Stock Clerks and Order Fillers	4,060	10.61
Bookkeeping, Accounting, and Auditing Clerks	3,890	16.69
Heavy and Tractor-Trailer Truck Drivers	3,760	17.79
Sales Representatives, Wholesale and Manufacturing, Except Technical and Scientific Products	3,520	26.29
First-Line Supervisors of Retail Sales Workers	3,380	19.29
Elementary School Teachers, Except Special Education	3,350	23.96

Source: BLS, SCDEW, Occupational Employment Statistics (OES)

SKILLS DATA

Employers are beginning to see that a person’s skills, in addition to their education, may help in determining who to hire. Many times the degree is not as important as the skills gained through specialized training and/or experience. In order to be able to determine the current level of skills in the area, the top 50 current occupations by employment are presented, and assigned a low, middle, or high skill designation to that occupation. The definitions for those skills levels are:

- **LOW:** No high school or GED, or high school/GED with less than one year experience and no on-the-job-training (OJT), or short-term OJT
- **MIDDLE:** High school/GED with one year experience, or moderate OJT, or long-term OJT, or apprenticeship, or postsecondary vocational training, or some college, or associate’s degree, or less than a bachelor’s degree
- **HIGH:** Bachelor’s degree or higher

In the Midlands area, 24 of the top 50 jobs in 2012 are considered low-skill jobs. Nineteen are middle skill, and seven are high-skill occupations.

Figure 5: Top Occupations By Skill Classification - Midlands 2012

Skillset: LOW
Billing and Posting Clerks
Cashiers
Combined Food Preparation and Serving Workers, Including Fast Food
Construction Laborers
Cooks, Fast Food
Cooks, Restaurant
Customer Service Representatives
Dishwashers
Food Preparation Workers
Home Health Aides
Janitors and Cleaners, Except Maids and Housekeeping Cleaners
Laborers and Freight, Stock, and Material Movers, Hand
Landscaping and Groundskeeping Workers
Light Truck or Delivery Services Drivers
Maids and Housekeeping Cleaners
Office Clerks, General
Receptionists and Information Clerks
Retail Salespersons
Secretaries and Administrative Assistants, Except Legal, Medical, and Executive
Security Guards
Shipping, Receiving, and Traffic Clerks
Stock Clerks and Order Fillers
Teacher Assistants
Waiters and Waitresses
Skillset: MIDDLE
Bookkeeping, Accounting, and Auditing Clerks
Correctional Officers and Jailers
Executive Secretaries and Executive Administrative Assistants
First-Line Supervisors of Food Preparation and Serving Workers
First-Line Supervisors of Office and Administrative Support Workers
First-Line Supervisors of Retail Sales Workers
General and Operations Managers
Heavy and Tractor-Trailer Truck Drivers
Insurance Claims and Policy Processing Clerks
Insurance Sales Agents
Licensed Practical and Licensed Vocational Nurses
Maintenance and Repair Workers, General
Nursing Assistants
Paralegals and Legal Assistants
Police and Sheriff's Patrol Officers
Registered Nurses
Sales Representatives, Wholesale and Manufacturing, Except Technical and Scientific Products
Substitute Teachers
Team Assemblers
Skillset: HIGH
Accountants and Auditors
Elementary School Teachers, Except Special Education
Lawyers
Management Analysts
Middle School Teachers, Except Special and Career/Technical Education
Secondary School Teachers, Except Special and Career/Technical Education
Training and Development Specialists

Source: BLS, SCDEW, OES, Workforce Intelligence (WI)

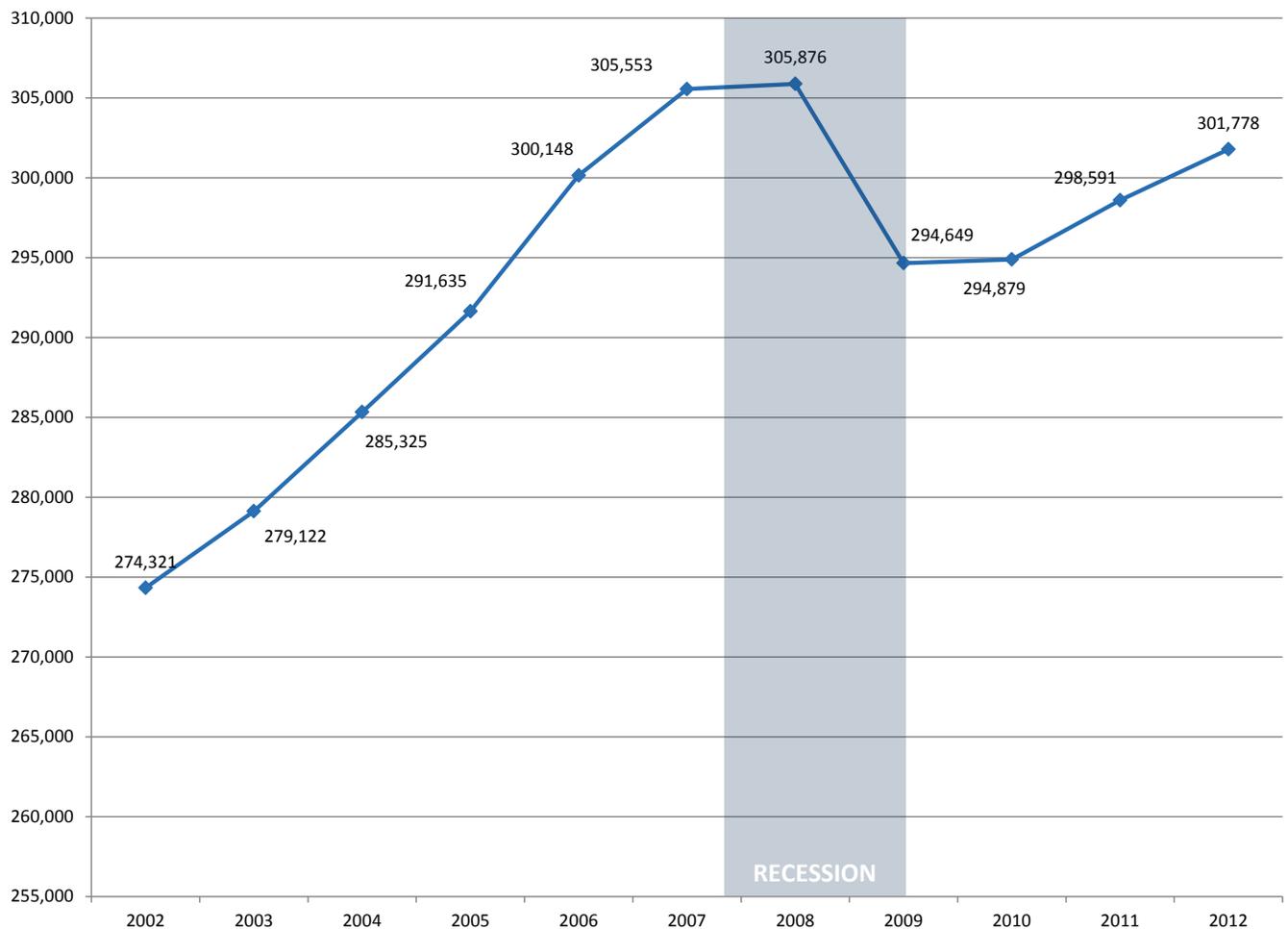
EMPLOYMENT AND UNEMPLOYMENT

A crucial indicator of the health of a workforce is its labor force levels. Labor force data count residents who are employed and unemployed. There are a few Federal definitions that will make discussion of the labor force a little easier to understand.

- Employed: Persons 16 years old or older who worked for pay any time during the week that includes the 12th of the month
- Unemployed: Persons 16 years old or older who are not working but want a job, and are able and willing to work
- Labor Force: Employed plus unemployed
- Unemployment Rate: Unemployment divided by labor force

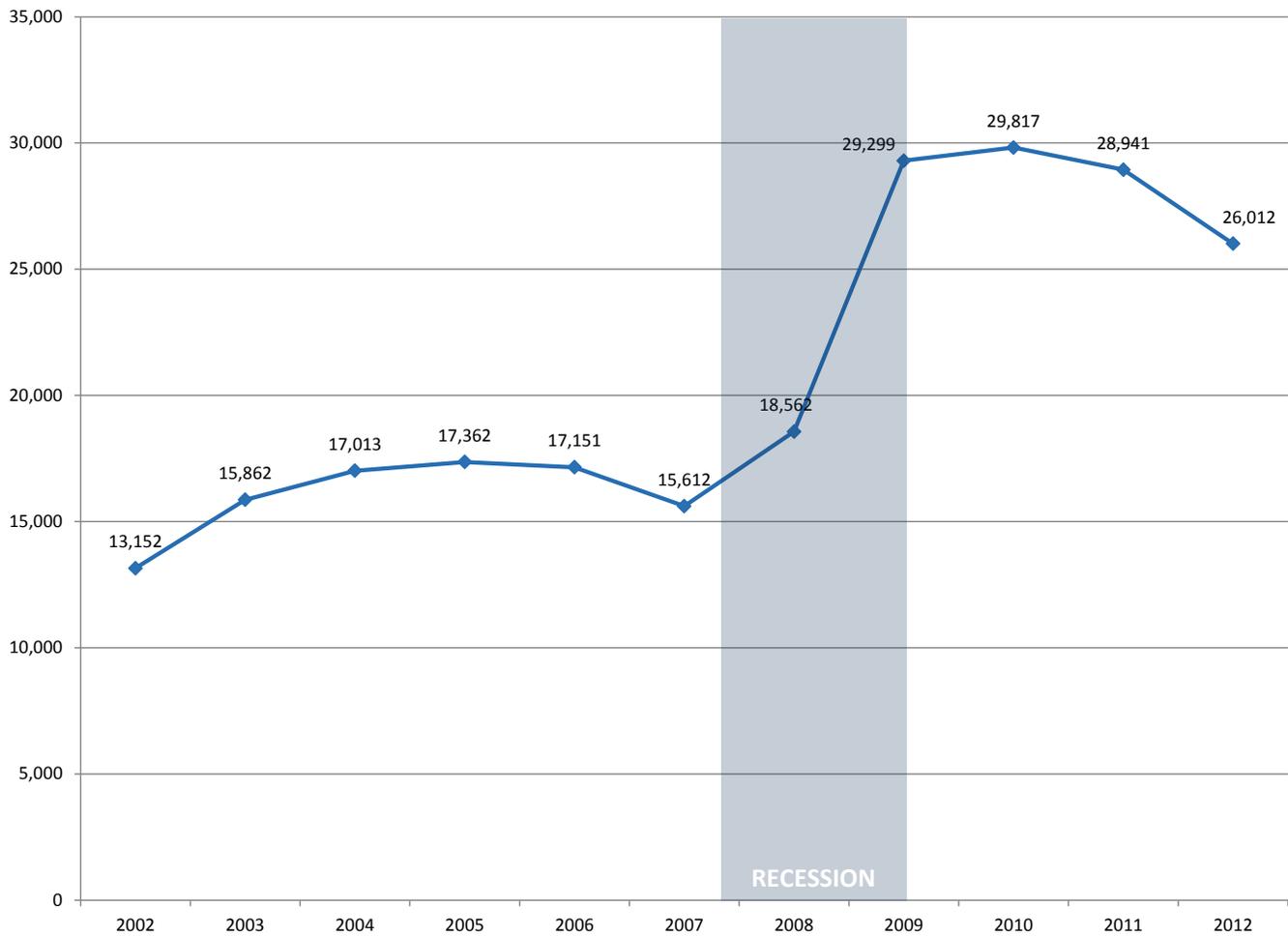
In Figure 6, the recession (officially from December 2007 through June 2009) had a great effect on the labor force. Employment dropped, and unemployment increased by 88 percent.

Figure 6: Employment - 2002-2012



Source: BLS, SCDEW, Local Area Unemployment Statistics (LAUS)

Figure 7: Unemployment - 2002-2012

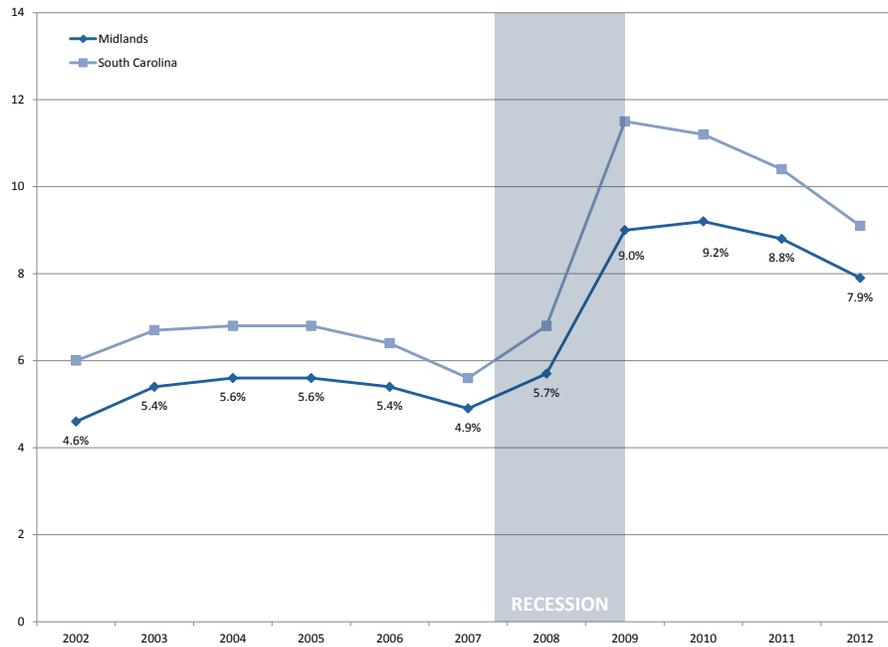


Source: BLS, SCDEW, LAUS

Tracking annual unemployment rates give a good snapshot of the state of an area's workforce. Annual rates smooth out the usual ups and downs of a month-to-month rate (due to normal seasonal or cyclical changes) to give a more accurate picture.

Figure 8 shows the annual rates for the Midlands LWIA area and South Carolina. Midlands has historically been below the state's rate, and this was the same during and after the recession. During the recession, the Midlands rate increased sharply from 4.9 percent in 2007 to 9.0 percent in 2009.

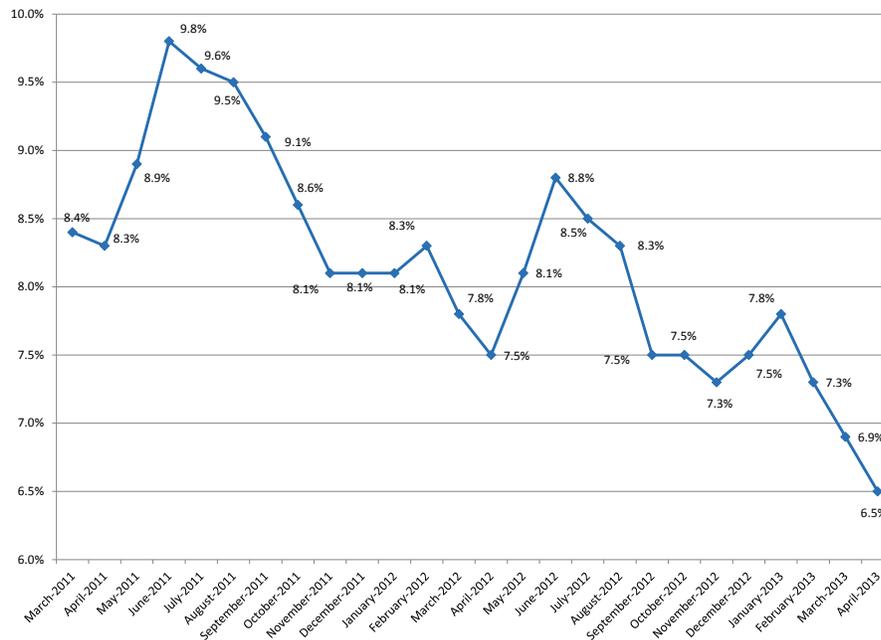
Figure 8: Annual Unemployment - 2002-2012



Source: BLS, SCDEW, LAUS

Figure 9 illustrates the monthly unemployment rate with its wide fluctuations since March 2011. The area seems to be steadily recovering from the recession.

Figure 9: Monthly Unemployment Rate - March 2011-April 2013



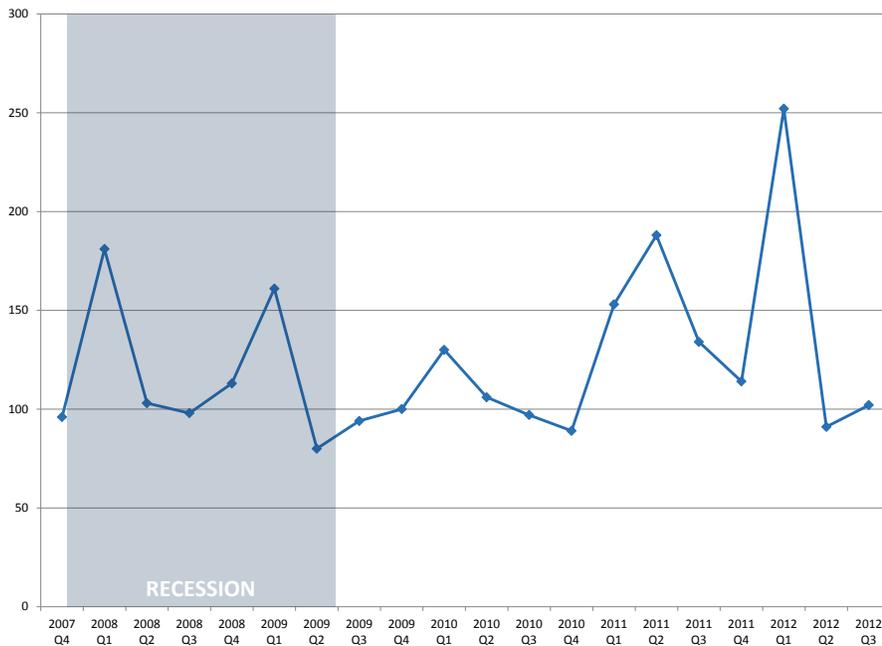
Source: BLS, SCDEW, LAUS

NEW STARTUP FIRMS

One way to see if an economy is improving is to examine data about startup firms. An increase in new companies might be an indicator of expansion in the area, whereas a drop in new firms shows a lack of confidence in the future. (Note: There is almost always a spike in startups in the first quar-

ter of the year.) Again, the recession had a major impact on normal business birth and death rates. Startups have been steady in the area with a large increase in early 2012.

Figure 10: New Startup Firms - 2007-2012



Source: BLS, SCDEW, QCEW

EMPLOYERS BY SIZE OF ESTABLISHMENT

By far, the largest category of business size in the area is small business. Small businesses (or establishments) are defined in South Carolina as companies employing 49 or fewer people. The Midlands LWIA and the state as a whole have 93 percent of establishments designated as small businesses.

Small businesses may need more support and assistance than larger companies because they may not have a designated human resources department or person. They may rely on other resources, such as SC Works Centers, for help with hiring, training, or screening job candidates.

Figure 11: Employers by Size of Establishment - 3rd Quarter 2012

Employees	Midlands	South Carolina
0 to 4	7,661	63,766
5 to 9	2,743	19,667
10 to 19	1,947	13,316
20 to 49	1,550	9,881
50 to 99	567	3,907
100 to 249	317	2,433
250 to 499	96	757
500 to 999	37	328
1000 +	25	264

Source: BLS, SCDEW, QCEW

SUPPLY: WHAT'S OUT THERE?

A manufacturing assembly line needs to have resources and supplies on-hand so that the line does not have to stop. The same is true for the workforce. The supply of workers needs to be of the right quantity and quality to do the job. Is the supply of workers in line with what the companies in the Midlands LWIA need? Seven streams of workforce supply provide an indication: population, commuting, education of the population, clusters of high school students, awards earned at higher education institutions, and characteristics of unemployment insurance claims and claimants.

POPULATION BY AGE

Age distribution in the area is similar to the state and the country for most segments of the population. In the 15-39 age cohorts, Midlands has a higher proportion of population than the state as a whole does, and in the 55+ age cohorts, the LWIA has a slightly lower proportion of population than the state.

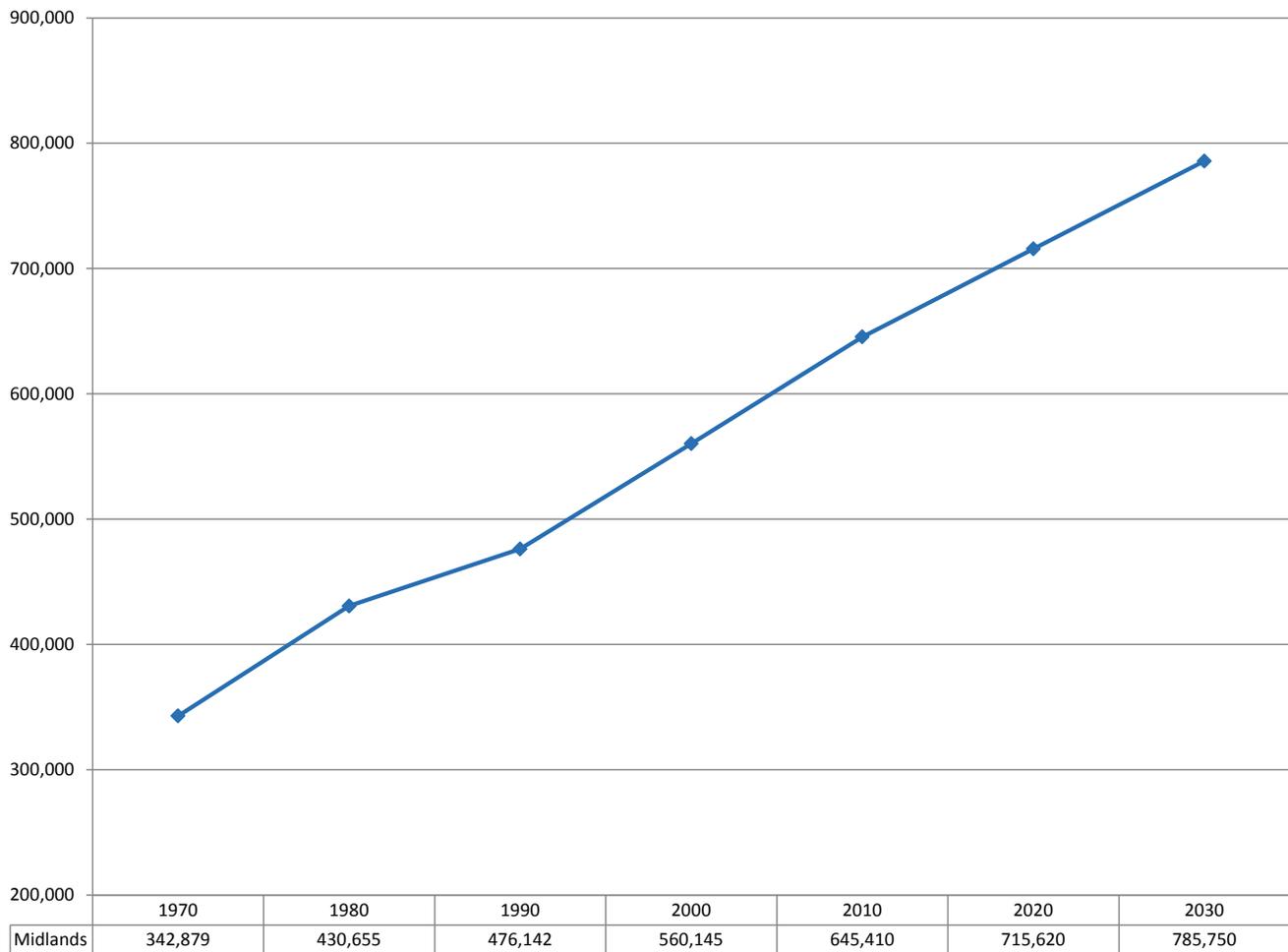
Figure 12: Population by Age

Age Range	Midlands	SC	US
0-4	6.5%	6.5%	6.6%
5-9	6.5%	6.4%	6.6%
10-14	6.5%	6.5%	6.7%
15-19	7.8%	7.2%	7.2%
20-24	8.6%	7.2%	7.0%
25-29	7.4%	6.6%	6.8%
30-34	6.7%	6.2%	6.4%
35-39	6.9%	6.5%	6.6%
40-44	6.8%	6.8%	7.0%
45-49	7.2%	7.2%	7.4%
50-54	6.9%	7.0%	7.2%
55-59	6.1%	6.5%	6.3%
60-64	5.2%	5.9%	5.3%
65-69	3.6%	4.5%	3.9%
70-74	2.5%	3.3%	3.0%
75-79	2.0%	2.5%	2.4%
80-84	1.4%	1.7%	1.9%
85 and older	1.3%	1.5%	1.7%

Source: US Bureau of Census, American Community Survey (ACS)

POPULATION CHANGE AND MIGRATION

Figure 13: Population Projections to 2030



Source: US Census Bureau, Census 2000, SC Department of Health and Environmental Control - Vital Records Department. Population projections calculated by SC Budget and Control Board, Office of Research and Statistics

Figure 14: Population Migration - 2011 - 5-Year Estimate

	Total	Moved From Different State	Moved From Abroad	Moved From Different County	Moved Within Same County
Population 1 year and over	652,213	4.5%	0.6%	4.8%	9.2%
Hispanic or Latino origin (of any race)	30,414	9.9%	3.3%	3.4%	9.8%
White alone, not Hispanic or Latino	377,599	4.2%	0.4%	4.6%	7.7%
Population 25 Years and Over					
Less than high school graduate	50,703	2.4%	0.3%	4.8%	8.9%
High school graduate/GED	107,936	2.1%	0.2%	3.9%	8.2%
Some college or associate's degree	130,447	3.5%	0.5%	3.7%	7.6%
Bachelor's degree	84,112	3.3%	0.6%	3.4%	6.3%
Graduate or professional degree	50,194	3.2%	1.0%	2.9%	4.4%

Source: US Census Bureau, ACS, SCDEW

After a steady increase in population from 1990 to 2000 (up 17.6 percent), the growth of the popu-

lation of this area slowed slightly, growing just over 15 percent over the next 10 years. Growth is projected to increase over 1 percent per year to 2030. In-migration (people moving into Midlands) shows that more than 4 percent of residents with a graduate degree and 3.9 percent of those with a bachelor's degree came from out of state or out of the country. While Hispanics moved into Midlands LWIA from a different state at more than twice the rate of Whites, they moved into Midlands from abroad at over eight times the rate of Whites. As 19 percent of residents over the age of one moved, 5.1 percent came from outside of South Carolina.

COMMUTING PATTERNS

The vast majority of the workers (84 percent) of the Midlands lives and works in the LWIA. The tables in Figure 15 show that 40,300 workers commute in from other areas to work in the Midlands LWIA. Kershaw County draws a notable portion of Midlands LWIA's residents out of the area to work. Over 22,600 more employees commute into the area than leave it to work.

Figure 15: Commuting Patterns - 2010

To Midlands WIA From	40,342	From Midlands To	17,702
Kershaw County, SC	10,375	Kershaw County, SC	2,134
Newberry County, SC	4,252	Newberry County, SC	1,502
Orangeburg County, SC	2,861	Sumter County, SC	1,205
Aiken County, SC	2,740	Orangeburg County, SC	1,127
		Aiken County, SC	933

Source: US Census Bureau, ACS

EDUCATIONAL ATTAINMENT

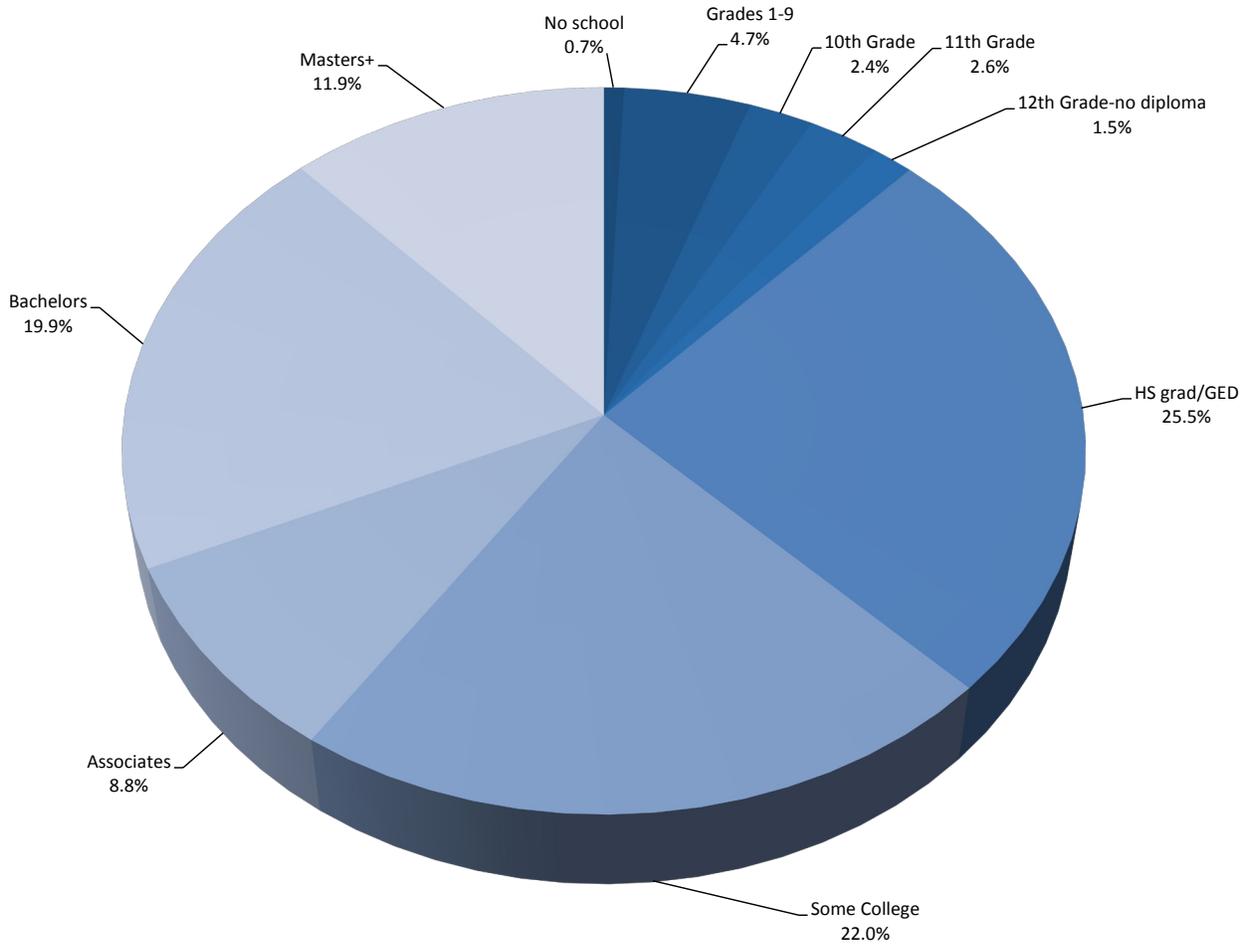
The Midlands LWIA has a lower concentration of residents with a high school diploma or less than the state does as a whole but a higher concentration with more than a high school education than the state as a whole.

Figure 16: Educational Attainment - Midlands and South Carolina 2011

Education Level	Midlands	SC
No school	0.7	1.1
Grades 1-9	4.7	7.0
10th Grade	2.4	3.3
11th Grade	2.6	3.2
12th Grade-no diploma	1.5	1.8
HS grad/GED	25.5	30.9
Some College	22.0	20.1
Associates	8.8	8.4
Bachelors	19.9	15.6
Masters+	11.9	8.6

Source: US Census Bureau, ACS, SCDEW

Figure 17: Educational Attainment - Midlands 2011

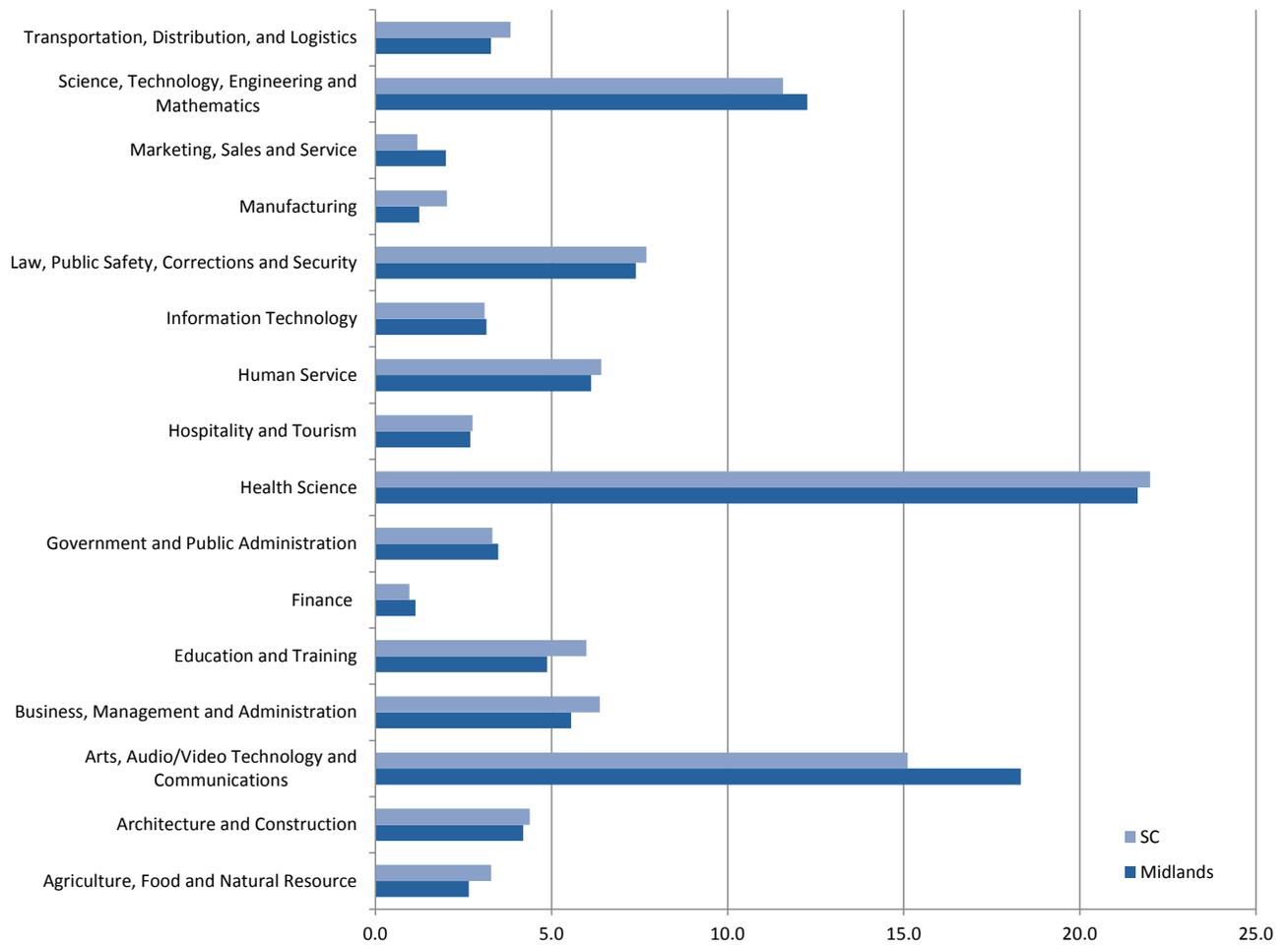


Source: US Census Bureau, ACS, SCDEW

CAREER CLUSTERS SELECTED BY HIGH SCHOOL STUDENTS

Eighth-grade students in South Carolina are required to choose a career cluster to lead them to a post-high school job or college major. There are 16 career clusters.

Figure 18: Percent of Students Declaring a Career Clusters In Midlands and SC - 2012



Note: Declared clusters for students declaring a specific cluster on their primary Electronic Individual Graduation Plan (e-IGP) for 2011-2012 year

Source: SC Department of Education

The Health Science career cluster is the top choice for students in the Midlands area likely in response to news of a shortage of healthcare workers in South Carolina. In keeping with the state trend, the area’s students also picked the Arts, Audio/Video Technology and Communications cluster in notable numbers. Science, Technology, Engineering and Mathematics (STEM) and Law, Public Safety, Corrections and Security clusters were choices for many students.

Figure 19: Career Clusters - 2012

Cluster	Midlands	SC
Agriculture, Food and Natural Resource	2.6	3.3
Architecture and Construction	4.2	4.4
Arts, Audio/Video Technology and Communications	18.3	15.1
Business, Management and Administration	5.6	6.4
Education and Training	4.9	6.0
Finance	1.1	1.0
Government and Public Administration	3.5	3.3
Health Science	21.6	22.0
Hospitality and Tourism	2.7	2.8
Human Service	6.1	6.4
Information Technology	3.2	3.1
Law, Public Safety, Corrections and Security	7.4	7.7
Manufacturing	1.2	2.0
Marketing, Sales and Service	2.0	1.2
Science, Technology, Engineering and Mathematics	12.3	11.6
Transportation, Distribution, and Logistics	3.3	3.8

Source: SC Department of Education

DEGREES AWARDED

In higher education, Midlands' area colleges and universities have conferred a wide variety of awards. Of the top 20, Registered Nursing is the most popular followed by Liberal Arts and Sciences and Social Work. The institutions included in this data are Allen University, Benedict College, Columbia College, Midlands Technical College, and USC-Columbia.

Figure 20: Top 20 Majors in Midlands - 2011

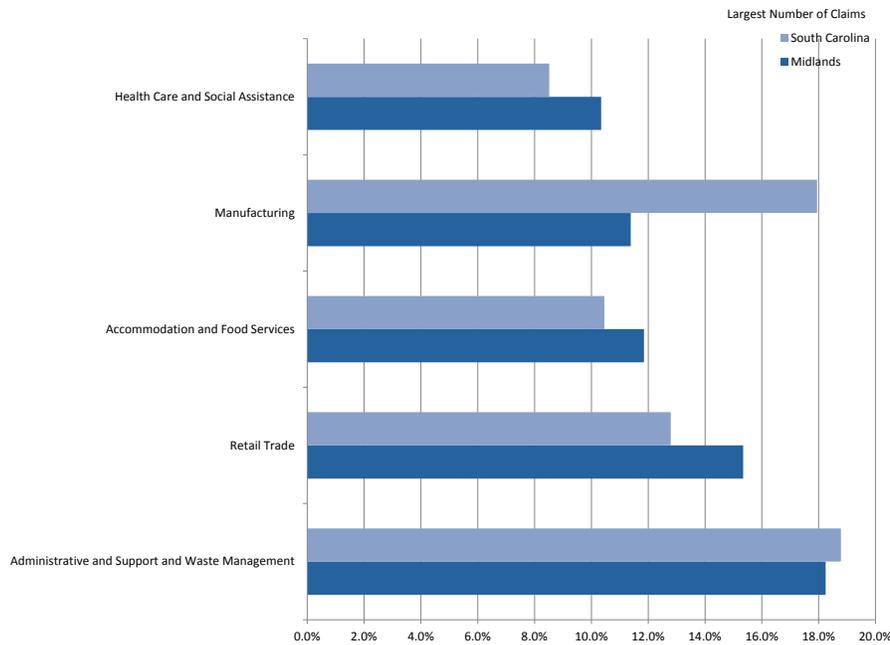
Majors	
Registered Nursing/Registered Nurse	526
Liberal Arts and Sciences/Liberal Studies	396
Social Work	309
Business Administration and Management, General	287
Biology/Biological Sciences, General	287
Experimental Psychology	287
Accounting	267
Law	229
Management	223
Nursing - Registered Nurse Training, BSN Generic	221
Exercise Physiology	207
Education, Other	197
International Business/Trade/Commerce	189
Criminal Justice/Law Enforcement Administration	189
Finance, General	182
Marketing/Marketing Management, General	181
Political Science and Government, General	179
Library and Information Science	166
Sport and Fitness Administration/Management	164
Elementary Education and Teaching	162

Source: SC Commission on Higher Education, http://www.che.sc.gov/New_Web/Data&Pubs.htm

CHARACTERISTICS OF UI CLAIMS BY OCCUPATION

Another source of supply for the workforce is people who are receiving unemployment compensation. In the Midlands LWIA area, the highest number of claims is filed in the Administrative and Support and Waste Management industry, followed by the Retail Trade and Accommodation and Food Services groups. The initial group includes office administrative services; facilities support services; employment services; services to buildings and dwellings; and waste collection, treatment, and disposal services. These sectors highlight the diverse industries in the economy of the Midlands LWIA and their support.

Figure 21: Characteristics of UI Claims by Occupation - April 2013



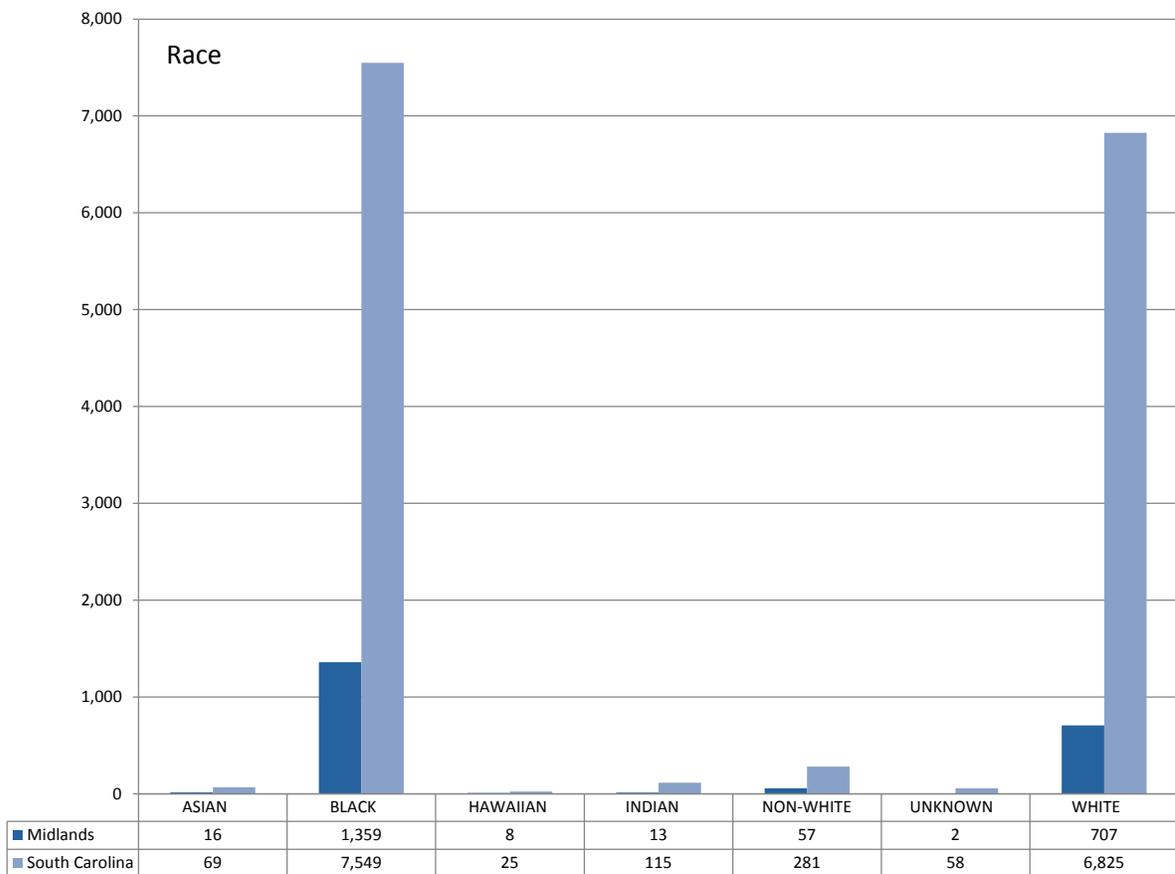
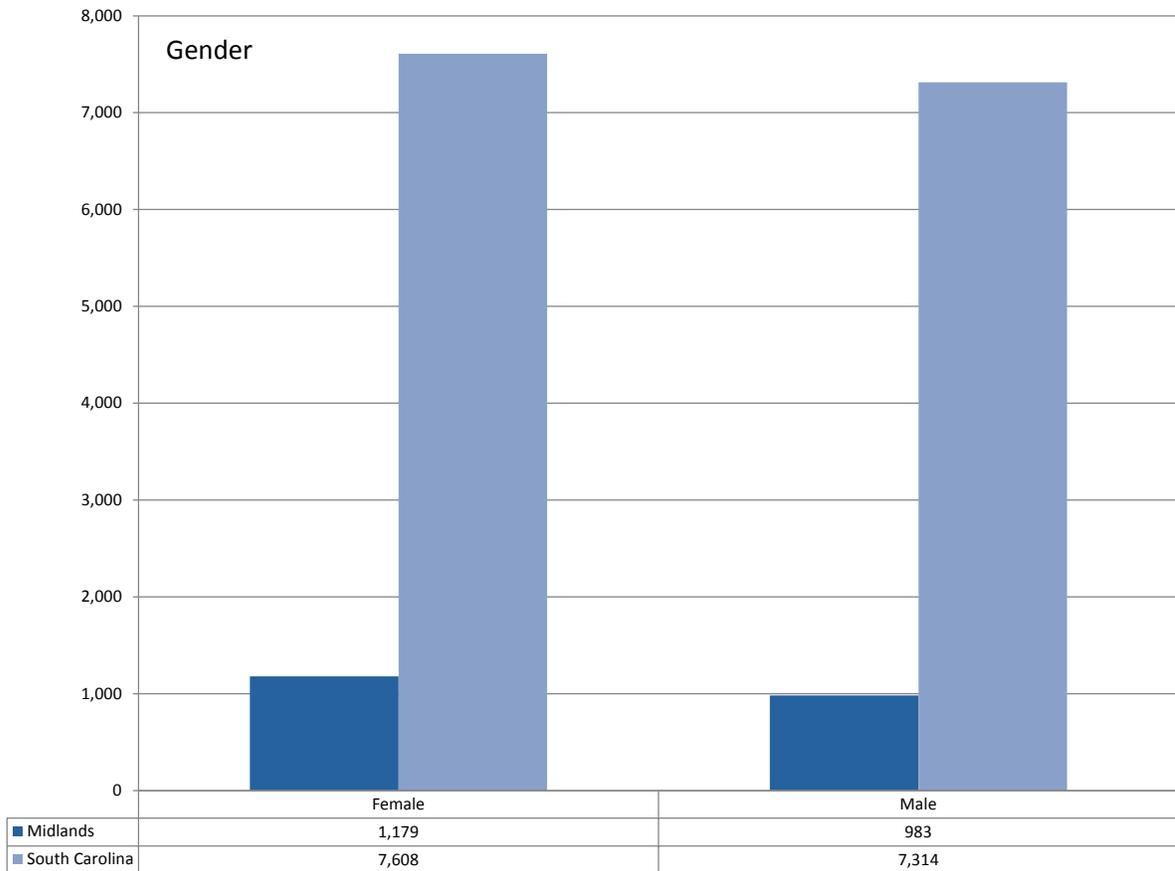
Occupation	Midlands	South Carolina
Administrative and Support and Waste Management	314	2,373
Retail Trade	264	1,616
Accommodation and Food Services	204	1,321
Manufacturing	196	2,267
Health Care and Social Assistance	178	1,076
Professional, Scientific, and Technical Services	91	698
Construction	73	820
Finance and Insurance	73	300
Wholesale Trade	56	445
Educational Services	48	222
Transportation and Warehousing	46	414
Real Estate and Rental and Leasing	41	213
Other Services (except Public Administration)	41	292
Public Administration	41	206
Information	25	122
Agriculture, Forestry, Fishing and Hunting	15	98
Arts, Entertainment, and Recreation	11	94
Utilities	2	22
Management of Companies and Enterprises	2	35

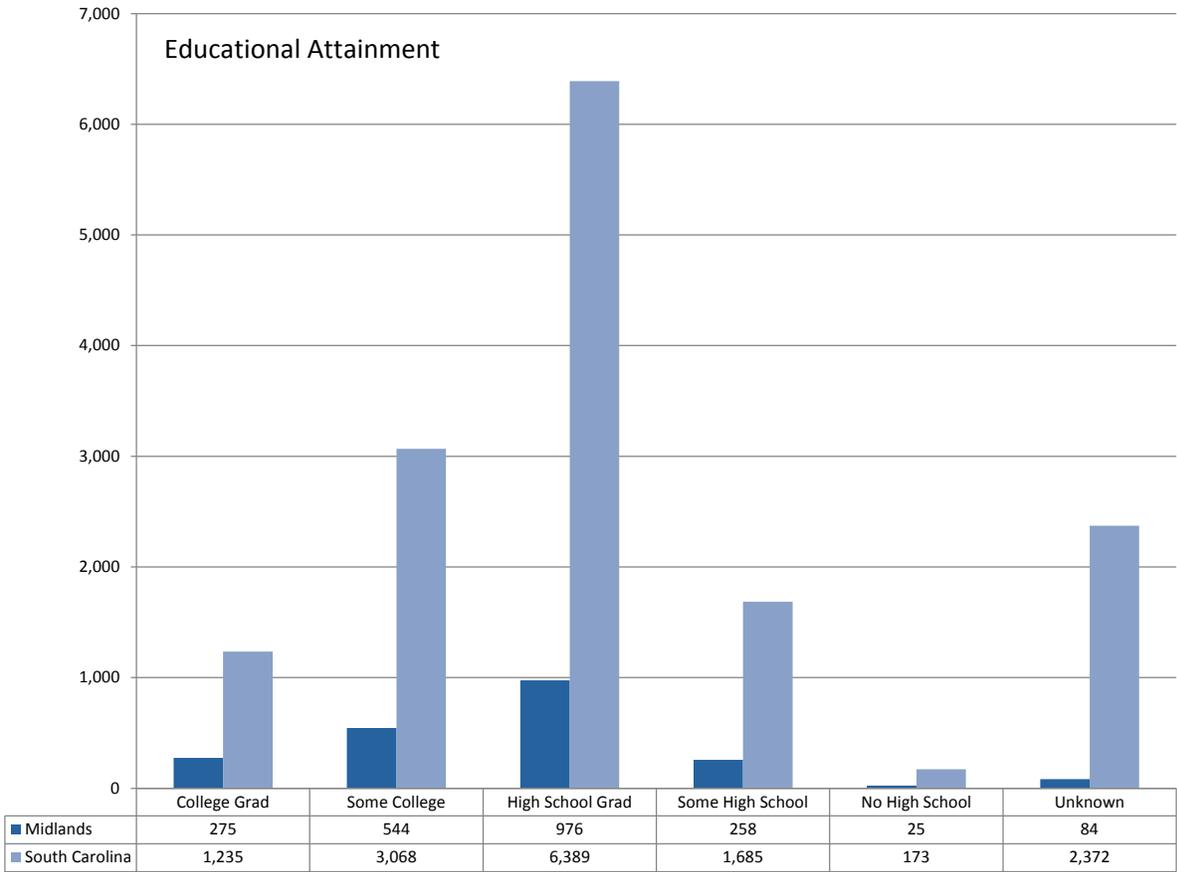
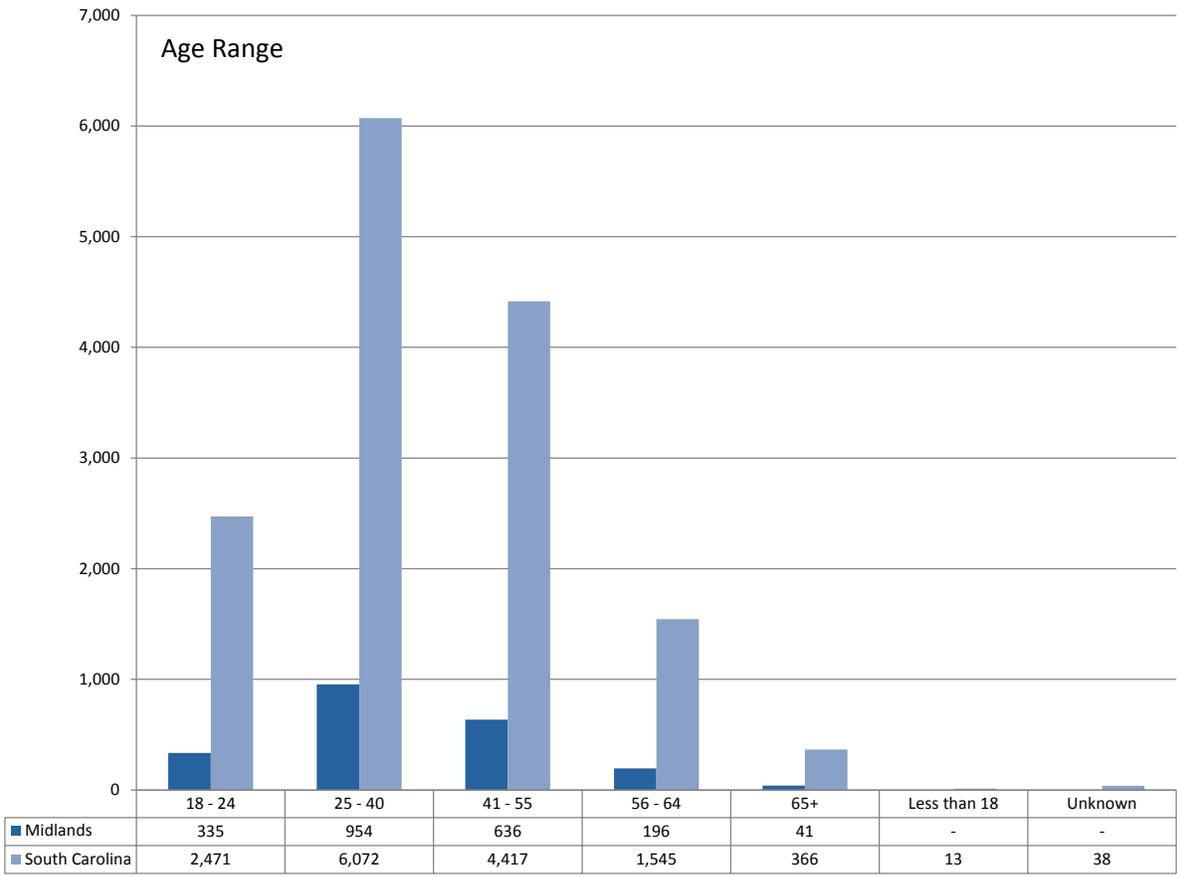
Source: SCDEW

UNEMPLOYMENT INSURANCE CLAIMANT CHARACTERISTICS

The people in this area who were receiving unemployment insurance benefits in April 2013 were typically female, black, 25-40 years old, and were high school graduates or earned a GED.

Figure 22: UI Claimant Characteristics - April 2013





Source: SCDEW

DEMAND: WHAT DO WE NEED?

Workforce demand shows what is needed in an area to support current and future employers. This section examines current (real-time) demand through online job advertisements, industry and occupational projections to 2018, educational requirements for future jobs, and the skills needed for those occupations.

Online job advertisements give a snapshot of what positions need to be filled in an area. The data is from the Conference Board Help Wanted OnLine® Data Series (HWOL) which measures the number of new and reposted job ads from over 16,000 Internet job boards. In April 2013, the largest occupational group with job ads in the Midlands LWIA was Sales and Related Occupations followed by Computer and Mathematical Occupations.

ONLINE JOB ADVERTISEMENTS

Figure 23: Midlands HWOL - April 2013 by Major Group

Occupation	# of Job Ads
Sales and Related Occupations	1657
Computer and Mathematical Occupations	1443
Healthcare Practitioners and Technical Occupations	1410
Office and Administrative Support Occupations	993
Management Occupations	917
Miscellaneous	897
Transportation and Material Moving Occupations	835
Business and Financial Operations Occupations	654
Installation, Maintenance, and Repair Occupations	618
Food Preparation and Serving Related Occupations	559
Construction and Extraction Occupations	470
Architecture and Engineering Occupations	360
Healthcare Support Occupations	332
Education, Training, and Library Occupations	307
Production Occupations	306
Building and Grounds Cleaning and Maintenance Occupations	282
Personal Care and Service Occupations	195
Arts, Design, Entertainment, Sports, and Media Occupations	185
Protective Service Occupations	184
Community and Social Services Occupations	133
Legal Occupations	108
Life, Physical, and Social Science Occupations	54
Farming, Fishing, and Forestry Occupations	11
Military Specific Occupations	3

Note: A job advertisement may include multiple openings.

Source: The Conference Board Help Wanted OnLine® Data Series (HWOL)

INDUSTRY PROJECTIONS

The Health Care and Social Assistance industry is projected to have the largest increase in employment from 2008 to 2018, growing by 9,809 jobs or 981 jobs/year. This sector includes services

such as ambulatory health care services, hospitals, nursing and residential care facilities, and social assistance services. The Educational Services category reports the next largest growth with a projected 517 openings/year followed by Retail Trade with 390 jobs/year.

Figure 24: Industry Projections - 2008-2018

Industry	Estimate Employment (2008)	Projected Employment (2018)	Change	Percent Change	Annual Percent Change
Total Employment, All Jobs	351,157	387,521	36,364	10.36	0.99
Health Care and Social Assistance	41,808	51,617	9,809	23.46	2.13
Educational Services	31,231	36,400	5,169	16.55	1.54
Retail Trade	36,857	40,756	3,899	10.58	1.01
Professional, Scientific, and Technical Services	13,442	16,803	3,361	25.00	2.26
Finance and Insurance	22,564	25,367	2,803	12.42	1.18
Wholesale Trade	13,388	15,694	2,306	17.22	1.60
Other Services (Except Government)	14,881	16,972	2,091	14.05	1.32
Accommodation and Food Services	26,403	28,372	1,969	7.46	0.72
Construction	16,329	18,293	1,964	12.03	1.14
Administrative and Support and Waste Management and Remediation	19,126	20,349	1,223	6.39	0.62
Arts, Entertainment, and Recreation	3,097	3,766	669	21.60	1.98
Transportation and Warehousing	6,704	7,335	631	9.41	0.90
Management of Companies and Enterprises	4,169	4,664	495	11.87	1.13
Government	36,618	37,015	397	1.08	0.11
Real Estate and Rental and Leasing	4,888	5,145	257	5.26	0.51
Utilities	3,663	3,737	74	2.02	0.20
Mining	266	240	-26	-9.77	-1.02
Information	5,380	5,189	-191	-3.55	-0.36
Agriculture, Forestry, Fishing and Hunting	2,502	2,100	-402	-16.07	-1.74
Manufacturing	23,581	22,003	-1,578	-6.69	-0.69

Source: BLS, SCDEW, QCEW, WI

OCCUPATIONAL PROJECTIONS

Many of the occupations that are projected to have numerous openings between 2008 and 2018 in this area support a growing economy. Healthcare occupations lead the projected employment listing with over half of the top 20 positions, as shown in Figure 25.

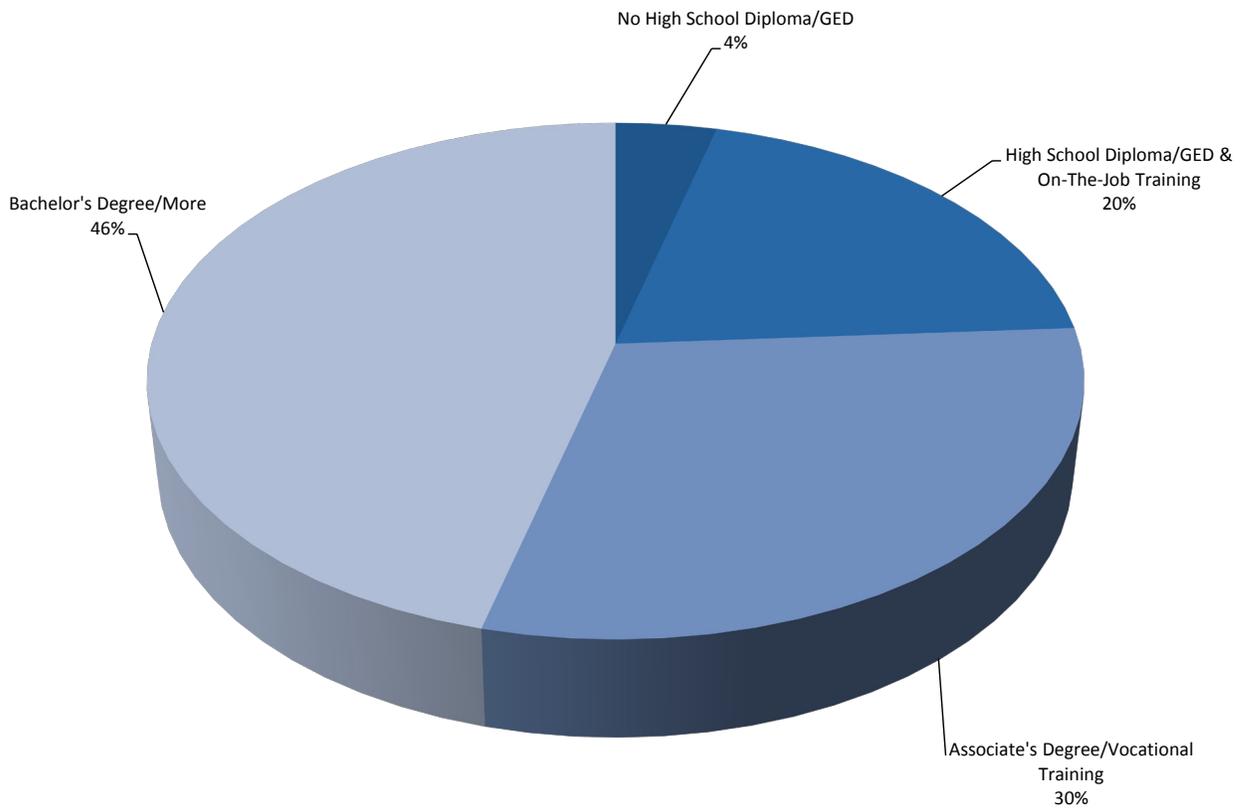
Figure 25: Growing Occupations - 2008-2018

Occupation	Estimated Employment (2008)	Projected Employment (2018)
Insurance Sales Agents	2,725	3,494
Medical Assistants	1,122	1,503
Personal and Home Care Aides	949	1,417
Self-Enrichment Education Teachers	941	1,332
Pharmacy Technicians	971	1,288
Fitness Trainers and Aerobics Instructors	959	1,224
Dental Assistants	752	1,018
Education Administrators, All Other	419	554
Physical Therapists	415	543
Respiratory Therapists	361	462
Surgical Technologists	347	452
Dental Hygienists	331	449
Coaches and Scouts	346	447
Medical Equipment Repairers	185	249
Internists, General	179	231
Physical Therapist Assistants	149	194
Veterinary Technologists and Technicians	138	180
Audio and Video Equipment Technicians	104	143
Surgeons	92	119
Physician Assistants	86	116

Source: BLS, SCDEW, OES, WI

Of the top 50 projected growing occupations by percent change, ten require a high school diploma or GED, two require less than a high school diploma or GED, 23 require a bachelor's degree or higher, and 15 need an associate's degree or require some kind of postsecondary training. Each of the two requiring less than a high school diploma or GED requires short-term on-the-job training (OJT), which is defined by the US Department of Labor as less than one month.

Figure 26: Education for Top 50 Projected Occupations



Source: BLS, SCDEW, OES, WI

It is just as important to know which occupations are declining in the area. Declines are often due to technological advances (i.e. computers or robots replacing humans), so many of the declining occupations are projected to be manual labor jobs, as shown in Figure 27.

Figure 27: Top 20 Projected Declining Occupations in Midlands - 2008-2018

Occupation
Computer Operators
Cutting, Punching, and Press Machine Setters
Data Entry Keyers
Electrical and Electronic Equipment Assemblers
Fiberglass Laminators and Fabricators
File Clerks
Heat Treating Equipment Setters, Operators
Industrial Engineering Technicians
Machine Feeders and Offbearers
Mail Clerks and Mail Machine Operators
Numerical Tool and Process Control Programmers
Office Machine Operators, Except Computer
Order Clerks
Postal Service Clerks
Postal Service Mail Sorters, Processors
Postmasters and Mail Superintendents
Switchboard Operators, Including Answering Service
Tool and Die Makers
Travel Agents
Word Processors and Typists

Source: BLS, SCDEW, OES, WI

SKILLS OF PROJECTED OCCUPATIONS

Using the top 50 projected occupations, the skill levels needed for the future workforce based on the definitions given earlier in this report can be categorized.

Figure 28: Skill Levels

Low	3
Middle	24
High	23

Source: BLS, SCDEW, OES, WI

Low-skilled jobs often have commensurate (i.e. low) pay and do not require much education, experience, or OJT. Does the supply of workers have the right skills for the jobs in the future?

WORKFORCE CHALLENGES

The current economic situation in the Midlands LWIA, the supply of workers, and the characteristics of workers who will be in demand has been reviewed. What can be gleaned from these findings? Are there gaps between supply and demand?

Supply Findings

The population should grow to 2030, and with a larger-than-the-state share of 15-39 year olds in their prime working age, this area looks to have a proper mix of workers. In addition, in-migration from other states/countries adds residents at the top end of the educational spectrum. The LWIA has a higher percent of residents aged 25 and older with at least a high school diploma than the state does as a whole.

Many high school students selected the Health Science career cluster in keeping with state trends. The next most popular career cluster was Arts, Audio/Video/Technology, and Communications followed by STEM.

Demand Findings

Employer demand was consistent between online advertisements (current) and 2018 projected occupations (long-term needs) in general. Both had the need for workers in Marketing, Sales, and Service; Health Science; and Business, Management, and Administration. Information Technology was a short-term need, while Hospitality and Tourism was a long-term need. Most of the top projected occupations require at least a high school diploma or GED.

Figure 29: Comparison of Supply and Demand

	Demand		Supply	
	Top online ads	Projected Occupations	Degrees Earned	Career Clusters Selected
Agriculture, Food and Natural Resource	1.3	1.4	0.1	2.6
Architecture and Construction	5.7	5.7	0.6	4.2
Arts, Audio/Video Technology and Communications	2.0	1.7	5.4	18.3
Business, Management and Administration	16.0	19.7	14.1	5.6
Education and Training	2.4	7.5	20.4	4.9
Finance	5.3	4.2	2.0	1.1
Government and Public Administration	0.2	0.4	2.7	3.5
Health Science	15.6	11.1	21.0	21.6
Hospitality and Tourism	4.1	10.0	1.6	2.7
Human Service	4.2	5.2	5.8	6.1
Information Technology	12.2	2.6	1.5	3.2
Law, Public Safety, Corrections and Security	1.8	3.4	5.5	7.4
Manufacturing	2.5	3.7	1.4	1.2
Marketing, Sales and Service	15.3	15.8	3.7	2.0
Science, Technology, Engineering and Mathematics	2.8	1.9	12.9	12.3
Transportation, Distribution, and Logistics	8.5	5.9	1.3	3.3

Source: BLS, SCDEW, WI, SC Department of Education, OES, HWOL

A few observations about the comparison that could be considered challenges to the workforce pipeline include:

- There is an overabundance of students and graduates to meet demand in Health Science and STEM and an undersupply in Marketing, Sales and Service.
- There is a severe mismatch in supply and demand in the workforce in the short-term in Architecture and Construction; Education and Training; Information Technology; and Transportation, Distribution, and Logistics.
- In the long-term, there is a severe mismatch in supply and demand in the workforce in Arts, Audio/Video Technology and Communications; Business, Management and Administration; Law, Public Safety, Corrections and Security; and Hospitality and Tourism.

There is always a demand for employees with soft skills. It is said that hard skills (training, degrees, or certification) get you hired, but soft skills get you fired. Many of our residents need to learn or get a refresher in soft skills in order to KEEP their jobs. Employers see the need.

Top 10 Soft Skills Found in Online Ads for South Carolina (April 2013)

1. Oral and written communication skills
2. Customer service oriented
3. Problem solving
4. Detail oriented
5. Microsoft Office
6. Self-starting / Self-motivated
7. Organizational skills
8. Troubleshooting
9. Work independently
10. Sales experience

Source: The Conference Board Help Wanted OnLine® Data Series (HWOL)

CONCLUSION

The Midlands LWIA area overall encompasses an economy dependent on health care, retail trade, and education. The population continues to increase, and the education level for the population is higher than the state as a whole at the high end with higher percentages of residents with a high school diploma or more. The workforce (current and potential) does face challenges in having the proper mix of employer demand being met by trained applicants. The majority of employers are advertising for jobs in health care; business, management, and administration; information technology; or marketing and sales. However, some supply flows could be fine-tuned to be more in line with demand.

The data shows that:

- There is an undersupply of today's students choosing the fields of Business, Management and Administration; Hospitality and Tourism; and Marketing, Sales and Service to meet the LWIA's future demand.
- There is an oversupply of today's students choosing the areas of Arts, Audio/Video Technology and Communication; Science, Technology, Engineering and Mathematics; and Health Science that will far outpace the area's long-term demand.
- Comprehensive soft skills training is needed for all students and job seekers (high school, post-secondary, adult, new and returning entrants to the labor force, and incumbent workers) so that they can not only get hired but retain their positions and thus reduce employee turnover.

Getting education in line with the demands of employers will help the Midlands LWIA meet the challenges it faces.

PEE DEE LWIA WORKFORCE REPORT 2012



The *Pee Dee Workforce Report* is published by the Labor Market Information (LMI) Department of the South Carolina Department of Employment and Workforce. The information and analyses provided in this publication are based on data collected from sources throughout South Carolina and the United States.

About SC DEW and LMI:

The Labor Market Information Department compiles and publishes employment statistics, job forecasts, wage data, demographics, and other labor market information to help public and private organizations, researchers, and others better understand today's complex workforce.

The LMI Department produced this report under the leadership of:

Executive Director - Cheryl Stanton
Interim Deputy Assistant Executive Director - Kerry Paul
Labor Market Information Director - Brenda Lisbon

South Carolina Department of Employment and Workforce
1550 Gadsden Street
Columbia, South Carolina 29201
(803) 737-2660
www.dew.sc.gov
www.scworkforceinfo.com



TABLE OF CONTENTS

EXECUTIVE SUMMARY	VI
INTRODUCTION	VII
ECONOMIC DISCUSSION: A CURRENT PICTURE OF THE WORKFORCE	1
EMPLOYMENT BY INDUSTRY	1
LOCATION QUOTIENT	1
AVERAGE ANNUAL WAGE BY INDUSTRY	2
OCCUPATIONAL EMPLOYMENT	3
SKILLS DATA.....	4
EMPLOYMENT AND UNEMPLOYMENT	6
NEW STARTUP FIRMS	8
EMPLOYERS BY SIZE OF ESTABLISHMENT	9
SUPPLY: WHAT'S OUT THERE?	10
POPULATION BY AGE	10
POPULATION CHANGE AND MIGRATION	11
COMMUTING PATTERNS	12
EDUCATIONAL ATTAINMENT	12
CAREER CLUSTERS SELECTED BY HIGH SCHOOL STUDENTS	13
DEGREES AWARDED	15
CHARACTERISTICS OF UI CLAIMS BY OCCUPATION	16
UNEMPLOYMENT INSURANCE CLAIMANT CHARACTERISTICS.....	17
DEMAND: WHAT DO WE NEED?	20
ONLINE JOB ADVERTISEMENTS.....	20
INDUSTRY PROJECTIONS	20
OCCUPATIONAL PROJECTIONS	21
SKILLS OF PROJECTED OCCUPATIONS	24
WORKFORCE CHALLENGES	25
CONCLUSION	27

TABLE OF FIGURES

FIGURE 1: PEE DEE LWIA EMPLOYMENT BY INDUSTRY - 3RD QUARTER 2012.....	1
FIGURE 2: NOTABLE PEE DEE LWIA LOCATION QUOTIENTS - 2011	2
FIGURE 3: ANNUAL AVERAGE WAGE BY INDUSTRY - 3RD QUARTER 2012.....	3
FIGURE 4: TOP 20 OCCUPATIONS WITH WAGES - 2012.....	4
FIGURE 5: TOP OCCUPATIONS BY SKILL CLASSIFICATION - PEE DEE 2012.....	5
FIGURE 6: EMPLOYMENT - 2002-2012.....	6
FIGURE 7: UNEMPLOYMENT - 2002-2012	7
FIGURE 8: ANNUAL UNEMPLOYMENT - 2002-2012	8
FIGURE 9: MONTHLY UNEMPLOYMENT RATE - MARCH 2011-APRIL 2013.....	8
FIGURE 10: NEW STARTUP FIRMS - 2007-2012.....	9
FIGURE 11: EMPLOYERS BY SIZE OF ESTABLISHMENT - 3RD QUARTER 2012.....	9
FIGURE 12: POPULATION BY AGE	10
FIGURE 13: POPULATION PROJECTIONS TO 2030.....	11
FIGURE 14: POPULATION MIGRATION - 2011 - 5-YEAR ESTIMATE.....	11
FIGURE 15: COMMUTING PATTERNS - 2010.....	12
FIGURE 16: EDUCATIONAL ATTAINMENT - PEE DEE AND SOUTH CAROLINA 2011	12
FIGURE 17: EDUCATIONAL ATTAINMENT - PEE DEE 2011	13
FIGURE 18: PERCENT OF STUDENTS DECLARING A CAREER CLUSTERS IN PEE DEE AND SC - 2012	14
FIGURE 19: CAREER CLUSTERS - 2012.....	15
FIGURE 20: TOP 20 MAJORS IN PEE DEE - 2011	16
FIGURE 21: CHARACTERISTICS OF UI CLAIMS BY OCCUPATION - APRIL 2013.....	17
FIGURE 22: UI CLAIMANT CHARACTERISTICS - APRIL 2013.....	18
FIGURE 23: PEE DEE HWOL - APRIL 2013 BY MAJOR GROUP.....	20
FIGURE 24: INDUSTRY PROJECTIONS - 2008-2018	21
FIGURE 25: GROWING OCCUPATIONS - 2008-2018.....	22
FIGURE 26: EDUCATION FOR TOP 50 PROJECTED OCCUPATIONS	23
FIGURE 27: TOP 20 PROJECTED DECLINING OCCUPATIONS IN PEE DEE - 2008-2018.....	24
FIGURE 28: SKILL LEVELS.....	24
FIGURE 29: COMPARISON OF SUPPLY AND DEMAND.....	25

EXECUTIVE SUMMARY

The employment leaders for Pee Dee Local Workforce Investment Area (LWIA) are Health Care and Social Assistance and Manufacturing. Employment growth is anticipated by 2018 in several industries, especially Health Care and Social Assistance and Educational Services. The highest wages are paid by the Utilities and Professional, Scientific, and Technical Services industries.

The Pee Dee LWIA's population has grown by under one percent per year since 2000 and has fewer residents aged 20 to 29 than the state's average.

Employment is rising and unemployment is declining. Pee Dee LWIA has a historically higher unemployment rate than the state, and it remained so during and after the recession. Employment is concentrated in the Florence area, and nearly 4,000 more people leave the Pee Dee for work than enter it every day. Manufacturing and Administrative and Support and Waste Management are the largest two industries represented in unemployment claims. The latter sector includes office administrative services; facilities support services; employment services; services to buildings and dwellings; and waste collection, treatment, and disposal services.

Pee Dee has a lower proportion of residents with more than a high school education than the state does as a whole. For projected growing jobs, 2 percent require no high school diploma or GED, 28 percent require a high school diploma or GED, 30 percent require an associate's degree or training, and 40 percent require a bachelor's degree or higher.

Pee Dee LWIA businesses desire a trained workforce with the current focus being on business, marketing, and healthcare. Technology has become part of most occupations, requiring continuous training and skill-upgrading. A challenge for the Pee Dee LWIA is to match the skill levels of the workforce with open positions. There may be a mismatch between the employer's skill demands and the occupations that the worker will accept.

While there are some bright spots for the Pee Dee LWIA, it has significant challenges ahead. A barely growing population, high unemployment rates, low bachelor's degree attainment, and economic stagnation are all negatively impacting the area. The patterns and trends described in this report offer cause for both optimism and concern. While some metrics are improving, several issues will require attention and planning to ensure future growth and prosperity for the Pee Dee LWIA.

INTRODUCTION

The Pee Dee Local Workforce Investment Area is composed of Chesterfield, Darlington, Dillon, Florence, Marion, and Marlboro counties and is located in the eastern part of the state. The LWIA borders North Carolina and is home to the Sandhills National Wildlife Refuge, the Darlington Raceway, and Sandhills State Forest.

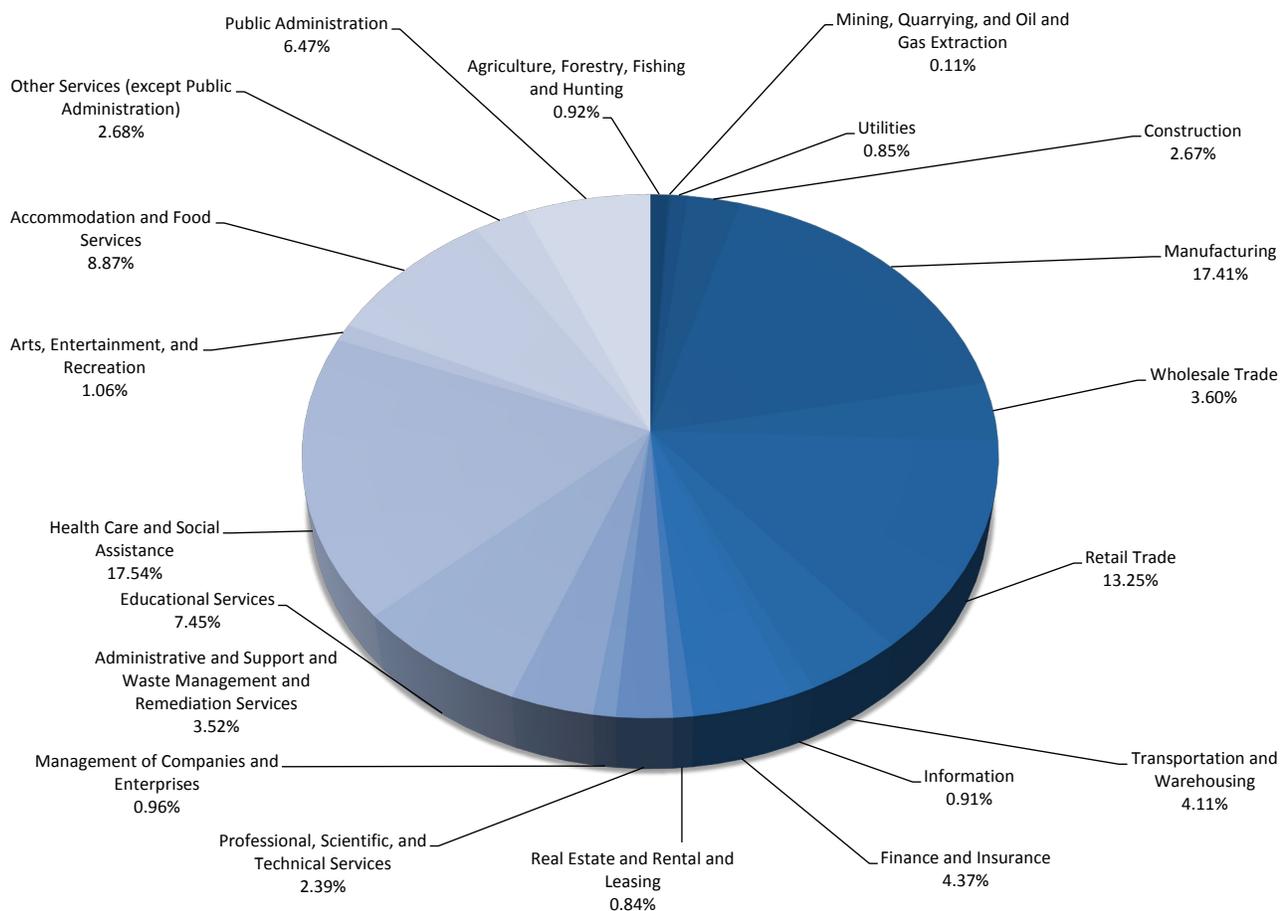
The economic changes this year in the Pee Dee LWIA demonstrate the shifting needs of employers and employees. Cultivating an understanding of the workforce allows all six counties to respond to anticipated future needs. Analyses help to identify the gap between what the workforce has in the way of talent and skills (supply), and what it may need in the future (demand).

The purpose of the Pee Dee LWIA Workforce Report is to present a comprehensive view of the status of Pee Dee LWIA's economy and workforce. The report includes an analysis of Pee Dee LWIA's workforce, industries, economic climate, and factors that will affect all. Forecasts will be made for the workforce, industries, and the economy.

ECONOMIC DISCUSSION: A CURRENT PICTURE OF THE WORKFORCE

EMPLOYMENT BY INDUSTRY

Figure 1: Pee Dee LWIA Employment By Industry - 3rd Quarter 2012



Source: Bureau of Labor Statistics (BLS), SC Department of Employment and Workforce (SCDEW), Quarterly Census of Employment and Wages (QCEW)

Health Care and Social Assistance and Manufacturing are the top two industries employing workers in the Pee Dee LWIA. Industries like Educational Services and Health Care and Social Assistance are healthy and flourishing, while others like Construction are still recovering from the recession. The 2010 per capita income for a Pee Dee LWIA resident was \$26,654, which was an increase of 31.9 percent from 2000.¹ Economic growth has taken place in the past decade to enhance the LWIA workforce, although the area is still recovering from a tough business cycle.

LOCATION QUOTIENT

A location quotient (LQ) is a useful tool for determining the concentration of workers in a given area. Location quotients compare the regional share of employment in a particular industry to the national share of employment in the same industry. The resulting quotient reveals the degree of regional specialization or concentration in an industry and provides insight into what makes the area unique in comparison to the national average. An LQ of 1.0 means the concentration of jobs in that industry matches the nation's value. Location quotients higher than 1.0 indicate the level of specialization the area has in particular sectors. Lower quotients can indicate possible industries that could be expanded.

Figure 2: Notable Pee Dee LWIA Location Quotients - 2011

Industry and Sectors	Location Quotient
<i>Chesterfield County</i>	
Textile Mills	47.3
Fabricated Metal Product Manufacturing	16.3
Forestry and Logging	7.6
<i>Darlington County</i>	
Forestry and Logging	4.3
Repair and Maintenance	3.5
Manufacturing	2.3
<i>Dillon County</i>	
Miscellaneous Retail Stores	5.6
Gasoline Stations	3.2
Manufacturing	2.6
<i>Florence County</i>	
Forestry and Logging	7.1
Chemical Manufacturing	4.2
Paper Manufacturing	3.8
<i>Marion County</i>	
Transportation Equipment Manufacturing	7.8
Forestry and Logging	6.7
Wood Product Manufacturing	4.2
<i>Marlboro County</i>	
Manufacturing	4.3
Gasoline Stations	2.8
Crop Production	2.3

Source: US Department of Labor, Bureau of Labor Statistics - http://data.bls.gov/location_quotient

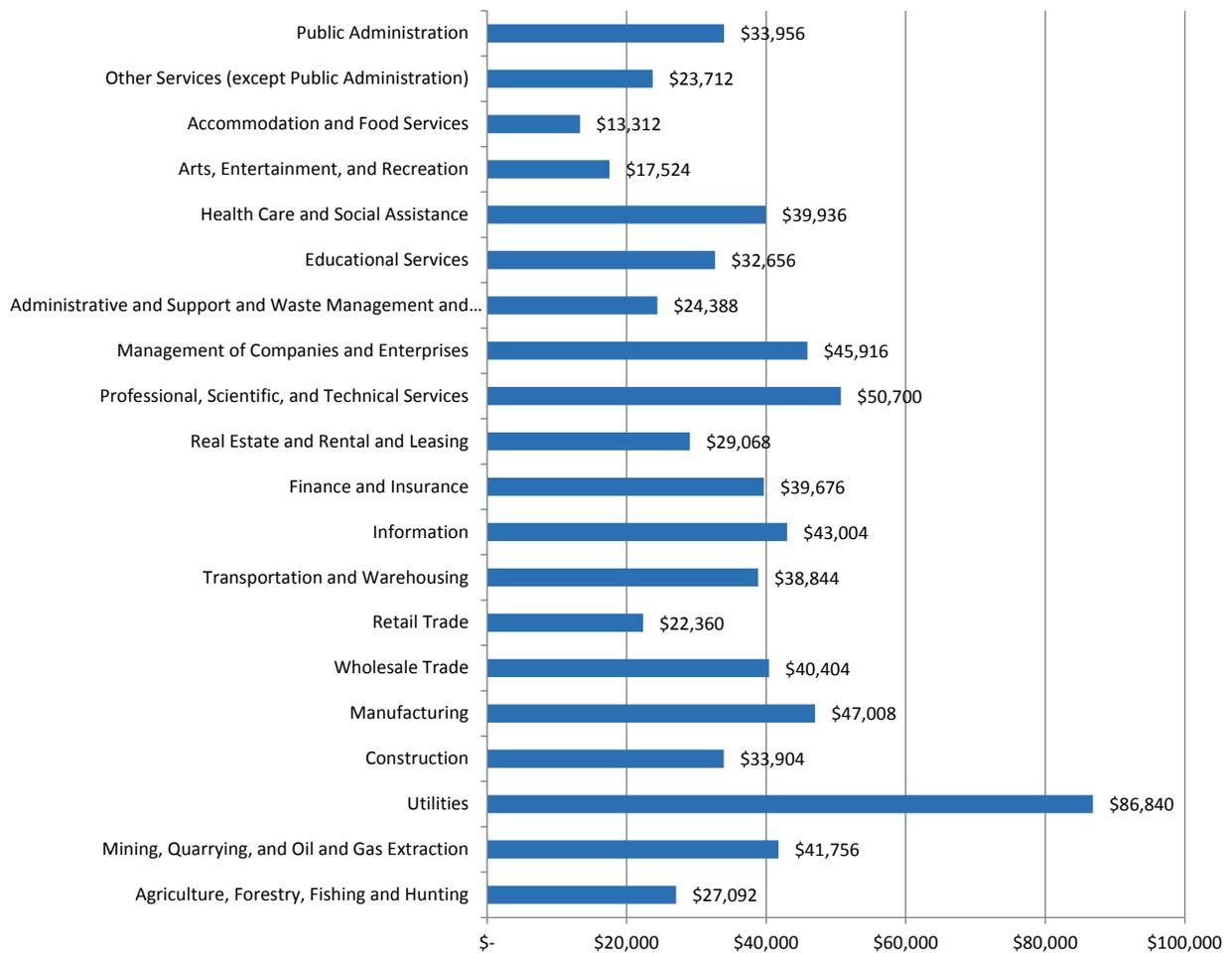
Textile Mills have the highest location quotient in the area at 47.3 in Chesterfield County. Manufacturing industries are among the most concentrated sectors in this area with location quotients from 2.3 to 16.3. These industries located throughout the area include Paper, Fabricated Metal Product, Chemical, Wood Product, and Transportation Equipment. Other notable sectors in the Pee Dee LWIA are Repair and Maintenance in Darlington County, Miscellaneous Retail Stores in Dillon County, Crop Production in Marlboro County, and Forestry and Logging throughout the Pee Dee LWIA.

AVERAGE ANNUAL WAGE BY INDUSTRY

The annual wages for the Utilities sector employees are the highest for any Pee Dee LWIA industry. Professional, Scientific, and Technical Service workers are the second highest paid group of employees in the area.

A high wage industry like Professional, Scientific, and Technical Services usually requires at least a bachelor’s degree. Having an education is an excellent way to enter a high-wage industry and have more options for employment.

Figure 3: Annual Average Wage by Industry - 3rd Quarter 2012



Source: BLS, SCDEW, QCEW

OCCUPATIONAL EMPLOYMENT

When examining the current occupational employment in the area, one can observe that some of the top 20 occupations are low-skill, low-pay jobs. These jobs, like Cashiers, Stock Clerks, and Food Preparers, have high turnover. These are not necessarily the most robust jobs as far as wages, but they are jobs.

Figure 4 lists occupations, such as Registered Nurses, First-Line Supervisors, and School Teachers, that pay a higher wage. With Health Care and Social Assistance, Manufacturing, and Retail Trade sectors comprising over 48 percent of the employment in the Pee Dee LWIA, the positions of Retail Salespersons; Elementary School Teachers; and Registered Nurses, not surprisingly, are listed among the top occupations.

Figure 4: Top 20 Occupations with Wages - 2012

Occupational Title	Total Employment	Hourly Average Wage (\$)
All Occupations	44,100	15.96
Cashiers	1,900	8.54
Combined Food Preparation and Serving Workers, Including Fast Food	1,360	8.14
Team Assemblers	1,080	14.37
Retail Salespersons	1,060	11.14
Correctional Officers and Jailers	1,010	15.22
Registered Nurses	860	25.94
Textile Winding, Twisting, and Drawing Out Machine Setters, Operators, and Tenders	860	12.86
Elementary School Teachers, Except Special Education	820	21.43
Teacher Assistants	820	9.36
Office Clerks, General	780	10.93
Nursing Assistants	770	9.65
Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	760	12.49
Laborers and Freight, Stock, and Material Movers, Hand	760	13.14
Packers and Packagers, Hand	760	12.03
Secondary School Teachers, Except Special and Career/Technical Education	690	21.98
Stock Clerks and Order Fillers	650	11.64
First-Line Supervisors of Retail Sales Workers	590	18.39
Maintenance and Repair Workers, General	560	15.58
Customer Service Representatives	550	13.12
Janitors and Cleaners, Except Maids and Housekeeping Cleaners	530	9.90

Source: BLS, SCDEW, Occupational Employment Statistics (OES)

SKILLS DATA

Employers are beginning to see that a person’s skills, in addition to their education, may help in determining who to hire. Many times the degree is not as important as the skills gained through specialized training and/or experience. In order to be able to determine the current level of skills in the area, the top 50 current occupations by employment are presented, and assigned a low, middle, or high skill designation to that occupation. The definitions for those skills levels are:

- LOW: No high school or GED, or high school/GED with less than one year experience and no on-the-job-training (OJT), or short-term OJT
- MIDDLE: High school/GED with one year experience, or moderate OJT, or long-term OJT, or apprenticeship, or postsecondary vocational training, or some college, or Associate’s Degree, or less than a Bachelor’s Degree
- HIGH: Bachelor’s Degree or higher

In the Pee Dee area, 23 of the top 50 jobs in 2012 are considered low-skill jobs. Twenty-three are middle skill, and four are high-skill occupations.

Figure 5: Top Occupations By Skill Classification - Pee Dee 2012

Skillset: LOW
Cashiers
Combined Food Preparation and Serving Workers, Including Fast Food
Cooks, Fast Food
Cooks, Institution and Cafeteria
Customer Service Representatives
Home Health Aides
Industrial Truck and Tractor Operators
Janitors and Cleaners, Except Maids and Housekeeping Cleaners
Laborers and Freight, Stock, and Material Movers, Hand
Landscaping and Groundskeeping Workers
Maids and Housekeeping Cleaners
Office Clerks, General
Packers and Packagers, Hand
Personal Care Aides
Retail Salespersons
Secretaries and Administrative Assistants, Except Legal, Medical, and Executive
Sewing Machine Operators
Shipping, Receiving, and Traffic Clerks
Social and Human Service Assistants
Stock Clerks and Order Fillers
Teacher Assistants
Tellers
Waiters and Waitresses
Skillset: MIDDLE
Bookkeeping, Accounting, and Auditing Clerks
Correctional Officers and Jailers
Cutting, Punching, and Press Machine Setters, Operators, and Tenders, Metal and Plastic
Electricians
Emergency Medical Technicians and Paramedics
First-Line Supervisors of Food Preparation and Serving Workers
First-Line Supervisors of Office and Administrative Support Workers
First-Line Supervisors of Production and Operating Workers
First-Line Supervisors of Retail Sales Workers
General and Operations Managers
Heavy and Tractor-Trailer Truck Drivers
Industrial Machinery Mechanics
Inspectors, Testers, Sorters, Samplers, and Weighers
Licensed Practical and Licensed Vocational Nurses
Machinists
Maintenance and Repair Workers, General
Nursing Assistants
Police and Sheriff's Patrol Officers
Registered Nurses
Sales Representatives, Wholesale and Manufacturing, Except Technical and Scientific Products
Substitute Teachers
Team Assemblers
Textile Winding, Twisting, and Drawing Out Machine Setters, Operators, and Tenders
Skillset: HIGH
Child, Family, and School Social Workers
Elementary School Teachers, Except Special Education
Middle School Teachers, Except Special and Career/Technical Education
Secondary School Teachers, Except Special and Career/Technical Education

Source: BLS, SCDEW, OES, Workforce Intelligence (WI)

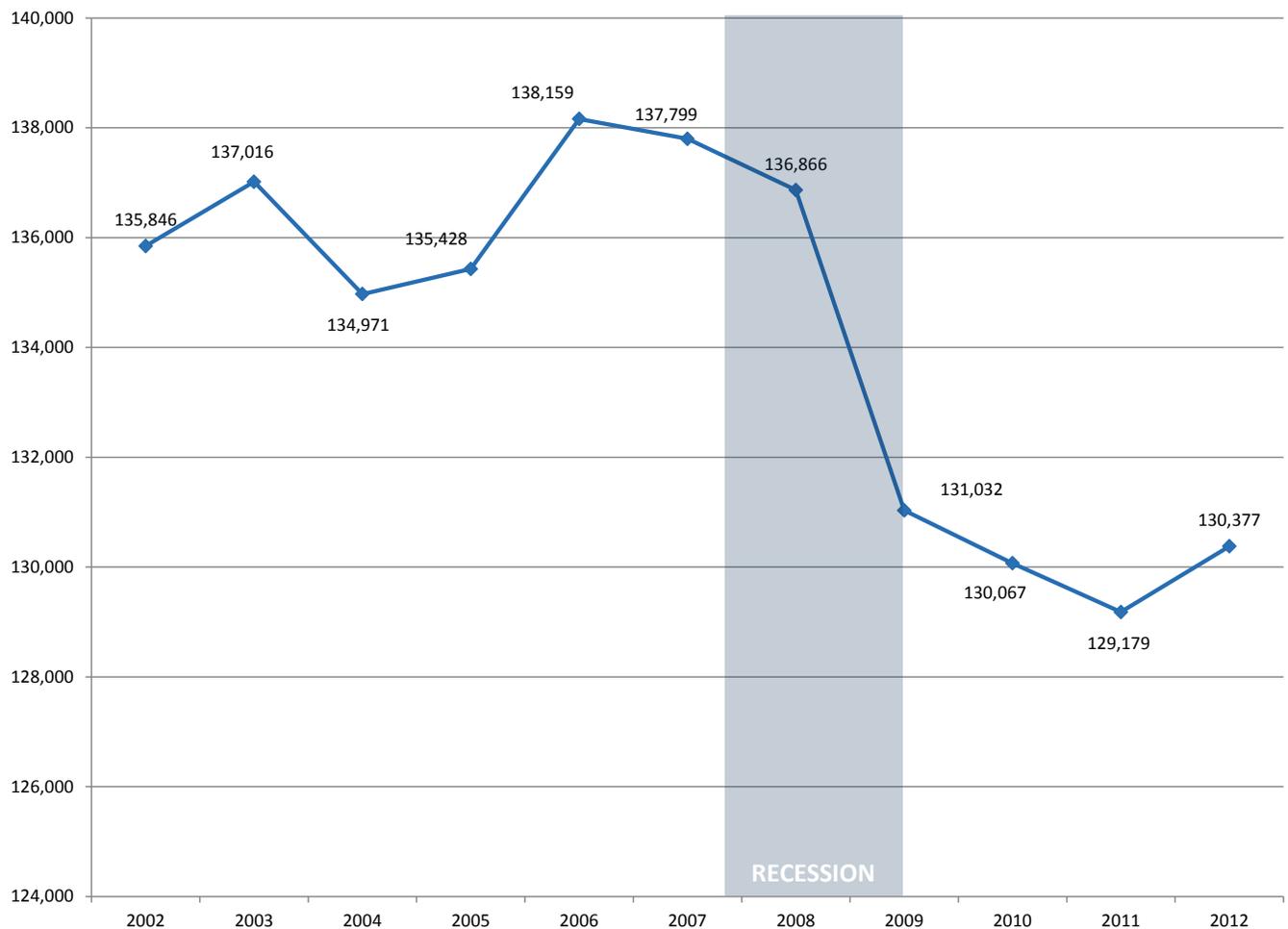
EMPLOYMENT AND UNEMPLOYMENT

A crucial indicator of the health of a workforce is its labor force levels. Labor force data count residents who are employed and unemployed. There are a few Federal definitions that will make discussion of the labor force a little easier to understand.

- **Employed:** Persons 16 years old or older who worked for pay any time during the week that includes the 12th of the month
- **Unemployed:** Persons 16 years old or older who are not working but want a job, and are able and willing to work
- **Labor Force:** Employed plus unemployed
- **Unemployment Rate:** Unemployment divided by labor force

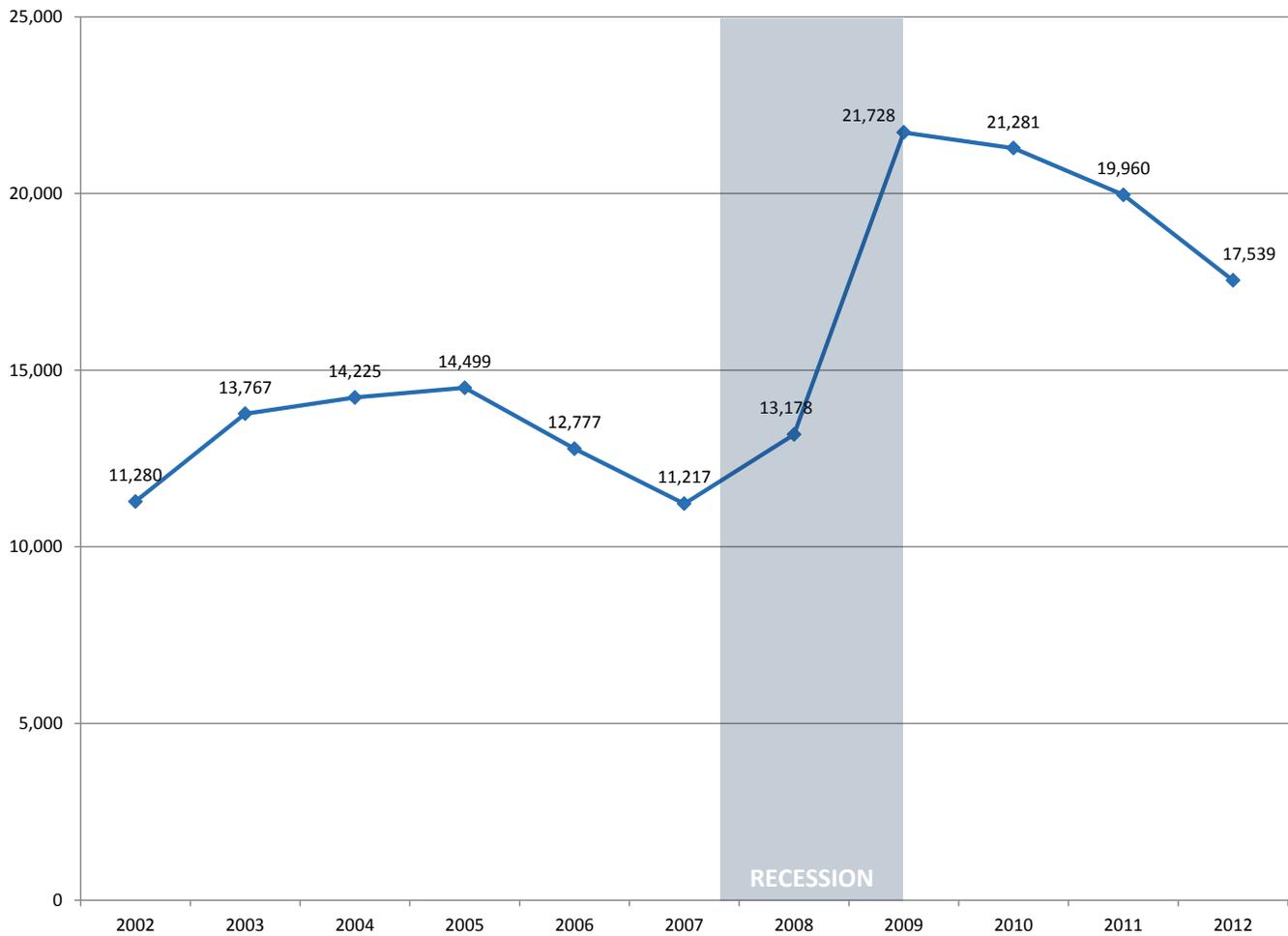
In Figure 6, the recession (officially from December 2007 through June 2009) had a great effect on the labor force. Employment dropped, and unemployment increased by 94 percent.

Figure 6: Employment - 2002-2012



Source: BLS, SCDEW, Local Area Unemployment Statistics (LAUS)

Figure 7: Unemployment - 2002-2012

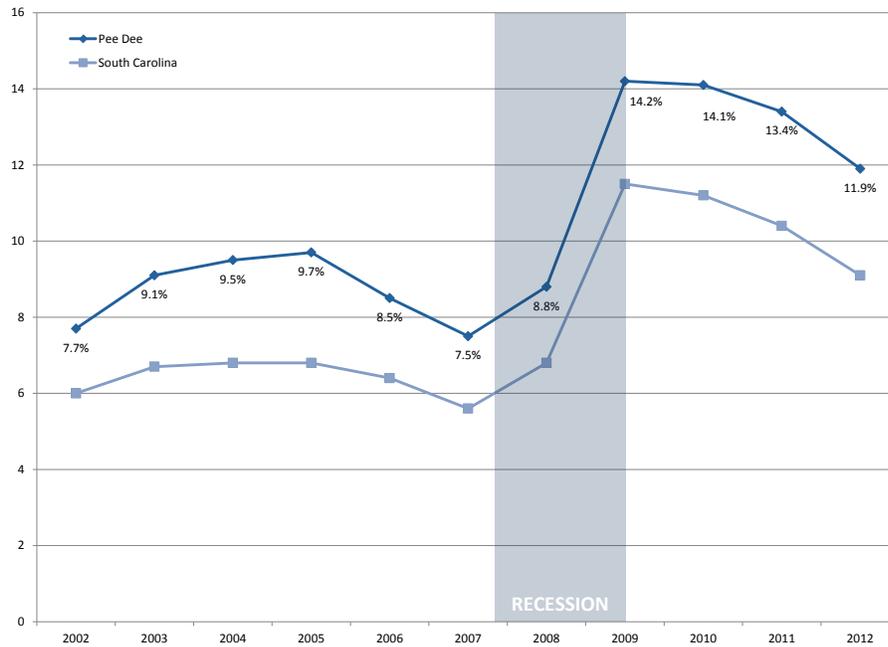


Source: BLS, SCDEW, LAUS

Tracking annual unemployment rates give a good snapshot of the state of an area’s workforce. Annual rates smooth out the usual ups and downs of a month-to-month rate (due to normal seasonal or cyclical changes) to give a more accurate picture.

Figure 8 shows the annual rates for the Pee Dee LWIA area and South Carolina. Pee Dee has historically been above the state’s rate, and this was the same during and after the recession. During the recession, the Pee Dee rate increased sharply from 7.5 percent in 2007 to 14.2 percent in 2009.

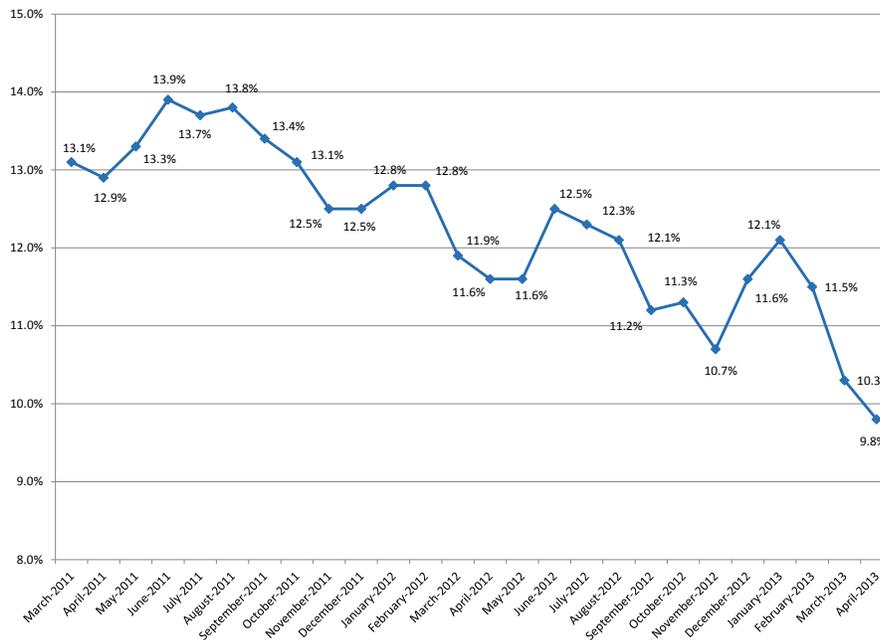
Figure 8: Annual Unemployment - 2002-2012



Source: BLS, SCDEW, LAUS

Figure 9 illustrates that the monthly unemployment rate has seen wide fluctuations since March 2011. The area seems to be steadily recovering from the recession.

Figure 9: Monthly Unemployment Rate - March 2011-April 2013



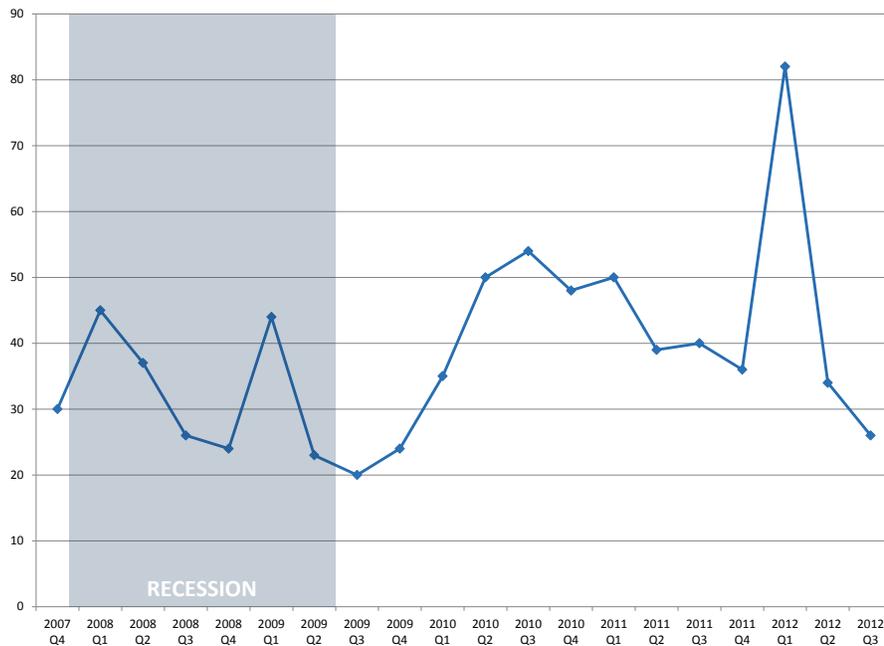
Source: BLS, SCDEW, LAUS

NEW STARTUP FIRMS

One way to see if an economy is improving is to examine data about startup firms. An increase in new companies might be an indicator of expansion in the area, whereas a drop in new firms shows a lack of confidence in the future. (Note: There is almost always a spike in startups in the first quar-

ter of the year.) Again, the recession had a major impact on normal business birth and death rates. Startups have been steady in the area with a large increase in early 2012.

Figure 10: New Startup Firms - 2007-2012



Source: BLS, SCDEW, QCEW

EMPLOYERS BY SIZE OF ESTABLISHMENT

By far, the largest category of business size in the area is small business. Small businesses (or establishments) are defined in South Carolina as companies employing 49 or fewer people. The Pee Dee LWIA and the state as a whole have 93 percent of establishments designated as small businesses.

Small businesses may need more support and assistance than larger companies because they may not have a designated human resources department or person. They may rely on other resources, such as SC Works Centers, for help with hiring, training, or screening job candidates.

Figure 11: Employers by Size of Establishment - 3rd Quarter 2012

Employees	Pee Dee	South Carolina
0 to 4	3,060	63,766
5 to 9	1,299	19,667
10 to 19	842	13,316
20 to 49	594	9,881
50 to 99	214	3,907
100 to 249	130	2,433
250 to 499	41	757
500 to 999	13	328
1000 +	7	264

Source: BLS, SCDEW, QCEW

SUPPLY: WHAT'S OUT THERE?

A manufacturing assembly line needs to have resources and supplies on-hand so that the line does not have to stop. The same is true for the workforce. The supply of workers needs to be of the right quantity and quality to do the job. Is the supply of workers in line with what the companies in the Pee Dee LWIA need? Seven streams of workforce supply provide an indication: population, commuting, education of the population, clusters of high school students, awards earned at higher education institutions, and characteristics of unemployment insurance claims and claimants.

POPULATION BY AGE

Age distribution in the area is similar to the state and the country for most segments of the population. In the 20-29 age cohorts, Pee Dee has a lower proportion of population than the state as a whole does, and in the 50-64 age cohorts, the area has a higher proportion of population than the state.

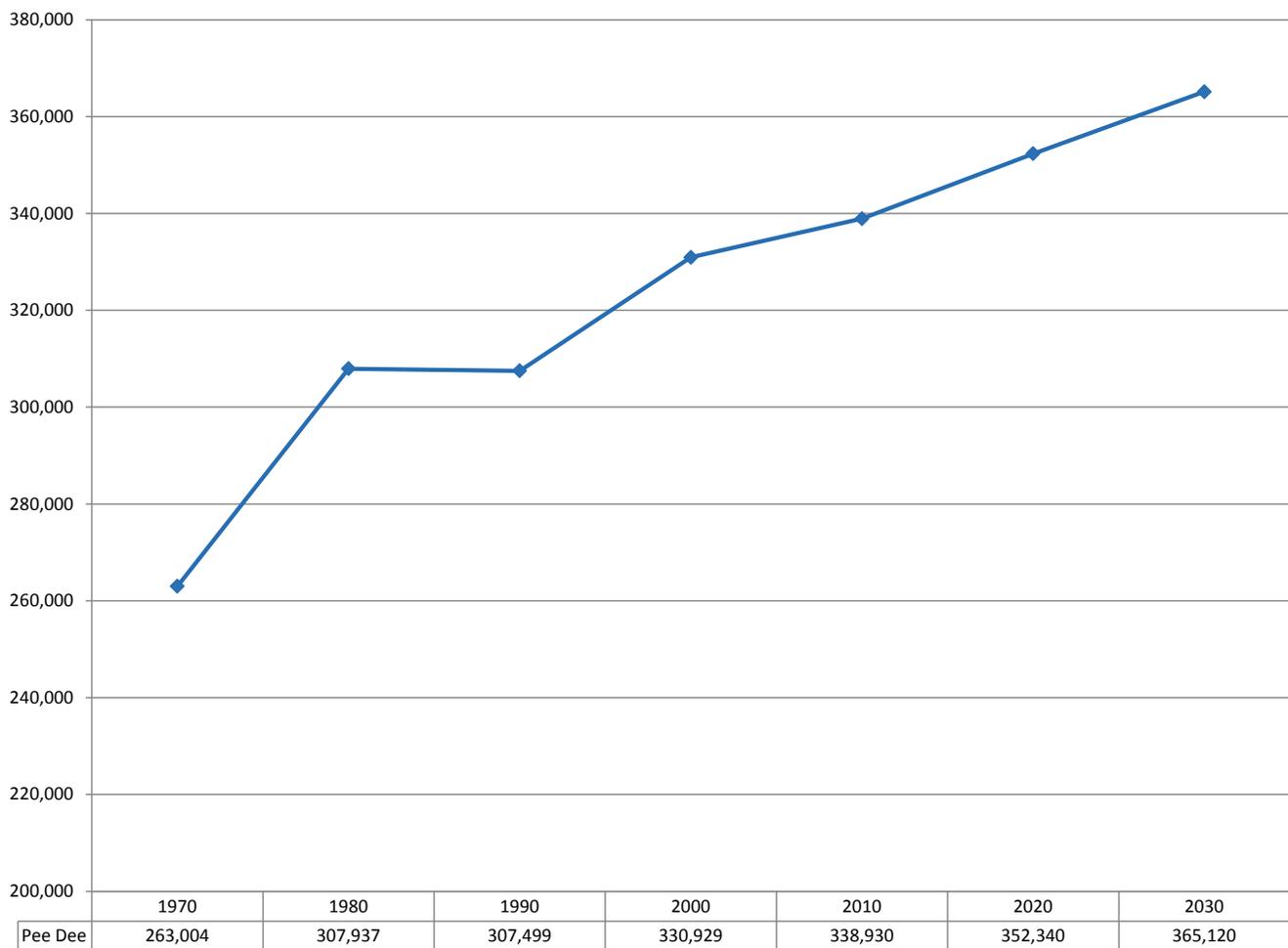
Figure 12: Population by Age

Age Range	Pee Dee	SC	US
0-4	6.6%	6.5%	6.6%
5-9	6.9%	6.4%	6.6%
10-14	6.8%	6.5%	6.7%
15-19	7.2%	7.2%	7.2%
20-24	6.3%	7.2%	7.0%
25-29	5.9%	6.6%	6.8%
30-34	6.2%	6.2%	6.4%
35-39	6.5%	6.5%	6.6%
40-44	6.7%	6.8%	7.0%
45-49	7.2%	7.2%	7.4%
50-54	7.4%	7.0%	7.2%
55-59	6.9%	6.5%	6.3%
60-64	6.1%	5.9%	5.3%
65-69	4.5%	4.5%	3.9%
70-74	3.3%	3.3%	3.0%
75-79	2.3%	2.5%	2.4%
80-84	1.8%	1.7%	1.9%
85 and older	1.5%	1.5%	1.7%

Source: US Bureau of Census, American Community Survey (ACS)

POPULATION CHANGE AND MIGRATION

Figure 13: Population Projections to 2030



Source: US Census Bureau, Census 2000, SC Department of Health and Environmental Control - Vital Records Department. Population projections calculated by SC Budget and Control Board, Office of Research and Statistics

After a small increase in population from 1990 to 2000 (up 7.6 percent), the growth of the population of this area slowed, growing just over 2 percent over the next 10 years. Growth is projected to continue to increase less than 1 percent per year to 2030.

Figure 14: Population Migration - 2011 - 5-Year Estimate

	Total	Moved From Different State	Moved From Abroad	Moved From Different County	Moved Within Same County
Population 1 year and over	340,577	2.2%	0.2%	2.6%	8.2%
Hispanic or Latino origin (of any race)	7,718	4.6%	1.0%	5.2%	10.1%
White alone, not Hispanic or Latino	178,951	2.3%	0.1%	2.5%	6.6%
Population 25 Years and Over					
Less than high school graduate	51,683	1.7%	0.2%	2.5%	7.5%
High school graduate/GED	85,389	1.7%	0.1%	2.2%	7.2%
Some college or associate's degree	56,119	2.2%	0.1%	2.2%	5.8%
Bachelor's degree	23,270	2.7%	0.2%	2.0%	4.7%
Graduate or professional degree	12,168	2.0%	0.7%	1.5%	3.7%

Source: US Census Bureau, ACS, SCDEW

In-migration (people moving into Pee Dee) shows that less than 3 percent of residents with a graduate degree and 2.9 percent of those with a bachelor’s degree came from out of state or out of the country. While Hispanics moved into Pee Dee LWIA from a different state at twice the rate of Whites, they moved into Pee Dee from abroad at 10 times the rate of Whites. As 13 percent of residents over the age of one moved, only 2.4 percent came from outside of South Carolina.

COMMUTING PATTERNS

The vast majority of the workers (81 percent) of the Pee Dee lives and works in the LWIA. The tables in Figure 15 show that nearly 12,000 workers commute in from other areas to work in the LWIA. Horry County draws a notable portion of Pee Dee LWIA’s residents out of the area to work. Over 4,000 more employees leave the area to work than commute into it.

Figure 15: Commuting Patterns - 2010

To Pee Dee WIA From	11,979	From Pee Dee WIA To	16,038
Williamsburg County, SC	1,709	Horry County, SC	2,638
Horry County, SC	1,612	Union County, NC	2,099
Lee County, SC	1,009	Williamsburg County, SC	1,746
Sumter County, SC	931	Scotland County, NC	1,011
		Richmond County, NC	654

Source: US Census Bureau, ACS

EDUCATIONAL ATTAINMENT

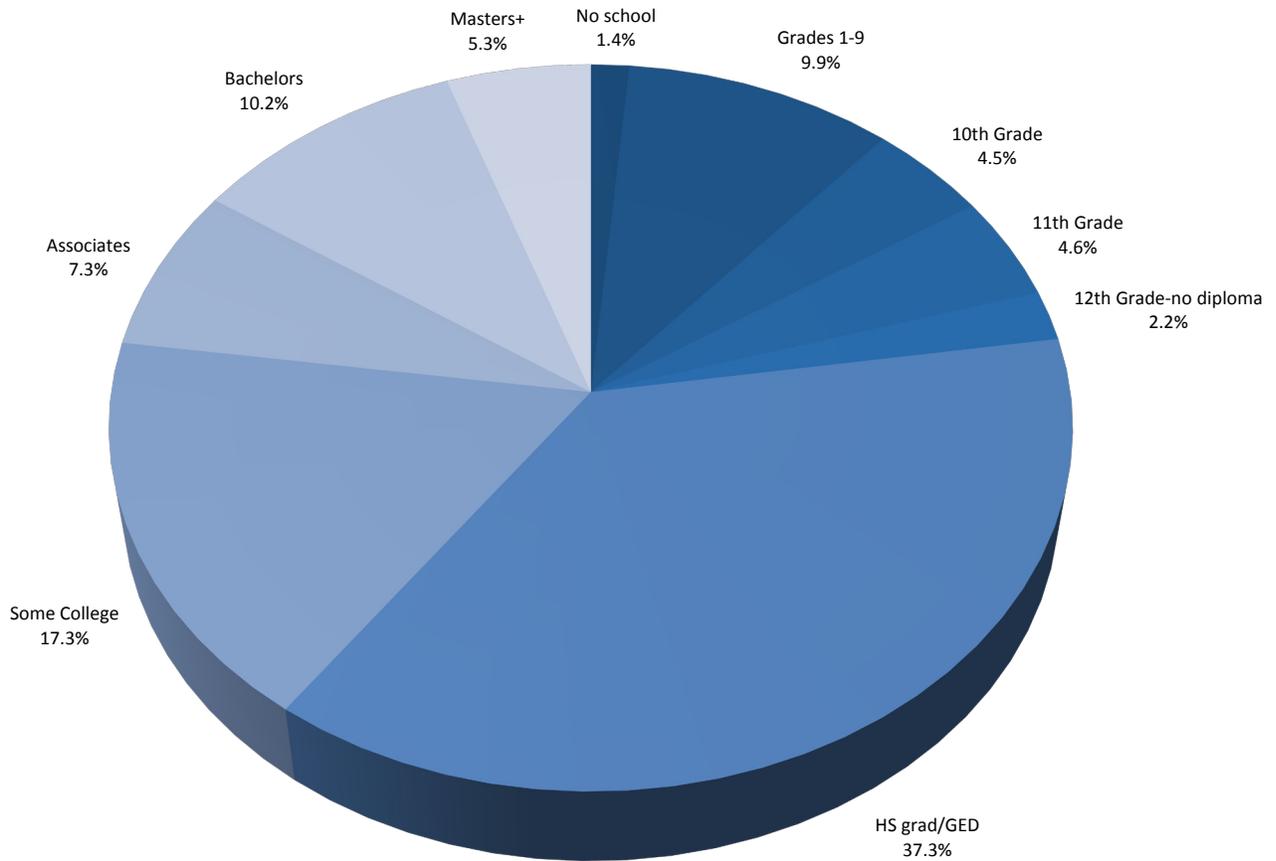
The Pee Dee LWIA has a higher concentration of residents with a high school diploma or GED or less when compared to the state as a whole but a lower concentration with more than a high school education than the state overall.

Figure 16: Educational Attainment - Pee Dee and South Carolina 2011

Education Level	Pee Dee	SC
No school	1.4	1.1
Grades 1-9	9.9	7.0
10th Grade	4.5	3.3
11th Grade	4.6	3.2
12th Grade-no diploma	2.2	1.8
HS grad/GED	37.3	30.9
Some College	17.3	20.1
Associates	7.3	8.4
Bachelors	10.2	15.6
Masters+	5.3	8.6

Source: US Census Bureau, ACS

Figure 17: Educational Attainment - Pee Dee 2011

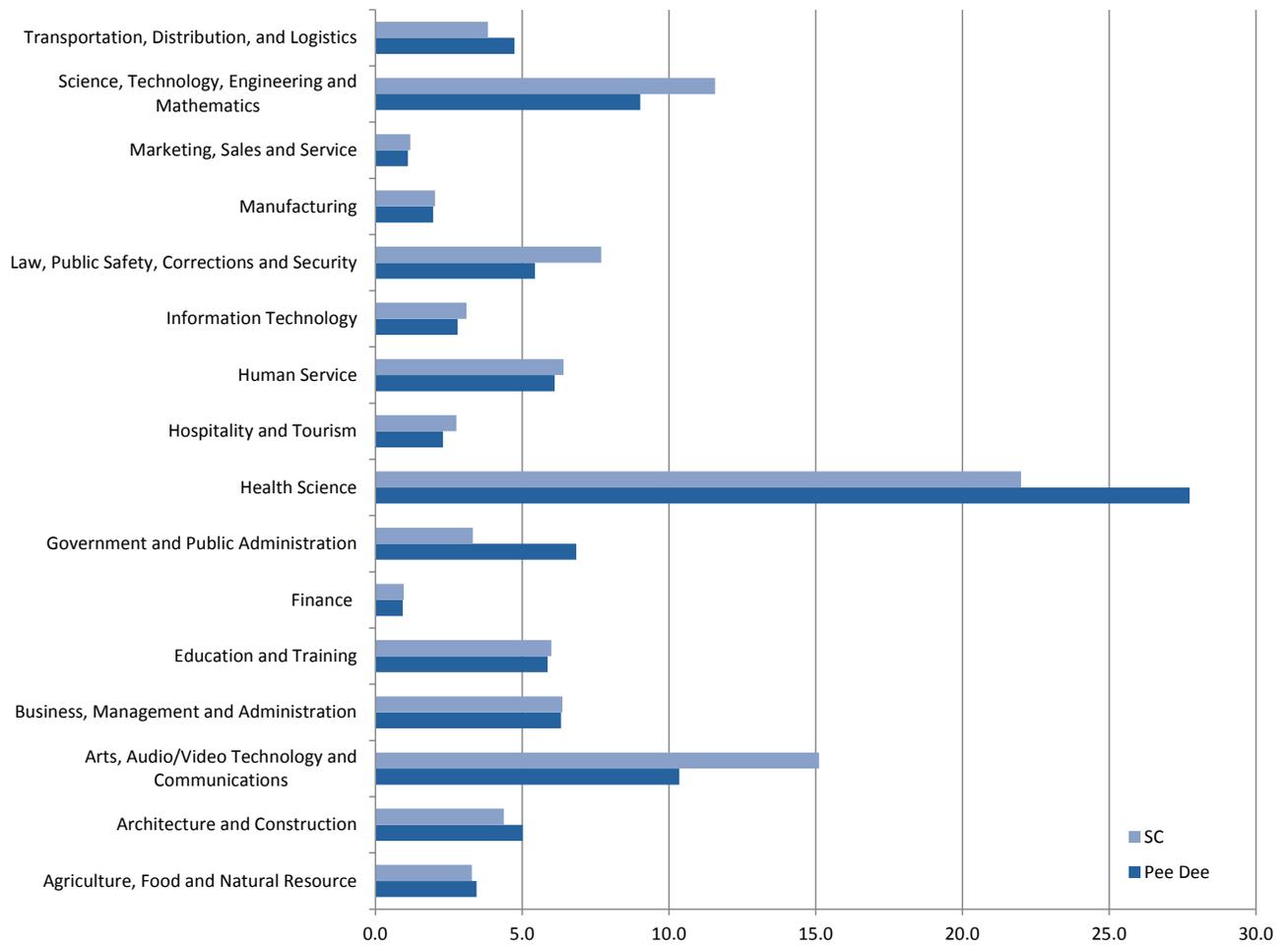


Source: US Census Bureau, ACS, SCDEW

CAREER CLUSTERS SELECTED BY HIGH SCHOOL STUDENTS

Eighth-grade students in South Carolina are required to choose a career cluster to lead them to a post-high school job or college major. There are 16 career clusters.

Figure 18: Percent of Students Declaring a Career Clusters In Pee Dee and SC - 2012



Note: Declared clusters for students declaring a specific cluster on their primary Electronic Individual Graduation Plan (e-IGP) for 2011-2012 year

Source: SC Department of Education

The Health Science career cluster is the top choice for students in the Pee Dee area likely in response to news of a shortage of healthcare workers in South Carolina. In keeping with the state trend, the area’s students also picked the Arts, Audio/Video Technology and Communications and Science, Technology, Engineering and Mathematics (STEM) clusters in notable numbers.

Figure 19: Career Clusters - 2012

Cluster	Pee Dee	SC
Agriculture, Food and Natural Resource	3.4	3.3
Architecture and Construction	5.0	4.4
Arts, Audio/Video Technology and Communications	10.4	15.1
Business, Management and Administration	6.3	6.4
Education and Training	5.9	6.0
Finance	0.9	1.0
Government and Public Administration	6.8	3.3
Health Science	27.7	22.0
Hospitality and Tourism	2.3	2.8
Human Service	6.1	6.4
Information Technology	2.8	3.1
Law, Public Safety, Corrections and Security	5.4	7.7
Manufacturing	2.0	2.0
Marketing, Sales and Service	1.1	1.2
Science, Technology, Engineering and Mathematics	9.0	11.6
Transportation, Distribution, and Logistics	4.7	3.8

Source: SC Department of Education

DEGREES AWARDED

In higher education, Pee Dee area colleges and universities have conferred a wide variety of awards. Of the top 20, Registered Nursing is the most popular followed by Business Administration and Management and Liberal Arts and Sciences. The institutions included in this data are Coker College, Florence-Darlington Technical College, Francis Marion University, and Northeastern Technical College.

Figure 20: Top 20 Majors in Pee Dee - 2011

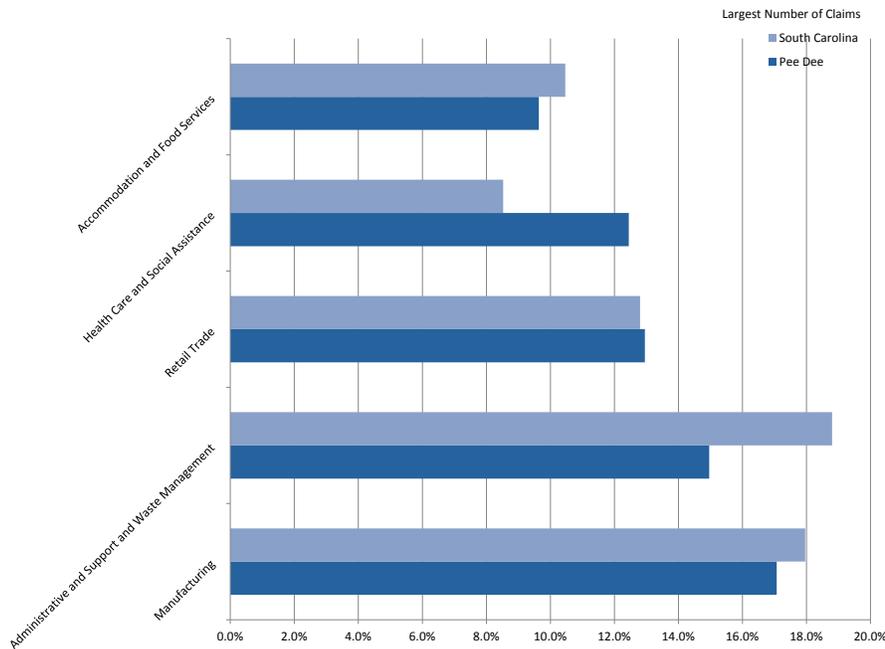
Majors	
Registered Nursing/Registered Nurse	128
Business Administration and Management, General	103
Liberal Arts and Sciences/Liberal Studies	103
Biology/Biological Sciences, General	87
Nursing - Registered Nurse Training, BSN Generic	78
Psychology, General	73
Business/Commerce, General	72
Social Work	66
Welding Technology/Welder	61
Accounting	56
Sociology	53
Elementary Education and Teaching	41
Licensed Practical/Vocational Nurse Training	41
Sales, Distribution, and Marketing Operations	39
Machine Tool Technology/Machinist	38
Criminal Justice/Safety Studies	37
Legal Assistant/Paralegal	33
Special Education and Teaching, Other	33
Electrical, Electronic and Communications Engineer	30
Administrative Assistant and Secretarial Science	29

Source: SC Commission on Higher Education, http://www.che.sc.gov/New_Web/Data&Pubs.htm

CHARACTERISTICS OF UI CLAIMS BY OCCUPATION

Another source of supply for the workforce is people who are receiving unemployment compensation. In the Pee Dee LWIA area, the highest number of claims is filed in the Manufacturing sector followed by Administrative and Support and Waste Management industry and the Retail Trade group. The Administrative and Support and Waste Management group includes office administrative services; facilities support services; employment services; services to buildings and dwellings; and waste collection, treatment, and disposal services. These sectors highlight the diverse industries in the economy of the Pee Dee LWIA and their support.

Figure 21: Characteristics of UI Claims by Occupation - April 2013



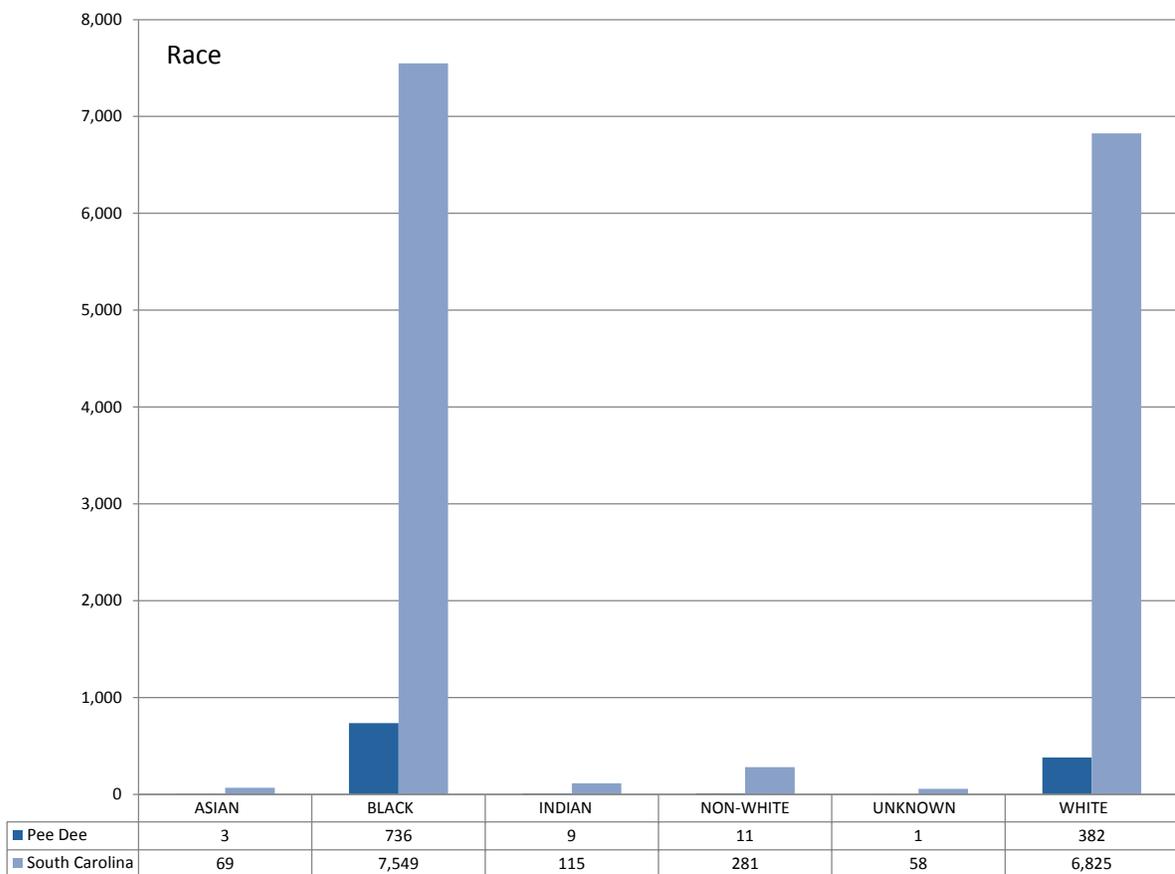
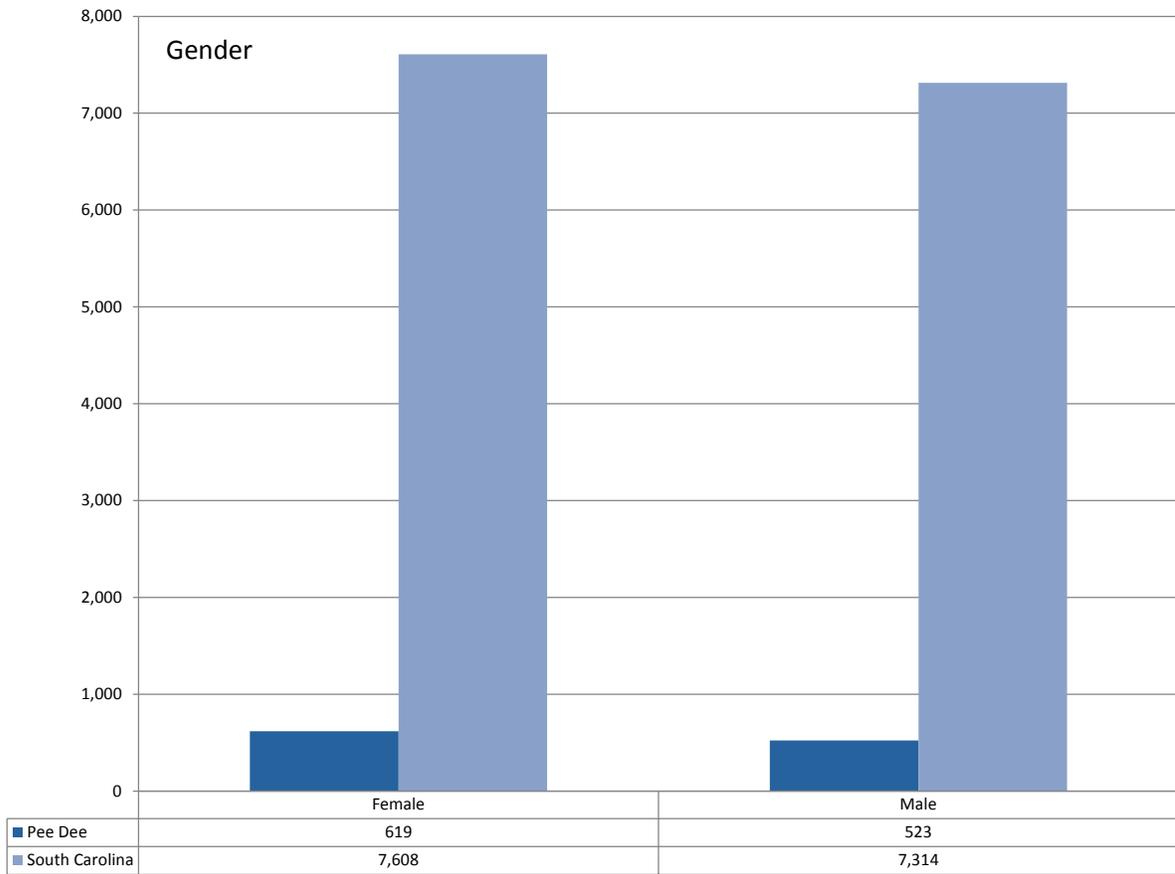
Occupation	Pee Dee	South Carolina
Manufacturing	170	2,267
Administrative and Support and Waste Management	149	2,373
Retail Trade	129	1,616
Health Care and Social Assistance	124	1,076
Accommodation and Food Services	96	1,321
Wholesale Trade	60	445
Construction	59	820
Transportation and Warehousing	53	414
Professional, Scientific, and Technical Services	29	698
Finance and Insurance	27	300
Other Services (except Public Administration)	27	292
Public Administration	15	206
Management of Companies and Enterprises	12	35
Agriculture, Forestry, Fishing and Hunting	11	98
Educational Services	11	222
Arts, Entertainment, and Recreation	9	94
Real Estate and Rental and Leasing	7	213
Information	6	122
Mining, Quarrying, and Oil and Gas Extraction	2	10

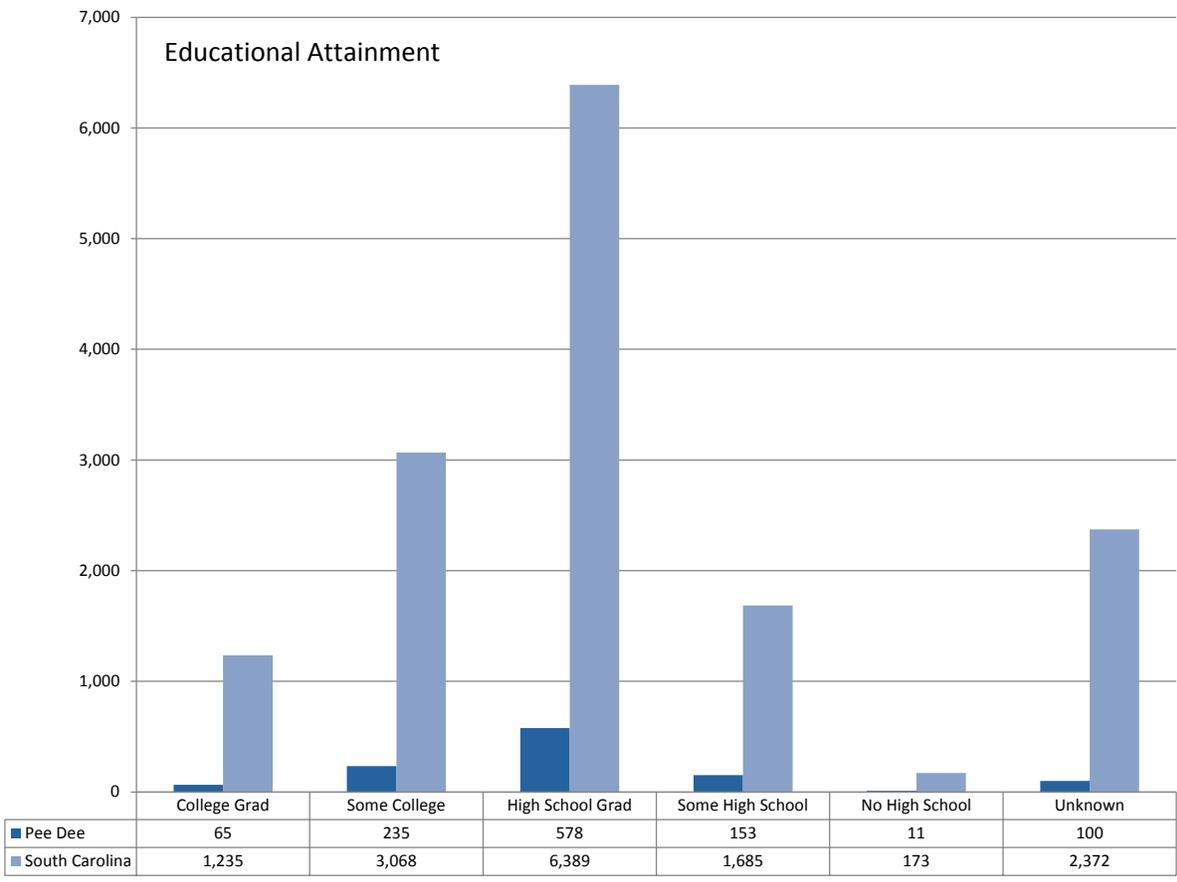
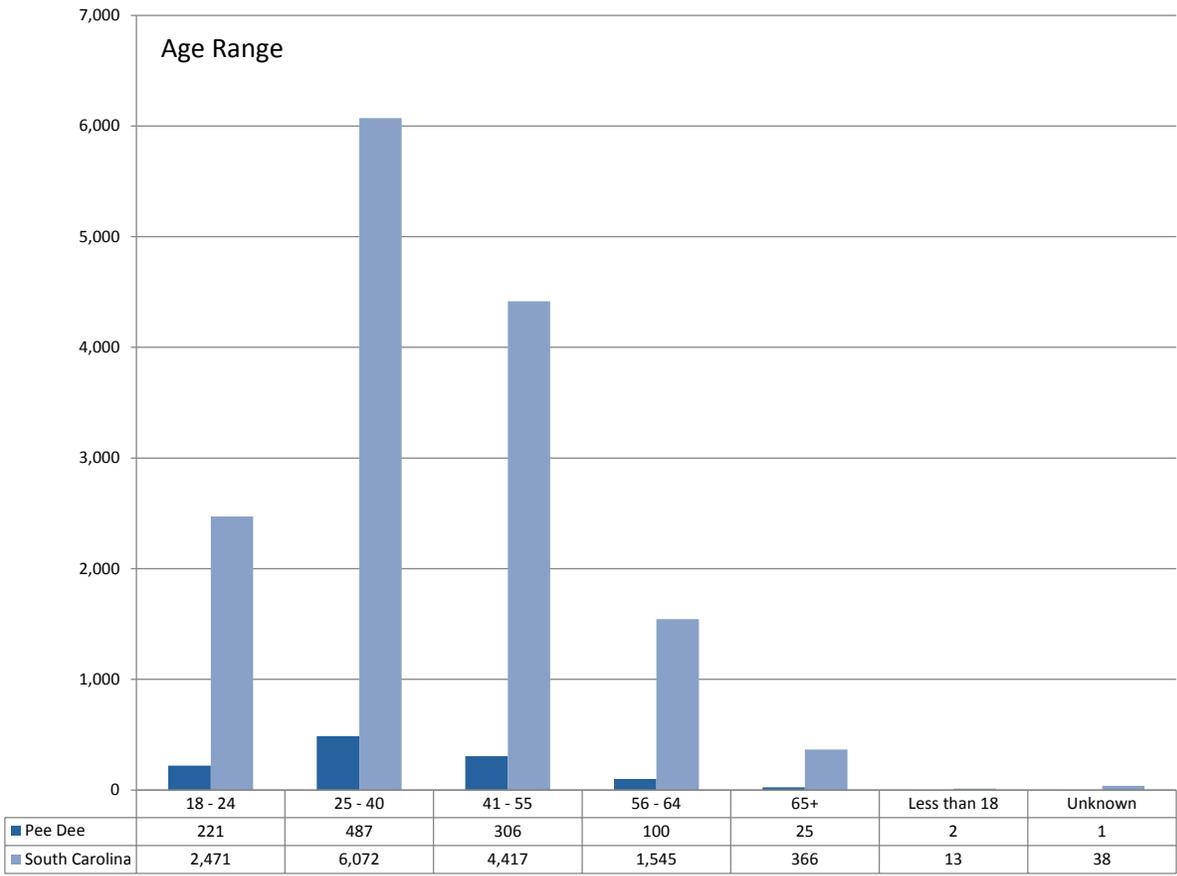
Source: SCDEW

UNEMPLOYMENT INSURANCE CLAIMANT CHARACTERISTICS

The people in this area who were receiving unemployment insurance benefits in April 2013 were typically female, black, 25-40 years old, and were high school graduates or earned a GED.

Figure 22: UI Claimant Characteristics - April 2013





Source: SCDEW

DEMAND: WHAT DO WE NEED?

Workforce demand shows what is needed in an area to support current and future employers. This section examines current (real-time) demand through online job advertisements, industry and occupational projections to 2018, educational requirements for future jobs, and the skills needed for those occupations.

Online job advertisements give a snapshot of what positions need to be filled in an area. The data is from the Conference Board Help Wanted OnLine® Data Series (HWOL) which measures the number of new and reposted job ads from over 16,000 Internet job boards. In April 2013, the largest occupational group with job ads in the Pee Dee LWIA was Healthcare Practitioners and Technical Occupations followed by Sales and Related Occupations.

ONLINE JOB ADVERTISEMENTS

Figure 23: Pee Dee HWOL - April 2013 by Major Group

Occupation	# of Job Ads
Healthcare Practitioners and Technical Occupations	697
Sales and Related Occupations	370
Transportation and Material Moving Occupations	293
Management Occupations	228
Miscellaneous	203
Healthcare Support Occupations	197
Office and Administrative Support Occupations	194
Food Preparation and Serving Related Occupations	170
Architecture and Engineering Occupations	159
Installation, Maintenance, and Repair Occupations	132
Business and Financial Operations Occupations	117
Computer and Mathematical Occupations	102
Construction and Extraction Occupations	90
Production Occupations	88
Protective Service Occupations	83
Education, Training, and Library Occupations	71
Arts, Design, Entertainment, Sports, and Media Occupations	61
Building and Grounds Cleaning and Maintenance Occupations	43
Community and Social Services Occupations	32
Personal Care and Service Occupations	30
Legal Occupations	9
Life, Physical, and Social Science Occupations	8
Military Specific Occupations	1
Farming, Fishing, and Forestry Occupations	1

Note: A job advertisement may include multiple openings.

Source: The Conference Board Help Wanted OnLine® Data Series (HWOL)

INDUSTRY PROJECTIONS

The Health Care and Social Assistance industry is projected to have the largest increase in employment from 2008 to 2018, growing by 4,160 jobs or 416 jobs/year. This sector includes services such as ambulatory health care services, hospitals, nursing and residential care facilities, and so-

cial assistance services. The Educational Services category reports the next largest growth with a projected 89 openings/year followed by Administrative and Support and Waste Management with 71 jobs/year.

Figure 24: Industry Projections - 2008-2018

Industry	Estimate Employment (2008)	Projected Employment (2018)	Change	Percent Change	Annual Percent Change
Total Employment, All Jobs	134,254	140,226	5,972	4.45	0.44
Health Care and Social Assistance	18,891	23,051	4,160	22.02	2.01
Educational Services	10,946	11,839	893	8.16	0.79
Administrative and Support and Waste Management and Remediation	3,976	4,687	711	17.88	1.66
Accommodation and Food Services	9,472	10,114	642	6.78	0.66
Professional, Scientific, and Technical Services	2,482	3,054	572	23.05	2.10
Government	10,448	10,988	540	5.17	0.51
Wholesale Trade	4,597	5,083	486	10.57	1.01
Transportation and Warehousing	4,108	4,581	473	11.51	1.10
Management of Companies and Enterprises	875	1,299	424	48.46	4.03
Finance and Insurance	4,294	4,699	405	9.43	0.91
Retail Trade	15,758	16,094	336	2.13	0.21
Real Estate and Rental and Leasing	891	1,039	148	16.61	1.55
Arts, Entertainment, and Recreation	1,035	1,162	127	12.27	1.16
Other Services (Except Government)	4,911	4,943	32	0.65	0.07
Mining	201	210	9	4.48	0.44
Information	1,301	1,305	4	0.31	0.03
Utilities	862	834	-28	-3.25	-0.33
Construction	4,547	4,380	-167	-3.67	-0.37
Agriculture, Forestry, Fishing and Hunting	3,433	2,099	-1,334	-38.86	-4.80
Manufacturing	23,573	21,116	-2,457	-10.42	-1.09

Source: BLS, SCDEW, QCEW, WI

OCCUPATIONAL PROJECTIONS

Many of the occupations that are projected to have numerous openings between 2008 and 2018 in this area support a growing economy. Healthcare occupations lead the projected employment listing with the top four positions, as shown in Figure 25.

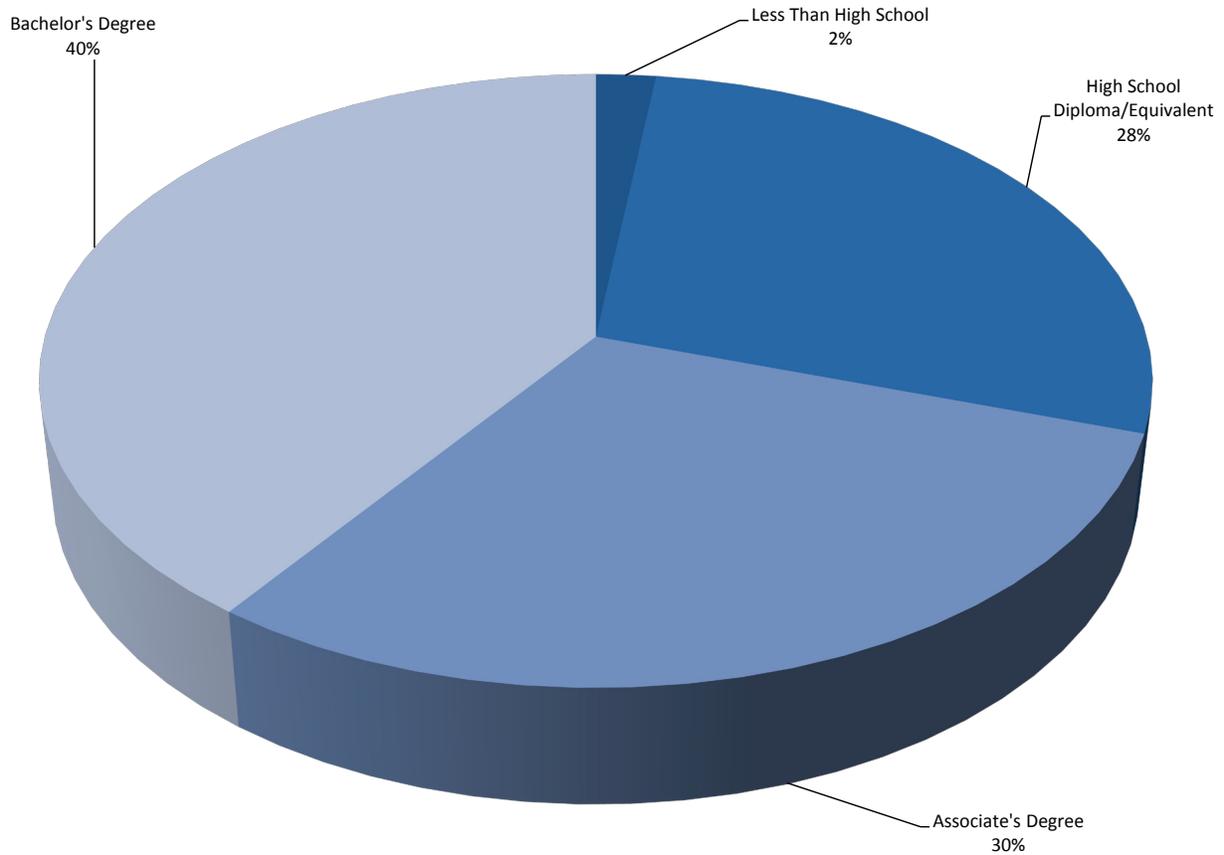
Figure 25: Growing Occupations - 2008-2018

Occupation	Estimated Employment (2008)	Projected Employment (2018)
Nursing Aides, Orderlies, and Attendants	2,364	2,914
Personal and Home Care Aides	505	852
Pharmacy Technicians	505	700
Pharmacists	360	445
Insurance Sales Agents	332	419
First-Line Super./Manag., Personal Service Workers	297	365
Surgical Technologists	288	350
Paralegals and Legal Assistants	197	244
Dental Assistants	177	215
Instructional Coordinators	165	201
Fitness Trainers and Aerobics Instructors	158	194
Compliance Officers, Except Agriculture, Construction	119	148
Respiratory Therapists	114	138
Personal Financial Advisors	79	116
Medical Equipment Repairers	21	33
Biological Technicians	27	33
Veterinarians	24	29
Mental Health Counselors	18	23
Recreational Therapists	13	16
Transportation Inspectors	10	15

Source: BLS, SCDEW, OES, WI

Of the top 50 projected growing occupations by percent change, 14 require a high school diploma or GED, one requires less than a high school diploma or GED, 20 require a bachelor's degree or higher, and 15 need an associate's degree or require some kind of postsecondary training. The one occupation requiring less than a high school diploma or GED does require short-term on-the-job training (OJT), which is defined by the US Department of Labor as less than one month.

Figure 26: Education for Top 50 Projected Occupations



Source: BLS, SCDEW, OES, WI

It is just as important to know which occupations are declining in the area. Declines are often due to technological advances (i.e. computers or robots replacing humans), so many of the declining occupations are projected to be manual labor jobs, as shown in Figure 27.

Figure 27: Top 20 Projected Declining Occupations in Pee Dee - 2008-2018

Occupation
Agricultural Equipment Operators
Chief Executives
Computer Operators
Computer, Automated Teller & Office Mach. Repairers
Cutting, Punching, and Press Machine Setters
Electricians
Farmworkers & Laborers, Crop, Nursery & Greenhouse
File Clerks
Grinding, Lapping, Polishing, and Buffing Machine Operators
Helpers--Installation, Maint., & Repair Workers
Industrial Engineering Technicians
Inspectors, Testers, Sorters, Samplers & Weighers
Maintenance Workers, Machinery
Multiple Machine Tool Setters, Operators, and Tenders
Order Clerks
Pipelayers
Postal Service Mail Sorters, Processors
Pressers, Textile, Garment, and Related Materials
Roofers
Sewing Machine Operators

Source: BLS, SCDEW, OES, WI

SKILLS OF PROJECTED OCCUPATIONS

Using the top 50 projected growing occupations, the skill levels needed for the future workforce based on the definitions given earlier in this report can be categorized.

Figure 28: Skill Levels

Low	6
Middle	24
High	20

Source: BLS, SCDEW, OES, WI

Low-skilled jobs often have commensurate (i.e. low) pay and do not require much education, experience, or OJT. Does the supply of workers have the right skills for the jobs in the future?

WORKFORCE CHALLENGES

The current economic situation in the Pee Dee LWIA, the supply of workers, and the characteristics of workers who will be in demand has been reviewed. What can be gleaned from these findings? Are there gaps between supply and demand?

Supply Findings

The population is projected to grow very slowly to 2030, and with a smaller-than-the-state share of 20-29 year olds in their prime working age, this area looks to have a challenge in having a proper mix of workers. In addition, in-migration from other states/countries adds few residents at the top end of the educational spectrum. The LWIA has a lower percent of residents aged 25 and older with more than a high school diploma or GED than the state does as a whole.

Many high school students selected the Health Science career cluster in keeping with state trends. The next most popular career cluster was Arts, Audio/Video/Technology, and Communications followed by STEM.

Demand Findings

Employer demand was consistent between online advertisements (current) and 2018 projected occupations (long-term needs) in general. Both had the need for workers in Marketing, Sales, and Service; Health Science; and Business, Management, and Administration. Transportation, Distribution, and Logistics was a short-term need, while Hospitality and Tourism was a long-term need. All but one of the top projected occupations require at least a high school diploma or GED.

Figure 29: Comparison of Supply and Demand

	Demand		Supply	
	Top online ads	Projected Occupations	Degrees Earned	Career Clusters Selected
Agriculture, Food and Natural Resource	1.2	3.5	0.1	3.4
Architecture and Construction	4.1	3.9	6.6	5.0
Arts, Audio/Video Technology and Communications	1.8	0.8	2.4	10.4
Business, Management and Administration	14.6	15.8	14.5	6.3
Education and Training	1.4	7.3	10.2	5.9
Finance	4.9	2.7	1.2	0.9
Government and Public Administration	0.2	0.2	1.4	6.8
Health Science	22.3	14.4	20.6	27.7
Hospitality and Tourism	3.8	9.2	0.0	2.3
Human Service	3.2	6.9	19.6	6.1
Information Technology	3.9	1.1	2.3	2.8
Law, Public Safety, Corrections and Security	1.2	3.0	4.6	5.4
Manufacturing	3.1	8.2	2.0	2.0
Marketing, Sales and Service	17.0	15.5	3.0	1.1
Science, Technology, Engineering and Mathematics	6.0	1.1	9.4	9.0
Transportation, Distribution, and Logistics	11.3	6.3	2.3	4.7

Source: BLS, SCDEW, WI, SC Department of Education, OES, HWOL

A few observations about the comparison that could be considered challenges to the workforce pipeline include:

- There is an overabundance of graduates in Education and Training and Human Service that is outpacing the short-term demand.
- There is more short-term employment demand than graduates in Transportation, Distribution, and Logistics and Marketing, Sales and Service.
- The area is projected to produce a higher percent of students in Arts, Audio/Video Technology and Communications; Government and Public Administration; Health Science; and Science, Technology, Engineering and Mathematics than there will be Pee Dee jobs long-term.
- There is projected to be a higher employment demand long-term in the Business, Management, and Administration; Hospitality and Tourism; Manufacturing; and Marketing, Sales and Service clusters than there will be area graduates to meet it.

There is always a demand for employees with soft skills. It is said that hard skills (training, degrees, or certification) get you hired, but soft skills get you fired. Many of our residents need to learn or get a refresher in soft skills in order to KEEP their jobs. Employers see the need.

Top 10 Soft Skills Found in Online Ads for South Carolina (April 2013)

1. Oral and written communication skills
2. Customer Service Oriented
3. Problem solving
4. Detail oriented
5. Microsoft Office
6. Self-starting / Self-motivated
7. Organizational skills
8. Troubleshooting
9. Work independently
10. Sales experience

Source: *The Conference Board Help Wanted OnLine*® Data Series (HWOL)

CONCLUSION

The Pee Dee LWIA area overall encompasses an economy dependent on health care, manufacturing, and retail trade. The population is slowly increasing, and the education level for the population is lower than the state as a whole at the high end with lower percentages of residents with more than a high school diploma or GED. The workforce (current and potential) does face challenges in having the proper mix of employer demand being met by trained applicants. The majority of employers are advertising for jobs in health care; business, management, and administration; or marketing and sales. However, some supply flows could be fine-tuned to be more in line with demand.

The data shows that:

- There is an undersupply of today's students choosing the fields of Business, Management and Administration; Hospitality and Tourism; Manufacturing; and Marketing, Sales and Service to meet Pee Dee LWIA's future demand.
- There is an oversupply of today's students choosing the areas of Arts, Audio/Video Technology and Communication; Government and Public Administration; Science, Technology, Engineering and Mathematics; and Health Science that far outpace the area's long-term demand.
- Comprehensive soft skills training is needed for all students and job seekers (high school, post-secondary, adult, new and returning entrants to the labor force, and incumbent workers) so that they can not only get hired but retain their positions and thus reduce employee turnover.

Getting education in line with the demands of employers will help the Pee Dee LWIA meet the challenges it faces.

SANTEE-LYNCHES LWIA WORKFORCE REPORT 2012



The *Santee-Lynches Workforce Report* is published by the Labor Market Information (LMI) Department of the South Carolina Department of Employment and Workforce. The information and analyses provided in this publication are based on data collected from sources throughout South Carolina and the United States.

About SC DEW and LMI:

The Labor Market Information Department compiles and publishes employment statistics, job forecasts, wage data, demographics, and other labor market information to help public and private organizations, researchers, and others better understand today's complex workforce.

The LMI Department produced this report under the leadership of:

Executive Director - Cheryl Stanton
Interim Deputy Assistant Executive Director - Kerry Paul
Labor Market Information Director - Brenda Lisbon

South Carolina Department of Employment and Workforce
1550 Gadsden Street
Columbia, South Carolina 29201
(803) 737-2660
www.dew.sc.gov
www.scworkforceinfo.com



TABLE OF CONTENTS

EXECUTIVE SUMMARY	VI
INTRODUCTION	VII
ECONOMIC DISCUSSION: A CURRENT PICTURE OF THE WORKFORCE	1
EMPLOYMENT BY INDUSTRY	1
LOCATION QUOTIENT	1
AVERAGE ANNUAL WAGE BY INDUSTRY	2
OCCUPATIONAL EMPLOYMENT	3
SKILLS DATA	4
EMPLOYMENT AND UNEMPLOYMENT	6
NEW STARTUP FIRMS	8
EMPLOYERS BY SIZE OF ESTABLISHMENT	9
SUPPLY: WHAT'S OUT THERE?	10
POPULATION BY AGE	10
POPULATION CHANGE AND MIGRATION	11
COMMUTING PATTERNS	12
EDUCATIONAL ATTAINMENT	12
CAREER CLUSTERS SELECTED BY HIGH SCHOOL STUDENTS	13
DEGREES AWARDED	15
CHARACTERISTICS OF UI CLAIMS BY OCCUPATION	16
UNEMPLOYMENT INSURANCE CLAIMANT CHARACTERISTICS	17
DEMAND: WHAT DO WE NEED?	20
ONLINE JOB ADVERTISEMENTS	20
INDUSTRY PROJECTIONS	21
OCCUPATIONAL PROJECTIONS	21
SKILLS OF PROJECTED OCCUPATIONS	24
WORKFORCE CHALLENGES	25
CONCLUSION	27

TABLE OF FIGURES

FIGURE 1: SANTEE-LYNCHES LWIA EMPLOYMENT BY INDUSTRY - 3RD QUARTER 2012.....	1
FIGURE 2: NOTABLE SANTEE-LYNCHES LWIA LOCATION QUOTIENTS - 2011	2
FIGURE 3: ANNUAL AVERAGE WAGE BY INDUSTRY - 3RD QUARTER 2012.....	3
FIGURE 4: TOP 20 OCCUPATIONS WITH WAGES - 2012.....	4
FIGURE 5: TOP OCCUPATIONS BY SKILL CLASSIFICATION - SANTEE-LYNCHES 2012.....	5
FIGURE 6: EMPLOYMENT - 2002-2012.....	6
FIGURE 7: UNEMPLOYMENT - 2002-2012.....	7
FIGURE 8: ANNUAL UNEMPLOYMENT - 2002-2012	8
FIGURE 9: MONTHLY UNEMPLOYMENT RATE - MARCH 2011-APRIL 2013.....	8
FIGURE 10: NEW STARTUP FIRMS - 2007-2012.....	9
FIGURE 11: EMPLOYERS BY SIZE OF ESTABLISHMENT - 3RD QUARTER 2012.....	9
FIGURE 12: POPULATION BY AGE	10
FIGURE 13: POPULATION PROJECTIONS TO 2030.....	11
FIGURE 14: POPULATION MIGRATION - 2011 - 5-YEAR ESTIMATE.....	11
FIGURE 15: COMMUTING PATTERNS - 2010.....	12
FIGURE 16: EDUCATIONAL ATTAINMENT - SANTEE-LYNCHES AND SOUTH CAROLINA 2011.....	12
FIGURE 17: EDUCATIONAL ATTAINMENT - SANTEE-LYNCHES 2011	13
FIGURE 18: PERCENT OF STUDENTS DECLARING A CAREER CLUSTERS IN SANTEE-LYNCHES AND SC - 2012	14
FIGURE 19: CAREER CLUSTERS - 2012.....	15
FIGURE 20: TOP 20 MAJORS IN SANTEE-LYNCHES - 2011	16
FIGURE 21: CHARACTERISTICS OF UI CLAIMS BY OCCUPATION - APRIL 2013.....	17
FIGURE 22: UI CLAIMANT CHARACTERISTICS - APRIL 2013.....	18
FIGURE 23: SANTEE-LYNCHES HWOL - APRIL 2013 BY MAJOR GROUP.....	20
FIGURE 24: INDUSTRY PROJECTIONS - 2008-2018	21
FIGURE 25: GROWING OCCUPATIONS - 2008-2018.....	22
FIGURE 26: EDUCATION FOR TOP 50 PROJECTED OCCUPATIONS	23
FIGURE 27: TOP 20 PROJECTED DECLINING OCCUPATIONS IN SANTEE-LYNCHES - 2008-2018.....	24
FIGURE 28: SKILL LEVELS.....	24
FIGURE 29: COMPARISON OF SUPPLY AND DEMAND.....	25

EXECUTIVE SUMMARY

The employment leaders for Santee-Lynches Local Workforce Investment Area (LWIA) are Health Care and Social Assistance and Manufacturing. Employment growth is anticipated by 2018 in several industries, especially Health Care and Social Assistance and Transportation and Warehousing. The highest wages are paid by the Management of Companies and Enterprises and Mining, Quarrying, and Oil and Gas Extraction industries.

The Santee-Lynches LWIA's population has grown by under 1 percent per year since 2000 and has fewer residents aged 20 to 39 than the state's average.

Employment is rising, and unemployment is declining. Santee-Lynches LWIA has a historically higher unemployment rate than the state, and it remained so during and after the recession. Employment is concentrated in the Sumter area, and over 12,000 more people leave the Santee-Lynches area for work than enter it every day. Manufacturing and Administrative and Support and Waste Management are the largest two industries represented in unemployment claims. The latter sector includes office administrative services; facilities support services; employment services; services to buildings and dwellings; and waste collection, treatment, and disposal services.

Santee-Lynches has a lower proportion of residents with an associate's degree or higher than the state does as a whole. For projected growing jobs, 12 percent require no diploma, 32 percent require a diploma or GED, 20 percent require an associate's degree or training, and 36 percent require a bachelor's degree or higher.

Santee-Lynches LWIA businesses desire a trained workforce with the current focus being on business, marketing, and healthcare. Technology has become part of most occupations, requiring continuous training and skill-upgrading. A challenge for the Santee-Lynches LWIA is to match the skill levels of the workforce with open positions. There may be a mismatch between the employer's skill demands and the occupations that the worker will accept.

Santee-Lynches LWIA does have several factors working in its favor. The population is growing, and several educational institutions are available to strengthen the workforce. The Manufacturing sector is an expanding employment force and has a high job multiplier. Workers are becoming smarter and are gaining skills; the area is transitioning from low-to-middle-skilled jobs. Continental Tire is expanding.

The patterns and trends described in this report offer cause for both optimism and concern. Santee-Lynches LWIA has an exciting future ahead of it and can lead the way in delivering the skilled talent and economic opportunities that businesses and workers in the area deserve.

INTRODUCTION

The Santee-Lynches Local Workforce Investment Area is composed of Clarendon, Kershaw, Lee, and Sumter counties and is located near the middle of the state. The Santee-Lynches LWIA is home to the Wateree, Santee, and Lynches rivers. The Revolutionary War Battle of Camden took place here, and the “Swamp Fox” General Francis Marion was active in the area.

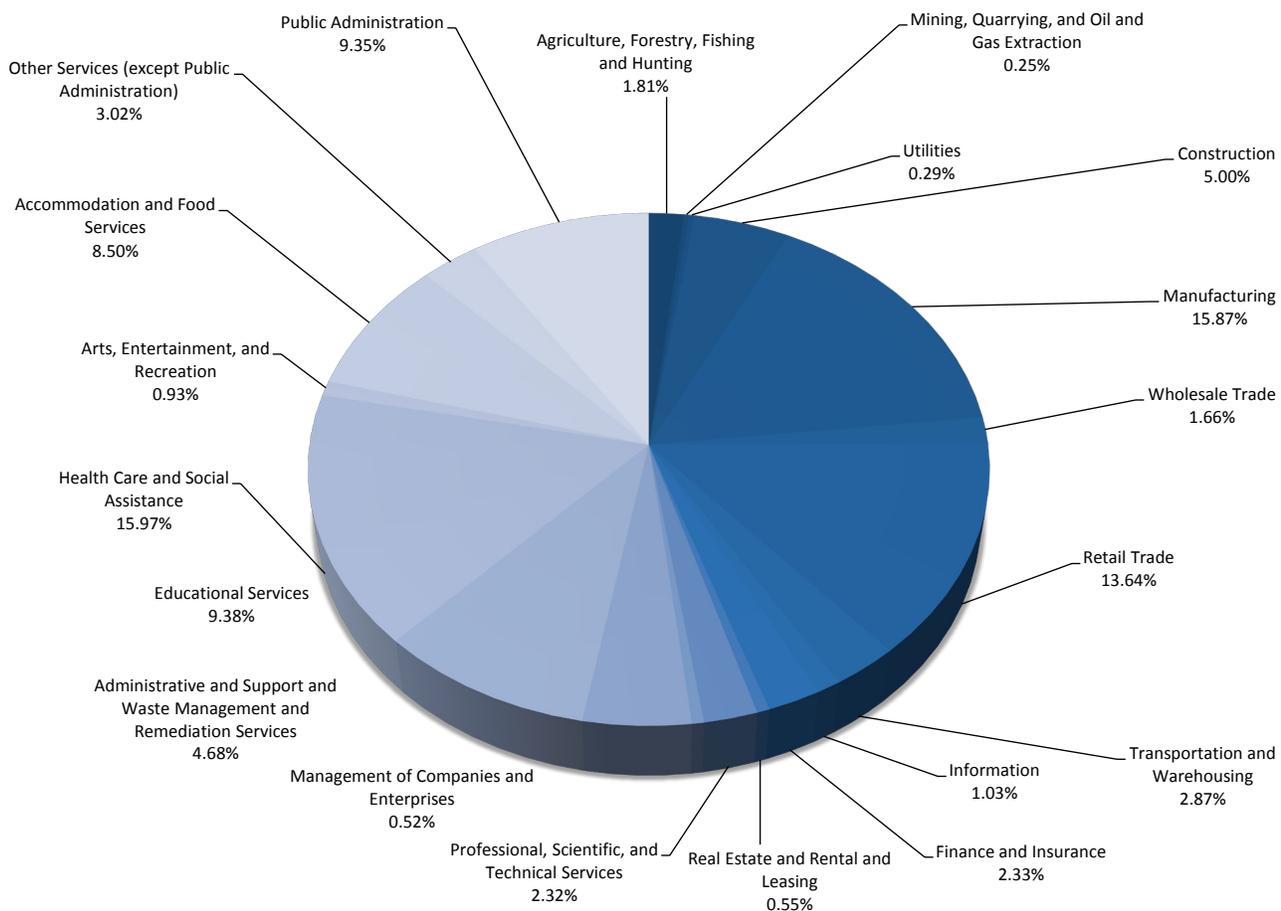
The economic changes this year in the Santee-Lynches LWIA demonstrate the shifting needs of employers and employees. Cultivating an understanding of the workforce allows all four counties to respond to anticipated future needs. Analyses help to identify the gap between what the workforce has in the way of talent and skills (supply), and what it may need in the future (demand).

The purpose of the Santee-Lynches LWIA Workforce Report is to present a comprehensive view of the status of Santee-Lynches LWIA’s economy and workforce. The report includes an analysis of Santee-Lynches LWIA’s workforce, industries, economic climate, and factors that will affect all. Forecasts will be made for the workforce, industries, and the economy.

ECONOMIC DISCUSSION: A CURRENT PICTURE OF THE WORKFORCE

EMPLOYMENT BY INDUSTRY

Figure 1: Santee-Lynches LWIA Employment By Industry - 3rd Quarter 2012



Source: Bureau of Labor Statistics (BLS), SC Department of Employment and Workforce (SCDEW), Quarterly Census of Employment and Wages (QCEW)

Health Care and Social Assistance and Manufacturing are the top two industries employing workers in the Santee-Lynches LWIA. Industries like Educational Services and Health Care and Social Assistance are healthy and flourishing, while others like Construction are still recovering from the recession. The 2010 per capita income for a Santee-Lynches LWIA resident was \$28,019, which was an increase of 37.7 percent from 2000.¹ Economic growth has taken place in the past decade to enhance the LWIA workforce, although the area is still recovering from a tough business cycle.

LOCATION QUOTIENT

A location quotient (LQ) is a useful tool for determining the concentration of workers in a given area. Location quotients compare the regional share of employment in a particular industry to the national share of employment in the same industry. The resulting quotient reveals the degree of regional specialization or concentration in an industry and provides insight into what makes the area unique in comparison to the national average. An LQ of 1.0 means the concentration of jobs in that industry matches the nation's value. Location quotients higher than 1.0 indicate the level of specialization the area has in particular sectors. Lower quotients can indicate possible industries that could be expanded.

Figure 2: Notable Santee-Lynches LWIA Location Quotients - 2011

Industry and Sectors	Location Quotient
<i>Clarendon County</i>	
Crop Production	6.6
Agriculture, Forestry, Fishing and Hunting	5.8
Gas Stations	5.1
<i>Kershaw County</i>	
Textile Mills	31.4
Forestry and Logging	15.9
Chemical Manufacturing	13.9
<i>Lee County</i>	
Forestry and Logging	31.8
Gas Stations	7.0
Crop Production	5.8
<i>Sumter County</i>	
Animal Production and Acquaculture	3.0
Heavy and Civil Engineering Construction	2.8
Fabricated Metal Product Manufacturing	2.7

Source: US Department of Labor, Bureau of Labor Statistics - http://data.bls.gov/location_quotient

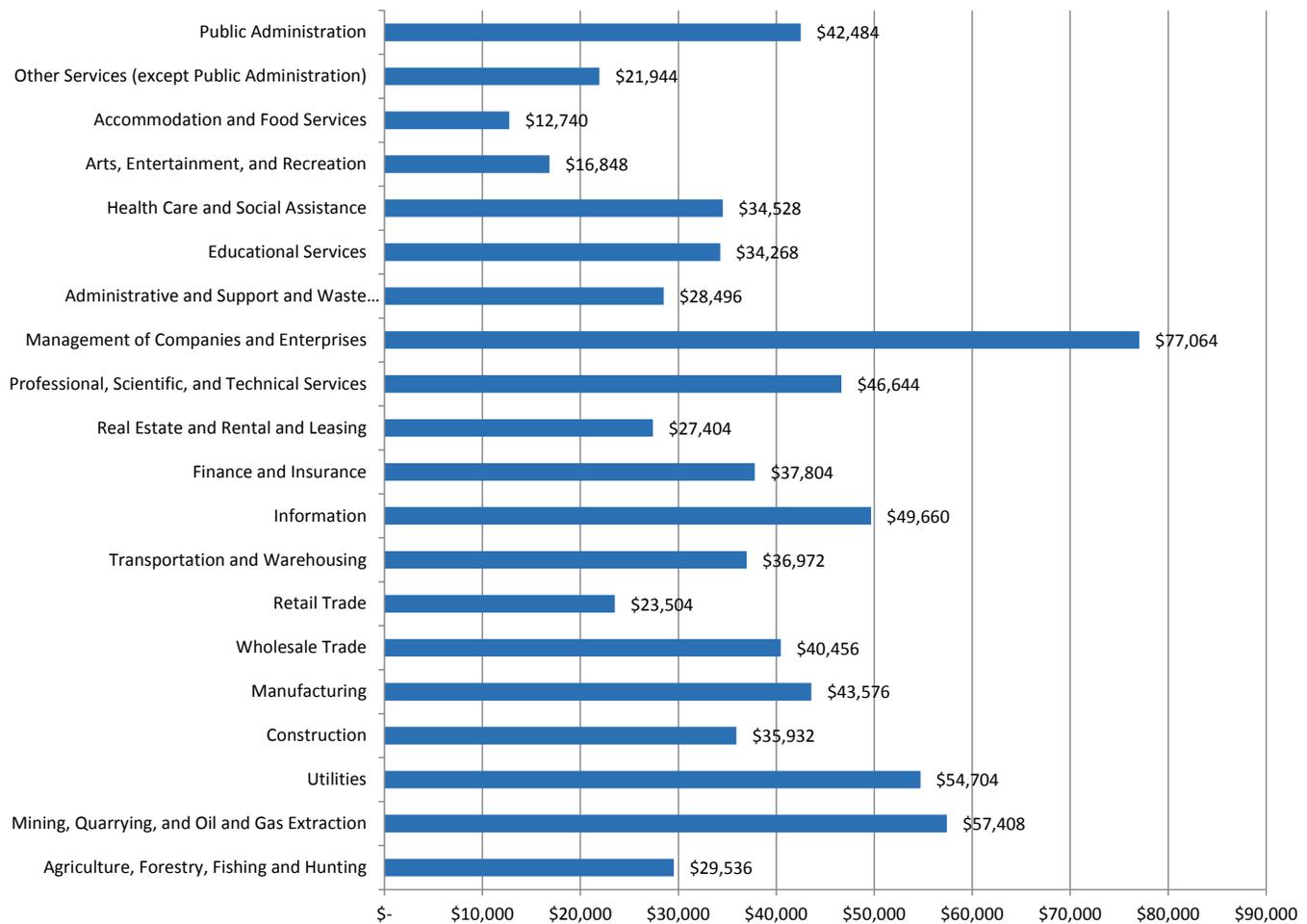
Textile Mills have one of the highest location quotients in the area at 31.4 in Kershaw County. Forestry and Logging are dominant sectors in Lee and Kershaw counties with LQ's of 31.8 and 15.9, respectively. Crop Production is concentrated in Clarendon and Lee counties. Diverse industries are found throughout the region including manufacturing, construction, natural resource developments, and retail gas stations.

AVERAGE ANNUAL WAGE BY INDUSTRY

The annual wages for the Management of Companies and Enterprises sector employees are the highest for any Santee-Lynches LWIA industry. Mining, Quarrying, and Oil and Gas Extraction workers are the second highest paid group of employees in the area.

A high wage industry like Professional, Scientific, and Technical Services usually requires at least a bachelor's degree. Having an education is an excellent way to enter a high-wage industry and have more options for employment.

Figure 3: Annual Average Wage by Industry - 3rd Quarter 2012



Source: BLS, SCDEW, QCEW

OCCUPATIONAL EMPLOYMENT

When examining the current occupational employment in the area, one can observe that some of the top 20 occupations are low-skill, low-pay jobs. These jobs, like Cashiers, Waiters and Waitresses, and Food Preparers, have high turnover. These are not necessarily the most robust jobs as far as wages, but they are jobs.

Figure 4 lists occupations, such as Registered Nurses, General and Operations Managers, and School Teachers, that pay a higher wage. With Health Care and Social Assistance, Manufacturing, and Retail Trade sectors comprising over 45 percent of the employment in the Santee-Lynches LWIA, the positions of Retail Salespersons; Elementary School Teachers; and Registered Nurses, not surprisingly, are listed among the top occupations.

Figure 4: Top 20 Occupations with Wages - 2012

Occupational Title	Total Employment	Hourly Average Wage (\$)
All Occupations	34,120	16.94
Cashiers	1,170	8.55
Retail Salespersons	1,110	12.48
Team Assemblers	980	16.06
Packers and Packagers, Hand	810	10.02
Combined Food Preparation and Serving Workers, Including Fast Food	780	8.29
Office Clerks, General	770	11.75
Laborers and Freight, Stock, and Material Movers, Hand	750	10.90
Security Guards	720	9.46
Registered Nurses	690	26.37
Machinists	680	15.86
Janitors and Cleaners, Except Maids and Housekeeping Cleaners	580	10.23
General and Operations Managers	520	42.41
Elementary School Teachers, Except Special Education	500	20.21
Home Health Aides	500	8.90
Waiters and Waitresses	490	8.45
Customer Service Representatives	490	13.35
Nursing Assistants	460	10.19
Middle School Teachers, Except Special and Career/Technical Education	440	21.97
Maintenance and Repair Workers, General	440	16.33
Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	430	14.72

Source: BLS, SCDEW, Occupational Employment Statistics (OES)

SKILLS DATA

Employers are beginning to see that a person's skills, in addition to their education, may help in determining who to hire. Many times the degree is not as important as the skills gained through specialized training and/or experience. In order to be able to determine the current level of skills in the area, the top 50 current occupations by employment are presented, and assigned a low, middle, or high skill designation to that occupation. The definitions for those skills levels are:

- **LOW:** No high school or GED, or high school/GED with less than one year experience and no on-the-job-training (OJT), or short-term OJT
- **MIDDLE:** High school/GED with one year experience, or moderate OJT, or long-term OJT, or apprenticeship, or postsecondary vocational training, or some college, or Associate's Degree, or less than a Bachelor's Degree
- **HIGH:** Bachelor's Degree or higher

In the Santee-Lynches area, 25 of the top 50 jobs in 2012 are considered low-skill jobs. Twenty-two are middle skill, and three are high-skill occupations.

Figure 5: Top Occupations By Skill Classification - Santee-Lynches 2012

Skillset: LOW
Cashiers
Childcare Workers
Combined Food Preparation and Serving Workers, Including Fast Food
Cooks, Fast Food
Cooks, Institution and Cafeteria
Cooks, Restaurant
Customer Service Representatives
Food Preparation Workers
Home Health Aides
Industrial Truck and Tractor Operators
Janitors and Cleaners, Except Maids and Housekeeping Cleaners
Laborers and Freight, Stock, and Material Movers, Hand
Landscaping and Groundskeeping Workers
Light Truck or Delivery Services Drivers
Maids and Housekeeping Cleaners
Office Clerks, General
Packers and Packagers, Hand
Receptionists and Information Clerks
Retail Salespersons
Secretaries and Administrative Assistants, Except Legal, Medical, and Executive
Security Guards
Stock Clerks and Order Fillers
Teacher Assistants
Tellers
Waiters and Waitresses
Skillset: MIDDLE
Automotive Service Technicians and Mechanics
Bookkeeping, Accounting, and Auditing Clerks
Carpenters
Electrical Power-Line Installers and Repairers
First-Line Supervisors of Construction Trades and Extraction Workers
First-Line Supervisors of Food Preparation and Serving Workers
First-Line Supervisors of Office and Administrative Support Workers
First-Line Supervisors of Production and Operating Workers
First-Line Supervisors of Retail Sales Workers
General and Operations Managers
Heavy and Tractor-Trailer Truck Drivers
Industrial Machinery Mechanics
Inspectors, Testers, Sorters, Samplers, and Weighers
Licensed Practical and Licensed Vocational Nurses
Machinists
Maintenance and Repair Workers, General
Medical Assistants
Nursing Assistants
Operating Engineers and Other Construction Equipment Operators
Registered Nurses
Sales Representatives, Wholesale and Manufacturing, Except Technical and Scientific Products
Team Assemblers
Skillset: HIGH
Accountants and Auditors
Elementary School Teachers, Except Special Education
Middle School Teachers, Except Special and Career/Technical Education

Source: BLS, SCDEW, OES, Workforce Intelligence (WI)

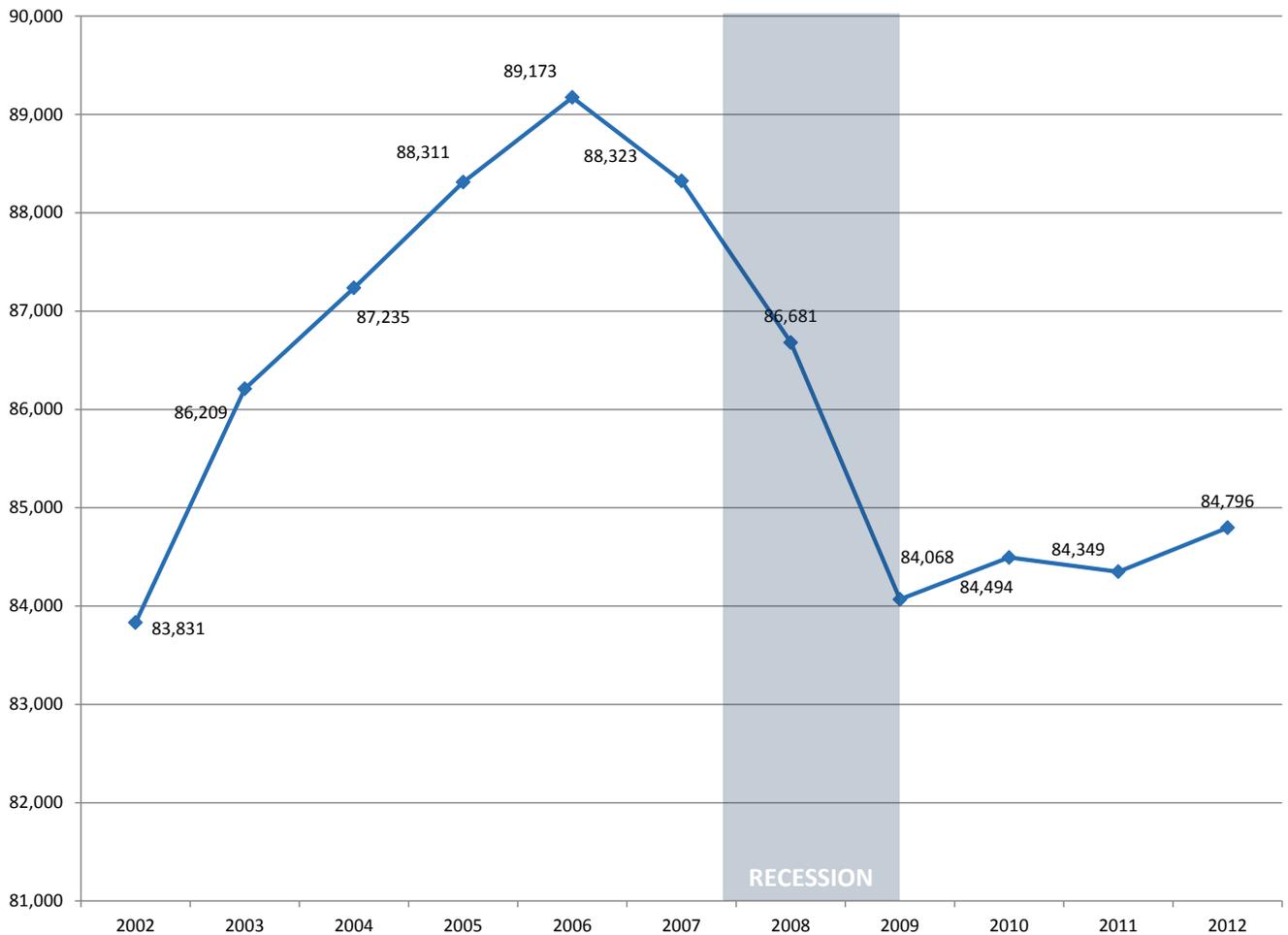
EMPLOYMENT AND UNEMPLOYMENT

A crucial indicator of the health of a workforce is its labor force levels. Labor force data count residents who are employed and unemployed. There are a few Federal definitions that will make discussion of the labor force a little easier to understand.

- Employed: Persons 16 years old or older who worked for pay any time during the week that includes the 12th of the month
- Unemployed: Persons 16 years old or older who are not working but want a job, and are able and willing to work
- Labor Force: Employed plus unemployed
- Unemployment Rate: Unemployment divided by labor force

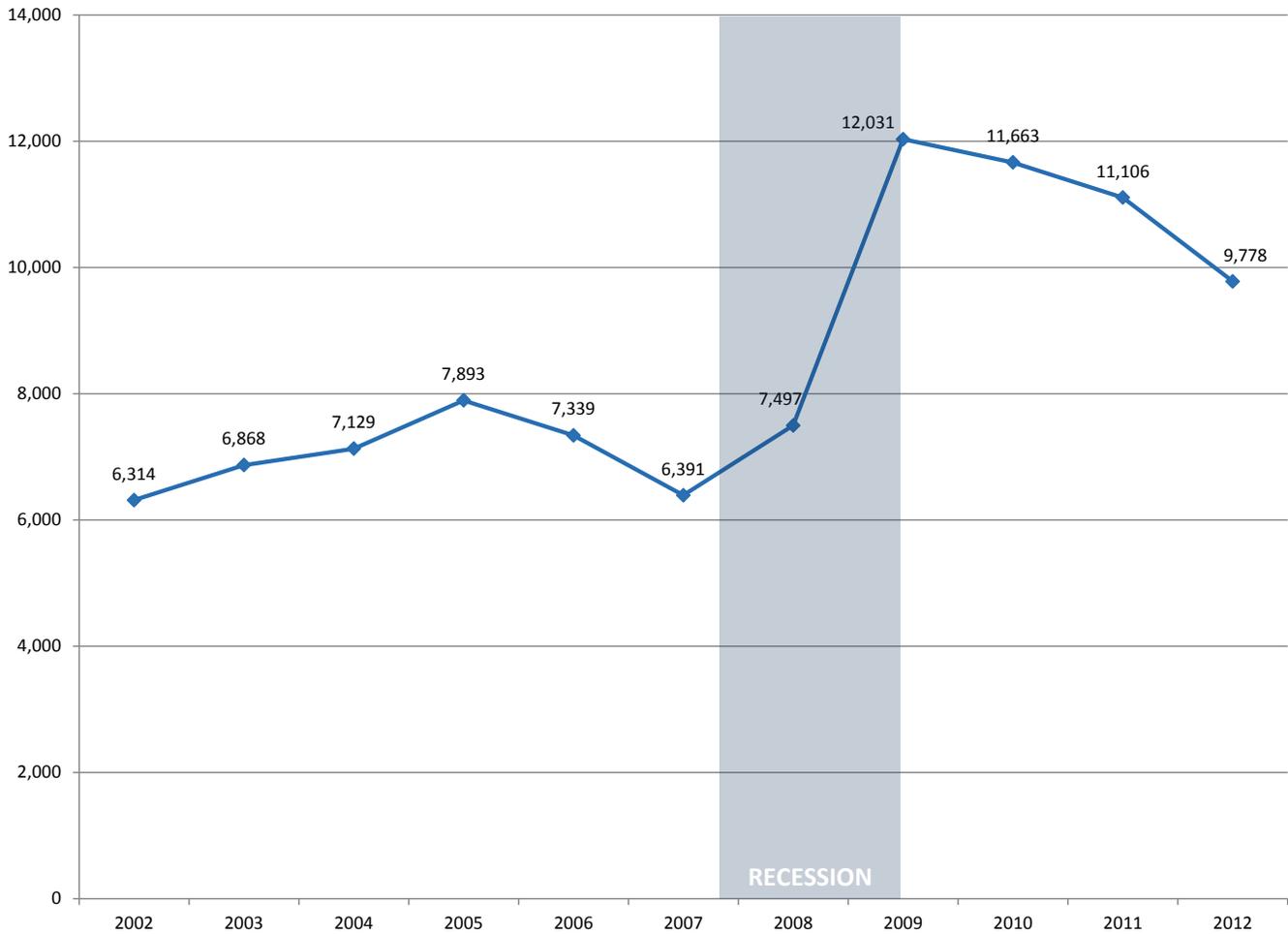
In Figure 6, the recession (officially from December 2007 through June 2009) had a great effect on the labor force. Employment dropped, and unemployment increased by 88 percent.

Figure 6: Employment - 2002-2012



Source: BLS, SCDEW, Local Area Unemployment Statistics (LAUS)

Figure 7: Unemployment - 2002-2012



Source: BLS, SCDEW, LAUS

Tracking annual unemployment rates give a good snapshot of the state of an area's workforce. Annual rates smooth out the usual ups and downs of a month-to-month rate (due to normal seasonal or cyclical changes) to give a more accurate picture.

Figure 8 shows the annual rates for the Santee-Lynches LWIA area and South Carolina. Santee-Lynches has historically been above the state's rate, and this was the same during and after the recession. During the recession, the Santee-Lynches' rate increased sharply from 6.7 percent in 2007 to 12.5 percent in 2009.

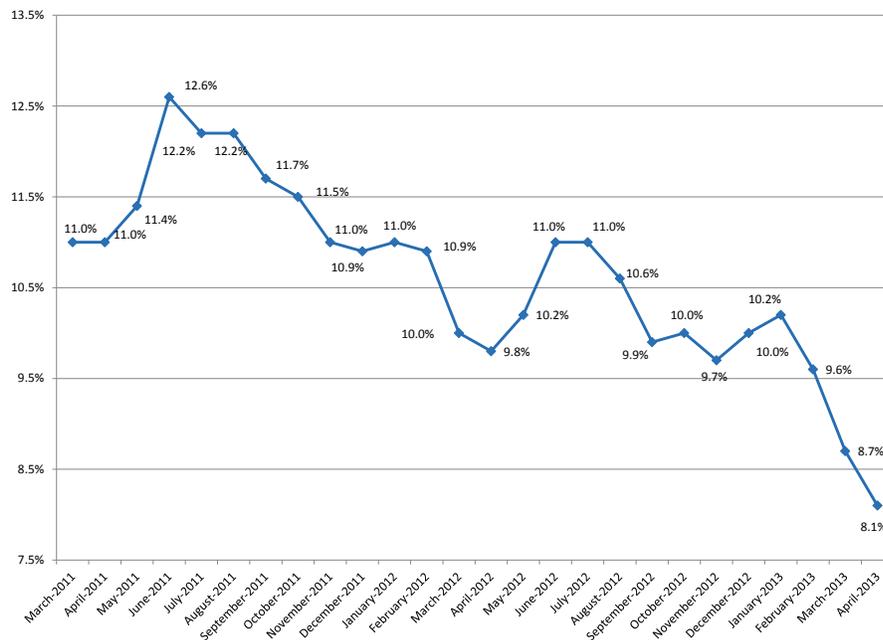
Figure 8: Annual Unemployment - 2002-2012



Source: BLS, SCDEW, LAUS

Figure 9 illustrates the monthly unemployment rate with its wide fluctuations since March 2011. The area seems to be steadily recovering from the recession.

Figure 9: Monthly Unemployment Rate - March 2011-April 2013



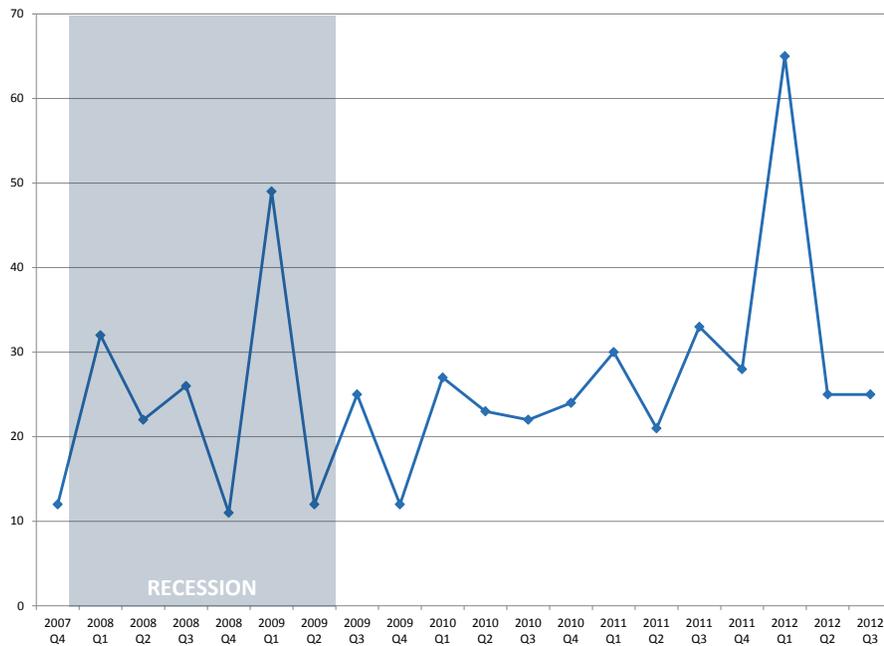
Source: BLS, SCDEW, LAUS

NEW STARTUP FIRMS

One way to see if an economy is improving is to examine data about startup firms. An increase in new companies might be an indicator of expansion in the area, whereas a drop in new firms shows a lack of confidence in the future. (Note: There is almost always a spike in startups in the first quar-

ter of the year.) Again, the recession had a major impact on normal business birth and death rates. Startups have been steady in the area with a large increase in early 2012.

Figure 10: New Startup Firms - 2007-2012



Source: BLS, SCDEW, QCEW

EMPLOYERS BY SIZE OF ESTABLISHMENT

By far, the largest category of business size in the area is small business. Small businesses (or establishments) are defined in South Carolina as companies employing 49 or fewer people. The Santee-Lynches LWIA has 94 percent of establishments designated as small businesses, while the state as a whole has 93 percent.

Small businesses may need more support and assistance than larger companies because they may not have a designated human resources department or person. They may rely on other resources, such as SC Works Centers, for help with hiring, training, or screening job candidates.

Figure 11: Employers by Size of Establishment - 3rd Quarter 2012

Employees	Santee-Lynches	South Carolina
0 to 4	2,097	63,766
5 to 9	793	19,667
10 to 19	486	13,316
20 to 49	323	9,881
50 to 99	134	3,907
100 to 249	68	2,433
250 to 499	15	757
500 to 999	9	328
1000 +	0	264

Source: BLS, SCDEW, QCEW

SUPPLY: WHAT'S OUT THERE?

A manufacturing assembly line needs to have resources and supplies on-hand so that the line does not have to stop. The same is true for the workforce. The supply of workers needs to be of the right quantity and quality to do the job. Is the supply of workers in line with what the companies in the Santee-Lynches LWIA need? Seven streams of workforce supply provide an indication: population, commuting, education of the population, clusters of high school students, awards earned at higher education institutions, and characteristics of unemployment insurance claims and claimants.

POPULATION BY AGE

Age distribution in the area is similar to the state for most segments of the population. In the prime working years of 20-39 age cohorts, Santee-Lynches has a lower proportion of population than the state as a whole does, and in the 50-59 age cohorts, the area has a higher proportion of population than the state.

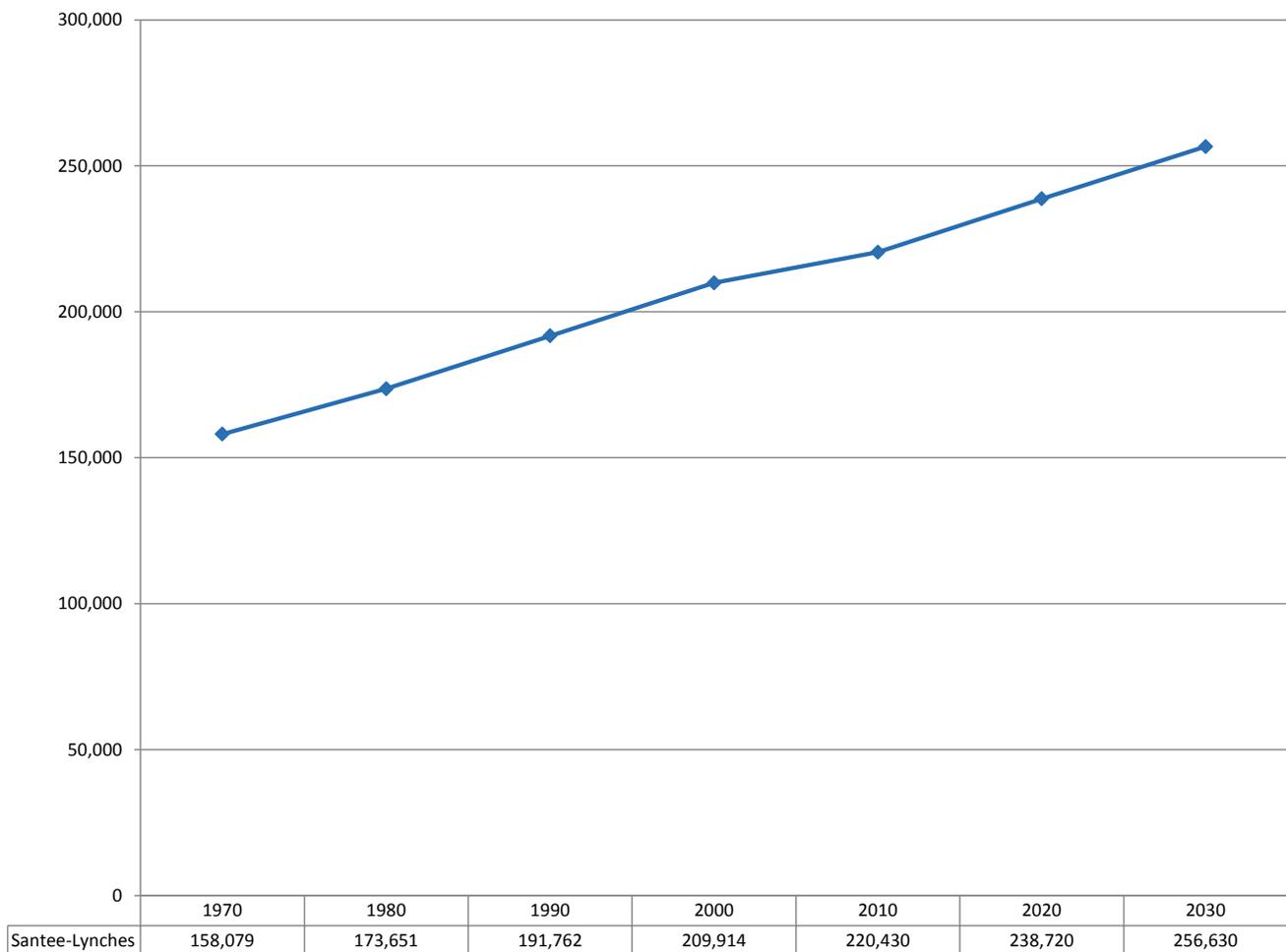
Figure 12: Population by Age

Age Range	Santee-Lynches	SC	US
0-4	6.8%	6.5%	6.6%
5-9	6.8%	6.4%	6.6%
10-14	6.7%	6.5%	6.7%
15-19	7.3%	7.2%	7.2%
20-24	7.0%	7.2%	7.0%
25-29	6.4%	6.6%	6.8%
30-34	5.7%	6.2%	6.4%
35-39	5.7%	6.5%	6.6%
40-44	6.8%	6.8%	7.0%
45-49	7.2%	7.2%	7.4%
50-54	7.4%	7.0%	7.2%
55-59	6.7%	6.5%	6.3%
60-64	5.8%	5.9%	5.3%
65-69	4.4%	4.5%	3.9%
70-74	3.5%	3.3%	3.0%
75-79	2.7%	2.5%	2.4%
80-84	1.8%	1.7%	1.9%
85 and older	1.3%	1.5%	1.7%

Source: US Bureau of Census, American Community Survey (ACS)

POPULATION CHANGE AND MIGRATION

Figure 13: Population Projections to 2030



Source: US Census Bureau, Census 2000, SC Department of Health and Environmental Control - Vital Records Department. Population projections calculated by SC Budget and Control Board, Office of Research and Statistics

After a small increase in population from 1990 to 2000 (up 9.5 percent), the growth of the population of this area slowed, growing just 5 percent over the next 10 years. Growth is projected to continue to increase less than 1 percent per year to 2030.

Figure 14: Population Migration - 2011 - 5-Year Estimate

	Total	Moved From Different State	Moved From Abroad	Moved From Different County	Moved Within Same County
Population 1 year and over	219,768	2.1%	0.3%	2.4%	5.5%
Hispanic or Latino origin (of any race)	6,798	5.2%	2.2%	3.8%	2.5%
White alone, not Hispanic or Latino	114,368	2.5%	0.2%	2.4%	4.8%
Population 25 Years and Over					
Less than high school graduate	29,360	1.1%	0.3%	2.6%	6.5%
High school graduate/GED	50,311	1.0%	0.1%	1.7%	3.9%
Some college or associate's degree	41,931	2.2%	0.3%	1.7%	3.8%
Bachelor's degree	15,054	2.1%	0.6%	2.1%	2.9%
Graduate or professional degree	8,643	3.5%	0.5%	1.6%	2.0%

Source: US Census Bureau, ACS, SCDEW

In-migration (people moving into Santee-Lynches) shows that 4 percent of residents with a graduate degree and 2.7 percent of those with a bachelor's degree came from out of state or out of the country. While Hispanics moved into Santee-Lynches LWIA from a different state at more than twice the rate of Whites, they moved into Santee-Lynches from abroad at over 10 times the rate of Whites. As 10 percent of residents over the age of one moved, only 2.4 percent came from outside of South Carolina.

COMMUTING PATTERNS

The vast majority of the workers (69 percent) of the Santee-Lynches area lives and works in the LWIA. The tables in Figure 15 show that nearly 8,500 workers commute in from other areas to work in the LWIA. Richland County draws a notable portion of Santee-Lynches LWIA's residents out of the area to work. Over 12,000 more employees leave the area to work than commute into it.

Figure 15: Commuting Patterns - 2010

To Santee-Lynches WIA From	8,452	From Santee-Lynches WIA To	20,835
Richland County, SC	2,849	Richland County, SC	11,938
Florence County, SC	1,048	Florence County, SC	2,024
Darlington County, SC	650	Lexington County, SC	1,446
Lancaster County, SC	634	Orangeburg County, SC	847
		Darlington County, SC	819

Source: US Census Bureau, ACS

EDUCATIONAL ATTAINMENT

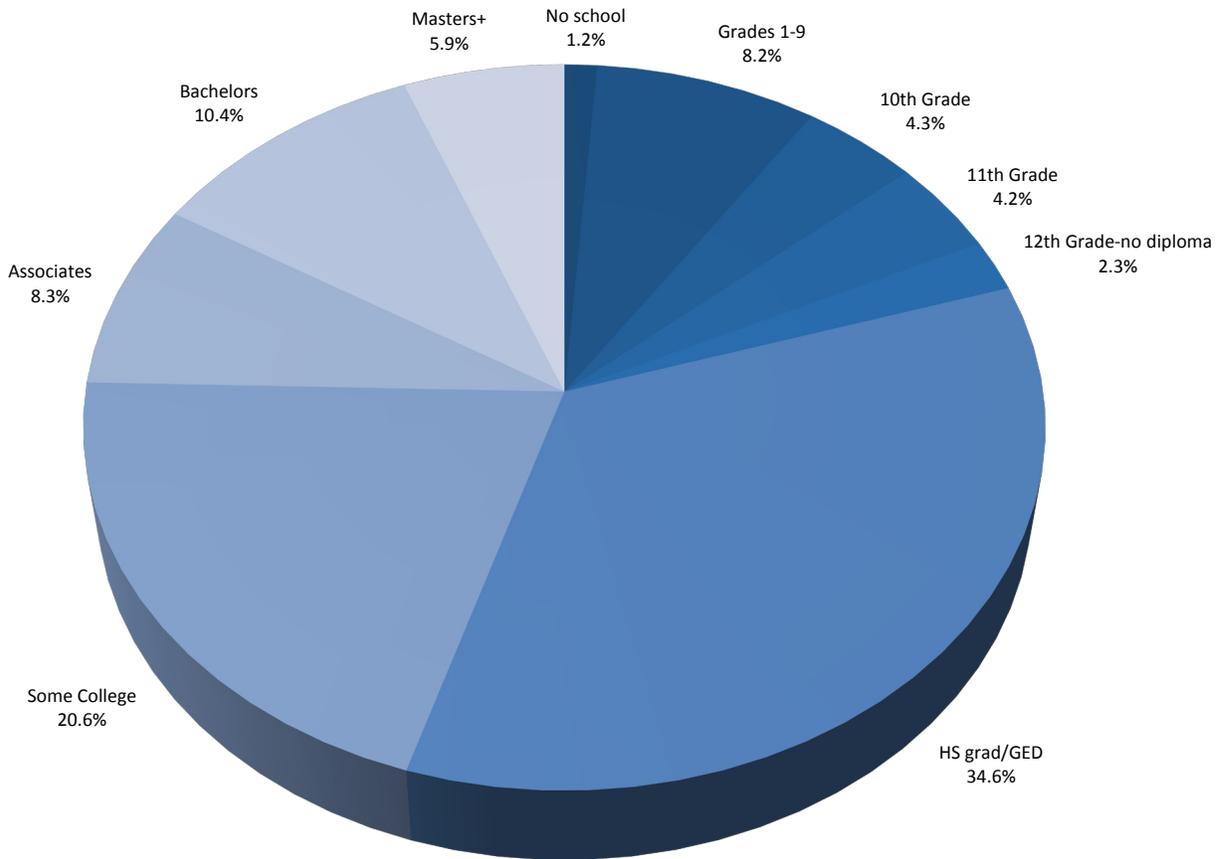
The Santee-Lynches LWIA has a higher concentration of residents with a high school diploma or GED or some college education than the state as a whole but a lower concentration with an associate's degree or higher than the state.

Figure 16: Educational Attainment - Santee-Lynches and South Carolina 2011

Education Level	Santee-Lynches	SC
No school	1.2	1.1
Grades 1-9	8.2	7.0
10th Grade	4.3	3.3
11th Grade	4.2	3.2
12th Grade-no diploma	2.3	1.8
HS grad/GED	34.6	30.9
Some College	20.6	20.1
Associates	8.3	8.4
Bachelors	10.4	15.6
Masters+	5.9	8.6

Source: US Census Bureau, ACS

Figure 17: Educational Attainment - Santee-Lynches 2011

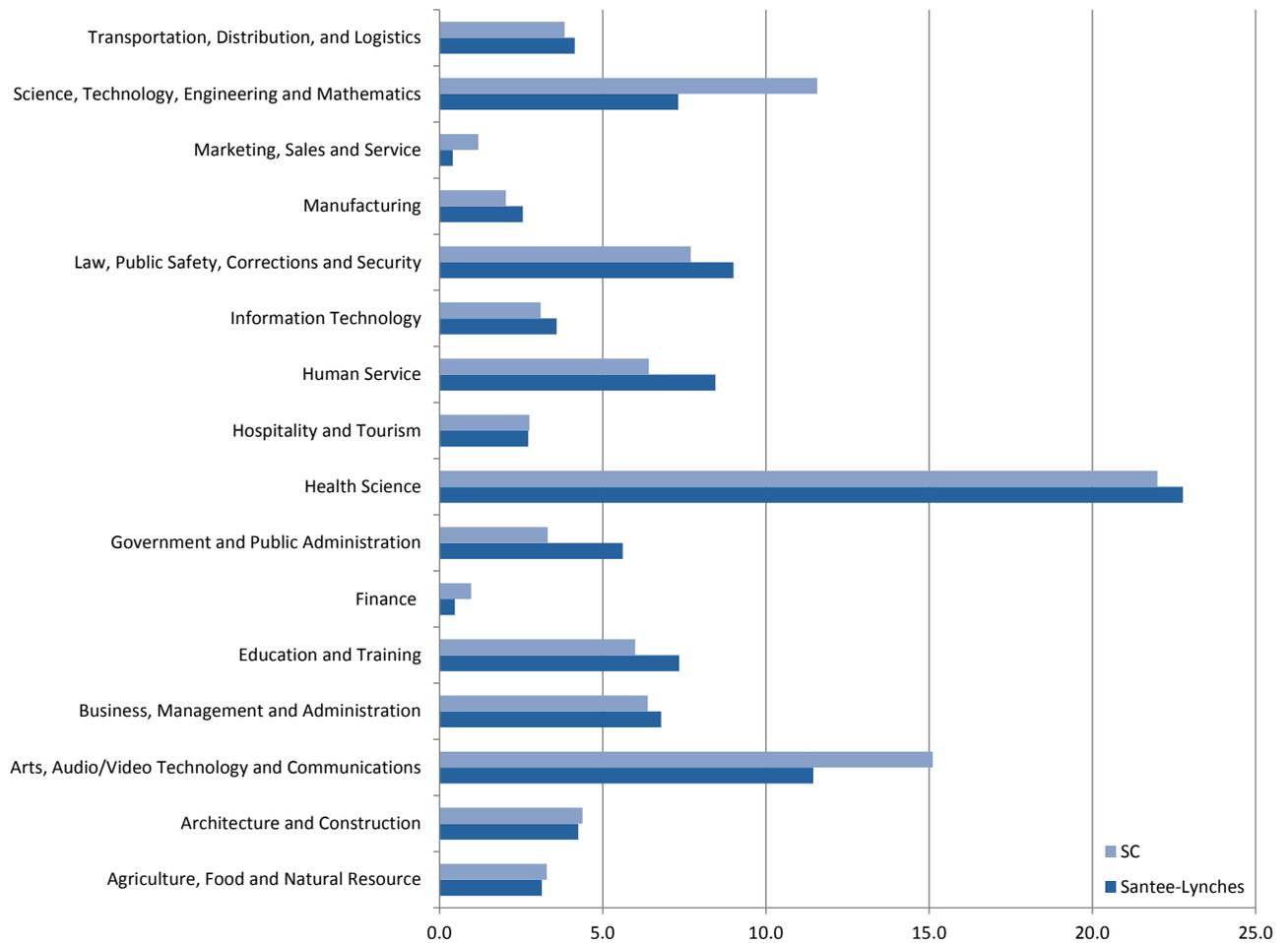


Source: US Census Bureau, ACS, SCDEW

CAREER CLUSTERS SELECTED BY HIGH SCHOOL STUDENTS

Eighth-grade students in South Carolina are required to choose a career cluster to concentrate on to lead them to a post-high school job or college major. There are 16 career clusters.

Figure 18: Percent of Students Declaring a Career Clusters In Santee-Lynches and SC - 2012



Note: Declared clusters for students declaring a specific cluster on their primary Electronic Individual Graduation Plan (e-IGP) for 2011-2012 year

Source: SC Department of Education

The Health Science career cluster is the top choice for students in the Santee-Lynches area likely in response to news of a shortage of healthcare workers in South Carolina. In keeping with the state trend, the area’s students also picked Arts, Audio/Video Technology and Communications in notable numbers. The Law, Public Safety, Corrections and Security cluster was a choice for many students.

Figure 19: Career Clusters - 2012

Cluster	Santee-Lynches	SC
Agriculture, Food and Natural Resource	3.1	3.3
Architecture and Construction	4.3	4.4
Arts, Audio/Video Technology and Communications	11.5	15.1
Business, Management and Administration	6.8	6.4
Education and Training	7.3	6.0
Finance	0.5	1.0
Government and Public Administration	5.6	3.3
Health Science	22.8	22.0
Hospitality and Tourism	2.7	2.8
Human Service	8.5	6.4
Information Technology	3.6	3.1
Law, Public Safety, Corrections and Security	9.0	7.7
Manufacturing	2.6	2.0
Marketing, Sales and Service	0.4	1.2
Science, Technology, Engineering and Mathematics	7.3	11.6
Transportation, Distribution, and Logistics	4.1	3.8

Source: SC Department of Education

DEGREES AWARDED

In higher education, Santee-Lynches area colleges and universities have conferred a wide variety of awards. Of the top 20, Liberal Arts and Sciences is the most popular followed by Registered Nursing and Data Processing. The institutions included in this data are Central Carolina Technical College, Morris College, and USC-Sumter.

Figure 20: Top 20 Majors in Santee-Lynches - 2011

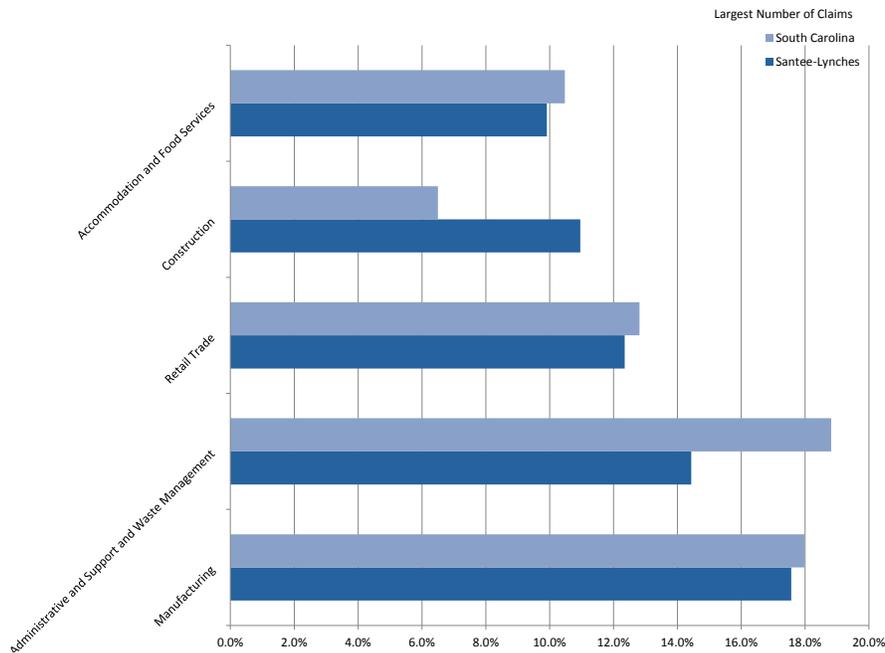
Majors	
Liberal Arts and Sciences/Liberal Studies	283
Registered Nursing/Registered Nurse	160
Data Processing & Data Processing Technology	33
Accounting	29
Business Administration and Management, General	25
Welding Technology/Welder	25
Criminal Justice/Law Enforcement Administration	22
Business Administration, Management and Operations	20
Industrial Mechanics and Maintenance Technology	20
Biology/Biological Sciences, General	19
Child Care Provider/Assistant	19
Child Care and Support Services Management	18
Administrative Assistant and Secretarial Science	17
Community Health Services/Liaison/Counseling	16
Legal Assistant/Paralegal	13
Sociology	13
Licensed Practical/Vocational Nurse Training	12
Medical/Clinical Assistant	11
Machine Tool Technology/Machinist	10
Criminal Justice/Safety Studies	9
Natural Resources Management and Policy	9

Source: SC Commission on Higher Education, http://www.che.sc.gov/New_Web/Data&Pubs.htm

CHARACTERISTICS OF UI CLAIMS BY OCCUPATION

Another source of supply for the workforce is people who are receiving unemployment compensation. In the Santee-Lynches LWIA area, the highest number of claims is filed in the Manufacturing sector followed by Administrative and Support and Waste Management industry and the Retail Trade group. The Administrative and Support and Waste Management group includes office administrative services; facilities support services; employment services; services to buildings and dwellings; and waste collection, treatment, and disposal services. These sectors highlight the diverse industries in the economy of the Santee-Lynches LWIA and its support.

Figure 21: Characteristics of UI Claims by Occupation - April 2013



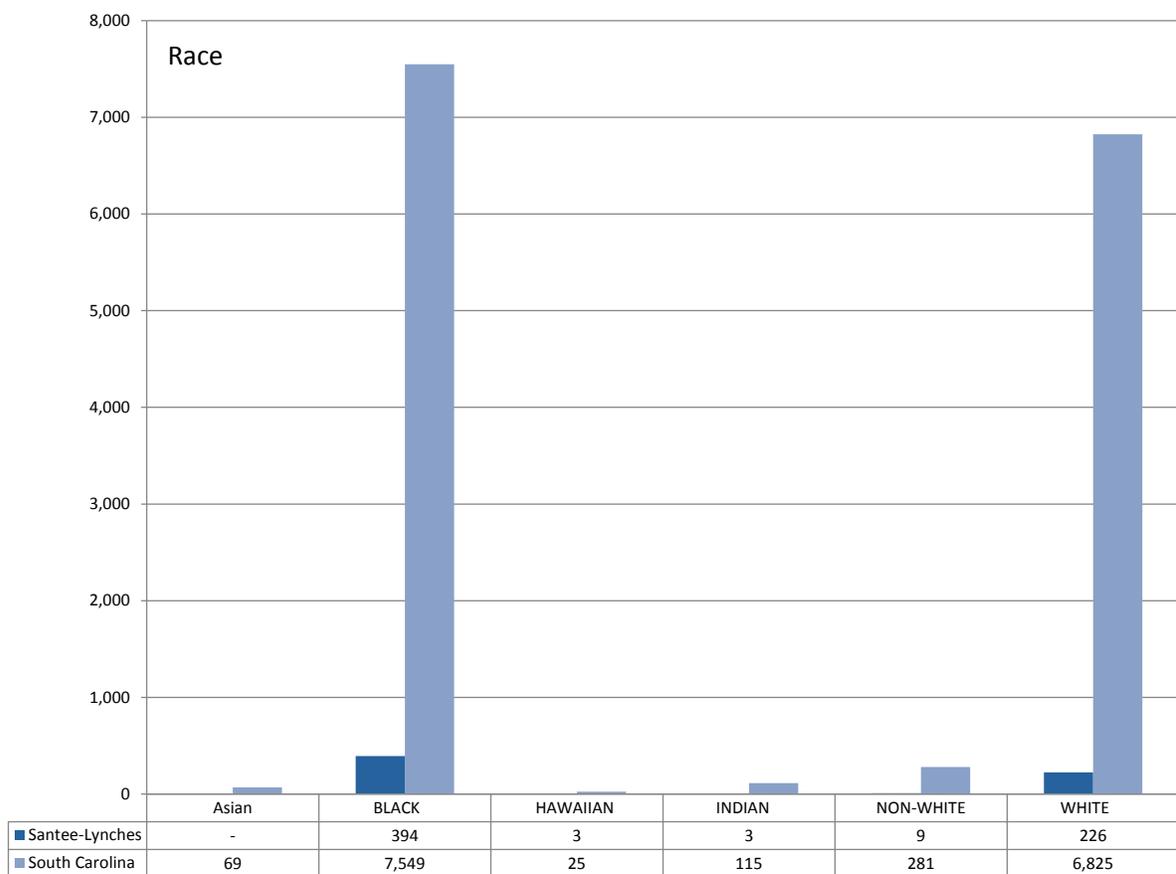
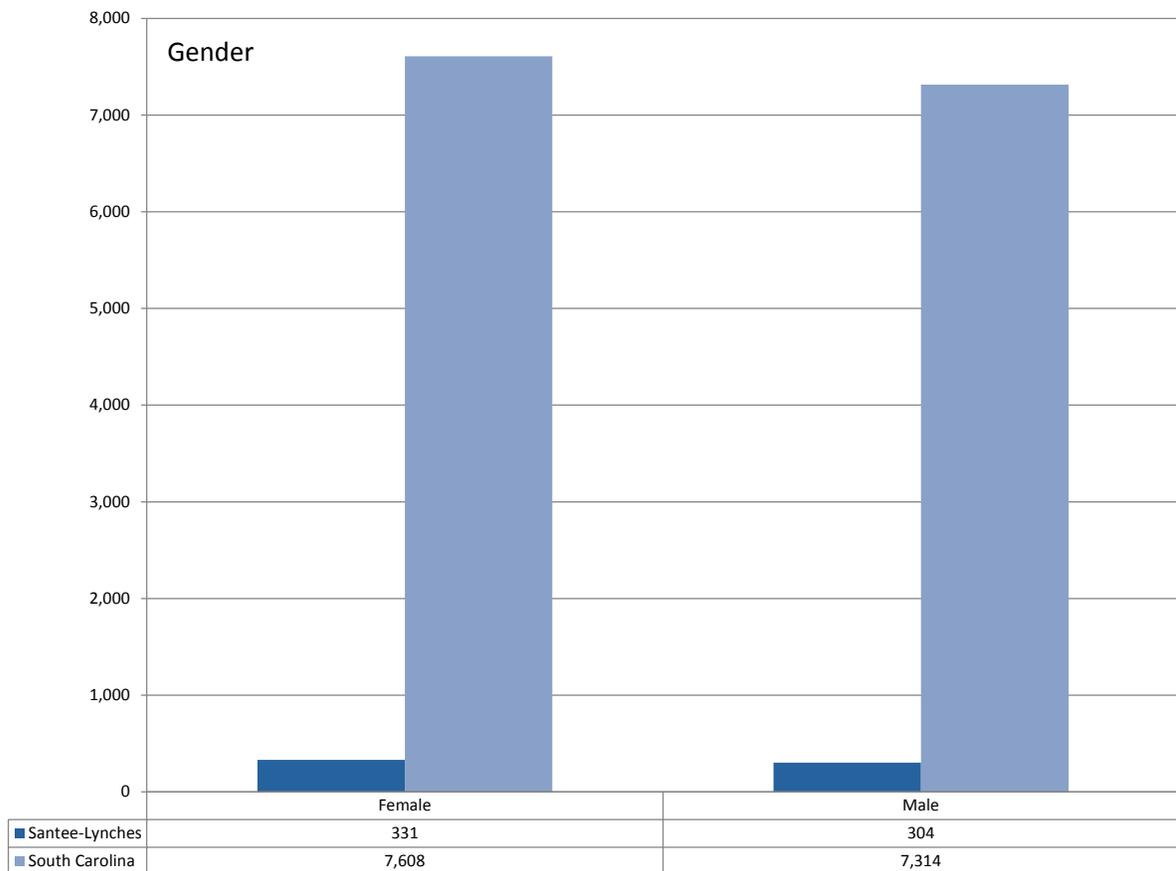
Occupation	Santee-Lynches	South Carolina
Manufacturing	101	2,267
Administrative and Support and Waste Management	83	2,373
Retail Trade	71	1,616
Construction	63	820
Accommodation and Food Services	57	1,321
Health Care and Social Assistance	54	1,076
Professional, Scientific, and Technical Services	35	698
Other Services (except Public Administration)	19	292
Agriculture, Forestry, Fishing and Hunting	13	98
Wholesale Trade	13	445
Finance and Insurance	13	300
Transportation and Warehousing	12	414
Educational Services	12	222
Public Administration	12	206
Real Estate and Rental and Leasing	11	213
Information	3	122
Arts, Entertainment, and Recreation	2	94
Management of Companies and Enterprises	1	35

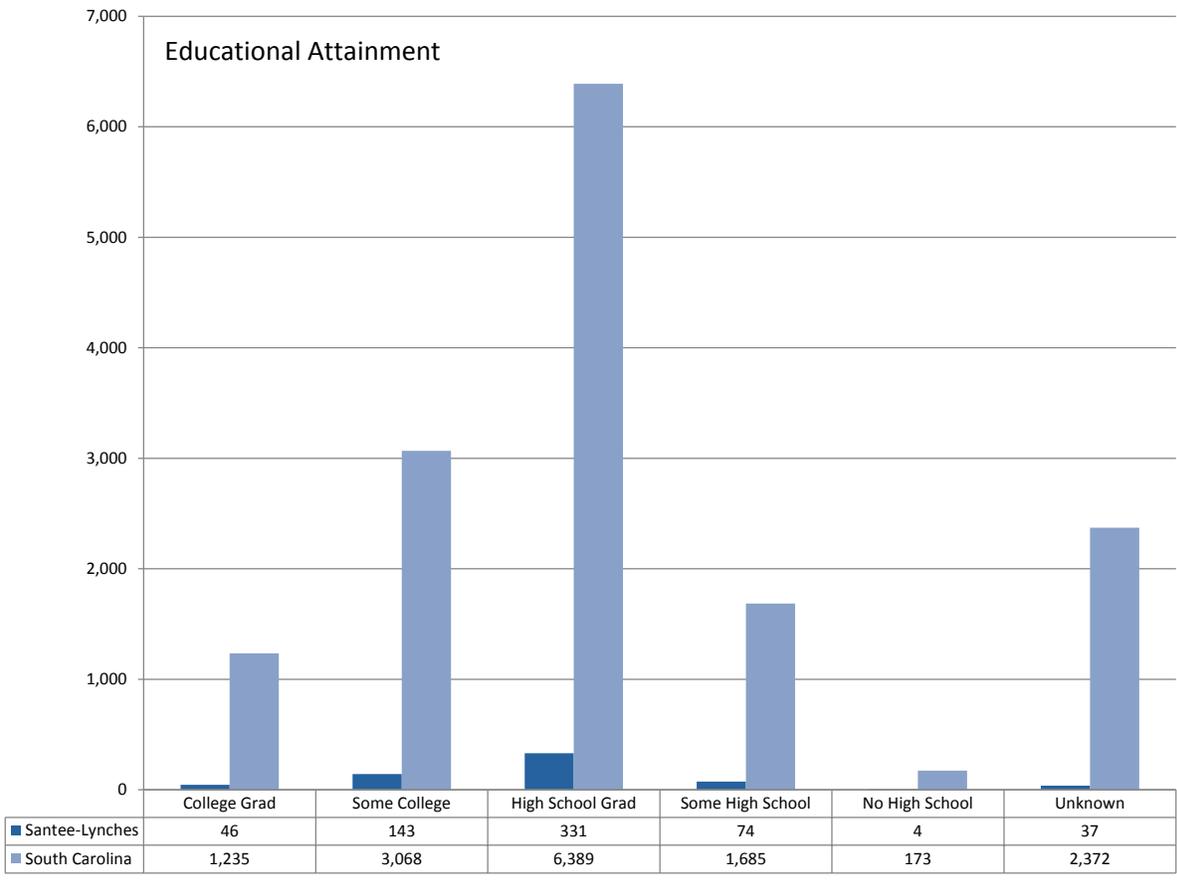
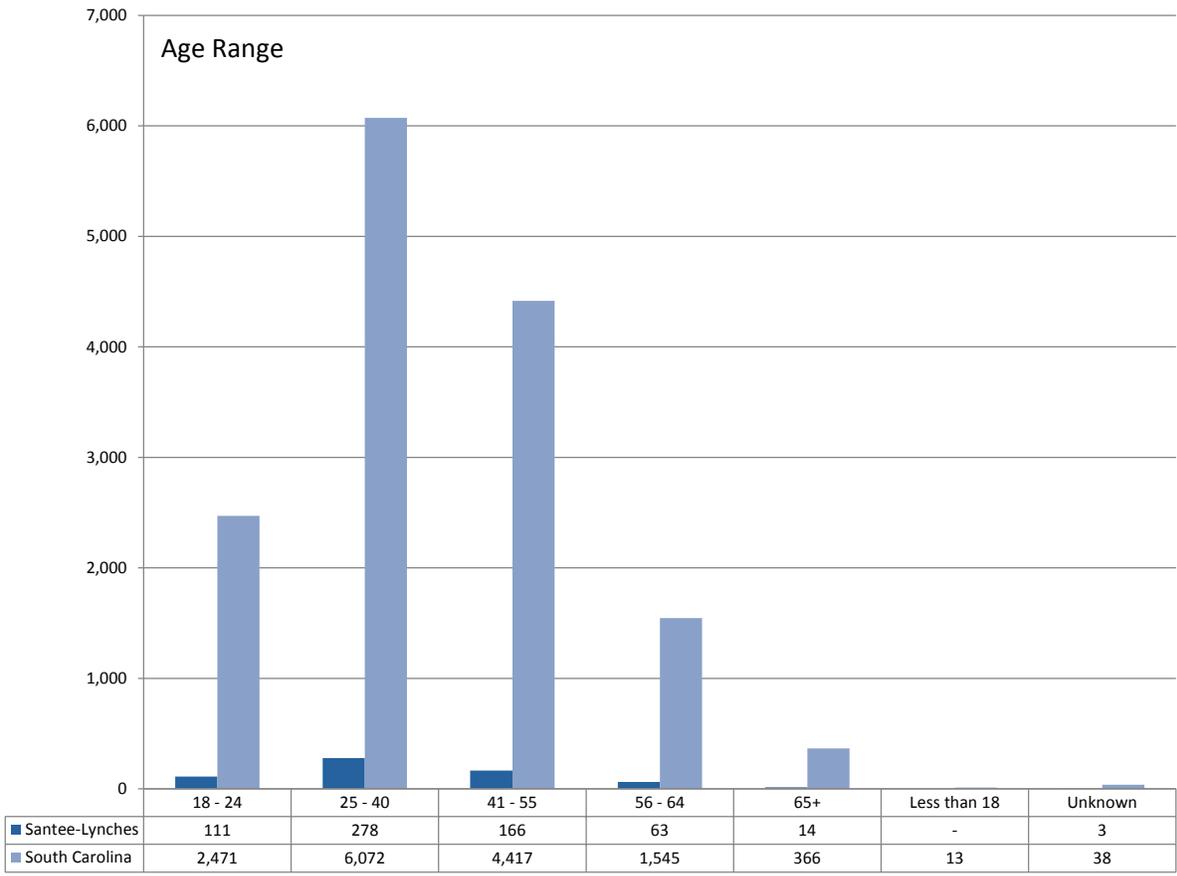
Source: SCDEW

UNEMPLOYMENT INSURANCE CLAIMANT CHARACTERISTICS

The people in this area who were receiving unemployment insurance benefits in April 2013 were typically female, black, 25-40 years old, and were high school graduates or earned a GED.

Figure 22: UI Claimant Characteristics - April 2013





Source: SCDEW

DEMAND: WHAT DO WE NEED?

Workforce demand shows what is needed in an area to support current and future employers. This section examines current (real-time) demand through online job advertisements, industry and occupational projections to 2018, educational requirements for future jobs, and the skills needed for those occupations.

Online job advertisements give a snapshot of what positions need to be filled in an area. The data is from the Conference Board Help Wanted OnLine® Data Series (HWOL) which measures the number of new and reposted job ads from over 16,000 Internet job boards. In April 2013, the largest occupational group with job ads in the Santee-Lynches LWIA was Healthcare Practitioners and Technical Occupations, followed by Transportation and Material Moving Occupations and Sales and Related Occupations.

ONLINE JOB ADVERTISEMENTS

Figure 23: Santee-Lynches HWOL - April 2013 by Major Group

Occupation	# of Job Ads
Healthcare Practitioners and Technical Occupations	279
Transportation and Material Moving Occupations	129
Sales and Related Occupations	123
Production Occupations	122
Architecture and Engineering Occupations	114
Office and Administrative Support Occupations	84
Management Occupations	78
Computer and Mathematical Occupations	74
Installation, Maintenance, and Repair Occupations	69
Food Preparation and Serving Related Occupations	68
Miscellaneous	64
Healthcare Support Occupations	59
Business and Financial Operations Occupations	35
Education, Training, and Library Occupations	31
Arts, Design, Entertainment, Sports, and Media Occupations	22
Protective Service Occupations	21
Construction and Extraction Occupations	21
Community and Social Services Occupations	15
Personal Care and Service Occupations	14
Building and Grounds Cleaning and Maintenance Occupations	9
Life, Physical, and Social Science Occupations	8
Legal Occupations	3
Military Specific Occupations	2
Farming, Fishing, and Forestry Occupations	1

Note: A job advertisement may include multiple openings.

Source: The Conference Board Help Wanted OnLine® Data Series (HWOL)

INDUSTRY PROJECTIONS

The Health Care and Social Assistance industry is projected to have the largest increase in employment from 2008 to 2018, growing by 1,360 jobs or 136 jobs/year. This sector includes services such as ambulatory health care services, hospitals, nursing and residential care facilities, and social assistance services. The Transportation and Warehousing category reports the next largest growth with a projected 35 openings/year followed by Professional, Scientific, and Technical Services with 34 jobs/year.

Figure 24: Industry Projections - 2008-2018

Industry	Estimate Employment (2008)	Projected Employment (2018)	Change	Percent Change	Annual Percent Change
Total Employment, All Jobs	73,453	75,338	1,885	2.57	0.25
Health Care and Social Assistance	8,099	9,459	1,360	16.79	1.56
Transportation and Warehousing	1,893	2,239	346	18.28	1.69
Professional, Scientific, and Technical Services	1,344	1,680	336	25.00	2.26
Accommodation and Food Services	5,191	5,523	332	6.40	0.62
Other Services (Except Government)	3,115	3,443	328	10.53	1.01
Administrative and Support and Waste Management and Remediation	2,176	2,420	244	11.21	1.07
Government	6,911	7,127	216	3.13	0.31
Wholesale Trade	1,177	1,354	177	15.04	1.41
Retail Trade	8,673	8,755	82	0.95	0.09
Information	655	705	50	7.63	0.74
Management of Companies and Enterprises	344	393	49	14.24	1.34
Construction	4,340	4,381	41	0.94	0.09
Arts, Entertainment, and Recreation	634	640	6	0.95	0.09
Utilities	156	161	5	3.21	0.32
Real Estate and Rental and Leasing	385	389	4	1.04	0.10
Finance and Insurance	1,497	1,455	-42	-2.81	-0.28
Educational Services	6,802	6,420	-382	-5.62	-0.58
Manufacturing	12,179	11,113	-1,066	-8.75	-0.91

Source: BLS, SCDEW, QCEW, WI

OCCUPATIONAL PROJECTIONS

Many of the occupations that are projected to have numerous openings between 2008 and 2018 in this area support a growing economy. Healthcare occupations lead the projected employment listing with three of the top four positions, as shown in Figure 25.

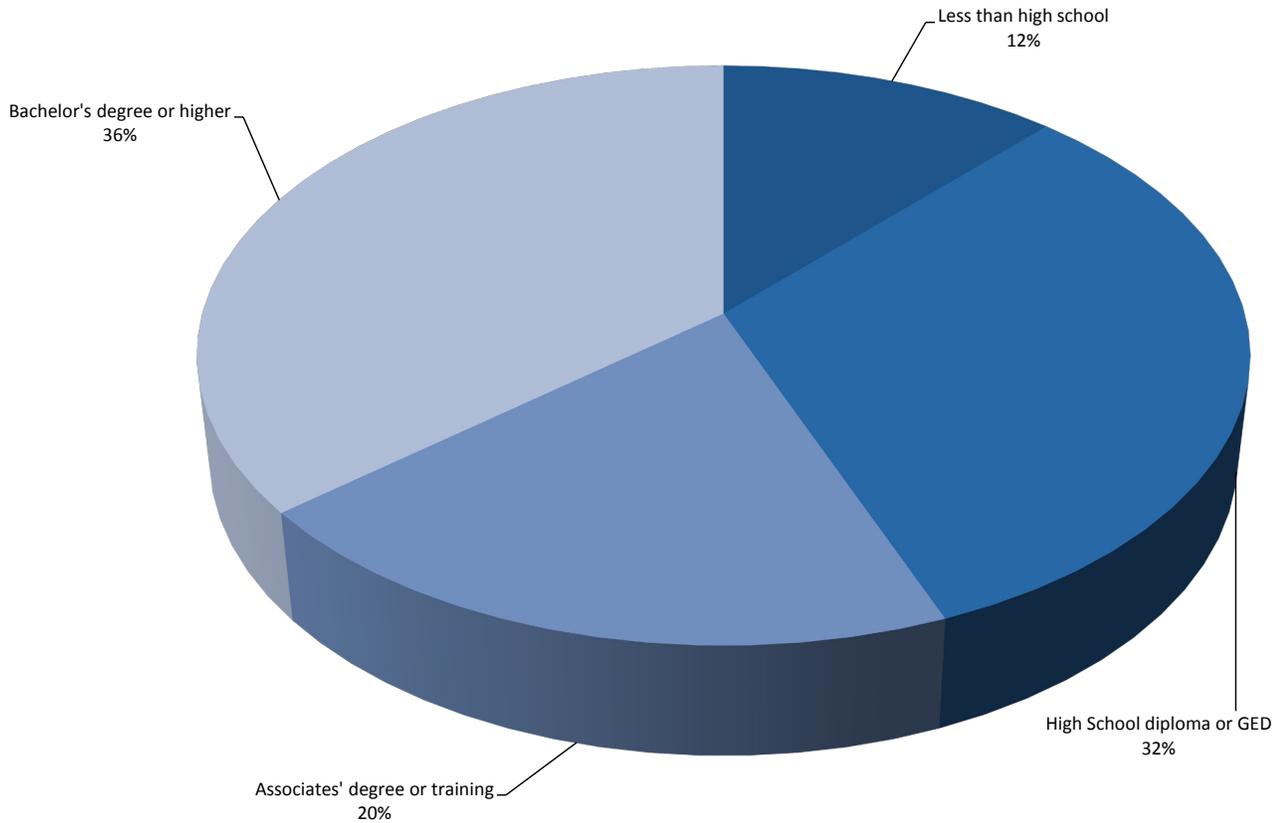
Figure 25: Growing Occupations - 2008-2018

Occupation	Estimated Employment (2008)	Projected Employment (2018)
Truck Drivers, Heavy and Tractor-Trailer	957	1,134
Pharmacy Technicians	245	318
Medical Assistants	209	279
Dental Assistants	182	253
Billing and Posting Clerks and Machine Operators	208	242
Public Relations Specialists	147	178
Cost Estimators	122	144
Dental Hygienists	89	125
Medical and Public Health Social Workers	92	117
Compliance Officers, Except Agriculture, Construction	77	98
Physical Therapists	83	98
Internists, General	69	90
Paralegals and Legal Assistants	67	81
Occupational Therapists	62	75
Physicians and Surgeons, All Other	42	54
Taxi Drivers and Chauffeurs	38	46
Physical Therapist Assistants	35	41
Farm Equipment Mechanics	34	40
Physical Therapist Aides	14	18
Occupational Health and Safety Specialists	10	13

Source: BLS, SCDEW, OES, WI

Of the top 50 projected growing occupations by percent change, 16 require a high school diploma or GED, six require less than a high school diploma or GED, 18 require a bachelor's degree or higher, and 10 need an associate's degree or require some kind of postsecondary training. The six occupations requiring less than a high school diploma or GED do require short-term on-the-job training (OJT), which is defined by the US Department of Labor as less than one month.

Figure 26: Education for Top 50 Projected Occupations



Source: BLS, SCDEW, OES, WI

It is just as important to know which occupations are declining in the area. Declines are often due to technological advances (i.e. computers or robots replacing humans), so many of the declining occupations are projected to be manual labor jobs, as shown in Figure 27.

Figure 27: Top 20 Projected Declining Occupations in Santee-Lynches - 2008-2018

Occupation
Chemical Technicians
Credit Authorizers, Checkers, and Clerks
Data Entry Keyers
File Clerks
Furnace, Kiln, Oven, Drier, & Kettle Oper. & Tenders
Helpers--Production Workers
Human Resources Assistants, Except Payroll and Time
Industrial Production Managers
Machine Feeders and Offbearers
Meter Readers, Utilities
Mixing and Blending Machine Setters, Operators
Order Clerks
Packaging & Filling Machine Operators & Tenders
Painters, Construction and Maintenance
Payroll and Timekeeping Clerks
Postal Service Clerks
Purchasing Managers
Roofers
Sewing Machine Operators
Shipping, Receiving, and Traffic Clerks

Source: BLS, SCDEW, OES, WI

SKILLS OF PROJECTED OCCUPATIONS

Using the top 50 projected growing occupations, the skill levels needed for the future workforce based on the definitions given earlier in this report can be categorized.

Figure 28: Skill Levels

Low	11
Middle	21
High	18

Source: BLS, SCDEW, OES, WI

Low-skilled jobs often have commensurate (i.e. low) pay and do not require much education, experience, or OJT. Does the supply of workers have the right skills for the jobs in the future?

WORKFORCE CHALLENGES

The current economic situation in the Santee-Lynches LWIA, the supply of workers, and the characteristics of workers who will be in demand has been reviewed. What can be gleaned from these findings? Are there gaps between supply and demand?

Supply Findings

The population looks to grow slowly to 2030, and with a smaller-than-the-state share of 20-39 year olds in their prime working age, this area looks to have challenges in having a proper mix of workers. In addition, in-migration from other states/countries adds few residents at the top end of the educational spectrum. The Santee-Lynches LWIA has a lower percent of residents aged 25 and older with an associate's degree or higher than the state does as a whole.

Many high school students selected the Health Science career cluster in keeping with state trends. The next most popular career cluster was Arts, Audio/Video/Technology, and Communications followed by Law, Public Safety, Corrections and Security.

Demand Findings

Employer demand was consistent between online advertisements (current) and 2018 projected occupations (long-term needs) in general. Both had the need for workers in Marketing, Sales, and Service; Health Science; and Business, Management, and Administration. Transportation, Distribution, and Logistics has a short-term need, while Hospitality and Tourism was a long-term need. Nearly all of the top projected growing occupations require at least a high school diploma or GED.

Figure 29: Comparison of Supply and Demand

	Demand		Supply	
	Top online ads (Short-Term)	Projected Occupations (Long-Term)	Degrees Earned (Short-Term)	Career Clusters Selected (Long-Term)
Agriculture, Food and Natural Resource	1.8	6.7	2.4	3.1
Architecture and Construction	4.0	6.2	0.6	4.3
Arts, Audio/Video Technology and Communications	1.0	0.5	0.5	11.5
Business, Management and Administration	11.1	14.5	11.4	6.8
Education and Training	3.0	6.2	33.5	7.3
Finance	2.4	2.0	0.0	0.5
Government and Public Administration	0.2	0.3	0.5	5.6
Health Science	28.9	9.5	22.5	22.8
Hospitality and Tourism	3.4	13.1	0.0	2.7
Human Service	3.2	6.3	7.8	8.5
Information Technology	9.3	0.9	4.4	3.6
Law, Public Safety, Corrections and Security	1.0	1.6	5.1	9.0
Manufacturing	3.1	6.1	7.7	2.6
Marketing, Sales and Service	13.2	17.5	0.0	0.4
Science, Technology, Engineering and Mathematics	4.0	1.1	3.7	7.3
Transportation, Distribution, and Logistics	10.4	7.6	0.0	4.1

Source: BLS, SCDEW, WI, SC Department of Education, OES, HWOL

A few observations about the comparison that could be considered challenges to the workforce pipeline include:

- There is an overabundance of graduates in Education and Training; Human Service; Law, Public Safety, Corrections and Security; and Manufacturing that is outpacing the short-term demand.
- There is more short-term employment demand than area graduates in Health Science; Information Technology; Transportation, Distribution, and Logistics; and Marketing, Sales and Service.
- The area is projected to produce a higher percent of students in Arts, Audio/Video Technology and Communications; Government and Public Administration; Health Science; Law, Public Safety, Corrections and Security; and Science, Technology, Engineering and Mathematics than there will be Santee-Lynches jobs long-term.
- There is projected to be a higher employment demand long-term in the Business, Management and Administration; Hospitality and Tourism; and Marketing, Sales and Service clusters than there will be area graduates to meet it.

There is always a demand for employees with soft skills. It is said that hard skills (training, degrees, or certification) get you hired, but soft skills get you fired. Many of our residents need to learn or get a refresher in soft skills in order to KEEP their jobs. Employers see the need.

Top 10 Soft Skills Found in Online Ads for South Carolina (April 2013)

1. Oral and written communication skills
2. Customer Service Oriented
3. Problem solving
4. Detail oriented
5. Microsoft Office
6. Self-starting / Self-motivated
7. Organizational skills
8. Troubleshooting
9. Work independently
10. Sales experience

Source: The Conference Board Help Wanted OnLine ® Data Series (HWOL)

CONCLUSION

The Santee-Lynches LWIA area overall encompasses an economy dependent on Health Care, Manufacturing, and Retail Trade. The population is slowly increasing, and the education level for the population is lower than the state as a whole at the high end with lower percentages of residents with an associate's degree or higher. The workforce (current and potential) does face challenges in having the proper mix of employer demand being met by trained applicants. The majority of employers are advertising for jobs in health science; business, management, and administration; or marketing and sales. However, some supply flows could be fine-tuned to be more in line with demand.

The data shows that:

- There is an undersupply of today's area students choosing the fields of Business, Management and Administration; Hospitality and Tourism; and Marketing, Sales and Service to meet Santee-Lynches LWIA's future demand.
- There is an oversupply of today's students choosing the areas of Arts, Audio/Video Technology and Communication; Government and Public Administration; Law, Public Safety, Corrections and Security; Science, Technology, Engineering and Mathematics; and Health Science that will far outpace the area's long-term demand.
- Comprehensive soft skills training is needed for all students and job seekers (high school, post-secondary, adult, new and returning entrants to the labor force, and incumbent workers) so that they can not only get hired but retain their positions and thus reduce employee turnover.

Getting education in line with the demands of employers will help the Santee-Lynches LWIA meet the challenges it faces.

TRIDENT LWIA WORKFORCE REPORT 2012



The *Trident Workforce Report* is published by the Labor Market Information (LMI) Department of the South Carolina Department of Employment and Workforce. The information and analyses provided in this publication are based on data collected from sources throughout South Carolina and the United States.

About SC DEW and LMI:

The Labor Market Information Department compiles and publishes employment statistics, job forecasts, wage data, demographics, and other labor market information to help public and private organizations, researchers, and others better understand today's complex workforce.

The LMI Department produced this report under the leadership of:

Executive Director - Cheryl Stanton
Interim Deputy Assistant Executive Director - Kerry Paul
Labor Market Information Director - Brenda Lisbon

South Carolina Department of Employment and Workforce
1550 Gadsden Street
Columbia, South Carolina 29201
(803) 737-2660
www.dew.sc.gov
www.scworkforceinfo.com



TABLE OF CONTENTS

EXECUTIVE SUMMARY	VI
INTRODUCTION	VII
ECONOMIC DISCUSSION: A CURRENT PICTURE OF THE WORKFORCE	1
EMPLOYMENT BY INDUSTRY	1
LOCATION QUOTIENT	1
AVERAGE ANNUAL WAGE BY INDUSTRY	2
OCCUPATIONAL EMPLOYMENT	3
SKILLS DATA.....	4
EMPLOYMENT AND UNEMPLOYMENT	6
NEW STARTUP FIRMS	8
EMPLOYERS BY SIZE OF ESTABLISHMENT	9
SUPPLY: WHAT'S OUT THERE?	10
POPULATION BY AGE	10
POPULATION CHANGE AND MIGRATION	11
COMMUTING PATTERNS	12
EDUCATIONAL ATTAINMENT	12
CAREER CLUSTERS SELECTED BY HIGH SCHOOL STUDENTS	13
DEGREES AWARDED	15
CHARACTERISTICS OF UI CLAIMS BY OCCUPATION	16
UNEMPLOYMENT INSURANCE CLAIMANT CHARACTERISTICS.....	17
DEMAND: WHAT DO WE NEED?	20
ONLINE JOB ADVERTISEMENTS.....	20
INDUSTRY PROJECTIONS	21
OCCUPATIONAL PROJECTIONS	21
SKILLS OF PROJECTED OCCUPATIONS	24
WORKFORCE CHALLENGES	25
CONCLUSION	27

TABLE OF FIGURES

FIGURE 1: TRIDENT LWIA EMPLOYMENT BY INDUSTRY - 3RD QUARTER 2012	1
FIGURE 2: NOTABLE TRIDENT LWIA LOCATION QUOTIENTS - 2011	2
FIGURE 3: ANNUAL AVERAGE WAGE BY INDUSTRY - 3RD QUARTER 2012.....	3
FIGURE 4: TOP 20 OCCUPATIONS WITH WAGES - 2012.....	4
FIGURE 5: TOP OCCUPATIONS BY SKILL CLASSIFICATION - TRIDENT 2012	5
FIGURE 6: EMPLOYMENT - 2002-2012.....	6
FIGURE 7: UNEMPLOYMENT - 2002-2012	7
FIGURE 8: ANNUAL UNEMPLOYMENT - 2002-2012	8
FIGURE 9: MONTHLY UNEMPLOYMENT RATE - MARCH 2011-APRIL 2013.....	8
FIGURE 10: NEW STARTUP FIRMS - 2007-2012.....	9
FIGURE 11: EMPLOYERS BY SIZE OF ESTABLISHMENT - 3RD QUARTER 2012.....	9
FIGURE 12: POPULATION BY AGE	10
FIGURE 13: POPULATION PROJECTIONS TO 2030.....	11
FIGURE 14: POPULATION MIGRATION - 2011 - 5-YEAR ESTIMATE.....	11
FIGURE 15: COMMUTING PATTERNS - 2010.....	12
FIGURE 16: EDUCATIONAL ATTAINMENT - TRIDENT AND SOUTH CAROLINA 2011.....	12
FIGURE 17: EDUCATIONAL ATTAINMENT - TRIDENT 2011	13
FIGURE 18: PERCENT OF STUDENTS DECLARING A CAREER CLUSTERS IN TRIDENT AND SC - 2012	14
FIGURE 19: CAREER CLUSTERS - 2012.....	15
FIGURE 20: TOP 20 MAJORS IN TRIDENT - 2011	16
FIGURE 21: CHARACTERISTICS OF UI CLAIMS BY OCCUPATION - APRIL 2013.....	17
FIGURE 22: UI CLAIMANT CHARACTERISTICS - APRIL 2013.....	18
FIGURE 23: TRIDENT HWOL - APRIL 2013 BY MAJOR GROUP	20
FIGURE 24: INDUSTRY PROJECTIONS - 2008-2018	21
FIGURE 25: GROWING OCCUPATIONS - 2008-2018.....	22
FIGURE 26: EDUCATION FOR TOP 50 PROJECTED OCCUPATIONS	23
FIGURE 27: TOP 20 PROJECTED DECLINING OCCUPATIONS IN TRIDENT - 2008-2018.....	24
FIGURE 28: SKILL LEVELS.....	24
FIGURE 29: COMPARISON OF SUPPLY AND DEMAND.....	25

EXECUTIVE SUMMARY

The employment leaders for Trident Local Workforce Investment Area (LWIA) are Retail Trade and Healthcare and Social Assistance. Employment growth is anticipated by 2018 in several industries, especially Health Care and Social Assistance and Manufacturing. The highest wages are paid by the Management of Companies and Enterprises and Manufacturing industries.

The LWIA's population grew by 18 percent from 2000 to 2010, and it has more residents aged 20 to 39 and fewer residents aged 70 and older than the state's average.

Employment is rising, and unemployment is declining. The LWIA has a historically lower unemployment rate than the state and maintained that advantage during and after the recession. Employment is concentrated in Charleston, and over 4,000 more people enter the LWIA for work than leave it every day. Administrative and Support and Waste Management and Remediation Services is the largest industry represented in unemployment claims. This industry includes office administrative services; facilities support services; employment services; services to buildings and dwellings; and waste collection, treatment, and disposal services.

Trident has a higher proportion of residents with more than a high school education than the state does as a whole. For projected growing jobs, 4 percent require no diploma, 32 percent require a diploma or GED, 30 percent require an associate's degree or training, and 34 percent require a bachelor's degree or higher.

Trident LWIA businesses desire a trained workforce with the future focus being on healthcare, manufacturing, and professional services. Technology has become part of most occupations, requiring continuous training and skill-upgrading. A challenge for the LWIA is to match the skill levels of the workforce with open positions. There may be a mismatch between the employer's skill demands and the occupations that the worker will accept.

Trident LWIA has several factors working in its favor. It has a growing population and several educational institutions available to strengthen the workforce. For 2012, The Citadel was named the top public institution in the South by U.S. News and World Report for a second consecutive year; its Master of Business Administration program was named one of the best in the nation by the Princeton Review. When it comes to tourism, Charleston was listed as the top city in the United States and destination city in the world by Condé Nast's 2012 Readers' Choice Awards. Google has invested an additional \$600 million in its Berkeley County facility. The Manufacturing sector is a growing employment force and has a high job multiplier. Workers are becoming smarter and are gaining skills; the LWIA is transitioning well from low to middle skilled jobs. The future looks bright for the Trident LWIA.

The patterns and trends described in this report offer cause for both optimism and concern. Trident LWIA has an exciting future ahead of it, and it can lead the way in delivering the skilled talent and economic opportunities that businesses and workers in the area deserve.

INTRODUCTION

The Trident Local Workforce Investment Area is composed of Berkeley, Charleston, and Dorchester counties and is located in the southeastern part of the state. The area is characterized by its rich history and coastline. The historical economy included the agriculture, hospitality, transportation, and trade industries.

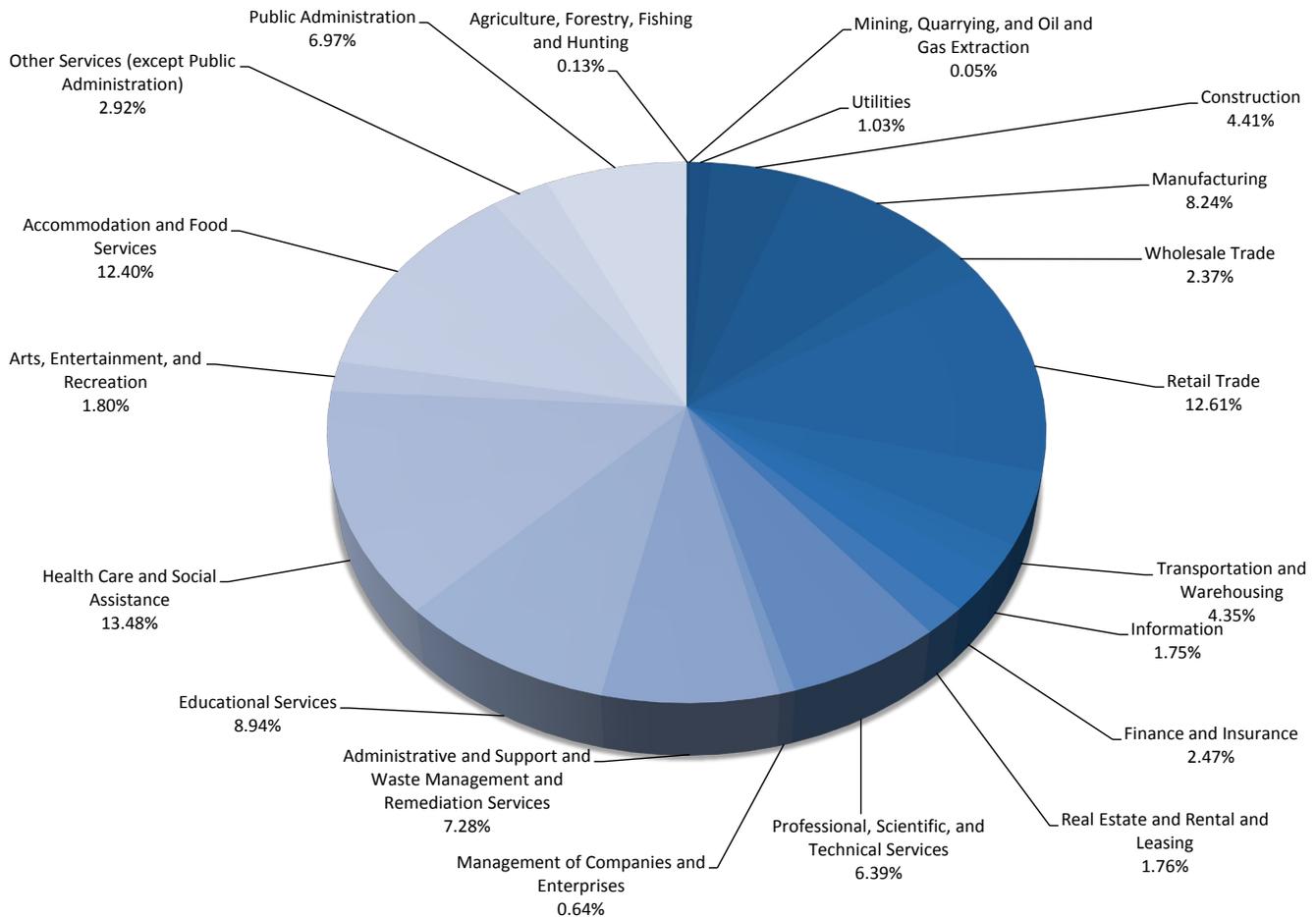
The economic changes this year in the Trident LWIA demonstrate the shifting needs of employers and employees. Cultivating an understanding of the workforce allows all three counties to respond to anticipated future needs. Analyses help to identify the gap between what the workforce has in the way of talent and skills (supply) and what it may need in the future (demand).

The purpose of the Trident LWIA Workforce Report is to present a comprehensive view of the status of Trident counties' economy and workforce. The report includes an analysis of Trident LWIA's workforce, industries, economic climate, and factors that will affect all three. Forecasts will be made for the workforce, industries, and the economy.

ECONOMIC DISCUSSION: A CURRENT PICTURE OF THE WORKFORCE

EMPLOYMENT BY INDUSTRY

Figure 1: Trident LWIA Employment By Industry - 3rd Quarter 2012



Source: Bureau of Labor Statistics (BLS), SC Department of Employment & Workforce (SCDEW), Quarterly Census of Employment and Wages (QCEW)

The Healthcare and Social Assistance and Retail Trade are the top two industries employing workers in the Trident LWIA. Industries, like Educational Services and Manufacturing, are healthy and flourishing, while others, like Construction, are still recovering from the recession. The 2010 per capita income for a Trident LWIA resident was \$36,127, which was an increase of 39.7 percent from 2000.¹ Economic growth has taken place in the past decade to enhance the LWIA's workers, although the area is still recovering from a tough business cycle.

LOCATION QUOTIENT

A location quotient (LQ) is a useful tool for determining the concentration of workers in a given area. Location quotients compare the regional share of employment in a particular industry to the national share of employment in the same industry. The resulting quotient reveals the degree of regional specialization or concentration in an industry and provides insight into what makes the area unique in comparison to the national average. An LQ of 1.0 means the concentration of jobs in that industry matches the nation's value. Location quotients higher than 1.0 indicate the level of specialization the area has in particular sectors. Lower quotients can indicate a possible area that could be expanded.

1 US Bureau of Economic Analysis

Figure 2: Notable Trident LWIA Location Quotients - 2011

Industry and Sectors	Location Quotient
<i>Berkeley County</i>	
Primary Metal Manufacturing	19.5
Textile Mills	13.9
Chemical Manufacturing	4.1
<i>Charleston County</i>	
Scenic and Sightseeing Transportation	7.4
Support Activities for Transportation	3.9
Transportation Equipment	3.1
<i>Dorchester County</i>	
Transportation Equipment Manufacturing	6.6
Non-metallic Mineral Product Manufacturing	5.7
Forestry and Logging	4.5

Source: US Department of Labor, Bureau of Labor Statistics - http://data.bls.gov/location_quotient

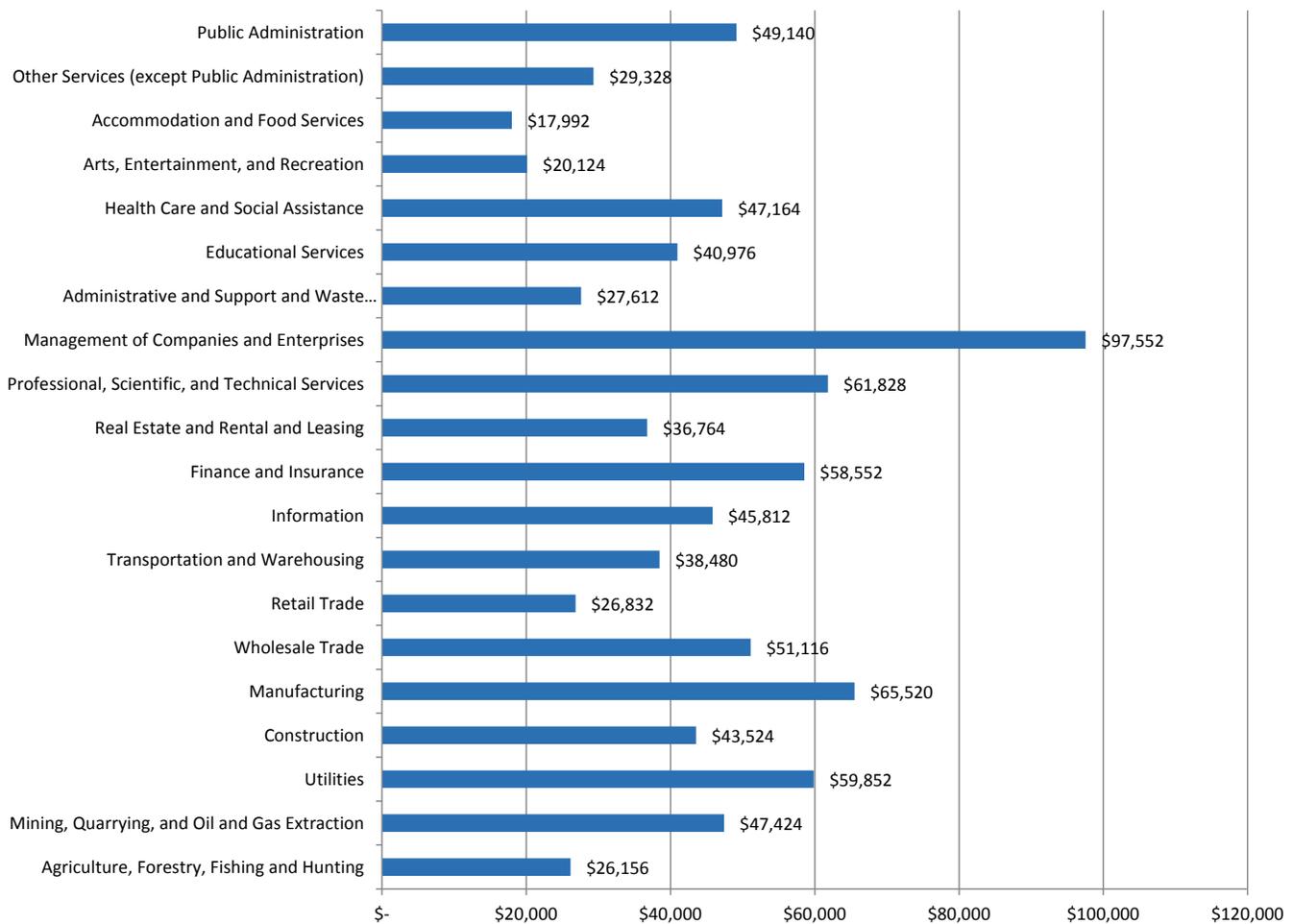
Textile Mills and Primary Metal Manufacturing top the most concentrated industries in this area with location quotients over 13. Textile Mill companies transform a basic fiber into a product like yarn or fabric and are a highly-focused sector in Berkeley County. Other manufacturing sectors located throughout the area include Chemical; Non-metallic Mineral Product; and Transportation Equipment.

AVERAGE ANNUAL WAGE BY INDUSTRY

The annual wages for the Management of Companies are the highest for any LWIA industry. These workers administer and oversee the planning and decision making of companies and manage the securities of establishments. Manufacturing workers are the second highest paid group of employees in the LWIA.

High wage industries like Professional, Scientific, and Technical Services and Finance and Insurance usually require at least a bachelor’s degree. Having an education is an excellent way to enter a high-wage industry and have more options for employment.

Figure 3: Annual Average Wage by Industry - 3rd Quarter 2012



Source: BLS, SCDEW, QCEW

OCCUPATIONAL EMPLOYMENT

When examining the current occupational employment in the area, one can observe that some of the top 20 occupations are low-skill, low-pay jobs. These jobs, like Cashiers, Waiters and Waitresses, and Food Preparers, have high turnover. These are not necessarily the most robust jobs as far as wages, but they are jobs.

Figure 4 lists occupations, such as Registered Nurses, Elementary School Teachers, and First-Line Supervisors, that pay a higher wage. With Accommodations and Food, Retail Trade, and Healthcare comprising nearly 39 percent of the employment in the Trident LWIA, positions including Cooks, Retail Salespersons, and Registered Nurses are, not surprisingly, reflected in the list of top occupations.

Figure 4: Top 20 Occupations with Wages - 2012

Occupational Title	Total Employment	Hourly Average Wage (\$)
All Occupations	291,750	19.80
Retail Salespersons	12,000	11.76
Registered Nurses	9,060	30.65
Cashiers	8,810	9.56
Combined Food Preparation and Serving Workers, Including Fast Food	7,750	8.67
Waiters and Waitresses	6,480	8.79
Laborers and Freight, Stock, and Material Movers, Hand	5,800	12.34
Customer Service Representatives	5,490	15.02
Office Clerks, General	5,000	12.81
Janitors and Cleaners, Except Maids and Housekeeping Cleaners	4,670	10.49
Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	4,440	15.05
First-Line Supervisors of Office and Administrative Support Workers	3,950	22.34
General and Operations Managers	3,700	53.32
Stock Clerks and Order Fillers	3,660	10.95
Team Assemblers	3,450	18.25
First-Line Supervisors of Retail Sales Workers	3,380	19.30
Maintenance and Repair Workers, General	3,310	17.09
Bookkeeping, Accounting, and Auditing Clerks	3,280	16.80
Elementary School Teachers, Except Special Education	3,200	23.40
Cooks, Restaurant	2,910	10.35
Heavy and Tractor-Trailer Truck Drivers	2,790	17.38

Source: BLS, SCDEW, Occupational Employment Statistics (OES)

SKILLS DATA

Employers are beginning to see that a person's skills, in addition to their education, may help in determining who to hire. Many times the degree is not as important as the skills gained through specialized training and/or experience. In order to be able to determine the current level of skills in the area, the top 50 current occupations by employment are presented, and assigned a low, middle, or high skill designation to that occupation. The definitions for those skills levels are:

- **LOW:** No high school or GED, or high school/GED with less than one year experience and no on-the-job-training (OJT), or short-term OJT
- **MIDDLE:** High school/GED with one year experience, or moderate OJT, or long-term OJT, or apprenticeship, or postsecondary vocational training, or some college, or Associate's Degree, or less than a Bachelor's Degree
- **HIGH:** Bachelor's Degree or higher

In the Trident area, 24 of the top 50 jobs in 2012 are considered low-skill jobs. Nineteen are middle skill, and seven are high-skill occupations.

Figure 5: Top Occupations By Skill Classification - Trident 2012

Skillset: LOW
Bartenders
Cashiers
Combined Food Preparation and Serving Workers, Including Fast Food
Construction Laborers
Cooks, Fast Food
Cooks, Restaurant
Customer Service Representatives
Driver/Sales Workers
Food Preparation Workers
Janitors and Cleaners, Except Maids and Housekeeping Cleaners
Laborers and Freight, Stock, and Material Movers, Hand
Landscaping and Groundskeeping Workers
Light Truck or Delivery Services Drivers
Maids and Housekeeping Cleaners
Office Clerks, General
Personal Care Aides
Receptionists and Information Clerks
Retail Salespersons
Secretaries and Administrative Assistants, Except Legal, Medical, and Executive
Security Guards
Shipping, Receiving, and Traffic Clerks
Stock Clerks and Order Fillers
Teacher Assistants
Waiters and Waitresses
Skillset: MIDDLE
Automotive Service Technicians and Mechanics
Bill and Account Collectors
Bookkeeping, Accounting, and Auditing Clerks
Carpenters
First-Line Supervisors of Construction Trades and Extraction Workers
First-Line Supervisors of Food Preparation and Serving Workers
First-Line Supervisors of Office and Administrative Support Workers
First-Line Supervisors of Production and Operating Workers
First-Line Supervisors of Retail Sales Workers
General and Operations Managers
Heavy and Tractor-Trailer Truck Drivers
Licensed Practical and Licensed Vocational Nurses
Maintenance and Repair Workers, General
Medical Assistants
Nursing Assistants
Police and Sheriff's Patrol Officers
Registered Nurses
Sales Representatives, Wholesale and Manufacturing, Except Technical and Scientific Products
Team Assemblers
Skillset: HIGH
Accountants and Auditors
Civil Engineers
Elementary School Teachers, Except Special Education
Management Analysts
Medical and Clinical Laboratory Technologists
Middle School Teachers, Except Special and Career/Technical Education
Secondary School Teachers, Except Special and Career/Technical Education

Source: BLS, SCDEW, OES, Workforce Intelligence (WI)

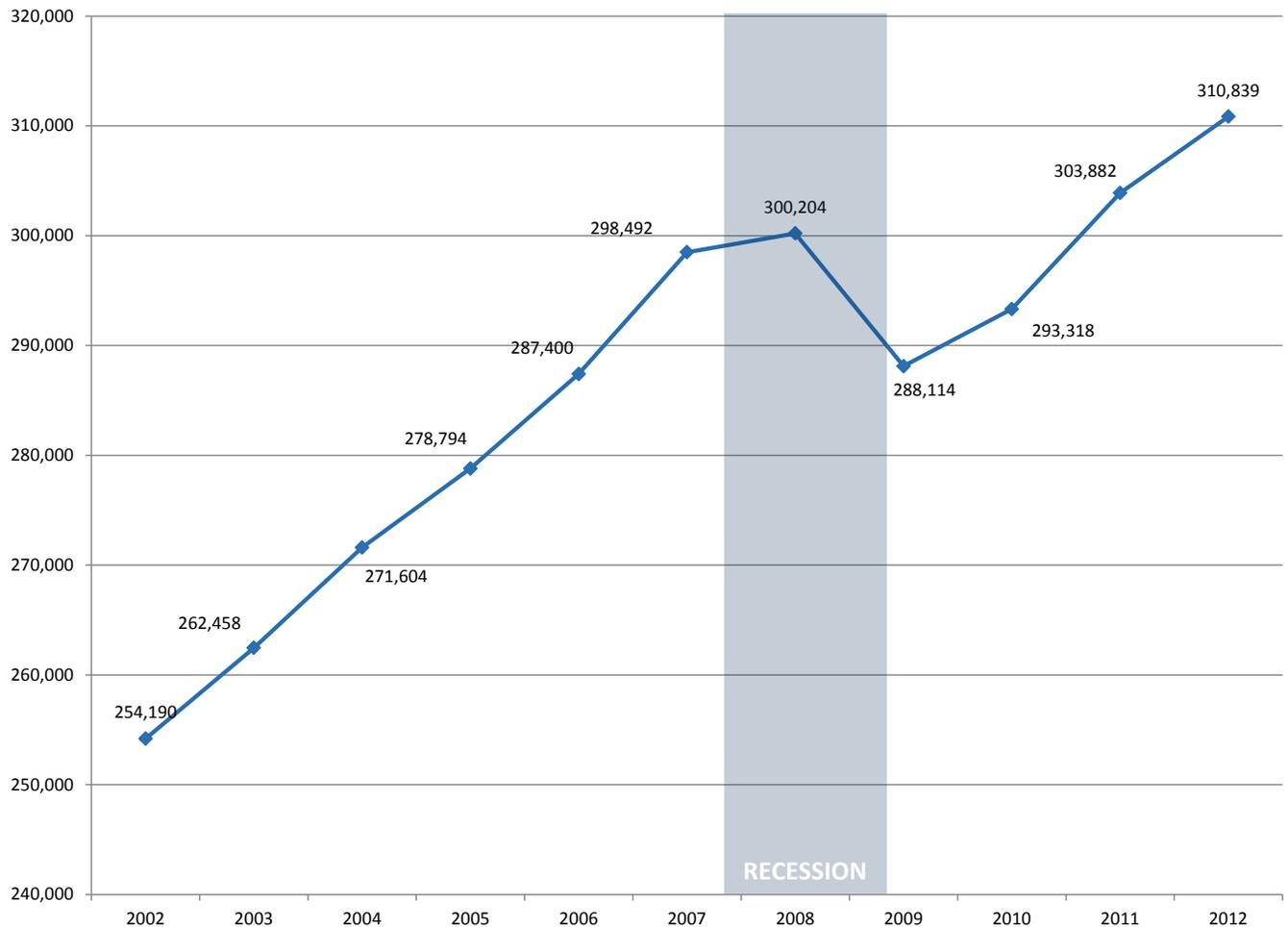
EMPLOYMENT AND UNEMPLOYMENT

A crucial indicator of the health of a workforce is its labor force levels. Labor force data count residents who are employed and unemployed. There are a few Federal definitions that will make discussion of the labor force a little easier to understand.

- Employed: Persons 16 years old or older who worked for pay any time during the week that includes the 12th of the month
- Unemployed: Persons 16 years old or older who are not working but want a job, and are able and willing to work
- Labor Force: Employed plus unemployed
- Unemployment Rate: Unemployment divided by labor force

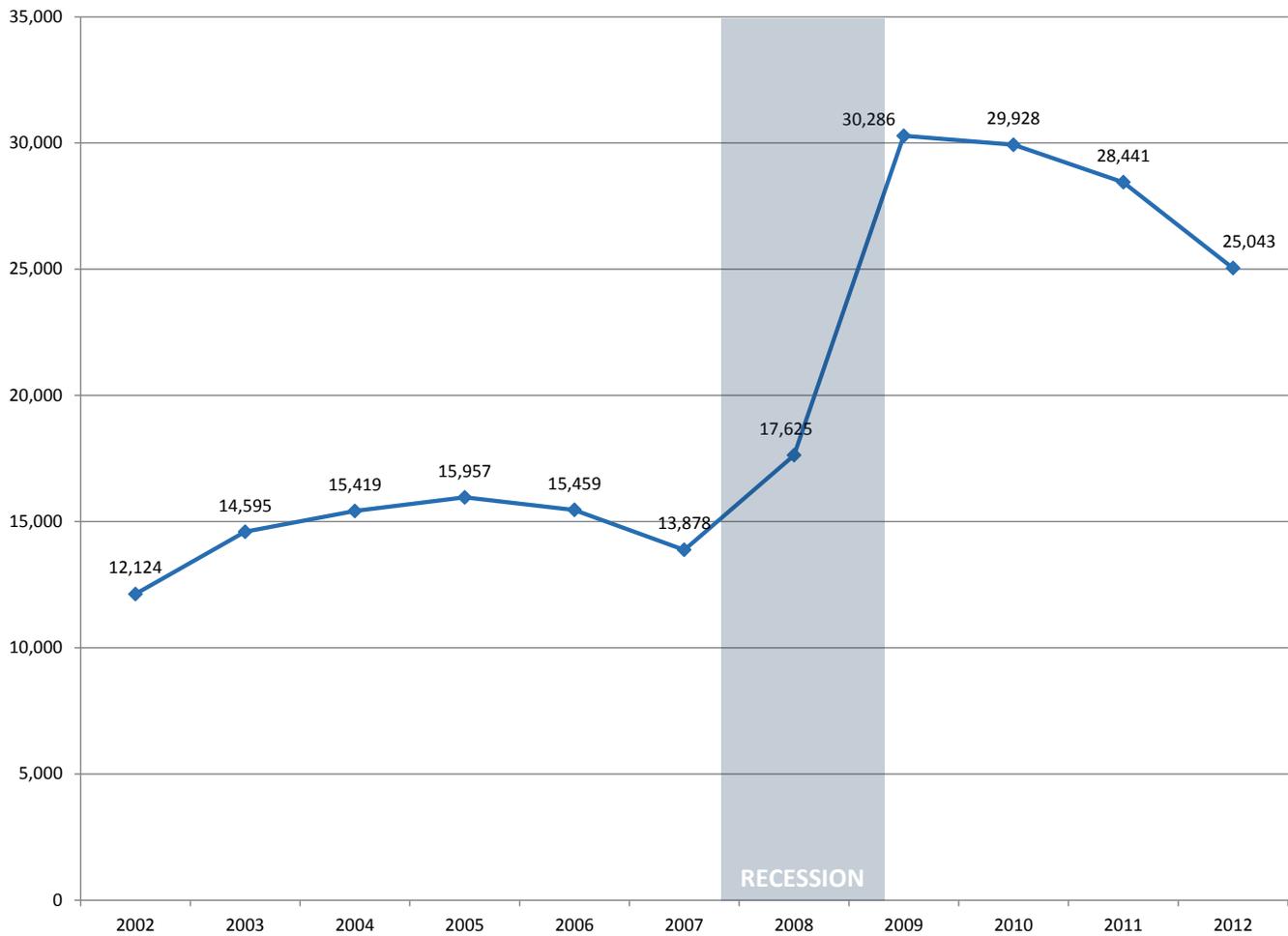
In Figure 6, the recession (officially from December 2007 through June 2009) had a great effect on the labor force. Employment dropped, and unemployment increased by 118 percent.

Figure 6: Employment - 2002-2012



Source: BLS, SCDEW, Local Area Unemployment Statistics (LAUS)

Figure 7: Unemployment - 2002-2012

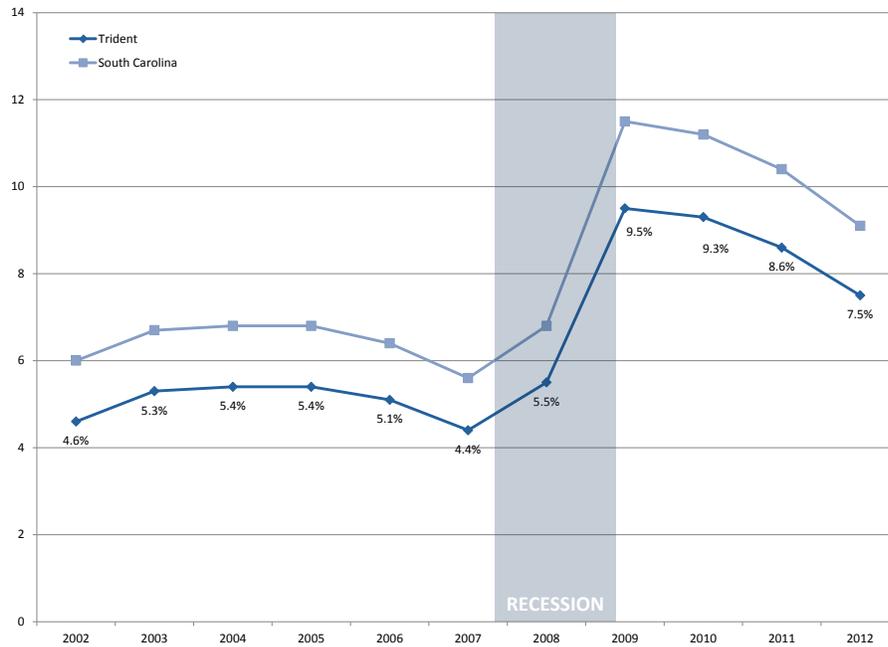


Source: BLS, SCDEW, LAUS

Tracking annual unemployment rates give a good snapshot of the state of an area's workforce. Annual rates smooth out the usual ups and downs of a month-to-month rate (due to normal seasonal or cyclical changes) to give a more accurate picture.

Figure 8 shows the annual rates for the Trident LWIA area and South Carolina. Trident has historically been consistently below the state's rate and remained so during and after the recession. During the recession though, the Trident rate more than doubled from 4.4 percent in 2007 to 9.5 percent in 2009.

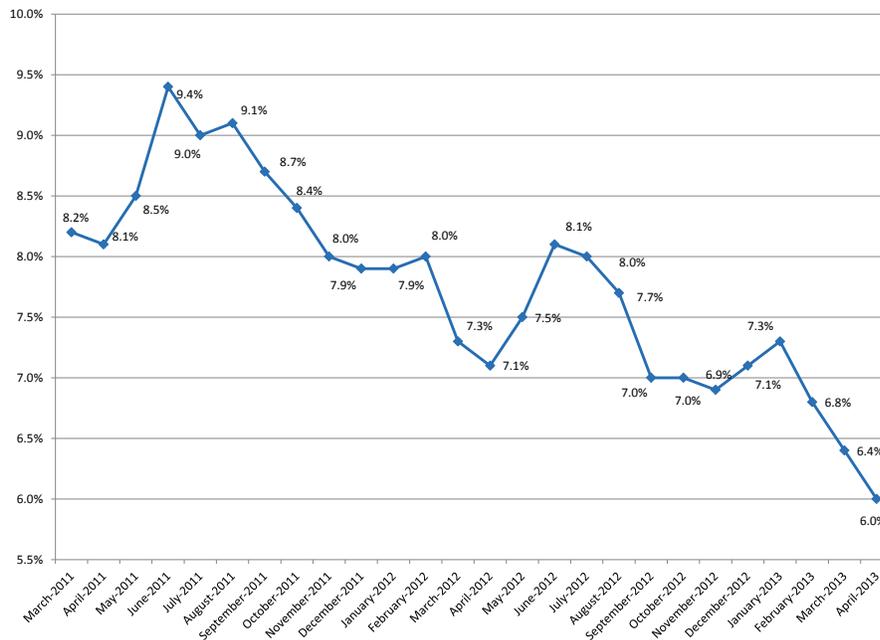
Figure 8: Annual Unemployment - 2002-2012



Source: BLS, SCDEW, LAUS

Figure 9 illustrates that the monthly unemployment rate has seen wide fluctuations since March 2011. The area seems to be steadily recovering from the recession.

Figure 9: Monthly Unemployment Rate - March 2011-April 2013



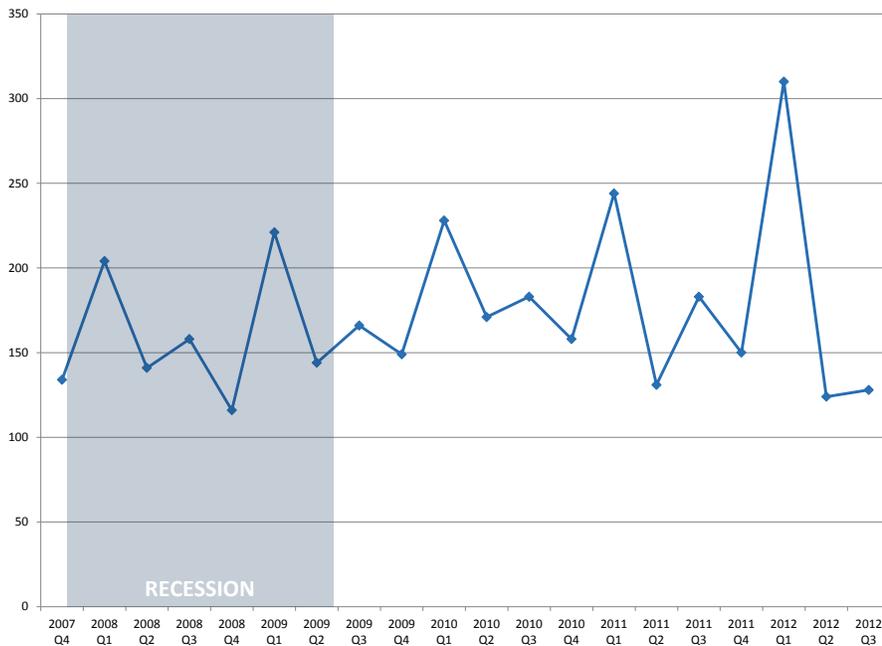
Source: BLS, SCDEW, LAUS

NEW STARTUP FIRMS

One way to see if an economy is improving is to examine data about startup firms. An increase in new companies might be an indicator of expansion in the area, whereas a drop in new firms shows a lack of confidence in the future. (Note: There is almost always a spike in startups in the first quar-

ter of the year.) Again, the recession had a major impact on normal business birth and death rates. Startups have been steady in the area with a large increase in early 2012.

Figure 10: New Startup Firms - 2007-2012



Source: BLS, SCDEW, QCEW

EMPLOYERS BY SIZE OF ESTABLISHMENT

By far, the largest category of business size in the area is small business. Small businesses (or establishments) are defined in South Carolina as companies employing 49 or fewer people. The Trident LWIA has 94 percent of establishments designated as small businesses, and South Carolina as a whole has 93 percent.

Small businesses may need more support and assistance than larger companies because they may not have a designated human resources department or person. They may rely on other resources, such as SC Works Centers, for help with hiring, training, or screening job candidates.

Figure 11: Employers by Size of Establishment - 3rd Quarter 2012

Employees	Trident	South Carolina
0 to 4	8,715	63,766
5 to 9	2,943	19,667
10 to 19	2,070	13,316
20 to 49	1,548	9,881
50 to 99	557	3,907
100 to 249	307	2,433
250 to 499	72	757
500 to 999	25	328
1000 +	21	264

Source: BLS, SCDEW, QCEW

SUPPLY: WHAT'S OUT THERE?

A manufacturing assembly line needs to have resources and supplies on-hand so that the line does not have to stop. The same is true for the workforce. The supply of workers needs to be of the right quantity and quality to do the job. Is the supply of workers in line with what the companies in the Trident LWIA need? Seven streams of workforce supply provide an indication: population, commuting, education of the population, clusters of high school students, awards earned at higher education institutions, and characteristics of unemployment insurance claims and claimants.

POPULATION BY AGE

Age distribution in the area is similar to the state and the country with two exceptions. In the 20-39 age cohorts, Trident has a notably higher proportion of population, and in the 70+ age cohorts, the LWIA has a markedly lower proportion of population.

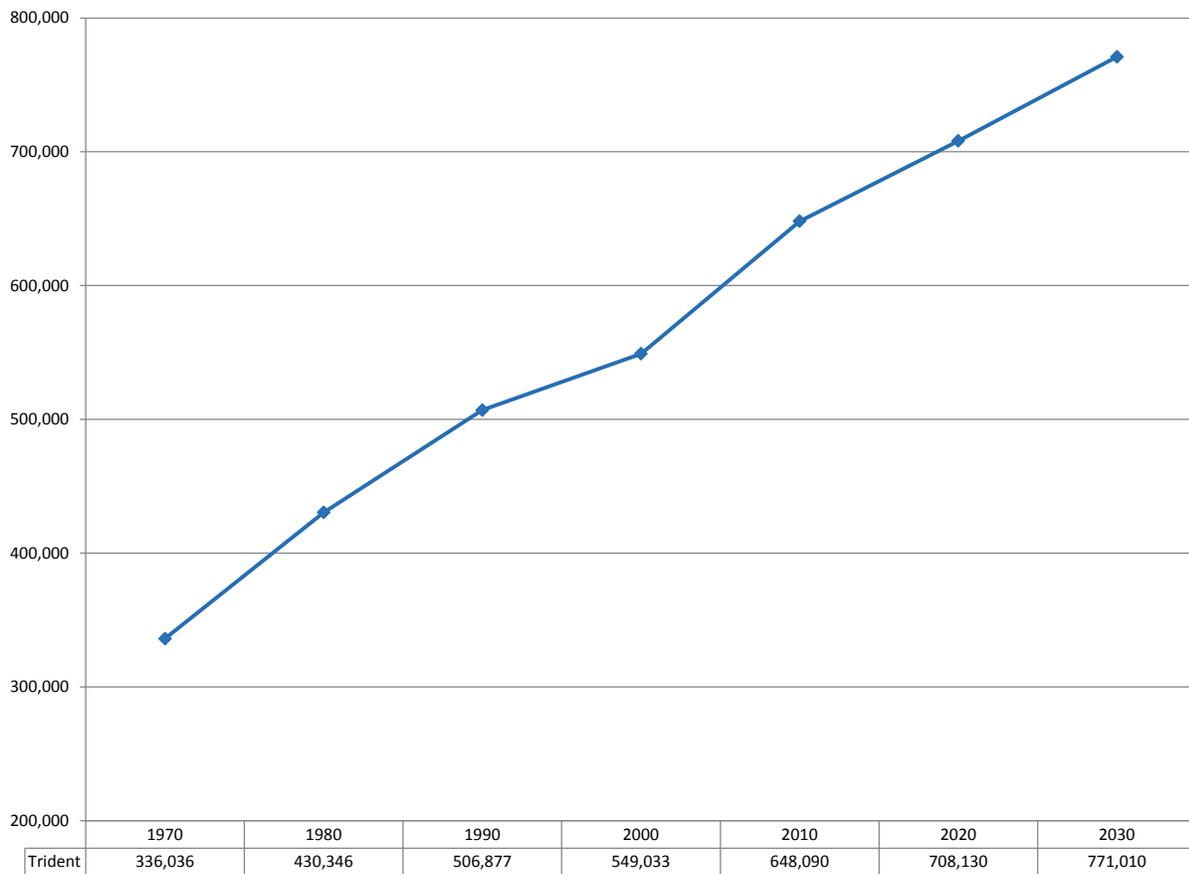
Figure 12: Population by Age

Age Range	Trident	SC	US
0-4	6.9%	6.5%	6.6%
5-9	6.4%	6.4%	6.6%
10-14	6.2%	6.5%	6.7%
15-19	7.0%	7.2%	7.2%
20-24	8.0%	7.2%	7.0%
25-29	8.1%	6.6%	6.8%
30-34	6.9%	6.2%	6.4%
35-39	6.9%	6.5%	6.6%
40-44	6.7%	6.8%	7.0%
45-49	7.2%	7.2%	7.4%
50-54	6.9%	7.0%	7.2%
55-59	6.1%	6.5%	6.3%
60-64	5.5%	5.9%	5.3%
65-69	3.9%	4.5%	3.9%
70-74	2.8%	3.3%	3.0%
75-79	2.0%	2.5%	2.4%
80-84	1.4%	1.7%	1.9%
85 and older	1.3%	1.5%	1.7%

Source: US Bureau of Census, American Community Survey (ACS)

POPULATION CHANGE AND MIGRATION

Figure 13: Population Projections to 2030



Source: US Census Bureau, Census 2000, SC Department of Health and Environmental Control - Vital Records Department. Population projections calculated by SC Budget and Control Board, Office of Research and Statistics

After a large jump in population from 1980 to 1990 (up 17.8 percent), the growth of the population of this area slowed down, growing just 8.3 percent over the next 10 years. Growth accelerated by 18 percent over the ten years to 2010. Growth is projected to increase less than 1 percent per year to 2030.

Figure 14: Population Migration - 2011 - 5-Year Estimate

	Total	Moved From Different State	Moved From Abroad	Moved From Different County	Moved Within Same County
Population 1 year and over	647,207	4.6%	0.5%	4.1%	8.4%
Hispanic or Latino origin (of any race)	32,771	7.2%	3.3%	2.8%	10.5%
White alone, not Hispanic or Latino	411,090	5.3%	0.3%	4.0%	7.7%
Population 25 Years and Over					
Less than high school graduate	53,315	2.1%	0.9%	4.2%	7.9%
High school graduate/GED	118,169	2.9%	0.3%	3.4%	7.0%
Some college or associate's degree	128,318	3.4%	0.3%	3.4%	6.9%
Bachelor's degree	84,413	5.6%	0.6%	3.1%	7.8%
Graduate or professional degree	45,546	5.1%	0.5%	1.8%	5.2%

Source: US Census Bureau, ACS, SCDEW

In-migration (people moving into Trident) shows that just fewer than 6 percent of residents with a

graduate degree came from out of state or out of the country. While over 5 percent each of Hispanics and Whites moved into Trident from another state, 3.3 percent of Hispanics came from abroad. Though 18 percent of residents moved, 5.1 percent came from outside of South Carolina.

COMMUTING PATTERNS

Nearly all of the workers (92 percent) of Trident live and work in the LWIA. The tables in Figure 15 show that over 14,000 workers commute in from other areas to work in the LWIA. Colleton County draws a notable portion of Trident County's residents out of the area to work. Over 4,200 more employees commute into the area than leave it to work.

Figure 15: Commuting Patterns - 2010

To Trident WIA From	14,463	From Trident WIA To	10,223
Colleton County, SC	3,489	Colleton County, SC	1,156
Orangeburg County, SC	2,066	Orangeburg County, SC	935
Georgetown County, SC	588	Richland County, SC	673
Williamsburg County, SC	474	Georgetown County, SC	333
		Beaufort County, SC	313

Source: US Census Bureau, ACS

EDUCATIONAL ATTAINMENT

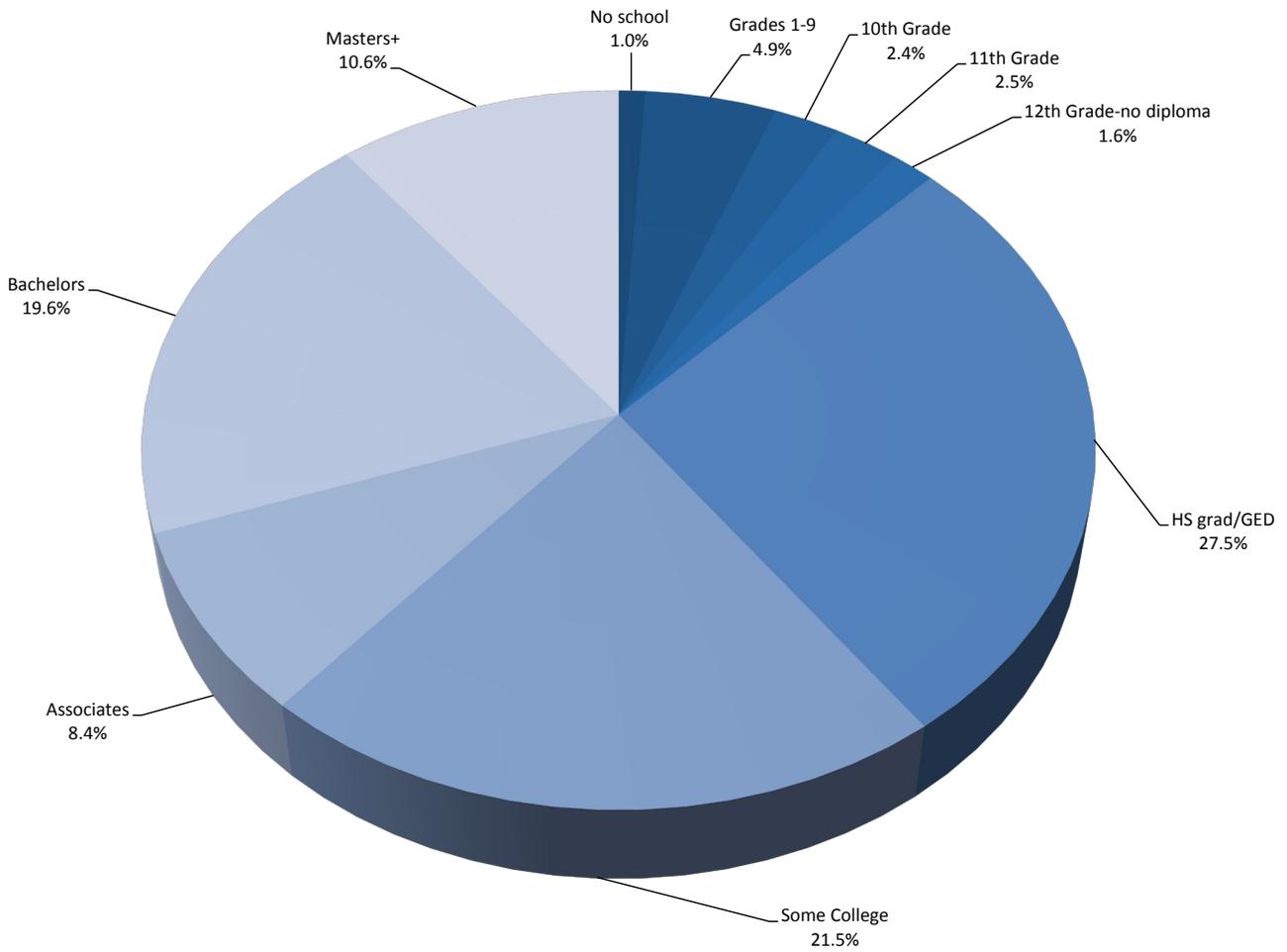
The Trident LWIA is fortunate in that the LWIA has a lower concentration of residents with a high school diploma or GED or less than the state as a whole. The Trident LWIA also has a higher percent of residents with more than a high school diploma or GED than the state does.

Figure 16: Educational Attainment - Trident and South Carolina 2011

Education Level	Trident	SC
No school	1.0	1.1
Grades 1-9	4.9	7.0
10th Grade	2.4	3.3
11th Grade	2.5	3.2
12th Grade-no diploma	1.6	1.8
HS grad/GED	27.5	30.9
Some College	21.5	20.1
Associates	8.4	8.4
Bachelors	19.6	15.6
Masters+	10.6	8.6

Source: US Census Bureau, ACS, SCDEW

Figure 17: Educational Attainment - Trident 2011

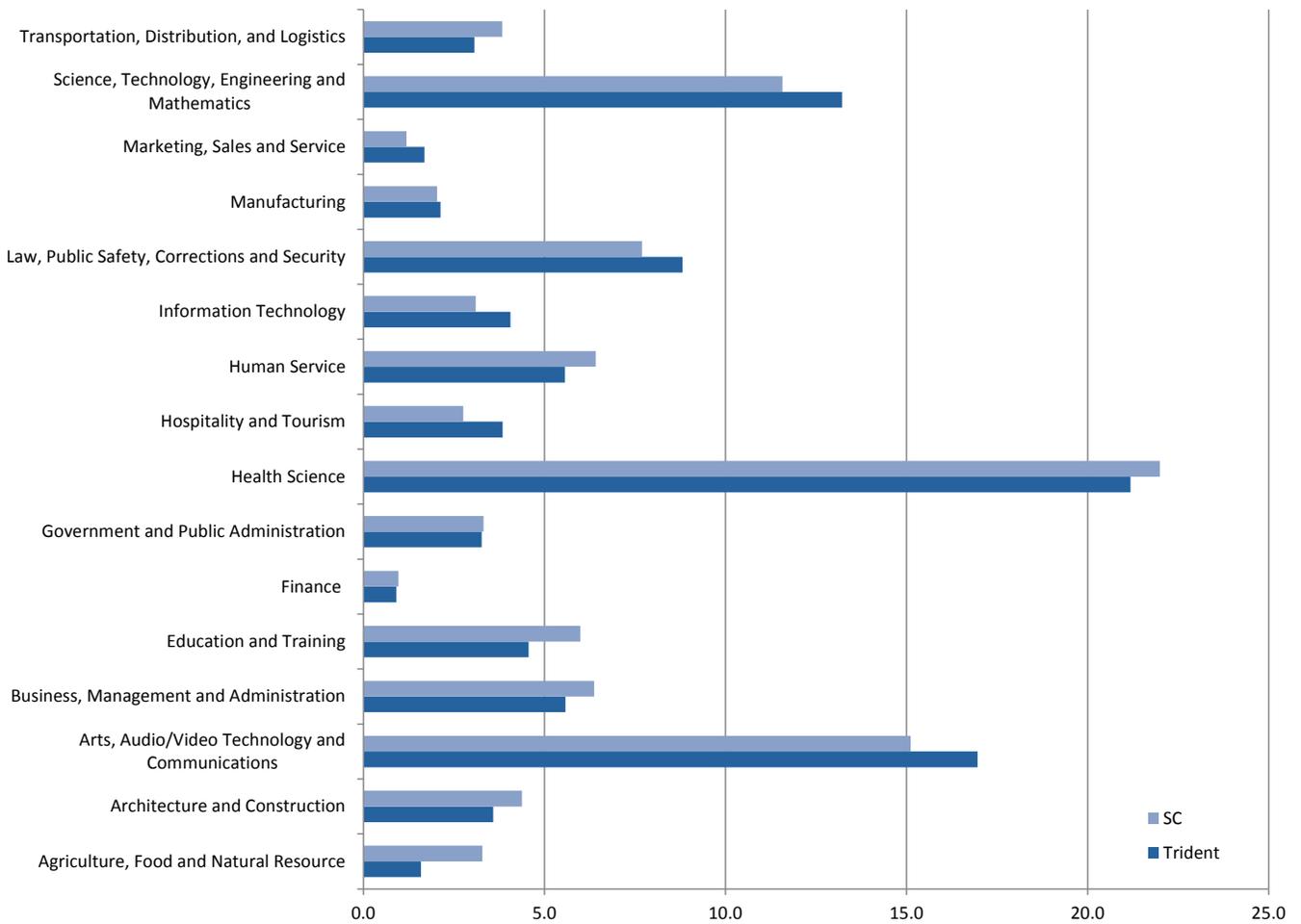


Source: US Census Bureau, ACS, SCDEW

CAREER CLUSTERS SELECTED BY HIGH SCHOOL STUDENTS

Eighth-grade students in South Carolina are required to choose a career cluster to concentrate on to lead them to a post-high school job or college major. There are 16 career clusters.

Figure 18: Percent of Students Declaring a Career Clusters In Trident and SC - 2012



Note: Declared clusters for students declaring a specific cluster on their primary Electronic Individual Graduation Plan (e-IGP) for 2011-2012 year

Source: SC Department of Education

Many students in the Trident area have chosen the Health Science career cluster in response to news of a shortage of healthcare workers in South Carolina. In keeping with the state trend, the area's students also picked the Arts, Audio/Video Technology and Communications cluster and the Science, Technology, Engineering and Math (STEM) cluster in notable numbers.

Figure 19: Career Clusters - 2012

Cluster	Trident	SC
Agriculture, Food and Natural Resource	1.6	3.3
Architecture and Construction	3.6	4.4
Arts, Audio/Video Technology and Communications	17.0	15.1
Business, Management and Administration	5.6	6.4
Education and Training	4.6	6.0
Finance	0.9	1.0
Government and Public Administration	3.3	3.3
Health Science	21.2	22.0
Hospitality and Tourism	3.8	2.8
Human Service	5.6	6.4
Information Technology	4.1	3.1
Law, Public Safety, Corrections and Security	8.8	7.7
Manufacturing	2.1	2.0
Marketing, Sales and Service	1.7	1.2
Science, Technology, Engineering and Mathematics	13.2	11.6
Transportation, Distribution, and Logistics	3.1	3.8

Source: SC Department of Education

DEGREES AWARDED

In higher education, Trident area colleges and universities have conferred a wide variety of awards. Of the top 20, Business Administration and Management are the most popular followed by Liberal Arts. The institutions included in this data are Charleston Southern University, College of Charleston, the Medical University of South Carolina, The Citadel, and Trident Technical College.

Figure 20: Top 20 Majors in Trident - 2011

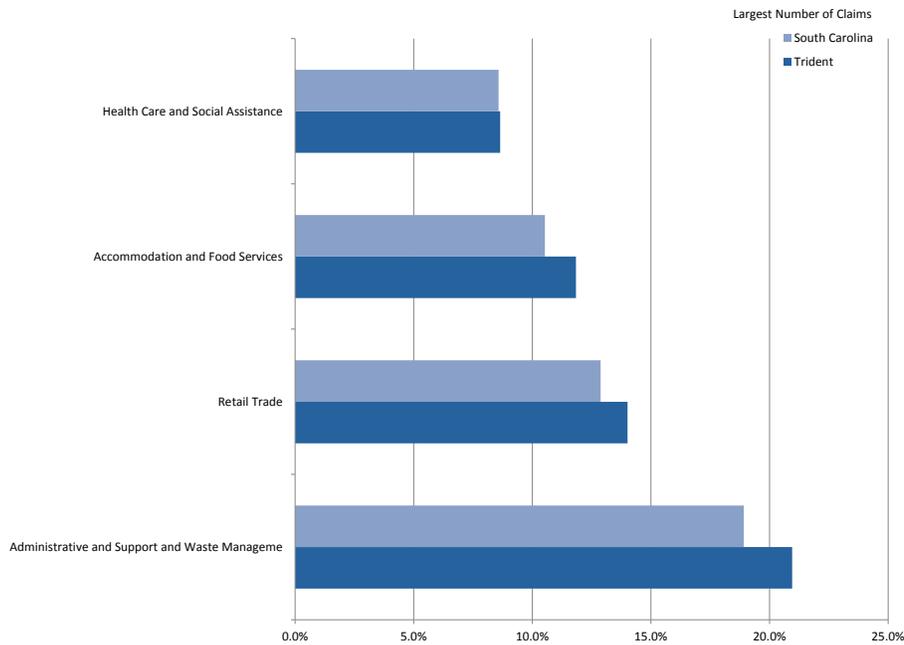
Majors	
Business Administration and Management, General	655
Liberal Arts and Sciences/Liberal Studies	368
Registered Nursing/Registered Nurse	272
Psychology, General	269
Biology/Biological Sciences, General	217
Speech Communication and Rhetoric	205
Political Science and Government, General	182
Medicine	163
Accounting	150
Social Work	150
Criminal Justice/Safety Studies	135
Physical Education Teaching and Coaching	119
English Language and Literature, General	116
History, General	112
Nursing - Registered Nurse Training, BSN Generic	112
Culinary Arts/Chef Training	86
Early Childhood Education and Teaching	84
Airframe Mechanics and Aircraft Maintenance Tech	81
Elementary Education and Teaching	80
Pharmacy	75

Source: SC Commission on Higher Education, http://www.che.sc.gov/New_Web/Data&Pubs.htm

CHARACTERISTICS OF UI CLAIMS BY OCCUPATION

Another source of supply for the workforce is people who are receiving unemployment compensation. In the Trident LWIA area, the highest number of claims are filed are in the Administrative and Support and Waste Management and Remediation Services group followed by Retail Trade. The Administrative and Waste sector includes office administrative services; facilities support services; employment services; services to buildings and dwellings; and waste collection, treatment, and disposal services. These industries highlight the diverse economy of the Trident LWIA with workers supporting a variety of facilities in the area and in the high turnover of the retail industry.

Figure 21: Characteristics of UI Claims by Occupation - April 2013



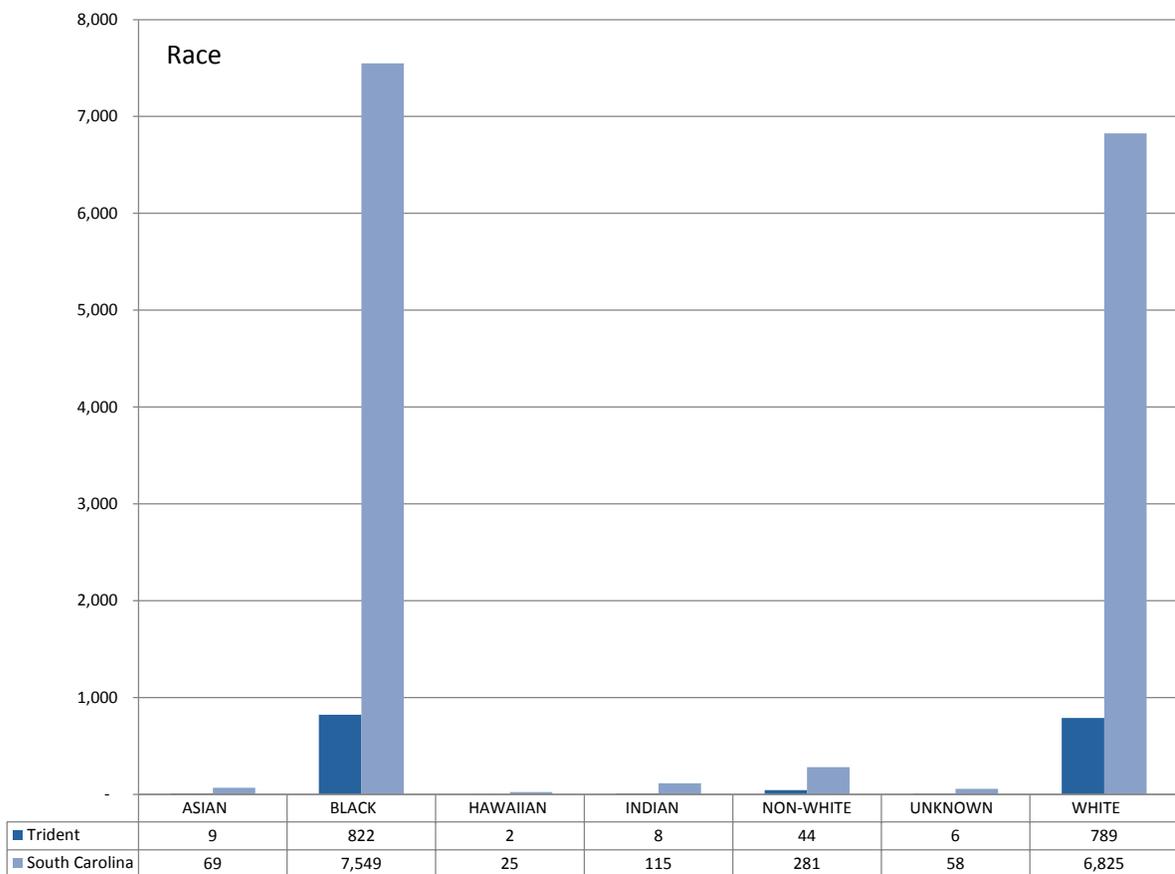
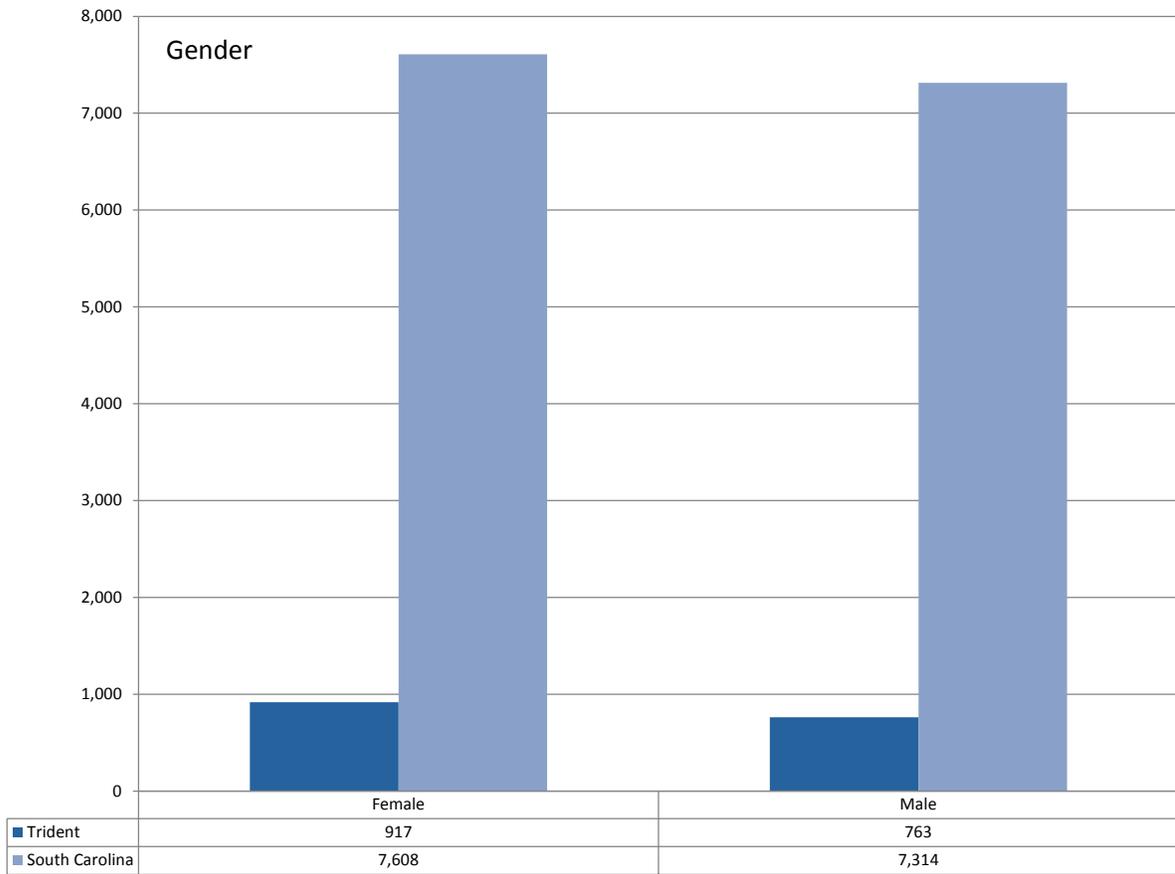
Occupation	Trident	South Carolina
Administrative and Support and Waste Management	308	2,373
Retail Trade	206	1,616
Accommodation and Food Services	174	1,321
Health Care and Social Assistance	127	1,076
Transportation and Warehousing	115	414
Professional, Scientific, and Technical Services	112	698
Construction	102	820
Manufacturing	72	2,267
Wholesale Trade	56	445
Other Services (except Public Administration)	41	292
Real Estate and Rental and Leasing	33	213
Educational Services	33	222
Finance and Insurance	28	300
Information	27	122
Public Administration	24	206
Arts, Entertainment, and Recreation	8	94
Management of Companies and Enterprises	2	35
Mining, Quarrying, and Oil and Gas Extraction	1	10
Utilities	1	22

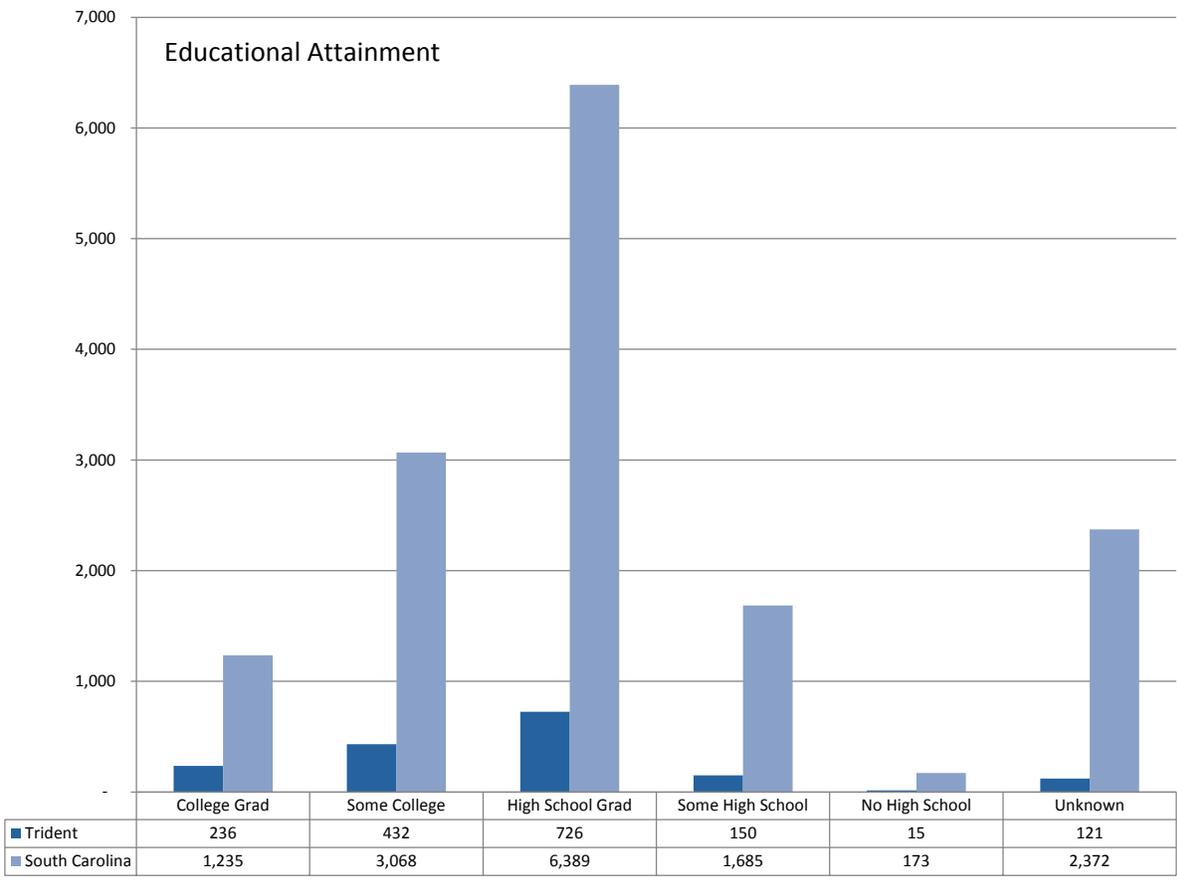
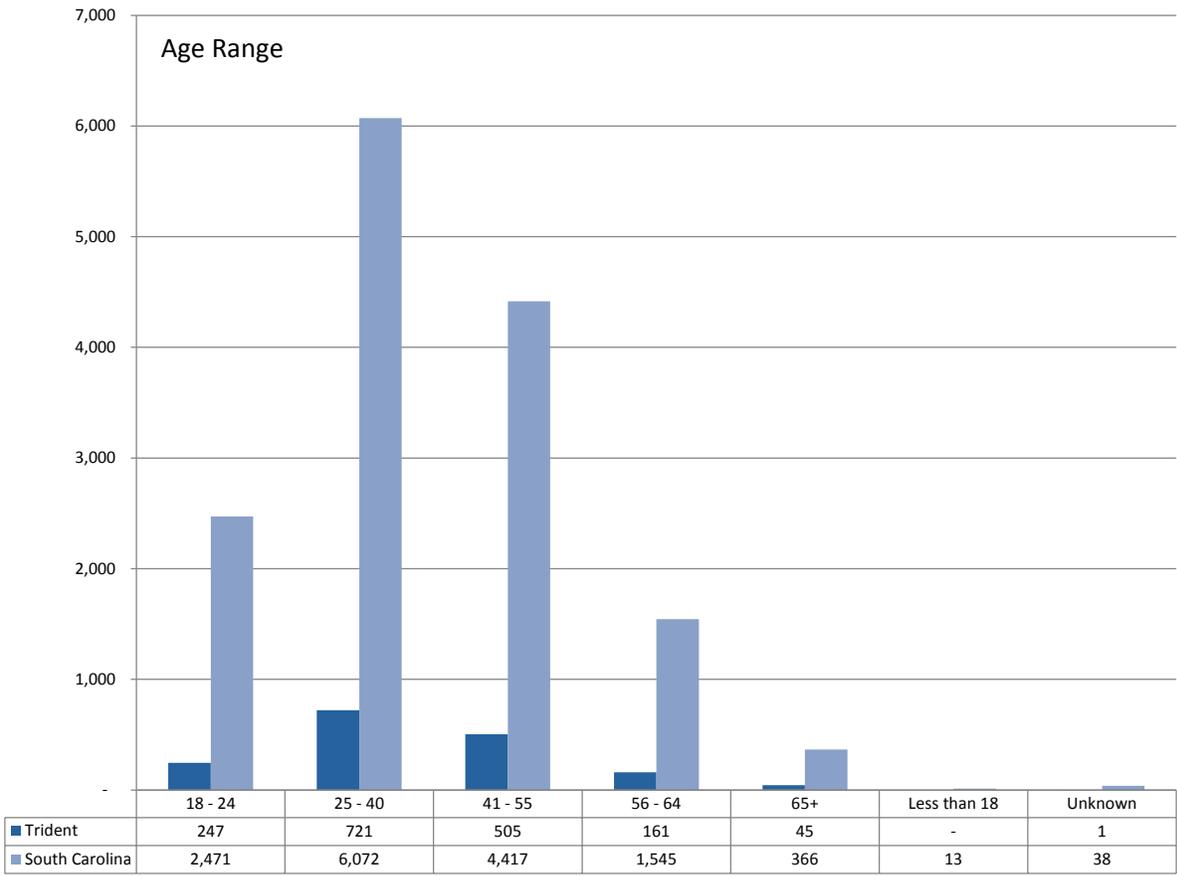
Source: SCDEW

UNEMPLOYMENT INSURANCE CLAIMANT CHARACTERISTICS

The people in this area who were receiving unemployment insurance benefits in April 2013 were typically female, black, 25-40 years old, and were high school graduates or earned a GED.

Figure 22: UI Claimant Characteristics - April 2013





Source: SCDEW

DEMAND: WHAT DO WE NEED?

Workforce demand shows what is needed in an area to support current and future employers. This section examines current (real-time) demand through online job advertisements, industry and occupational projections to 2018, educational requirements for future jobs, and the skills needed for those occupations.

Online job advertisements give a snapshot of what positions need to be filled in an area. The data is from the Conference Board Help Wanted OnLine® Data Series (HWOL) which measures the number of new and reposted job ads from over 16,000 Internet job boards. In April 2013, the largest occupational group with job ads in the Trident LWIA was Sales and Related Occupations followed by Food Preparation and Serving Related Occupations.

ONLINE JOB ADVERTISEMENTS

Figure 23: Trident HWOL - April 2013 by Major Group

Occupation	# of Job Ads
Sales and Related Occupations	1,723
Food Preparation and Serving Related Occupations	1,400
Office and Administrative Support Occupations	1,140
Healthcare Practitioners and Technical Occupations	1,122
Computer and Mathematical Occupations	1,119
Miscellaneous	1,064
Transportation and Material Moving Occupations	898
Management Occupations	805
Installation, Maintenance, and Repair Occupations	720
Construction and Extraction Occupations	596
Building and Grounds Cleaning and Maintenance Occupations	470
Business and Financial Operations Occupations	436
Architecture and Engineering Occupations	344
Production Occupations	299
Education, Training, and Library Occupations	292
Personal Care and Service Occupations	289
Healthcare Support Occupations	264
Arts, Design, Entertainment, Sports, and Media Occupations	263
Protective Service Occupations	129
Community and Social Services Occupations	84
Legal Occupations	65
Life, Physical, and Social Science Occupations	43
Farming, Fishing, and Forestry Occupations	12
Military Specific Occupations	5

Note: A job advertisement may include multiple openings.

Source: The Conference Board Help Wanted OnLine® Data Series (HWOL)

INDUSTRY PROJECTIONS

The Health Care and Social Assistance industry is projected to have the largest growth from 2008 to 2018, growing by 7,919 jobs or 792 jobs/year. This sector includes services such as ambulatory health care services, hospitals, nursing and residential care facilities, and social assistance services. Manufacturing reports the next largest growth with a projected 610 openings/year. This sector includes Primary Metal Manufacturing; Chemical Manufacturing; Non-metallic Mineral Product Manufacturing; and Transportation Equipment Manufacturing.

Figure 24: Industry Projections - 2008-2018

Industry	Estimate Employment (2008)	Projected Employment (2018)	Change	Percent Change	Annual Percent Change
Total Employment, All Jobs	312,326	355,001	42,675	13.66	1.29
Health Care and Social Assistance	33,299	41,218	7,919	23.78	2.16
Retail Trade	35,797	39,962	4,165	11.64	1.11
Accommodation and Food Services	32,657	35,887	3,230	9.89	0.95
Educational Services	26,208	29,483	3,275	12.50	1.18
Manufacturing	22,676	28,776	6,100	26.90	2.41
Government	25,312	26,384	1,072	4.24	0.42
Administrative and Support and Waste Management and Remediation	20,671	22,650	1,979	9.57	0.92
Professional, Scientific, and Technical Services	16,811	22,515	5,704	33.93	2.96
Construction	17,864	19,114	1,250	7.00	0.68
Other Services (Except Government)	12,910	14,591	1,681	13.02	1.23
Transportation and Warehousing	10,906	11,534	628	5.76	0.56
Wholesale Trade	7,571	8,182	611	8.07	0.78
Finance and Insurance	7,502	7,977	475	6.33	0.62
Information	5,337	6,252	915	17.14	1.60
Real Estate and Rental and Leasing	5,214	5,857	643	12.33	1.17
Arts, Entertainment, and Recreation	4,252	5,273	1,021	24.01	2.18
Agriculture, Forestry, Fishing and Hunting	2,344	2,239	-105	-4.48	-0.46
Management of Companies and Enterprises	1,109	1,450	341	30.75	2.72
Utilities	1,014	1,055	41	4.04	0.40
Mining	176	178	2	1.14	0.11

Source: BLS, SCDEW, QCEW, WI

OCCUPATIONAL PROJECTIONS

Many of the occupations projected to have numerous openings between 2008 and 2018 in this area support a growing economy. The diverse industrial base of the Trident LWIA drives a need for manufacturing employees, including Team Assemblers; Industrial Machinery Mechanics; Machinists; and Industrial Engineers. Healthcare occupations as well as other technical occupations lead the projected employment listing, as shown in Figure 25.

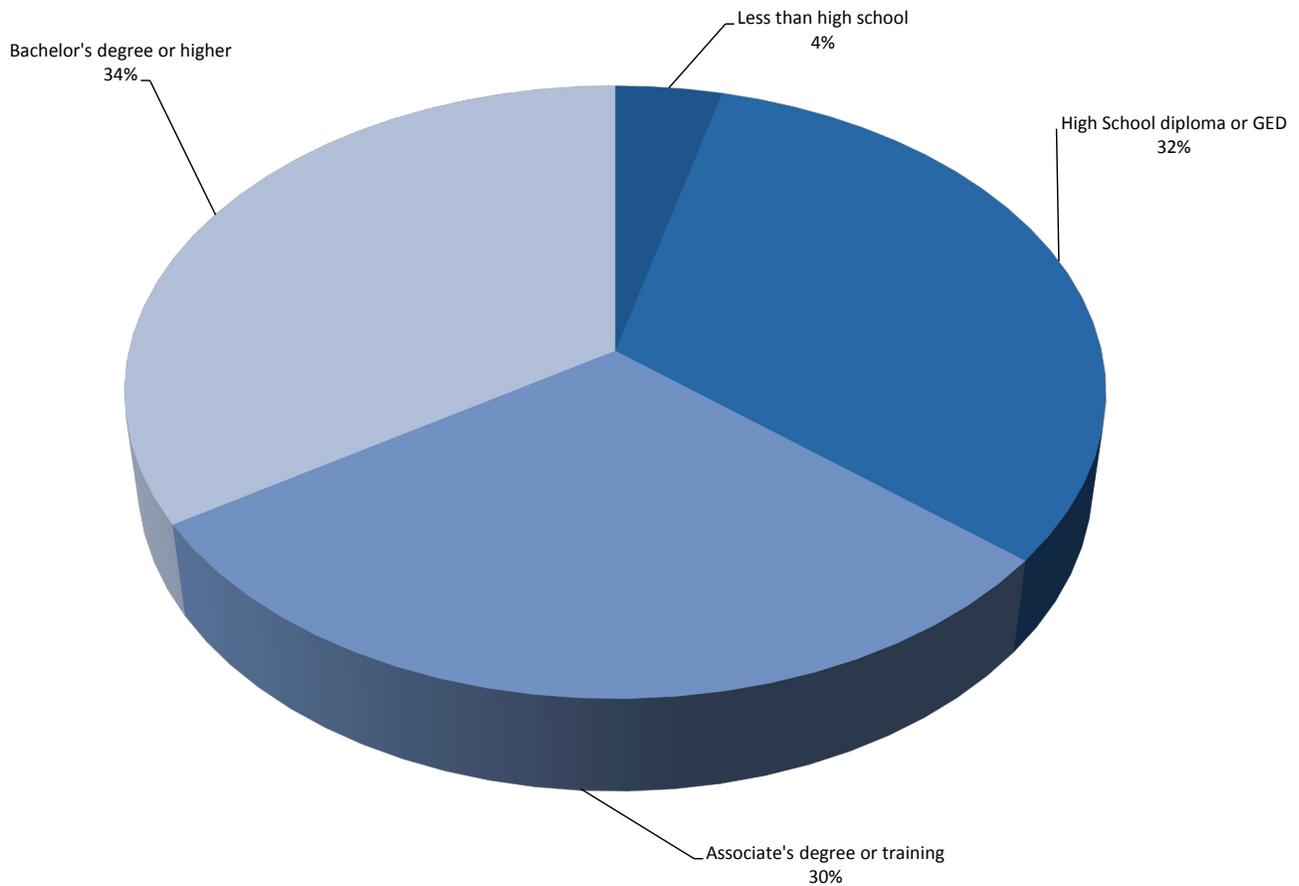
Figure 25: Growing Occupations - 2008-2018

Occupation	Estimated Employment (2008)	Projected Employment (2018)
Team Assemblers	3,322	4,604
Industrial Machinery Mechanics	896	1,380
Pharmacy Technicians	1,037	1,349
Machinists	909	1,306
Industrial Engineers	722	1,143
Paralegals and Legal Assistants	787	1,042
Personal and Home Care Aides	704	971
Mechanical Engineers	677	910
Dental Assistants	530	728
Purchasing Agents, Exc Wholesale, Retail & Farm	513	675
Engineering Managers	505	655
Dental Hygienists	444	614
Personal Financial Advisors	351	483
Computer and Information Systems Managers	359	474
Veterinary Technologists and Technicians	182	250
Environmental Engineers	162	213
Medical Equipment Repairers	128	168
Environmental Engineering Technicians	88	114
Painting, Coating, and Decorating Workers	86	112
Environmental Scientists and Specialists	61	83

Source: BLS, SCDEW, OES, WI

Of the top 50 projected growing occupations by percent change, 16 require a high school diploma or GED, two require less than a high school diploma or GED, 17 require a bachelor's degree or more, 15 need an associate's degree or require some kind of postsecondary vocational training. Each of the two requiring less than a high school diploma or GED does require short-term on-the-job training (OJT), which is defined by the US Department of Labor as less than one month.

Figure 26: Education for Top 50 Projected Occupations



Source: BLS, SCDEW, OES, WI

It is just as important to know which occupations are declining in the area. Declines are often due to technological advances (i.e. computers or robots replacing humans), so many of the declining occupations are projected to be in manual labor jobs, as shown in Figure 27.

Figure 27: Top 20 Projected Declining Occupations in Trident - 2008-2018

Occupation
Broadcast Technicians
Chemical Plant and System Operators
Computer, Automated Teller & Office Mach. Repairer
Conveyor Operators and Tenders
Crane and Tower Operators
Dispatchers, Except Police, Fire, and Ambulance
Extruding and Forming Machine Setters, Operators
Farmworkers & Laborers, Crop, Nursery & Greenhouse
File Clerks
Mail Clerks and Mail Machine Operators
Meter Readers, Utilities
Order Clerks
Payroll and Timekeeping Clerks
Postal Service Clerks
Postal Service Mail Carriers
Postmasters and Mail Superintendents
Radio and Television Announcers
Roofers
Telemarketers
Word Processors and Typists

Source: BLS, SCDEW, OES, WI

SKILLS OF PROJECTED OCCUPATIONS

Using the top 50 projected growing occupations, the skill levels needed for the future workforce based on the definitions given earlier in this report can be categorized.

Figure 28: Skill Levels

Low	5
Middle	28
High	17

Source: BLS, SCDEW, OES, WI

Low-skilled jobs often have commensurate (i.e. low) pay and do not require much education, experience, or OJT. Does the supply of workers have the right skills for the jobs in the future?

WORKFORCE CHALLENGES

The current economic situation in the Trident LWIA, the supply of workers, and the characteristics of workers who will be in demand has been reviewed. What can be gleaned from these findings? Are there gaps between supply and demand?

Supply Findings

With the population growing steadily until 2030 and a larger-than-the-state share of 20-39 year olds, this area looks to have the human resources to meet the challenge in having a proper mix of workers. In-migration from other states/countries adds a notable number of residents at the top end of the educational spectrum. The LWIA has a higher percent of residents aged 25 and older with a college degree than the state does as a whole.

Many high school students selected the Health Science career cluster in keeping with state trends. The next most popular career cluster was Arts, Audio/Video/Technology, and Communications.

Demand Findings

Employer demand was consistent between online advertisements (current) and 2018 projected occupations (long-term needs) in general. Both had the need for workers in Business, Management, and Administration; Health Science; and Marketing, Sales, and Service. In addition, Hospitality and Tourism was a long-term demand. Most of the top projected occupations require at least a high school diploma or GED.

Figure 29: Comparison of Supply and Demand

	Demand		Supply	
	Top online ads	Projected Occupations	Degrees Earned	Career Clusters Selected
Agriculture, Food and Natural Resource	1.9	2.0	0.6	1.6
Architecture and Construction	7.1	6.7	1.1	3.6
Arts, Audio/Video Technology and Communications	2.5	1.2	3.8	17.0
Business, Management and Administration	13.2	17.8	16.2	5.6
Education and Training	3.6	4.9	19.7	4.6
Finance	4.0	2.1	0.0	0.9
Government and Public Administration	0.2	0.2	3.2	3.3
Health Science	12.8	9.8	25.4	21.2
Hospitality and Tourism	8.6	13.1	2.7	3.8
Human Service	5.0	5.4	6.0	5.6
Information Technology	8.8	2.1	2.4	4.1
Law, Public Safety, Corrections and Security	1.7	1.7	3.6	8.8
Manufacturing	3.2	6.1	1.4	2.1
Marketing, Sales and Service	16.3	17.0	0.3	1.7
Science, Technology, Engineering and Mathematics	2.9	2.6	11.9	13.2
Transportation, Distribution, and Logistics	8.3	7.1	1.6	3.1

Source: BLS, SCDEW, WI, SC Department of Education, OES, HWOL

A few observations about the comparison that could be considered challenges to the workforce pipeline include:

- The supply of Health Science and STEM graduates and students is greater than employment demand in the short- and long-terms, while just the opposite is true for the Hospitality and Tourism; Marketing, Sales and Service; and Transportation, Distribution, and Logistics industries.
- There are many post-secondary degrees being earned in Education and Training that exceed short-term demand.
- There is a short-term demand that is not being met by today's graduates in the area for Architecture and Construction; Finance; and Information Technology.
- There is an overabundance of the Arts, Audio/Video Technology and Communication and Law, Public Safety, Corrections and Security clusters selected by students that will exceed long-term demand.
- The long-term demand for workers in Business, Management and Administration and Manufacturing is not projected to be met by today's students.

There is always a demand for employees with soft skills. It is said that hard skills (training, degrees, or certification) get you hired, but soft skills get you fired. Many of our residents need to learn or get a refresher in soft skills in order to KEEP their jobs. Employers see the need.

Top 10 Soft Skills Found in Online Ads for South Carolina (April 2013)

1. Oral and written communication skills
2. Customer Service Oriented
3. Problem solving
4. Detail oriented
5. Microsoft Office
6. Self-starting / Self-motivated
7. Organizational skills
8. Troubleshooting
9. Work independently
10. Sales experience

Source: *The Conference Board Help Wanted OnLine*® Data Series (HWOL)

CONCLUSION

The Trident LWIA area, overall, encompasses a growing and diverse economy. The population continues to increase steadily, and the education level for the population is higher than the state as a whole with higher percentages of residents with education beyond high school. The workforce (current and potential) does face challenges in having the proper mix of employer demand being met by trained applicants. There are high levels of employers advertising for jobs in business, management, marketing, and sales, and health care. However, some supply flows could be fine-tuned to be more in line with demand.

The data shows that:

- There is an undersupply of students choosing Business, Management and Administration; Hospitality and Tourism; Manufacturing; Transportation, Distribution, and Logistics; and Marketing, Sales and Service studies to meet the area's future employment demand.
- There is an oversupply students choosing Arts, Audio/Video Technology and Communication; Law, Public Safety, Corrections and Security; STEM; and Health Sciences that will far outpace the future employment demand in the LWIA.
- Comprehensive soft skills training is needed for all students and job seekers (high school, post-secondary, adult, new and returning entrants to the labor force, and incumbent workers) so that they can not only get hired but retain their positions and thus reduce employee turnover.

Getting education in line with the demands of employers will help the Trident LWIA meet the challenges it faces.

UPPER SAVANNAH LWIA WORKFORCE REPORT 2012



The *Upper Savannah Workforce Report* is published by the Labor Market Information (LMI) Department of the South Carolina Department of Employment and Workforce. The information and analyses provided in this publication are based on data collected from sources throughout South Carolina and the United States.

About SC DEW and LMI:

The Labor Market Information Department compiles and publishes employment statistics, job forecasts, wage data, demographics, and other labor market information to help public and private organizations, researchers, and others better understand today's complex workforce.

The LMI Department produced this report under the leadership of:

Executive Director - Cheryl Stanton
Interim Deputy Assistant Executive Director - Kerry Paul
Labor Market Information Director - Brenda Lisbon

South Carolina Department of Employment and Workforce
1550 Gadsden Street
Columbia, South Carolina 29201
(803) 737-2660
www.dew.sc.gov
www.scworkforceinfo.com



TABLE OF CONTENTS

EXECUTIVE SUMMARY	VI
INTRODUCTION	VII
ECONOMIC DISCUSSION: A CURRENT PICTURE OF THE WORKFORCE	1
EMPLOYMENT BY INDUSTRY	1
LOCATION QUOTIENT	1
AVERAGE ANNUAL WAGE BY INDUSTRY	2
OCCUPATIONAL EMPLOYMENT	3
SKILLS DATA	4
EMPLOYMENT AND UNEMPLOYMENT	6
NEW STARTUP FIRMS	8
EMPLOYERS BY SIZE OF ESTABLISHMENT	9
SUPPLY: WHAT'S OUT THERE?	10
POPULATION BY AGE	10
POPULATION CHANGE AND MIGRATION	11
COMMUTING PATTERNS	12
EDUCATIONAL ATTAINMENT	12
CAREER CLUSTERS SELECTED BY HIGH SCHOOL STUDENTS	13
DEGREES AWARDED	15
CHARACTERISTICS OF UI CLAIMS BY OCCUPATION	16
UNEMPLOYMENT INSURANCE CLAIMANT CHARACTERISTICS	17
DEMAND: WHAT DO WE NEED?	20
ONLINE JOB ADVERTISEMENTS	20
INDUSTRY PROJECTIONS	21
OCCUPATIONAL PROJECTIONS	21
SKILLS OF PROJECTED OCCUPATIONS	24
WORKFORCE CHALLENGES	25
CONCLUSION	27

TABLE OF FIGURES

FIGURE 1: UPPER SAVANNAH LWIA EMPLOYMENT BY INDUSTRY - 3RD QUARTER 2012.....	1
FIGURE 2: NOTABLE LOCATION QUOTIENTS - 2011	2
FIGURE 3: ANNUAL AVERAGE WAGE BY INDUSTRY - 3RD QUARTER 2012.....	3
FIGURE 4: TOP 20 OCCUPATIONS WITH WAGES - 2012.....	4
FIGURE 5: TOP OCCUPATIONS BY SKILL CLASSIFICATION - UPPER SAVANNAH 2012.....	5
FIGURE 6: EMPLOYMENT - 2002-2012.....	6
FIGURE 7: UNEMPLOYMENT - 2002-2012	7
FIGURE 8: ANNUAL UNEMPLOYMENT - 2002-2012	8
FIGURE 9: MONTHLY UNEMPLOYMENT RATE - FEBRUARY 2011-MARCH 2013	8
FIGURE 10: NEW STARTUP FIRMS - 2007-2012.....	9
FIGURE 11: EMPLOYERS BY SIZE OF ESTABLISHMENT - 3RD QUARTER 2012.....	9
FIGURE 12: POPULATION BY AGE	10
FIGURE 13: POPULATION PROJECTIONS TO 2030.....	11
FIGURE 14: POPULATION MIGRATION - 2011 - 5-YEAR ESTIMATE.....	11
FIGURE 15: COMMUTING PATTERNS - 2010.....	12
FIGURE 16: EDUCATIONAL ATTAINMENT - UPPER SAVANNAH AND SOUTH CAROLINA 2011	12
FIGURE 17: EDUCATIONAL ATTAINMENT - UPPER SAVANNAH 2011	13
FIGURE 18: PERCENT OF STUDENTS DECLARING A CAREER CLUSTERS IN UPPER SAVANNAH AND SC - 2012	14
FIGURE 19: CAREER CLUSTERS - 2012.....	15
FIGURE 20: TOP 20 MAJORS IN UPPER SAVANNAH - 2011	16
FIGURE 21: CHARACTERISTICS OF UI CLAIMS BY OCCUPATION - APRIL 2013.....	17
FIGURE 22: UI CLAIMANT CHARACTERISTICS - APRIL 2013.....	18
FIGURE 23: UPPER SAVANNAH HWOL - APRIL 2013 BY MAJOR GROUP.....	20
FIGURE 24: INDUSTRY PROJECTIONS - 2008-2018	21
FIGURE 25: GROWING OCCUPATIONS - 2008-2018.....	22
FIGURE 26: EDUCATION FOR TOP 50 PROJECTED OCCUPATIONS	23
FIGURE 27: TOP 20 PROJECTED DECLINING OCCUPATIONS IN UPPER SAVANNAH - 2008-2018.....	24
FIGURE 28: SKILL LEVELS.....	24
FIGURE 29: COMPARISON OF SUPPLY AND DEMAND.....	25

EXECUTIVE SUMMARY

The employment leaders for Upper Savannah Local Workforce Investment Area (LWIA) are Manufacturing and Healthcare and Social Assistance. Employment growth is anticipated by 2018 in several industries, especially Health Care and Social Assistance and Administrative and Support and Waste Management and Remediation Services. The highest wages are paid by the Utilities and Wholesale Trade industries.

The LWIA's population grew by 4.2 percent from 2000 to 2010, and it has more residents 50 and over and less residents aged 20 to 39 than the state's average.

Employment is rising and unemployment is declining, although the LWIA has a current and historically higher unemployment rate than the state. Employment is concentrated in Greenwood, and nearly 18,000 more people leave the LWIA for work than enter it every day. Manufacturing is the largest industry represented in unemployment claims.

Upper Savannah has a higher proportion of residents with a high school education than the state does as a whole. However, 22 percent of residents do not have a high school diploma, and a lower percent of residents have postsecondary training than does the state overall. For projected growing jobs, 10 percent require no diploma, 34 percent require a diploma or GED, 14 percent require an associate's degree or vocational training, and 42 percent require a bachelor's degree or higher.

Upper Savannah LWIA businesses desire a trained workforce with the current focus being on manufacturing-specific certifications, like Computer Numerical Control machining and welding. The advanced Manufacturing industry is having difficulty meeting its employee needs with Upper Savannah's contemporary workforce. Although many manufacturing firms are willing to train their workers, there exists a perception gap between current and former manufacturing techniques, opportunities, and environments.

Upper Savannah LWIA has several factors working in its favor. It has a growing population and several educational institutions available to strengthen the workforce. The Manufacturing sector is an expanding employment force and has a high job multiplier. Workers are becoming smarter and are gaining skills; the LWIA is transitioning from low to middle skilled jobs.

The patterns and trends described in this report offer cause for both optimism and concern. Upper Savannah LWIA has an exciting future ahead of it, and it can lead the way in delivering the skilled talent and economic opportunities that businesses and workers in the area deserve.

INTRODUCTION

The Upper Savannah Local Workforce Investment Area is composed of Abbeville, Edgefield, Greenwood, Laurens, McCormick, Newberry, and Saluda counties and is located in the western part of our state. The LWIA borders Georgia and is home to the Ninety Six National Historic Site, the Greenwood Genetic Center, Lander University, Lake Greenwood, Lake Thurmond, Lake Russell, and six state parks.

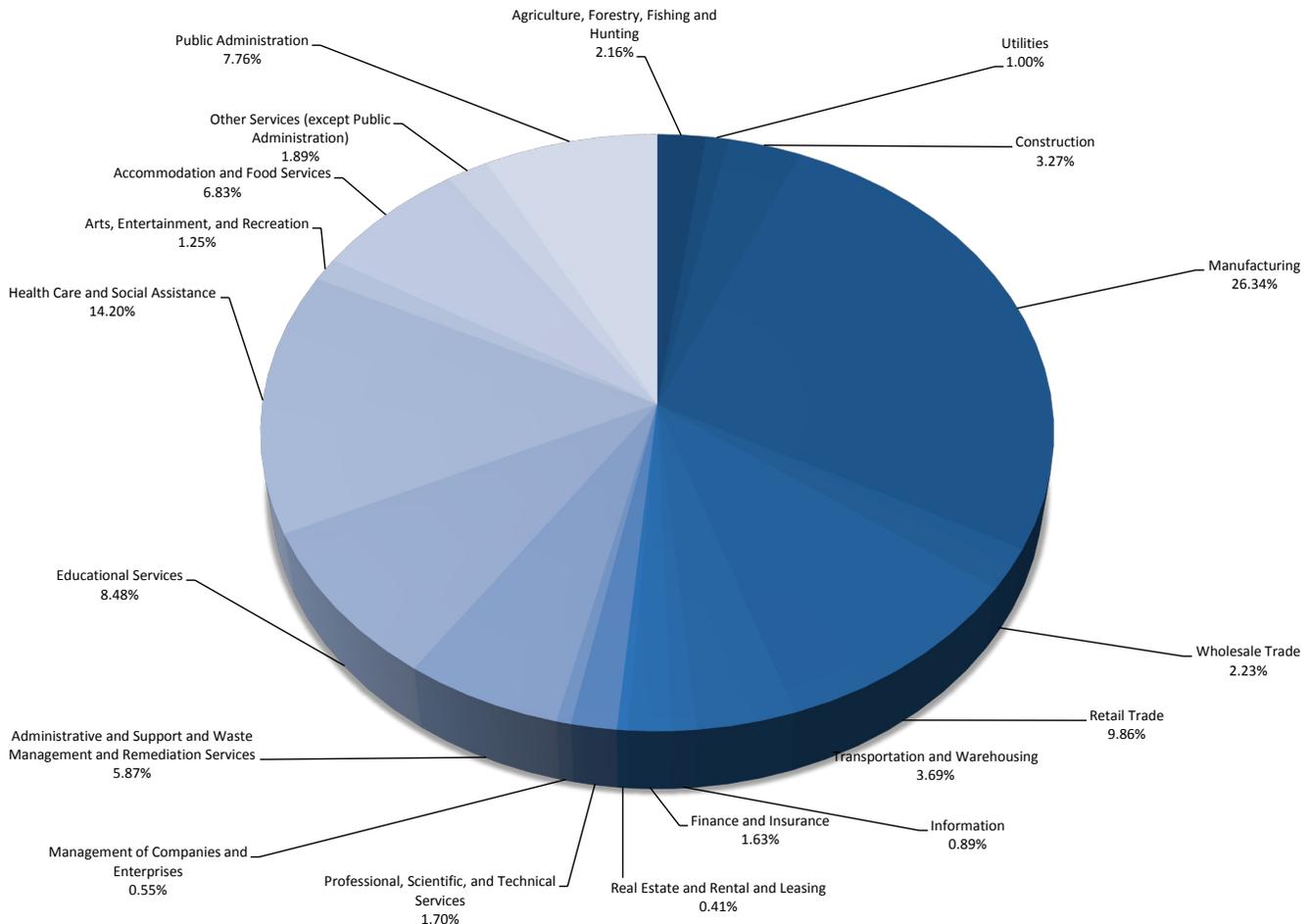
The economic changes this year in the Upper Savannah LWIA demonstrate the shifting needs of employers and employees. Cultivating an understanding of the workforce allows all seven counties to respond to anticipated future needs. Analyses help to identify the gap between what the workforce has in the way of talent and skills (supply), and what it may need in the future (demand).

The purpose of the Upper Savannah LWIA Workforce Report is to present a comprehensive view of the status of Upper Savannah counties' economy and workforce. The report includes an analysis of Upper Savannah LWIA's workforce, industries, economic climate, and factors that will affect all three. Forecasts will be made for the workforce, industries, and the economy.

ECONOMIC DISCUSSION: A CURRENT PICTURE OF THE WORKFORCE

EMPLOYMENT BY INDUSTRY

Figure 1: Upper Savannah LWIA Employment By Industry - 3rd Quarter 2012



Source: Bureau of Labor Statistics (BLS), SC Department of Employment & Workforce (SCDEW), Quarterly Census of Employment and Wages (QCEW)

The Manufacturing and Healthcare and Social Assistance industries employ many workers in the Upper Savannah LWIA. Industries like Educational Services and Healthcare and Social Assistance are healthy and flourishing, while others like Construction are still recovering from the recession. The 2010 per capita income for a Upper Savannah LWIA resident was \$29,278, which is an increase of 39.9 percent from 2000.¹ Economic growth has taken place in the past decade to enhance the LWIA's workers, although the area is still recovering from a tough business cycle.

LOCATION QUOTIENT

A location quotient (LQ) is a useful tool for determining the concentration of workers in a given area. Location quotients compare the regional share of employment in a particular industry to the national share of employment in the same industry. The resulting quotient reveals the degree of regional specialization or concentration in an industry and provides insight into what makes the area unique in comparison to the national average. An LQ of 1.0 means the concentration of jobs in that industry matches the nation's value. Location quotients higher than 1.0 indicate the level of specialization the area has in particular sectors. Lower quotients can indicate a possible area that could be expanded.

Figure 2: Notable Location Quotients - 2011

Industry and Sectors	Location Quotient
<i>Abbeville County</i>	
Furniture and Related Product Manufacturing	4.1
Manufacturing	3.7
Utilities	2.2
<i>Edgefield County</i>	
Textile Mills	92.5
Forestry and Logging	49.5
Crop Production	26.2
<i>Greenwood County</i>	
Chemical Manufacturing	10.7
Wood Product Manufacturing	6.0
Forestry and Logging	3.3
<i>Laurens County</i>	
Plastics and Rubber Products Manufacturing	20.9
Textile Mills	17.4
Wood Product Manufacturing	10.6
<i>McCormick County</i>	
No Data	
<i>Newberry County</i>	
Forestry and Logging	40.3
Wood Product Manufacturing	16.1
Animal Production and Aquaculture	10.0
<i>Saluda County</i>	
Animal Production and Aquaculture	26.6
Forestry and Logging	20.2
Agriculture and Forestry Support Activities	10.8

Source: US Department of Labor, Bureau of Labor Statistics - http://data.bls.gov/location_quotient

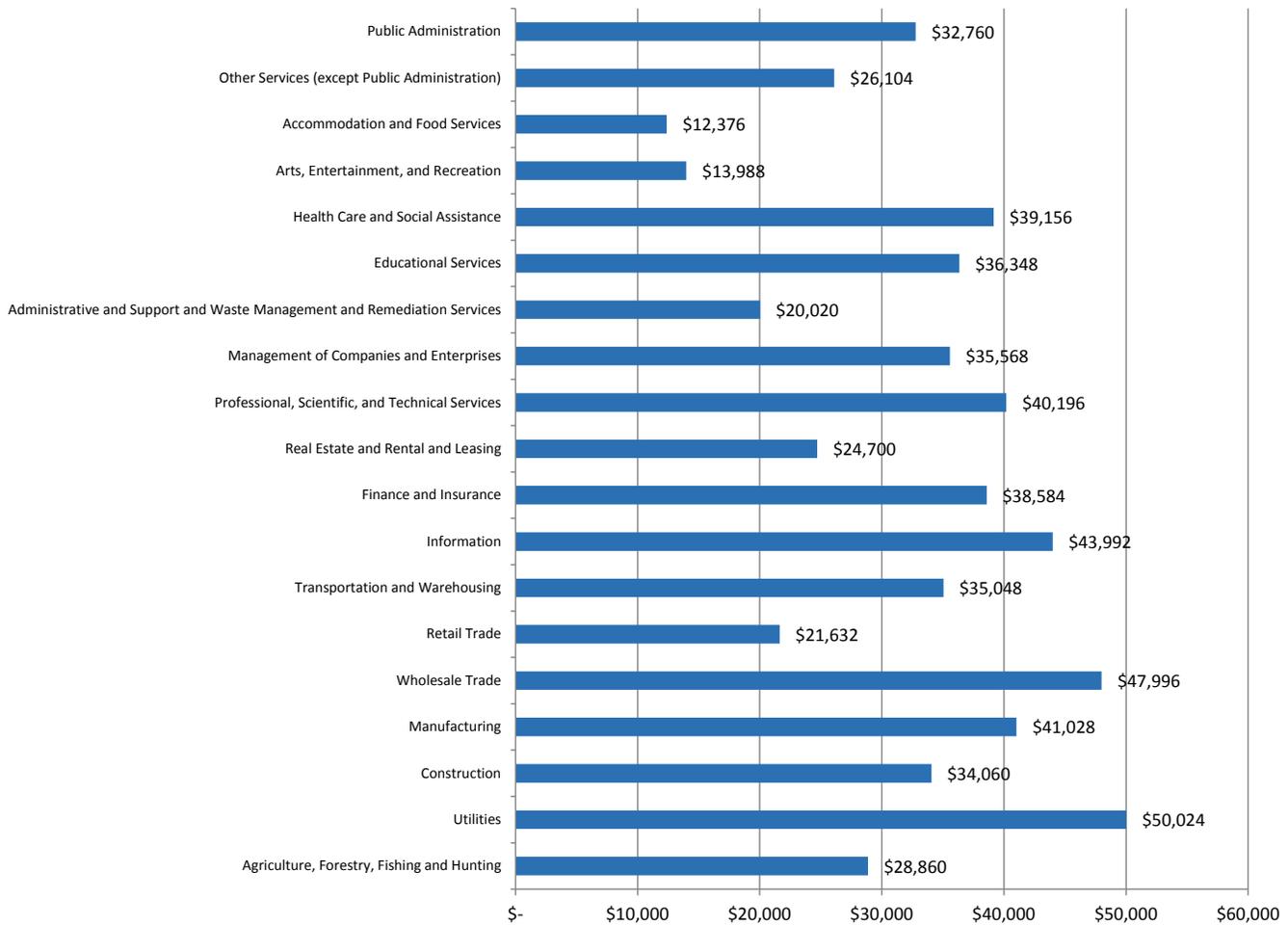
Textile Mills, Forestry and Logging, and several types of Manufacturing top the most concentrated industries in this area with location quotients above 3.0. Textile Mill companies transform a basic fiber into a product like yarn or fabric. The manufacturing sectors that are also concentrated in this area include: Wood Product Manufacturing; Plastics and Rubber; and Furniture and Related Product.

AVERAGE ANNUAL WAGE BY INDUSTRY

The annual wages for utility workers are usually among the highest for any LWIA industry. These workers have a wide range of education (high school diploma to PhD) and tend to stay in their jobs for a very long time, which increases the average wage as small raises accumulate over time.

High wage industries like Information, Professional, Scientific, and Technical Services, and Finance and Insurance usually require at least a bachelor's degree. Having an education is an excellent way to enter a high-wage industry and have more options for employment.

Figure 3: Annual Average Wage by Industry - 3rd Quarter 2012



Source: BLS, SCDEW, QCEW

OCCUPATIONAL EMPLOYMENT

When examining the current occupational employment in the area, one can observe that some of the top 20 occupations are low-skill, low-pay jobs. These jobs, like Cashiers, Waiters and Waitresses, and Janitors, have high turnover. These are not necessarily the most robust jobs as far as wages, but they are jobs.

Figure 4 lists occupations, like Registered Nurses, Elementary School Teachers, and General Managers that pay a higher wage. Manufacturing and Healthcare comprise about 40 percent of the employment in the Upper Savannah LWIA, reflected in this list of top occupations: Team Assemblers, Laborers and Material Movers; and Registered Nurses.

Figure 4: Top 20 Occupations with Wages - 2012

Occupational Title	Total Employment	Hourly Average Wage (\$)
All Occupations	107,320	17.88
Cashiers	3,830	8.99
Retail Salespersons	3,760	10.69
Combined Food Preparation and Serving Workers Including Fast Food	2,900	8.56
Team Assemblers	2,440	16.87
Registered Nurses	2,220	28.31
Office Clerks General	1,920	11.35
Laborers and Freight Stock and Material Movers Hand	1,900	13.13
Janitors and Cleaners Except Maids and Housekeeping Cleaners	1,860	10.25
Maintenance and Repair Workers General	1,800	16.76
Customer Service Representatives	1,790	12.50
Secretaries and Administrative Assistants Except Legal Medical and Executive	1,640	13.81
Elementary School Teachers Except Special Education	1,440	22.61
General and Operations Managers	1,360	43.64
Heavy and Tractor-Trailer Truck Drivers	1,330	17.32
First-Line Supervisors of Retail Sales Workers	1,300	17.72
Nursing Assistants	1,300	9.38
Waiters and Waitresses	1,280	8.34
First-Line Supervisors of Office and Administrative Support Workers	1,260	20.80
Bookkeeping Accounting and Auditing Clerks	1,130	14.63
Stock Clerks and Order Fillers	1,130	10.87

Source: BLS, SCDEW, Occupational Employment Statistics (OES)

SKILLS DATA

Employers are beginning to see that a person’s skills, in addition to their education, may help in determining who to hire. Many times the degree is not as important as the skills gained through specialized training and/or experience. In order to be able to determine the current level of skills in the area, the top 50 current occupations by employment are presented, and assigned a low, middle, or high skill designation to that occupation. The definitions for those skills levels are:

- **LOW:** No high school or GED, or high school/GED with less than one year experience and no on-the-job-training (OJT), or short-term OJT
- **MIDDLE:** High school/GED with one year experience, or moderate OJT, or long-term OJT, or apprenticeship, or postsecondary vocational training, or some college, or Associate’s Degree, or less than a Bachelor’s Degree
- **HIGH:** Bachelor’s Degree or higher

In the Upper Savannah area, 23 of the top 50 jobs in 2012 are considered low-skill jobs. Twenty-three are middle skill, and four are high-skill occupations.

Figure 5: Top Occupations By Skill Classification - Upper Savannah 2012

Skillset: LOW
Cashiers
Combined Food Preparation and Serving Workers, Including Fast Food
Construction Laborers
Cooks, Fast Food
Cooks, Institution and Cafeteria
Customer Service Representatives
Electrical and Electronic Equipment Assemblers
Food Preparation Workers
Helpers--Production Workers
Janitors and Cleaners, Except Maids and Housekeeping Cleaners
Laborers and Freight, Stock, and Material Movers, Hand
Landscaping and Groundskeeping Workers
Office Clerks, General
Personal Care Aides
Photographic Process Workers and Processing Machine Operators
Receptionists and Information Clerks
Retail Salespersons
Secretaries and Administrative Assistants, Except Legal, Medical, and Executive
Shipping, Receiving, and Traffic Clerks
Stock Clerks and Order Fillers
Teacher Assistants
Tellers
Waiters and Waitresses
Skillset: MIDDLE
Automotive Service Technicians and Mechanics
Bookkeeping, Accounting, and Auditing Clerks
Carpenters
Computer-Controlled Machine Tool Operators, Metal and Plastic
Correctional Officers and Jailers
First-Line Supervisors of Food Preparation and Serving Workers
First-Line Supervisors of Office and Administrative Support Workers
First-Line Supervisors of Production and Operating Workers
First-Line Supervisors of Retail Sales Workers
General and Operations Managers
Grinding, Lapping, Polishing, and Buffing Machine Tool Setters, Operators, and Tenders, Metal and Plastic
Heavy and Tractor-Trailer Truck Drivers
Inspectors, Testers, Sorters, Samplers, and Weighers
Lathe and Turning Machine Tool Setters, Operators, and Tenders, Metal and Plastic
Licensed Practical and Licensed Vocational Nurses
Machinists
Maintenance and Repair Workers, General
Nursing Assistants
Packaging and Filling Machine Operators and Tenders
Police and Sheriff's Patrol Officers
Registered Nurses
Sales Representatives, Wholesale and Manufacturing, Except Technical and Scientific Products
Team Assemblers
Skillset: HIGH
Accountants and Auditors
Elementary School Teachers, Except Special Education
Middle School Teachers, Except Special and Career/Technical Education
Secondary School Teachers, Except Special and Career/Technical Education

Source: BLS, SCDEW, OES, Workforce Intelligence (WI)

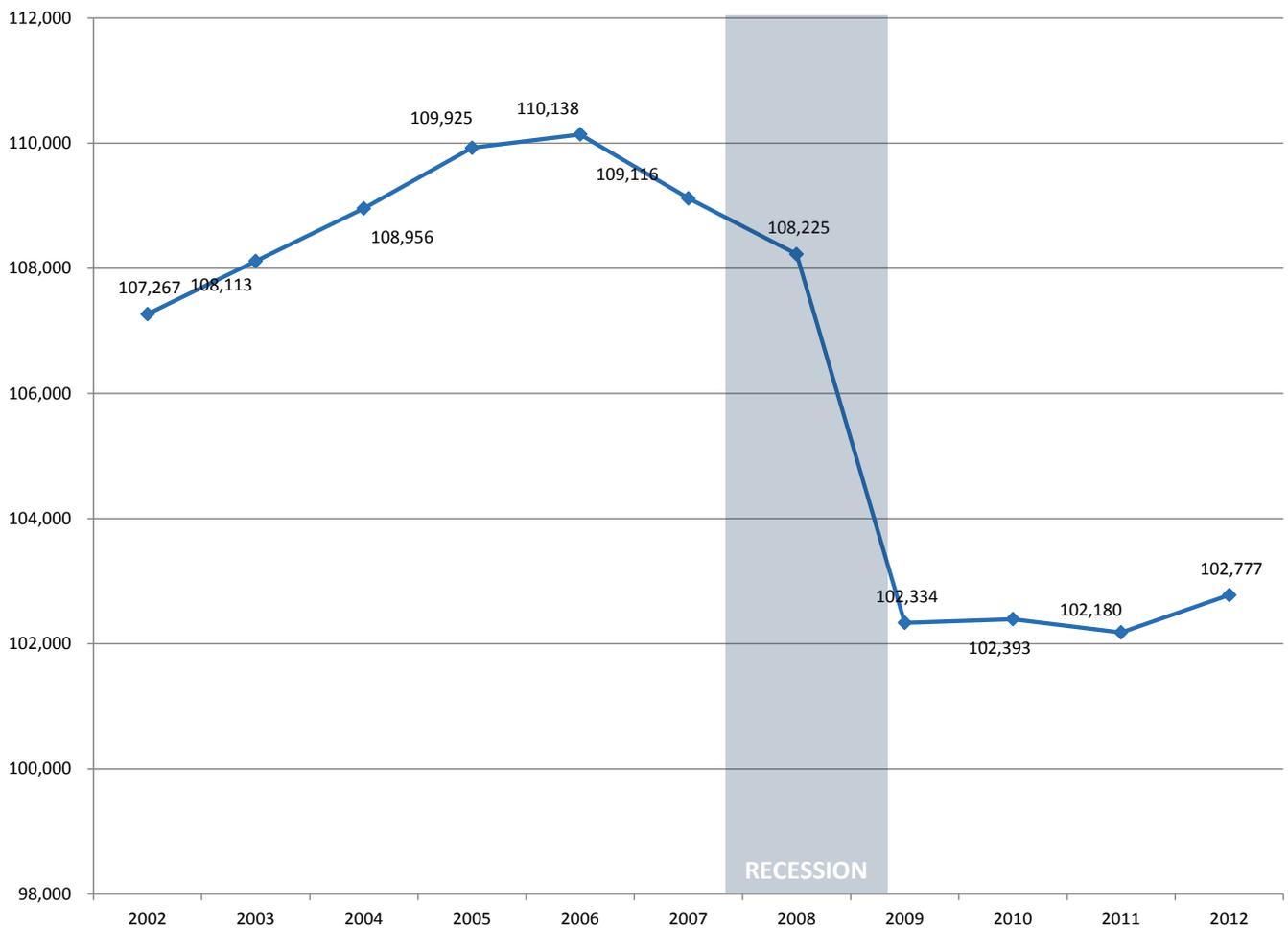
EMPLOYMENT AND UNEMPLOYMENT

A crucial indicator of the health of a workforce is its labor force levels. Labor force data count residents who are employed and unemployed. There are a few Federal definitions that will make discussion of the labor force a little easier to understand.

- Employed: Persons 16 years old or older who worked for pay any time during the week that includes the 12th of the month
- Unemployed: Persons 16 years old or older who are not working but want a job, and are able and willing to work
- Labor Force: Employed plus unemployed
- Unemployment Rate: Unemployment divided by labor force

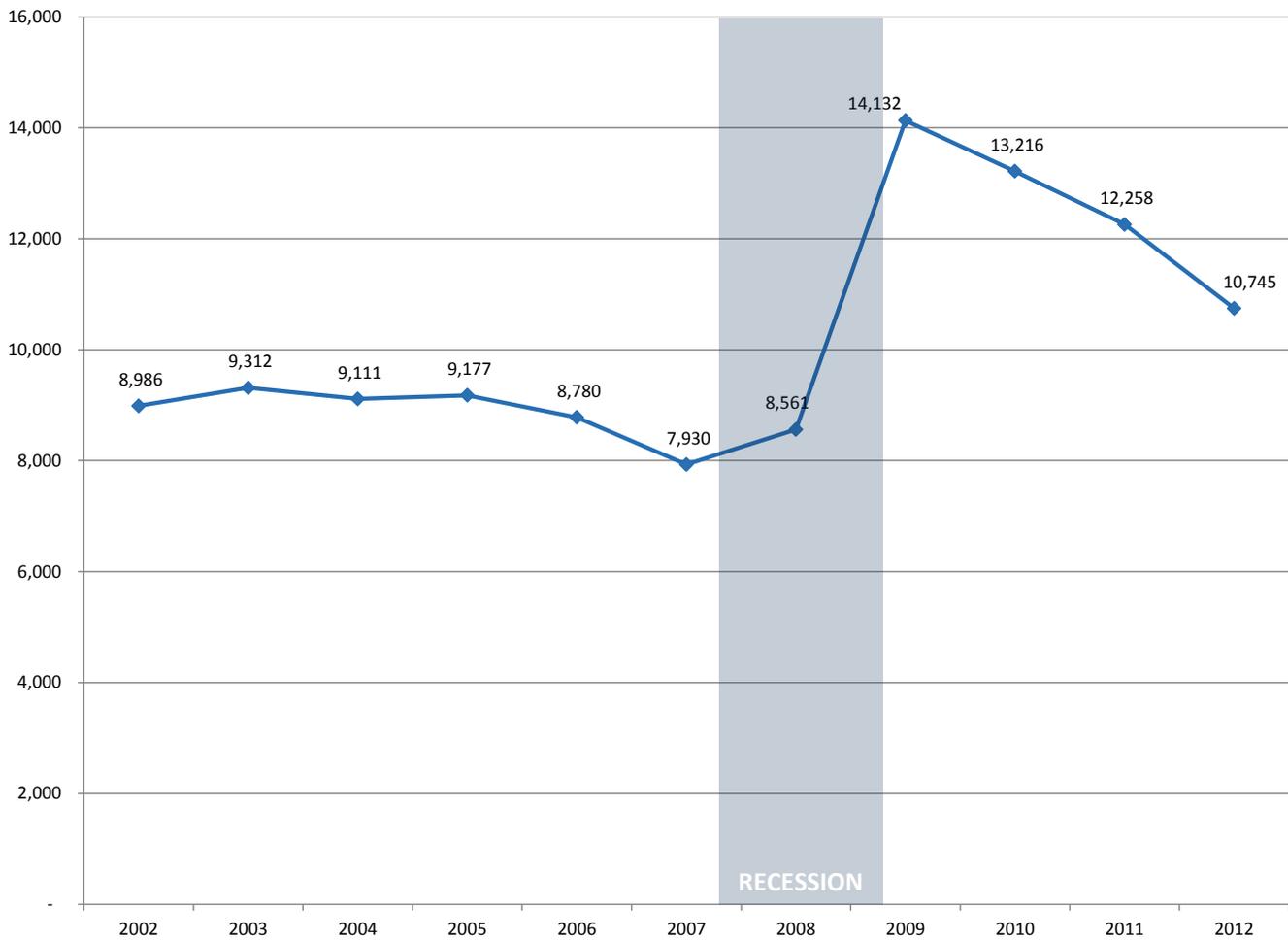
In Figure 6, the recession (officially from December 2007 through June 2009) had a great effect on the labor force. Employment dropped, and unemployment increased by 78 percent.

Figure 6: Employment - 2002-2012



Source: BLS, SCDEW, Local Area Unemployment Statistics (LAUS)

Figure 7: Unemployment - 2002-2012

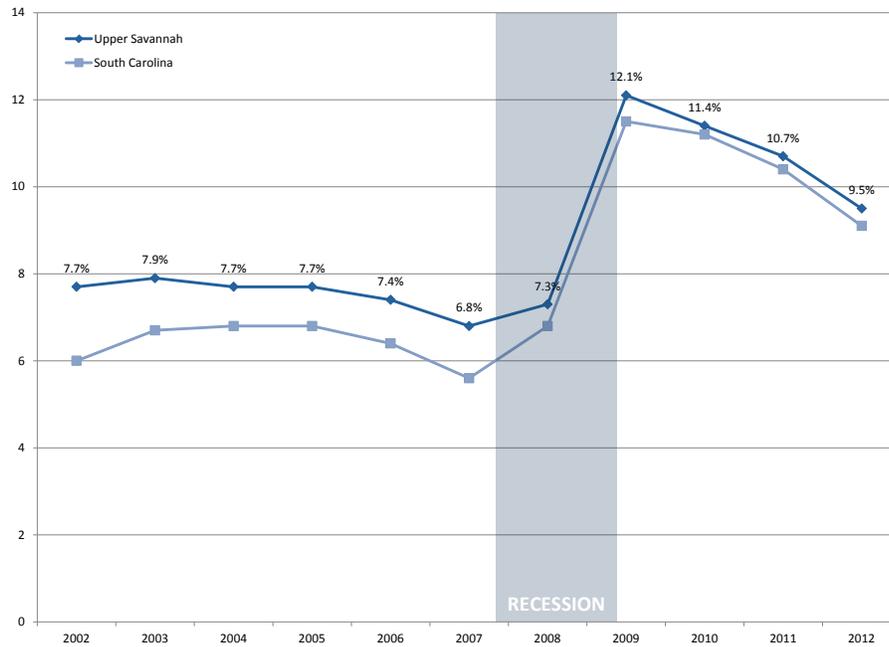


Source: BLS, SCDEW, LAUS

Tracking annual unemployment rates give a good snapshot of the state of an area's workforce. Annual rates smooth out the usual ups and downs of a month-to-month rate (due to normal seasonal or cyclical changes) to give a more accurate picture.

Figure 8 shows the annual rates for the Upper Savannah LWIA area and South Carolina. From 2002 Upper Savannah was consistently above the state's rate. During the recession, the Upper Savannah rate almost doubled from 6.8 percent in 2007 to 12.1 percent in 2009.

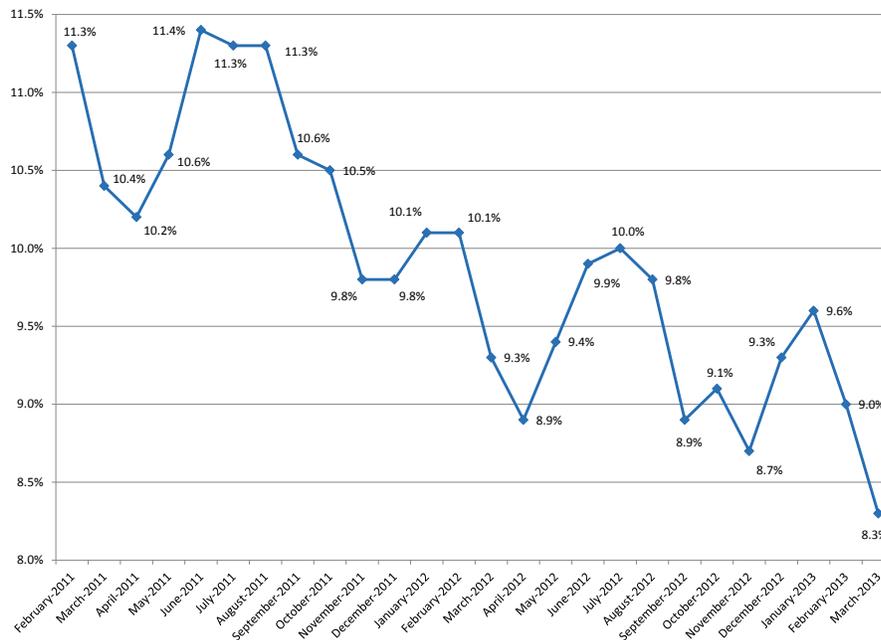
Figure 8: Annual Unemployment - 2002-2012



Source: BLS, SCDEW, LAUS

Figure 9 illustrates that the monthly unemployment rate has seen wide fluctuations since February 2011. The area seems to be slowly recovering from the recession.

Figure 9: Monthly Unemployment Rate - February 2011-March 2013



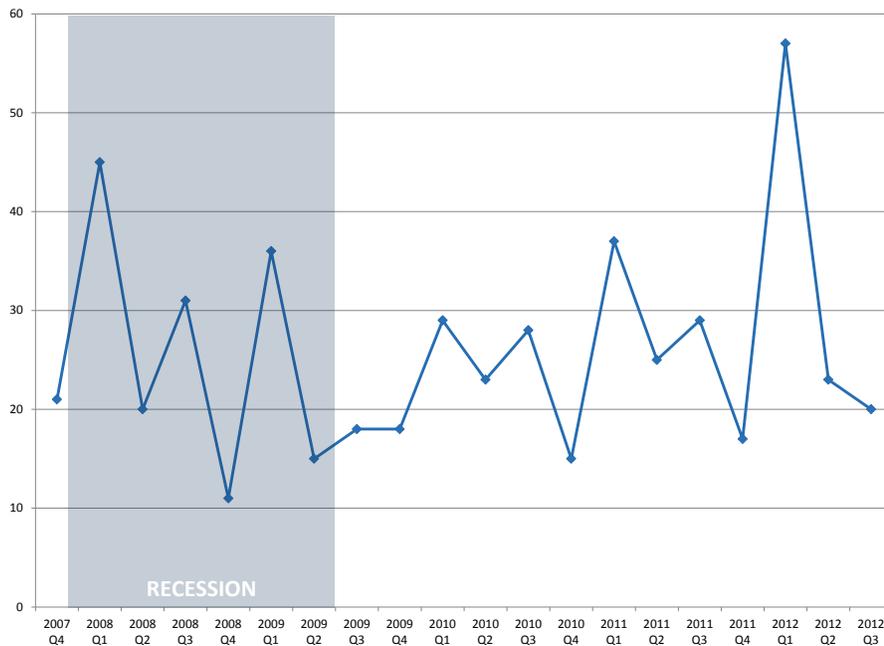
Source: BLS, SCDEW, LAUS

NEW STARTUP FIRMS

One way to see if an economy is improving is to examine data about startup firms. An increase in new companies might be an indicator of expansion in the area, whereas a drop in new firms shows a lack of confidence in the future. (Note: There is almost always a spike in startups in the first quarter

of the year.) Again, the recession had a major impact on normal business births and deaths. Start-ups have been steady in the area with a large increase in early 2012.

Figure 10: New Startup Firms - 2007-2012



Source: BLS, SCDEW, QCEW

EMPLOYERS BY SIZE OF ESTABLISHMENT

By far, the largest category of business size in the area is small business. Small businesses (or establishments) in South Carolina are defined as companies employing 49 or fewer people. The Upper Savannah LWIA as well as South Carolina have 93 percent of establishments designated as small businesses.

Small businesses may need more support and assistance than larger companies because they may not have a designated human resources department or person. They may rely on other resources, such as SC Works Centers, for help with hiring, training, or screening job candidates.

Figure 11: Employers by Size of Establishment - 3rd Quarter 2012

Employees	Upper Savannah	South Carolina
0 to 4	2,074	63,766
5 to 9	794	19,667
10 to 19	524	13,316
20 to 49	370	9,881
50 to 99	150	3,907
100 to 249	96	2,433
250 to 499	27	757
500 to 999	9	328
1000 +	0	264

Source: BLS, SCDEW, QCEW

SUPPLY: WHAT'S OUT THERE?

A manufacturing assembly line needs to have resources and supplies on-hand so that the line does not have to stop. The same is true for the workforce. The supply of workers needs to be of the right quantity and quality to do the job. Is the supply of workers in line with what the companies in the Upper Savannah LWIA need? Seven streams of workforce supply provide an indication: population, commuting, education of the population, clusters of high school students, awards earned at higher education institutions, and characteristics of unemployment insurance claims and claimants.

POPULATION BY AGE

Age distribution in the area is similar to the state and the country with two exceptions. In the 20-39 age cohorts, Upper Savannah has a notably lower proportion of population, and in the 60-79 age cohorts, the LWIA has a markedly higher proportion of population.

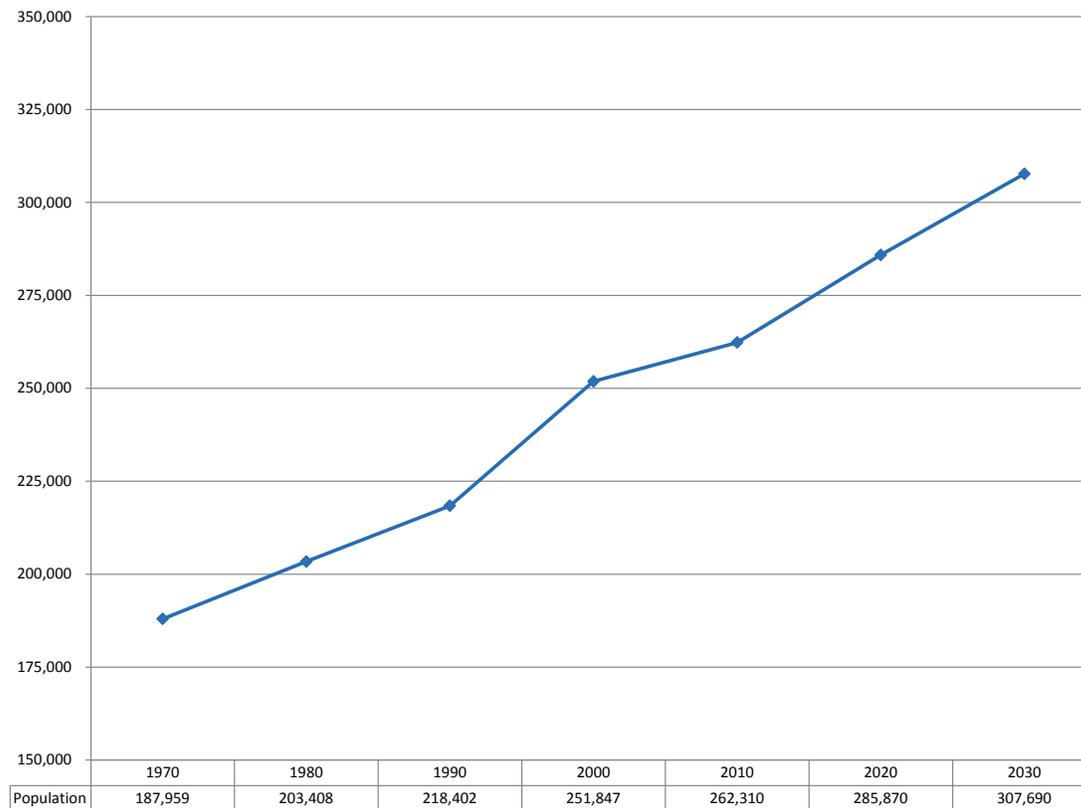
Figure 12: Population by Age

Age Range	Upper Savannah	SC	US
0-4	6.3%	6.5%	6.6%
5-9	6.0%	6.4%	6.6%
10-14	6.5%	6.5%	6.7%
15-19	7.2%	7.2%	7.2%
20-24	6.6%	7.2%	7.0%
25-29	5.9%	6.6%	6.8%
30-34	5.7%	6.2%	6.4%
35-39	5.8%	6.5%	6.6%
40-44	7.2%	6.8%	7.0%
45-49	7.2%	7.2%	7.4%
50-54	7.3%	7.0%	7.2%
55-59	6.5%	6.5%	6.3%
60-64	6.7%	5.9%	5.3%
65-69	5.0%	4.5%	3.9%
70-74	3.6%	3.3%	3.0%
75-79	2.9%	2.5%	2.4%
80-84	2.0%	1.7%	1.9%
85 and older	1.9%	1.5%	1.7%

Source: US Bureau of Census, American Community Survey (ACS)

POPULATION CHANGE AND MIGRATION

Figure 13: Population Projections to 2030



Source: US Census Bureau, Census 2000, SC Department of Health and Environmental Control - Vital Records Department. Population projections calculated by SC Budget and Control Board, Office of Research and Statistics

Figure 14: Population Migration - 2011 - 5-Year Estimate

	Total	Moved From Different State	Moved From Abroad	Moved From Different County	Moved Within Same County
Population 1 year and over	252,358	1.7%	0.3%	4.3%	7.1%
Hispanic or Latino origin (of any race)	12,526	4.7%	3.1%	5.5%	6.2%
White alone, not Hispanic or Latino	159,309	1.7%	0.1%	4.5%	5.7%
Population 25 years and over					
Less than high school graduate	38,047	2.6%	0.7%	3.9%	7.8%
High school graduate/GED	58,705	1.0%	0.2%	3.0%	6.0%
Some college or associate's degree	45,115	1.0%	0.2%	2.7%	4.6%
Bachelor's degree	21,059	2.1%	0.3%	3.4%	3.6%
Graduate or professional degree	9,489	3.2%	0.5%	2.7%	2.7%

Source: US Census Bureau, ACS, SCDEW

After a large jump in population from 1990 to 2000 (up 15.3 percent), the growth of the population of this area slowed down, growing just 4.2 percent over the next 10 years. Growth is projected to increase by less than 1 percent per year to 2030. In Figure 14, in-migration (people moving into Upper Savannah) shows that while over 13 percent of the population changed residence, only 2 percent moved from out of state. Of the residents holding a graduate degree, 3.7 percent came from outside of South Carolina. Nearly 8 percent of Hispanics came from outside of the state and only 1.8 percent of Whites did.

COMMUTING PATTERNS

Most of the workers (65 percent) of Upper Savannah live and work in the LWIA. The tables in Figure 15 show that over 11,000 workers commute in from other areas to work in the LWIA. Greenville County draws a sizeable portion of Upper Savannah County's residents out of the area to work. Nearly 18,000 more employees commute out of the area to work than commute into it every day.

Figure 15: Commuting Patterns - 2010

To Upper Savannah From		From Upper Savannah To	
	11,453		29,363
Greenville County, SC	2,742	Greenville County, SC	8,479
Aiken County, SC	1,724	Lexington County, SC	4,349
Lexington County, SC	1,200	Aiken County, SC	3,893
Anderson County, SC	1,138	Richland County, SC	2,709
		Anderson County, SC	2,273

Source: US Census Bureau, ACS

EDUCATIONAL ATTAINMENT

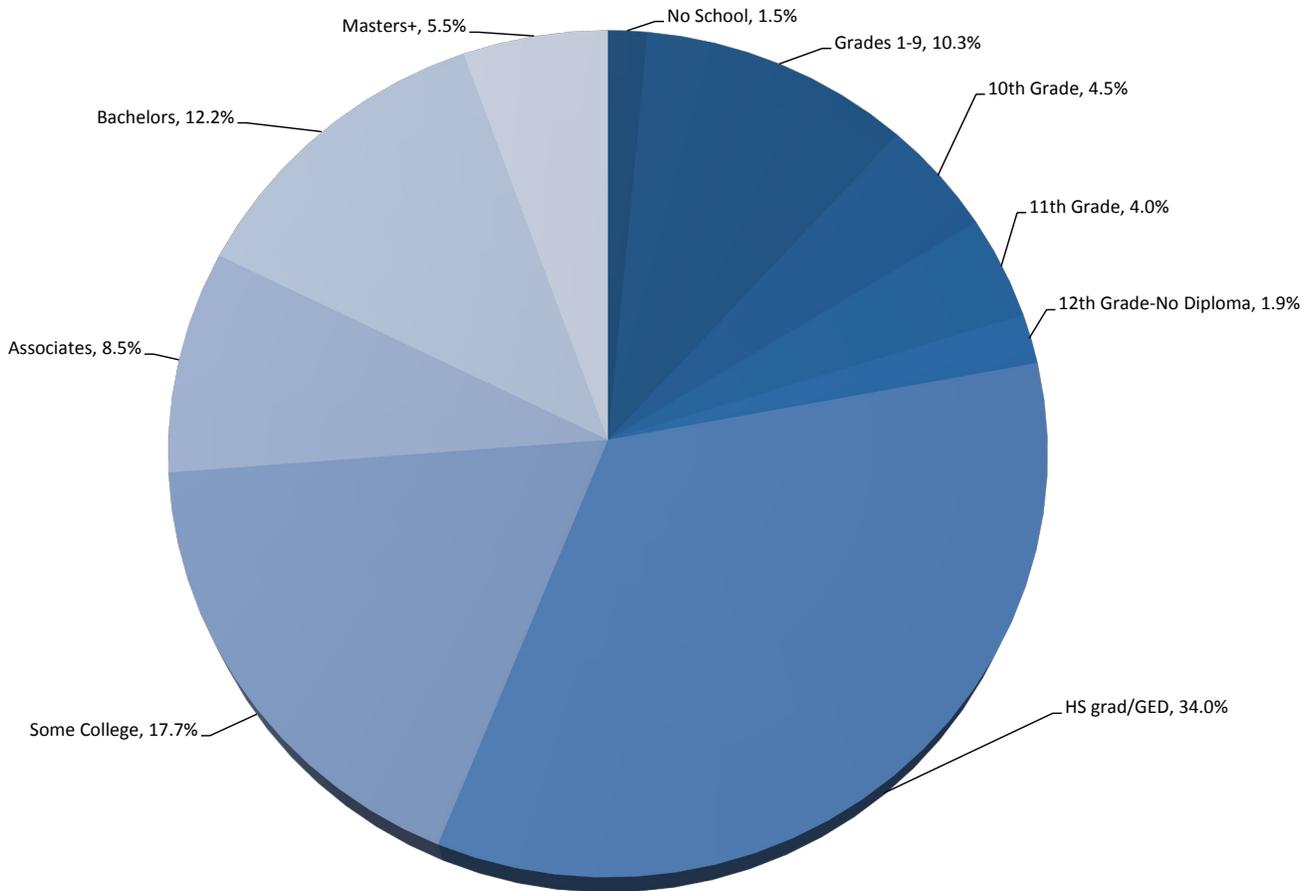
The Upper Savannah LWIA area has a lower percent of residents with college degrees than the state as a whole. The Upper Savannah LWIA has a more than 3 percent higher concentration of residents with a high school diploma or GED than the state. However, the Upper Savannah LWIA has a higher percent of residents with less than a high school diploma or GED.

Figure 16: Educational Attainment - Upper Savannah and South Carolina 2011

Education Level	Upper Savannah	SC
No School	1.5	1.1
Grades 1-9	10.3	7.0
10th Grade	4.5	3.3
11th Grade	4.0	3.2
12th Grade-No Diploma	1.9	1.8
HS grad/GED	34.0	30.9
Some College	17.7	20.1
Associates	8.5	8.4
Bachelors	12.2	15.6
Masters+	5.5	8.6

Source: US Census Bureau, ACS, SCDEW

Figure 17: Educational Attainment - Upper Savannah 2011

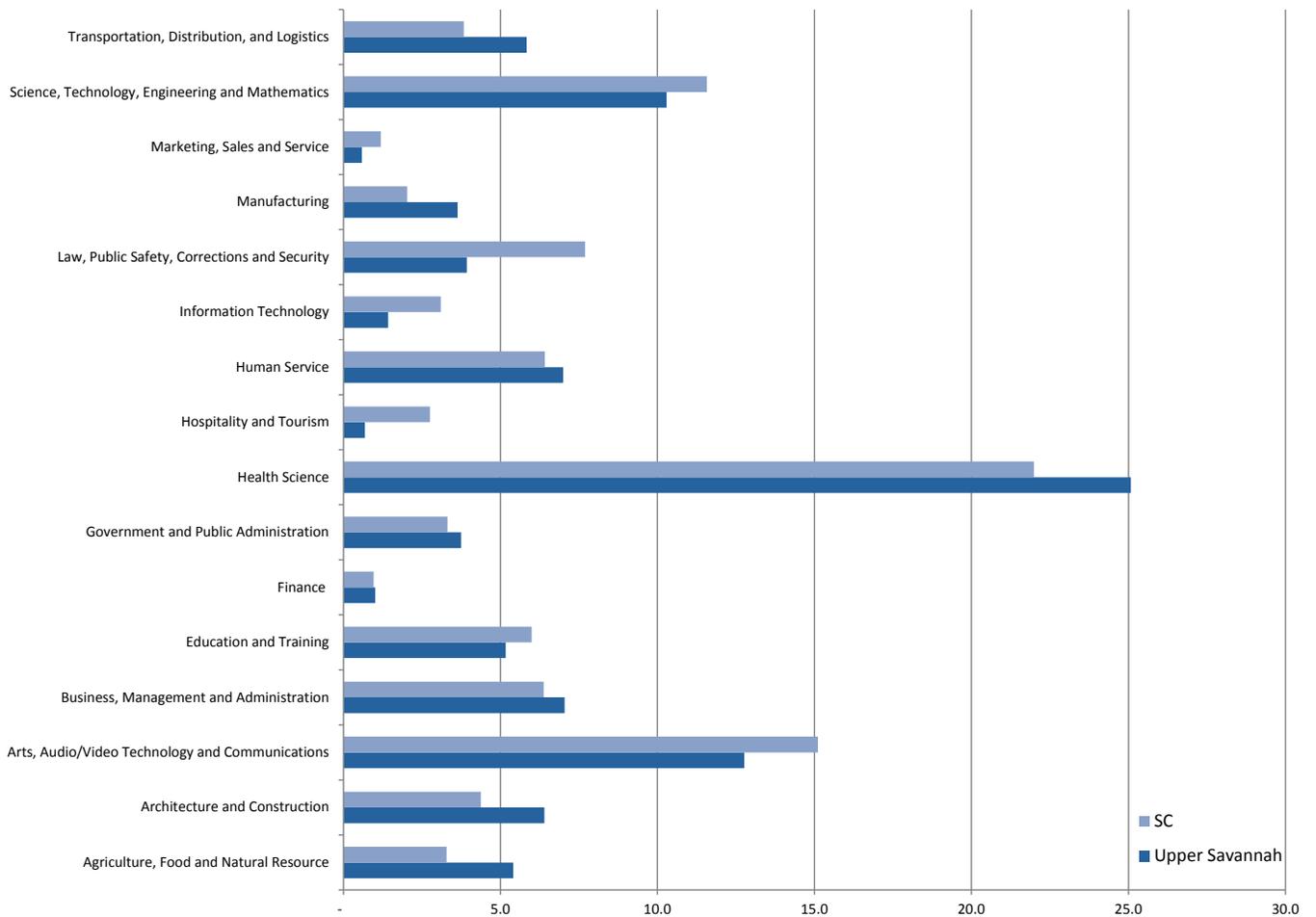


Source: US Census Bureau, ACS, SCDEW

CAREER CLUSTERS SELECTED BY HIGH SCHOOL STUDENTS

Eighth-grade students in South Carolina are required to choose a career cluster to concentrate on to lead them to a post-high school job or college major. There are 16 career clusters.

Figure 18: Percent of Students Declaring a Career Clusters In Upper Savannah and SC - 2012



Note: Declared clusters for students declaring a specific cluster on their primary Electronic Individual Graduation Plan (e-IGP) for 2011-2012 year

Source: SC Department of Education

Many students in the Upper Savannah area have chosen the Health Science career cluster in response to news of a shortage of healthcare workers in South Carolina. In keeping with the state trend, the area’s students also picked the Arts, Audio/Video Technology and Communications cluster and the Science, Technology, Engineering and Math (STEM) cluster.

Figure 19: Career Clusters - 2012

Cluster	Upper Savannah	SC
Agriculture, Food and Natural Resource	5.4	3.3
Architecture and Construction	6.4	4.4
Arts, Audio/Video Technology and Communications	12.8	15.1
Business, Management and Administration	7.0	6.4
Education and Training	5.2	6.0
Finance	1.0	1.0
Government and Public Administration	3.7	3.3
Health Science	25.1	22.0
Hospitality and Tourism	0.7	2.8
Human Service	7.0	6.4
Information Technology	1.4	3.1
Law, Public Safety, Corrections and Security	3.9	7.7
Manufacturing	3.6	2.0
Marketing, Sales and Service	0.6	1.2
Science, Technology, Engineering and Mathematics	10.3	11.6
Transportation, Distribution, and Logistics	5.8	3.8

Source: SC Department of Education

DEGREES AWARDED

In higher education, Upper Savannah area colleges and universities have conferred a wide variety of awards. Of the top 20, Business Administration and Liberal Arts are the most popular followed by Registered Nursing. The institutions included in this data are Erskine College, Lander University, Newberry College, Piedmont Technical College, Presbyterian College, and USC-Union at Laurens.

Figure 20: Top 20 Majors in Upper Savannah - 2011

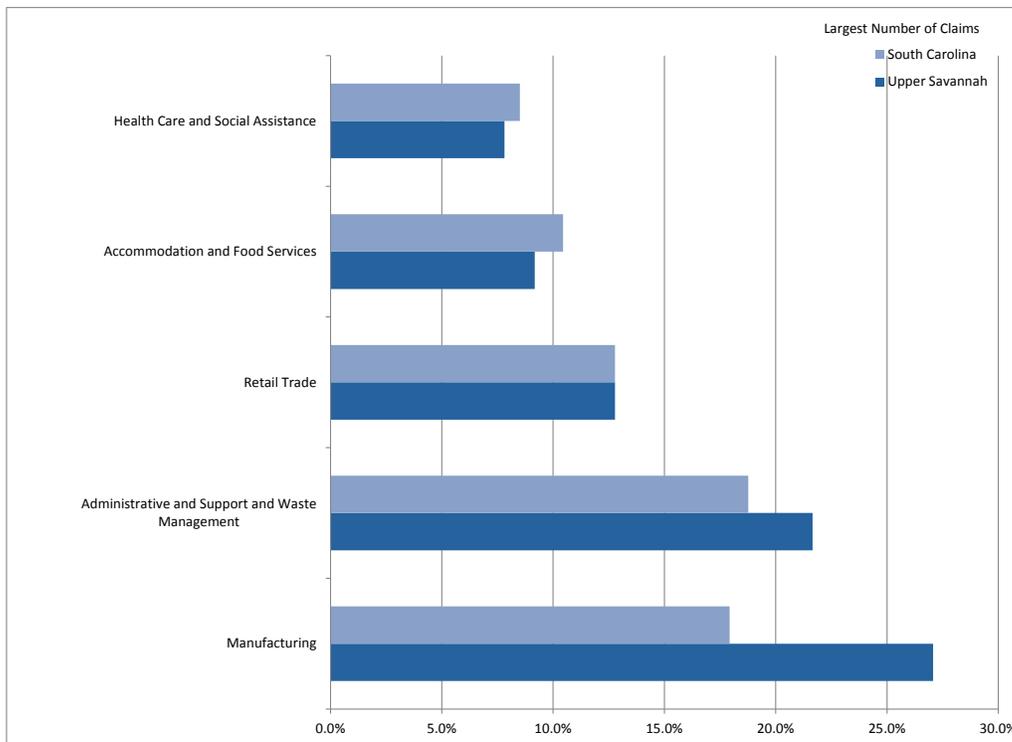
Majors	
Business Administration and Management, General	230
Liberal Arts and Sciences/Liberal Studies	139
Registered Nursing/Registered Nurse	122
Biology/Biological Sciences, General	84
History, General	74
Administrative Assistant and Secretarial Science	71
Business/Commerce, General	67
Nursing - Registered Nurse Training, BSN Generic	55
Construction Engineering Technology/Technician	54
Welding Technology/Welder	51
Licensed Practical/Vocational Nurse Training	50
Psychology, General	49
Social Work	46
Early Childhood Education and Teaching	45
Political Science and Government, General	45
Automobile/Automotive Mechanics Technology	42
Criminal Justice/Safety Studies	42
Sociology	41
Elementary Education and Teaching	40
Electromechanical & Instrumentation & Maintenance	38

Source: SC Commission on Higher Education, http://www.che.sc.gov/New_Web/Data&Pubs.htm

CHARACTERISTICS OF UI CLAIMS BY OCCUPATION

Another source of supply for the workforce is people who are receiving unemployment compensation. In the Upper Savannah LWIA area, most claims filed are in the Manufacturing (or Production) group. This is in line with the areas industry concentration of manufacturing companies.

Figure 21: Characteristics of UI Claims by Occupation - April 2013



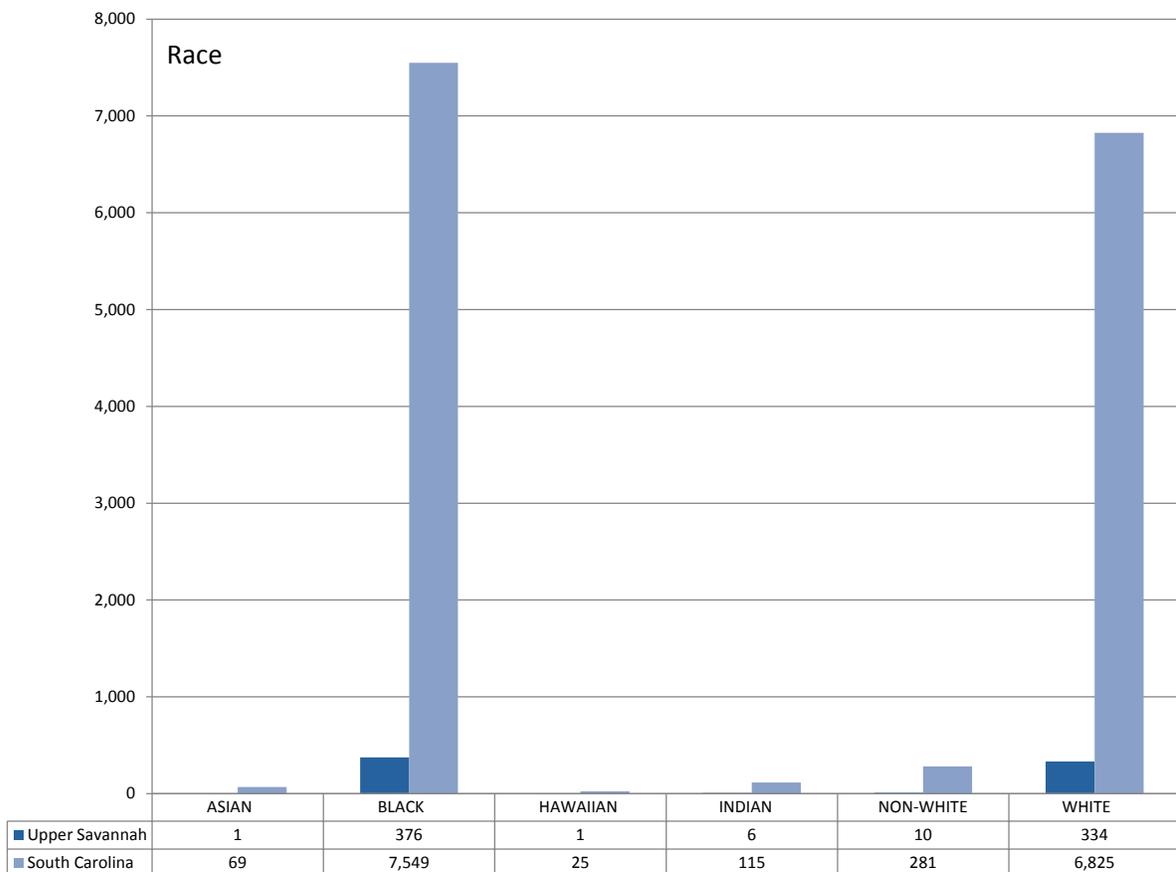
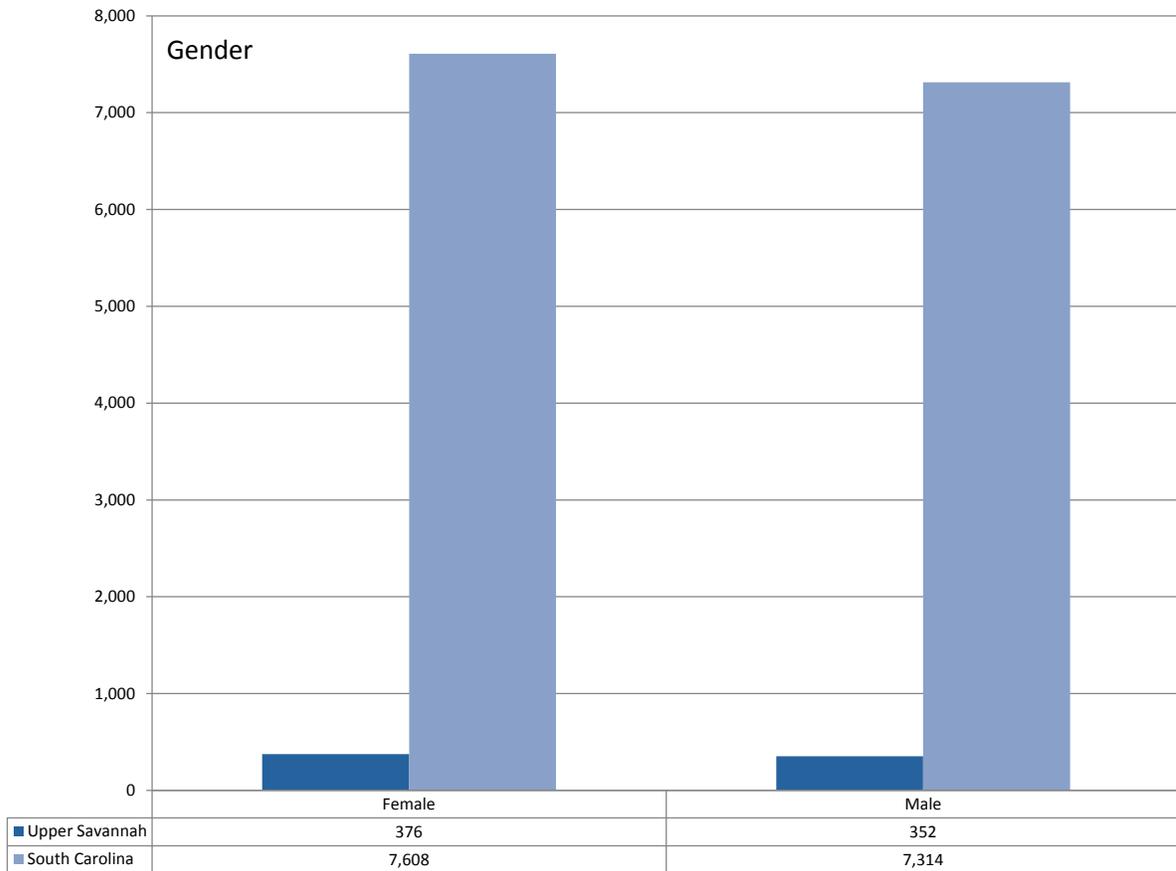
Occupation	Upper Savannah	South Carolina
Manufacturing	180	2,267
Administrative and Support and Waste Management	144	2,373
Retail Trade	85	1,616
Accommodation and Food Services	61	1,321
Health Care and Social Assistance	52	1,076
Construction	31	820
Professional, Scientific, and Technical Services	26	698
Wholesale Trade	16	445
Other Services (except Public Administration)	16	292
Public Administration	12	206
Finance and Insurance	11	300
Transportation and Warehousing	7	414
Educational Services	7	222
Agriculture, Forestry, Fishing and Hunting	5	98
Information	4	122
Real Estate and Rental and Leasing	3	213
Arts, Entertainment, and Recreation	2	94
Mining, Quarrying, and Oil and Gas Extraction	1	10
Utilities	1	22
Management of Companies and Enterprises	1	35

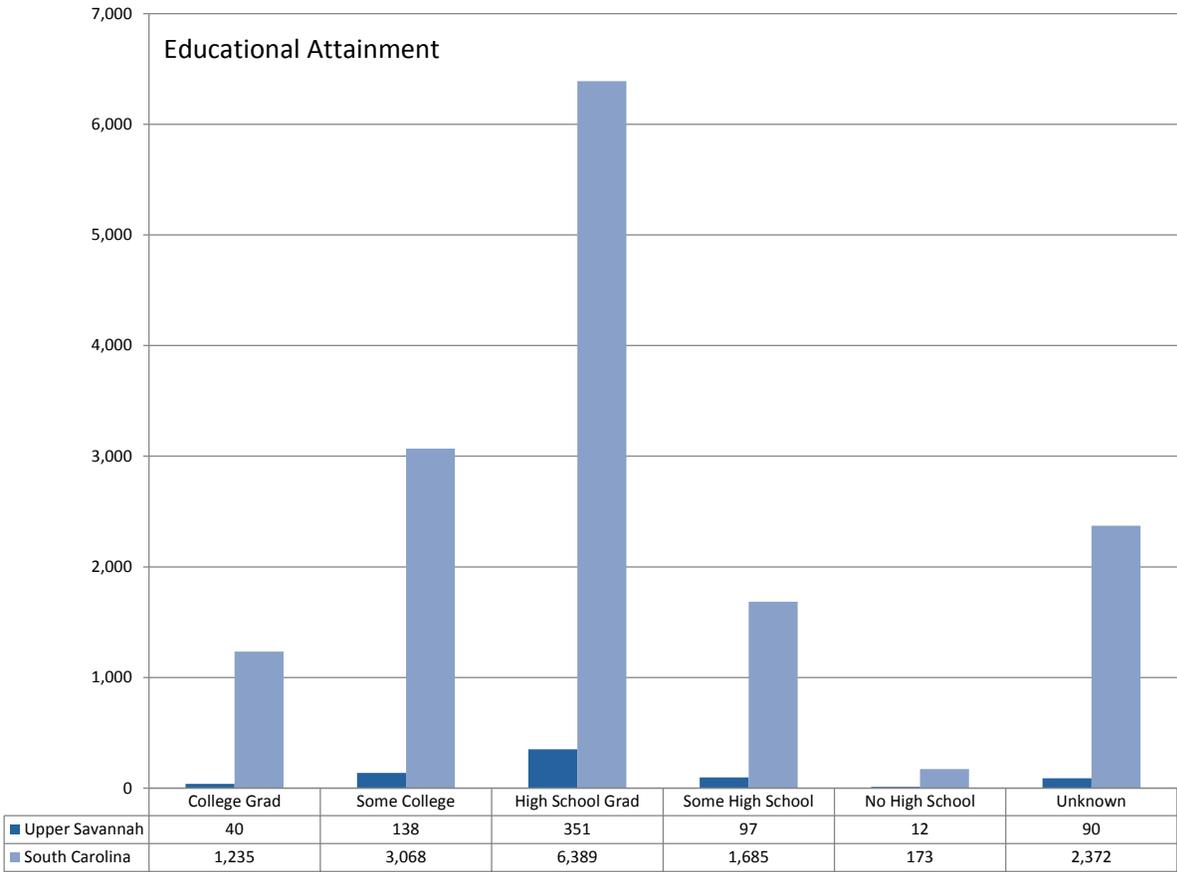
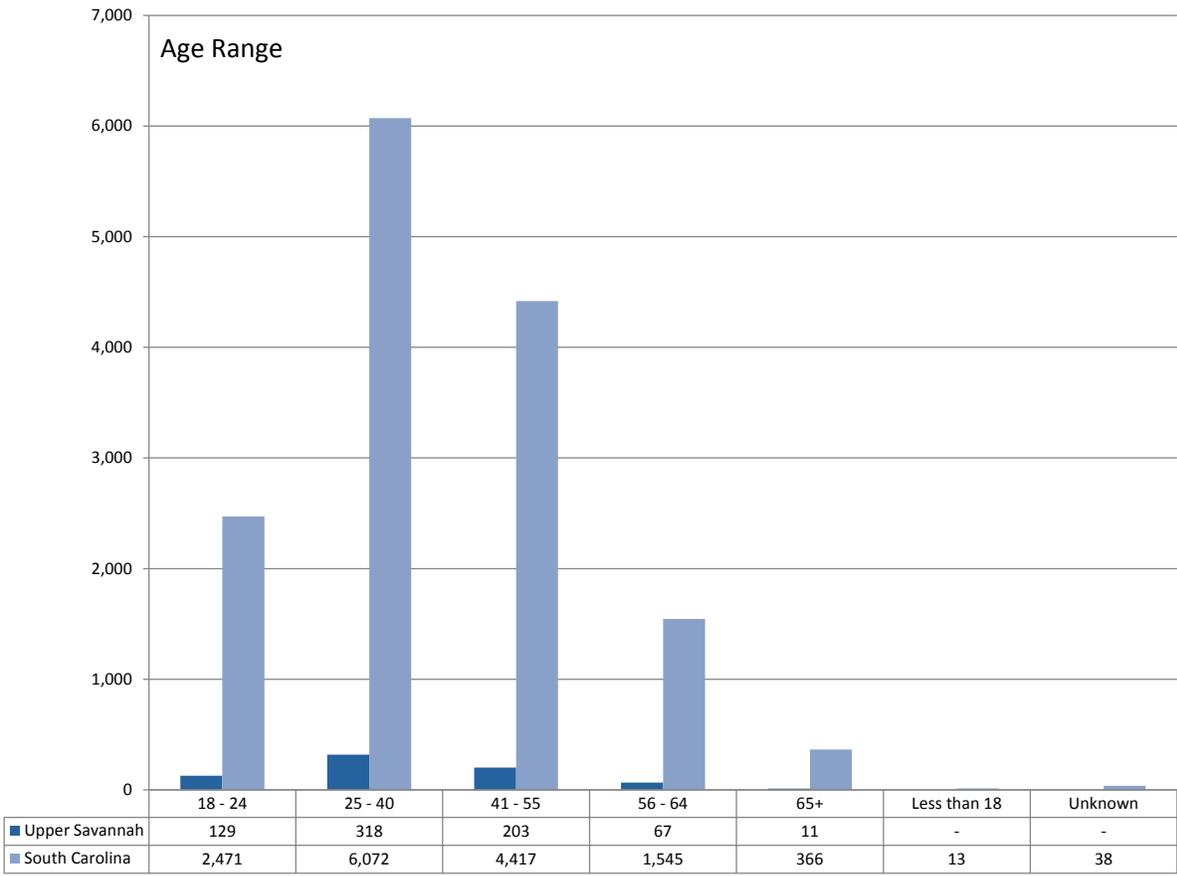
Source: SCDEW

UNEMPLOYMENT INSURANCE CLAIMANT CHARACTERISTICS

The people in this area who were receiving unemployment insurance benefits in April 2013 were typically female, black, 25-40 years old, and were high school graduates or earned a GED.

Figure 22: UI Claimant Characteristics - April 2013





Source: SCDEW

DEMAND: WHAT DO WE NEED?

Workforce demand shows what is needed in an area to support current and future employers. This section examines current (real-time) demand through online job advertisements, industry and occupational projections to 2018, educational requirements for future jobs, and the skills needed for those occupations.

Online job advertisements give a snapshot of what positions need to be filled in an area. The data is from the Conference Board Help Wanted OnLine® Data Series (HWOL) which measures the number of new and reposted job ads from over 16,000 Internet job boards. In April 2013, the largest occupational group with job ads in the Upper Savannah LWIA was Healthcare Practitioners and Technical Occupations followed by Architecture and Engineering Occupations.

ONLINE JOB ADVERTISEMENTS

Figure 23: Upper Savannah HWOL - April 2013 by Major Group

Occupation	# of Job Ads
Healthcare Practitioners and Technical Occupations	362
Architecture and Engineering Occupations	113
Production Occupations	109
Sales and Related Occupations	101
Food Preparation and Serving Related Occupations	77
Management Occupations	75
Installation, Maintenance, and Repair Occupations	71
Office and Administrative Support Occupations	67
Healthcare Support Occupations	59
Transportation and Material Moving Occupations	52
Business and Financial Operations Occupations	39
Computer and Mathematical Occupations	21
Arts, Design, Entertainment, Sports, and Media Occupations	17
Protective Service Occupations	14
Community and Social Services Occupations	13
Education, Training, and Library Occupations	12
Building and Grounds Cleaning and Maintenance Occupations	8
Personal Care and Service Occupations	7
Legal Occupations	6
Life, Physical, and Social Science Occupations	6
Construction and Extraction Occupations	5
Farming, Fishing, and Forestry Occupations	3
Military Specific Occupations	1

Note: A job advertisement may include multiple openings.

Source: The Conference Board Help Wanted OnLine® Data Series (HWOL)

INDUSTRY PROJECTIONS

The Health Care and Social Assistance industry is projected to have the largest growth from 2008 to 2018, growing by 1,146 jobs or 115 openings/year. This sector includes services, such as ambulatory health care services, hospitals, nursing and residential care facilities, and social assistance services. Administrative and Support and Waste Management and Remediation Services reports the next largest growth with a projected 63 openings/year. This sector includes office administrative services, facilities support services, employment services, services to buildings and dwellings, and waste collection, treatment, and disposal services.

Figure 24: Industry Projections - 2008-2018

Industry	Estimate Employment (2008)	Projected Employment (2018)	Change	Percent Change	Annual Percent Change
Manufacturing	21,776	22,321	545	2.50	0.25
Health Care and Social Assistance	9,911	11,057	1,146	11.56	1.10
Government	8,876	9,098	222	2.50	0.25
Educational Services	7,997	8,535	538	6.73	0.65
Retail Trade	7,683	7,789	106	1.38	0.14
Accommodation and Food Services	4,945	5,180	235	4.75	0.47
Construction	3,493	3,675	182	5.21	0.51
Administrative and Support and Waste Management and Remediation	2,971	3,599	628	21.14	1.94
Agriculture, Forestry, Fishing and Hunting	4,280	3,479	-801	-18.72	-2.05
Other Services (Except Government)	3,213	3,049	-164	-5.10	-0.52
Transportation and Warehousing	2,578	2,567	-11	-0.43	-0.04
Wholesale Trade	1,392	1,964	572	41.09	3.50
Professional, Scientific, and Technical Services	1,268	1,409	141	11.12	1.06
Finance and Insurance	1,390	1,366	-24	-1.73	-0.17
Arts, Entertainment, and Recreation	838	862	24	2.86	0.28
Information	725	828	103	14.21	1.34
Real Estate and Rental and Leasing	390	442	52	13.33	1.26
Management of Companies and Enterprises	281	303	22	7.83	0.76
Utilities	260	224	-36	-13.85	-1.48

Source: BLS, SCDEW, QCEW, WI

OCCUPATIONAL PROJECTIONS

Many of the occupations projected to have numerous openings between 2008 and 2018 in this area are jobs that have high turnover due to low wages. Occupations like Slaughterers and Meat Packers and Taxi Drivers and Chauffeurs do not require extensive education, therefore the pay is low. The need for increased health services (for the aging Baby Boomers) puts Registered Nurses at the top of the projections list as well as other healthcare-related jobs, such as Pharmacists and Pharmacy Technicians, as shown in Figure 25.

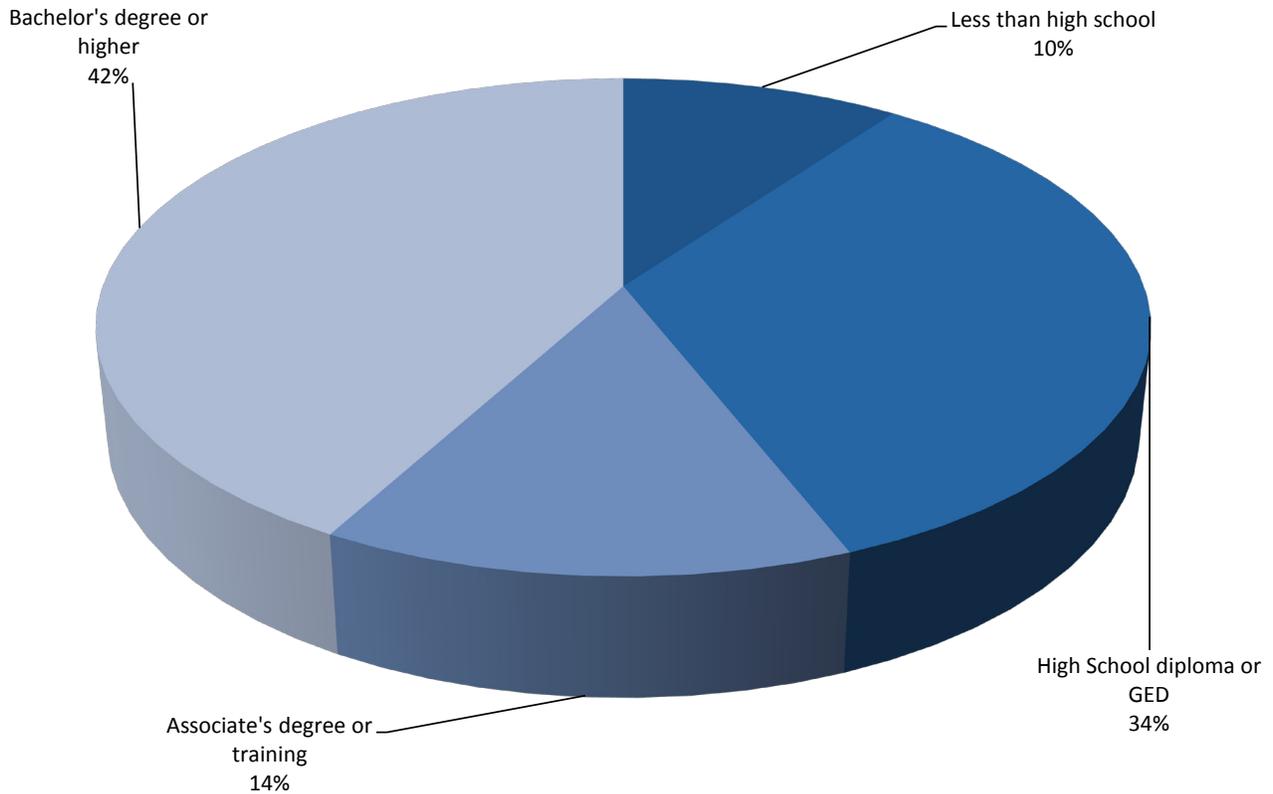
Figure 25: Growing Occupations - 2008-2018

Occupation	Estimated Employment (2008)	Projected Employment (2018)
Registered Nurses	1,427	1,725
Slaughterers and Meat Packers	793	1,084
Medical Assistants	310	363
Pharmacy Technicians	251	331
Pharmacists	220	267
Woodworking Machine Setters, Operators, and Tender	206	259
Sawing Machine Setters, Operators & Tenders, Wood	142	170
Coating, Painting, and Spraying Machine Setters	133	158
Surgical Technologists	97	122
Electrical Engineers	100	122
Compliance Officers, Except Agriculture, Construction	88	107
Public Relations Specialists	71	87
Physical Therapist Assistants	65	79
Pipelayers	58	70
Taxi Drivers and Chauffeurs	39	49
Computer and Information Systems Managers	36	43
Athletic Trainers	30	38
Advertising Sales Agents	32	38
Log Graders and Scalers	22	32
Occupational Health and Safety Specialists	16	19

Source: BLS, SCDEW, OES, WI

Of the top 50 projected growing occupations by percent change, 17 require a high school diploma or GED, five require less than a high school diploma or GED, 21 require a bachelor's degree, seven have an associate's degree or require some kind of postsecondary training. Each of the five requiring less than a high school diploma or GED does require at least short-term on-the-job training (OJT), which is defined by the US Department of Labor as less than one month.

Figure 26: Education for Top 50 Projected Occupations



Source: BLS, SCDEW, OES, WI

It is just as important to know which occupations are declining in the area. Declines are often due to technological advances (i.e. computers or robots replacing humans), so many of the declining occupations are projected to be in textile manufacturing and administration.

Figure 27: Top 20 Projected Declining Occupations in Upper Savannah - 2008-2018

Occupation
Child Care Workers
Data Entry Keyers
Electrical and Electronics Repairers
Fallers
File Clerks
Helpers--Production Workers
Human Resources Assistants, Except Payroll and Time
Industrial Engineering Technicians
Inspectors, Testers, Sorters, Samplers & Weighers
Maintenance Workers, Machinery
Meter Readers, Utilities
Order Clerks
Packers and Packagers, Hand
Payroll and Timekeeping Clerks
Postal Service Clerks
Postal Service Mail Sorters, Processors
Postmasters and Mail Superintendents
Roofers
Switchboard Operators, Including Answering Service
Textile Knitting and Weaving Machine Setters, Operators

Source: BLS, SCDEW, OES, WI

SKILLS OF PROJECTED OCCUPATIONS

Using the top 50 projected growing occupations, the skill levels needed for the future workforce based on the definitions given earlier in this report can be categorized.

Figure 28: Skill Levels

Low	9
Middle	20
High	21

Source: BLS, SCDEW, OES, WI

Low-skilled jobs often have commensurate (i.e. low) pay and do not require much education, experience, or OJT. Does the supply of workers have the right skills for the jobs in the future?

WORKFORCE CHALLENGES

The current economic situation in the Upper Savannah LWIA, the supply of workers, and the characteristics of workers who will be in demand has been reviewed. What can be gleaned from these findings? Are there gaps between supply and demand?

Supply Findings

With the population growing slowly until 2030 and a smaller-than-the-state share of 20-39 year olds, this area looks to have a challenge in having a supply of workers. In addition, in-migration from other states/countries adds residents primarily at the bottom end of the educational spectrum, though some are concentrated at the upper end. This is evident in the overall educational attainment of residents 25 years and older: a higher percent of residents with less than a high school diploma than the state as a whole. Upper Savannah LWIA also exceeds the state with a higher proportion of its residents having a high school diploma/GED or associate's degree.

Many high school students selected the Health Science career cluster in keeping with state trends. The next most popular career cluster was Arts, Audio/Video/Technology, and Communications.

Demand Findings

Employer demand was consistent between online advertisements (current) and 2018 projected occupations (long-term needs) in general. Among the leaders by the need for workers were Business, Management, and Administration; Health Science; and Marketing, Sales, and Service. Hospitality and Tourism and Manufacturing were long-term demands. Most of the top projected occupations require at least a high school diploma or GED.

Figure 29: Comparison of Supply and Demand

	Demand		Supply	
	Top online ads	Projected Occupations	Degrees Earned	Career Clusters Selected
Agriculture, Food and Natural Resource	1.7	4.0	1.0	5.4
Architecture and Construction	5.4	5.9	4.4	6.4
Arts, Audio/Video Technology and Communications	1.1	0.8	3.8	12.8
Business, Management and Administration	12.1	14.5	17.6	7.0
Education and Training	1.5	3.1	17.4	5.2
Finance	3.2	1.6	0.0	1.0
Government and Public Administration	0.2	0.3	2.0	3.7
Health Science	31.7	11.6	20.6	25.1
Hospitality and Tourism	3.5	13.2	0.0	0.7
Human Service	2.9	5.6	8.7	7.0
Information Technology	4.0	0.7	2.2	1.4
Law, Public Safety, Corrections and Security	1.1	3.2	1.9	3.9
Manufacturing	5.1	14.6	7.8	3.6
Marketing, Sales and Service	15.3	12.4	0.0	0.6
Science, Technology, Engineering and Mathematics	5.2	1.8	10.5	10.3
Transportation, Distribution, and Logistics	5.9	6.7	1.9	5.8

Source: BLS, SCDEW, WI, SC Department of Education, OES, HWOL

A few observations about the comparison that could be considered challenges to the workforce pipeline include:

- The short- and long-term employment demand in Marketing, Sales and Service will not be met by today's graduates or tomorrow's students.
- There are many post-secondary degrees being earned in Business, Management and Administration; Education and Training; Human Service; and Science, Technology, Engineering and Mathematics for which there is no demand. Possibly the glut in Business graduates could help supply the need for workers in Marketing, Sales and Service and Finance.
- The short-term demand for workers in Transportation, Distribution, and Logistics is not being met by today's graduates.
- Demand for Health Science workers is greater than supply of degree-holders in the short-term, but just the opposite situation exists in the long-term as eighth graders chose the field at a rate of more than double the projection.
- There is an overabundance of Arts, Audio/Video Technology and Communication and STEM clusters selected by students that will far outpace long-term demand.
- The long-term demand for workers in Business, Management and Administration; Hospitality and Tourism; and Manufacturing is not projected to be met by today's students.

There is always a demand for employees with soft skills. It is said that hard skills (training, degrees, or certification) get you hired, but soft skills get you fired. Many of our residents need to learn or get a refresher in soft skills in order to KEEP their jobs. Employers see the need.

Top 10 Soft Skills Found in Online Ads for South Carolina (April 2013)

1. Oral and written communication skills
2. Customer service oriented
3. Problem solving
4. Detail oriented
5. Microsoft Office
6. Self-starting / Self-motivated
7. Organizational skills
8. Troubleshooting
9. Work independently
10. Sales experience

Source: *The Conference Board Help Wanted OnLine*® Data Series (HWOL)

CONCLUSION

The workforce (current and potential) in the Upper Savannah LWIA area faces several challenges. The population continues to increase slowly, and the education level for the population is lower than the state as a whole with lower percentages of residents with education beyond high school. There are high levels of employers advertising for jobs in business, management, marketing, and sales, and health care. However, some supply flows could be fine-tuned to be more in line with demand.

The data shows that:

- There is an undersupply of students choosing Business, Management and Administration; Hospitality and Tourism; Manufacturing; and Marketing, Sales and Service studies to meet the area's future demand.
- There is an oversupply of students choosing Arts, Audio/Video Technology and Communication; STEM; and Health Sciences that will far outpace future employment demand in the LWIA.
- Comprehensive soft skills training is needed for all students and job seekers (high school, post-secondary, adult, new and returning entrants to the labor force, and incumbent workers) so that they can not only get hired but retain their positions and thus reduce employee turnover.

Getting education more in line with the demands of employers will help the Upper Savannah LWIA meet the challenges it faces.

UPSTATE LWIA WORKFORCE REPORT 2012



The *Upstate Workforce Report* is published by the Labor Market Information (LMI) Department of the South Carolina Department of Employment and Workforce. The information and analyses provided in this publication are based on data collected from sources throughout South Carolina and the United States.

About SC DEW and LMI:

The Labor Market Information Department compiles and publishes employment statistics, job forecasts, wage data, demographics, and other labor market information to help public and private organizations, researchers, and others better understand today's complex workforce.

The LMI Department produced this report under the leadership of:

Executive Director - Cheryl Stanton
Interim Deputy Assistant Executive Director - Kerry Paul
Labor Market Information Director - Brenda Lisbon

South Carolina Department of Employment and Workforce
1550 Gadsden Street
Columbia, South Carolina 29201
(803) 737-2660
www.dew.sc.gov
www.scworkforceinfo.com



TABLE OF CONTENTS

EXECUTIVE SUMMARY	VI
INTRODUCTION	VII
ECONOMIC DISCUSSION: A CURRENT PICTURE OF THE WORKFORCE	1
EMPLOYMENT BY INDUSTRY	1
LOCATION QUOTIENT	1
AVERAGE ANNUAL WAGE BY INDUSTRY	2
OCCUPATIONAL EMPLOYMENT	3
SKILLS DATA.....	4
EMPLOYMENT AND UNEMPLOYMENT	6
NEW STARTUP FIRMS	8
EMPLOYERS BY SIZE OF ESTABLISHMENT	9
SUPPLY: WHAT'S OUT THERE?	10
POPULATION BY AGE	10
POPULATION CHANGE AND MIGRATION	11
COMMUTING PATTERNS	12
EDUCATIONAL ATTAINMENT	12
CAREER CLUSTERS SELECTED BY HIGH SCHOOL STUDENTS	13
DEGREES AWARDED	15
CHARACTERISTICS OF UI CLAIMS BY OCCUPATION	16
UNEMPLOYMENT INSURANCE CLAIMANT CHARACTERISTICS.....	17
DEMAND: WHAT DO WE NEED?	20
ONLINE JOB ADVERTISEMENTS.....	20
INDUSTRY PROJECTIONS	20
OCCUPATIONAL PROJECTIONS	21
SKILLS OF PROJECTED OCCUPATIONS	24
WORKFORCE CHALLENGES	25
CONCLUSION	27

TABLE OF FIGURES

FIGURE 1: UPSTATE LWIA EMPLOYMENT BY INDUSTRY - 3RD QUARTER 2012.....	1
FIGURE 2: NOTABLE UPSTATE LWIA LOCATION QUOTIENTS - 2011	2
FIGURE 3: ANNUAL AVERAGE WAGE BY INDUSTRY - 3RD QUARTER 2012.....	3
FIGURE 4: TOP 20 OCCUPATIONS WITH WAGES - 2012.....	4
FIGURE 5: TOP OCCUPATIONS BY SKILL CLASSIFICATION - UPSTATE 2012	5
FIGURE 6: EMPLOYMENT - 2002-2012.....	6
FIGURE 7: UNEMPLOYMENT - 2002-2012	7
FIGURE 8: ANNUAL UNEMPLOYMENT - 2002-2012	8
FIGURE 9: MONTHLY UNEMPLOYMENT RATE - MARCH 2011-APRIL 2013.....	8
FIGURE 10: NEW STARTUP FIRMS - 2007-2012.....	9
FIGURE 11: EMPLOYERS BY SIZE OF ESTABLISHMENT - 3RD QUARTER 2012.....	9
FIGURE 12: POPULATION BY AGE	10
FIGURE 13: POPULATION PROJECTIONS TO 2030.....	11
FIGURE 14: POPULATION MIGRATION - 2011 - 5-YEAR ESTIMATE.....	11
FIGURE 15: COMMUTING PATTERNS - 2010.....	12
FIGURE 16: EDUCATIONAL ATTAINMENT - UPSTATE AND SOUTH CAROLINA 2011	12
FIGURE 17: EDUCATIONAL ATTAINMENT - UPSTATE 2011.....	13
FIGURE 18: PERCENT OF STUDENTS DECLARING A CAREER CLUSTERS IN UPSTATE AND SC - 2012.....	14
FIGURE 19: CAREER CLUSTERS - 2012.....	15
FIGURE 20: TOP 20 MAJORS IN UPSTATE - 2011.....	16
FIGURE 21: CHARACTERISTICS OF UI CLAIMS BY OCCUPATION - APRIL 2013.....	17
FIGURE 22: UI CLAIMANT CHARACTERISTICS - APRIL 2013.....	18
FIGURE 23: UPSTATE HWOL - APRIL 2013 BY MAJOR GROUP.....	20
FIGURE 24: INDUSTRY PROJECTIONS - 2008-2018	21
FIGURE 25: GROWING OCCUPATIONS - 2008-2018.....	22
FIGURE 26: EDUCATION FOR TOP 50 PROJECTED OCCUPATIONS	23
FIGURE 27: TOP 20 PROJECTED DECLINING OCCUPATIONS IN UPSTATE - 2008-2018	24
FIGURE 28: SKILL LEVELS.....	24
FIGURE 29: COMPARISON OF SUPPLY AND DEMAND.....	25

EXECUTIVE SUMMARY

The employment leaders for Upstate Local Workforce Investment Area (LWIA) are Manufacturing and Health Care and Social Assistance. Employment growth is anticipated by 2018 in several industries, especially Health Care and Social Assistance and Accommodation and Food Service. The highest wages are paid by the Management of Companies and Utilities industries.

The LWIA's population grew by under one percent per year since 2000, and it has fewer residents aged 20 to 34 than the state's average.

Employment is rising, and unemployment is declining. The LWIA has a historically higher unemployment rate than the state, and it remained so during and after the recession. Employment is concentrated in the Spartanburg area, and nearly 3,400 more people enter the LWIA for work than leave it every day. Manufacturing is the largest industry represented in unemployment claims. This industry includes apparel; plastics and rubber products; and transportation equipment fabrication.

Upstate has a lower proportion of residents with a bachelor's degree or higher than the state does as a whole. For projected future jobs, 32 percent require no diploma, 36 percent require a diploma and training, 14 percent require an associate's degree or vocational training, and 18 percent require a bachelor's degree or more.

Upstate LWIA businesses desire a trained workforce with the current focus being on manufacturing-specific certifications, like Computer Numerical Control machining and welding. Although many manufacturing firms are willing to train their workers, there exists a perception gap between current and former manufacturing techniques, opportunities, and environments. A challenge for the LWIA is to match the skill levels of the workforce with open positions. There may be a mismatch between the employer's skill demands and the occupations that the worker will accept.

A highly trained and educated workforce is an important part of attracting further economic growth to the Upstate LWIA. It allows companies to bring many aspects of their operations into a single area (manufacturing, administrative, distribution), increasing local employment and lowering the distance between functional units.

Upstate LWIA has several factors working in its favor. It has a growing population and several educational institutions available to strengthen the workforce. The manufacturing sector is a major employment force and has a very high job multiplier. Workers are becoming smarter and are gaining skills. The future looks more sunny than cloudy for the Upstate LWIA.

The patterns and trends described in this report offer cause for both optimism and concern. Upstate LWIA has an exciting future ahead of it and can lead the way in delivering the skilled talent and economic opportunities that businesses and workers in the area deserve.

INTRODUCTION

The Upstate Local Workforce Investment Area is composed of Cherokee, Spartanburg, and Union counties. The LWIA was home to several Revolutionary War battles and is located in the Piedmont region in the upper part of the state, bordering North Carolina. The historical economy was dominated by Agriculture (cotton), Textile Manufacturing, Cattle Farming, and Iron Mining. The modern economy revolves around the Manufacturing Industry.

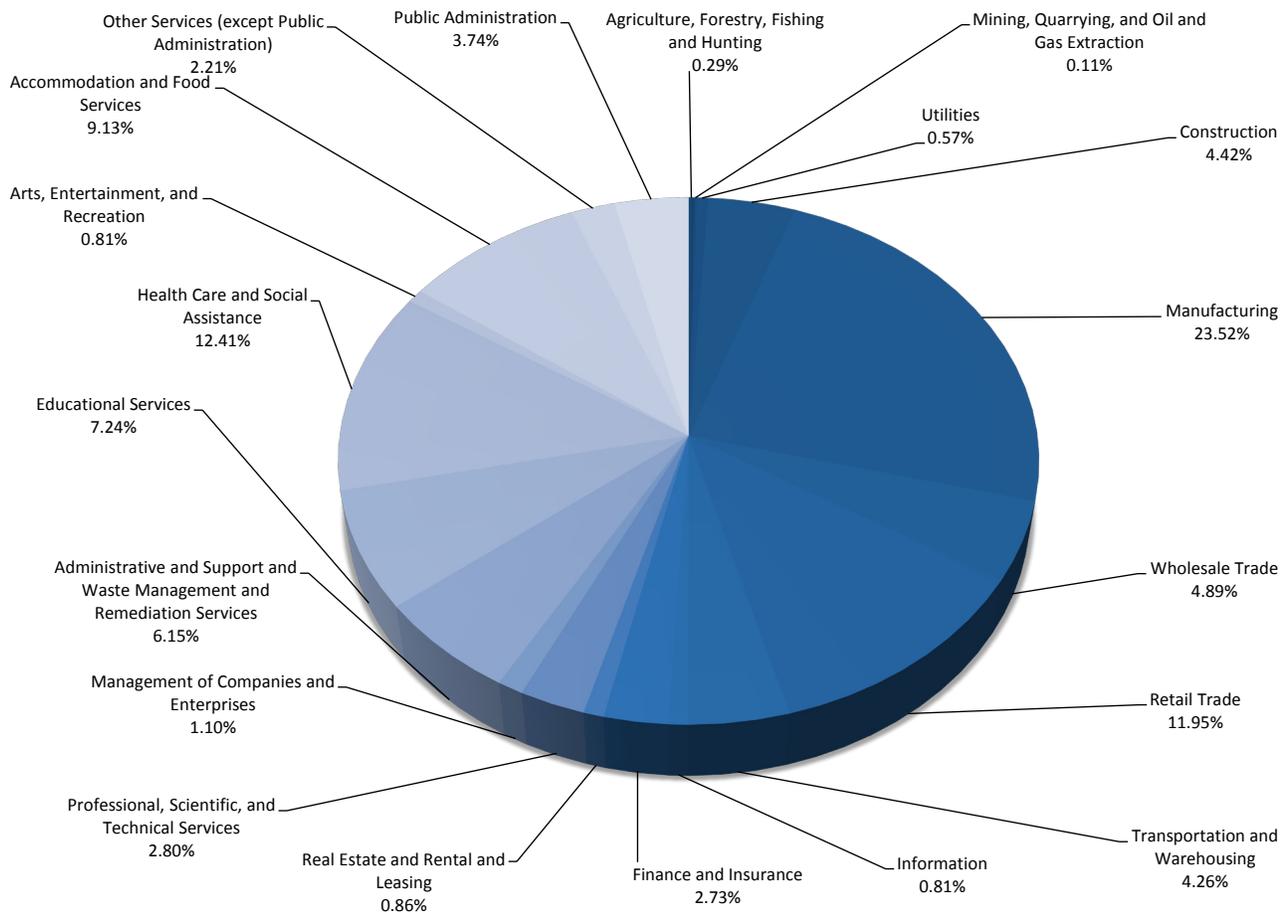
The economic changes this year in the Upstate LWIA demonstrate the shifting needs of employers and employees. Cultivating an understanding of the workforce allows all four counties to respond to anticipated future needs. Analyses help to identify the gap between what the workforce has in the way of talent and skills (supply), and what it may need in the future (demand).

The purpose of the Upstate LWIA Workforce Report is to present a comprehensive view of the status of Upstate LWIA's economy and workforce. The report includes an analysis of Upstate LWIA's workforce, industries, economic climate, and factors that will affect all. Forecasts will be made for the workforce, industries, and the economy.

ECONOMIC DISCUSSION: A CURRENT PICTURE OF THE WORKFORCE

EMPLOYMENT BY INDUSTRY

Figure 1: Upstate LWIA Employment By Industry - 3rd Quarter 2012



Source: Bureau of Labor Statistics (BLS), SC Department of Employment & Workforce (SCDEW), Quarterly Census of Employment and Wages (QCEW)

Manufacturing and Health Care and Social Assistance are the top two industries employing workers in the Upstate LWIA. Industries like Educational Services and Retail Trade are healthy and flourishing, while others like Construction are still recovering from the recession. The 2010 per capita income for Upstate LWIA was \$29,929, which is an increase of 24.7 percent from 2000.¹ Economic growth has taken place in the past decade to enhance the LWIA workforce, although the area is still recovering from a tough business cycle.

LOCATION QUOTIENT

A location quotient (LQ) is a useful tool for determining the concentration of workers in a given area. Location quotients compare the regional share of employment in a particular industry to the national share of employment in the same industry. The resulting quotient reveals the degree of regional specialization or concentration in an industry and provides insight into what makes the area unique in comparison to the national average. An LQ of 1.0 means the concentration of jobs in that industry matches the nation's value. Location quotients higher than 1.0 indicate the level of specialization the area has in particular sectors. Lower quotients can indicate possible industries that could be expanded.

Figure 2: Notable Upstate LWIA Location Quotients - 2011

Industry and Sectors	Location Quotient
<i>Cherokee County</i>	
Textile Mills	85.0
Apparel Manufacturing	6.8
Fabricated Metal Product Manufacturing	4.9
<i>Spartanburg County</i>	
Textile Mills	18.5
Plastics and Rubber Products Manufacturing	6.1
Transportation Equipment Manufacturing	5.9
<i>Union County</i>	
Textile Mills	107.6
Forestry and Logging	37.5
Manufacturing	3.0

Source: US Department of Labor, Bureau of Labor Statistics - http://data.bls.gov/location_quotient

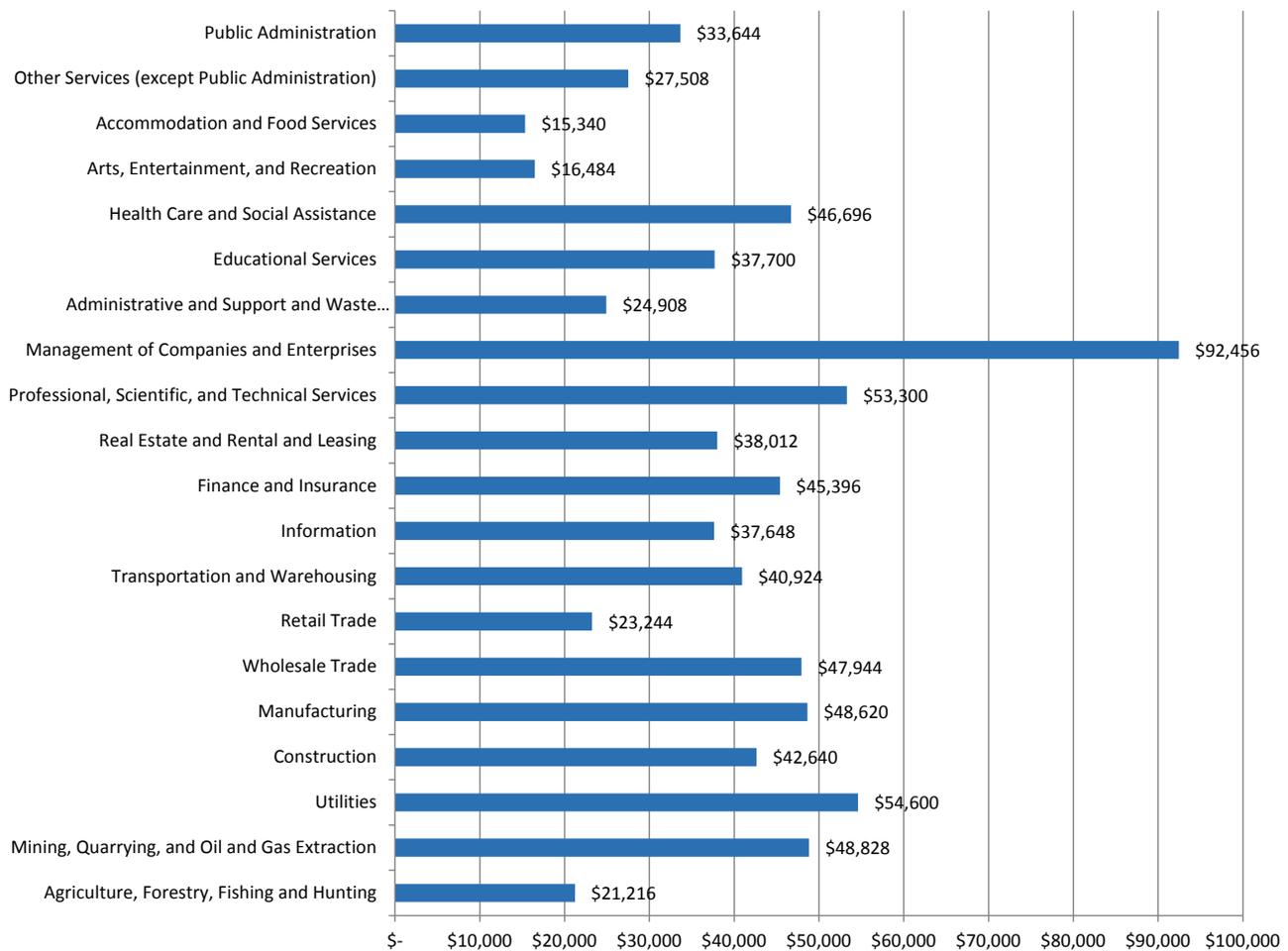
The Textile Mills industry tops the most concentrated sector in this area with location quotients over 80 in Cherokee and Union counties and over 18 in Spartanburg County. Other industries located throughout the area include Forestry and Logging and several types of manufacturing including Apparel, Fabricated Metal Product, Plastics and Rubber Products, and Transportation Equipment.

AVERAGE ANNUAL WAGE BY INDUSTRY

The annual wages for the Management of Companies sector employees are the highest for any LWIA industry. These workers administer and oversee the planning and decision making of companies and manage the securities of establishments. Utility workers are the second highest paid group of employees in the LWIA.

High wage industries like Professional, Scientific, and Technical Services, and Finance and Insurance usually require at least a bachelor’s degree. Having an education is an excellent way to enter a high-wage industry and have more options for employment.

Figure 3: Annual Average Wage by Industry - 3rd Quarter 2012



Source: BLS, SCDEW, QCEW

OCCUPATIONAL EMPLOYMENT

When examining the current occupational employment in the area, one can observe that some of the top 20 occupations are low-skill, low-pay jobs. These jobs, like Cashiers, Waiters and Waitresses, and Food Preparers, have high turnover. These are not necessarily the most robust jobs as far as wages, but they are jobs.

Figure 4 lists occupations, such as Registered Nurses, General Managers, and Sales Representatives, that pay a higher wage. With Manufacturing, Healthcare, and Retail Trade sectors comprising nearly half of the employment in the Upstate LWIA, the positions of Team Assemblers; Retail Salespersons; and Registered Nurses, not surprisingly, are listed among the top occupations.

Figure 4: Top 20 Occupations with Wages - 2012

Occupational Title	Total Employment	Hourly Average Wage (\$)
All Occupations	115,360	18.79
Team Assemblers	5,840	23.68
Cashiers	3,900	8.84
Stock Clerks and Order Fillers	3,090	9.65
Retail Salespersons	3,050	11.40
Laborers and Freight, Stock, and Material Movers, Hand	3,050	12.79
Combined Food Preparation and Serving Workers, Including Fast Food	2,730	8.34
Registered Nurses	2,720	25.86
Waiters and Waitresses	2,070	8.49
Customer Service Representatives	2,060	14.32
Heavy and Tractor-Trailer Truck Drivers	1,960	18.37
Office Clerks, General	1,880	12.58
Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	1,640	14.42
Sales Representatives, Wholesale and Manufacturing, Except Technical and Scientific Pr	1,630	29.60
Bookkeeping, Accounting, and Auditing Clerks	1,600	16.27
General and Operations Managers	1,540	52.45
Janitors and Cleaners, Except Maids and Housekeeping Cleaners	1,520	10.22
Industrial Truck and Tractor Operators	1,440	13.84
Maintenance and Repair Workers, General	1,350	17.44
Nursing Assistants	1,330	9.99
Inspectors, Testers, Sorters, Samplers, and Weighers	1,330	15.18

Source: BLS, SCDEW, Occupational Employment Statistics (OES)

SKILLS DATA

Employers are beginning to see that a person's skills, in addition to their education, may help in determining who to hire. Many times the degree is not as important as the skills gained through specialized training and/or experience. In order to be able to determine the current level of skills in the area, the top 50 current occupations by employment are presented, and assigned a low, middle, or high skill designation to that occupation. The definitions for those skills levels are:

- **LOW:** No high school or GED, or high school/GED with less than one year experience and no on-the-job-training (OJT), or short-term OJT
- **MIDDLE:** High school/GED with one year experience, or moderate OJT, or long-term OJT, or apprenticeship, or postsecondary vocational training, or some college, or associate's degree, or less than a bachelor's degree
- **HIGH:** Bachelor's degree or higher

In the Upstate area, 25 of the top 50 jobs in 2012 are considered low-skill jobs. Twenty-one are middle skill, and four are high-skill occupations.

Figure 5: Top Occupations By Skill Classification - Upstate 2012

Skillset: LOW
Cashiers
Childcare Workers
Combined Food Preparation and Serving Workers, Including Fast Food
Construction Laborers
Cooks, Institution and Cafeteria
Cooks, Restaurant
Customer Service Representatives
Food Preparation Workers
Helpers--Production Workers
Home Health Aides
Industrial Truck and Tractor Operators
Janitors and Cleaners, Except Maids and Housekeeping Cleaners
Laborers and Freight, Stock, and Material Movers, Hand
Landscaping and Groundskeeping Workers
Light Truck or Delivery Services Drivers
Maids and Housekeeping Cleaners
Office Clerks, General
Receptionists and Information Clerks
Retail Salespersons
Secretaries and Administrative Assistants, Except Legal, Medical, and Executive
Shipping, Receiving, and Traffic Clerks
Stock Clerks and Order Fillers
Teacher Assistants
Tellers
Waiters and Waitresses
Skillset: MIDDLE
Automotive Service Technicians and Mechanics
Bookkeeping, Accounting, and Auditing Clerks
First-Line Supervisors of Food Preparation and Serving Workers
First-Line Supervisors of Office and Administrative Support Workers
First-Line Supervisors of Production and Operating Workers
First-Line Supervisors of Retail Sales Workers
General and Operations Managers
Heavy and Tractor-Trailer Truck Drivers
Industrial Machinery Mechanics
Inspectors, Testers, Sorters, Samplers, and Weighers
Licensed Practical and Licensed Vocational Nurses
Machinists
Maintenance and Repair Workers, General
Medical Assistants
Nursing Assistants
Production, Planning, and Expediting Clerks
Registered Nurses
Sales Representatives, Wholesale and Manufacturing, Except Technical and Scientific Products
Substitute Teachers
Team Assemblers
Textile Knitting and Weaving Machine Setters, Operators, and Tenders
Skillset: HIGH
Accountants and Auditors
Elementary School Teachers, Except Special Education
Middle School Teachers, Except Special and Career/Technical Education
Secondary School Teachers, Except Special and Career/Technical Education

Source: BLS, SCDEW, OES, Workforce Intelligence (WI)

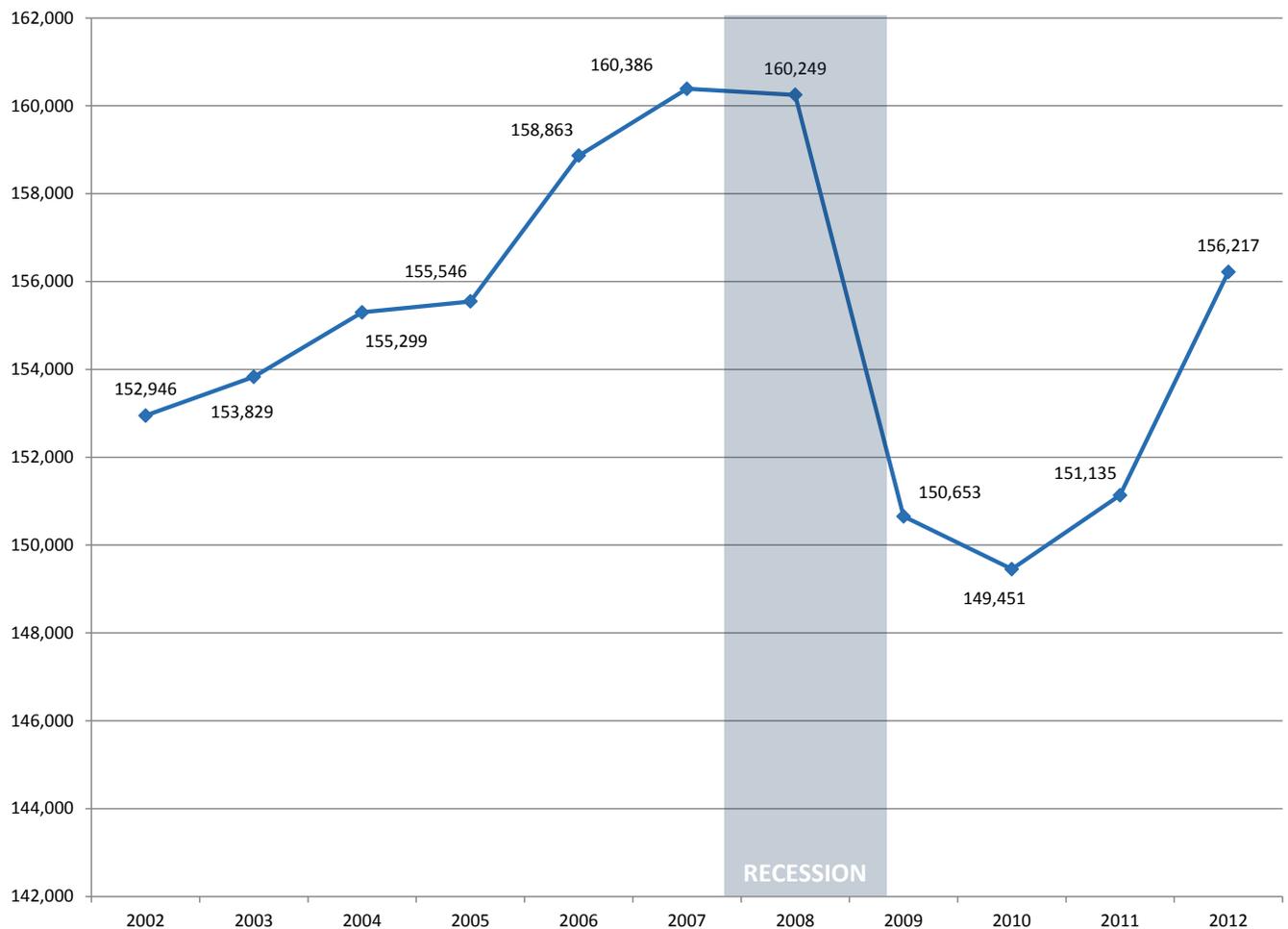
EMPLOYMENT AND UNEMPLOYMENT

A crucial indicator of the health of a workforce is its labor force levels. Labor force data count residents who are employed and unemployed. There are a few Federal definitions that will make discussion of the labor force a little easier to understand.

- Employed: Persons 16 years old or older who worked for pay any time during the week that includes the 12th of the month
- Unemployed: Persons 16 years old or older who are not working but want a job, and are able and willing to work
- Labor Force: Employed plus unemployed
- Unemployment Rate: Unemployment divided by labor force

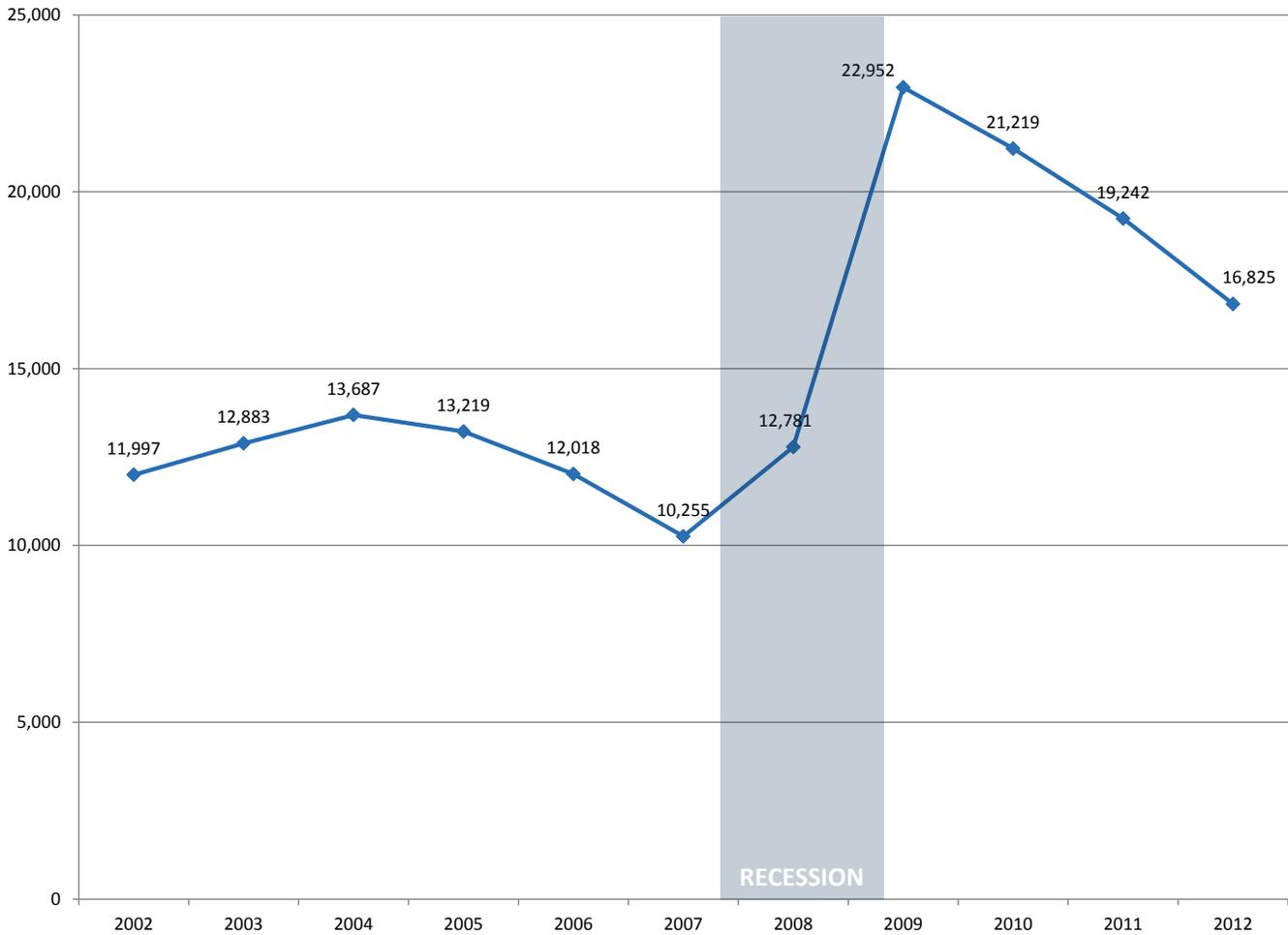
In Figure 6, the recession (officially from December 2007 through June 2009) had a great effect on the labor force. Employment dropped, and unemployment increased by 124 percent.

Figure 6: Employment - 2002-2012



Source: BLS, SCDEW, Local Area Unemployment Statistics (LAUS)

Figure 7: Unemployment - 2002-2012

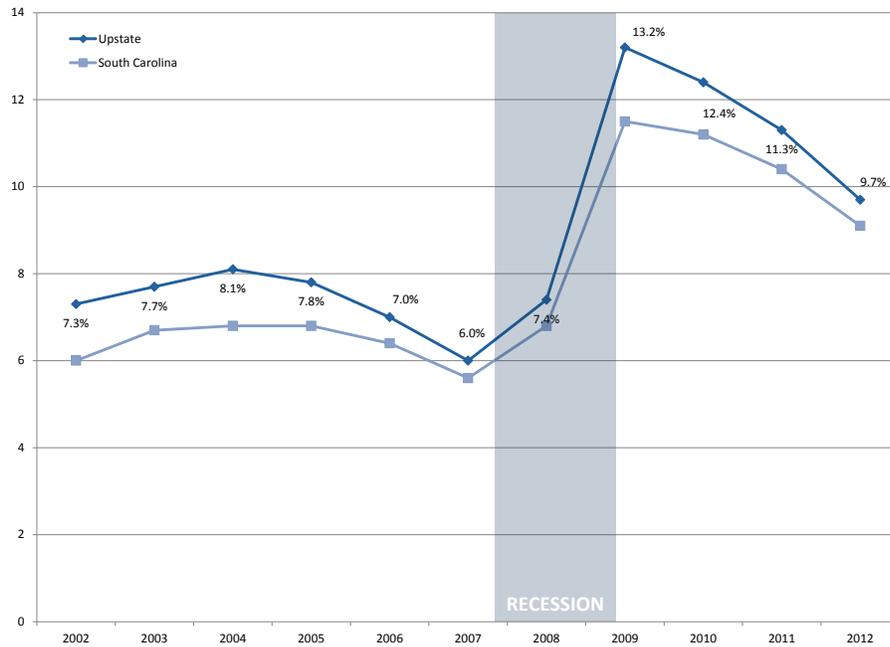


Source: BLS, SCDEW, LAUS

Tracking annual unemployment rates give a good snapshot of the state of an area's workforce. Annual rates smooth out the usual ups and downs of a month-to-month rate (due to normal seasonal or cyclical changes) to give a more accurate picture.

Figure 8 shows the annual rates for the Upstate LWIA area and South Carolina. Upstate has historically been above the state's rate, and this was the same during and after the recession. During the recession, the Upstate rate more than doubled from 6.0 percent in 2007 to 13.2 percent in 2009.

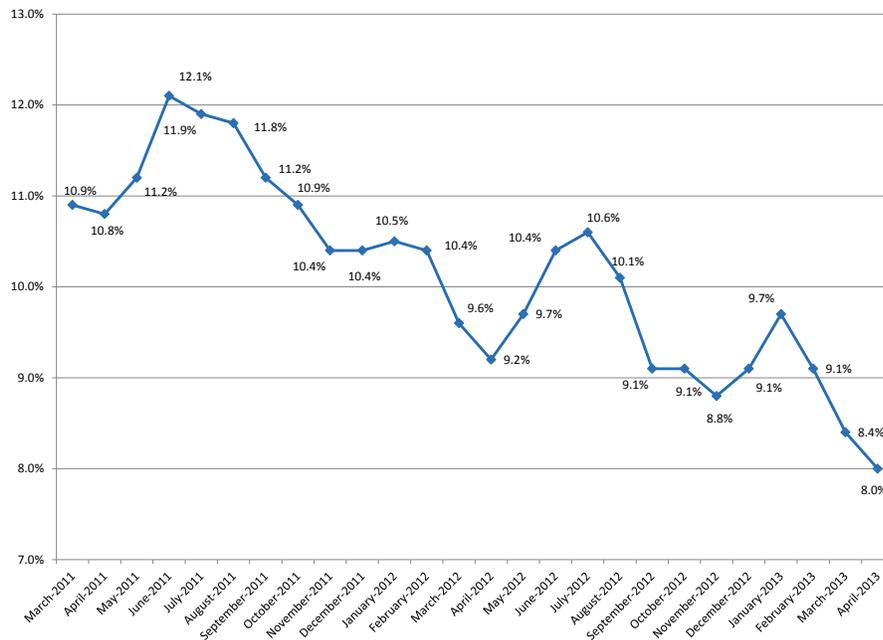
Figure 8: Annual Unemployment - 2002-2012



Source: BLS, SCDEW, LAUS

Figure 9 illustrates that the monthly unemployment rate has seen wide fluctuations since March 2011. The area seems to be steadily recovering from the recession.

Figure 9: Monthly Unemployment Rate - March 2011-April 2013



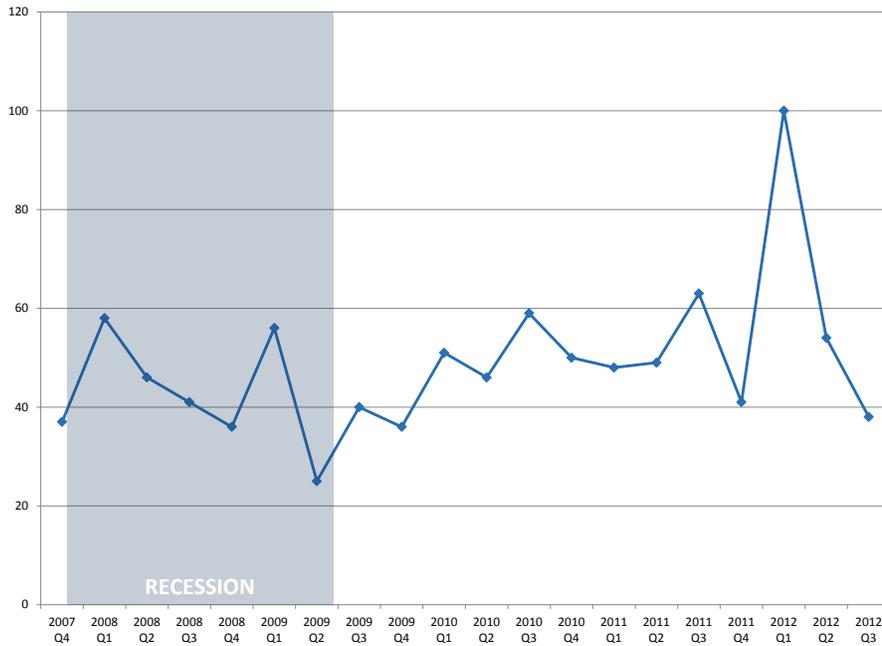
Source: BLS, SCDEW, LAUS

NEW STARTUP FIRMS

One way to see if an economy is improving is to examine data about startup firms. An increase in new companies might be an indicator of expansion in the area, whereas a drop in new firms shows a lack of confidence in the future. (Note: There is almost always a spike in startups in the first quar-

ter of the year.) Again, the recession had a major impact on normal business birth and death rates. Startups have been steady in the area with a large increase in early 2012.

Figure 10: New Startup Firms - 2007-2012



Source: BLS, SCDEW, QCEW

EMPLOYERS BY SIZE OF ESTABLISHMENT

By far, the largest category of business size in the area is small business. Small businesses (or establishments) are defined in South Carolina as companies employing 49 or fewer people. The Upstate LWIA and the state as a whole have 93 percent of establishments designated as small businesses.

Small businesses may need more support and assistance than larger companies because they may not have a designated human resources department or person. They may rely on other resources, such as SC Works Centers, for help with hiring, training, or screening job candidates.

Figure 11: Employers by Size of Establishment - 3rd Quarter 2012

Employees	Upstate	South Carolina
0 to 4	3,647	63,766
5 to 9	1,366	19,667
10 to 19	961	13,316
20 to 49	703	9,881
50 to 99	283	3,907
100 to 249	151	2,433
250 to 499	49	757
500 to 999	16	328
1000 +	7	264

Source: BLS, SCDEW, QCEW

SUPPLY: WHAT'S OUT THERE?

A manufacturing assembly line needs to have resources and supplies on-hand so that the line does not have to stop. The same is true for the workforce. The supply of workers needs to be of the right quantity and quality to do the job. Is the supply of workers in line with what the companies in the Upstate LWIA need? Seven streams of workforce supply provide an indication: population, commuting, education of the population, clusters of high school students, awards earned at higher education institutions, and characteristics of unemployment insurance claims and claimants.

POPULATION BY AGE

Age distribution in the area is similar to the state and the country for most segments of the population. In the 20-34 age cohorts, Upstate has a slightly lower proportion of population than the state as a whole does, and in the 35-59 age cohorts, the LWIA has a slightly higher proportion of population than the state.

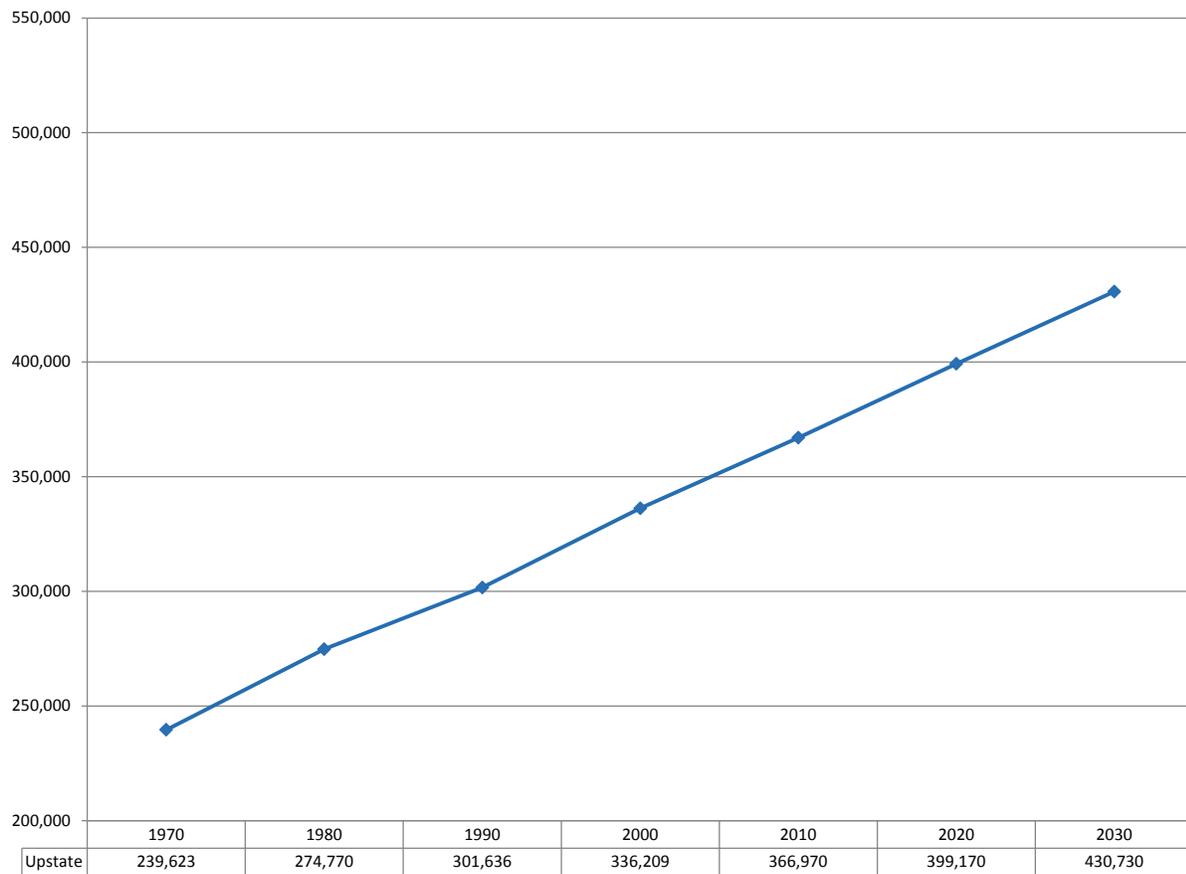
Figure 12: Population by Age

Age Range	Upstate	SC	US
0-4	6.7%	6.5%	6.6%
5-9	6.8%	6.4%	6.6%
10-14	6.6%	6.5%	6.7%
15-19	7.3%	7.2%	7.2%
20-24	6.4%	7.2%	7.0%
25-29	6.0%	6.6%	6.8%
30-34	5.9%	6.2%	6.4%
35-39	6.9%	6.5%	6.6%
40-44	7.0%	6.8%	7.0%
45-49	7.4%	7.2%	7.4%
50-54	7.1%	7.0%	7.2%
55-59	6.7%	6.5%	6.3%
60-64	5.7%	5.9%	5.3%
65-69	4.3%	4.5%	3.9%
70-74	3.4%	3.3%	3.0%
75-79	2.6%	2.5%	2.4%
80-84	1.9%	1.7%	1.9%
85 and older	1.4%	1.5%	1.7%

Source: US Bureau of Census, American Community Survey (ACS)

POPULATION CHANGE AND MIGRATION

Figure 13: Population Projections to 2030



Source: US Census Bureau, Census 2000, SC Department of Health and Environmental Control - Vital Records Department. Population projections calculated by SC Budget and Control Board, Office of Research and Statistics

After a steady increase in population from 1990 to 2000 (up 11.5 percent), the growth of the population of this area slowed slightly, growing by 9 percent over the next 10 years. Growth is projected to increase less than 1 percent per year to 2030.

Figure 14: Population Migration - 2011 - 5-Year Estimate

	Total	Moved From Different State	Moved From Abroad	Moved From Different County	Moved Within Same County
Population 1 year and over	360,361	2.0%	0.3%	2.4%	9.0%
Hispanic or Latino origin (of any race)	17,622	4.0%	2.0%	1.7%	10.9%
White alone, not Hispanic or Latino	255,117	2.0%	0.2%	2.2%	7.4%
Population 25 Years and Over					
Less than high school graduate	50,328	1.0%	0.3%	2.4%	10.2%
High school graduate/GED	78,976	1.6%	0.2%	1.8%	7.4%
Some college or associate's degree	68,040	1.9%	0.2%	1.6%	7.0%
Bachelor's degree	29,318	2.9%	0.3%	2.0%	4.6%
Graduate or professional degree	15,313	3.1%	0.6%	1.6%	2.6%

Source: US Census Bureau, ACS, SCDEW

In-migration (people moving into Upstate) shows that less than 4 percent of residents with a graduate degree and also those with a bachelor’s degree came from out of state or out of the country. While Hispanics moved into Upstate LWIA from a different state at twice the rate of Whites, they moved into Upstate from abroad at 10 times the rate of Whites. Though almost 14 percent of residents over the age of one moved, only 2.3 percent came from outside of South Carolina.

COMMUTING PATTERNS

The vast majority of the workers (70 percent) of Upstate lives and works in the LWIA. The tables in Figure 15 show that 28,500 workers commute in from other areas to work in the LWIA. Greenville County draws a notable portion of Upstate LWIA’s residents out of the area to work. Over 3,400 more employees commute into the area than leave it to work.

Figure 15: Commuting Patterns - 2010

To Upstate WIA From	28,522	From Upstate WIA To	25,085
Greenville County, SC	15,161	Greenville County, SC	16,577
Cleveland County, NC	1,787	Cleveland County, NC	854
Polk County, NC	1,732	Laurens County, SC	739
Laurens County, SC	1,719	Mecklenburg County, NC	671
		York County, SC	490

Source: US Census Bureau, ACS

EDUCATIONAL ATTAINMENT

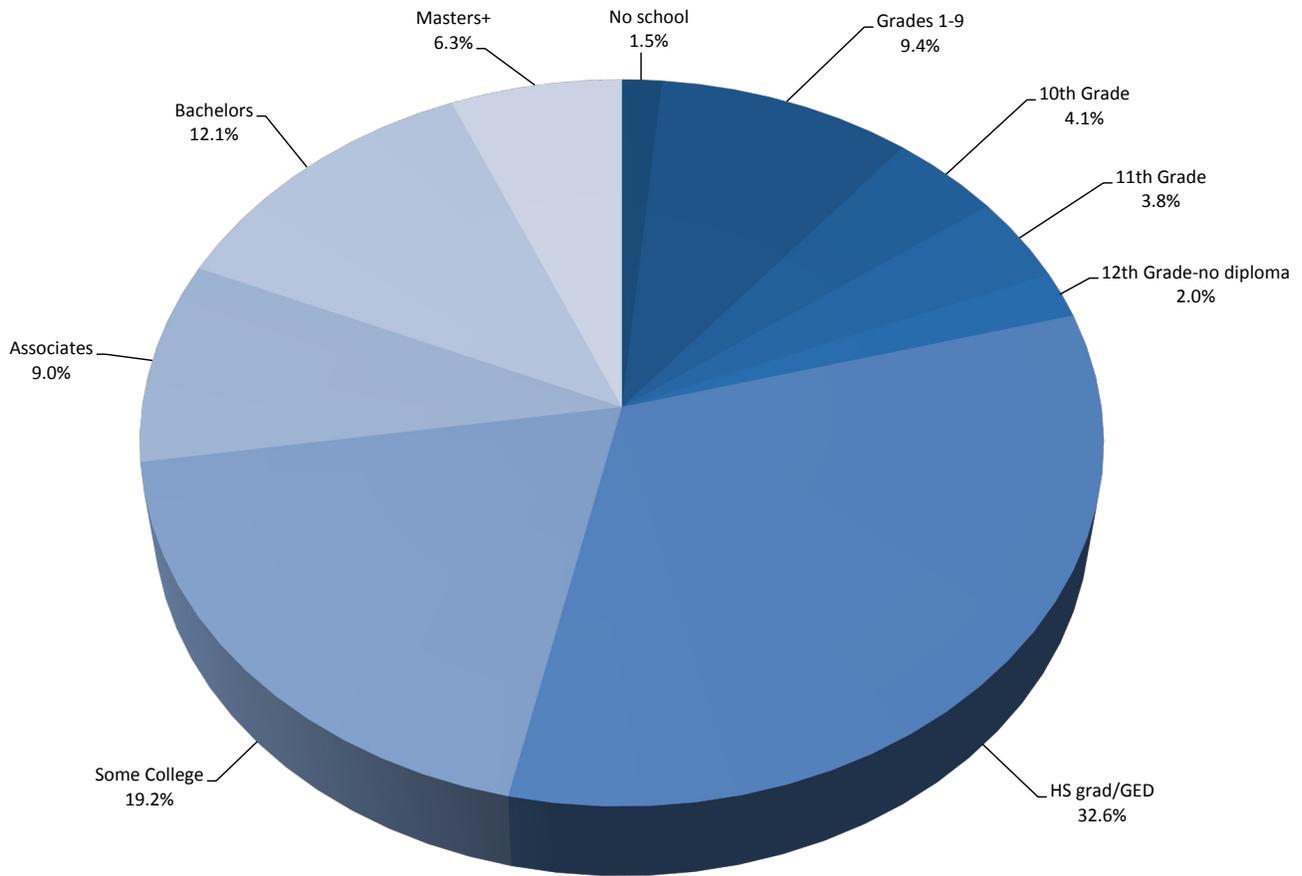
The Upstate LWIA has a higher concentration of residents with less than a high school diploma or GED than the state as a whole but a higher concentration with a high school education or with an associate’s degree than the state as a whole. It also has a notably lower percent of residents with a bachelor’s degree or higher than the state does.

Figure 16: Educational Attainment - Upstate and South Carolina 2011

Education Level	Upstate	SC
No school	1.5	1.1
Grades 1-9	9.4	7.0
10th Grade	4.1	3.3
11th Grade	3.8	3.2
12th Grade-no diploma	2.0	1.8
HS grad/GED	32.6	30.9
Some College	19.2	20.1
Associates	9.0	8.4
Bachelors	12.1	15.6
Masters+	6.3	8.6

Source: US Census Bureau, ACS, SCDEW

Figure 17: Educational Attainment - Upstate 2011

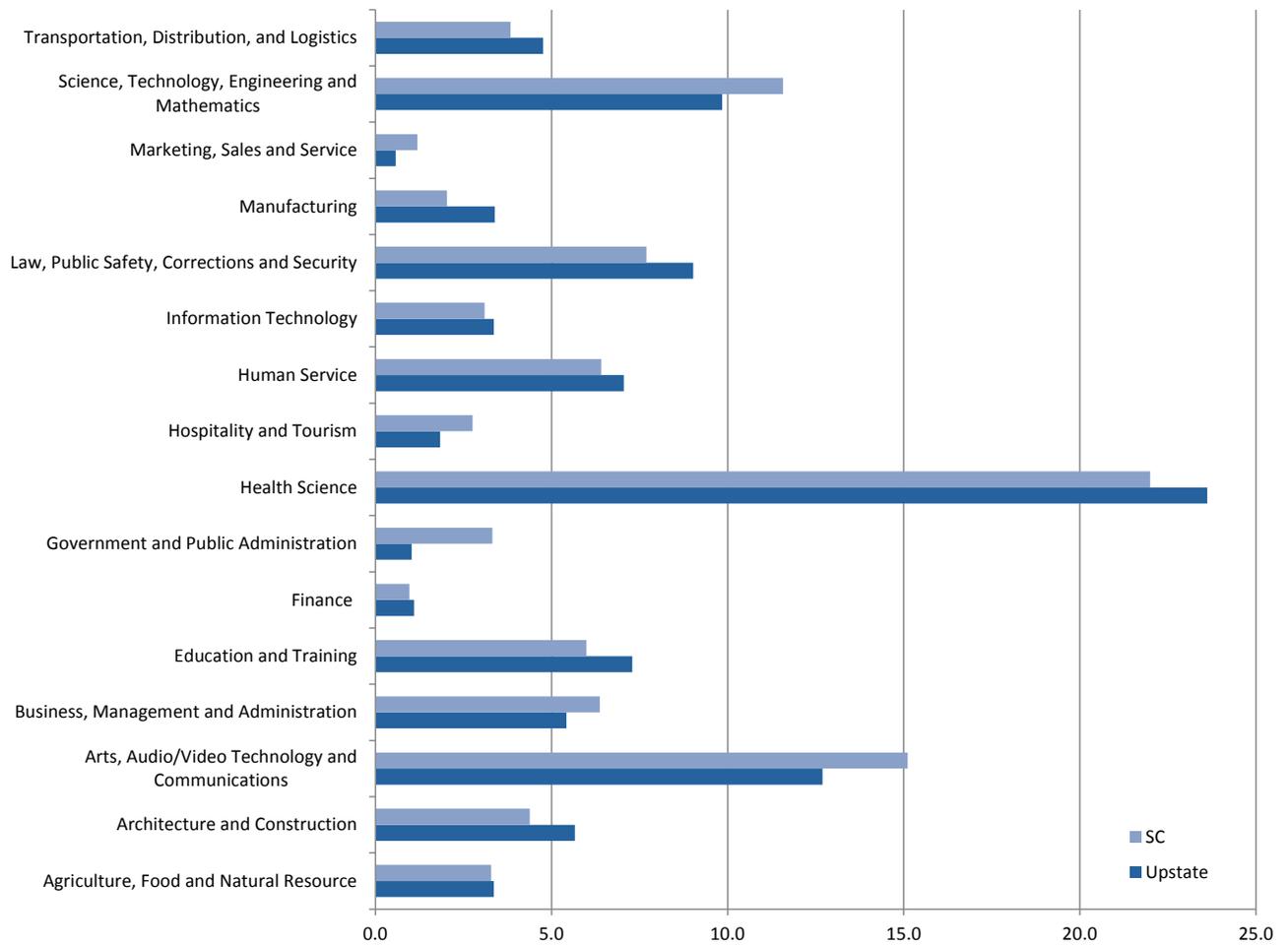


Source: US Census Bureau, ACS, SCDEW

CAREER CLUSTERS SELECTED BY HIGH SCHOOL STUDENTS

Eighth-grade students in South Carolina are required to choose a career cluster to concentrate on to lead them to a post-high school job or college major. There are 16 career clusters.

Figure 18: Percent of Students Declaring a Career Clusters In Upstate and SC - 2012



Note: Declared clusters for students declaring a specific cluster on their primary Electronic Individual Graduation Plan (e-IGP) for 2011-2012 year

Source: SC Department of Education

The Health Science career cluster is the top choice for students in the Upstate area likely in response to news of a shortage of healthcare workers in South Carolina. In keeping with the state trend, the area’s students also picked the Arts, Audio/Video Technology and Communications cluster in notable numbers. Science, Technology, Engineering and Mathematics and Law, Public Safety, Corrections and Security clusters were choices for many students.

Figure 19: Career Clusters - 2012

Cluster	Upstate	SC
Agriculture, Food and Natural Resource	3.4	3.3
Architecture and Construction	5.7	4.4
Arts, Audio/Video Technology and Communications	12.7	15.1
Business, Management and Administration	5.4	6.4
Education and Training	7.3	6.0
Finance	1.1	1.0
Government and Public Administration	1.0	3.3
Health Science	23.6	22.0
Hospitality and Tourism	1.8	2.8
Human Service	7.0	6.4
Information Technology	3.4	3.1
Law, Public Safety, Corrections and Security	9.0	7.7
Manufacturing	3.4	2.0
Marketing, Sales and Service	0.6	1.2
Science, Technology, Engineering and Mathematics	9.8	11.6
Transportation, Distribution, and Logistics	4.8	3.8

Source: SC Department of Education

DEGREES AWARDED

In higher education, Upstate area colleges and universities have conferred a wide variety of awards. Of the top 20, Liberal Arts and Sciences and Business Administration and Management are the most popular followed by Registered Nurse Training. The institutions included in this data are Converse College, Limestone College, Spartanburg Community College, Spartanburg Methodist College, USC-Union, USC-Upstate, and Wofford College.

Figure 20: Top 20 Majors in Upstate - 2011

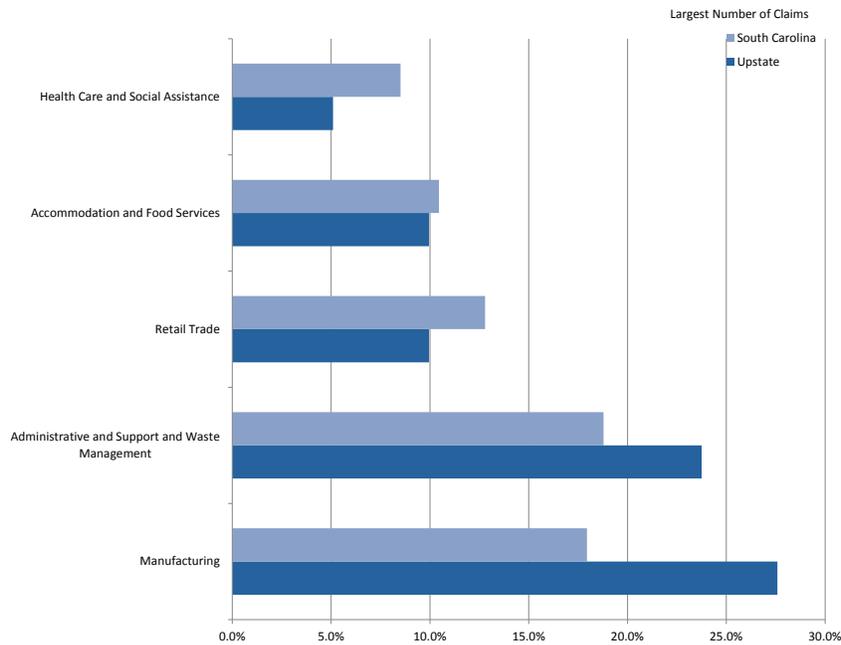
Majors	
Liberal Arts and Sciences/Liberal Studies	474
Business Administration, Management and Operations	264
Nursing - Registered Nurse Training, BSN Generic	213
Management	176
Psychology, General	138
Early Childhood Education and Teaching	119
Elementary Education and Teaching	114
Biology/Biological Sciences, General	106
Social Work	102
Criminal Justice/Law Enforcement Administration	101
Nursing - Registered Nurse Training, BSN Comp	69
Multi-/Interdisciplinary Studies, Other	60
Speech Communication and Rhetoric	56
Business Administration and Management, General	52
English Language and Literature, General	52
Business/Commerce, General	50
History, General	45
Business/Managerial Economics	44
Welding Technology/Welder	43
Political Science and Government, General	42

Source: SC Commission on Higher Education, http://www.che.sc.gov/New_Web/Data&Pubs.htm

CHARACTERISTICS OF UI CLAIMS BY OCCUPATION

Another source of supply for the workforce is people who are receiving unemployment compensation. In the Upstate LWIA area, the highest number of claims is filed in the Manufacturing industry followed by the Administrative and Support and Waste Management group. The latter group includes office administrative services; facilities support services; employment services; services to buildings and dwellings; and waste collection, treatment, and disposal services. These industries highlight the manufacturing base of the economy of the Upstate LWIA and its support.

Figure 21: Characteristics of UI Claims by Occupation - April 2013



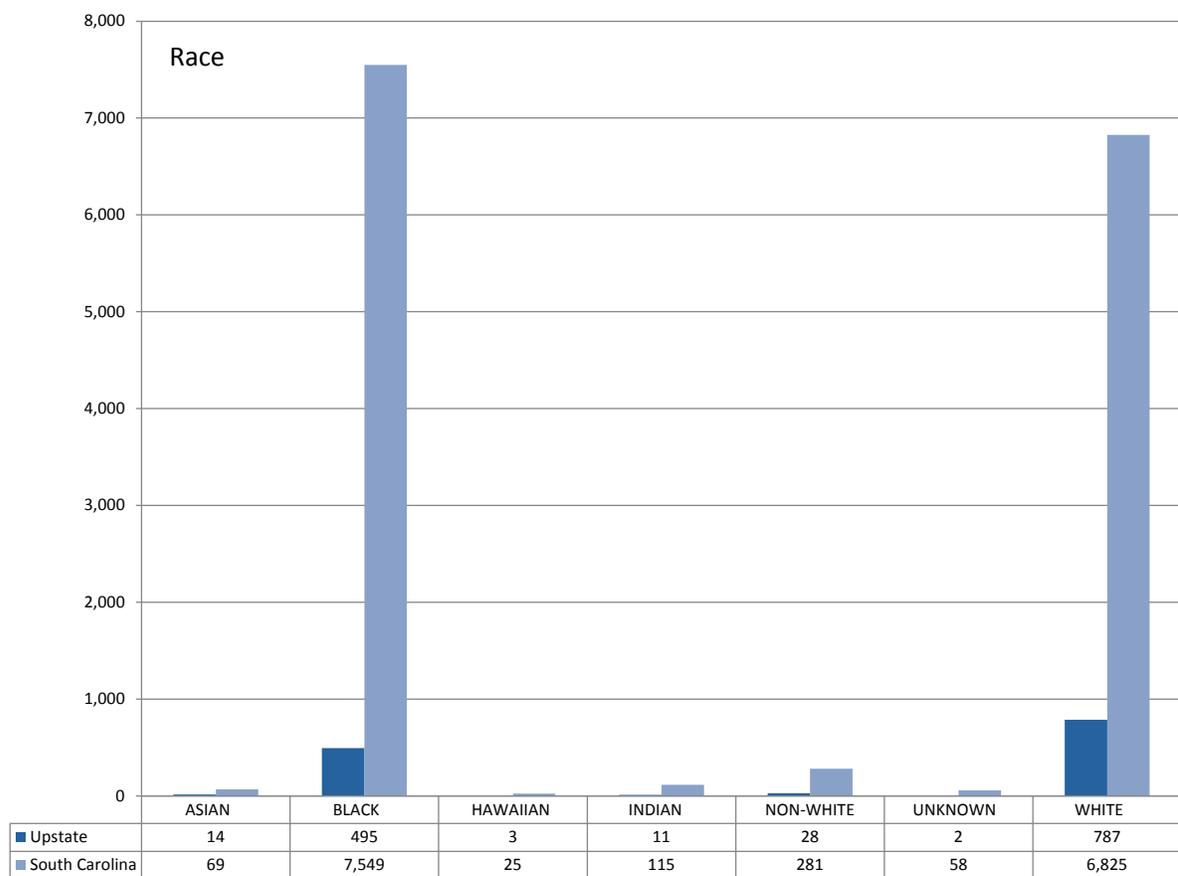
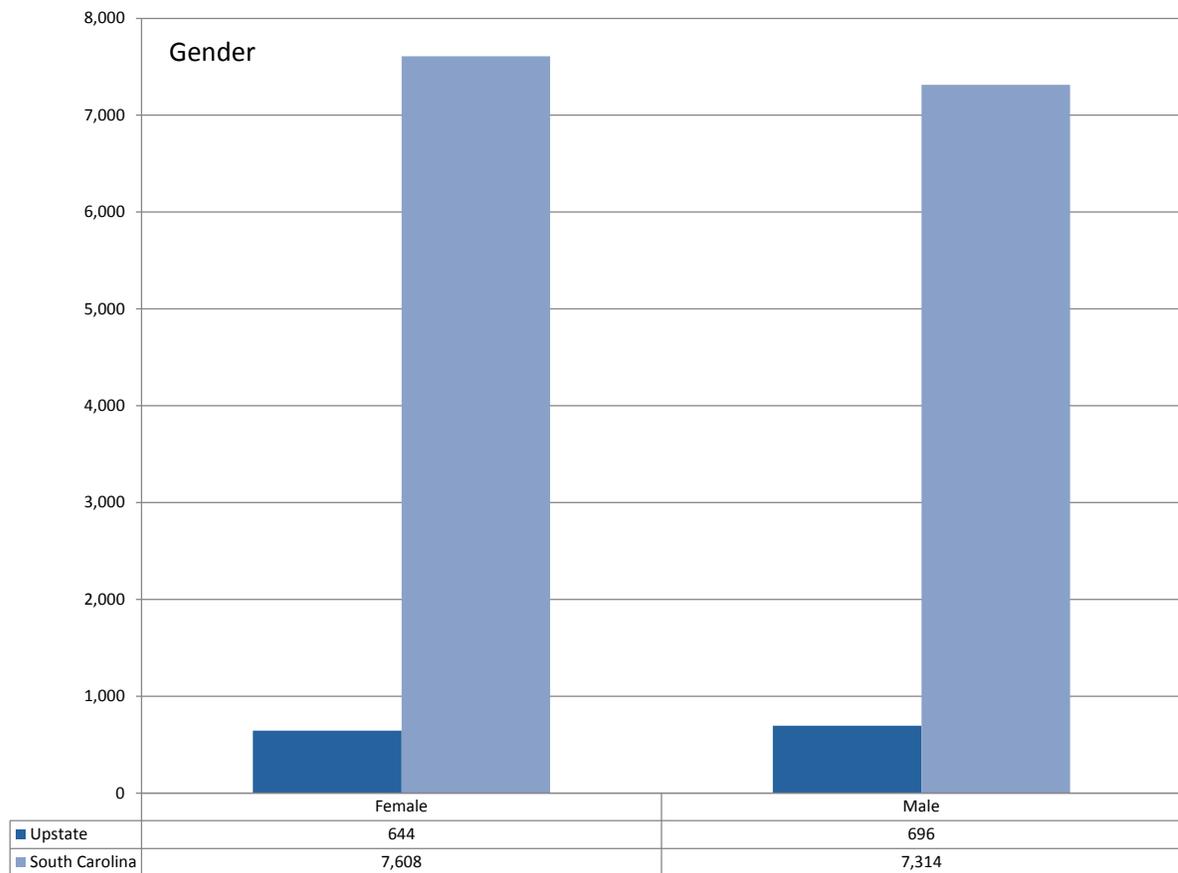
Occupation	Upstate	South Carolina
Manufacturing	352	2,267
Administrative and Support and Waste Management	303	2,373
Retail Trade	127	1,616
Accommodation and Food Services	127	1,321
Health Care and Social Assistance	65	1,076
Construction	62	820
Wholesale Trade	59	445
Professional, Scientific, and Technical Services	53	698
Transportation and Warehousing	34	414
Other Services (except Public Administration)	23	292
Finance and Insurance	21	300
Educational Services	15	222
Real Estate and Rental and Leasing	10	213
Public Administration	9	206
Information	7	122
Management of Companies and Enterprises	4	35
Arts, Entertainment, and Recreation	3	94
Agriculture, Forestry, Fishing and Hunting	1	98
Utilities	1	22

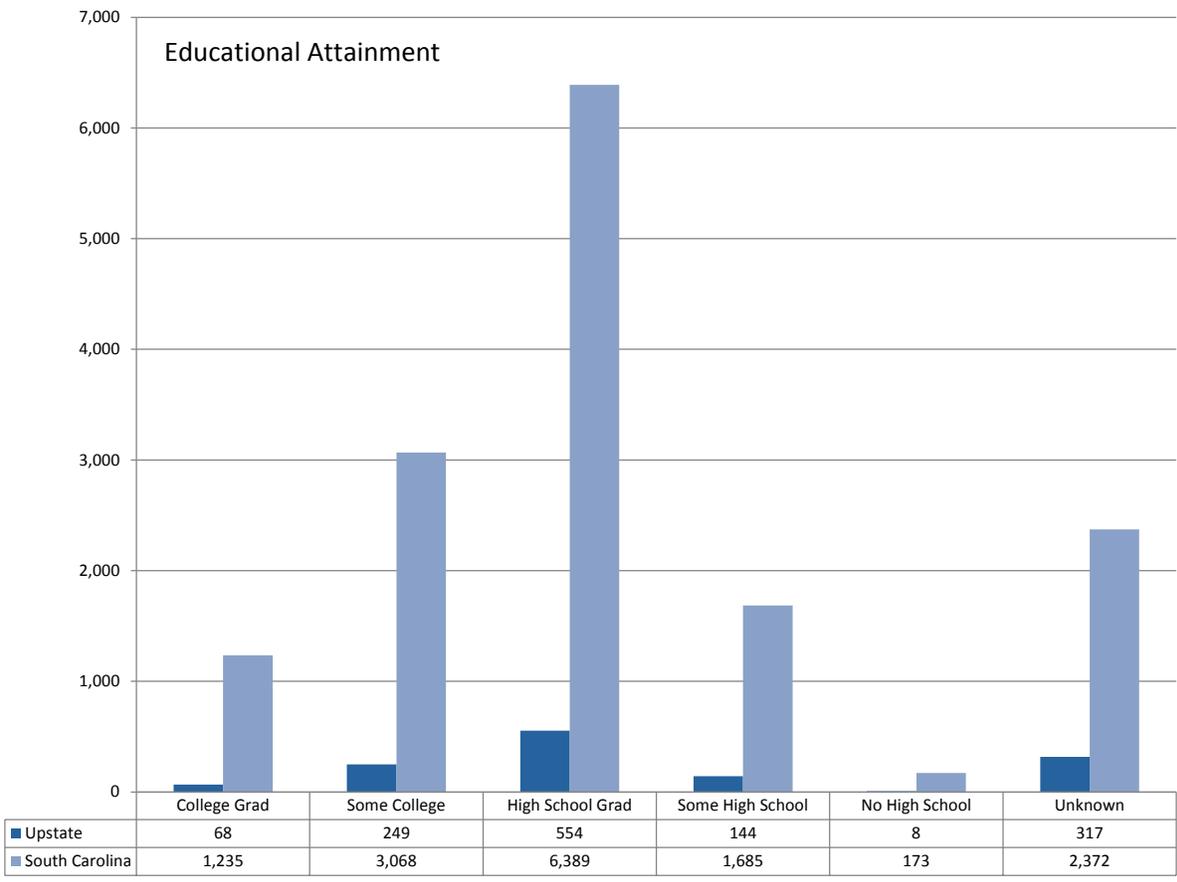
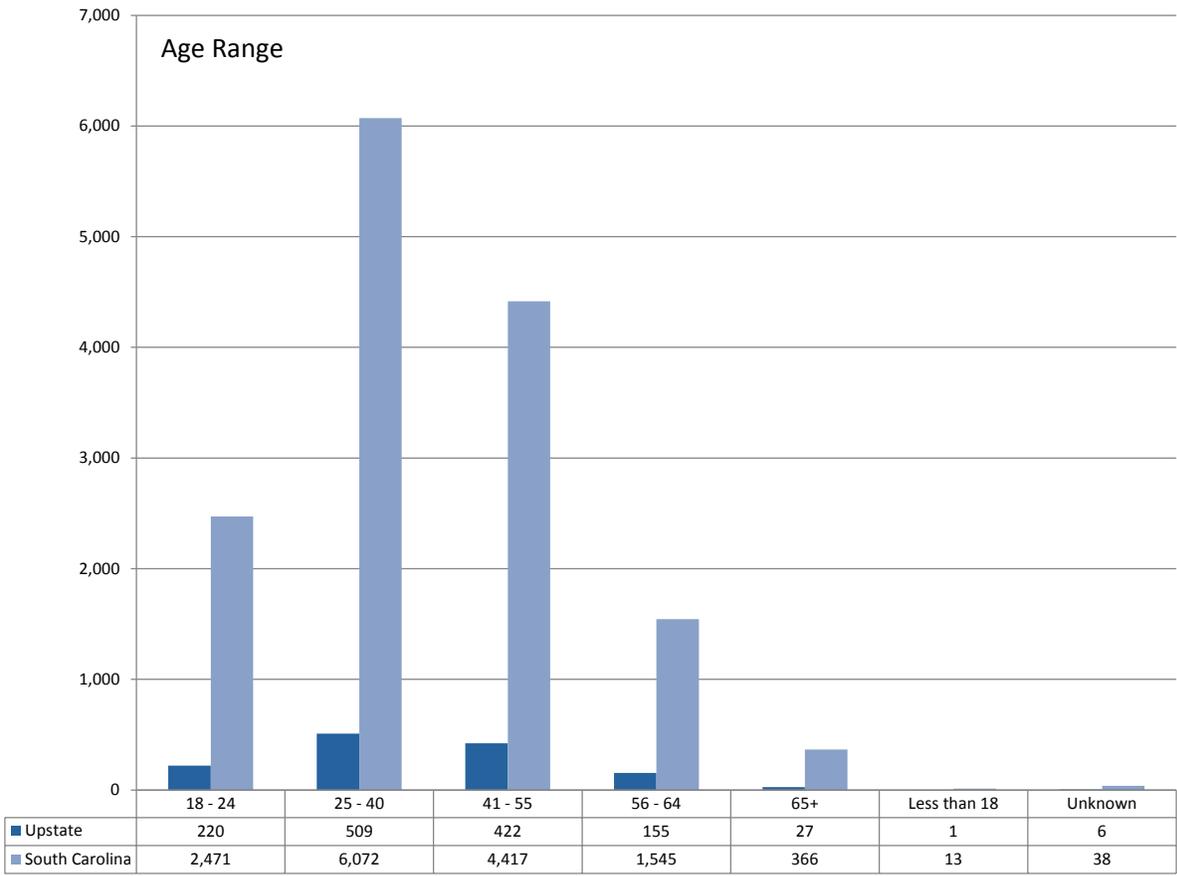
Source: SCDEW

UNEMPLOYMENT INSURANCE CLAIMANT CHARACTERISTICS

The people in this area who were receiving unemployment insurance benefits in April 2013 were typically male, white, 25-40 years old, and were high school graduates or earned a GED.

Figure 22: UI Claimant Characteristics - April 2013





Source: SCDEW

DEMAND: WHAT DO WE NEED?

Workforce demand shows what is needed in an area to support current and future employers. This section examines current (real-time) demand through online job advertisements, industry and occupational projections to 2018, educational requirements for future jobs, and the skills needed for those occupations.

Online job advertisements give a snapshot of what positions need to be filled in an area. The data is from the Conference Board Help Wanted OnLine® Data Series (HWOL) which measures the number of new and reposted job ads from over 16,000 Internet job boards. In April 2013, the largest occupational group with job ads in the Upstate LWIA was Healthcare Practitioners and Technical Occupations followed by Sales and Related Occupations.

ONLINE JOB ADVERTISEMENTS

Figure 23: Upstate HWOL - April 2013 by Major Group

Occupation	# of Job Ads
Healthcare Practitioners and Technical Occupations	632
Sales and Related Occupations	350
Transportation and Material Moving Occupations	283
Office and Administrative Support Occupations	255
Architecture and Engineering Occupations	200
Management Occupations	199
Production Occupations	168
Healthcare Support Occupations	161
Installation, Maintenance, and Repair Occupations	149
Computer and Mathematical Occupations	146
Business and Financial Operations Occupations	133
Food Preparation and Serving Related Occupations	114
Miscellaneous	108
Building and Grounds Cleaning and Maintenance Occupations	53
Construction and Extraction Occupations	46
Arts, Design, Entertainment, Sports, and Media Occupations	37
Education, Training, and Library Occupations	36
Personal Care and Service Occupations	33
Life, Physical, and Social Science Occupations	31
Protective Service Occupations	24
Community and Social Services Occupations	13
Farming, Fishing, and Forestry Occupations	10
Legal Occupations	7
Military Specific Occupations	1

Note: A job advertisement may include multiple openings.

Source: The Conference Board Help Wanted OnLine® Data Series (HWOL)

INDUSTRY PROJECTIONS

The Health Care and Social Assistance industry is projected to have the largest increase in employment from 2008 to 2018, growing by 2,855 jobs or 286 jobs/year. This sector includes services such as ambulatory health care services, hospitals, nursing and residential care facilities, and social as-

sistance services. The Accommodation and Food Services category reports the next largest growth with a projected 159 openings/year. This sector includes hotels, motels, recreational vehicle parks, restaurants, and drinking places.

Figure 24: Industry Projections - 2008-2018

Industry	Estimate Employment (2008)	Projected Employment (2018)	Change	Percent Change	Annual Percent Change
Total Employment, All Jobs	159,479	167,029	7,550	4.73	0.46
Health Care and Social Assistance	15,556	18,411	2,855	18.35	1.70
Accommodation and Food Services	12,921	14,506	1,585	12.27	1.16
Professional, Scientific, and Technical Services	4,202	5,639	1,437	34.20	2.99
Retail Trade	16,983	17,973	990	5.83	0.57
Transportation and Warehousing	6,023	6,897	874	14.51	1.36
Wholesale Trade	6,965	7,778	813	11.67	1.11
Educational Services	11,851	12,629	778	6.56	0.64
Construction	8,406	8,985	579	6.89	0.67
Finance and Insurance	4,565	5,076	511	11.19	1.07
Management of Companies and Enterprises	2,072	2,447	375	18.10	1.68
Government	7,530	7,736	206	2.74	0.27
Arts, Entertainment, and Recreation	1,462	1,661	199	13.61	1.28
Real Estate and Rental and Leasing	1,384	1,483	99	7.15	0.69
Administrative and Support and Waste Management and Remediation Services	7,136	7,191	55	0.77	0.08
Information	1,000	1,025	25	2.50	0.25
Utilities	387	396	9	2.33	0.23
Mining	207	179	-28	-13.53	-1.44
Other Services (Except Government)	6,145	6,042	-103	-1.68	-0.17
Agriculture, Forestry, Fishing and Hunting	1,193	809	-384	-32.19	-3.81
Manufacturing	34,466	30,936	-3,530	-10.24	-1.07

Source: BLS, SCDEW, QCEW, WI

OCCUPATIONAL PROJECTIONS

Many of the jobs that are projected to have numerous openings between 2008 and 2018 in this area support a growing economy. Healthcare occupations lead the projected highest percent change employment listing with eight of the top ten positions.

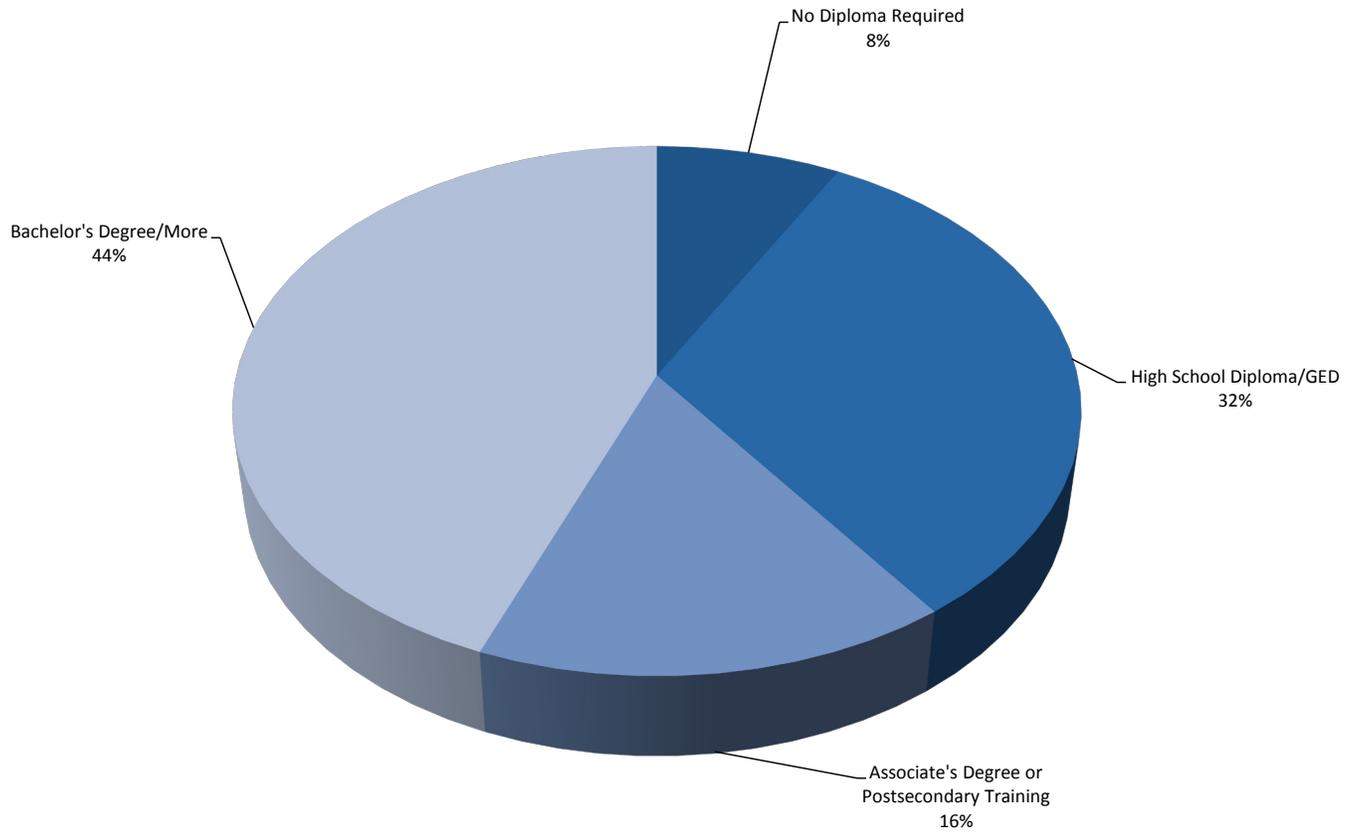
Figure 25: Growing Occupations - 2008-2018

Occupation	Estimated Employment (2008)	Projected Employment (2018)
Nursing Aides, Orderlies, and Attendants	1,782	2,213
Carpenters	933	1,199
Pharmacy Technicians	468	651
Insurance Sales Agents	438	548
Medical Assistants	360	473
Fitness Trainers and Aerobics Instructors	327	418
Physical Therapists	310	408
Dental Hygienists	259	356
Pharmacists	280	345
Dental Assistants	244	337
Paralegals and Legal Assistants	188	251
Nonfarm Animal Caretakers	192	239
Physical Therapist Assistants	86	121
Veterinary Technologists and Technicians	67	95
Chiropractors	52	64
Mental Health and Substance Abuse Social Workers	45	56
Veterinary Asst. and Laboratory Animal Caretakers	40	51
Veterinarians	30	40
Surveyors	16	21
Financial Examiners	3	4

Source: BLS, SCDEW, OES, WI

Of the top 50 projected occupations, 16 require a high school diploma or GED, four require less than a high school diploma or GED, 22 require a bachelor's degree or higher, and eight need an associate's degree or require some kind of postsecondary training. All of the four requiring less than a high school diploma or GED also require short-term on-the-job training (OJT), which is defined by the US Department of Labor as less than one month.

Figure 26: Education for Top 50 Projected Occupations



Source: BLS, SCDEW, OES, WI

It is just as important to know which occupations are declining in the area. Declines are often due to technological advances (i.e. computers or robots replacing humans), so many of the declining occupations are projected to be manual labor jobs, as shown in Figure 27.

Figure 27: Top 20 Projected Declining Occupations in Upstate - 2008-2018

Occupation
Chemical Plant and System Operators
Computer Operators
Drywall and Ceiling Tile Installers
Extruding and Forming Machine Setters, Operators
File Clerks
Furnace, Kiln, Oven, Drier, & Kettle Oper. & Tender
Information and Record Clerks, All Other
Lathe and Turning Machine Tool Setters, Operators
Machine Feeders and Offbearers
Meter Readers, Utilities
Order Clerks
Postal Service Clerks
Postal Service Mail Sorters, Processors
Roofers
Sewing Machine Operators
Stationary Engineers and Boiler Operators
Textile Bleaching & Dyeing Machine Op. & Tenders
Textile Cutting Machine Setters, Operators, Tender
Textile Knitting and Weaving Machine Setters
Textile Winding, Twisting, and Drawing Out Machine

Source: BLS, SCDEW, OES, WI

SKILLS OF PROJECTED OCCUPATIONS

Using the top 50 projected occupations, the skill levels needed for the future workforce based on the definitions given earlier in this report can be categorized.

Figure 28: Skill Levels

Low	7
Middle	21
High	22

Source: BLS, SCDEW, OES, WI

Low-skilled jobs often have commensurate (i.e. low) pay and do not require much education, experience, or OJT. Does the supply of workers have the right skills for the jobs in the future?

WORKFORCE CHALLENGES

The current economic situation in the Upstate LWIA, the supply of workers, and the characteristics of workers who will be in demand has been reviewed. What can be gleaned from these findings? Are there gaps between supply and demand?

Supply Findings

Although the population should grow to 2030, a smaller-than-the-state share of 20-34 year olds in their prime working age, this area looks to have a challenge in having a proper mix of workers. In addition, in-migration from other states/countries adds few residents at the top end of the educational spectrum. The LWIA has a lower percent of residents aged 25 and older with at least a bachelor's degree than the state does as a whole.

Many students selected the Health Science career cluster in keeping with state trends. The next most popular career cluster was Arts, Audio/Video/Technology, and Communications.

Demand Findings

Employer demand was consistent between online advertisements (current) and 2018 projected occupations (long-term needs) in general. Both had the need for workers in Marketing, Sales, and Service; and Business, Management, and Administration. Health Science was a short-term need, while Hospitality and Tourism and Manufacturing were long-term needs. Almost all of the top projected growing occupations require at least a high school diploma or GED.

Figure 29: Comparison of Supply and Demand

	Demand		Supply	
	Top online ads	Projected Occupations	Degrees Earned	Career Clusters Selected
Agriculture, Food and Natural Resource	1.4	2.3	0.9	3.4
Architecture and Construction	5.7	5.8	0.3	5.7
Arts, Audio/Video Technology and Communications	1.6	1.2	2.2	12.7
Business, Management and Administration	13.9	15.4	19.2	5.4
Education and Training	1.6	6.1	31.4	7.3
Finance	3.6	2.0	0.5	1.1
Government and Public Administration	0.1	0.2	1.4	1.0
Health Science	21.4	9.6	18.4	23.6
Hospitality and Tourism	4.1	12.9	0.4	1.8
Human Service	3.3	4.9	4.8	7.0
Information Technology	4.5	1.4	4.4	3.4
Law, Public Safety, Corrections and Security	0.8	2.2	2.8	9.0
Manufacturing	6.3	12.3	4.4	3.4
Marketing, Sales and Service	16.7	14.0	0.5	0.6
Science, Technology, Engineering and Mathematics	5.4	1.5	8.2	9.8
Transportation, Distribution, and Logistics	9.6	8.1	0.3	4.8

Source: BLS, SCDEW, WI, SC Department of Education, OES, HWOL

A few observations about the comparison that could be considered challenges to the workforce pipeline include:

- There are currently more open jobs than graduates to fill them in Architecture and Construction; Marketing, Sales and Service; and Transportation, Distribution, and Logistics.
- There are many post-secondary degrees being earned by area graduates in Business, Management, and Administration and Education and Training that exceed short-term demand in the LWIA. Possibly the glut in Business graduates could help supply the need for workers in the related field of Marketing, Sales, and Service.
- There is an overabundance of Arts, Audio/Video Technology and Communication; Health Science; Science, Technology, Engineering, and Math; and Law, Public Safety, Corrections and Security clusters selected by students that will far outpace the LWIA's long-term demand.
- There are too few students in Business, Management, and Administration; Hospitality and Tourism; Manufacturing; and Marketing, Sales and Service to meet long-term demand.

There is always a demand for employees with soft skills. It is said that hard skills (training, degrees, or certification) get you hired, but soft skills get you fired. Many of our residents need to learn or get a refresher in soft skills in order to KEEP their jobs. Employers see the need.

Top 10 Soft Skills Found in Online Ads for South Carolina (April 2013)

1. Oral and written communication skills
2. Customer Service Oriented
3. Problem solving
4. Detail oriented
5. Microsoft Office
6. Self-starting / Self-motivated
7. Organizational skills
8. Troubleshooting
9. Work independently
10. Sales experience

Source: The Conference Board Help Wanted OnLine® Data Series (HWOL)

CONCLUSION

The Upstate LWIA area overall encompasses an economy dependent on manufacturing, health care, and retail trade. The population continues to increase, but the education level for the population is lower than the state as a whole at the high end with lower percentages of residents with bachelor's degree or higher. The workforce (current and potential) does face challenges in having the proper mix of employer demand being met by trained applicants. The majority of employers are advertising for jobs in health care; business, management, and administration; and marketing and sales. However, some supply flows could be fine-tuned to be more in line with demand.

The data shows that in the area:

- There is an undersupply of today's students choosing the fields of Business, Management and Administration; Hospitality and Tourism; Manufacturing; Transportation, Distribution, and Logistics; and Marketing, Sales and Service to meet the LWIA's future demand.
- There is an oversupply of today's students choosing the areas of Arts, Audio/Video Technology and Communication; Law, Public Safety, Corrections and Security; Science, Technology, Engineering and Mathematics; and Health Science that will far outpace the area's long-term demand.
- Comprehensive soft skills training is needed for all students and job seekers (high school, post-secondary, adult, new and returning entrants to the labor force, and incumbent workers) so that they can not only get hired but retain their positions and thus reduce employee turnover.

Getting education in line with the demands of employers will help the Upstate LWIA meet the challenges it faces.

WACCAMAW LWIA WORKFORCE REPORT 2012



The *Waccamaw Workforce Report* is published by the Labor Market Information (LMI) Department of the South Carolina Department of Employment and Workforce. The information and analyses provided in this publication are based on data collected from sources throughout South Carolina and the United States.

About SC DEW and LMI:

The Labor Market Information Department compiles and publishes employment statistics, job forecasts, wage data, demographics, and other labor market information to help public and private organizations, researchers, and others better understand today's complex workforce.

The LMI Department produced this report under the leadership of:

Executive Director - Cheryl Stanton
Interim Deputy Assistant Executive Director - Kerry Paul
Labor Market Information Director - Brenda Lisbon

South Carolina Department of Employment and Workforce
1550 Gadsden Street
Columbia, South Carolina 29201
(803) 737-2660
www.dew.sc.gov
www.scworkforceinfo.com



TABLE OF CONTENTS

EXECUTIVE SUMMARY	VI
INTRODUCTION	VII
ECONOMIC DISCUSSION: A CURRENT PICTURE OF THE WORKFORCE	1
EMPLOYMENT BY INDUSTRY	1
LOCATION QUOTIENT	1
AVERAGE ANNUAL WAGE BY INDUSTRY	2
OCCUPATIONAL EMPLOYMENT	3
SKILLS DATA.....	4
EMPLOYMENT AND UNEMPLOYMENT	6
NEW STARTUP FIRMS	8
EMPLOYERS BY SIZE OF ESTABLISHMENT	9
SUPPLY: WHAT'S OUT THERE?	10
POPULATION BY AGE	10
POPULATION CHANGE AND MIGRATION	11
COMMUTING PATTERNS	12
EDUCATIONAL ATTAINMENT	12
CAREER CLUSTERS SELECTED BY HIGH SCHOOL STUDENTS	13
DEGREES AWARDED	15
CHARACTERISTICS OF UI CLAIMS BY OCCUPATION	16
UNEMPLOYMENT INSURANCE CLAIMANT CHARACTERISTICS.....	17
DEMAND: WHAT DO WE NEED?	20
ONLINE JOB ADVERTISEMENTS.....	20
INDUSTRY PROJECTIONS	20
OCCUPATIONAL PROJECTIONS.....	21
SKILLS OF PROJECTED OCCUPATIONS	24
WORKFORCE CHALLENGES	25
CONCLUSION	27

TABLE OF FIGURES

FIGURE 1: WACCAMAW LWIA EMPLOYMENT BY INDUSTRY - 3RD QUARTER 2012	1
FIGURE 2: NOTABLE WACCAMAW LWIA LOCATION QUOTIENTS - 2011	2
FIGURE 3: ANNUAL AVERAGE WAGE BY INDUSTRY - 3RD QUARTER 2012.....	3
FIGURE 4: TOP 20 OCCUPATIONS WITH WAGES - 2012.....	4
FIGURE 5: TOP OCCUPATIONS BY SKILL CLASSIFICATION - WACCAMAW 2012.....	5
FIGURE 6: EMPLOYMENT - 2002-2012.....	6
FIGURE 7: UNEMPLOYMENT - 2002-2012	7
FIGURE 8: ANNUAL UNEMPLOYMENT - 2002-2012	8
FIGURE 9: MONTHLY UNEMPLOYMENT RATE - MARCH 2011-APRIL 2013.....	8
FIGURE 10: NEW STARTUP FIRMS - 2007-2012.....	9
FIGURE 11: EMPLOYERS BY SIZE OF ESTABLISHMENT - 3RD QUARTER 2012.....	9
FIGURE 12: POPULATION BY AGE	10
FIGURE 13: POPULATION PROJECTIONS TO 2030.....	11
FIGURE 14: POPULATION MIGRATION - 2011 - 5-YEAR ESTIMATE.....	11
FIGURE 15: COMMUTING PATTERNS - 2010.....	12
FIGURE 16: EDUCATIONAL ATTAINMENT - WACCAMAW AND SOUTH CAROLINA 2011.....	12
FIGURE 17: EDUCATIONAL ATTAINMENT - WACCAMAW 2011	13
FIGURE 18: PERCENT OF STUDENTS DECLARING A CAREER CLUSTERS IN WACCAMAW AND SC - 2012	14
FIGURE 19: CAREER CLUSTERS - 2012.....	15
FIGURE 20: TOP 20 MAJORS IN WACCAMAW - 2011	16
FIGURE 21: CHARACTERISTICS OF UI CLAIMS BY OCCUPATION - APRIL 2013.....	17
FIGURE 22: UI CLAIMANT CHARACTERISTICS - APRIL 2013.....	18
FIGURE 23: WACCAMAW HWOL - APRIL 2013 BY MAJOR GROUP	20
FIGURE 24: INDUSTRY PROJECTIONS - 2008-2018	21
FIGURE 25: GROWING OCCUPATIONS - 2008-2018.....	22
FIGURE 26: EDUCATION FOR TOP 50 PROJECTED OCCUPATIONS	23
FIGURE 27: TOP 20 PROJECTED DECLINING OCCUPATIONS IN WACCAMAW - 2008-2018.....	24
FIGURE 28: SKILL LEVELS.....	24
FIGURE 29: COMPARISON OF SUPPLY AND DEMAND.....	25

EXECUTIVE SUMMARY

The employment leaders for Waccamaw Local Workforce Investment Area (LWIA) are Accommodation and Food Services and Retail Trade. Employment growth is anticipated by 2018 in these industries as well. The highest wages are paid by the Utilities and Mining industries.

The area's population grew by 25 percent since 2000, but it has fewer residents aged 20 to 39 than the state's average.

Employment is rising, and unemployment is declining. Waccamaw has historically had unemployment rates about the same as the state but exceeded the state's rates during and after the recession. Employment is concentrated in the Grand Strand and Myrtle Beach area, and nearly 2,700 more people enter the area for work than leave it every day. Accommodation and Food Services is the largest industry represented in unemployment claims.

Waccamaw has a higher proportion of residents with a high school diploma to associate's degree education than the state does as a whole. For projected future growing jobs, 4 percent require no diploma, 32 percent require a diploma, 24 percent require an associate's degree or training, and 40 percent require a bachelor's degree or higher.

Waccamaw businesses desire a trained workforce for the tasks demanded. The area relies heavily on the seasonal business that tourism brings in warmer months, but efforts are being made to bring in more diverse and larger companies. A challenge for the area is to match the skill levels of the workforce with open positions. There may be a mismatch between the employer's skill demands and the occupations that the worker will accept.

Waccamaw LWIA has several factors working in its favor. It has the Grand Strand and Myrtle Beach, technical and traditional colleges available for students and workers, and it has access to waterways and shipping. Warm weather brings another opportunity for a great tourism cycle that will balloon coffers for the lean times.

The patterns and trends described in this report offer cause for both optimism and concern. Waccamaw LWIA has an exciting future ahead of it, and can lead the way in delivering the skilled talent and economic opportunities that businesses and workers in the area deserve.

INTRODUCTION

The Waccamaw Local Workforce Investment Area is composed of Georgetown, Horry, and Williamsburg counties. Waccamaw is located in the eastern part of the state and borders the Atlantic Ocean, featuring forests, swamps, and beaches. The Lumber, Great Pee Dee, Little Pee Dee, Santee, and Waccamaw Rivers make their way through the area. Economic history includes agriculture (rice, indigo, and tobacco), naval stores, and lumber; modern industries focus on tourism, lumber, and manufacturing.

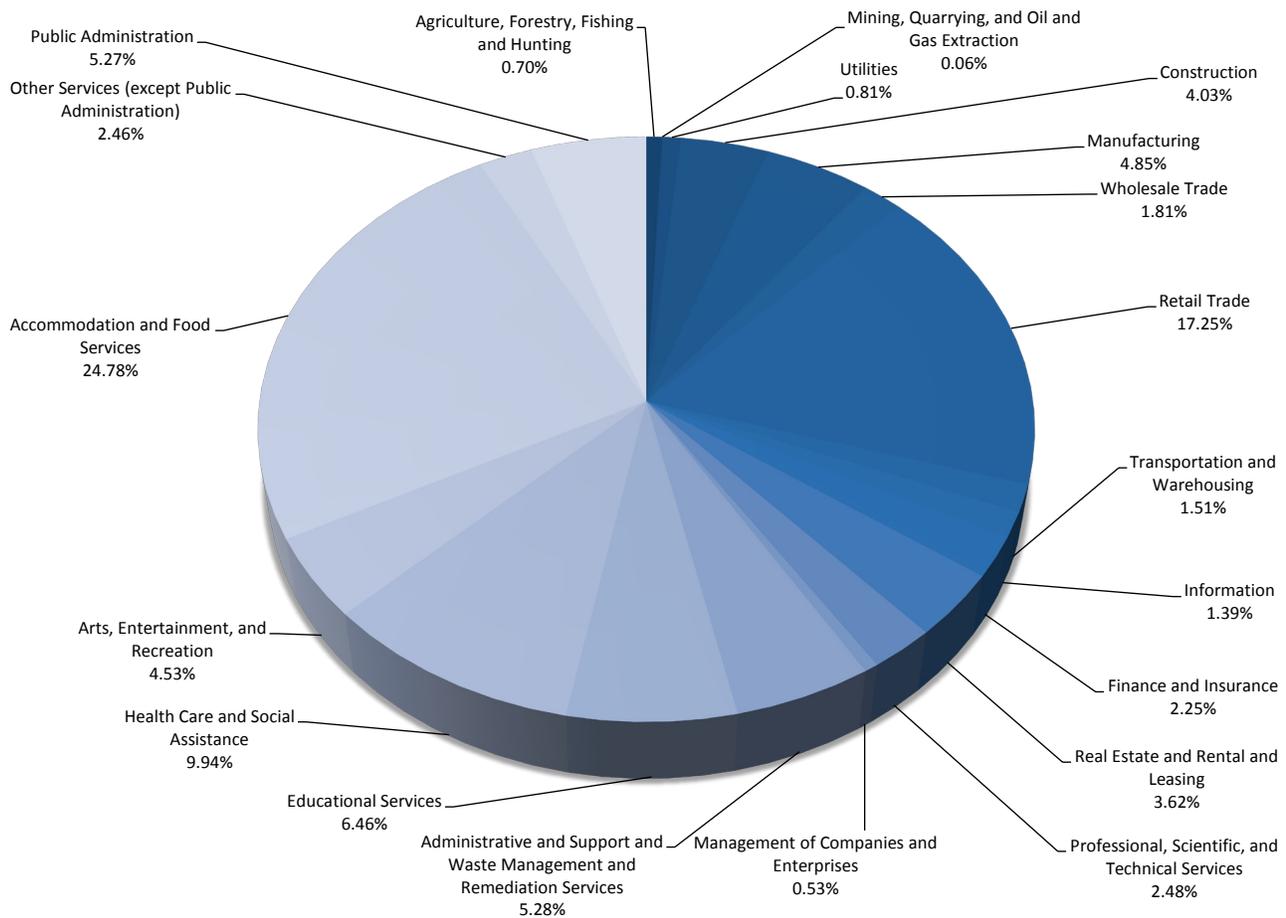
The economic changes this year in Waccamaw demonstrate the shifting needs of employers and employees. Cultivating an understanding of the workforce allows all three counties to respond to anticipated future needs. Analyses help to identify the gap between what the workforce has in the way of talent and skills (supply), and what it may need in the future (demand).

The purpose of the Waccamaw Workforce Report is to present a comprehensive view of the status of Waccamaw's economy and workforce. The report includes an analysis of Waccamaw's workforce, industries, economic climate, and factors that will affect all. Forecasts will be made for the workforce, industries, and the economy.

ECONOMIC DISCUSSION: A CURRENT PICTURE OF THE WORKFORCE

EMPLOYMENT BY INDUSTRY

Figure 1: Waccamaw LWIA Employment By Industry - 3rd Quarter 2012



Source: Bureau of Labor Statistics (BLS), SC Department of Employment & Workforce (SCDEW), Quarterly Census of Employment and Wages (QCEW)

Accommodation and Food Services and Retail Trade are the top two industries employing workers in Waccamaw. Industries like Educational Services and Health Care and Social Assistance are healthy and flourishing, while others like Construction are still recovering from the recession. The 2010 per capita income for a Waccamaw resident was \$30,476, which was an increase of 38 percent from 2000.¹ Economic growth has taken place in the past decade to enhance the workforce, although the area is still recovering from a tough business cycle.

LOCATION QUOTIENT

A location quotient (LQ) is a useful tool for determining the concentration of workers in a given area. Location quotients compare the regional share of employment in a particular industry to the national share of employment in the same industry. The resulting quotient reveals the degree of regional specialization or concentration in an industry and provides insight into what makes the area unique in comparison to the national average. An LQ of 1.0 means the concentration of jobs in that industry matches the nation's value. Location quotients higher than 1.0 indicate the level of specialization the area has in particular sectors. Lower quotients can indicate possible industries that could be expanded.

Figure 2: Notable Waccamaw LWIA Location Quotients - 2011

Industry and Sectors	Location Quotient
<i>Georgetown County</i>	
Forestry and Logging	38.3
Primary Metal Manufacturing	4.2
Building Construction	3.8
<i>Horry County</i>	
Accommodation	6.0
Amusements, Gambling, and Recreation	3.2
Clothing and Clothing Accessories Stores	3.1
<i>Williamsburg County</i>	
Forestry and Logging	25.4
Plastic and Rubber Products Manufacturing	9.4
Apparel Manufacturing	7.9

Source: US Department of Labor, Bureau of Labor Statistics - http://data.bls.gov/location_quotient

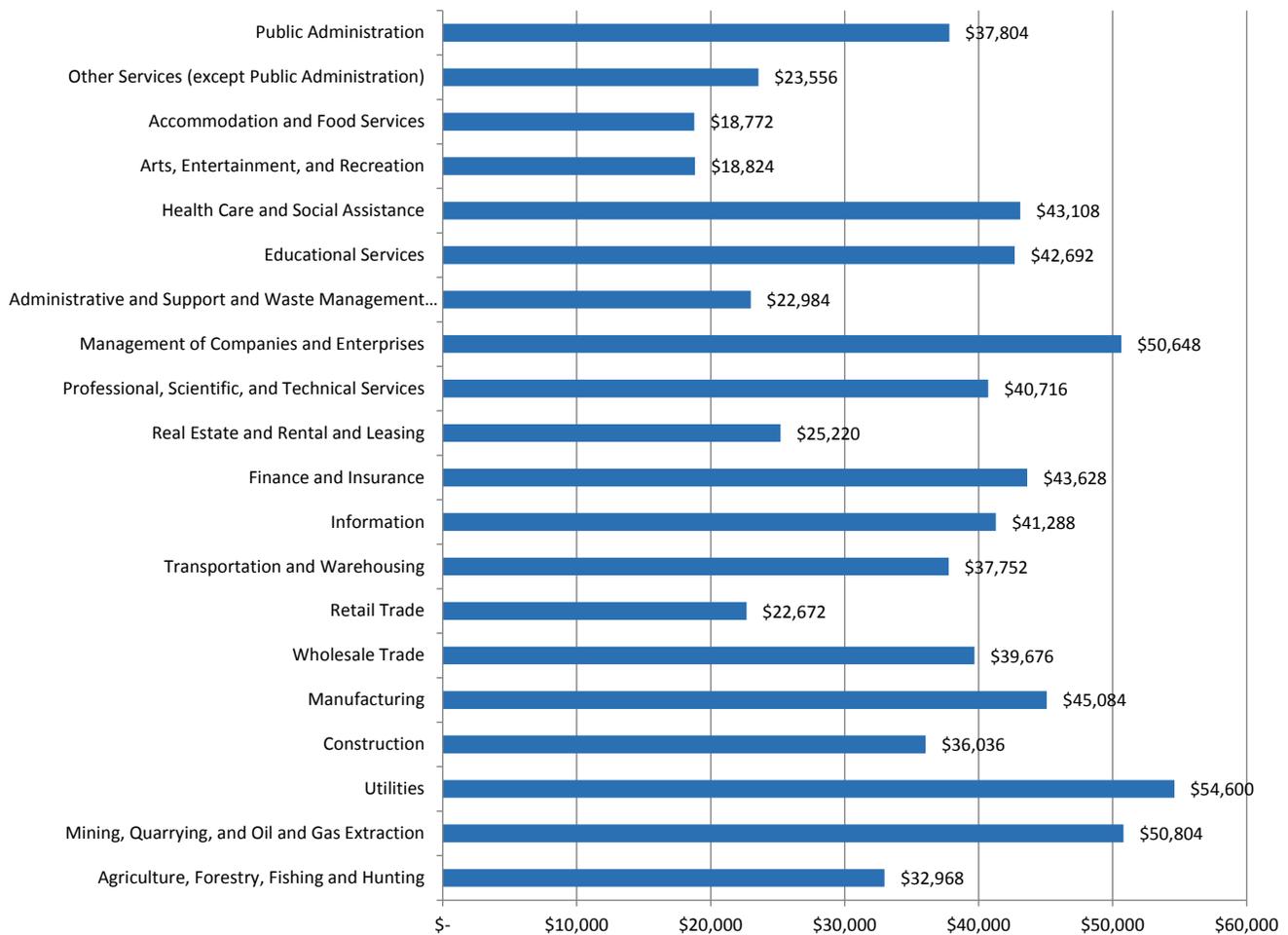
The Forestry and Logging industry tops the most concentrated sector in this area with location quotients over 25 in Georgetown and Williamsburg counties. Manufacturing industries located in those two counties include Apparel, Primary Metal, and Plastics and Rubber Products. The Accommodation sector is the most concentrated in Horry County followed by Amusements, Gambling, and Recreation and Clothing and Clothing Accessories Stores.

AVERAGE ANNUAL WAGE BY INDUSTRY

The annual wages for the Utilities sector employees are the highest for any industry. Utility workers have a wide range of education (high school diploma to PhD) and tend to stay in their jobs for a very long time, which increases the average wage as small raises accumulate over time. Mining, Quarrying, and Oil and Gas Extraction workers are the second highest paid group of employees in the area, followed by the Management of Companies and Enterprises group.

High wage industries like Professional, Scientific, and Technical Services, and Finance and Insurance usually require at least a bachelor’s degree. Having an education is an excellent way to enter a high-wage industry and have more options for employment.

Figure 3: Annual Average Wage by Industry - 3rd Quarter 2012



Source: BLS, SCDEW, QCEW

OCCUPATIONAL EMPLOYMENT

When examining the current occupational employment in the area, one can observe that some of the top 20 occupations are low-skill, low-pay jobs. These jobs, like Cashiers, Waiters and Waitresses, and Food Preparers, have high turnover. These are not necessarily the most robust jobs as far as wages, but they are jobs.

Figure 4 lists occupations, such as Registered Nurses, General Managers, and First-Line Supervisors, that pay a higher wage. With Accommodation and Food Services; Retail Trade; and Health Care and Social Assistance sectors comprising over half of the employment in Waccamaw, the positions of Food Preparers and Servers; Maids and Housekeeping Cleaners; Retail Salespersons; and Registered Nurses, not surprisingly, are listed among the top occupations.

Figure 4: Top 20 Occupations with Wages - 2012

Occupational Title	Total Employment	Hourly Average Wage (\$)
All Occupations	110,610	15.25
Retail Salespersons	7,330	10.62
Cashiers	5,660	8.78
Waiters and Waitresses	5,170	8.70
Maids and Housekeeping Cleaners	3,930	8.62
Combined Food Preparation and Serving Workers, Including Fast Food	2,630	8.47
Cooks, Restaurant	2,350	9.23
Landscaping and Groundskeeping Workers	2,160	9.64
First-Line Supervisors of Retail Sales Workers	1,960	18.05
Stock Clerks and Order Fillers	1,900	10.15
Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	1,840	14.08
Customer Service Representatives	1,810	12.05
Office Clerks, General	1,800	12.43
Janitors and Cleaners, Except Maids and Housekeeping Cleaners	1,790	10.89
Registered Nurses	1,720	27.45
Maintenance and Repair Workers, General	1,590	13.28
General and Operations Managers	1,480	41.73
Bookkeeping, Accounting, and Auditing Clerks	1,480	15.55
Cooks, Fast Food	1,450	8.56
First-Line Supervisors of Food Preparation and Serving Workers	1,380	13.34
Hotel, Motel, and Resort Desk Clerks	1,280	9.87

Source: BLS, SCDEW, Occupational Employment Statistics (OES)

SKILLS DATA

Employers are beginning to see that a person’s skills, in addition to their education, may help in determining who to hire. Many times the degree is not as important as the skills gained through specialized training and/or experience. In order to be able to determine the current level of skills in the area, the top 50 current occupations by employment are presented, and assigned a low, middle, or high skill designation to that occupation. The definitions for those skills levels are:

- **LOW:** No high school or GED, or high school/GED with less than one year experience and no on-the-job-training (OJT), or short-term OJT
- **MIDDLE:** High school/GED with one year experience, or moderate OJT, or long-term OJT, or apprenticeship, or postsecondary vocational training, or some college, or associate’s degree, or less than a bachelor’s degree
- **HIGH:** Bachelor’s degree or higher

In the Waccamaw area, 32 of the top 50 jobs in 2012 are considered low-skill jobs. Seventeen are middle skill, and one is a high-skill occupation.

Figure 5: Top Occupations By Skill Classification - Waccamaw 2012

Skillset: LOW
Amusement and Recreation Attendants
Bartenders
Cashiers
Combined Food Preparation and Serving Workers, Including Fast Food
Construction Laborers
Cooks, Fast Food
Cooks, Institution and Cafeteria
Cooks, Restaurant
Counter and Rental Clerks
Counter Attendants, Cafeteria, Food Concession, and Coffee Shop
Customer Service Representatives
Dining Room and Cafeteria Attendants and Bartender Helpers
Dishwashers
Driver/Sales Workers
Food Preparation Workers
Hosts and Hostesses, Restaurant, Lounge, and Coffee Shop
Hotel, Motel, and Resort Desk Clerks
Janitors and Cleaners, Except Maids and Housekeeping Cleaners
Laborers and Freight, Stock, and Material Movers, Hand
Landscaping and Groundskeeping Workers
Laundry and Dry-Cleaning Workers
Light Truck or Delivery Services Drivers
Maids and Housekeeping Cleaners
Office Clerks, General
Receptionists and Information Clerks
Retail Salespersons
Secretaries and Administrative Assistants, Except Legal, Medical, and Executive
Security Guards
Stock Clerks and Order Fillers
Teacher Assistants
Tellers
Waiters and Waitresses
Skillset: MIDDLE
Bookkeeping, Accounting, and Auditing Clerks
Bus Drivers, School or Special Client
Carpenters
Firefighters
First-Line Supervisors of Food Preparation and Serving Workers
First-Line Supervisors of Office and Administrative Support Workers
First-Line Supervisors of Retail Sales Workers
General and Operations Managers
Heavy and Tractor-Trailer Truck Drivers
Licensed Practical and Licensed Vocational Nurses
Maintenance and Repair Workers, General
Nursing Assistants
Police and Sheriff's Patrol Officers
Real Estate Sales Agents
Registered Nurses
Sales Representatives, Wholesale and Manufacturing, Except Technical and Scientific Products
Team Assemblers
Skillset: HIGH
Accountants and Auditors

Source: BLS, SCDEW, Workforce Intelligence (WI)

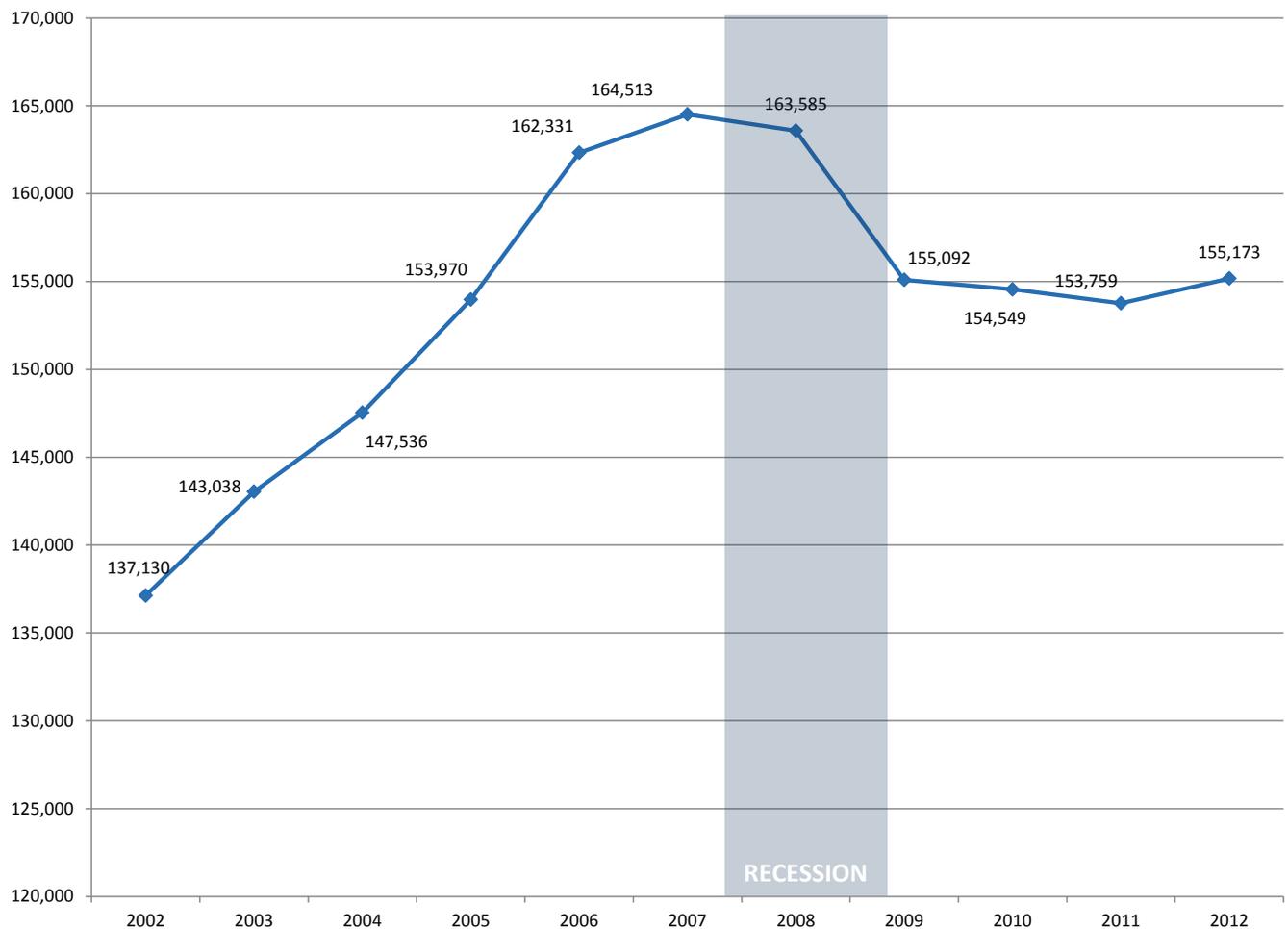
EMPLOYMENT AND UNEMPLOYMENT

A crucial indicator of the health of a workforce is its labor force levels. Labor force data count residents who are employed and unemployed. There are a few Federal definitions that will make discussion of the labor force a little easier to understand.

- Employed: Persons 16 years old or older who worked for pay any time during the week that includes the 12th of the month
- Unemployed: Persons 16 years old or older who are not working but want a job, and are able and willing to work
- Labor Force: Employed plus unemployed
- Unemployment Rate: Unemployment divided by labor force

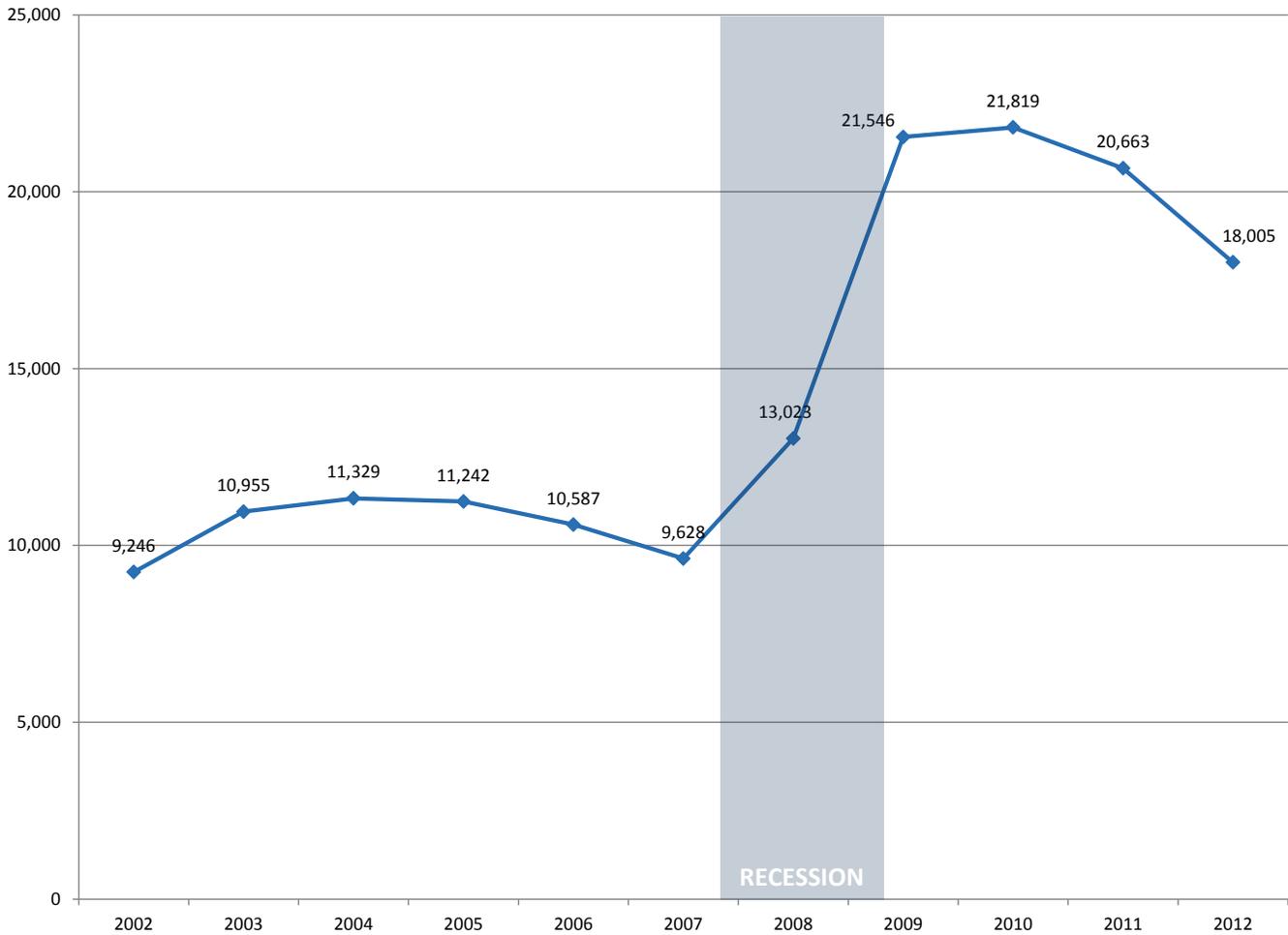
In Figure 6, the recession (officially from December 2007 through June 2009) had a great effect on the labor force. Employment dropped, and unemployment increased by 124 percent.

Figure 6: Employment - 2002-2012



Source: BLS, SCDEW, Local Area Unemployment Statistics (LAUS)

Figure 7: Unemployment - 2002-2012

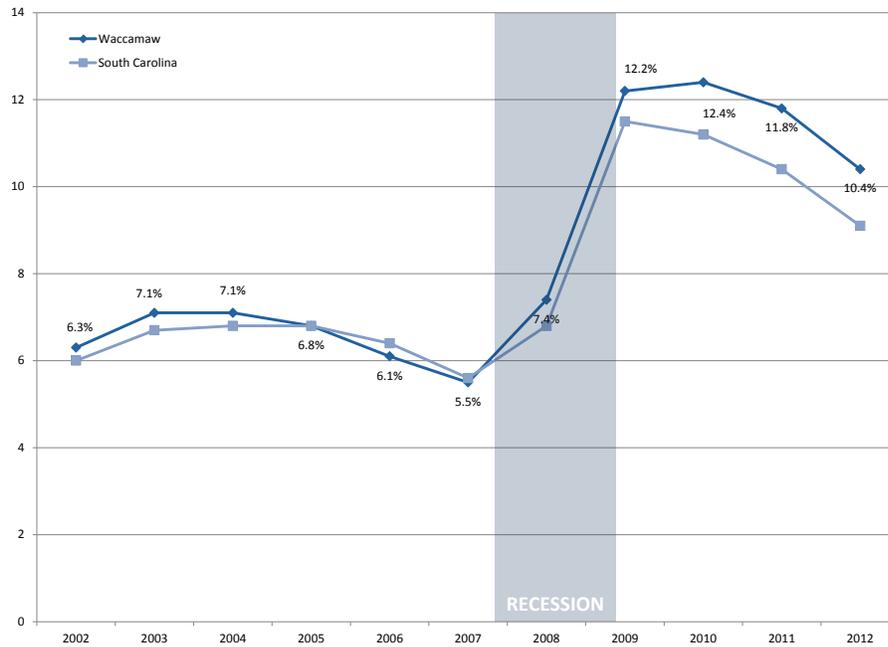


Source: BLS, SCDEW, LAUS

Tracking annual unemployment rates give a good snapshot of the state of an area's workforce. Annual rates smooth out the usual ups and downs of a month-to-month rate (due to normal seasonal or cyclical changes) to give a more accurate picture.

Figure 8 shows the annual rates for the Waccamaw area and South Carolina. Waccamaw's rate has historically been about the same as the state's rate but exceeded it during and after the recession. During the recession, the Waccamaw rate more than doubled from 5.5 percent in 2007 to 12.2 percent in 2009.

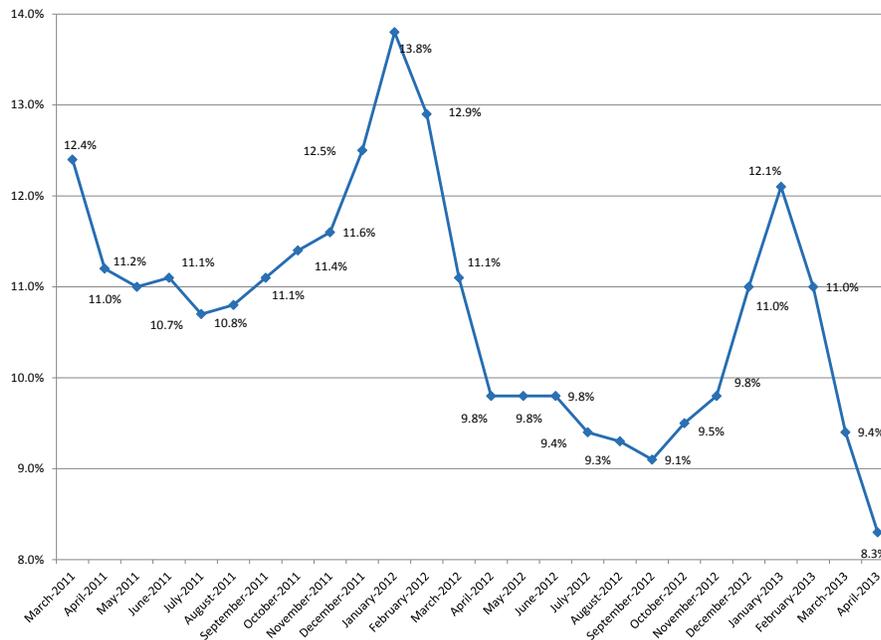
Figure 8: Annual Unemployment - 2002-2012



Source: BLS, SCDEW, LAUS

Figure 9 illustrates that the monthly unemployment rate has seen wide fluctuations since March 2011. The area seems to be steadily recovering from the recession.

Figure 9: Monthly Unemployment Rate - March 2011-April 2013



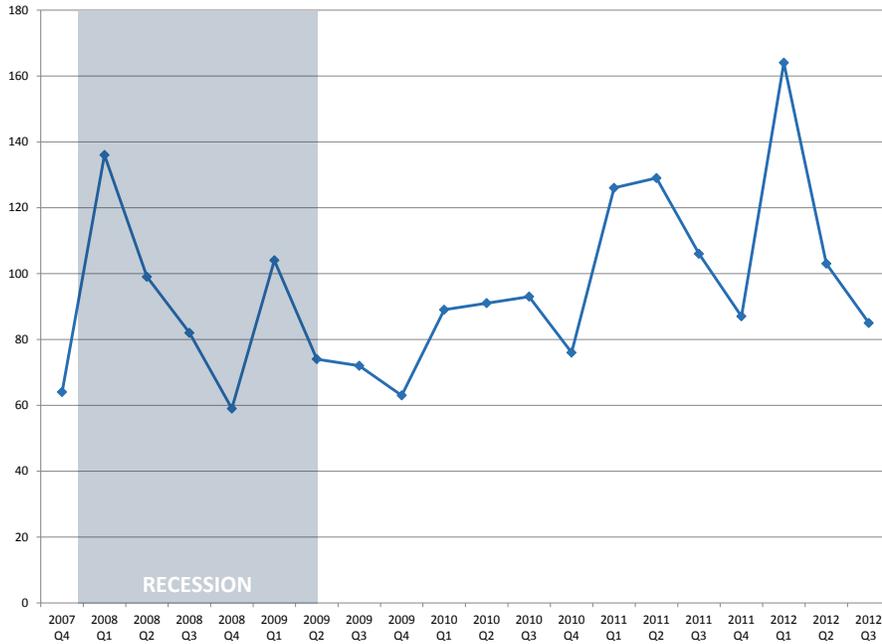
Source: BLS, SCDEW, LAUS

NEW STARTUP FIRMS

One way to see if an economy is improving is to examine data about startup firms. An increase in new companies might be an indicator of expansion in the area, whereas a drop in new firms shows a lack of confidence in the future. (Note: There is almost always a spike in startups in the first quar-

ter of the year.) Again, the recession had a major impact on normal business birth and death rates. Startups have been steadily increasing in the area after the recession with a large increase in early 2012.

Figure 10: New Startup Firms - 2007-2012



Source: BLS, SCDEW, QCEW

EMPLOYERS BY SIZE OF ESTABLISHMENT

By far, the largest category of business size in the area is small business. Small businesses (or establishments) are defined in South Carolina as companies employing 49 or fewer people. Waccamaw has 94 percent of establishments designated as small businesses, and the state as a whole has 93 percent.

Small businesses may need more support and assistance than larger companies because they may not have the resources to man a human resources department. They may rely on other options, such as SC Works Centers, for help with hiring, training, or screening job candidates.

Figure 11: Employers by Size of Establishment - 3rd Quarter 2012

Employees	Waccamaw	South Carolina
0 to 4	5,363	63,766
5 to 9	1,910	19,667
10 to 19	1,272	13,316
20 to 49	938	9,881
50 to 99	326	3,907
100 to 249	188	2,433
250 to 499	31	757
500 to 999	9	328
1000 +	7	264

Source: BLS, SCDEW, QCEW

SUPPLY: WHAT'S OUT THERE?

A manufacturing assembly line needs to have resources and supplies on-hand so that the line does not have to stop. The same is true for the workforce. The supply of workers needs to be of the right quantity and quality to do the job. Is the supply of workers in line with what the companies in Waccamaw need? Seven streams of workforce supply provide an indication: population, commuting, education of the population, clusters of high school students, awards earned at higher education institutions, and characteristics of unemployment insurance claims and claimants.

POPULATION BY AGE

Age distribution in the area is similar to the state and the country for a few segments of the population. However, in the under age 39 cohorts, Waccamaw has a notably lower proportion of population than the state as a whole does, and in the 55-84 age cohorts, the area has a higher proportion of population than the state.

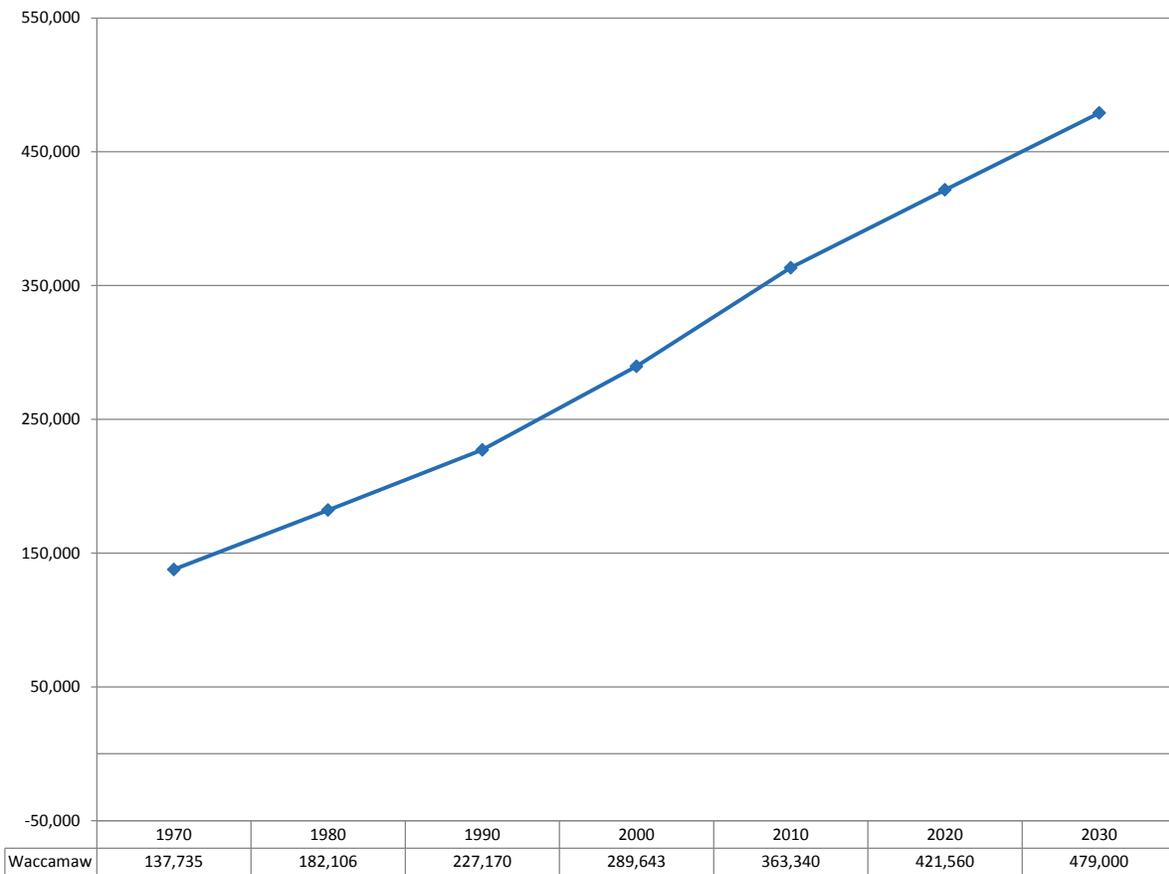
Figure 12: Population by Age

Age Range	Waccamaw	SC	US
0-4	5.7%	6.5%	6.6%
5-9	5.8%	6.4%	6.6%
10-14	5.7%	6.5%	6.7%
15-19	6.2%	7.2%	7.2%
20-24	6.5%	7.2%	7.0%
25-29	6.1%	6.6%	6.8%
30-34	5.9%	6.2%	6.4%
35-39	5.7%	6.5%	6.6%
40-44	6.8%	6.8%	7.0%
45-49	7.0%	7.2%	7.4%
50-54	6.9%	7.0%	7.2%
55-59	7.4%	6.5%	6.3%
60-64	7.3%	5.9%	5.3%
65-69	5.8%	4.5%	3.9%
70-74	4.5%	3.3%	3.0%
75-79	3.1%	2.5%	2.4%
80-84	2.0%	1.7%	1.9%
85 and older	1.5%	1.5%	1.7%

Source: US Bureau of Census, American Community Survey (ACS)

POPULATION CHANGE AND MIGRATION

Figure 13: Population Projections to 2030



Source: US Census Bureau, Census 2000, SC Department of Health and Environmental Control - Vital Records Department. Population projections calculated by SC Budget and Control Board, Office of Research and Statistics

After a rapid increase in population from 1990 to 2000 (up 27.5 percent), the growth of the population of this area continued, growing by 25 percent over the next 10 years. Growth is projected to increase about 1.5 percent per year to 2030.

Figure 14: Population Migration - 2011 - 5-Year Estimate

	Total	Moved From Different State	Moved From Abroad	Moved From Different County	Moved Within Same County
Population 1 year and over	380,888	4.0%	0.4%	1.6%	7.3%
Hispanic or Latino origin (of any race)	18,960	7.1%	3.8%	2.8%	7.2%
White alone, not Hispanic or Latino	268,519	4.4%	0.3%	1.3%	6.8%
Population 25 Years and Over					
Less than high school graduate	37,528	3.5%	0.6%	1.7%	6.7%
High school graduate/GED	93,950	3.1%	0.2%	1.3%	6.0%
Some college or associate's degree	79,607	3.7%	0.2%	1.3%	6.0%
Bachelor's degree	35,298	4.4%	0.4%	1.1%	4.3%
Graduate or professional degree	19,633	3.3%	0.6%	1.3%	4.5%

Source: US Census Bureau, ACS, SCDEW

In-migration (people moving into Waccamaw) shows that just under 4 percent of residents with a graduate degree and nearly 5 percent of those with a bachelor’s degree came from out of state or out of the country. While a higher percent of Hispanics moved into Waccamaw from a different state than Whites, they moved into Waccamaw from abroad at more than 10 times the rate of Whites. Though over 13 percent of residents over the age of one moved, only 4.4 percent came from outside of South Carolina.

COMMUTING PATTERNS

The vast majority of the workers (86 percent) of Waccamaw lives and works in the area. The tables in Figure 15 show that 13,000 workers commute in from other areas to work in Waccamaw. Florence County draws a notable portion of residents out of the area to work. Nearly 2,700 more employees commute into the area than leave it to work.

Figure 15: Commuting Patterns - 2010

To Waccamaw WIA From	13,013	From Waccamaw WIA To	10,340
Florence County, SC	2,542	Florence County, SC	2,454
Columbus County, NC	2,315	Marion County, SC	974
Brunswick County, NC	2,285	Brunswick County, NC	874
Marion County, SC	1,886	Charleston County, SC	799
		Berkeley County, SC	510

Source: US Census Bureau, ACS

EDUCATIONAL ATTAINMENT

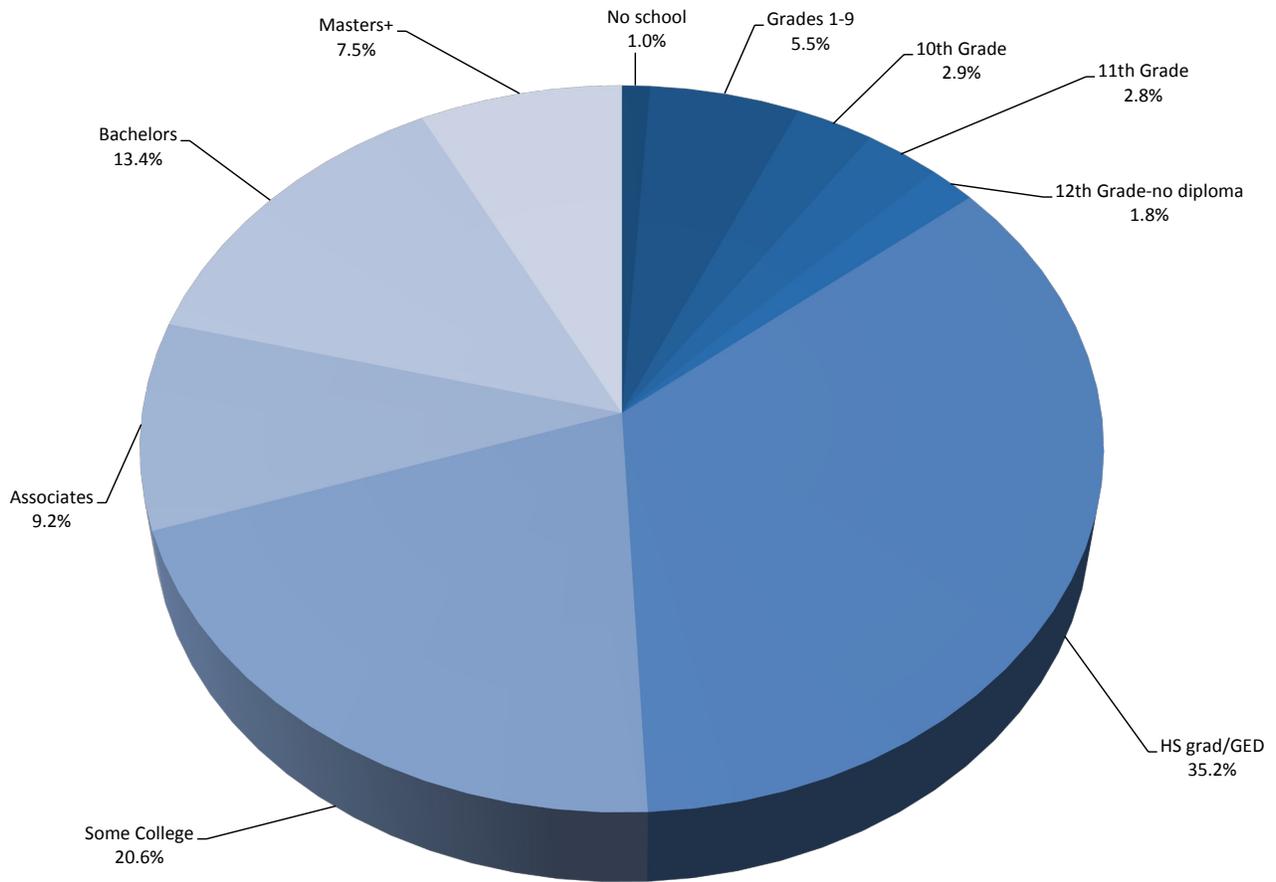
Waccamaw has a lower concentration of residents with less than an eleventh grade education than the state as a whole and a higher concentration with a high school diploma, with some college, or with an associate’s degree than the state as a whole. It also has a notably lower percent of residents with a bachelor’s degree or higher than the state does.

Figure 16: Educational Attainment - Waccamaw and South Carolina 2011

Education Level	Waccamaw	SC
No school	1.0	1.1
Grades 1-9	5.5	7.0
10th Grade	2.9	3.3
11th Grade	2.8	3.2
12th Grade-no diploma	1.8	1.8
HS grad/GED	35.2	30.9
Some College	20.6	20.1
Associates	9.2	8.4
Bachelors	13.4	15.6
Masters+	7.5	8.6

Source: US Census Bureau, ACS, SCDEW

Figure 17: Educational Attainment - Waccamaw 2011

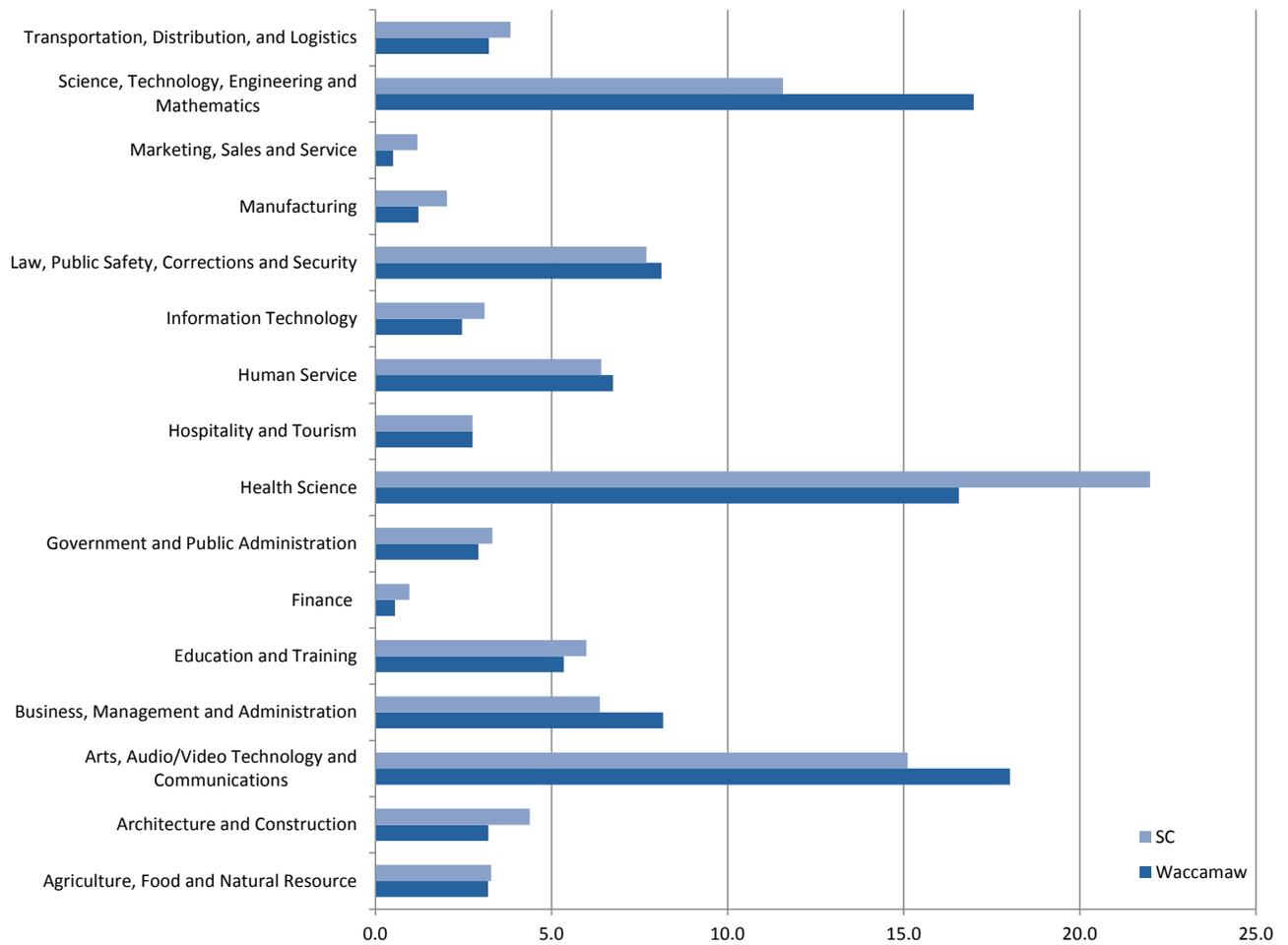


Source: US Census Bureau, ACS, SCDEW

CAREER CLUSTERS SELECTED BY HIGH SCHOOL STUDENTS

Eighth-grade students in South Carolina are required to choose a career cluster to lead them to a post-high school job or college major. There are 16 career clusters.

Figure 18: Percent of Students Declaring a Career Clusters In Waccamaw and SC - 2012



Note: Declared clusters for students declaring a specific cluster on their primary Electronic Individual Graduation Plan (e-IGP) for 2011-2012 year

Source: SC Department of Education

The Arts, Audio/Video Technology and Communications career cluster is the top choice for students in the Waccamaw area. In keeping with the state trend, the area’s students also picked the Science, Technology, Engineering and Mathematics (STEM) cluster in notable numbers. The Health Science cluster is a choice for many students, likely in response to news of a shortage of healthcare workers in South Carolina.

Figure 19: Career Clusters - 2012

Cluster	Waccamaw	SC
Agriculture, Food and Natural Resource	3.2	3.3
Architecture and Construction	3.2	4.4
Arts, Audio/Video Technology and Communications	18.0	15.1
Business, Management and Administration	8.2	6.4
Education and Training	5.3	6.0
Finance	0.6	1.0
Government and Public Administration	2.9	3.3
Health Science	16.6	22.0
Hospitality and Tourism	2.8	2.8
Human Service	6.7	6.4
Information Technology	2.5	3.1
Law, Public Safety, Corrections and Security	8.1	7.7
Manufacturing	1.2	2.0
Marketing, Sales and Service	0.5	1.2
Science, Technology, Engineering and Mathematics	17.0	11.6
Transportation, Distribution, and Logistics	3.2	3.8

Source: SC Department of Education

DEGREES AWARDED

In higher education, Waccamaw area colleges and universities have conferred a wide variety of awards. Of the top 20, Registered Nursing and Liberal Arts and Sciences are the most popular followed by Management. The institutions included in this data are Coastal Carolina University, Horry-Georgetown Technical College, and Williamsburg Technical College.

Figure 20: Top 20 Majors in Waccamaw - 2011

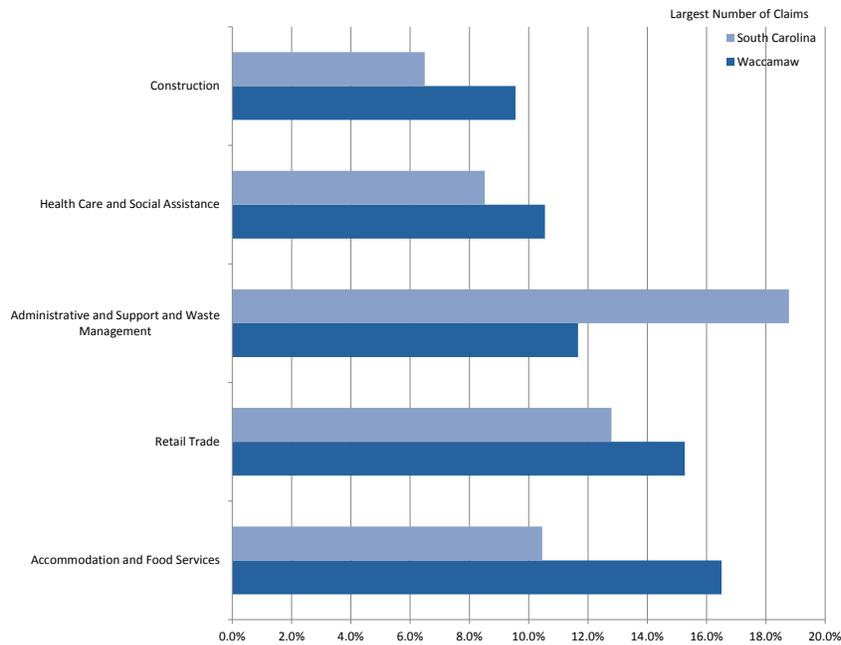
Majors	
Registered Nursing/Registered Nurse	355
Liberal Arts and Sciences/Liberal Studies	271
Management	151
Licensed Practical/Vocational Nurse Training	128
Marketing/Marketing Management, General	103
Speech Communication and Rhetoric	102
Marine Biology and Biological Oceanography	95
Psychology, General	85
Accounting	78
Business/Commerce, General	77
Biology/Biological Sciences, General	70
Child Care Provider/Assistant	70
Child Care and Support Services Management	68
Public Health Education and Promotion	64
Early Childhood Education and Teaching	63
History, General	59
Sport and Fitness Administration/Management	58
Cosmetology/Cosmetologist, General	56
Political Science and Government, General	56
Elementary Education and Teaching	54

Source: SC Commission on Higher Education, http://www.che.sc.gov/New_Web/Data&Pubs.htm

CHARACTERISTICS OF UI CLAIMS BY OCCUPATION

Another source of supply for the workforce is people who are receiving unemployment compensation. In the Waccamaw area, the highest number of claims is filed in the Accommodation and Food Services industry followed by the Retail Trade group. These two sectors include hotels, motels, recreational vehicle parks, restaurants, drinking places as well as motor vehicle and parts dealers, furniture and appliance stores, and building materials and garden supply dealers. These industries highlight the tourist and recreational base of the economy of Waccamaw and its support.

Figure 21: Characteristics of UI Claims by Occupation - April 2013



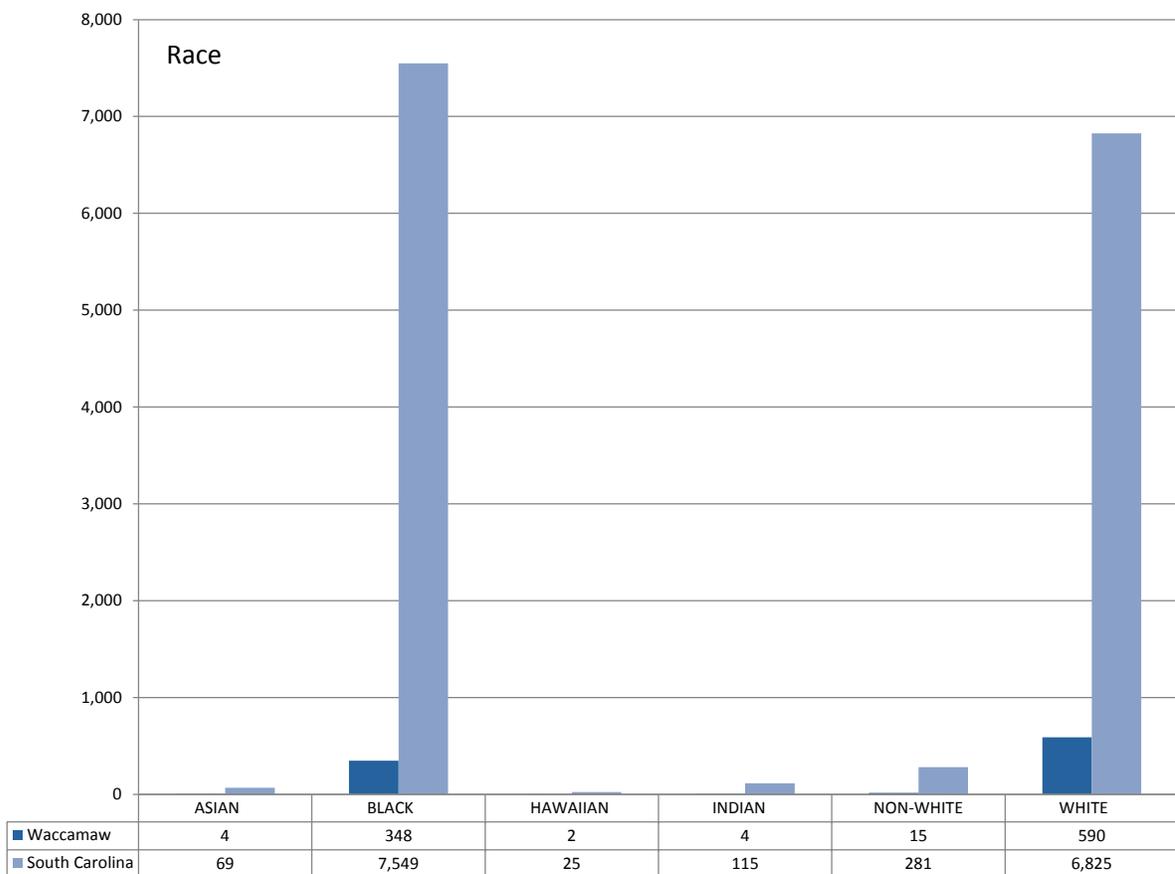
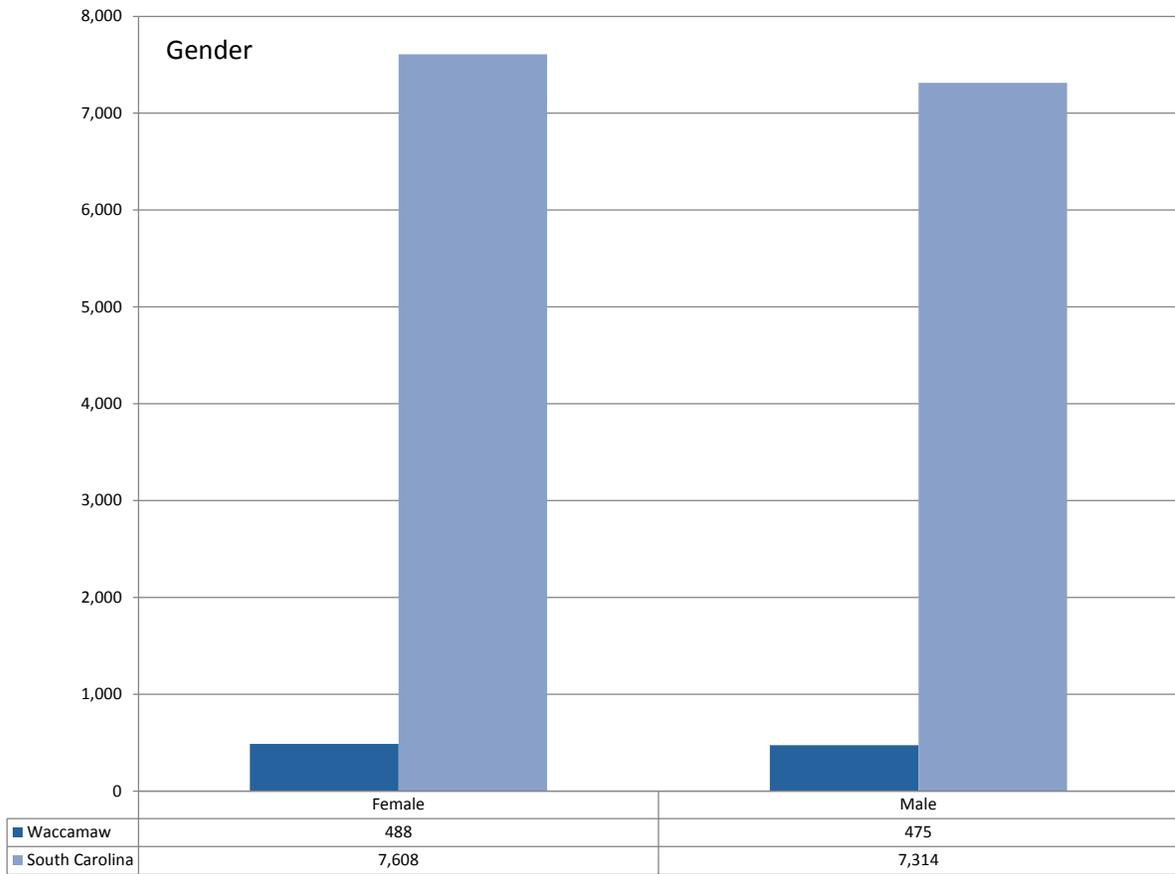
Occupation	Waccamaw	South Carolina
Accommodation and Food Services	133	1,321
Retail Trade	123	1,616
Administrative and Support and Waste Management	94	2,373
Health Care and Social Assistance	85	1,076
Construction	77	820
Manufacturing	55	2,267
Professional, Scientific, and Technical Services	38	698
Wholesale Trade	33	445
Real Estate and Rental and Leasing	32	213
Finance and Insurance	27	300
Arts, Entertainment, and Recreation	27	94
Other Services (except Public Administration)	18	292
Information	14	122
Transportation and Warehousing	12	414
Educational Services	12	222
Public Administration	11	206
Agriculture, Forestry, Fishing and Hunting	10	98
Utilities	3	22
Management of Companies and Enterprises	2	35

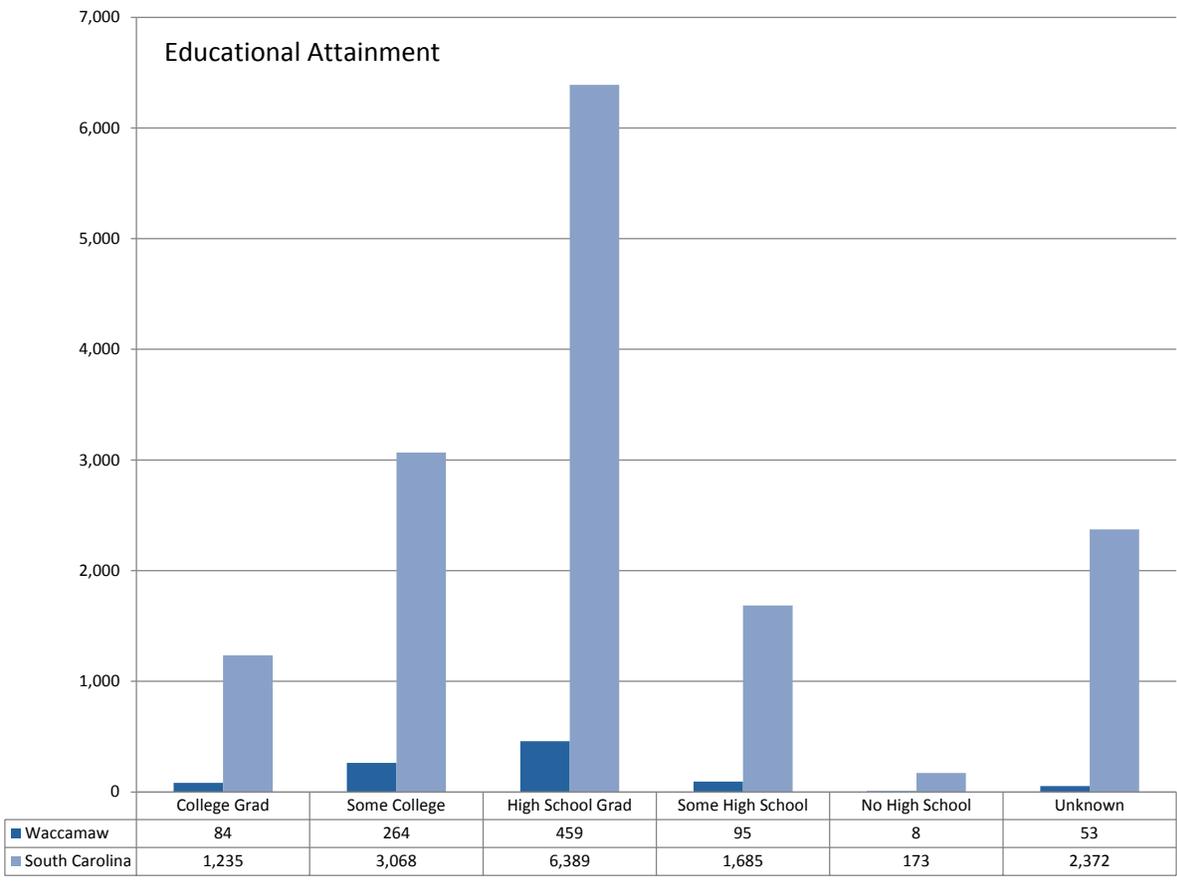
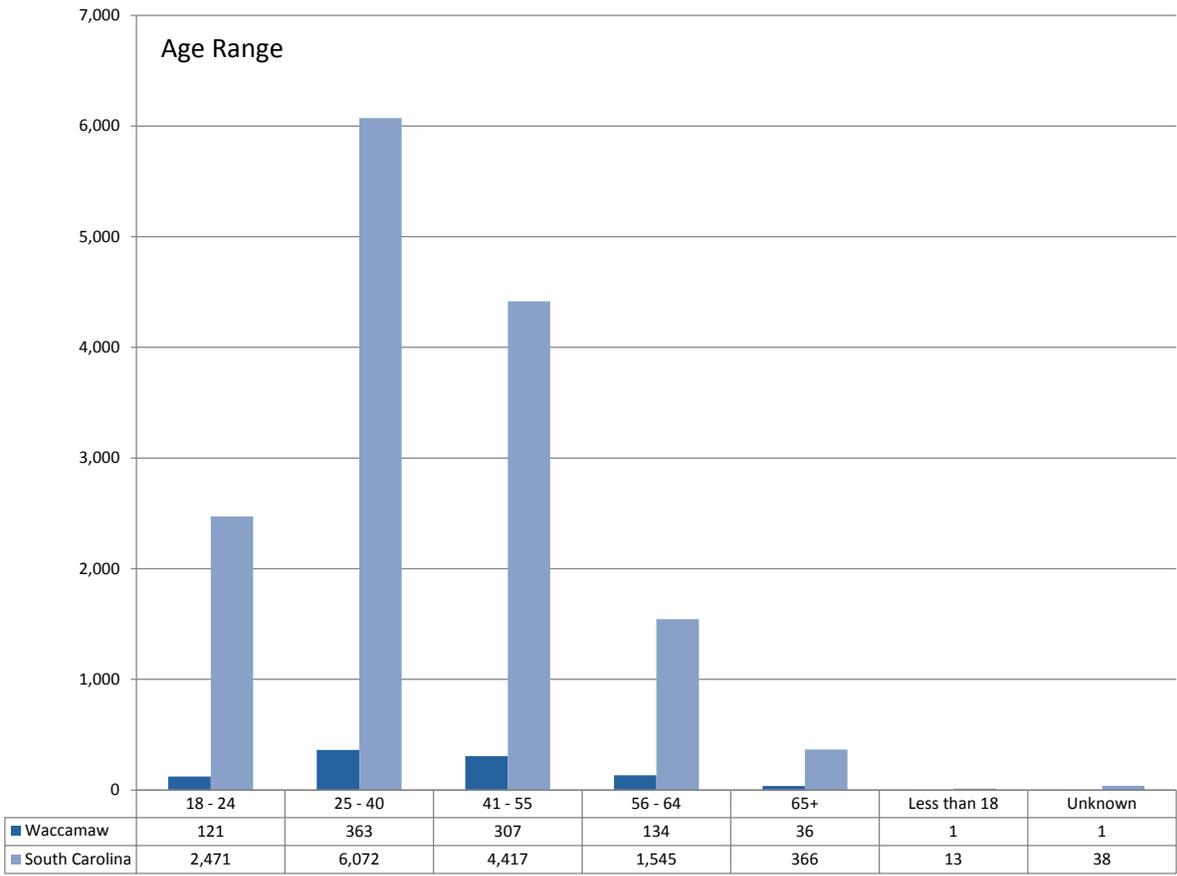
Source: SCDEW

UNEMPLOYMENT INSURANCE CLAIMANT CHARACTERISTICS

The people in this area who were receiving unemployment insurance benefits in April 2013 were typically female, white, 25-40 years old, and were high school graduates or earned a GED.

Figure 22: UI Claimant Characteristics - April 2013





Source: SCDEW

DEMAND: WHAT DO WE NEED?

Workforce demand shows what is needed in an area to support current and future employers. This section examines current (real-time) demand through online job advertisements, industry and occupational projections to 2018, educational requirements for future jobs, and the skills needed for those occupations.

Online job advertisements give a snapshot of what positions need to be filled in an area. The data is from the Conference Board Help Wanted OnLine® Data Series (HWOL) which measures the number of new and reposted job ads from over 16,000 Internet job boards. In April 2013, the largest occupational group with job ads in Waccamaw was Sales and Related Occupations followed by Healthcare Practitioners and Technical Occupations.

ONLINE JOB ADVERTISEMENTS

Figure 23: Waccamaw HWOL - April 2013 by Major Group

Occupation	# of Job Ads
Sales and Related Occupations	1028
Healthcare Practitioners and Technical Occupations	791
Food Preparation and Serving Related Occupations	766
Miscellaneous	642
Office and Administrative Support Occupations	621
Building and Grounds Cleaning and Maintenance Occupations	376
Transportation and Material Moving Occupations	368
Installation, Maintenance, and Repair Occupations	316
Management Occupations	257
Construction and Extraction Occupations	247
Personal Care and Service Occupations	239
Healthcare Support Occupations	173
Business and Financial Operations Occupations	104
Education, Training, and Library Occupations	100
Arts, Design, Entertainment, Sports, and Media Occupations	98
Protective Service Occupations	77
Production Occupations	72
Computer and Mathematical Occupations	63
Community and Social Services Occupations	46
Architecture and Engineering Occupations	24
Legal Occupations	22
Life, Physical, and Social Science Occupations	8
Farming, Fishing, and Forestry Occupations	7
Military Specific Occupations	1

Note: A job advertisement may include multiple openings.

Source: The Conference Board Help Wanted OnLine® Data Series (HWOL)

INDUSTRY PROJECTIONS

The Accommodation and Food Services industry is projected to have the largest increase in employment from 2008 to 2018, growing by 4,388 jobs or 439 jobs/year. The Retail Trade category reports the next largest growth with a projected 409 openings/year followed by the Health Care and Social Assistance sector.

Figure 24: Industry Projections - 2008-2018

Industry	Estimate Employment (2008)	Projected Employment (2018)	Change	Percent Change	Annual Percent Change
Total Employment, All Jobs	167,109	189,599	22,490	13.46	1.27
Accommodation and Food Services	31,772	36,160	4,388	13.81	1.30
Retail Trade	24,989	29,082	4,093	16.38	1.53
Health Care and Social Assistance	13,052	15,890	2,838	21.74	1.99
Construction	11,045	12,834	1,789	16.20	1.51
Educational Services	10,145	11,847	1,702	16.78	1.56
Administrative and Support and Waste Management and Remediat	7,619	8,984	1,365	17.92	1.66
Government	8,839	10,050	1,211	13.70	1.29
Professional, Scientific, and Technical Services	4,138	5,173	1,035	25.01	2.26
Arts, Entertainment, and Recreation	6,731	7,684	953	14.16	1.33
Other Services (Except Government)	5,755	6,494	739	12.84	1.22
Real Estate and Rental and Leasing	5,669	6,372	703	12.40	1.18
Wholesale Trade	3,183	3,564	381	11.97	1.14
Finance and Insurance	3,874	4,113	239	6.17	0.60
Management of Companies and Enterprises	756	919	163	21.56	1.97
Information	1,973	2,082	109	5.52	0.54
Transportation and Warehousing	1,789	1,887	98	5.48	0.53
Utilities	501	512	11	2.20	0.22
Mining	112	102	-10	-8.93	-0.93
Manufacturing	8,761	8,601	-160	-1.83	-0.18
Agriculture, Forestry, Fishing and Hunting	2,601	2,157	-444	-17.07	-1.85

Source: BLS, SCDEW, QCEW, WI

OCCUPATIONAL PROJECTIONS

Many of the occupations that are projected to have numerous openings between 2008 and 2018 in this area support a growing economy. The Hotel, Motel, and Resort Desk Clerks position is the leading projected growing occupation followed by Personal and Home Care Aides and Heating, Air Conditioning, and Refrigeration Mechanics.

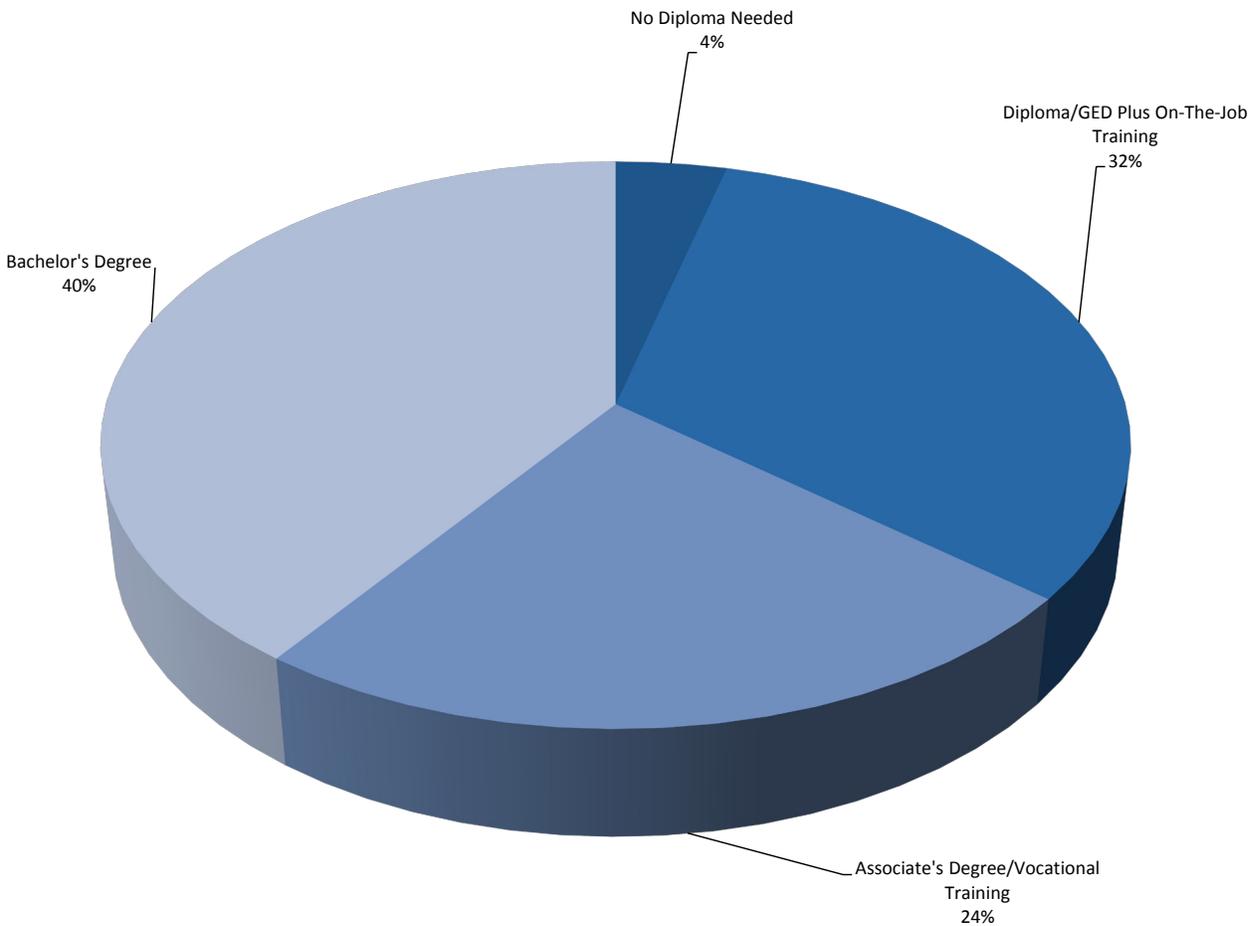
Figure 25: Growing Occupations - 2008-2018

Occupation	Estimated Employment (2008)	Projected Employment (2018)
Hotel, Motel, and Resort Desk Clerks	1,375	1,745
Accountants and Auditors	1,233	1,552
Personal and Home Care Aides	709	1,019
Heating, Air Conditioning, and Refrigeration Mecha	618	836
Pharmacy Technicians	408	586
Helpers--Electricians	406	516
Coaches and Scouts	267	346
Public Relations Specialists	256	325
Management Analysts	187	250
Compliance Officers, Except Agriculture, Construct	172	229
Self-Enrichment Education Teachers	155	216
Surgical Technologists	160	210
Social and Human Service Assistants	161	207
Instructional Coordinators	147	193
Fitness Trainers and Aerobics Instructors	149	191
Police, Fire, and Ambulance Dispatchers	150	190
Environmental Engineers	51	70
Captains, Mates, and Pilots of Water Vessels	47	61
Cardiovascular Technologists and Technicians	44	56
Veterinary Technologists and Technicians	42	55

Source: BLS, SCDEW, OES, WI

Of the top 50 projected growing occupations by percent change, 16 require a high school diploma or GED, two require less than a high school diploma or GED, 20 require a bachelor's degree or higher, and 12 need an associate's degree or require some kind of postsecondary vocational certification. Both of the two requiring less than a high school diploma or GED do require short-term on-the-job training (OJT), which is defined by the US Department of Labor as less than one month.

Figure 26: Education for Top 50 Projected Occupations



Source: BLS, SCDEW, OES, WI

It is just as important to know which occupations are declining in the area. Declines are often due to technological advances (i.e. computers or robots replacing humans), so many of the declining occupations are projected to be manual labor jobs, as shown in Figure 27.

Figure 27: Top 20 Projected Declining Occupations in Waccamaw - 2008-2018

Occupation
Aircraft Mechanics and Service Technicians
Computer Operators
Cutting, Punching, and Press Machine Setters
Farmworkers & Laborers, Crop, Nursery & Greenhouse
File Clerks
Helpers--Production Workers
Human Resources Assistants, Except Payroll
Machine Feeders and Offbearers
Mail Clerks and Mail Machine Operators
Meter Readers, Utilities
Order Clerks
Packers and Packagers, Hand
Postal Service Clerks
Postmasters and Mail Superintendents
Pressers, Textile, Garment, and Related Materials
Reporters and Correspondents
Sewing Machine Operators
Telemarketers
Textile Cutting Machine Setters, Operators, Tender
Weighers, Measurers, Checkers, and Samplers

Source: BLS, SCDEW, OES, WI

SKILLS OF PROJECTED OCCUPATIONS

Using the top 50 projected occupations, the skill levels needed for the future workforce based on the definitions given earlier in this report can be categorized.

Figure 28: Skill Levels

Low	7
Middle	23
High	20

Source: BLS, SCDEW, OES, WI

Low-skilled jobs often have commensurate (i.e. low) pay and do not require much education, experience, or OJT. Does the supply of workers have the right skills for the jobs in the future?

WORKFORCE CHALLENGES

The current economic situation in Waccamaw, the supply of workers, and the characteristics of workers who will be in demand has been reviewed. What can be gleaned from these findings? Are there gaps between supply and demand?

Supply Findings

Although the population should grow to 2030, a smaller-than-the-state share of 20-39 year olds in their prime working age, Waccamaw looks to have a challenge in having a proper age mix of workers given the tourist economy. In-migration from other states/countries adds a few residents at the top end of the educational spectrum. The area has a lower percent of residents aged 25 and older with at least a bachelor's degree than the state does as a whole, but has an above average percent of people with a high school diploma, some college, or an associate's degree.

Many high school students selected the Arts, Audio/Video/Technology, and Communications career cluster. The next most popular career cluster was STEM in keeping with state trends.

Demand Findings

Employer demand was consistent between online advertisements (current) and 2018 projected occupations (long-term needs) in general. Both had the need for workers in Marketing, Sales, and Service; Hospitality and Tourism; and Business, Management, and Administration. Health Science was a short-term need. Almost all of the top projected occupations require at least a high school diploma or GED.

Figure 29: Comparison of Supply and Demand

	Demand		Supply	
	Top online ads	Projected Occupations	Degrees Earned	Career Clusters Selected
Agriculture, Food and Natural Resource	2.3	3.6	1.0	3.2
Architecture and Construction	6.6	7.1	1.8	3.2
Arts, Audio/Video Technology and Communications	2.3	0.8	2.5	18.0
Business, Management and Administration	10.8	12.3	12.6	8.2
Education and Training	2.0	4.4	22.4	5.3
Finance	4.9	1.7	1.2	0.6
Government and Public Administration	0.1	0.3	1.8	2.9
Health Science	16.6	6.0	28.2	16.6
Hospitality and Tourism	11.0	19.7	1.3	2.8
Human Service	8.5	8.8	8.6	6.7
Information Technology	1.8	0.6	2.6	2.5
Law, Public Safety, Corrections and Security	1.8	3.8	2.3	8.1
Manufacturing	1.9	2.9	1.0	1.2
Marketing, Sales and Service	20.3	23.5	3.3	0.5
Science, Technology, Engineering and Mathematics	0.9	0.6	9.2	17.0
Transportation, Distribution, and Logistics	8.4	3.9	0.3	3.2

Source: BLS, SCDEW, WI, SC Department of Education, OES, HWOL

A few observations about the comparison that could be considered challenges to the workforce pipeline include:

- There are many post-secondary degrees being earned by area graduates in Health Science; Education and Training; and Science, Technology, Engineering and Mathematics that exceed short-term demand in the area.
- There is an overabundance of Arts, Audio/Video Technology and Communication; Health Science; Science, Technology, Engineering, and Math; and Law, Public Safety, Corrections and Security clusters selected by students that will far outpace the area's long-term demand.
- The short- and long-term demand for workers in Marketing, Sales and Service and Hospitality and Tourism is not projected to be met by today's area graduates or students.
- There is a short-term shortage of graduates in Architecture and Construction and Transportation, Distribution, and Logistics to meet demand.

There is always a demand for employees with soft skills. It is said that hard skills (training, degrees, or certification) get you hired, but soft skills get you fired. Many of our residents need to learn or get a refresher in soft skills in order to KEEP their jobs. Employers see the need.

Top 10 Soft Skills Found in Online Ads for South Carolina (April 2013)

1. Oral and written communication skills
2. Customer Service Oriented
3. Problem solving
4. Detail oriented
5. Microsoft Office
6. Self-starting / Self-motivated
7. Organizational skills
8. Troubleshooting
9. Work independently
10. Sales experience

Source: *The Conference Board Help Wanted OnLine*® Data Series (HWOL)

CONCLUSION

The Waccamaw area overall encompasses an economy dependent on tourism and retail trade. The population continues to increase, and the education level for the population is higher than the state as a whole at the midrange with higher percentages of residents with high school diplomas to associate's degrees. The workforce (current and potential) does face challenges in having the proper mix of employer demand being met by trained applicants. The majority of employers are advertising for jobs in health care; hospitality and tourism; business management and administration; and marketing and sales. However, some supply flows could be fine-tuned to be more in line with demand.

The data shows that in the area:

- There is an undersupply of today's students choosing the fields of Business, Management and Administration; Hospitality and Tourism; and Marketing, Sales and Service to meet Waccamaw's future demand.
- There is an oversupply of today's students choosing the areas of Arts, Audio/Video Technology and Communication; Law, Public Safety, Corrections and Security; Science, Technology, Engineering and Mathematics; and Health Science that will far outpace the area's long-term demand.
- Comprehensive soft skills training is needed for all students and job seekers (high school, post-secondary, adult, new and returning entrants to the labor force, and incumbent workers) so that they can not only get hired but retain their positions and thus reduce employee turnover.

Getting education in line with the demands of employers will help Waccamaw meet the challenges it faces.

WORKLINK LWIA WORKFORCE REPORT 2012



The *Worklink Workforce Report* is published by the Labor Market Information (LMI) Department of the South Carolina Department of Employment and Workforce. The information and analyses provided in this publication are based on data collected from sources throughout South Carolina and the United States.

About SC DEW and LMI:

The Labor Market Information Department compiles and publishes employment statistics, job forecasts, wage data, demographics, and other labor market information to help public and private organizations, researchers, and others better understand today's complex workforce.

The LMI Department produced this report under the leadership of:

Executive Director - Cheryl Stanton
Interim Deputy Assistant Executive Director - Kerry Paul
Labor Market Information Director - Brenda Lisbon

South Carolina Department of Employment and Workforce
1550 Gadsden Street
Columbia, South Carolina 29201
(803) 737-2660
www.dew.sc.gov
www.scworkforceinfo.com



TABLE OF CONTENTS

EXECUTIVE SUMMARY	VI
INTRODUCTION	VII
ECONOMIC DISCUSSION: A CURRENT PICTURE OF THE WORKFORCE	1
EMPLOYMENT BY INDUSTRY	1
LOCATION QUOTIENT	1
AVERAGE ANNUAL WAGE BY INDUSTRY	2
OCCUPATIONAL EMPLOYMENT	3
SKILLS DATA	4
EMPLOYMENT AND UNEMPLOYMENT	6
NEW STARTUP FIRMS	8
EMPLOYERS BY SIZE OF ESTABLISHMENT	9
SUPPLY: WHAT'S OUT THERE?	10
POPULATION BY AGE	10
POPULATION CHANGE AND MIGRATION	11
COMMUTING PATTERNS	12
EDUCATIONAL ATTAINMENT	12
CAREER CLUSTERS SELECTED BY HIGH SCHOOL STUDENTS	13
DEGREES AWARDED	15
CHARACTERISTICS OF UI CLAIMS BY OCCUPATION	16
UNEMPLOYMENT INSURANCE CLAIMANT CHARACTERISTICS	17
DEMAND: WHAT DO WE NEED?	20
ONLINE JOB ADVERTISEMENTS	20
INDUSTRY PROJECTIONS	20
OCCUPATIONAL PROJECTIONS	21
SKILLS OF PROJECTED OCCUPATIONS	24
WORKFORCE CHALLENGES	25
CONCLUSION	27

TABLE OF FIGURES

FIGURE 1: WORKLINK LWIA EMPLOYMENT BY INDUSTRY - 3RD QUARTER 2012	1
FIGURE 2: NOTABLE WORKLINK LWIA LOCATION QUOTIENTS - 2011	2
FIGURE 3: ANNUAL AVERAGE WAGE BY INDUSTRY - 3RD QUARTER 2012.....	3
FIGURE 4: TOP 20 OCCUPATIONS WITH WAGES - 2012.....	4
FIGURE 5: TOP OCCUPATIONS BY SKILL CLASSIFICATION - WORKLINK 2012	5
FIGURE 6: EMPLOYMENT - 2002-2012.....	6
FIGURE 7: UNEMPLOYMENT - 2002-2012	7
FIGURE 8: ANNUAL UNEMPLOYMENT - 2002-2012	8
FIGURE 9: MONTHLY UNEMPLOYMENT RATE - MARCH 2011-APRIL 2013.....	8
FIGURE 10: NEW STARTUP FIRMS - 2007-2012.....	9
FIGURE 11: EMPLOYERS BY SIZE OF ESTABLISHMENT - 3RD QUARTER 2012.....	9
FIGURE 12: POPULATION BY AGE	10
FIGURE 13: POPULATION PROJECTIONS TO 2030.....	11
FIGURE 14: POPULATION MIGRATION - 2011 - 5-YEAR ESTIMATE.....	11
FIGURE 15: COMMUTING PATTERNS - 2010.....	12
FIGURE 16: EDUCATIONAL ATTAINMENT - WORKLINK AND SOUTH CAROLINA 2011	12
FIGURE 17: EDUCATIONAL ATTAINMENT - WORKLINK 2011.....	13
FIGURE 18: PERCENT OF STUDENTS DECLARING A CAREER CLUSTERS IN WORKLINK AND SC - 2012.....	14
FIGURE 19: CAREER CLUSTERS - 2012.....	15
FIGURE 20: TOP 20 MAJORS IN WORKLINK - 2011.....	16
FIGURE 21: CHARACTERISTICS OF UI CLAIMS BY OCCUPATION - APRIL 2013.....	17
FIGURE 22: UI CLAIMANT CHARACTERISTICS - APRIL 2013.....	18
FIGURE 23: WORKLINK HWOL - APRIL 2013 BY MAJOR GROUP.....	20
FIGURE 24: INDUSTRY PROJECTIONS - 2008-2018	21
FIGURE 25: GROWING OCCUPATIONS - 2008-2018.....	22
FIGURE 26: EDUCATION FOR TOP 50 PROJECTED OCCUPATIONS	23
FIGURE 27: TOP 20 PROJECTED DECLINING OCCUPATIONS IN WORKLINK - 2008-2018	24
FIGURE 28: SKILL LEVELS.....	24
FIGURE 29: COMPARISON OF SUPPLY AND DEMAND.....	25

EXECUTIVE SUMMARY

The employment leaders for WorkLink Local Workforce Investment Area (LWIA) are Manufacturing, Retail Trade, and Healthcare and Social Assistance. Employment growth is anticipated by 2018 in several industries, especially Healthcare and Social Assistance, Administrative and Support and Waste Management and Remediation Services. This latter sector includes office administrative services; facilities support services; employment services; services to buildings and dwellings; and waste collection, treatment, and disposal services. The highest wages are paid by the Utilities and the Management of Companies and Enterprises industries.

The LWIA's population grew by 11 percent from 2000 to 2010 and has more residents age 60 to 74 and fewer residents aged 25 to 39 than the state's average.

Employment is rising and unemployment is declining. Though the LWIA has a historically higher unemployment rate than the state, it fell below state's rate during and after the recession. Employment is concentrated in Anderson, and over 25,000 more people leave the LWIA for work than enter it every day. Administrative and Support and Waste Management and Remediation Services is the largest industry represented in unemployment claims.

WorkLink has a higher proportion of residents with a high school education than the state does as a whole. However, 19 percent of residents do not have a high school diploma, and a lower percent of residents have postsecondary training than does the state overall. For projected growing jobs, 5 percent require no diploma, 10 percent require a diploma and training, 7 percent require an associate's degree or vocational training, and 28 percent require a bachelor's degree or more.

WorkLink LWIA businesses desire a trained workforce with the current focus being on manufacturing-specific certifications, like Computer Numerical Control machining and welding. The advanced Manufacturing industry is having difficulty meeting its employee needs with WorkLink's contemporary workforce. Although many manufacturing firms are willing to train their workers, there exists a perception gap between current and former manufacturing techniques, opportunities, and environments.

WorkLink LWIA has several factors working in its favor. It has a growing population and several educational institutions available to strengthen the workforce. The Manufacturing sector is a major employment force and has a very high job multiplier. Workers are becoming smarter and are gaining skills. Unemployment rates are lower than the state's average. The future looks more sunny than cloudy for the LWIA.

The patterns and trends described in this report offer cause for both optimism and concern. WorkLink LWIA has an exciting future ahead of it, and can lead the way in delivering the skilled talent and economic opportunities that businesses and workers in the area deserve.

INTRODUCTION

The WorkLink Local Workforce Investment Area is composed of Anderson, Oconee, and Pickens counties and is located in the north-western part of the state. The Blue Ridge Mountains and South Carolina's highest point at Sassafras Mountain are located in the LWIA, which borders North Carolina and Georgia. Several man-made lakes provide watersports and hydroelectric power; the Oconee Nuclear Station is also located in the LWIA. The historical economy included the Agriculture and Hospitality related industries, while the modern economy is dominated by Manufacturing and Retail trade.

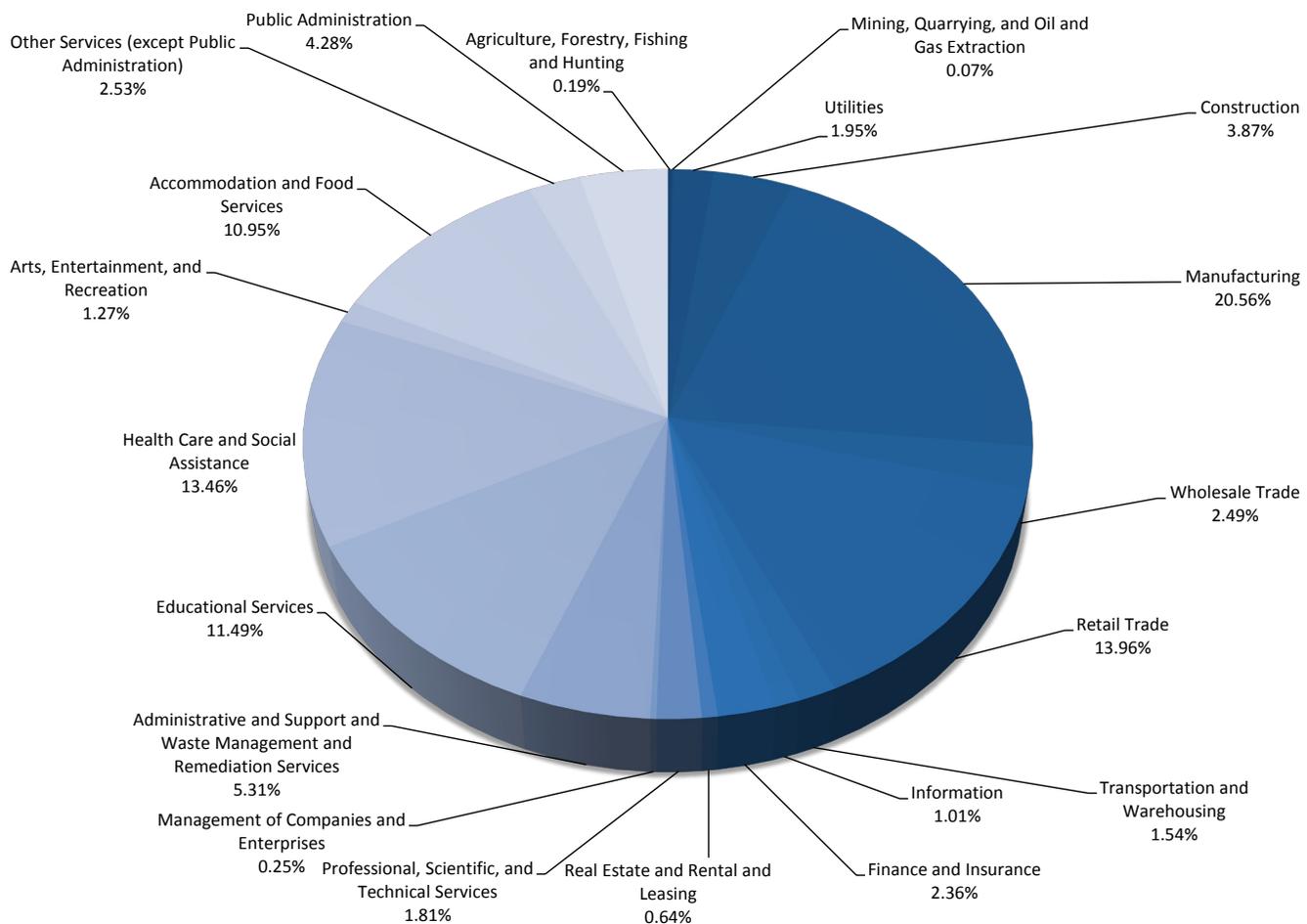
The economic changes this year in the WorkLink LWIA demonstrate the shifting needs of employers and employees. Cultivating an understanding of the workforce allows all three counties to respond to anticipated future needs. Analyses help to identify the gap between what the workforce has in the way of talent and skills (supply) and what it may need in the future (demand).

The purpose of the WorkLink LWIA Workforce Report is to present a comprehensive view of the status of WorkLink counties' economy and workforce. The report includes an analysis of WorkLink LWIA's workforce, industries, economic climate, and factors that will affect all three. Forecasts will be made for the workforce, industries, and the economy.

ECONOMIC DISCUSSION: A CURRENT PICTURE OF THE WORKFORCE

EMPLOYMENT BY INDUSTRY

Figure 1: WorkLink LWIA Employment By Industry - 3rd Quarter 2012



Source: Bureau of Labor Statistics (BLS), SC Department of Employment & Workforce (SCDEW), Quarterly Census of Employment and Wages (QCEW)

Manufacturing and Retail Trade are the top two industries employing workers in the WorkLink LWIA. Industries like Educational Services and Healthcare and Social Assistance are healthy and flourishing, while others like Construction are still recovering from the recession. The 2010 per capita income for a WorkLink LWIA resident was \$29,955 which is an increase of 26.2 percent from 2000.¹ Economic growth has taken place in the past decade to enhance the LWIA's workers, although the area is still recovering from a tough business cycle.

LOCATION QUOTIENT

A location quotient (LQ) is a useful tool for determining the concentration of workers in a given area. Location quotients compare the regional share of employment in a particular industry to the national share of employment in the same industry. The resulting quotient reveals the degree of regional specialization or concentration in an industry and provides insight into what makes the area unique in comparison to the national average. An LQ of 1.0 means the concentration of jobs in that industry matches the nation's value. Location quotients higher than 1.0 indicate the level of specialization the area has in particular sectors. Lower quotients can indicate a possible area that could be expanded.

Figure 2: Notable WorkLink LWIA Location Quotients - 2011

Industry and Sectors	Location Quotient
<i>Anderson County</i>	
Textile Mills	32.1
Plastics and Rubber Products Manufacturing	5.9
Transportation Products Manufacturing	4.8
<i>Oconee County</i>	
Electrical Equipment and Appliance Manufacturing	19.8
Machinery Manufacturing	5.7
Forestry and Logging	4.9
<i>Pickens County</i>	
Textile Mills	37.5
Machinery Manufacturing	4.5
Computer and Electronic Products Manufacturing	2.8

Source: US Department of Labor, Bureau of Labor Statistics - http://data.bls.gov/location_quotient

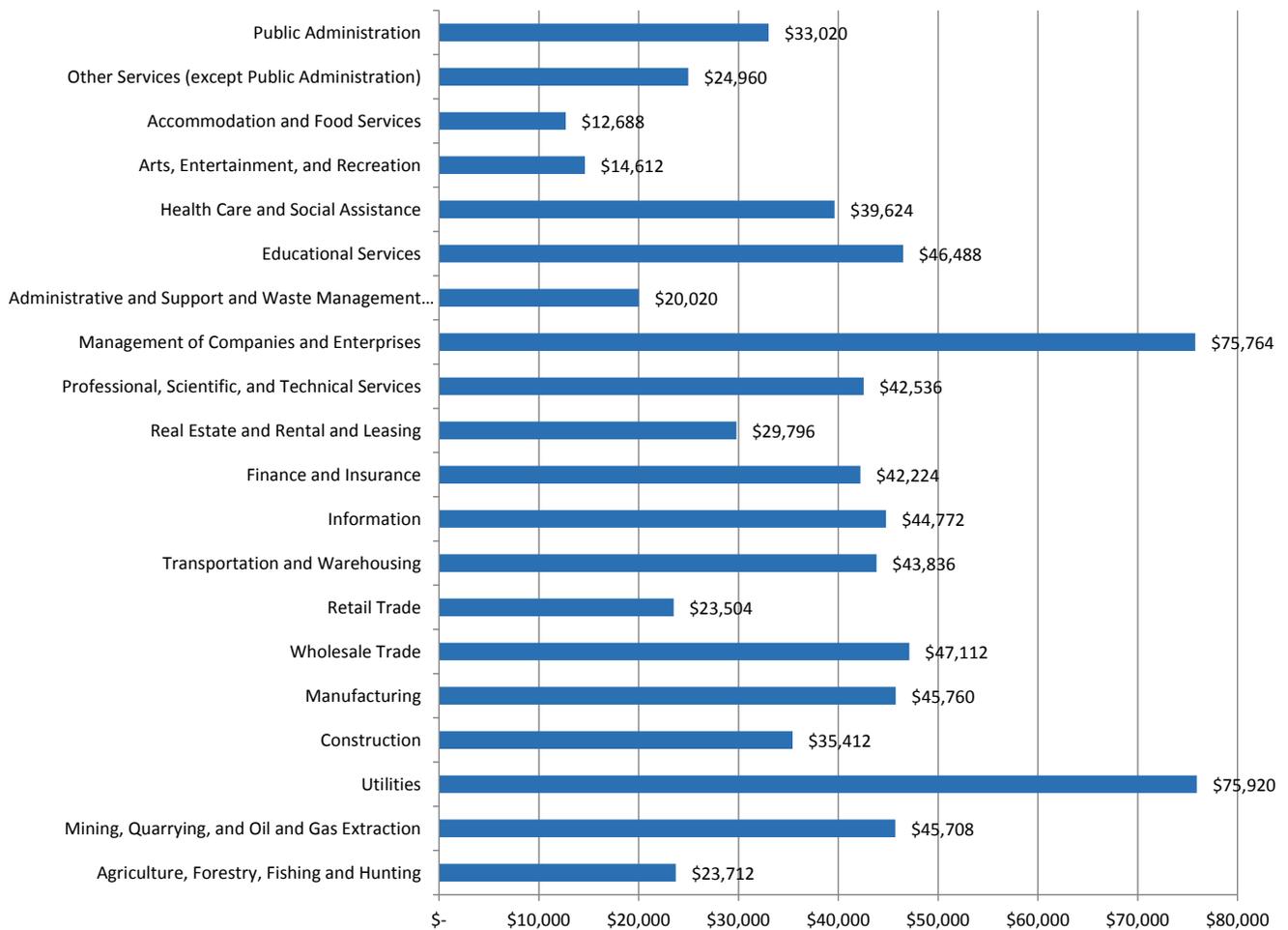
Textile Mills and Electrical Equipment and Appliance Manufacturing top the most concentrated industries in this area with LQs over 19. Textile Mill companies transform a basic fiber into a product like yarn or fabric and are a highly-focused sector in Anderson and Pickens counties. Other manufacturing sectors focused throughout the area include Plastics and Rubber Products; Computer and Electronic Products; and Machinery.

AVERAGE ANNUAL WAGE BY INDUSTRY

The annual wages for utility workers are usually among the highest for any LWIA industry. These workers have a wide range of education (high school diploma to PhD) and tend to stay in their jobs for a very long time, which increases the average wage as small raises accumulate over time. Wages for the management of companies are the second highest in the LWIA.

High wage industries like Information; Professional, Scientific, and Technical Services; and Education Services usually require at least a bachelor's degree. Having an education is an excellent way to enter a high-wage industry and have more options for employment.

Figure 3: Annual Average Wage by Industry - 3rd Quarter 2012



Source: BLS, SCDEW, QCEW

OCCUPATIONAL EMPLOYMENT

When examining the current occupational employment in the area, one can observe that some of the top 20 occupations are low-skill, low-pay jobs. These jobs, like Cashiers, Waiters and Waitresses, and Janitors, have high turnover. These are not necessarily the most robust jobs as far as wages, but they are jobs.

Figure 4 lists occupations, like Registered Nurses, Elementary School Teachers, and First-Line Supervisors, that pay a higher wage. Manufacturing, Retail Trade, and Healthcare comprise nearly half of the employment in the WorkLink LWIA, reflected in this list of top occupations: Team Assemblers; Laborers and Material Movers; Retail Salespersons; and Registered Nurses.

Figure 4: Top 20 Occupations with Wages - 2012

Occupational Title	Total Employment	Hourly Average Wage (\$)
All Occupations	57,610	17.39
Retail Salespersons	2,430	11.11
Cashiers	2,080	8.49
Combined Food Preparation and Serving Workers, Including Fast Food	1,910	8.40
Team Assemblers	1,550	12.50
Registered Nurses	1,300	27.42
Waiters and Waitresses	1,160	8.12
Office Clerks, General	1,040	12.14
Laborers and Freight, Stock, and Material Movers, Hand	990	12.01
Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	930	14.40
Elementary School Teachers, Except Special Education	880	20.40
Maintenance and Repair Workers, General	860	18.40
Customer Service Representatives	790	13.27
Heavy and Tractor-Trailer Truck Drivers	760	14.12
Stock Clerks and Order Fillers	710	10.66
Bookkeeping, Accounting, and Auditing Clerks	660	15.63
First-Line Supervisors of Retail Sales Workers	650	18.10
Textile Knitting and Weaving Machine Setters, Operators, and Tenders	640	14.21
Janitors and Cleaners, Except Maids and Housekeeping Cleaners	620	10.99
First-Line Supervisors of Office and Administrative Support Workers	620	22.21
Sales Representatives, Wholesale and Manufacturing, Except Technical and Scientific Products	610	22.71

Source: BLS, SCDEW, Occupational Employment Statistics (OES)

SKILLS DATA

Employers are beginning to see that a person’s skills, in addition to their education, may help in determining who to hire. Many times the degree is not as important as the skills gained through specialized training and/or experience. In order to be able to determine the current level of skills in the area, the top 50 current occupations by employment are presented, and assigned a low, middle, or high skill designation to that occupation. The definitions for those skills levels are:

- **LOW:** No high school or GED, or high school/GED with less than one year experience and no on-the-job-training (OJT), or short-term OJT
- **MIDDLE:** High school/GED with one year experience, or moderate OJT, or long-term OJT, or apprenticeship, or postsecondary vocational training, or some college, or Associate’s Degree, or less than a Bachelor’s Degree
- **HIGH:** Bachelor’s Degree or higher

In the WorkLink area, 22 of the top 50 jobs in 2012 are considered low-skill jobs. Twenty-four are middle skill, and four are high-skill occupations.

Figure 5: Top Occupations By Skill Classification - WorkLink 2012

Skillset: LOW
Billing and Posting Clerks
Cashiers
Combined Food Preparation and Serving Workers, Including Fast Food
Construction Laborers
Cooks, Institution and Cafeteria
Cooks, Restaurant
Customer Service Representatives
Food Preparation Workers
Helpers--Production Workers
Janitors and Cleaners, Except Maids and Housekeeping Cleaners
Laborers and Freight, Stock, and Material Movers, Hand
Landscaping and Groundskeeping Workers
Light Truck or Delivery Services Drivers
Office Clerks, General
Personal Care Aides
Receptionists and Information Clerks
Retail Salespersons
Secretaries and Administrative Assistants, Except Legal, Medical, and Executive
Shipping, Receiving, and Traffic Clerks
Stock Clerks and Order Fillers
Teacher Assistants
Waiters and Waitresses
Skillset: MIDDLE
Bookkeeping, Accounting, and Auditing Clerks
Bus Drivers, School or Special Client
Emergency Medical Technicians and Paramedics
Extruding and Forming Machine Setters, Operators, and Tenders, Synthetic and Glass Fibers
First-Line Supervisors of Food Preparation and Serving Workers
First-Line Supervisors of Office and Administrative Support Workers
First-Line Supervisors of Production and Operating Workers
First-Line Supervisors of Retail Sales Workers
General and Operations Managers
Heavy and Tractor-Trailer Truck Drivers
Industrial Engineering Technicians
Industrial Machinery Mechanics
Inspectors, Testers, Sorters, Samplers, and Weighers
Machinists
Maintenance and Repair Workers, General
Medical Secretaries
Mixing and Blending Machine Setters, Operators, and Tenders
Nursing Assistants
Pharmacy Technicians
Police and Sheriff's Patrol Officers
Registered Nurses
Sales Representatives, Wholesale and Manufacturing, Except Technical and Scientific Products
Team Assemblers
Textile Knitting and Weaving Machine Setters, Operators, and Tenders
Skillset: HIGH
Accountants and Auditors
Elementary School Teachers, Except Special Education
Middle School Teachers, Except Special and Career/Technical Education
Secondary School Teachers, Except Special and Career/Technical Education

Source: BLS, SCDEW, OES, Workforce Intelligence (WI)

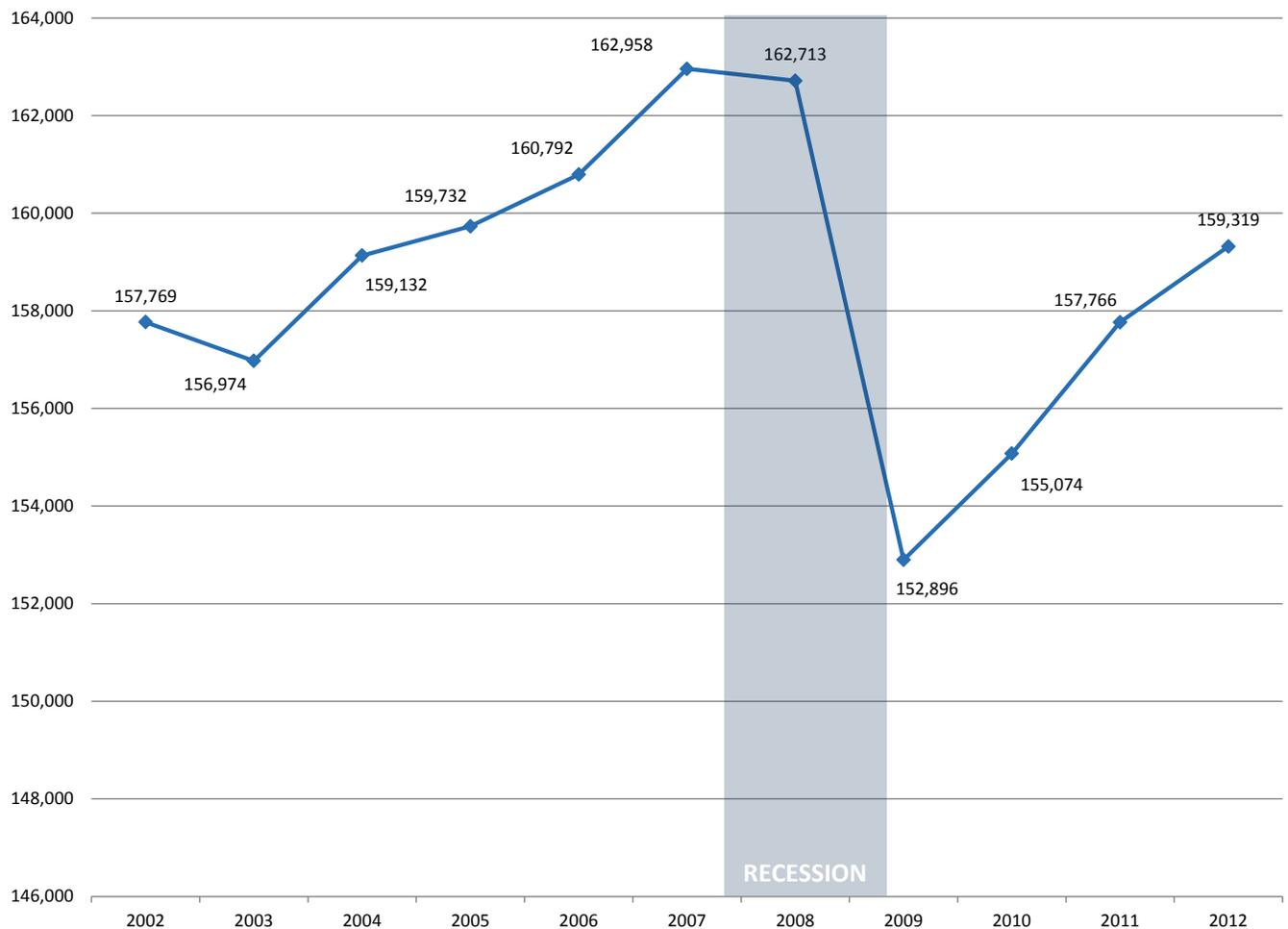
EMPLOYMENT AND UNEMPLOYMENT

A crucial indicator of the health of a workforce is its labor force levels. Labor force data count residents who are employed and unemployed. There are a few Federal definitions that will make discussion of the labor force a little easier to understand.

- Employed: Persons 16 years old or older who worked for pay any time during the week that includes the 12th of the month
- Unemployed: Persons 16 years old or older who are not working but want a job, and are able and willing to work
- Labor Force: Employed plus unemployed
- Unemployment Rate: Unemployment divided by labor force

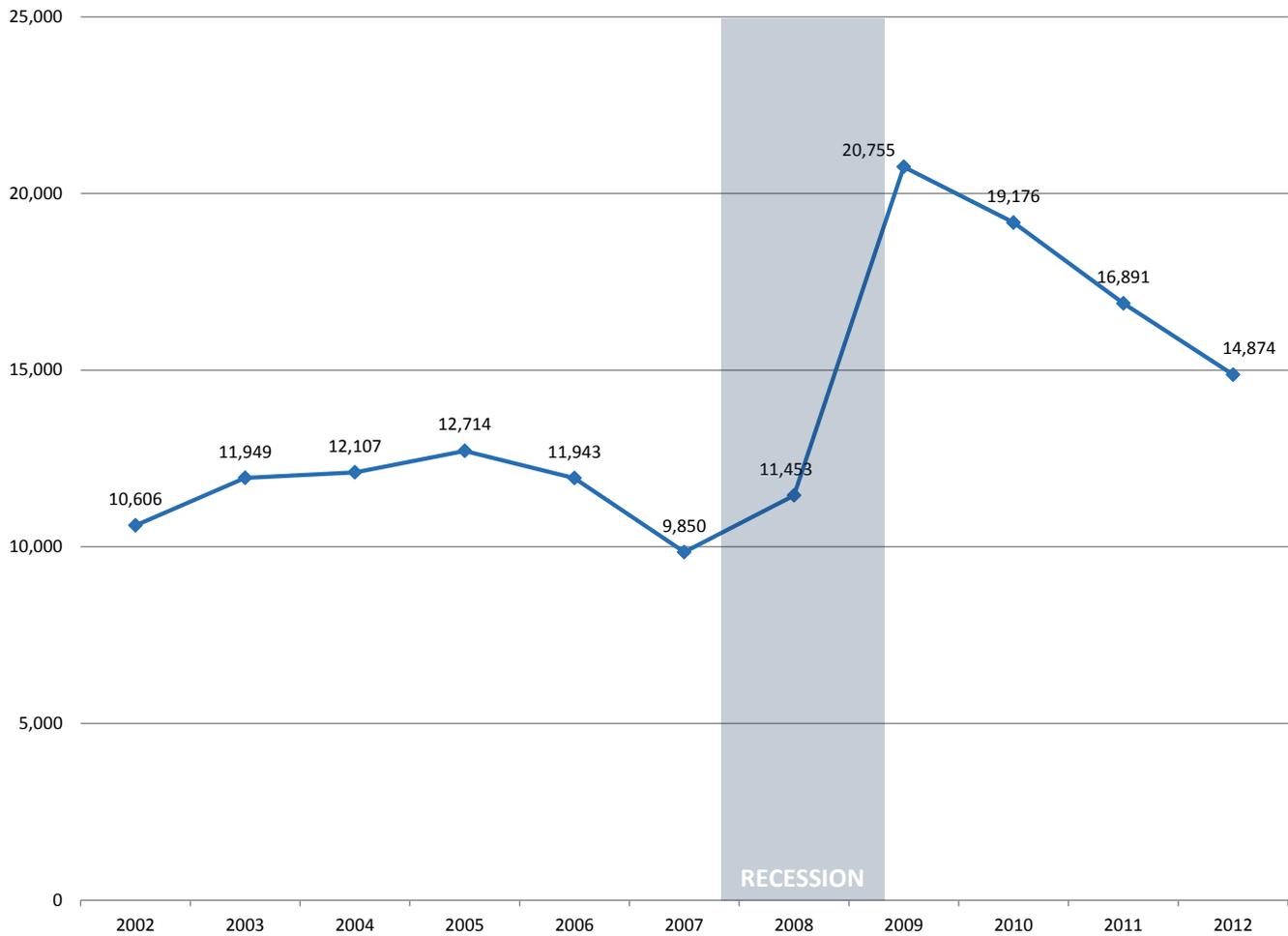
In Figure 6, the recession (officially from December 2007 through June 2009) had a great effect on the labor force. Employment dropped, and unemployment increased by 111 percent.

Figure 6: Employment - 2002-2012



Source: BLS, SCDEW, Local Area Unemployment Statistics (LAUS)

Figure 7: Unemployment - 2002-2012

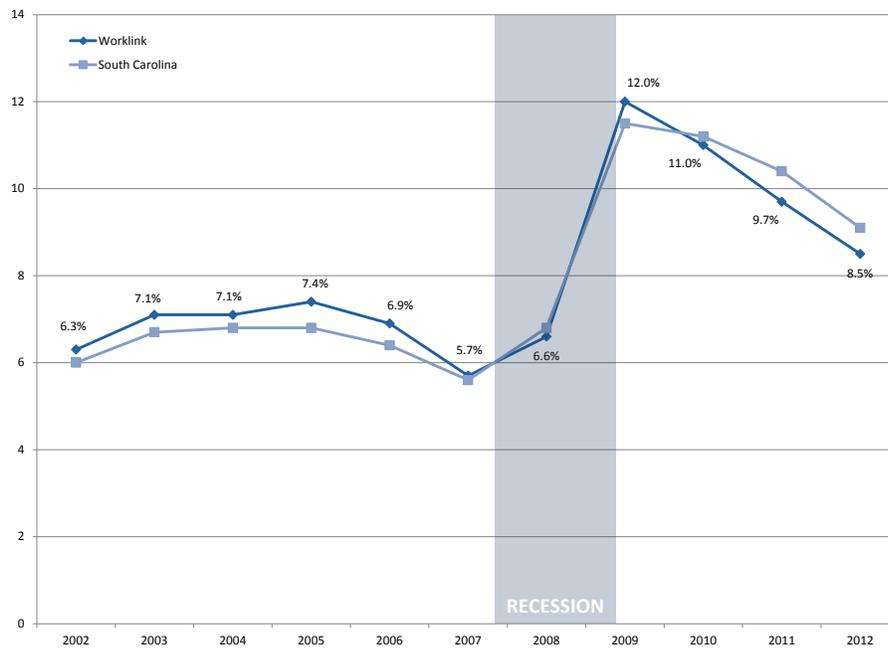


Source: BLS, SCDEW, LAUS

Tracking annual unemployment rates give a good snapshot of the state of an area’s workforce. Annual rates smooth out the usual ups and downs of a month-to-month rate (due to normal seasonal or cyclical changes) to give a more accurate picture.

Figure 8 shows the annual rates for the WorkLink LWIA area and South Carolina. From 2002 to 2007 WorkLink was consistently above the state’s rate but fell below it after the recession. During the recession, the WorkLink rate more than doubled from 5.7 percent in 2007 to 12.0 percent in 2009.

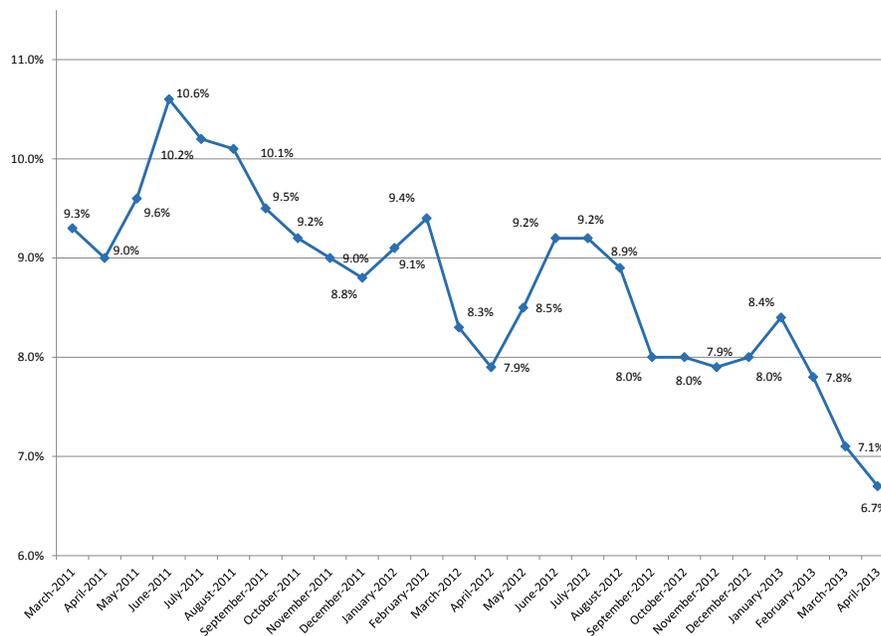
Figure 8: Annual Unemployment - 2002-2012



Source: BLS, SCDEW, LAUS

Figure 9 illustrates that the monthly unemployment rate has seen wide fluctuations since February 2011. The area seems to be steadily recovering from the recession.

Figure 9: Monthly Unemployment Rate - March 2011-April 2013



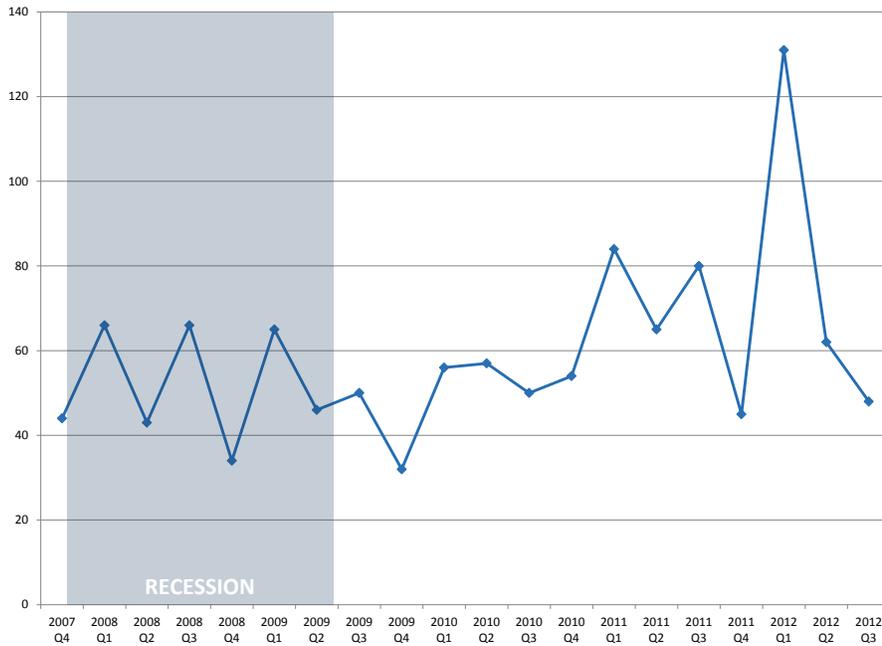
Source: BLS, SCDEW, LAUS

NEW STARTUP FIRMS

One way to see if an economy is improving is to examine data about startup firms. An increase in new companies might be an indicator of expansion in the area, whereas a drop in new firms shows a lack of confidence in the future. (Note: There is almost always a spike in startups in the first quar-

ter of the year.) Again, the recession had a major impact on normal business birth and death rates. Startups have been steady in the area with a large increase in early 2012.

Figure 10: New Startup Firms - 2007-2012



Source: BLS, SCDEW, QCEW

EMPLOYERS BY SIZE OF ESTABLISHMENT

By far, the largest category of business size in the area is small business. Small businesses (or establishments) are defined in South Carolina as companies employing 49 or fewer people. The WorkLink LWIA has 94 percent of establishments designated as small businesses, and South Carolina as a whole has 93 percent.

Small businesses may need more support and assistance than larger companies because they may not have a designated human resources department or person. They may rely on other resources, such as SC Works Centers, for help with hiring, training, or screening job candidates.

Figure 11: Employers by Size of Establishment - 3rd Quarter 2012

Employees	Worklink	South Carolina
0 to 4	3,728	63,766
5 to 9	1,274	19,667
10 to 19	854	13,316
20 to 49	590	9,881
50 to 99	216	3,907
100 to 249	112	2,433
250 to 499	38	757
500 to 999	12	328
1000 +	7	264

Source: BLS, SCDEW, QCEW

SUPPLY: WHAT'S OUT THERE?

A manufacturing assembly line needs to have resources and supplies on-hand so that the line does not have to stop. The same is true for the workforce. The supply of workers needs to be of the right quantity and quality to do the job. Is the supply of workers in line with what the companies in the WorkLink LWIA need? Seven streams of workforce supply provide an indication: population, commuting, education of the population, clusters of high school students, awards earned at higher education institutions, and characteristics of unemployment insurance claims and claimants.

POPULATION BY AGE

Age distribution in the area is similar to the state and the country with two exceptions. In the 25-39 age cohorts, WorkLink has a notably lower proportion of population, and in the 60-74 age cohorts, the LWIA has a markedly higher proportion of population.

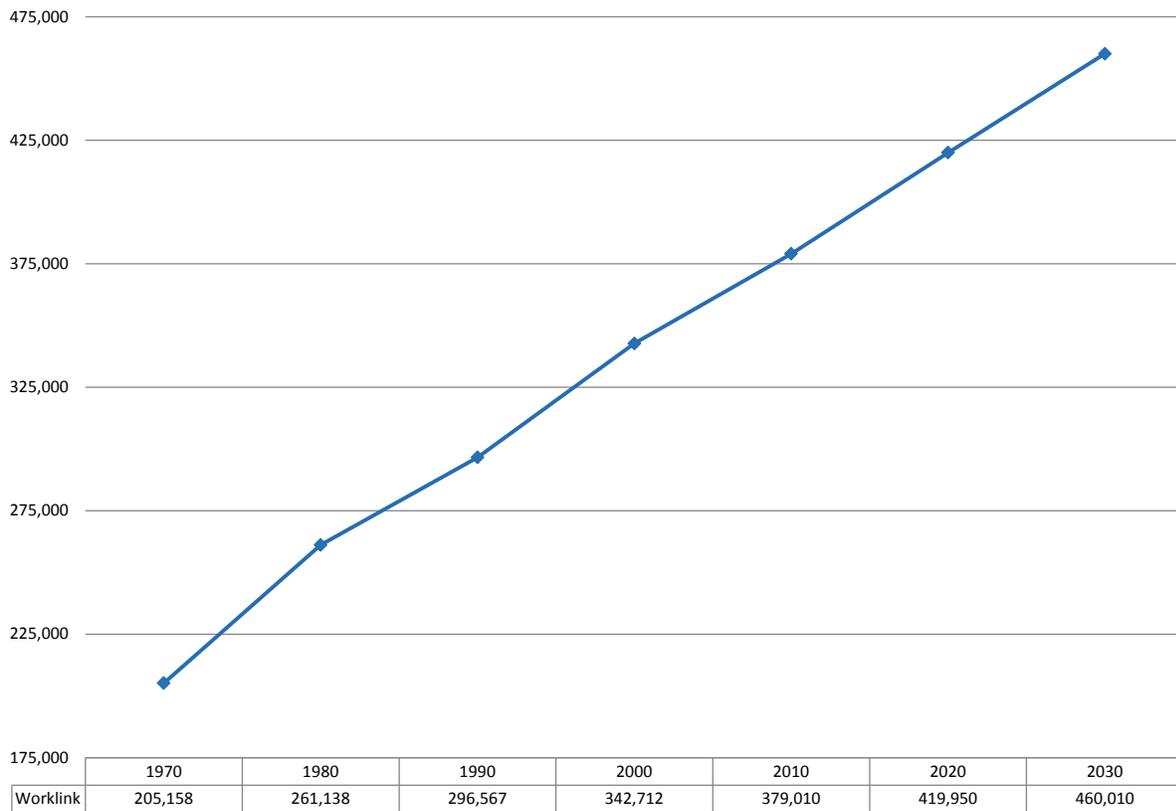
Figure 12: Population by Age

Age Range	Worklink	SC	US
0-4	6.0%	6.5%	6.6%
5-9	6.0%	6.4%	6.6%
10-14	6.5%	6.5%	6.7%
15-19	7.6%	7.2%	7.2%
20-24	7.8%	7.2%	7.0%
25-29	5.7%	6.6%	6.8%
30-34	5.7%	6.2%	6.4%
35-39	6.2%	6.5%	6.6%
40-44	6.7%	6.8%	7.0%
45-49	7.1%	7.2%	7.4%
50-54	7.0%	7.0%	7.2%
55-59	6.4%	6.5%	6.3%
60-64	6.3%	5.9%	5.3%
65-69	4.9%	4.5%	3.9%
70-74	3.8%	3.3%	3.0%
75-79	2.7%	2.5%	2.4%
80-84	2.0%	1.7%	1.9%
85 and older	1.7%	1.5%	1.7%

Source: US Bureau of Census, American Community Survey (ACS)

POPULATION CHANGE AND MIGRATION

Figure 13: Population Projections to 2030



Source: US Census Bureau, Census 2000, SC Department of Health and Environmental Control - Vital Records Department. Population projections calculated by SC Budget and Control Board, Office of Research and Statistics

After a large jump in population from 1990 to 2000 (up 15.6 percent), the growth of the population of this area slowed down, growing just 10.6 percent over the next 10 years. Growth is projected to increase by about one percent per year to 2030.

Figure 14: Population Migration - 2011 - 5-Year Estimate

	Total	Moved From Different State	Moved From Abroad	Moved From Different County	Moved Within Same County
Population 1 year and over	374,211	2.7%	0.4%	3.7%	9.3%
Hispanic or Latino origin (of any race)	11,889	2.9%	3.5%	7.5%	13.4%
White alone, not Hispanic or Latino	310,860	2.8%	0.2%	3.5%	8.0%
Population 25 Years and Over					
Less than high school graduate	46,405	1.5%	0.4%	1.8%	10.6%
High school graduate/GED	80,824	1.5%	0.3%	2.0%	7.3%
Some college or associate's degree	71,908	2.1%	0.1%	2.3%	6.5%
Bachelor's degree	31,202	3.5%	0.1%	3.0%	4.7%
Graduate or professional degree	19,378	5.0%	1.1%	2.2%	3.4%

Source: US Census Bureau, ACS, SCDEW

In-migration (people moving into WorkLink) shows that over six percent of residents with a gradu-

ate degree came from out of state or out of the country. This shows the strength of having a major research institution in Clemson University within the area. While nearly the same proportion, just under 3 percent each, of Hispanics and Whites moved into WorkLink from another state, 3.5 percent of Hispanics came from abroad. Though 16 percent of residents moved, only 3.1 percent came from outside of South Carolina.

COMMUTING PATTERNS

Most of the workers (70 percent) of WorkLink live and work in the LWIA. The tables in Figure 15 show that over 13,000 workers commute in from other areas to work in the LWIA. Greenville County draws a sizeable portion of WorkLink County’s residents out of the area to work. Over 25,000 more residents commute out of the area than come in to work.

Figure 15: Commuting Patterns - 2010

To WorkLink WIA From	13,355	From WorkLink WIA To	38,815
Greenville County, SC	7,280	Greenville County, SC	30,286
Abbeville County, SC	1,628	Spartanburg County, SC	2,574
Hart County, GA	476	Greenwood County, SC	573
Spartanburg County, SC	452	Abbeville County, SC	433
		Laurens County, SC	312

Source: US Census Bureau, ACS

EDUCATIONAL ATTAINMENT

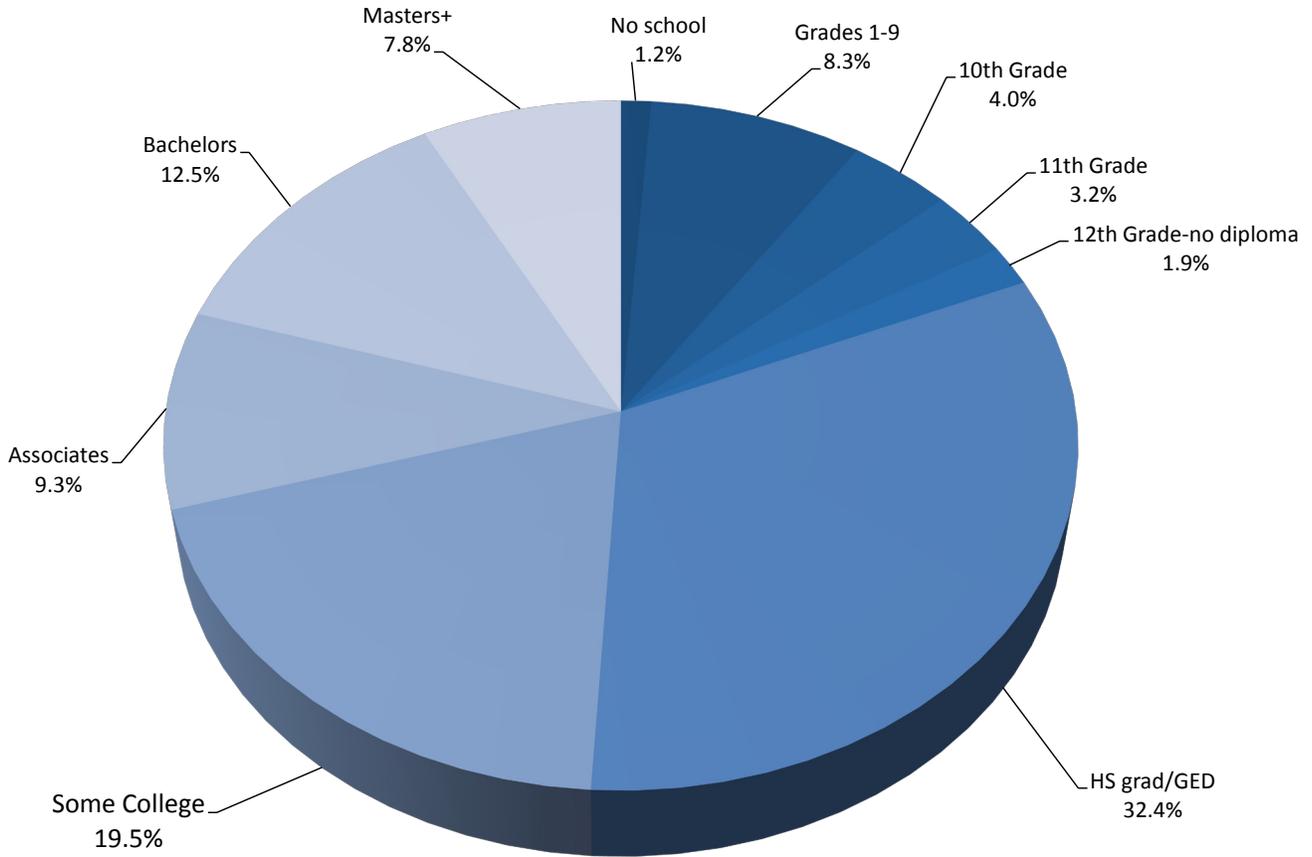
The WorkLink LWIA has a 1.5 percent higher concentration of residents with a high school diploma or GED than the state. However, the WorkLink LWIA has a higher percent of residents with less than a high school diploma or GED and also a lower percent of residents with a Bachelor’s or Master’s degree than the state.

Figure 16: Educational Attainment - WorkLink and South Carolina 2011

Education Level	Worklink	SC
No school	1.2	1.1
Grades 1-9	8.3	7.0
10th Grade	4.0	3.3
11th Grade	3.2	3.2
12th Grade-no diploma	1.9	1.8
HS grad/GED	32.4	30.9
Some College	19.5	20.1
Associates	9.3	8.4
Bachelors	12.5	15.6
Masters+	7.8	8.6

Source: US Census Bureau, ACS, SCDEW

Figure 17: Educational Attainment - WorkLink 2011

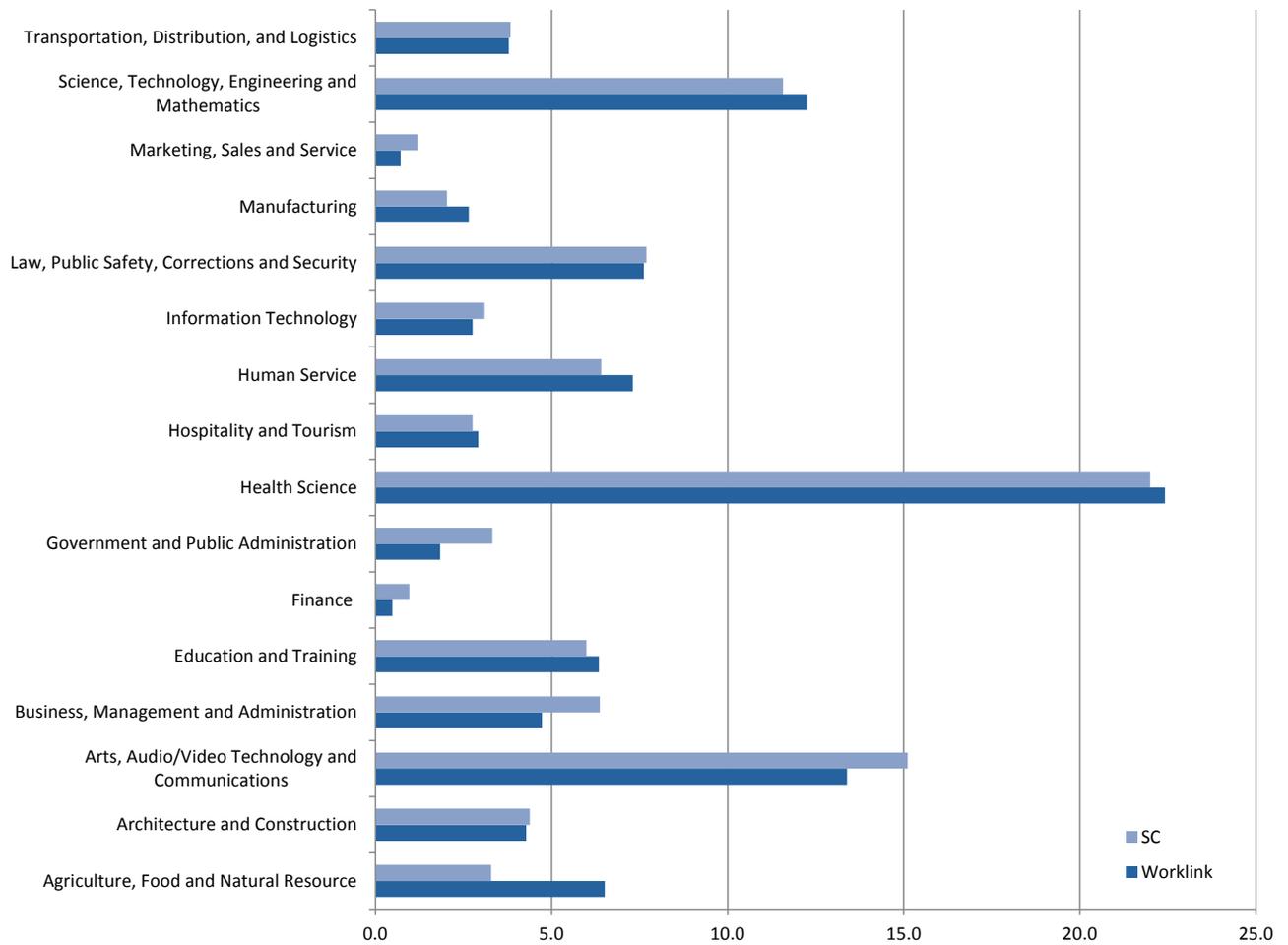


Source: US Census Bureau, ACS, SCDEW

CAREER CLUSTERS SELECTED BY HIGH SCHOOL STUDENTS

Eighth-grade students in South Carolina are required to choose a career cluster to concentrate on to lead them to a post-high school job or college major. There are 16 career clusters.

Figure 18: Percent of Students Declaring a Career Clusters In WorkLink and SC - 2012



Note: Declared clusters for students declaring a specific cluster on their primary Electronic Individual Graduation Plan (e-IGP) for 2011-2012 year

Source: SC Department of Education

Many students in the WorkLink area have chosen the Health Science career cluster in response to news of a shortage of healthcare workers in South Carolina. In keeping with the state trend, the area's students also picked the Arts, Audio/Video Technology and Communications cluster and the Science, Technology, Engineering and Math (STEM) cluster in notable numbers.

Figure 19: Career Clusters - 2012

Cluster	Worklink	SC
Agriculture, Food and Natural Resource	6.5	3.3
Architecture and Construction	4.3	4.4
Arts, Audio/Video Technology and Communications	13.4	15.1
Business, Management and Administration	4.7	6.4
Education and Training	6.3	6.0
Finance	0.5	1.0
Government and Public Administration	1.8	3.3
Health Science	22.4	22.0
Hospitality and Tourism	2.9	2.8
Human Service	7.3	6.4
Information Technology	2.8	3.1
Law, Public Safety, Corrections and Security	7.6	7.7
Manufacturing	2.6	2.0
Marketing, Sales and Service	0.7	1.2
Science, Technology, Engineering and Mathematics	12.3	11.6
Transportation, Distribution, and Logistics	3.8	3.8

Source: SC Department of Education

DEGREES AWARDED

In higher education, WorkLink area colleges and universities have conferred a wide variety of awards. Of the top 20, Business Administration and Management are the two most popular followed by Teacher Education. The institutions included in this data are Anderson University, Clemson University, Southern Wesleyan University, and Tricounty Technical College.

Figure 20: Top 20 Majors in WorkLink - 2011

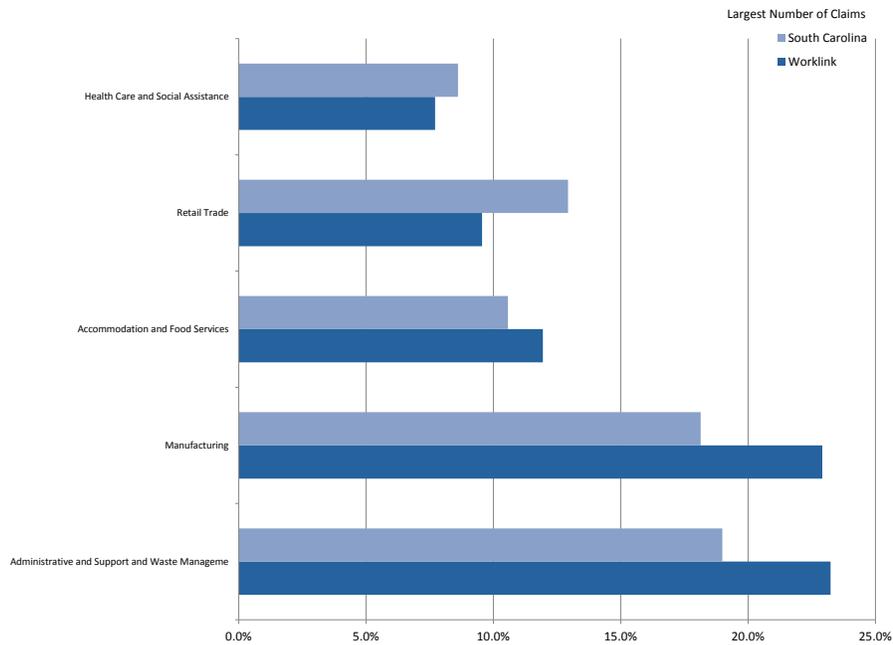
Majors	
Business Administration and Management, General	331
Management	314
Teacher Ed. and Professional Develop., Spec Levels	219
Mechanical Engineering	207
Civil Engineering, General	202
Psychology, General	174
Marketing/Marketing Management, General	169
Biology/Biological Sciences, General	165
Registered Nursing/Registered Nurse	165
Parks, Recreation and Leisure Facilities Mgmt.	138
Health Professions and Related Clinical Sciences	134
Finance, General	127
Accounting	124
Liberal Arts and Sciences/Liberal Studies	124
Computer and Information Sciences, General	119
Nursing - Registered Nurse Training, BSN Generic	117
Welding Technology/Welder	108
Elementary Education and Teaching	106
Architecture	97
Political Science and Government, General	97

Source: SC Commission on Higher Education, http://www.che.sc.gov/New_Web/Data&Pubs.htm

CHARACTERISTICS OF UI CLAIMS BY OCCUPATION

Another source of supply for the workforce is people who are receiving unemployment compensation. In the WorkLink LWIA area, the highest number of claims are filed are in the Administrative and Support and Waste Management and Remediation Services group followed by Manufacturing. This is in line with the areas industry concentration of manufacturing companies and the industries that support manufacturing.

Figure 21: Characteristics of UI Claims by Occupation - April 2013



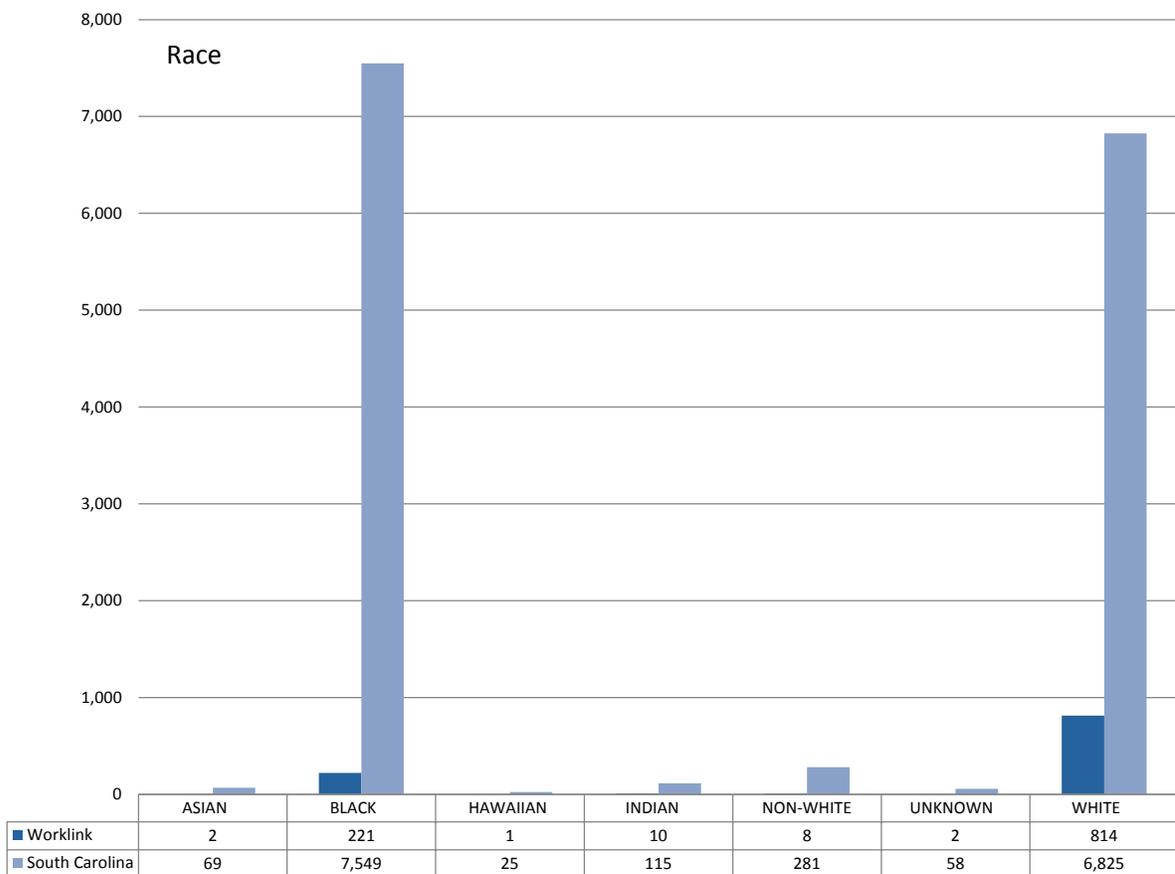
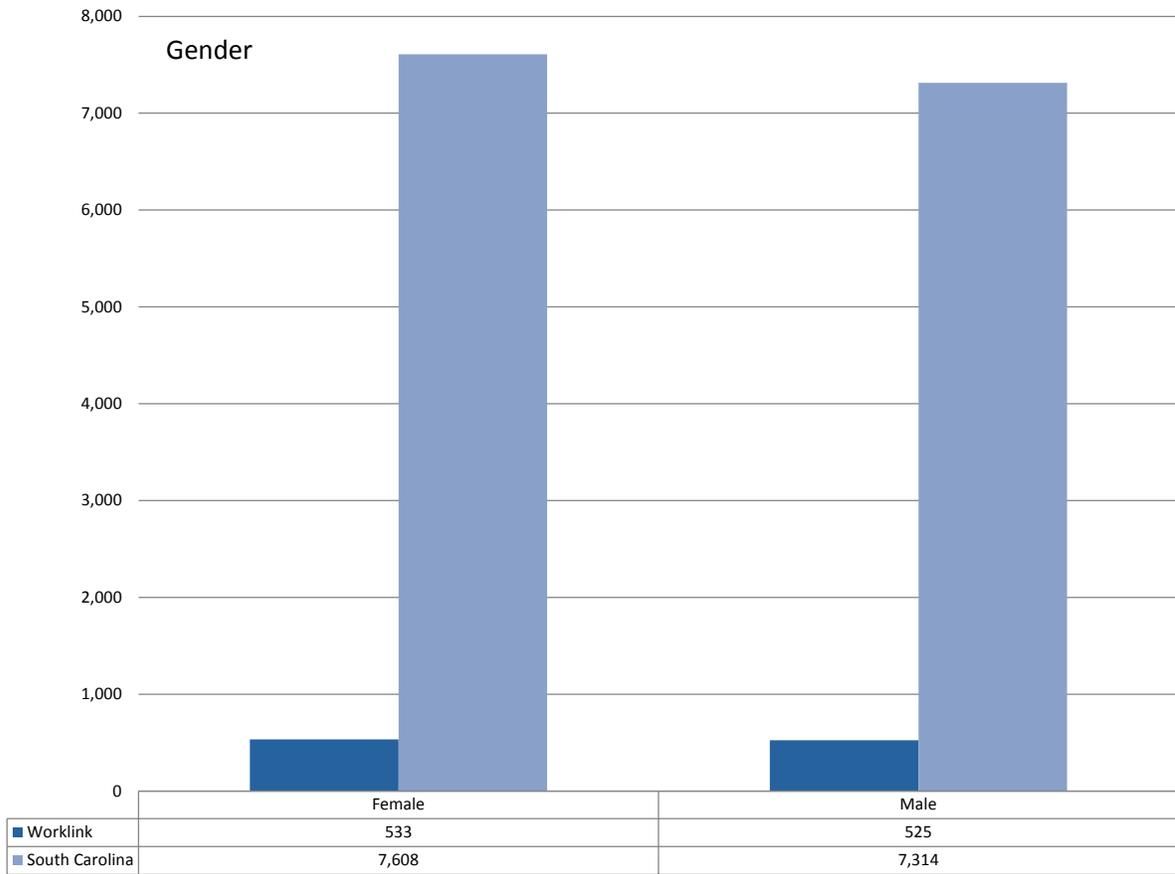
Occupation	Worklink	South Carolina
Administrative and Support and Waste Management	214	2,373
Manufacturing	211	2,267
Accommodation and Food Services	110	1,321
Retail Trade	88	1,616
Health Care and Social Assistance	71	1,076
Construction	61	820
Professional, Scientific, and Technical Service	52	698
Other Services (except Public Administration)	21	292
Wholesale Trade	20	445
Real Estate and Rental and Leasing	16	213
Educational Services	15	222
Transportation and Warehousing	13	414
Finance and Insurance	12	300
Public Administration	9	206
Utilities	3	22
Information	3	122
Arts, Entertainment, and Recreation	2	94

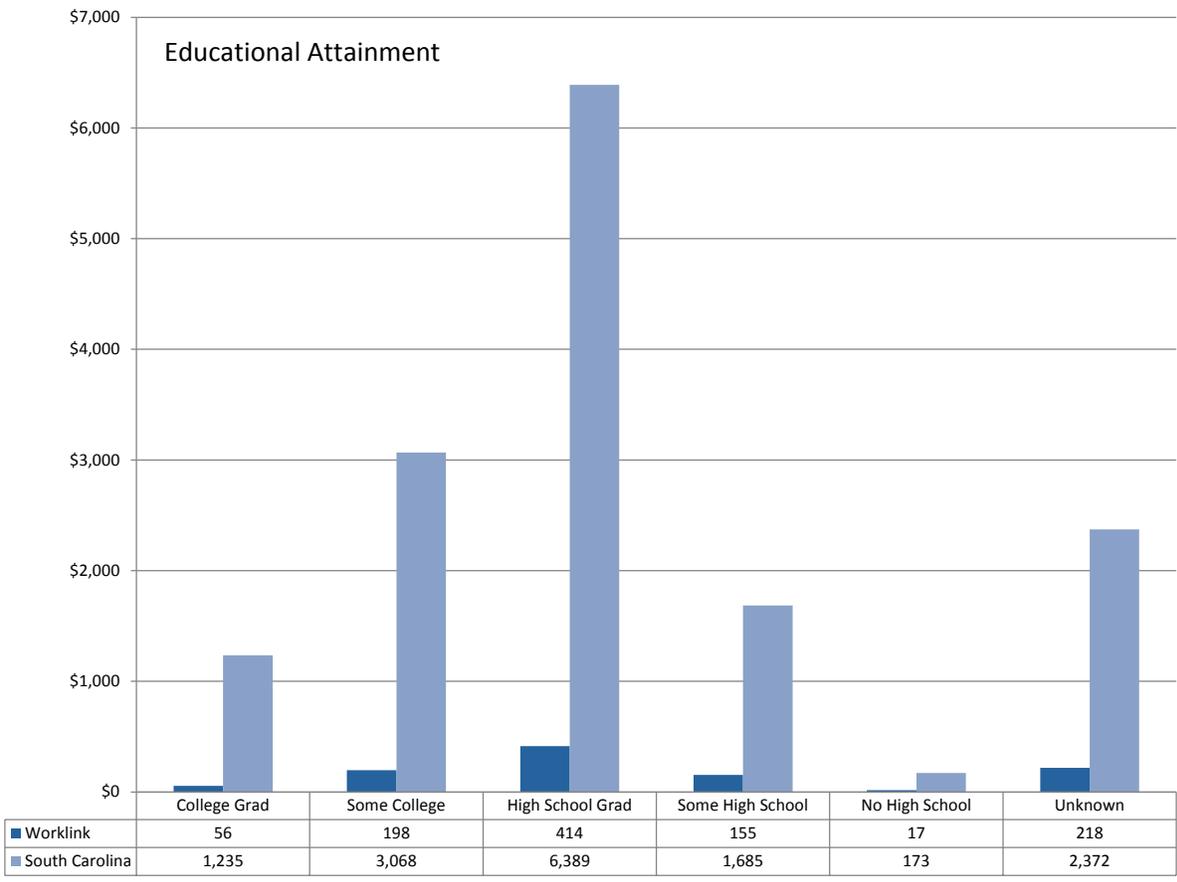
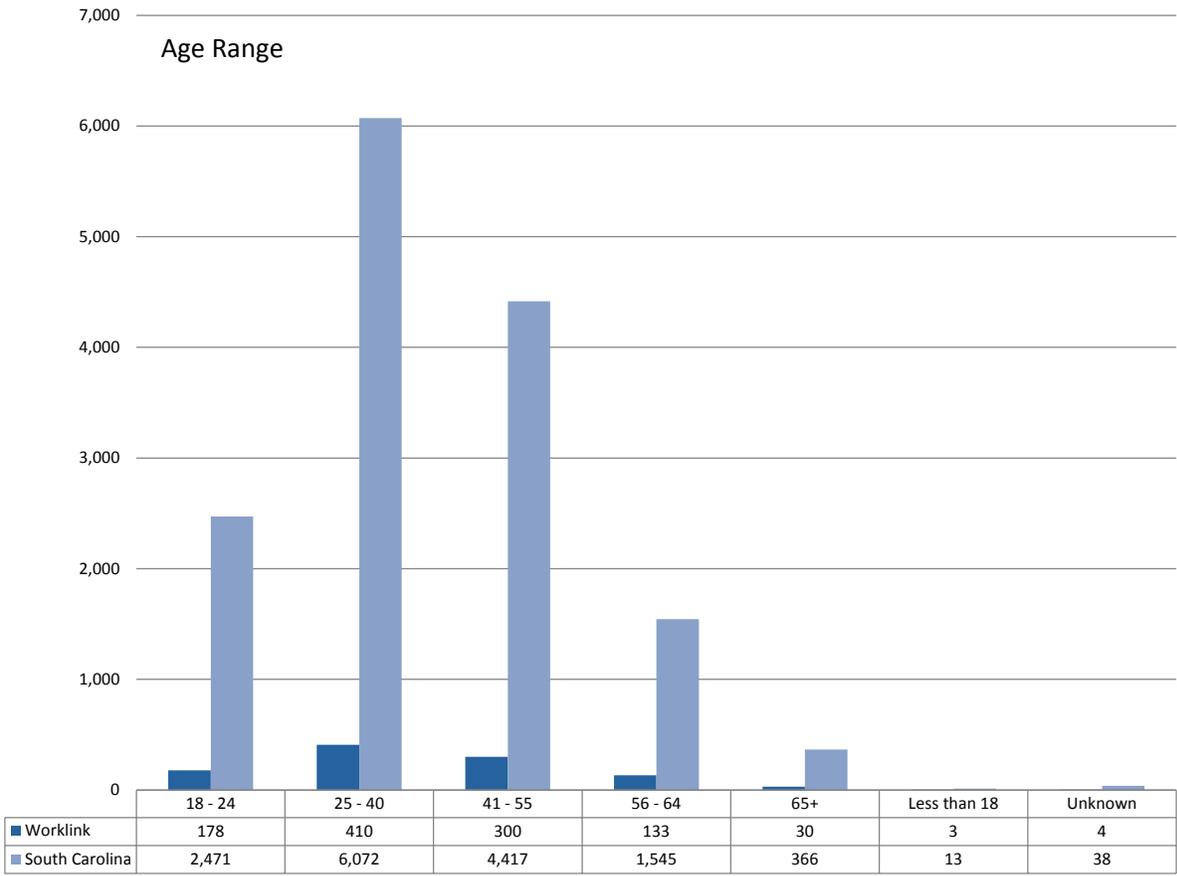
Source: SCDEW

UNEMPLOYMENT INSURANCE CLAIMANT CHARACTERISTICS

The people in this area who were receiving unemployment insurance benefits in April 2013 were typically female, white, 25-40 years old, and were high school graduates or earned a GED.

Figure 22: UI Claimant Characteristics - April 2013





Source: SCDEW

DEMAND: WHAT DO WE NEED?

Workforce demand shows what is needed in an area to support current and future employers. This section examines current (real-time) demand through online job advertisements, industry and occupational projections to 2018, educational requirements for future jobs, and the skills needed for those occupations.

Online job advertisements give a snapshot of what positions need to be filled in an area. The data is from the Conference Board Help Wanted OnLine® Data Series (HWOL) which measures the number of new and reposted job ads from over 16,000 Internet job boards. In April 2013, the largest occupational group with job ads in the WorkLink LWIA was Healthcare Practitioners and Technical Occupations followed by Sales and Related Occupations.

ONLINE JOB ADVERTISEMENTS

Figure 23: WorkLink HWOL - April 2013 by Major Group

Occupation	# of Job Ads
Healthcare Practitioners and Technical Occupations	610
Sales and Related Occupations	294
Office and Administrative Support Occupations	210
Transportation and Material Moving Occupations	188
Architecture and Engineering Occupations	180
Computer and Mathematical Occupations	172
Management Occupations	152
Production Occupations	131
Installation, Maintenance, and Repair Occupations	125
Healthcare Support Occupations	121
Food Preparation and Serving Related Occupations	110
Construction and Extraction Occupations	57
Business and Financial Operations Occupations	50
Education, Training, and Library Occupations	48
Arts, Design, Entertainment, Sports, and Media Occupations	46
Personal Care and Service Occupations	43
Building and Grounds Cleaning and Maintenance Occupations	41
Community and Social Services Occupations	35
Protective Service Occupations	27
Life, Physical, and Social Science Occupations	15
Legal Occupations	3

Note: A job advertisement may include multiple openings.

Source: The Conference Board Help Wanted OnLine® Data Series (HWOL)

INDUSTRY PROJECTIONS

The Healthcare and Social Assistance industry is projected to have the largest growth from 2008 to 2018, growing by 3,055 jobs or 306 jobs/year. This sector includes services such as ambulatory health care services, hospitals, nursing and residential care facilities, and social assistance services. Administrative and Support and Waste Management and Remediation Services reports the next largest growth with a projected 245 openings/year. This sector includes office administrative services; facilities support services; employment services; services to buildings and dwellings; and waste collection, treatment, and disposal services.

Figure 24: Industry Projections - 2008-2018

Industry	Estimate Employment (2008)	Projected Employment (2018)	Change	Percent Change	Annual Percent Change
Total Employment, All Jobs	131,959	140,520	8,561	6.49	0.63
Health Care and Social Assistance	14,299	17,354	3,055	21.37	1.96
Administrative and Support and Waste Management and Remediation	5,197	7,647	2,450	47.14	3.94
Educational Services	15,003	17,403	2,400	16.00	1.50
Other Services (Except Government)	5,923	6,646	723	12.21	1.16
Professional, Scientific, and Technical Services	2,101	2,626	525	24.99	2.26
Retail Trade	15,796	16,288	492	3.11	0.31
Accommodation and Food Services	13,429	13,867	438	3.26	0.32
Arts, Entertainment, and Recreation	1,322	1,522	200	15.13	1.42
Management of Companies and Enterprises	325	434	109	33.54	2.93
Transportation and Warehousing	1,466	1,550	84	5.73	0.56
Real Estate and Rental and Leasing	863	940	77	8.92	0.86
Information	1,085	1,128	43	3.96	0.39
Wholesale Trade	2,558	2,585	27	1.06	0.11
Finance and Insurance	2,397	2,406	9	0.38	0.04
Government	6,621	6,567	-54	-0.82	-0.08
Utilities	1,860	1,698	-162	-8.71	-0.91
Construction	7,416	7,222	-194	-2.62	-0.26
Manufacturing	24,652	23,121	-1,531	-6.21	-0.64

Source: BLS, SCDEW, QCEW, WI

OCCUPATIONAL PROJECTIONS

Many of the jobs that are projected to have numerous openings between 2008 and 2018 in this area are jobs that have high turnover due to low wages. The need for increased health services (for the aging Baby Boomers) puts healthcare-related jobs near the top of the projections list with seven projected occupations, including Medical Assistants, Pharmacy Technicians, and Personal and Home Care Aides. Landscaping and Groundskeeping occupations lead the projected employment listing with Public Relations Specialists, and Preschool Teachers included as well.

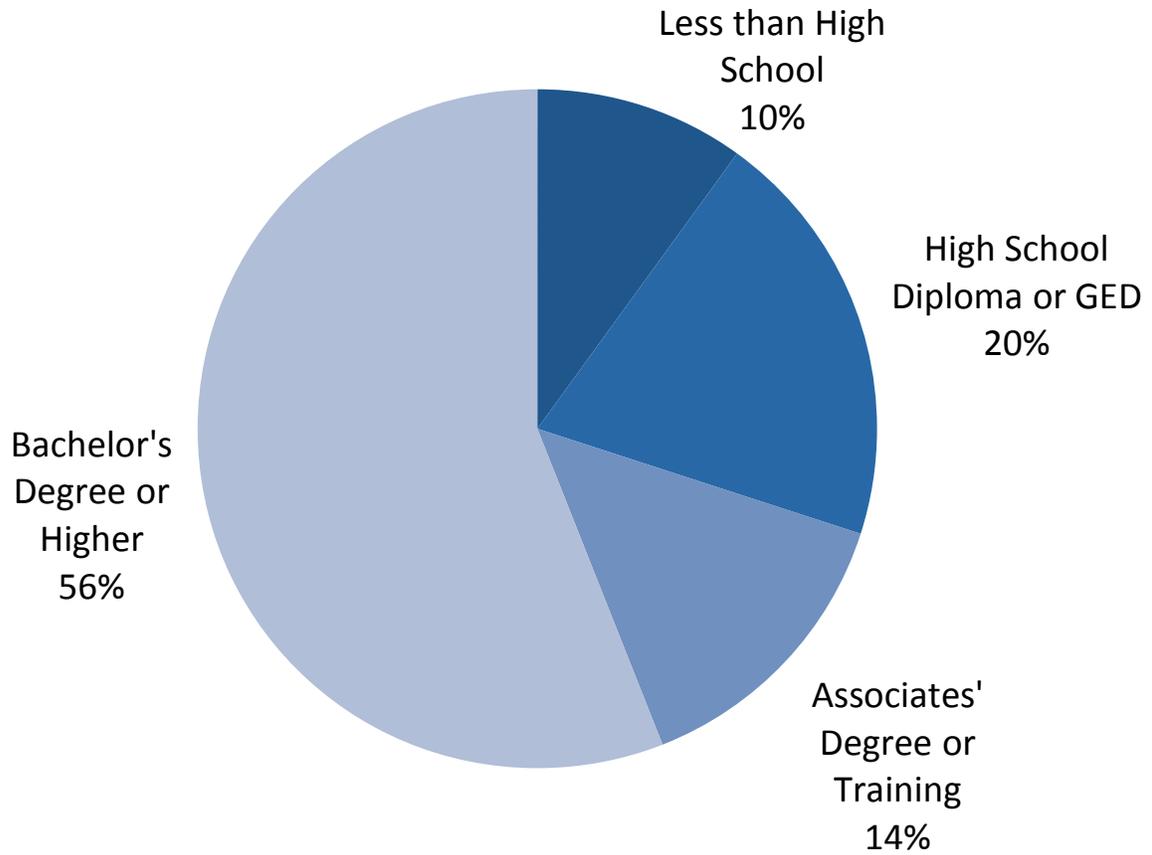
Figure 25: Growing Occupations - 2008-2018

Occupation	Estimated Employment (2008)	Projected Employment (2018)
Landscaping and Groundskeeping Workers	1,683	2,117
Medical Assistants	621	804
Public Relations Specialists	462	580
Pharmacy Technicians	395	536
Preschool Teachers, Except Special Education	393	522
First-Line Supervisors/Managers of Landscaping Workers	337	436
Coaches and Scouts	234	299
Food Servers, Nonrestaurant	212	275
Dental Assistants	191	256
Personal and Home Care Aides	151	230
Dental Hygienists	169	227
Management Analysts	155	211
Physical Therapists	160	207
Physician Assistants	105	140
Compliance Officers, Except Agriculture	102	130
Instructional Coordinators	97	127
Hazardous Materials Removal Workers	39	53
Veterinarians	32	42
Environmental Engineers	25	32
Materials Engineers	15	19

Source: BLS, SCDEW, OES, WI

Of the top 50 projected growing occupations by percent change, 10 require a high school diploma or GED, five require less than a high school diploma or GED, 28 require a bachelor’s degree or more, seven need an associate’s degree or require some kind of postsecondary training. All of the five requiring less than a high school diploma or GED do require short-term on-the-job training (OJT), which is defined by the US Department of Labor as less than one month.

Figure 26: Education for Top 50 Projected Occupations



Source: BLS, SCDEW, OES, WI

It is just as important to know which occupations are declining in the area. Declines are often due to technological advances (i.e. computers or robots replacing humans), so many of the declining occupations are projected to be in textile manufacturing and administration, as shown in Figure 27.

Figure 27: Top 20 Projected Declining Occupations in WorkLink - 2008-2018

Occupation
Brickmasons and Blockmasons
Computer Operators
Electrical and Electronics Repairers, Commercial
Extruding and Forming Machine Setters, Operators
Farmworkers & Laborers, Crop, Nursery & Greenhouse
File Clerks
Inspectors, Testers, Sorters, Samplers & Weighers
Machine Feeders and Offbearers
Mail Clerks and Mail Machine Operators
Maintenance Workers, Machinery
Meter Readers, Utilities
Order Clerks
Postal Service Clerks
Postal Service Mail Sorters, Processors
Roofers
Sewing Machine Operators
Stationary Engineers and Boiler Operators
Textile Cutting Machine Setters, Operators, Tenders
Textile Knitting and Weaving Machine Setters
Textile Winding, Twisting, and Drawing Out Machine

Source: BLS, SCDEW, OES, WI

SKILLS OF PROJECTED OCCUPATIONS

Using the top 50 projected growing occupations, the skill levels needed for the future workforce based on the definitions given earlier in this report can be categorized.

Figure 28: Skill Levels

Low	6
Middle	16
High	28

Source: BLS, SCDEW, OES, WI

Low-skilled jobs often have commensurate (i.e. low) pay and do not require much education, experience, or OJT. Does the supply of workers have the right skills for the jobs in the future?

WORKFORCE CHALLENGES

The current economic situation in the WorkLink LWIA, the supply of workers, and the characteristics of workers who will be in demand has been reviewed. What can be gleaned from these findings? Are there gaps between supply and demand?

Supply Findings

With the population growing steadily until 2030 but a smaller-than-the-state share of 25-39 year olds, this area looks to have a challenge in having a proper mix of workers. In-migration from other states/countries adds a notable number of residents at the top end of the educational spectrum. But the LWIA has a higher percent of residents aged 25 and older with less than a high school diploma than the state as a whole. WorkLink LWIA exceeds the state with a higher proportion of its residents having a high school diploma/GED.

Many high school students selected the Health Science career cluster in keeping with state trends. The next most popular career cluster was Arts, Audio/Video/Technology, and Communications.

Demand Findings

Employer demand was consistent between online advertisements (current) and 2018 projected occupations (long-term needs) in general. Among the leaders by the need for workers were Business, Management, and Administration; Health Science; and Marketing, Sales, and Service. Hospitality and Tourism and Manufacturing were long-term demands. Most of the top projected occupations require at least a high school diploma or GED.

Figure 29: Comparison of Supply and Demand

	Demand		Supply	
	Top online ads	Projected Occupations	Degrees Earned	Career Clusters
Agriculture, Food and Natural Resource	1.9	4.1	7.3	6.5
Architecture and Construction	5.7	5.4	5.2	4.3
Arts, Audio/Video Technology and Communications	2.2	1.2	1.9	13.4
Business, Management and Administration	10.9	14.2	17.2	4.7
Education and Training	1.4	8.1	17.3	6.3
Finance	3.2	1.5	1.9	0.5
Government and Public Administration	0.2	0.2	1.8	1.8
Health Science	25.4	9.3	9.1	22.4
Hospitality and Tourism	3.6	14.7	0.0	2.9
Human Service	5.0	6.5	7.2	7.3
Information Technology	4.6	1.2	3.0	2.8
Law, Public Safety, Corrections and Security	1.1	1.9	0.9	7.6
Manufacturing	5.6	11.3	4.2	2.6
Marketing, Sales and Service	15.0	13.8	3.0	0.7
Science, Technology, Engineering and Mathematics	7.1	1.7	19.4	12.3
Transportation, Distribution, and Logistics	7.2	5.0	0.5	3.8

Source: BLS, SCDEW, WI, SC Department of Education, OES, HWOL

A few observations about the comparison that could be considered challenges to the workforce pipeline include:

- There are too few students and graduates in Marketing, Sales and Service than are needed in the short and long terms.
- There are more students and graduates in STEM than is required by employers in the short and long terms.
- There is a short-term employment need of Health Science and Transportation, Distribution, and Logistics graduates that is not being met.
- There is a long-term demand for Manufacturing; Hospitality and Tourism; and Business, Management, and Administration that is not projected to be met by today's students.
- There are notably more graduates in Agriculture, Food and Natural Resource; Business, Management and Administration; and Education and Training than there are current open positions in the area.
- There are more students choosing Law, Public Safety, Corrections and Security; Arts, Audio/ Video Technology and Communication; and Health Science that will far outpace employment demand long term.

There is always a demand for employees with soft skills. It is said that hard skills (training, degrees, or certification) get you hired, but soft skills get you fired. Many of our residents need to learn or get a refresher in soft skills in order to KEEP their jobs. Employers see the need.

Top 10 Soft Skills Found in Online Ads for South Carolina (April 2013)

1. Oral and written communication skills
2. Customer Service Oriented
3. Problem solving
4. Detail oriented
5. Microsoft Office
6. Self-starting / Self-motivated
7. Organizational skills
8. Troubleshooting
9. Work independently
10. Sales experience

Source: *The Conference Board Help Wanted OnLine*® Data Series (HWOL)

CONCLUSION

The workforce (current and potential) in the WorkLink LWIA area faces several challenges. The population continues to increase steadily, but the education level for the population is lower than the state as a whole with lower percentages of residents with education beyond high school. There are high levels of employers advertising for jobs in business, management, marketing, and sales, and health care. However, some supply flows could be fine-tuned to be more in line with demand.

The data shows:

- There is an undersupply of students choosing Business, Management and Administration; Hospitality and Tourism; Manufacturing; and Marketing, Sales and Service studies to meet future demand.
- There is an oversupply of students choosing Arts, Audio/Video Technology and Communication; Law, Public Safety, Corrections and Security; Health Sciences; and STEM that will far outpace the area's future demand.
- Comprehensive soft skills training is needed for all students and job seekers (high school, post-secondary, adult, new and returning entrants to the labor force, and incumbent workers) so that they can retain their position and reduce employee turnover.

Getting education in alignment with the demands of employers will help the WorkLink LWIA meet the challenges it faces.