

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.

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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.

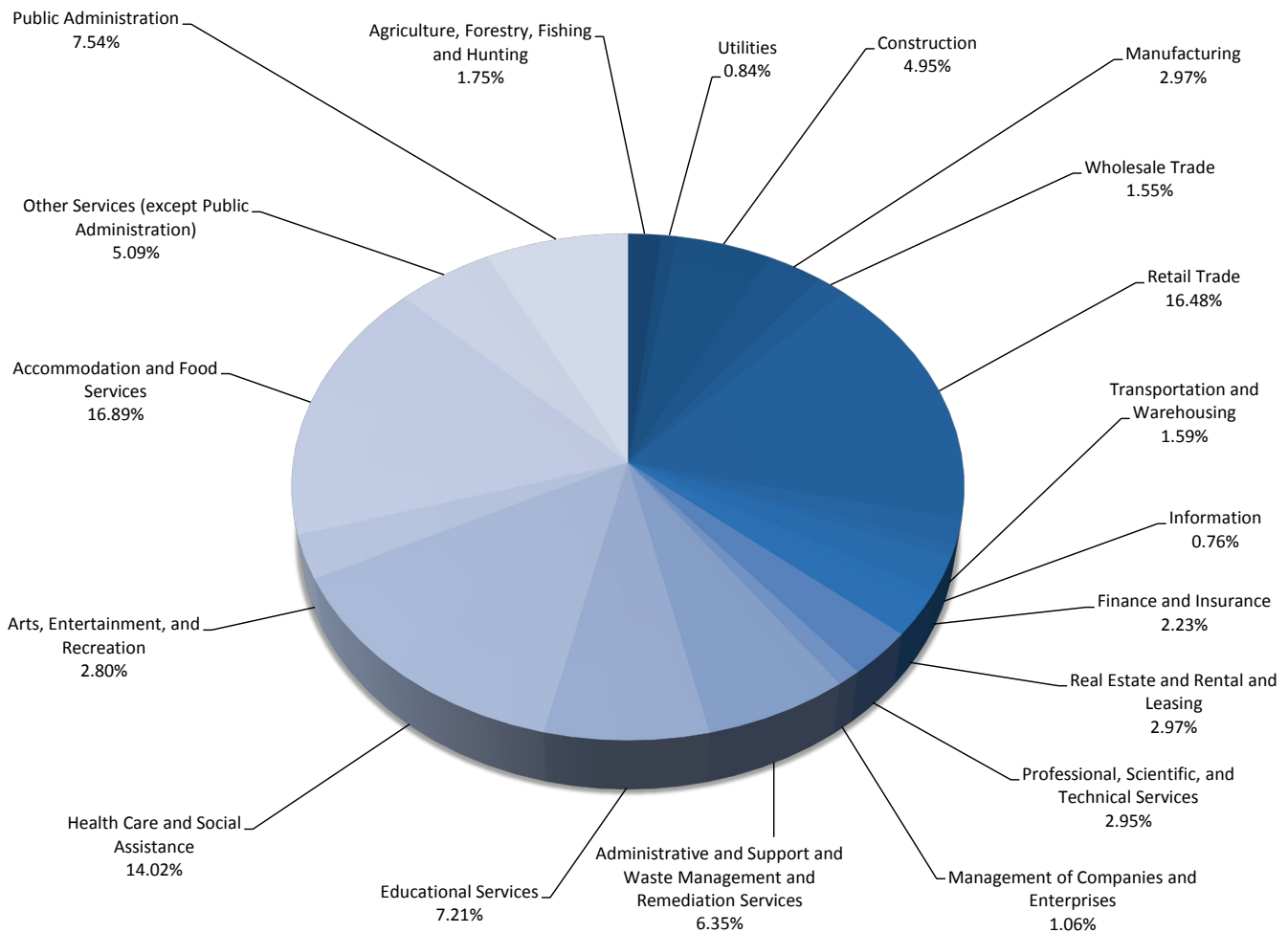
The economic changes this year in the Lowcountry LWIA demonstrate the shifting needs of employers and employees. Cultivating an understanding of the workforce allows all four counties to respond to anticipated future needs. Analyses help to identify the gap between what the workforce has in the way of 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

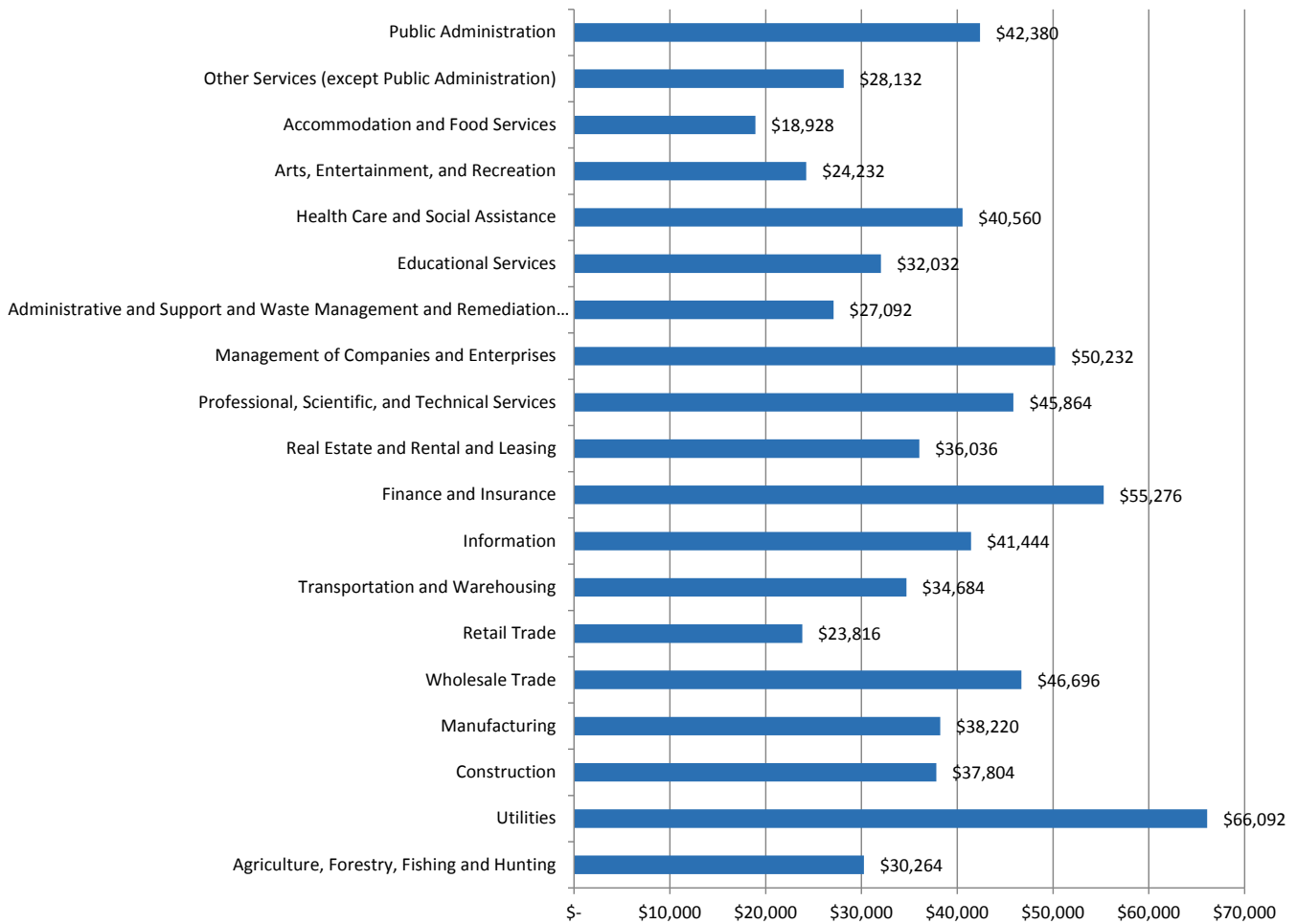
Forestry and Logging tops the most concentrated industries in this area with location quotients over 35 in Colleton, Hampton, and Jasper counties. Other sectors located throughout the area include Agriculture, Forestry, Fishing and Hunting; Natural Resources and Mining; and Wood Product and Nonmetallic 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)

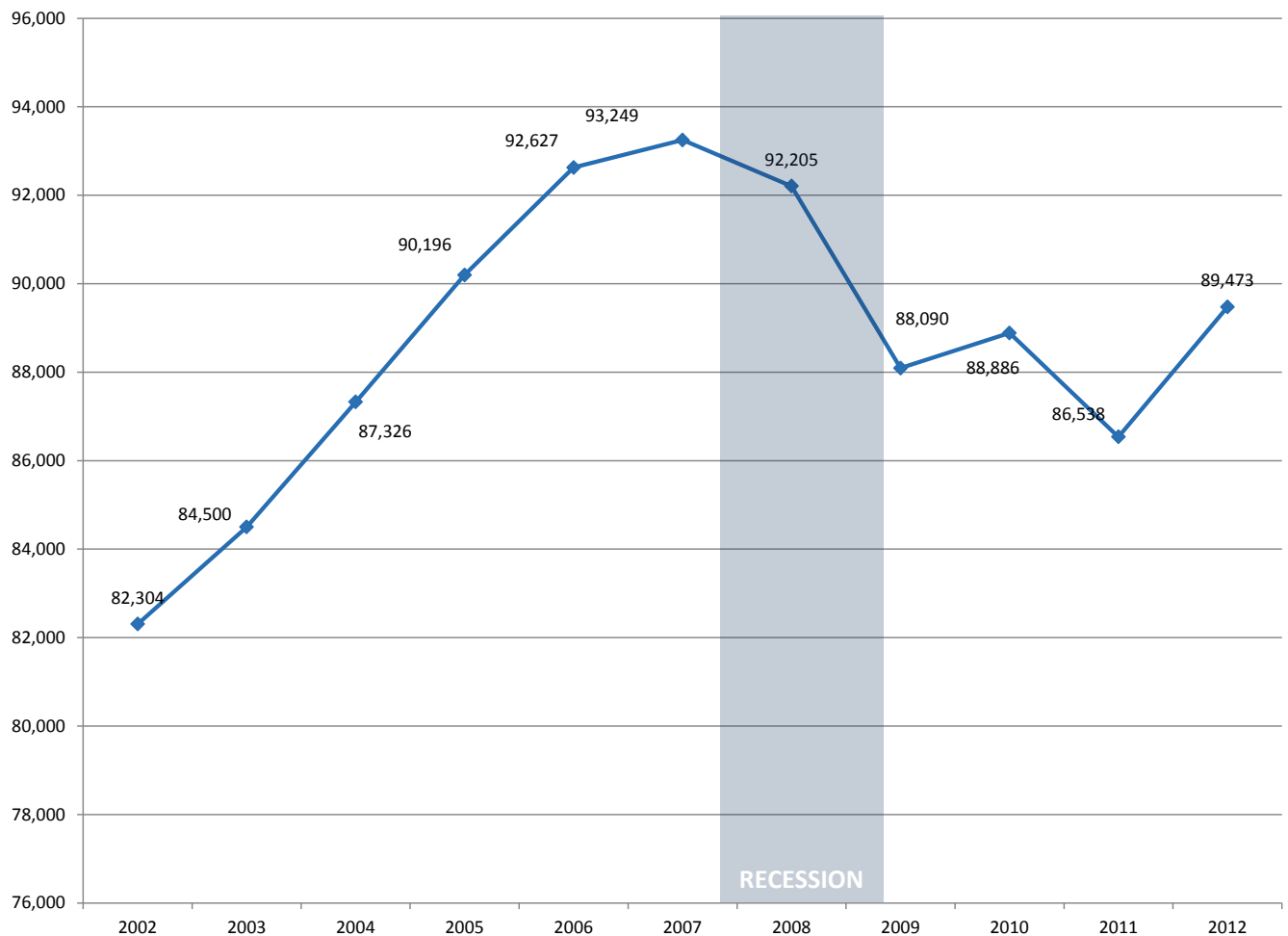
EMPLOYMENT AND UNEMPLOYMENT

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

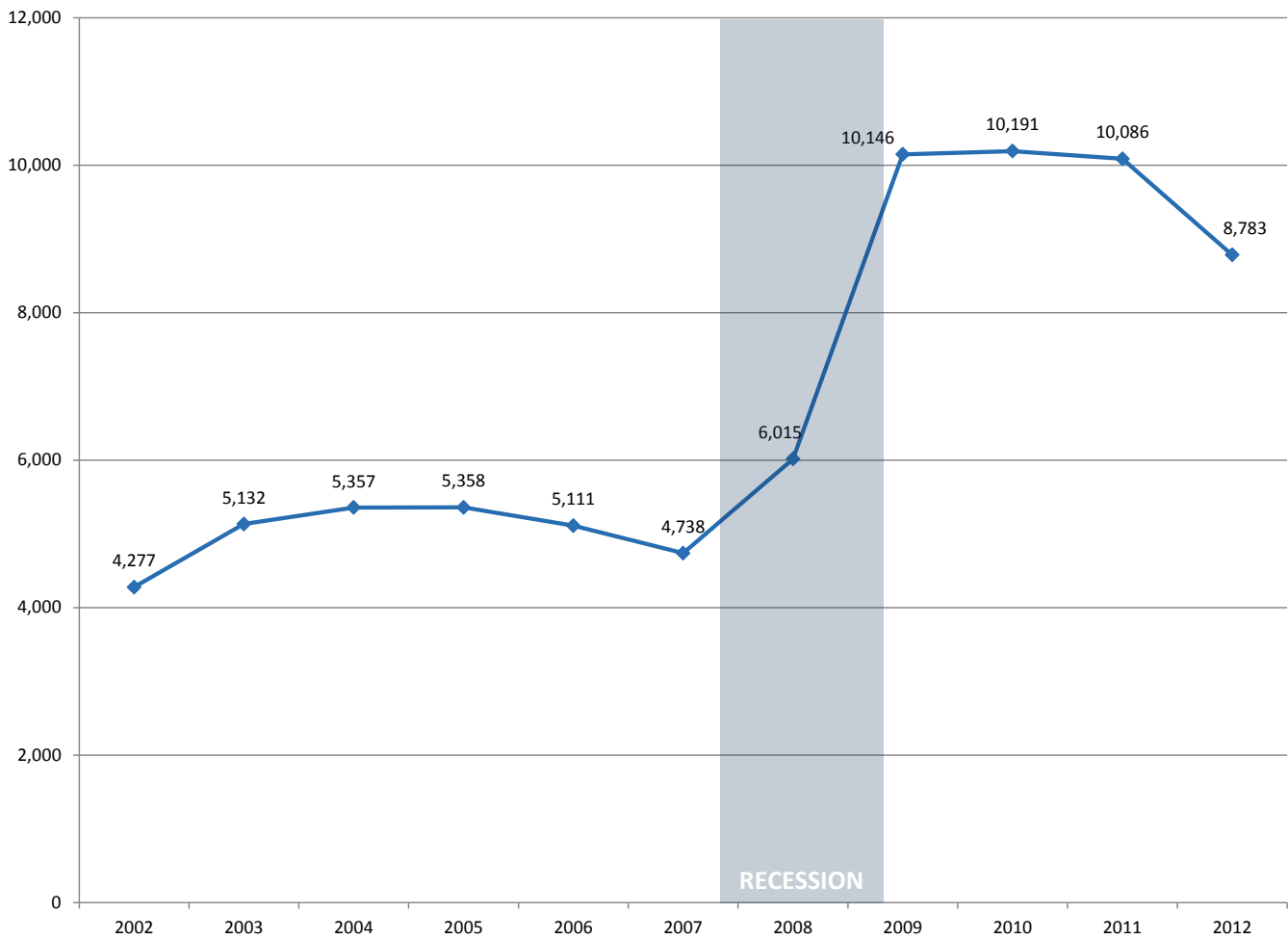
In Figure 6, the recession (officially from December 2007 through June 2009) had a great effect on the labor force. Employment dropped, and unemployment increased by 114 percent.

Figure 6: Employment - 2002-2012



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

Figure 7: Unemployment - 2002-2012

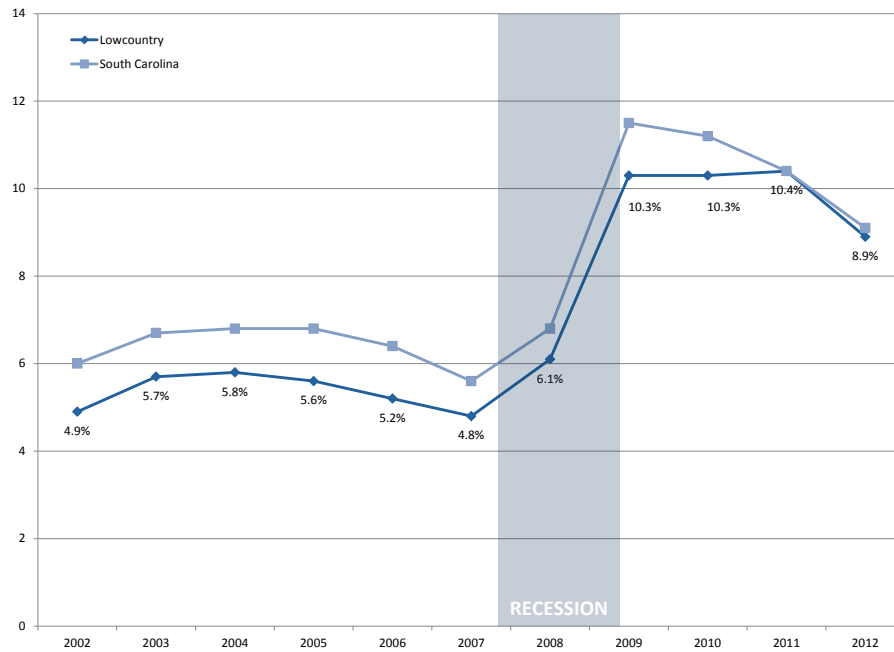


Source: BLS, SCDEW, LAUS

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.

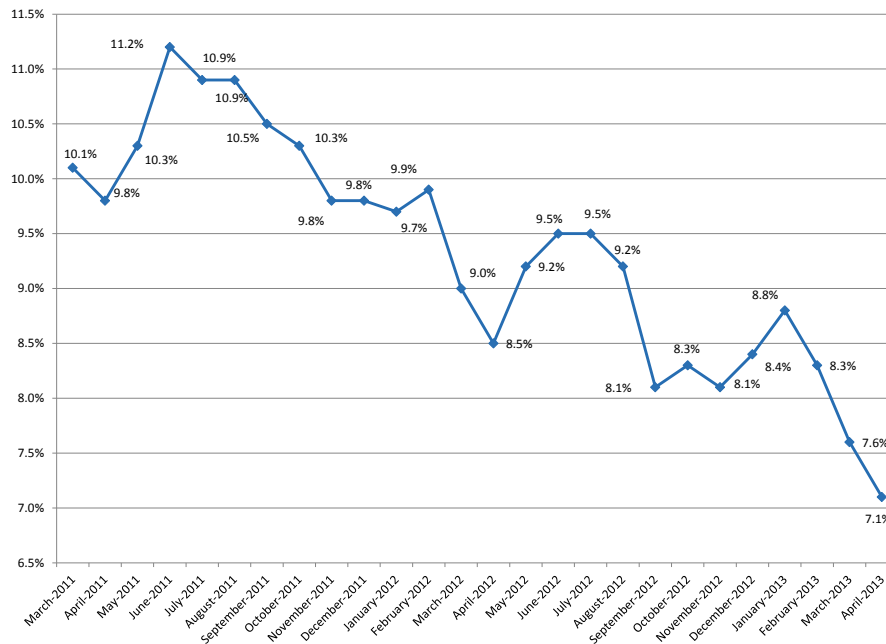
Figure 8: Annual Unemployment - 2002-2012



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



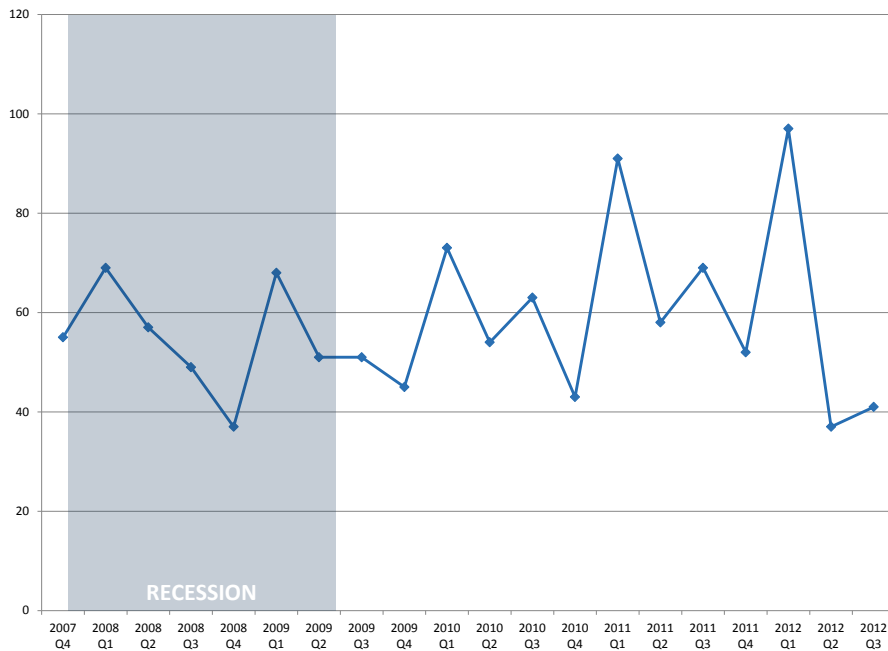
Source: BLS, SCDEW, LAUS

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.

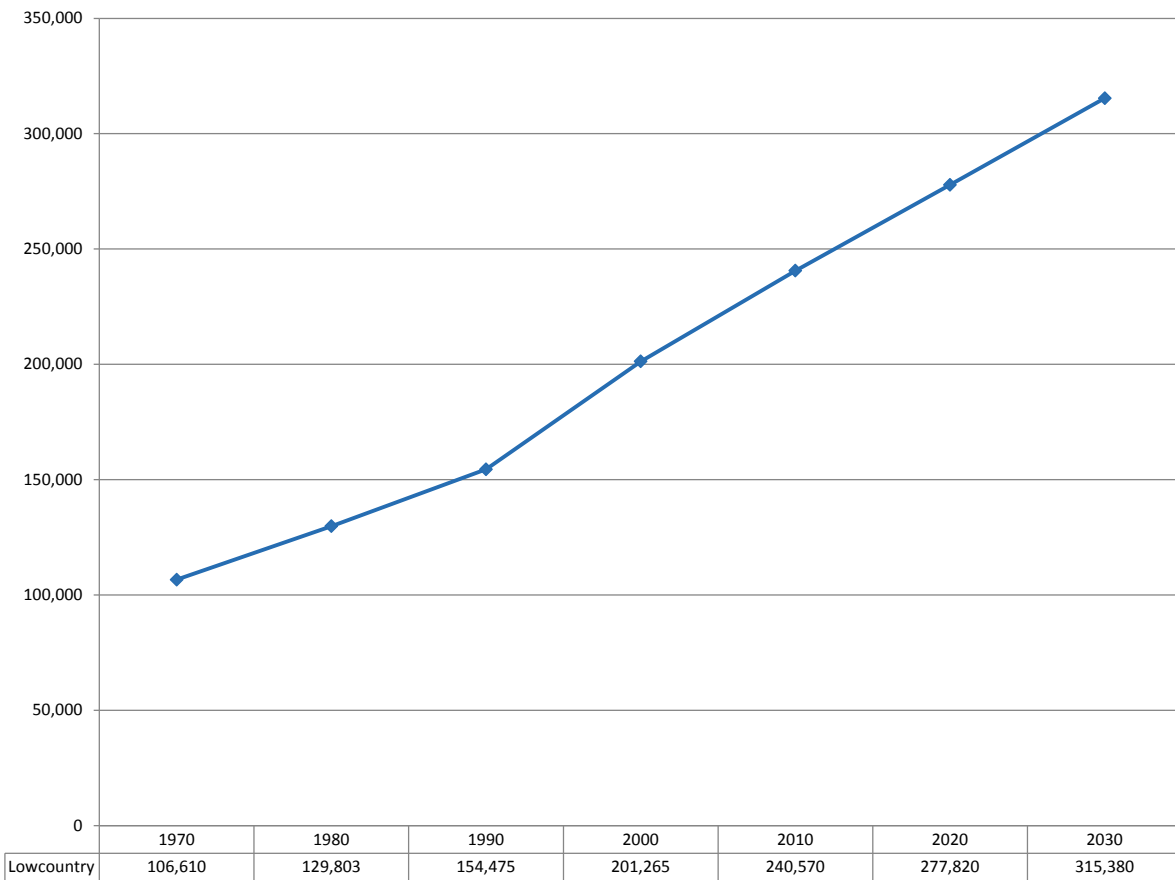
Figure 12: Population by Age

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

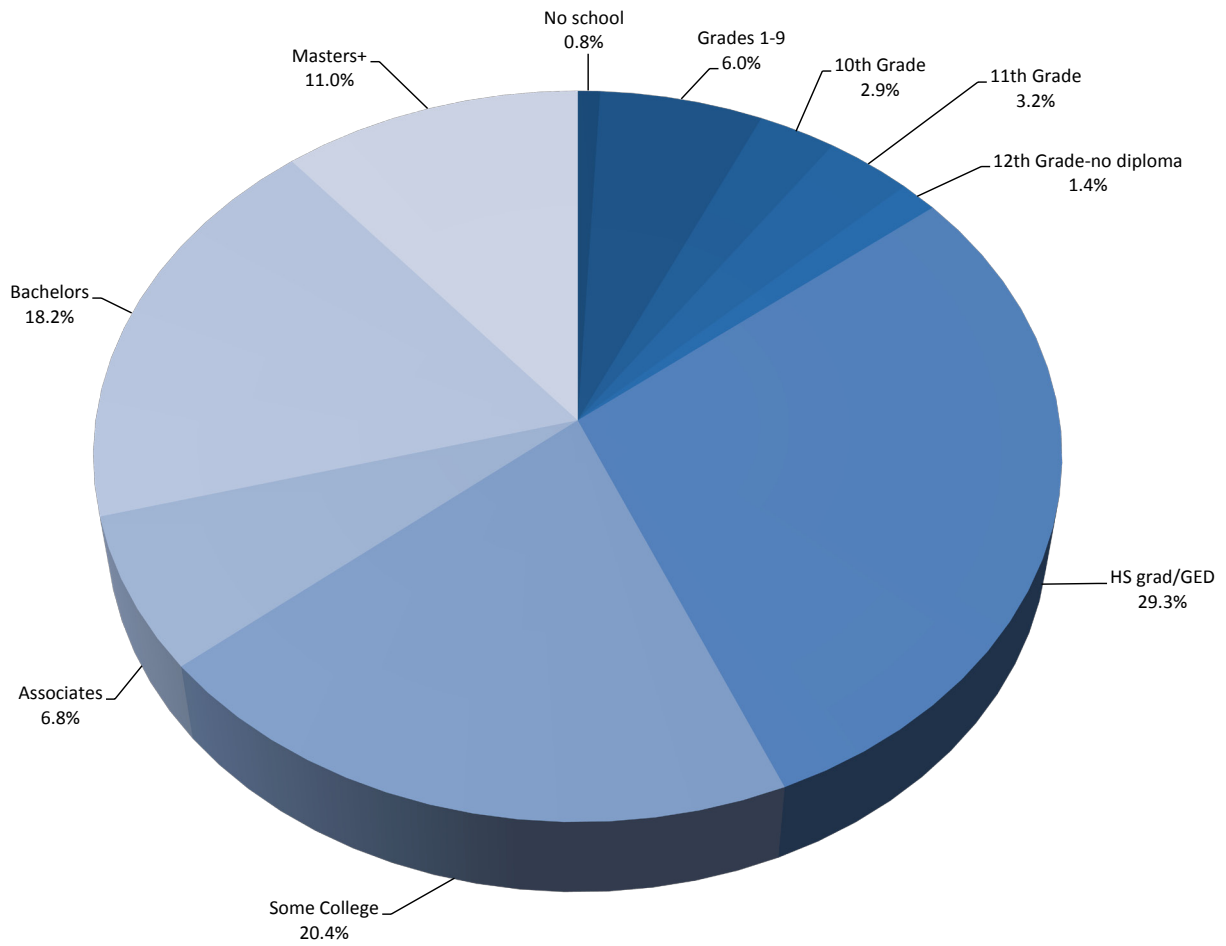
The Lowcountry LWIA is fortunate in that the LWIA has a lower concentration of residents with less than a high school diploma or GED than the state as a whole. It also has a higher percent of residents with a bachelor’s degree or higher than the state does.

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

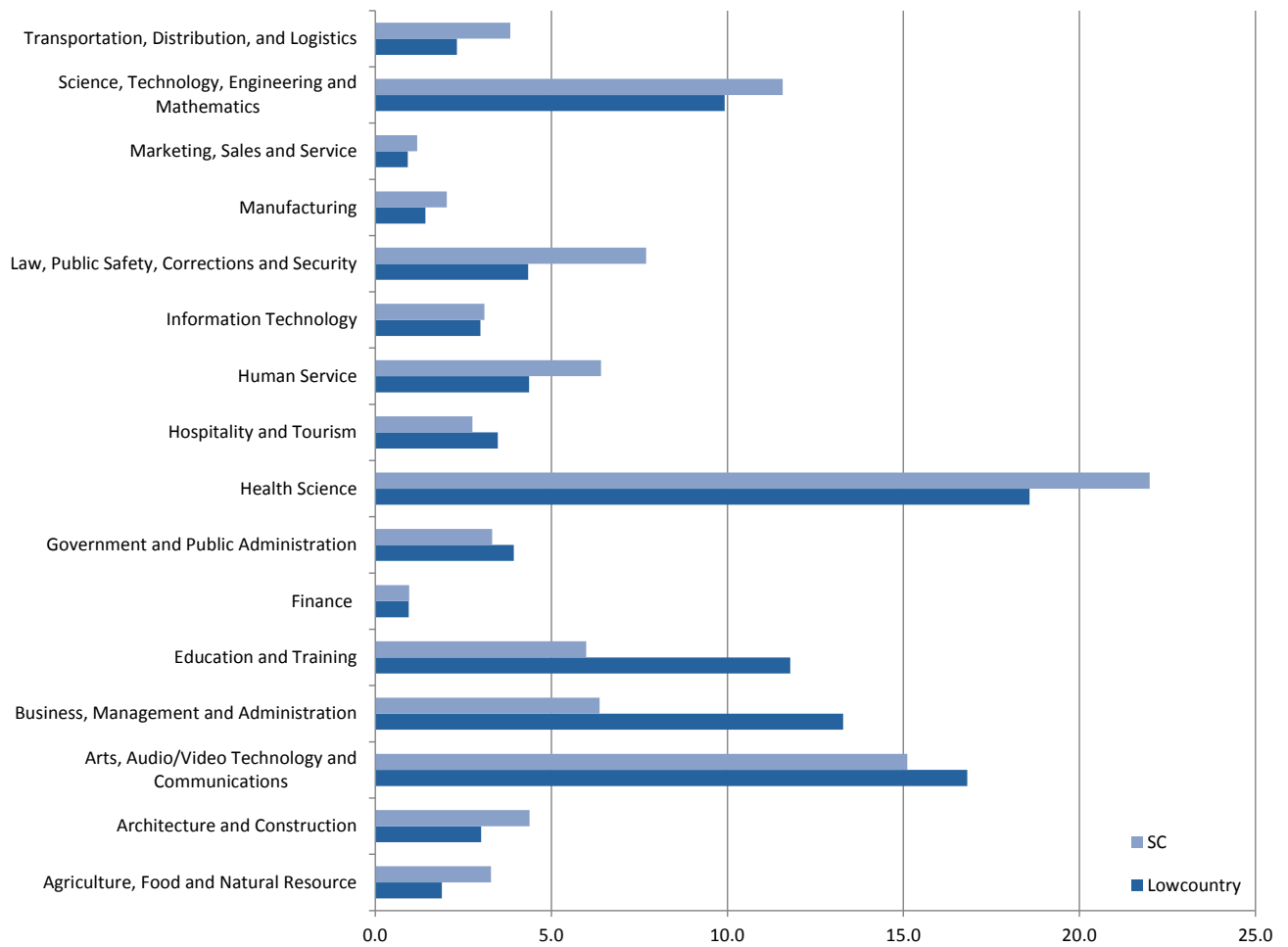


Source: US Census Bureau, ACS, SCDEW

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

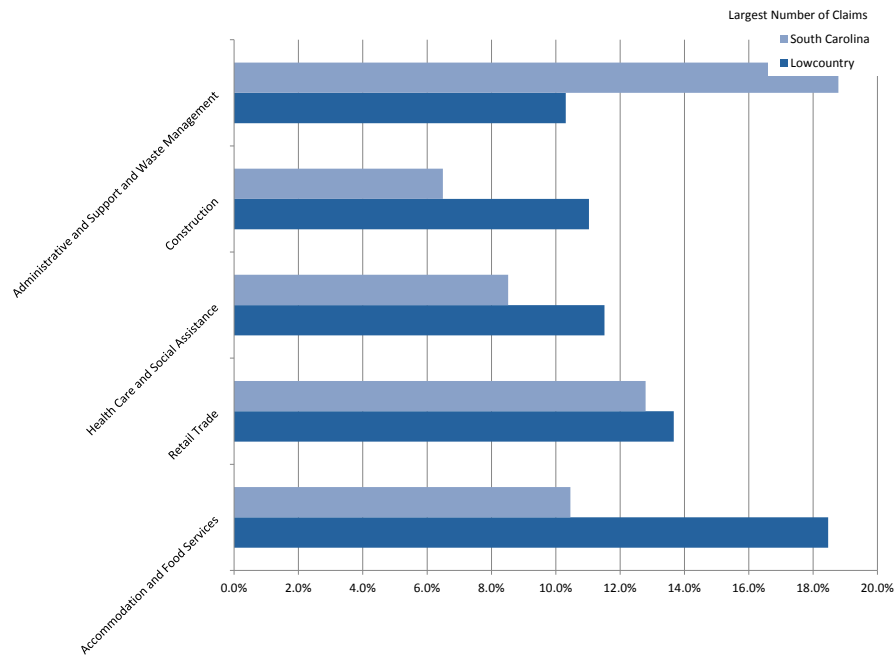
Majors	
Business Administration and Management, General	64
Registered Nursing/Registered Nurse	41
Industrial Electronics Technology/Technician	38
Liberal Arts and Sciences/Liberal Studies	38
Construction Engineering Technology/Technician	31
Heat, Air Cond, Ventilation & Refrig Maint Technology	30
Electrical 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



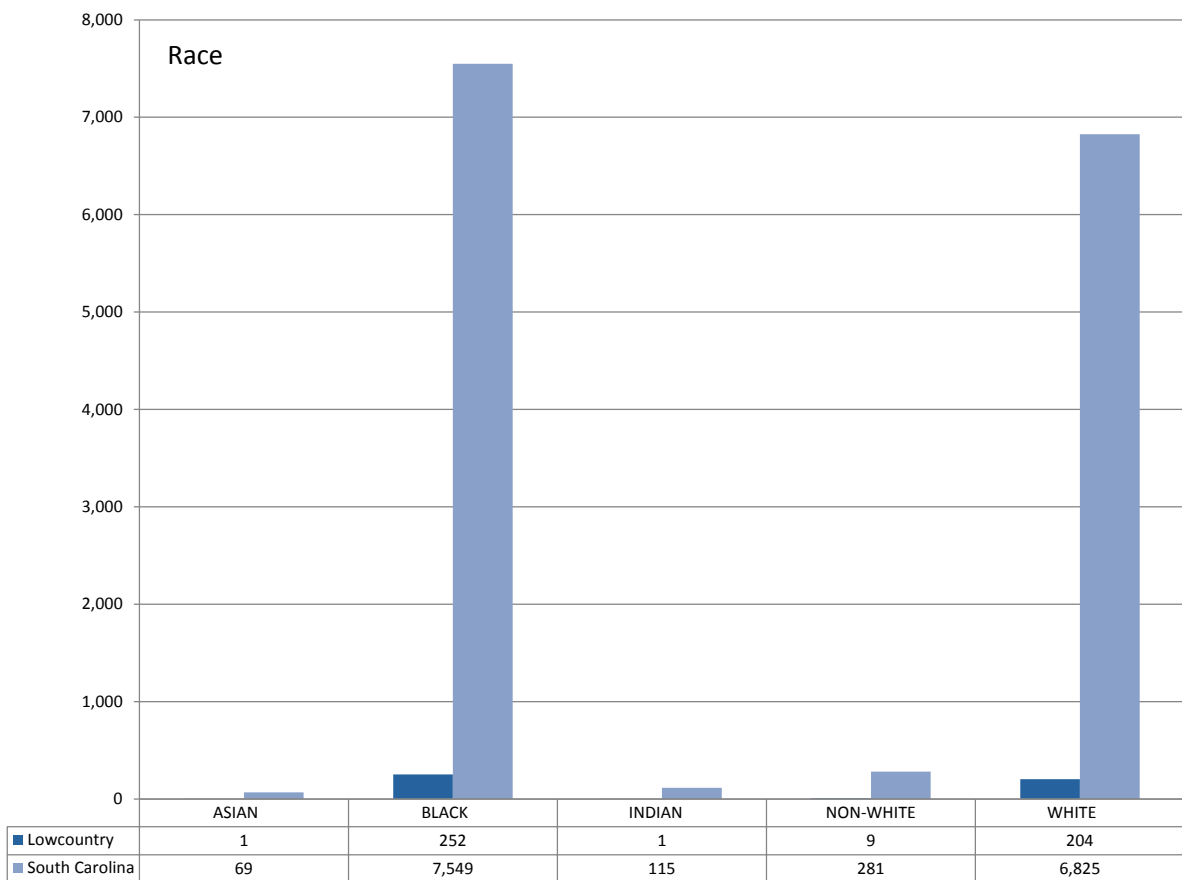
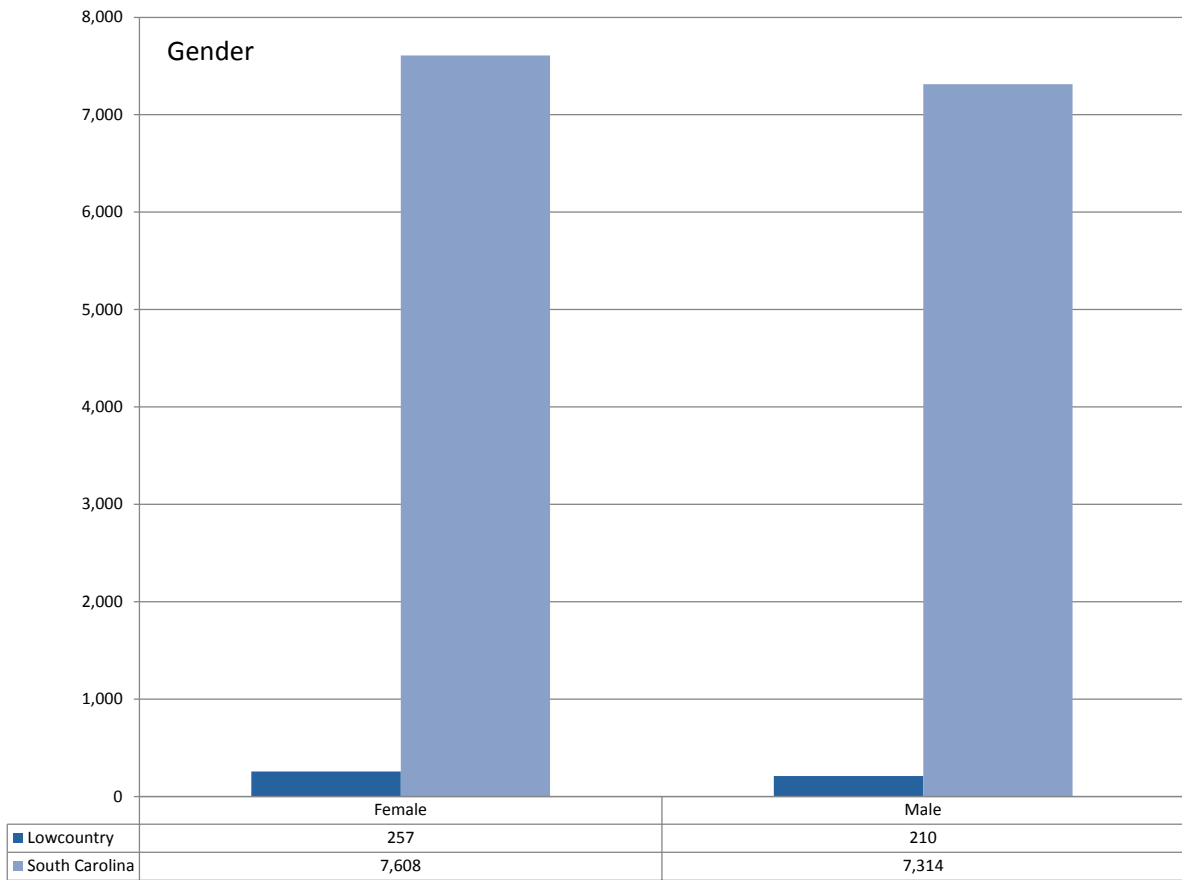
Occupation	Lowcountry	South Carolina
Accommodation and Food Services	77	1,321
Retail Trade	57	1,616
Health Care and Social Assistance	48	1,076
Construction	46	820
Administrative and Support and Waste Management	43	2,373
Transportation and Warehousing	30	414
Professional, Scientific, and Technical Services	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

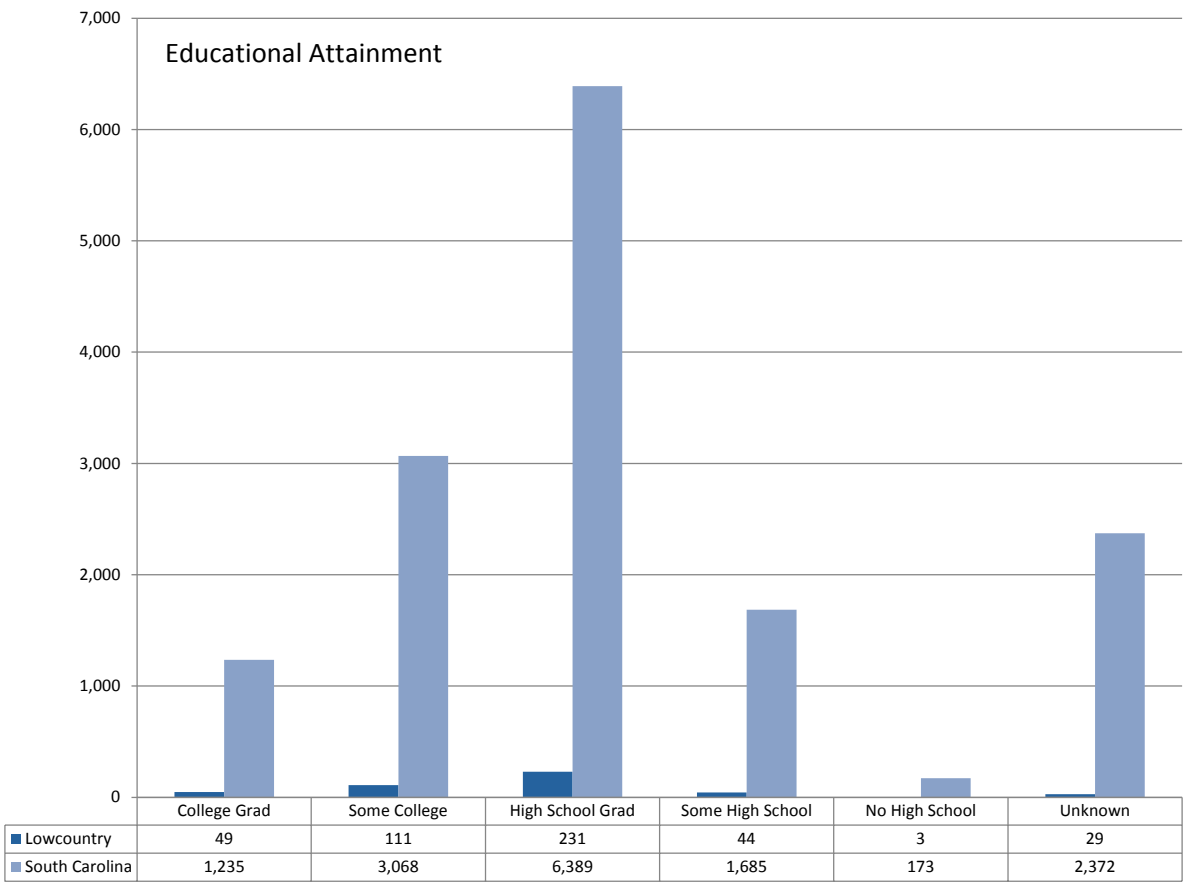
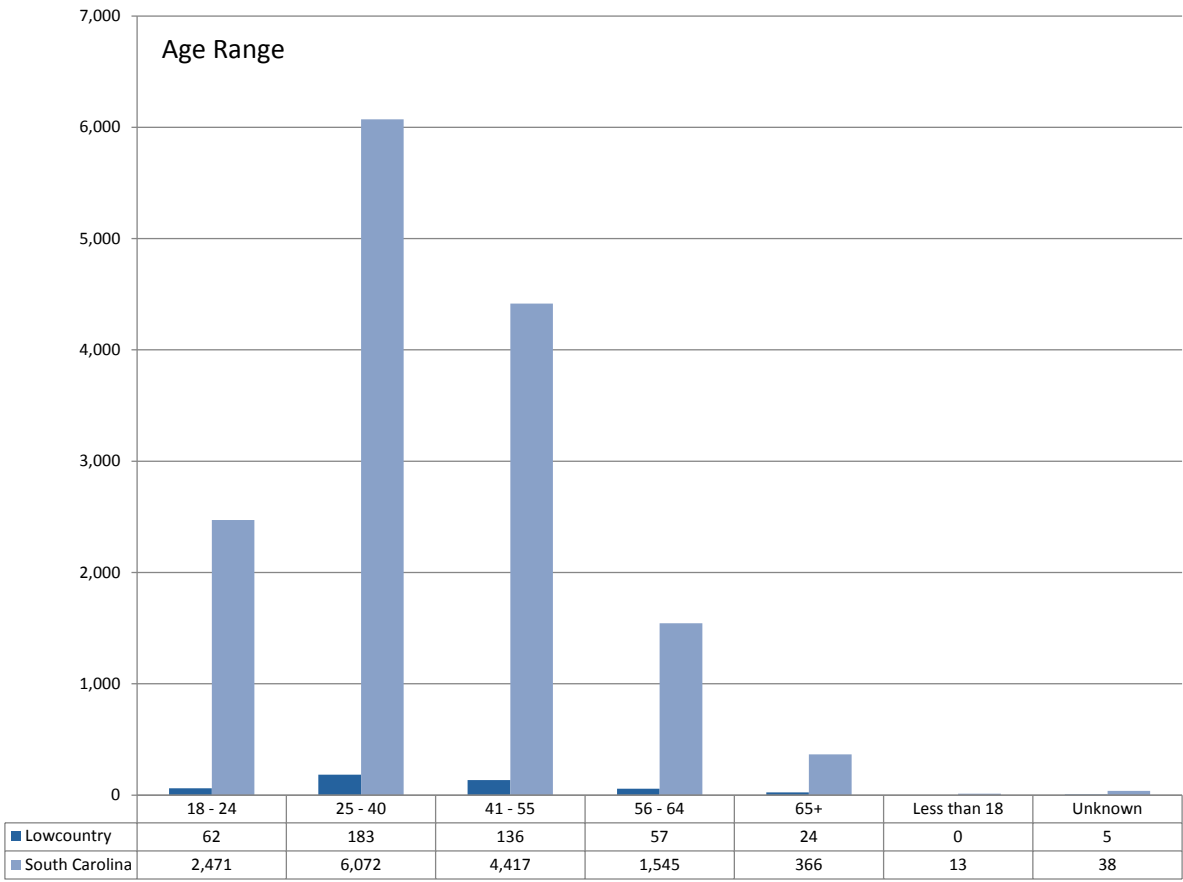
Source: SCDEW

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.

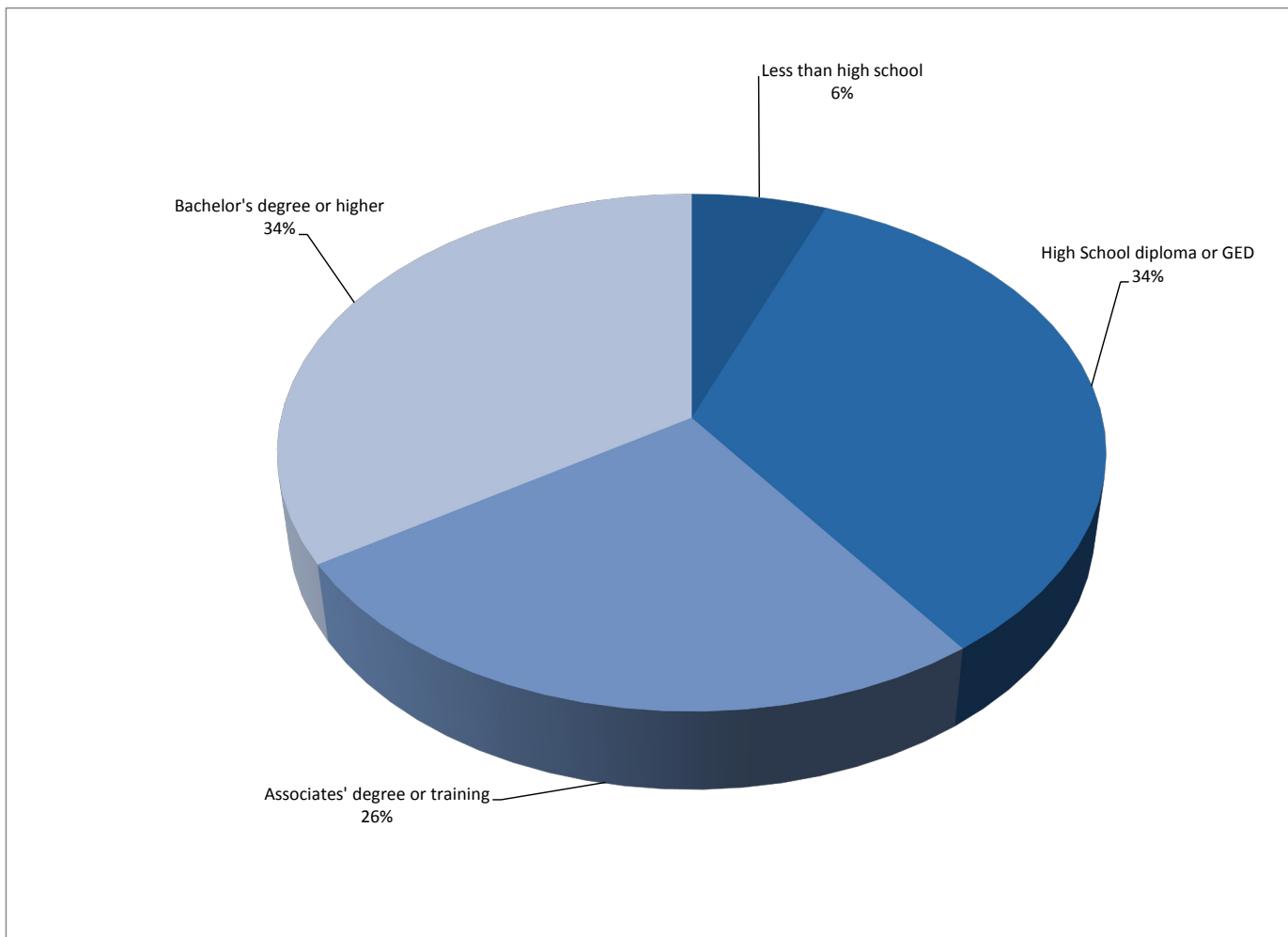
Figure 25: Growing Occupations - 2008-2018

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.