

# 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.

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## 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.

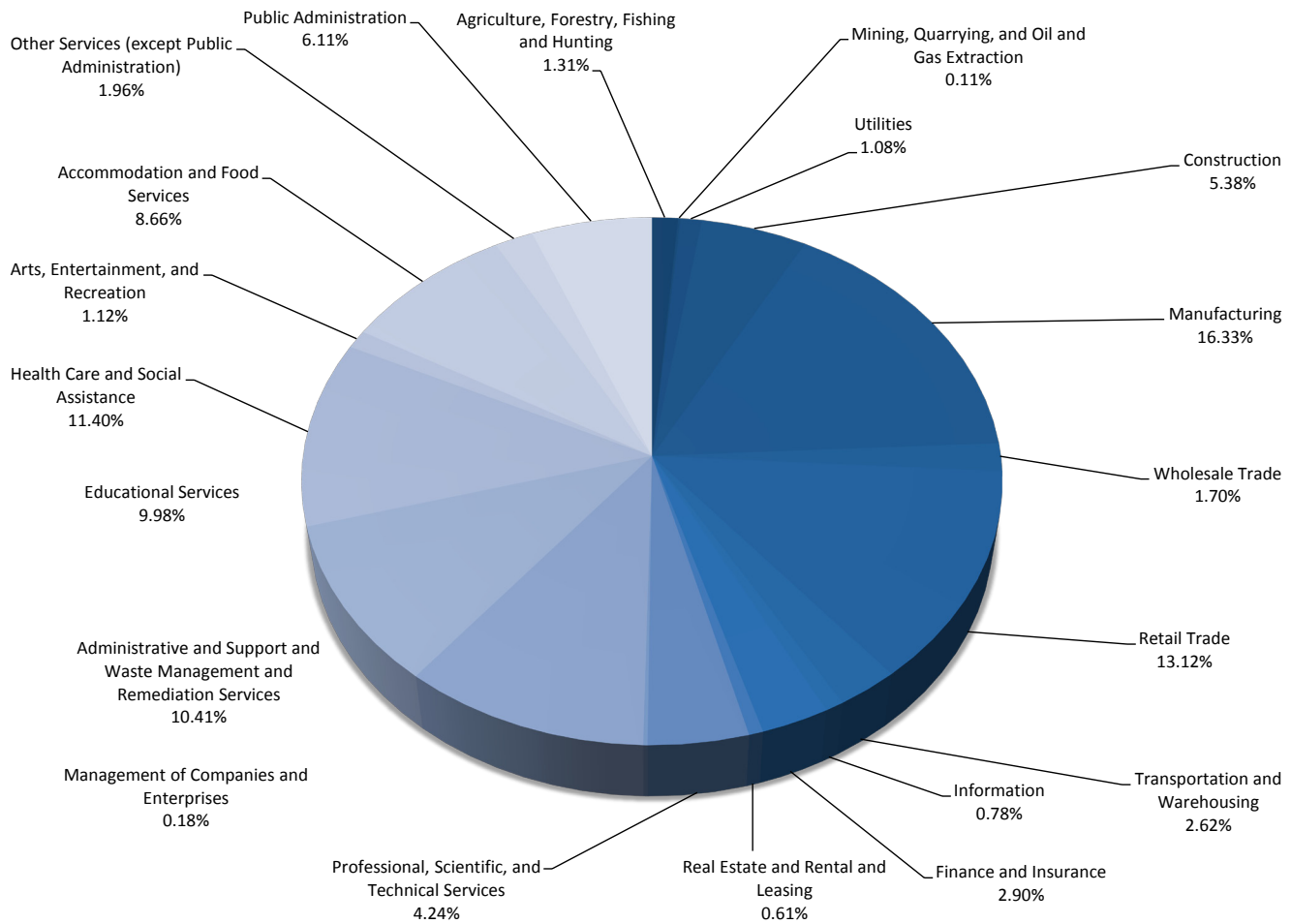




# ECONOMIC DISCUSSION: A CURRENT PICTURE OF THE WORKFORCE

## 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.<sup>1</sup>

## 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

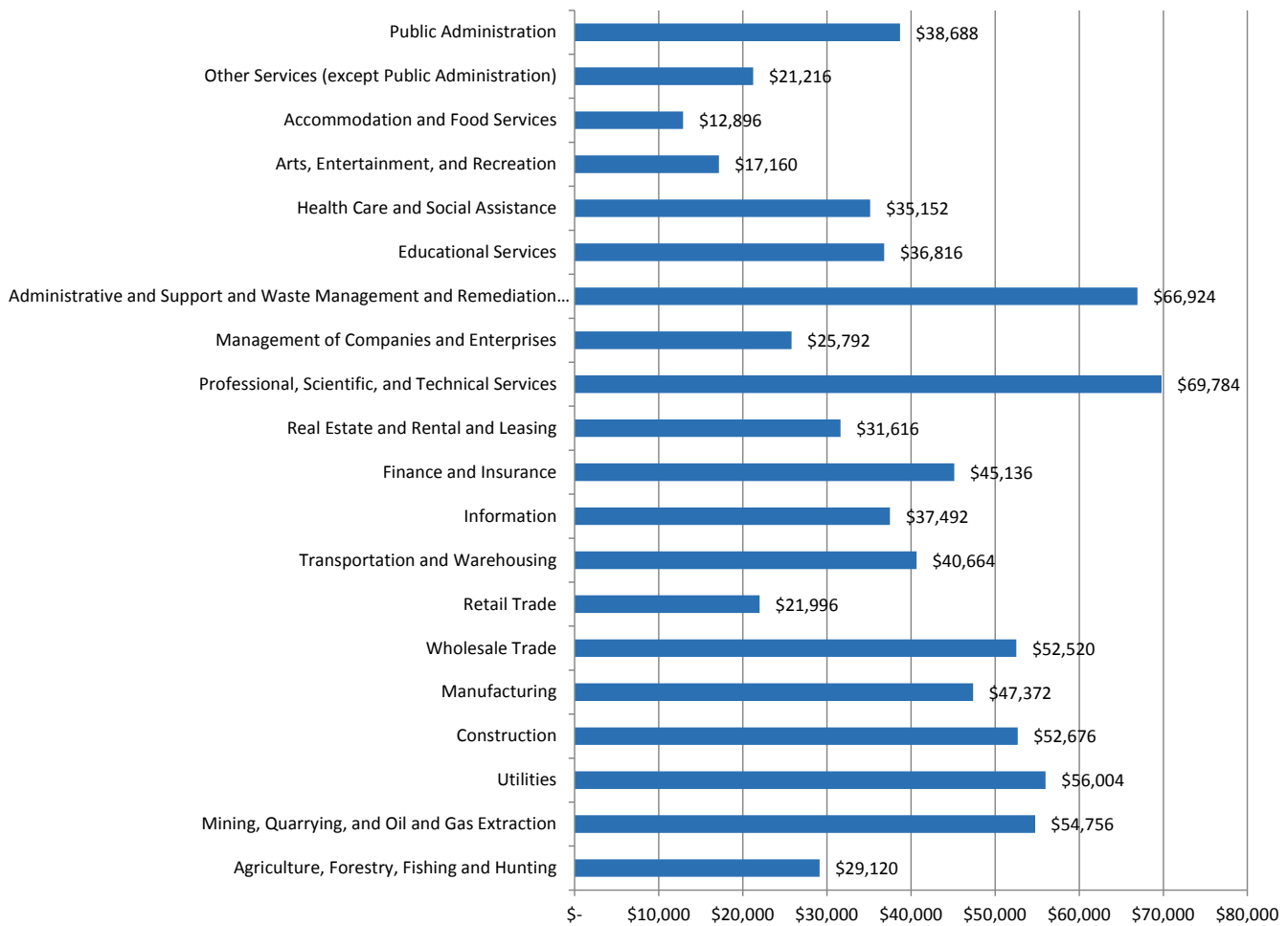
Source: US Department of Labor, Bureau of Labor Statistics - [http://data.bls.gov/location\\_quotient](http://data.bls.gov/location_quotient)

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**

<b>Skillset: LOW</b>
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
<b>Skillset: MIDDLE</b>
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
<b>Skillset: HIGH</b>
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)

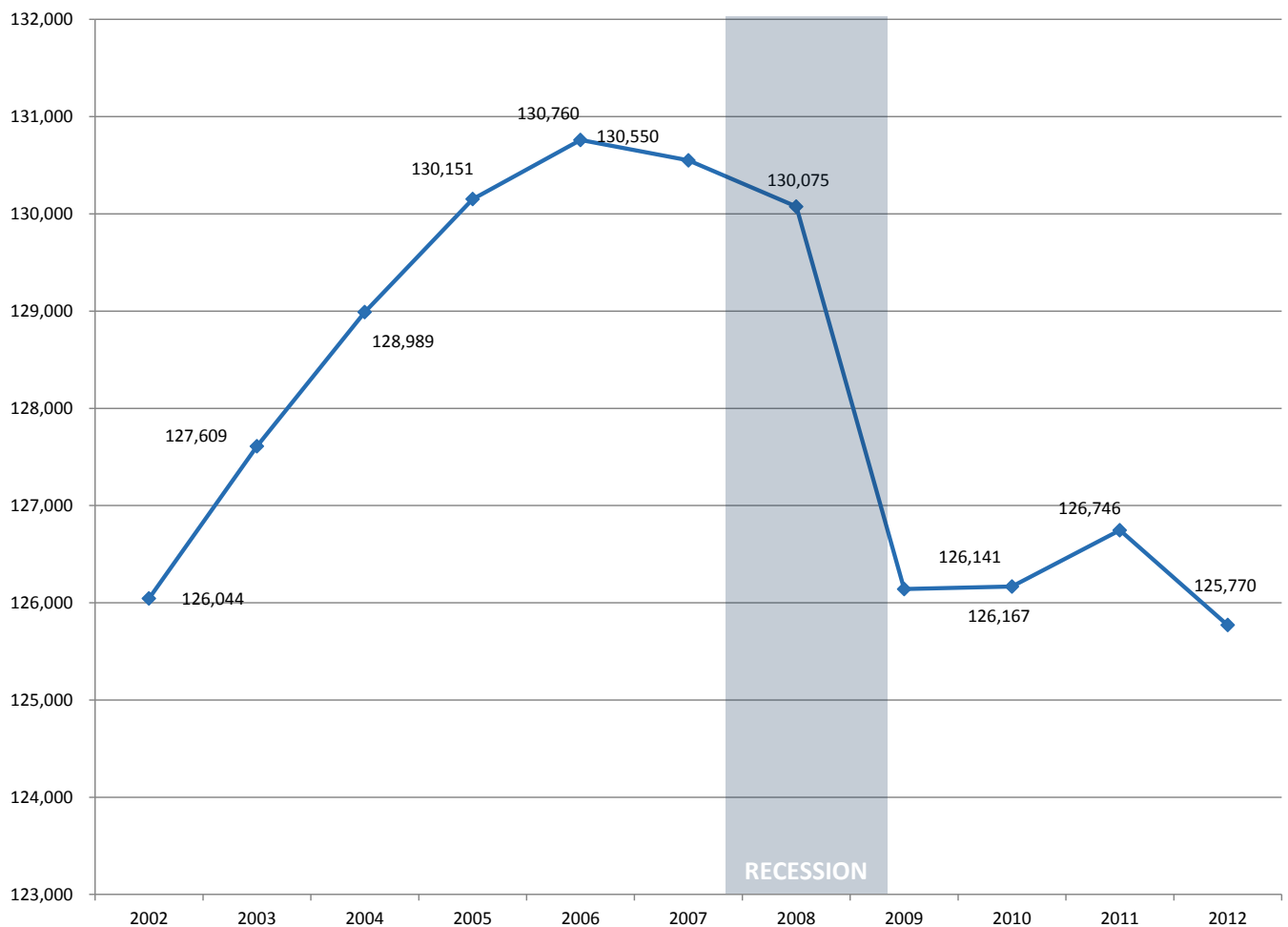
## EMPLOYMENT AND UNEMPLOYMENT

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

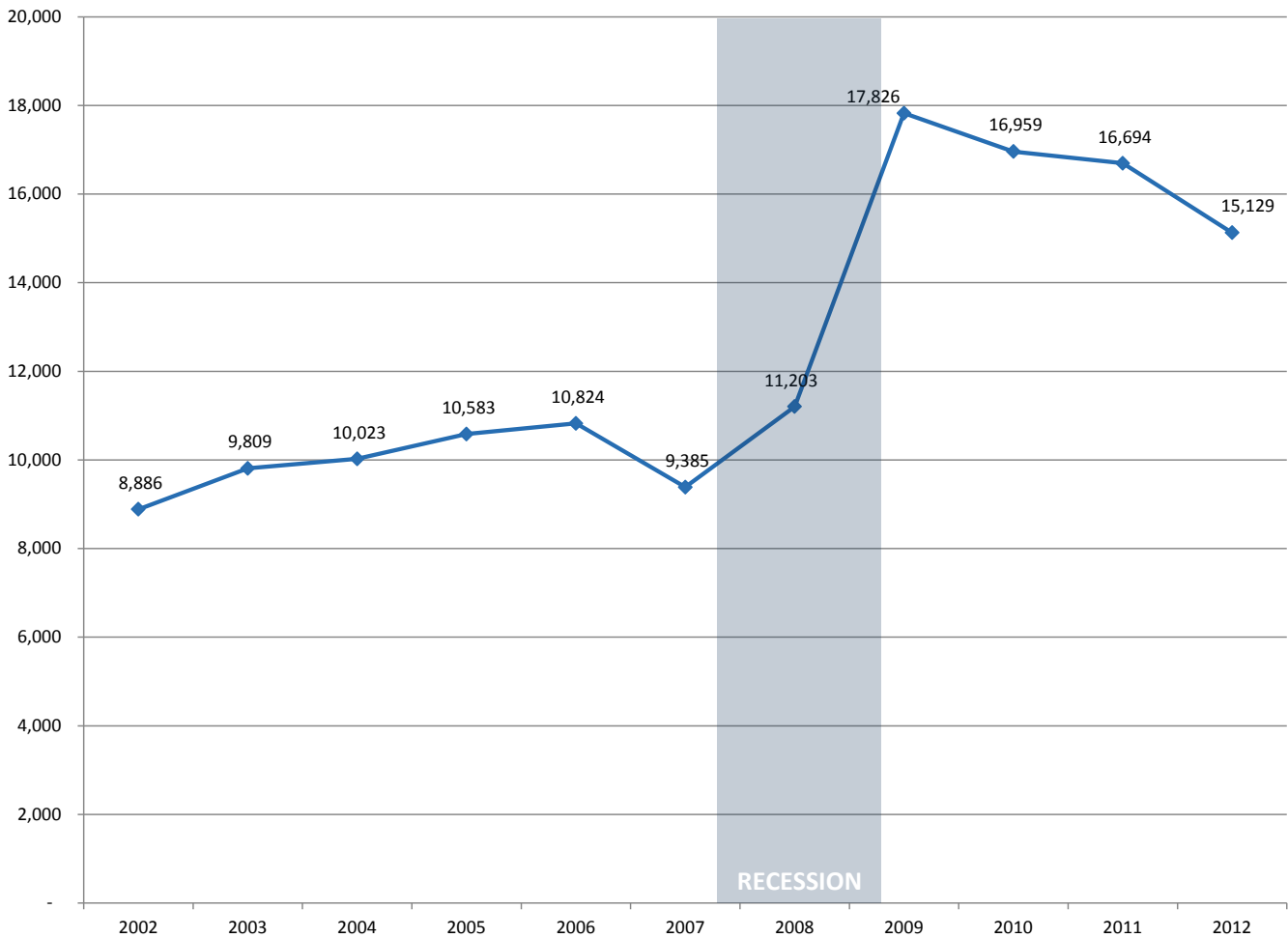
In Figure 6, the recession (officially from December 2007 through June 2009) had a great effect on the labor force. Employment dropped, and unemployment increased by 90 percent.

**Figure 6: Employment - 2002-2012**



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

**Figure 7: Unemployment - 2002-2012**

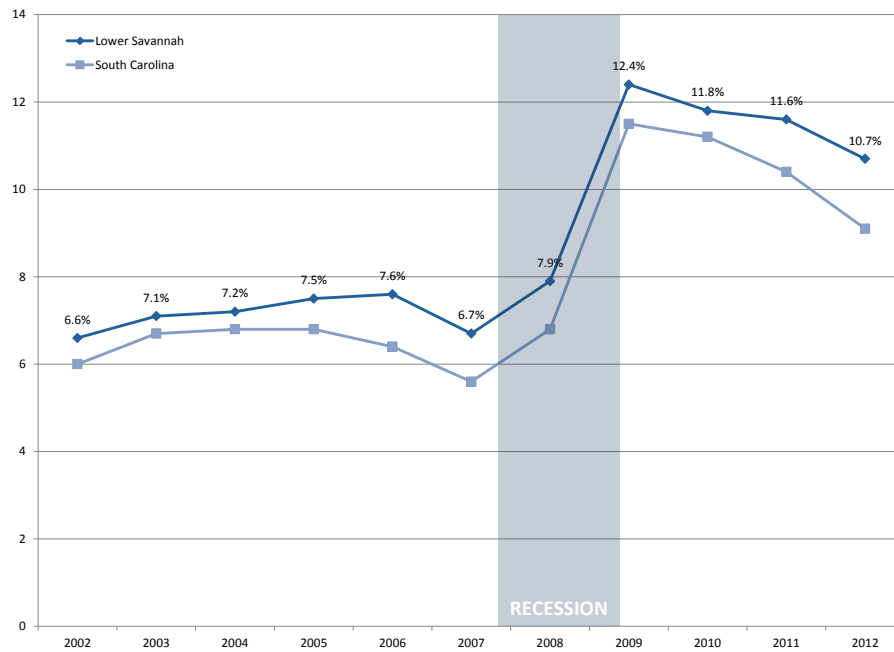


Source: BLS, SCDEW, LAUS

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.

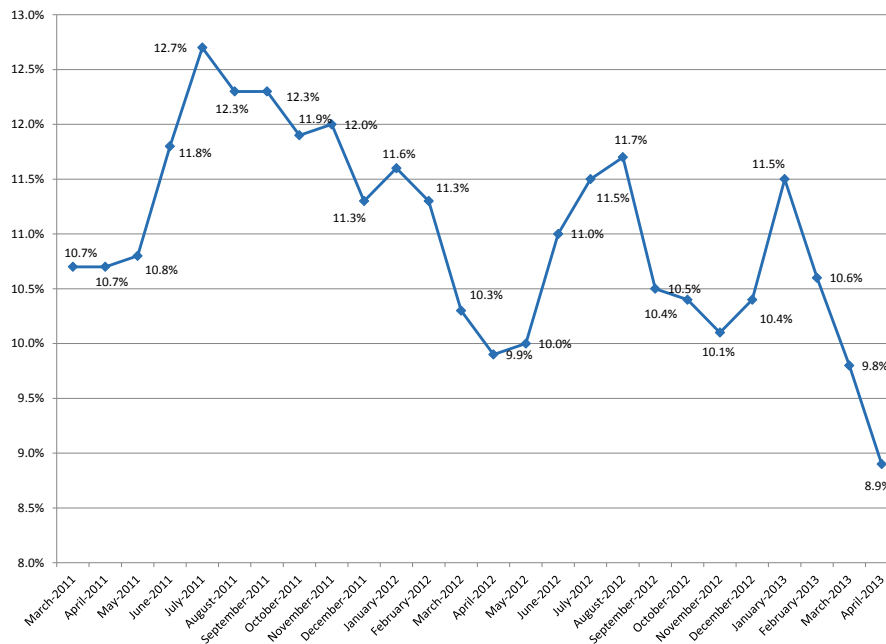
**Figure 8: Annual Unemployment - 2002-2012**



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

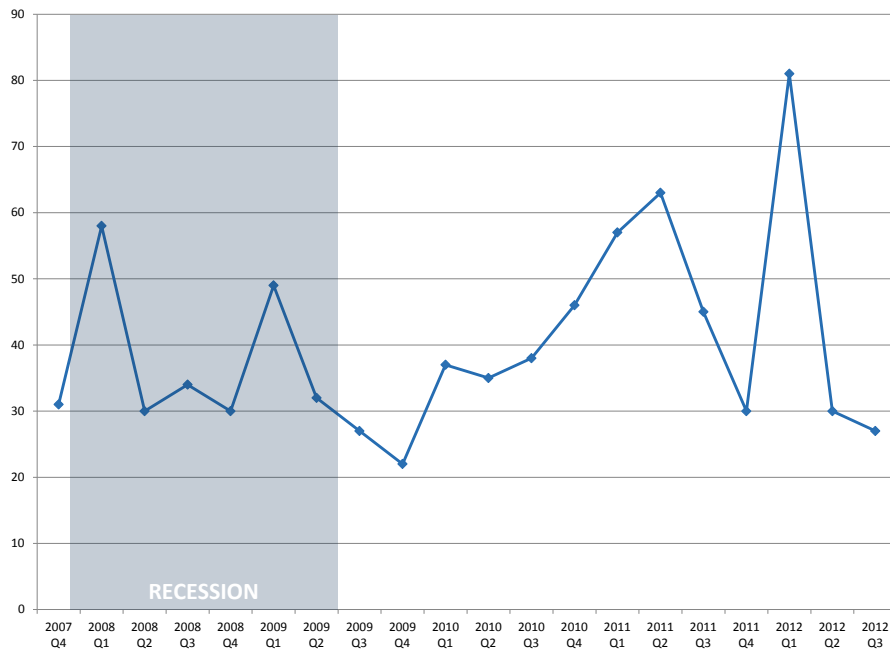
**NEW STARTUP FIRMS**

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.

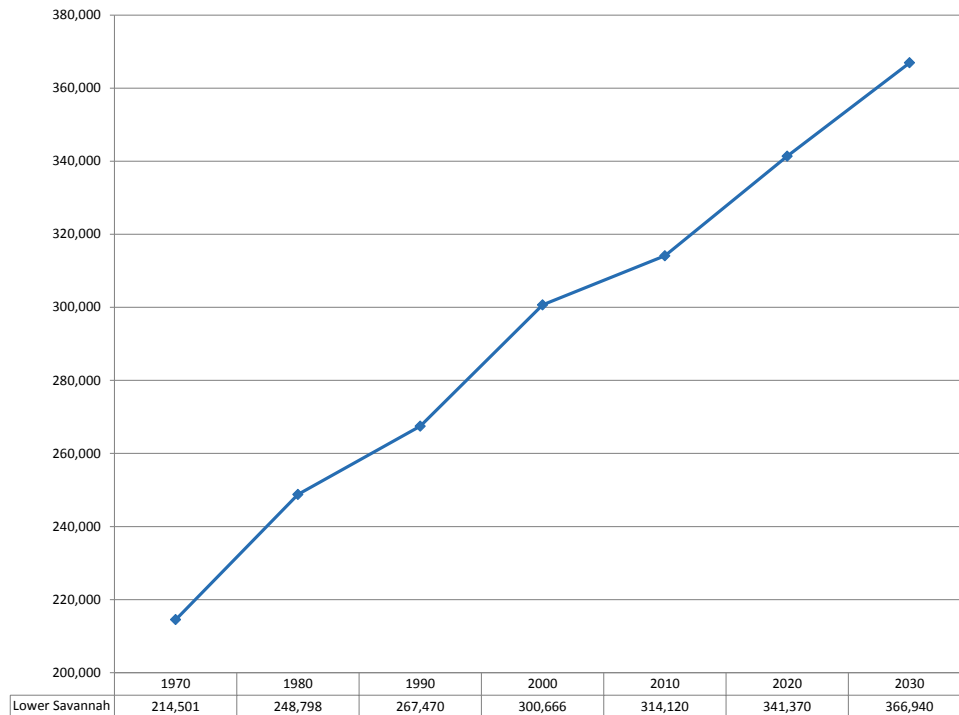
**Figure 12: Population by Age**

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

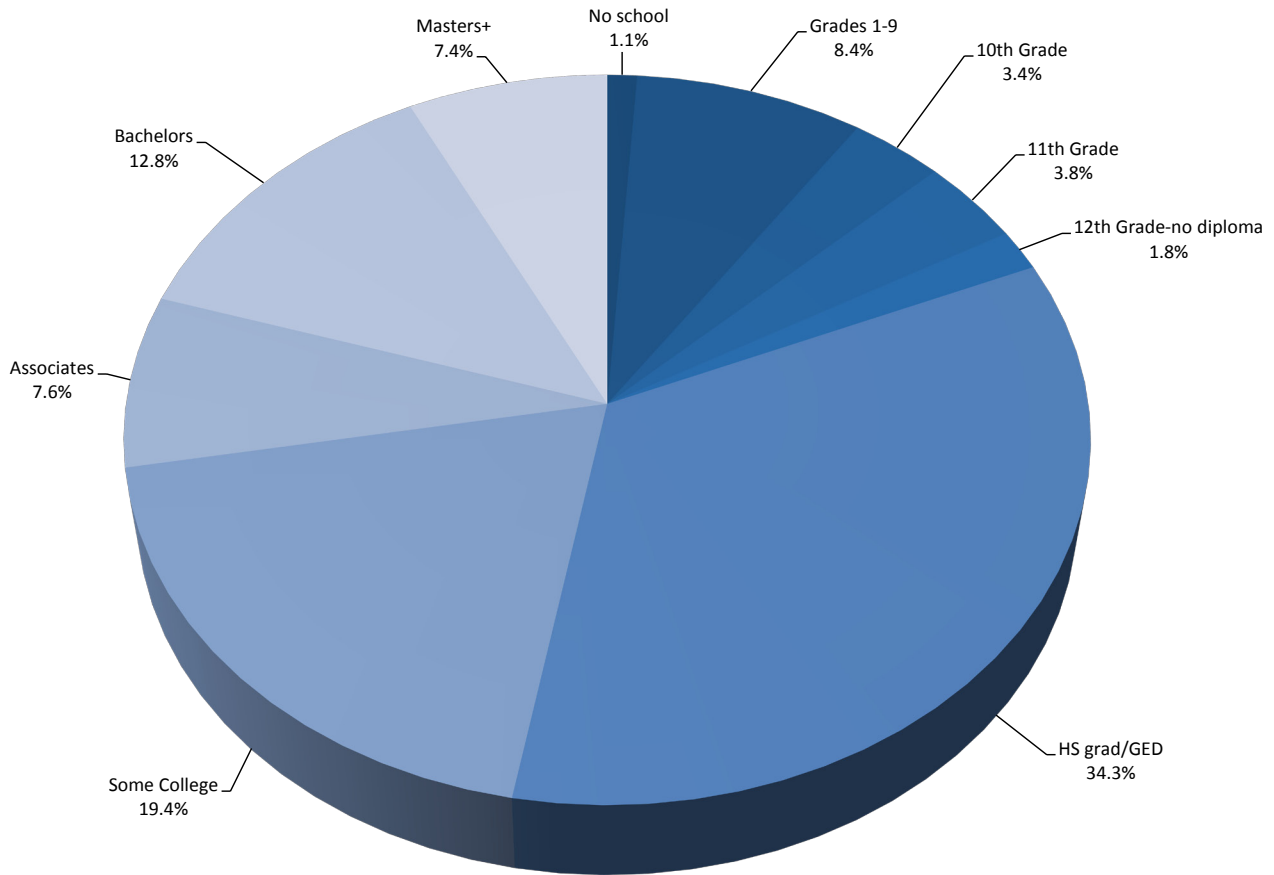
The Lower Savannah LWIA area has a lower percent of residents with higher-level degrees than the state as a whole. The Lower Savannah LWIA has a more than 3 percent higher concentration of residents with a high school diploma or GED than the state. However, the Lower Savannah LWIA has a higher percent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

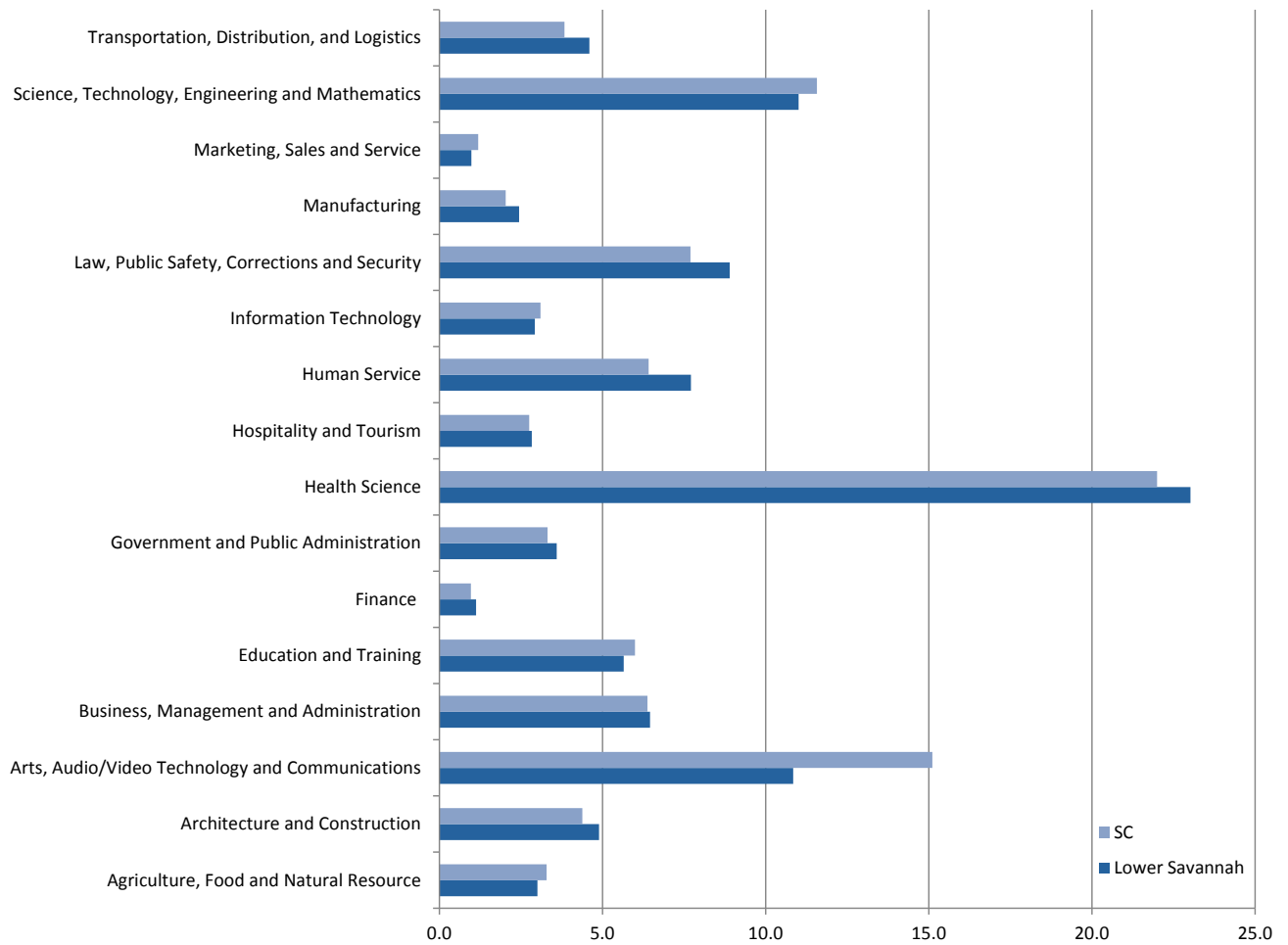


Source: US Census Bureau, ACS, SCDEW

### **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

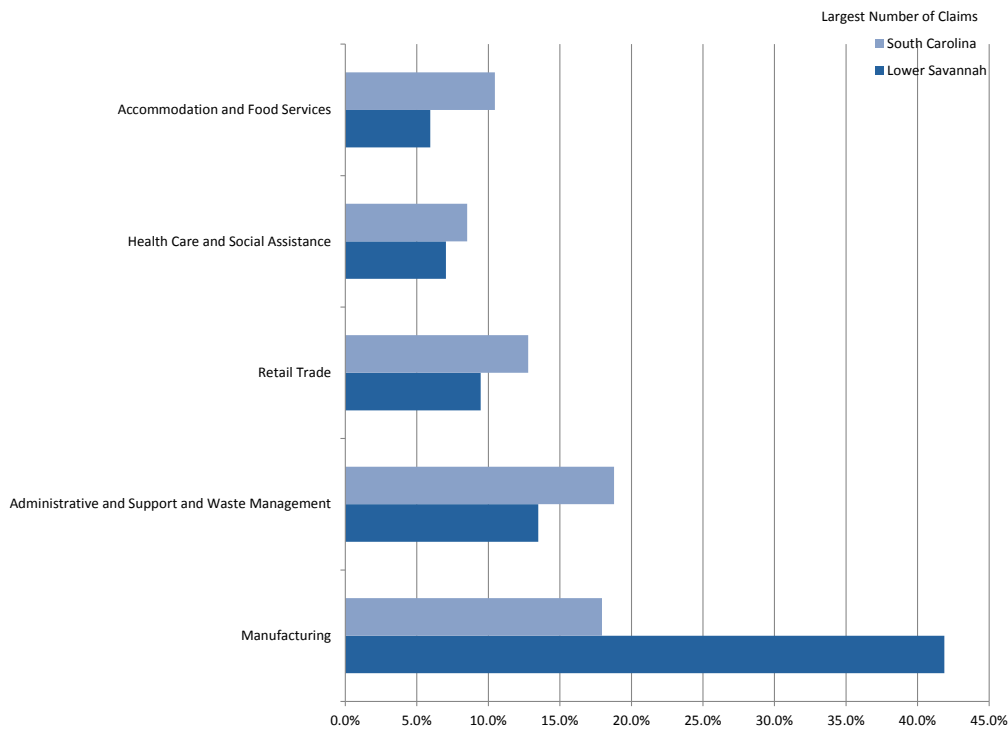
Source: SC Commission on Higher Education, [http://www.che.sc.gov/New\\_Web/Data&Pubs.htm](http://www.che.sc.gov/New_Web/Data&Pubs.htm)

### *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**



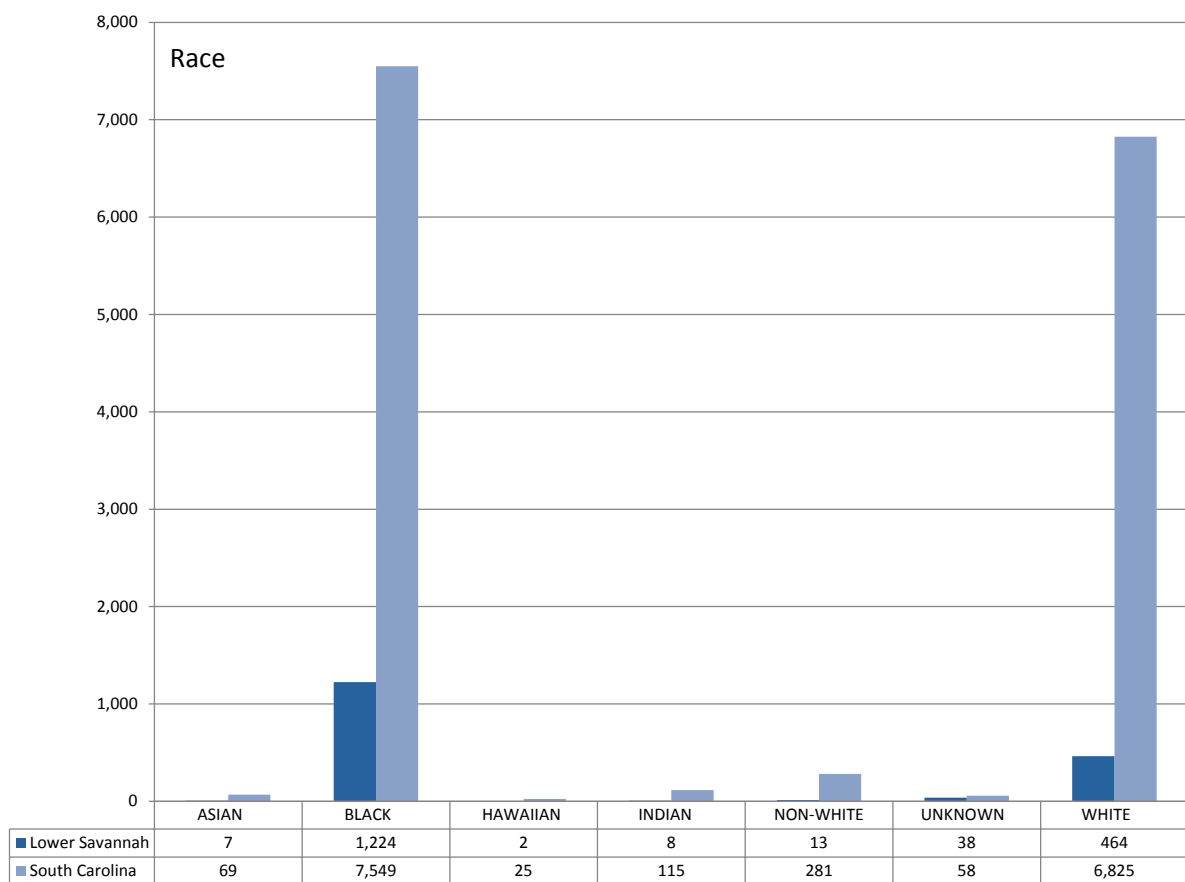
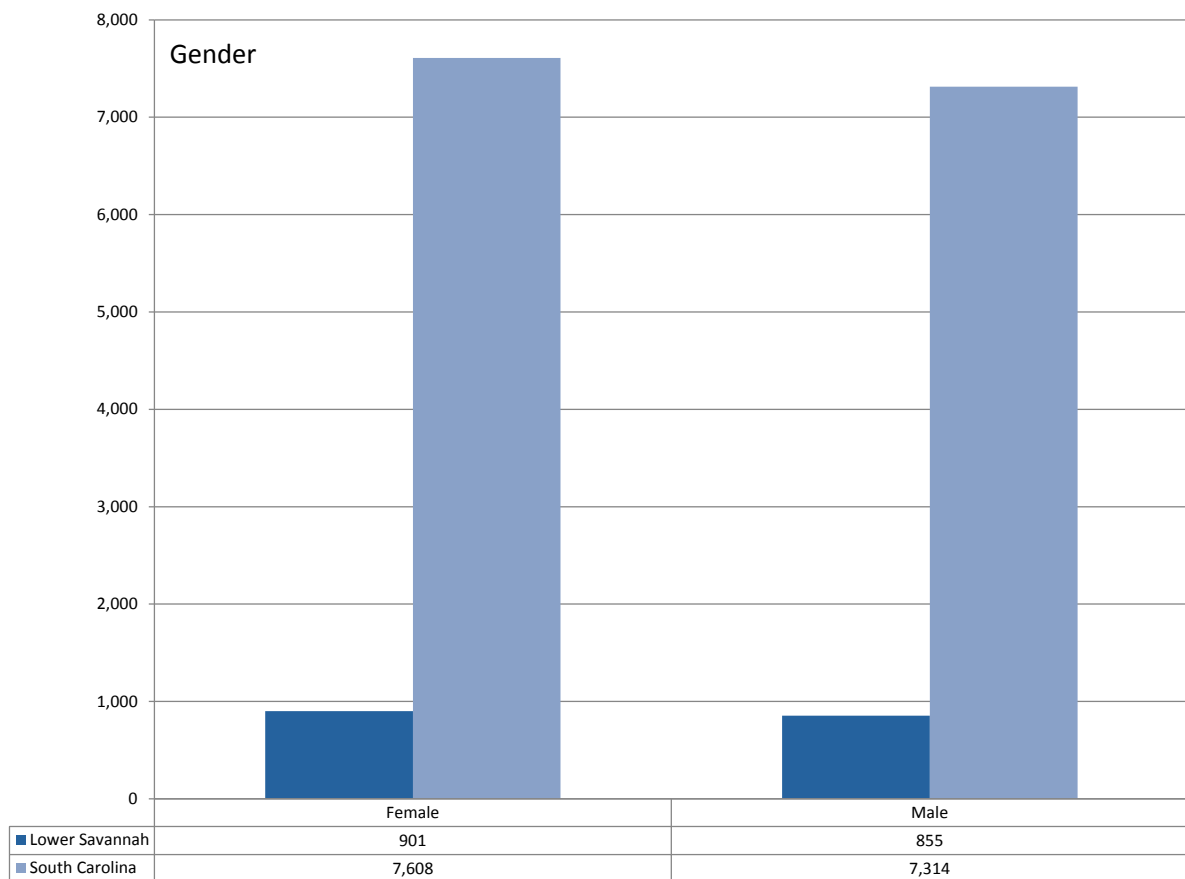
Occupation	Lower Savannah	South Carolina
Manufacturing	500	2,267
Administrative and Support and Waste Management	161	2,373
Retail Trade	113	1,616
Health Care and Social Assistance	84	1,076
Accommodation and Food Services	71	1,321
Construction	58	820
Professional, Scientific, and Technical Services	53	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

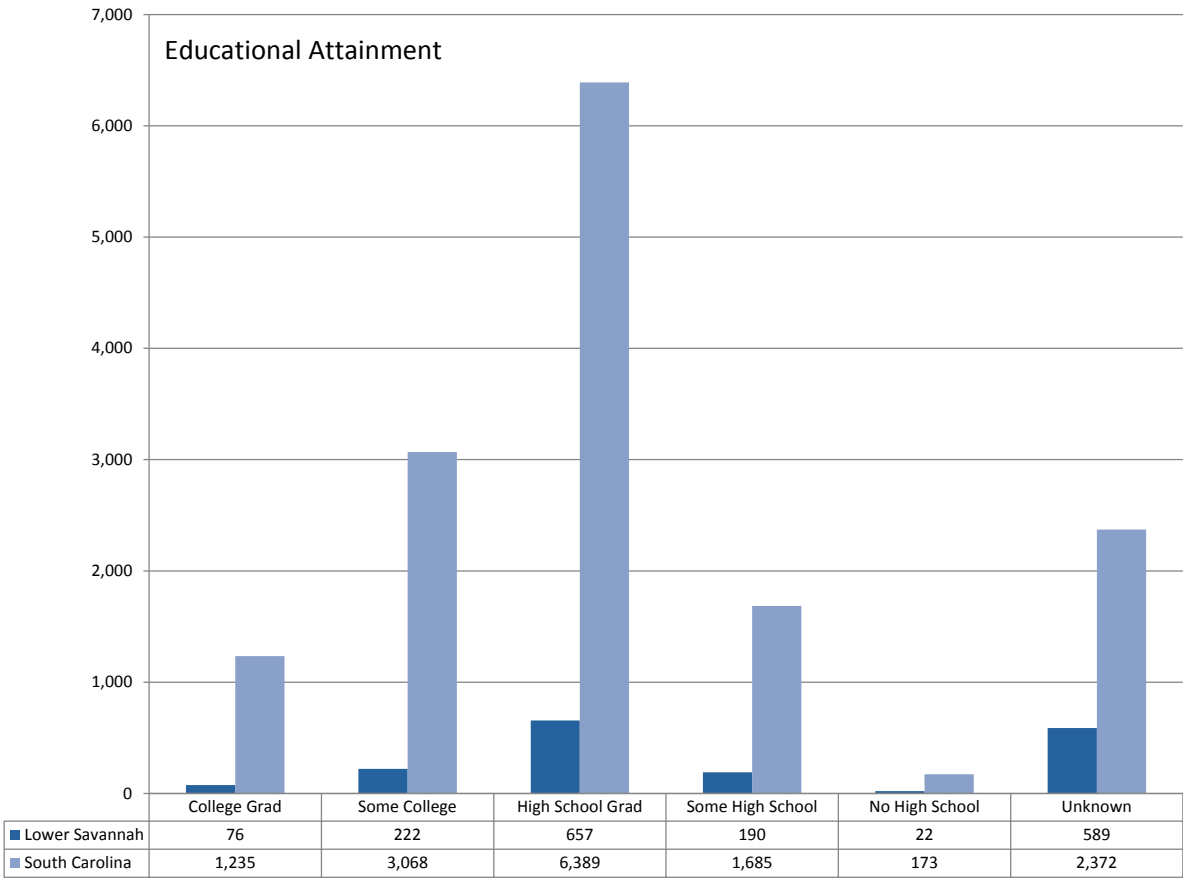
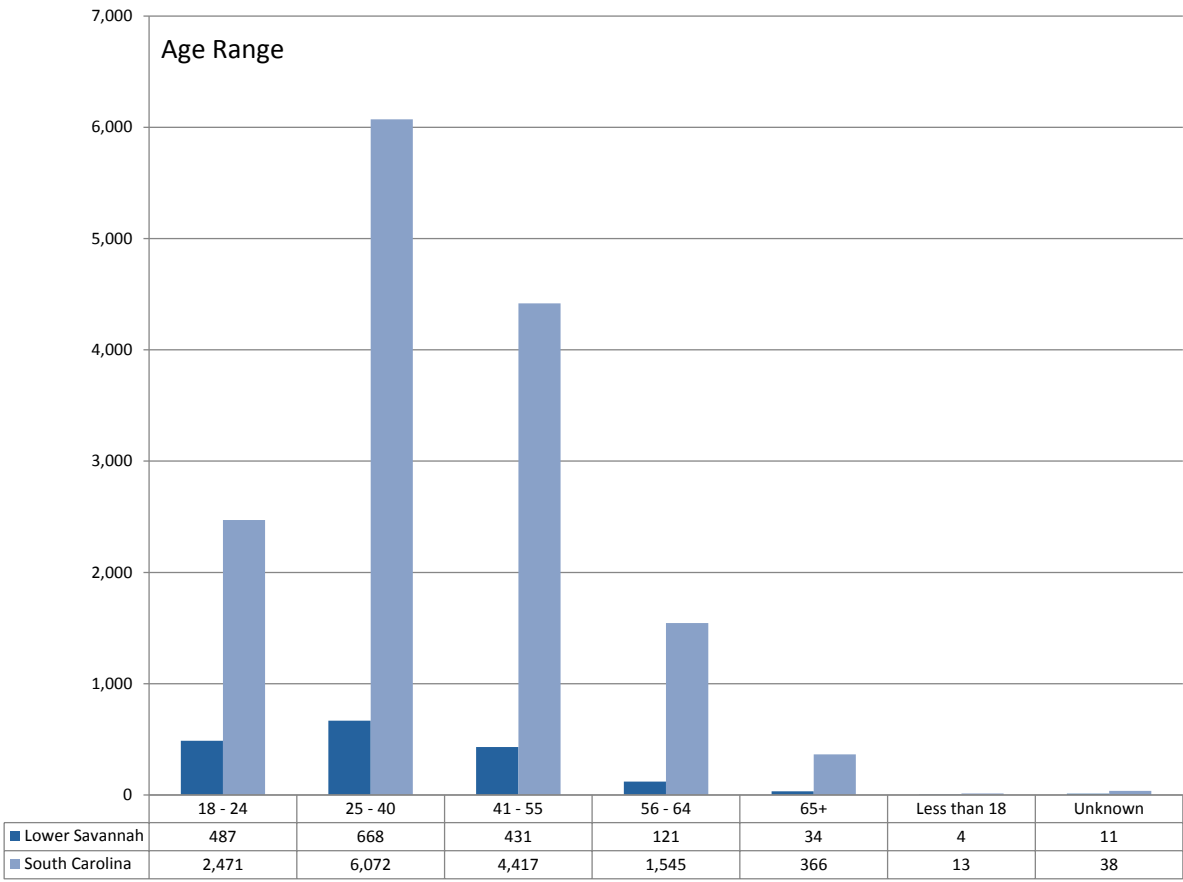
Source: SCDEW

### 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.

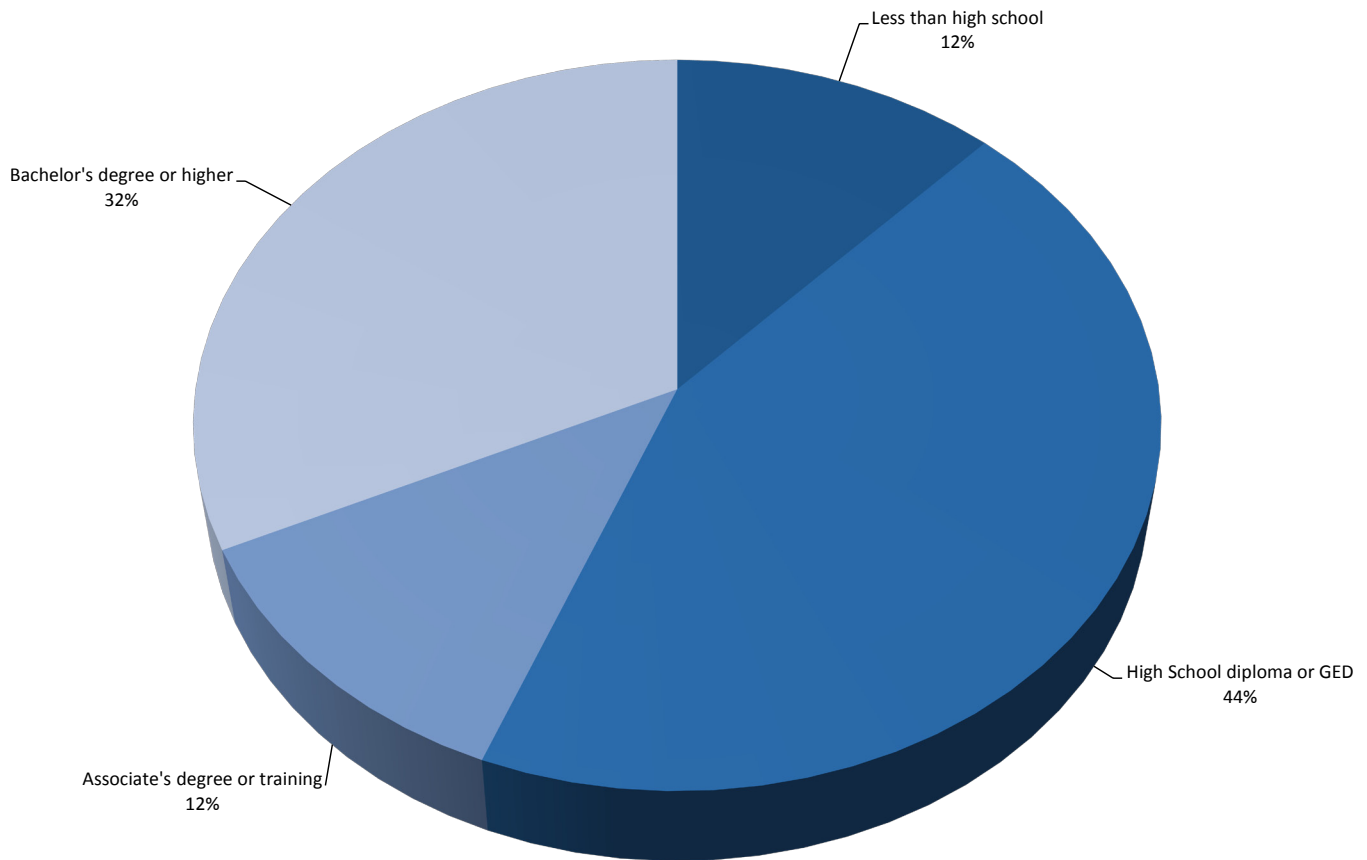
**Figure 25: Growing Occupations - 2008-2018**

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.