

# 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.

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## 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.

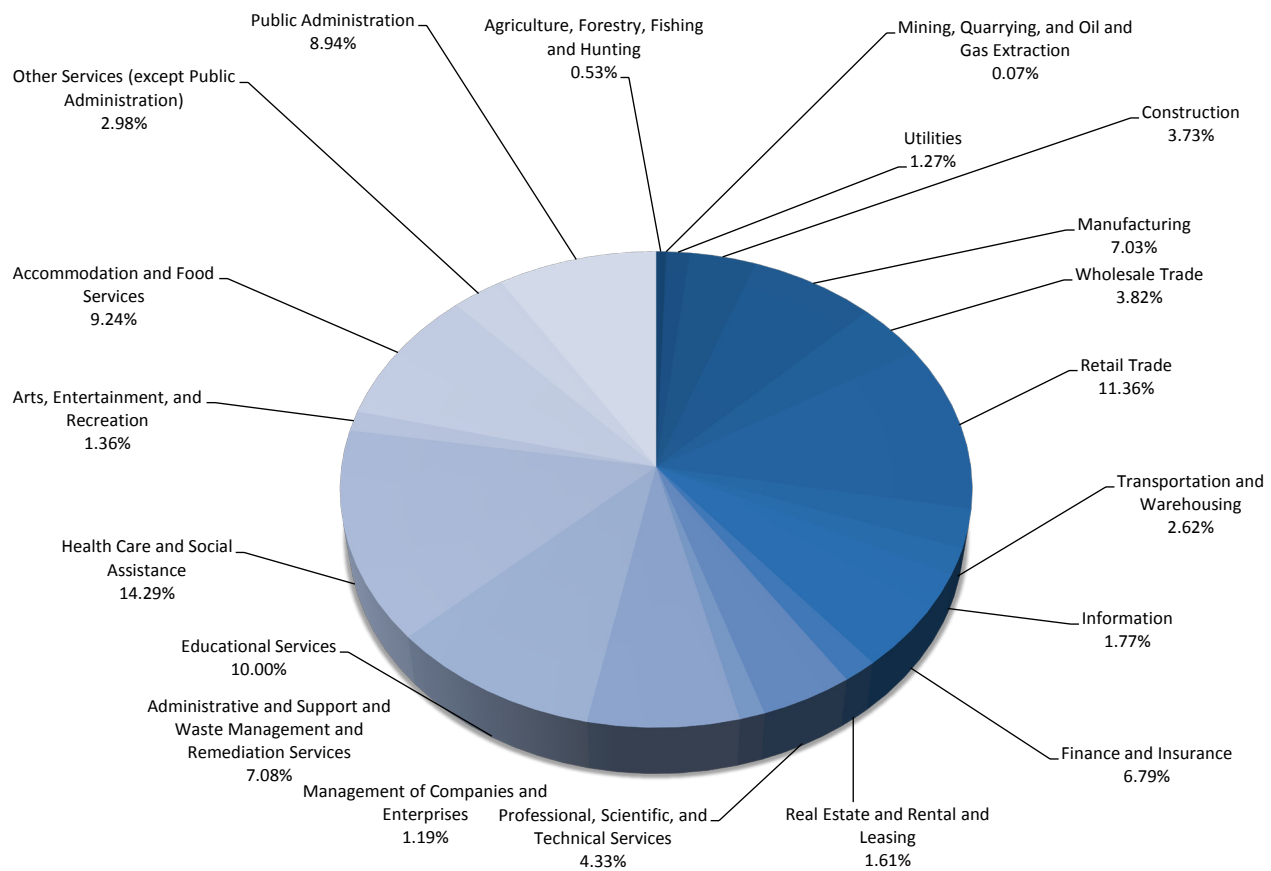




# ECONOMIC DISCUSSION: A CURRENT PICTURE OF THE WORKFORCE

## 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.<sup>1</sup> 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.

1 US Bureau of Economic Analysis

**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](http://data.bls.gov/location_quotient)

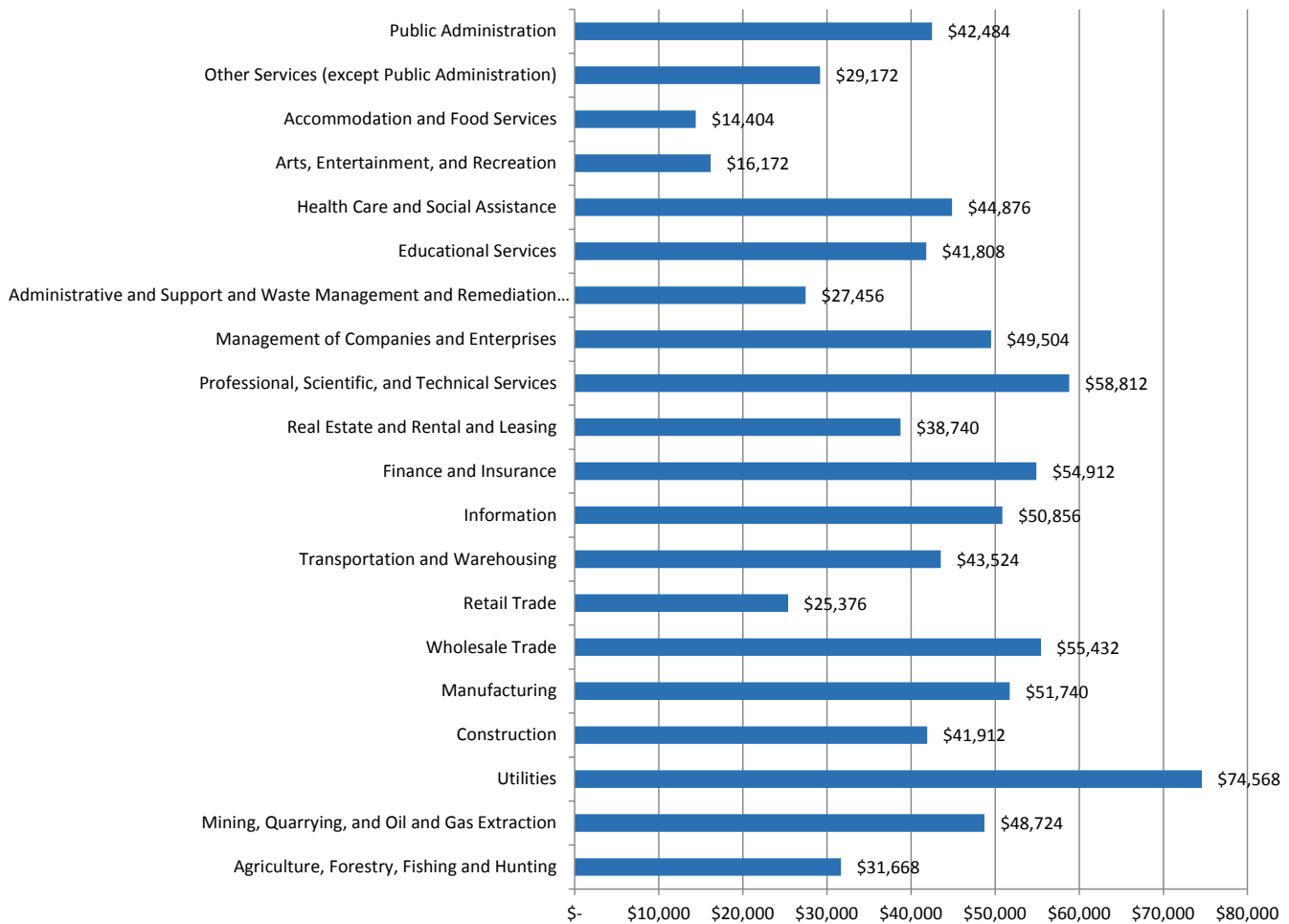
Manufacturing industries top the most concentrated sectors in this area with location quotients from 2.1 to 16.9. These industries, located throughout the area, include Paper, Plastics and Rubber Products, and Nonmetallic Mineral Products. Other notable sectors in the Midlands LWIA are Nondurable Goods 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**

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

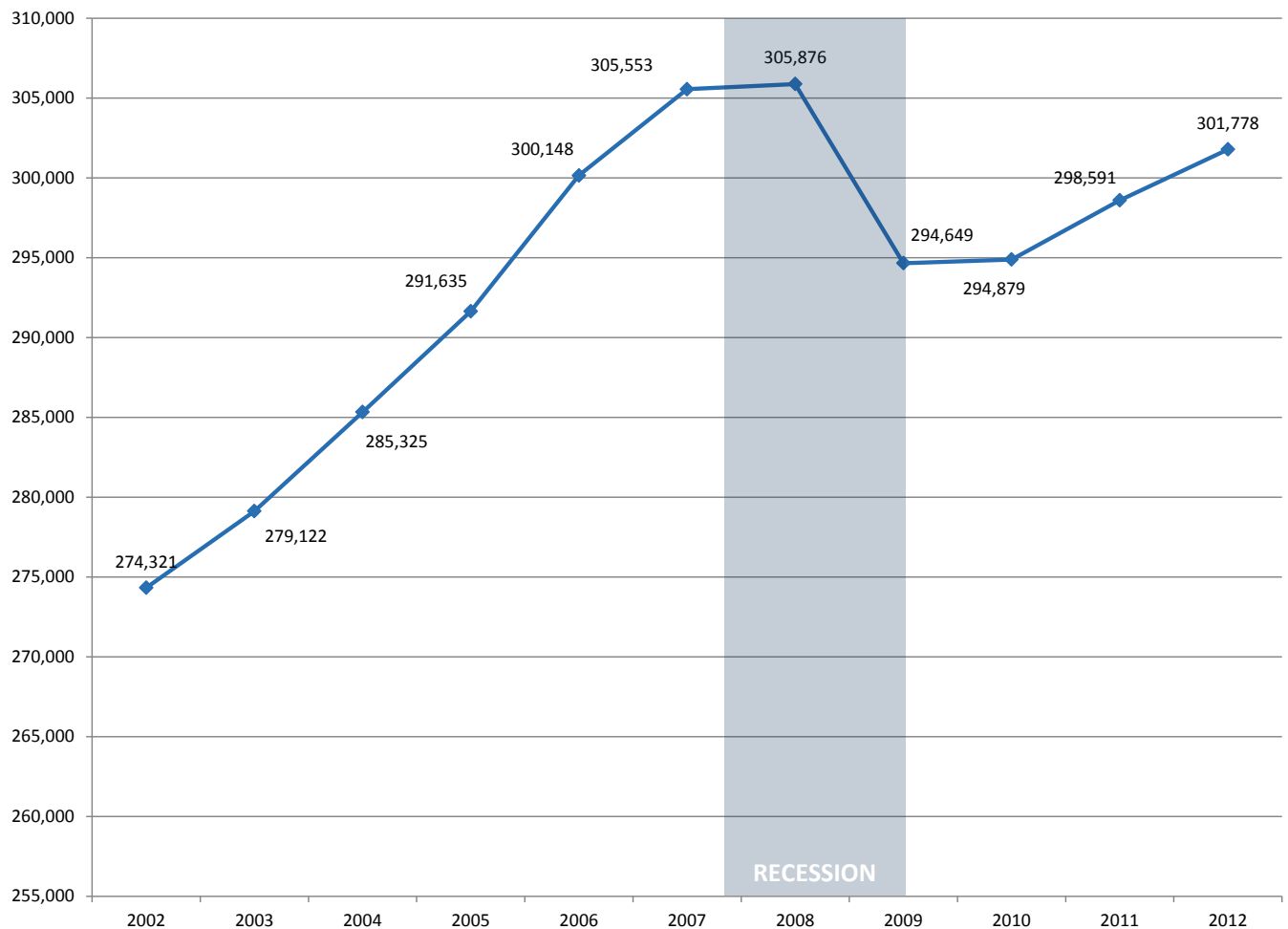
## EMPLOYMENT AND UNEMPLOYMENT

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

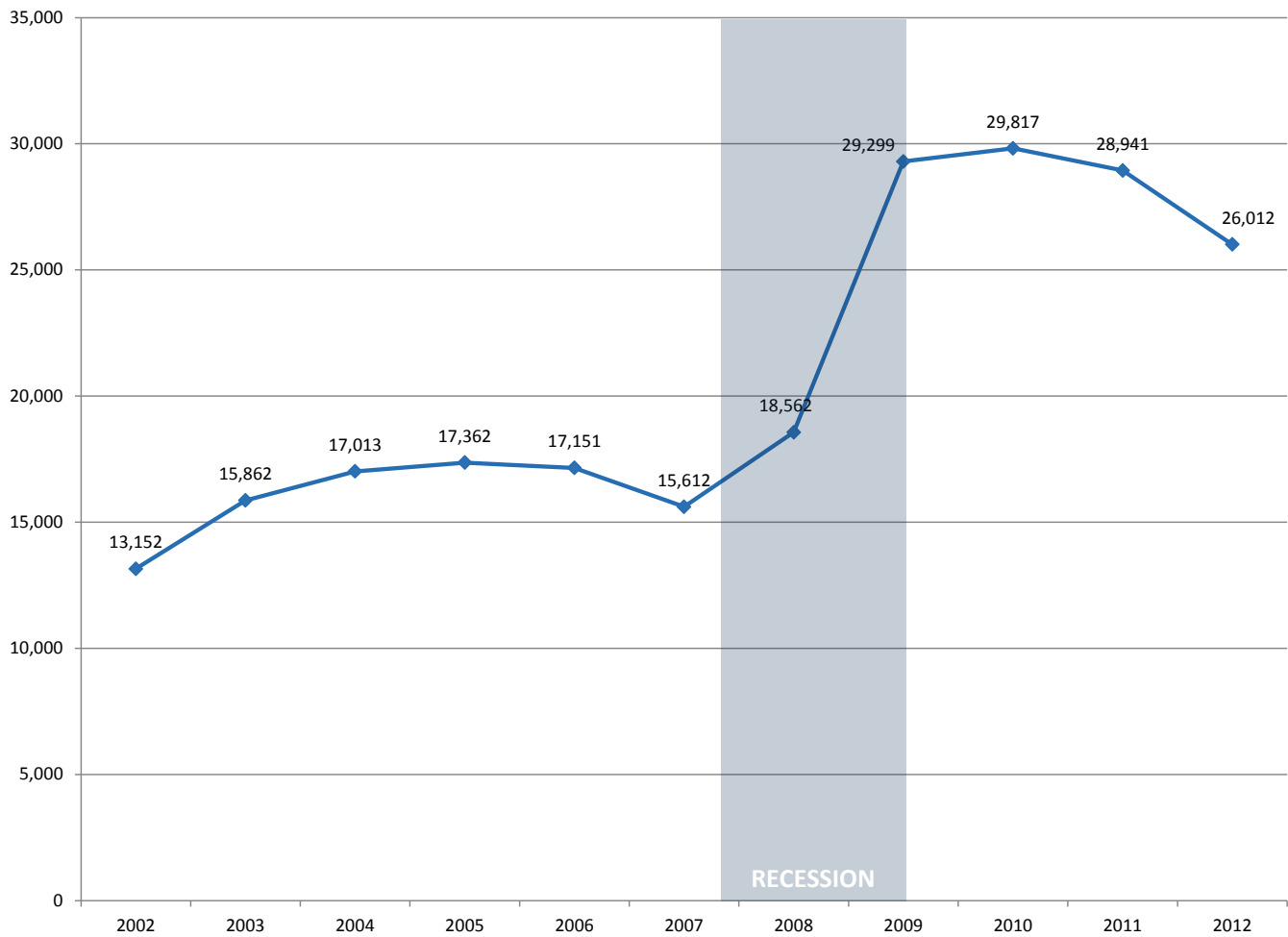
In Figure 6, the recession (officially from December 2007 through June 2009) had a great effect on the labor force. Employment dropped, and unemployment increased by 88 percent.

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



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

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

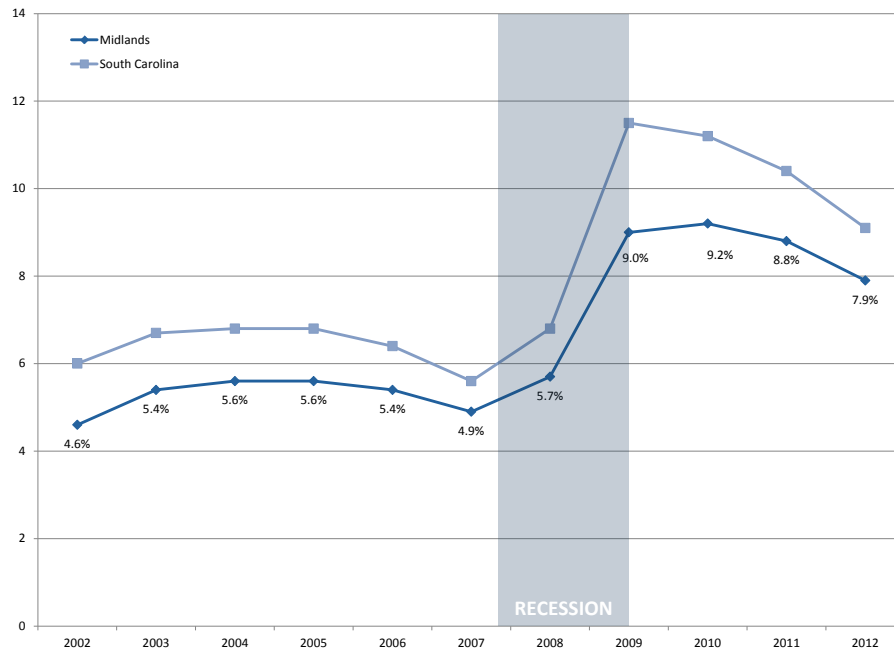


Source: BLS, SCDEW, LAUS

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.

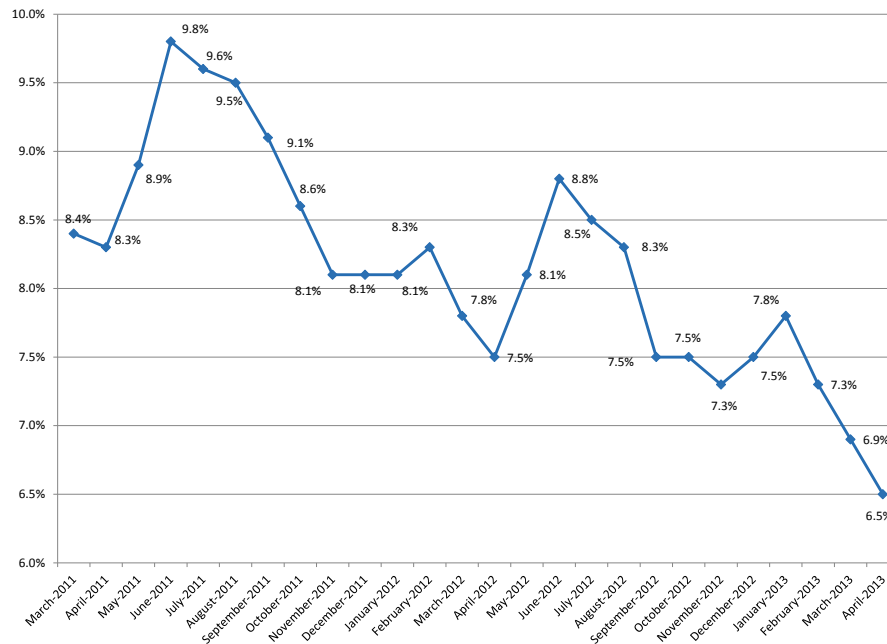
**Figure 8: Annual Unemployment - 2002-2012**



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

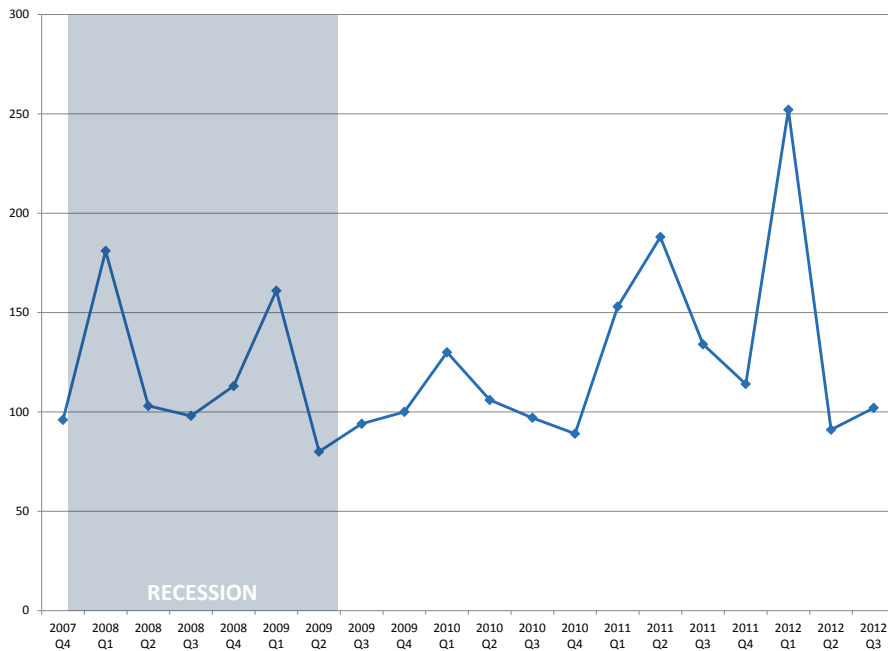
**NEW STARTUP FIRMS**

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.

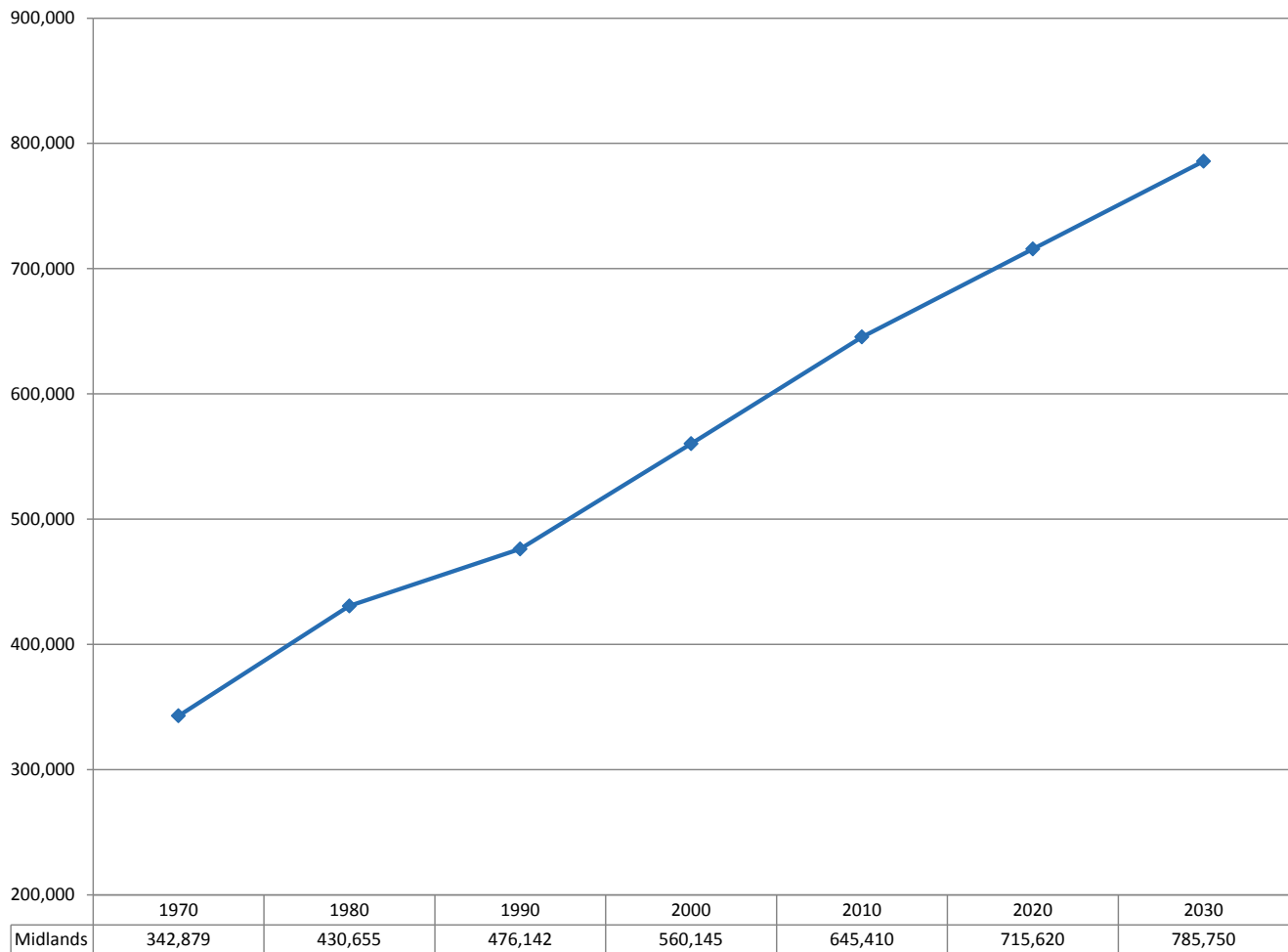
**Figure 12: Population by Age**

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

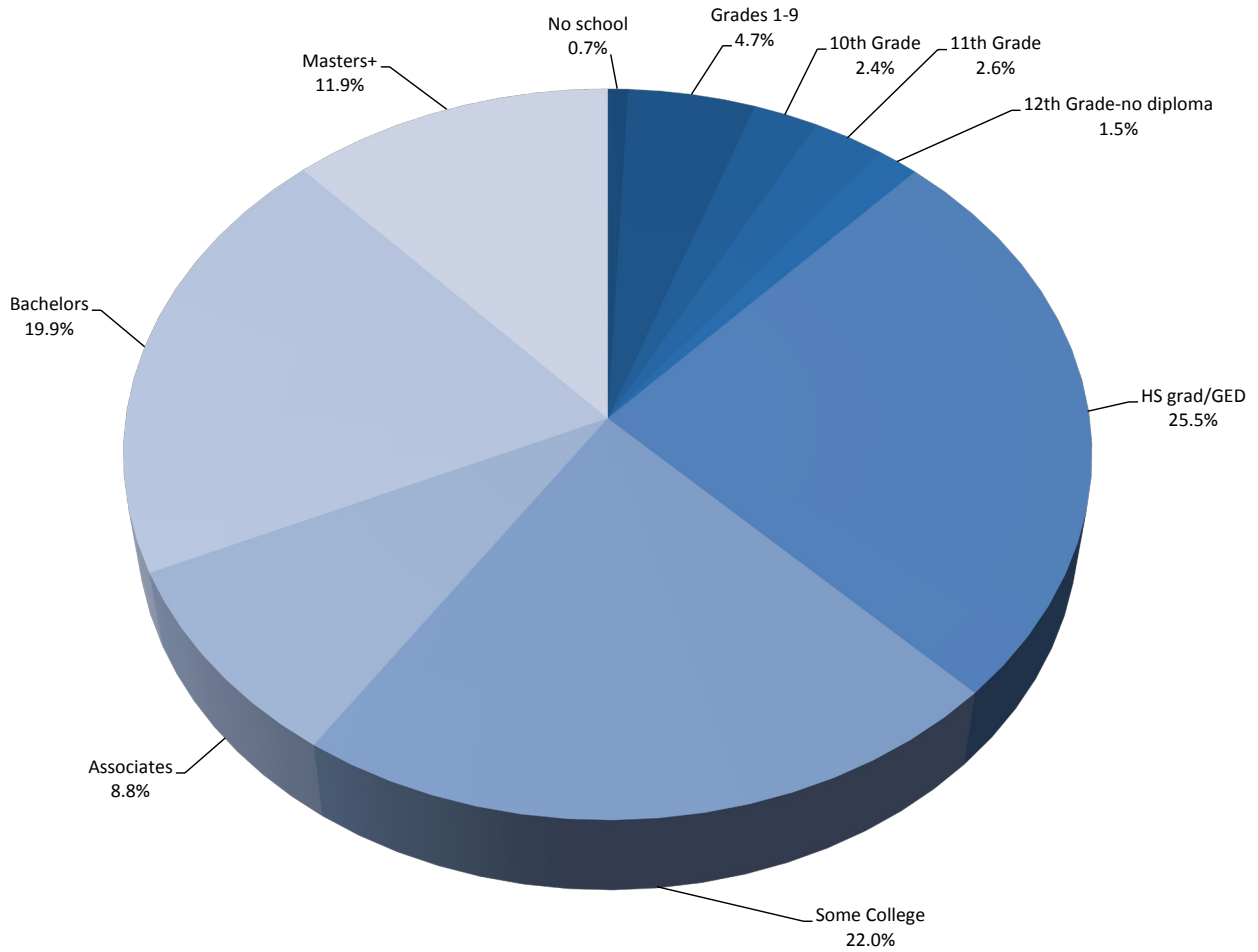
The Midlands LWIA has a lower concentration of residents with a high school diploma or less than the state does as a whole but a higher concentration with more than a high school education than the state as a whole.

**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**

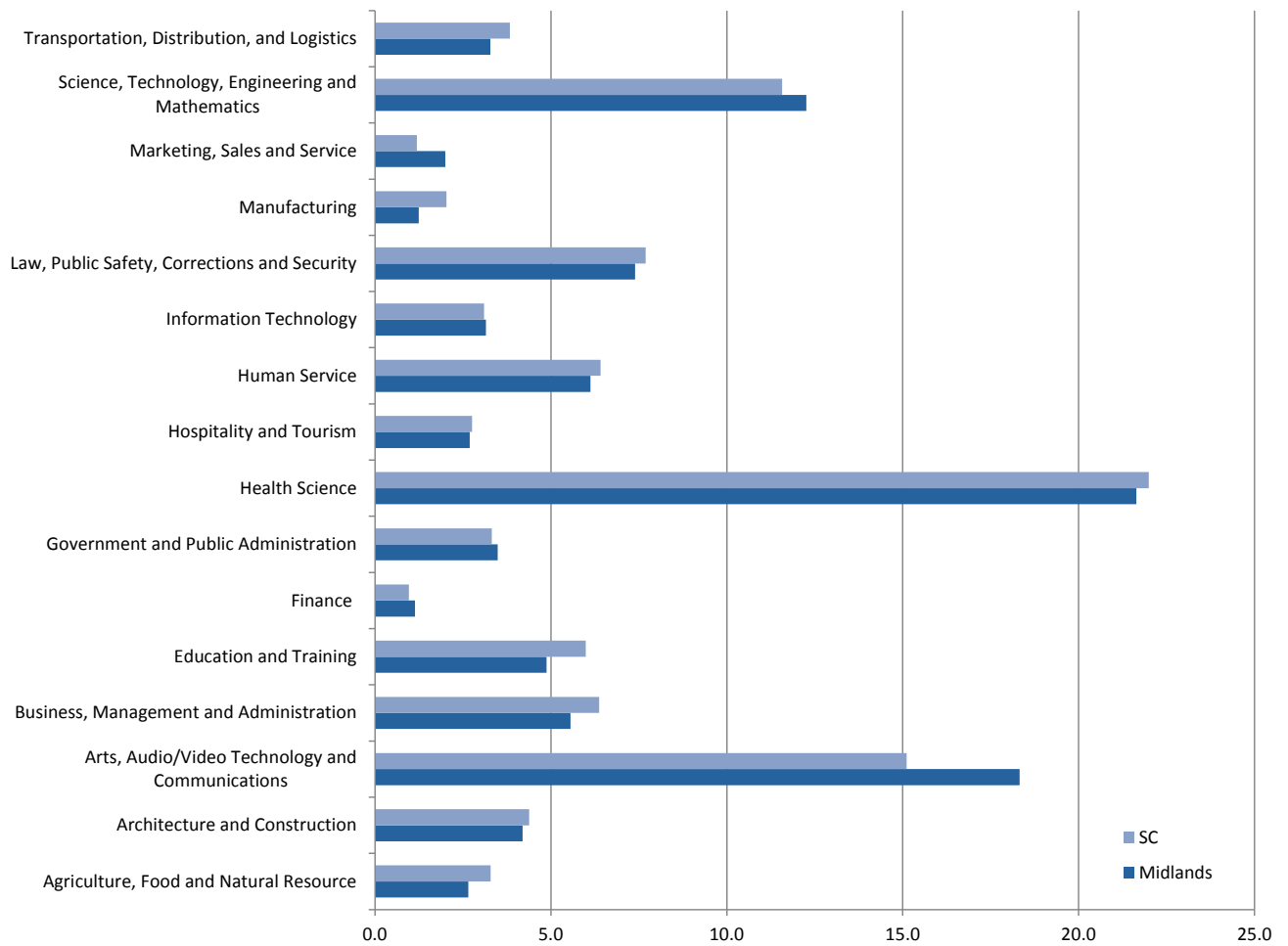


Source: US Census Bureau, ACS, SCDEW

### ***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**

<b>Cluster</b>	<b>Midlands</b>	<b>SC</b>
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

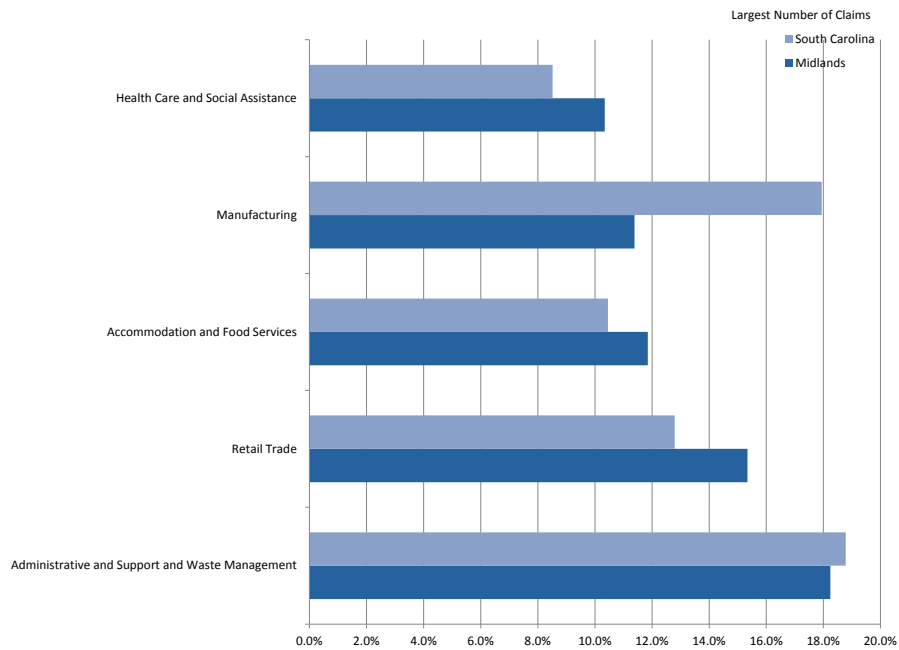
Source: SC Commission on Higher Education, [http://www.che.sc.gov/New\\_Web/Data&Pubs.htm](http://www.che.sc.gov/New_Web/Data&Pubs.htm)

### *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**



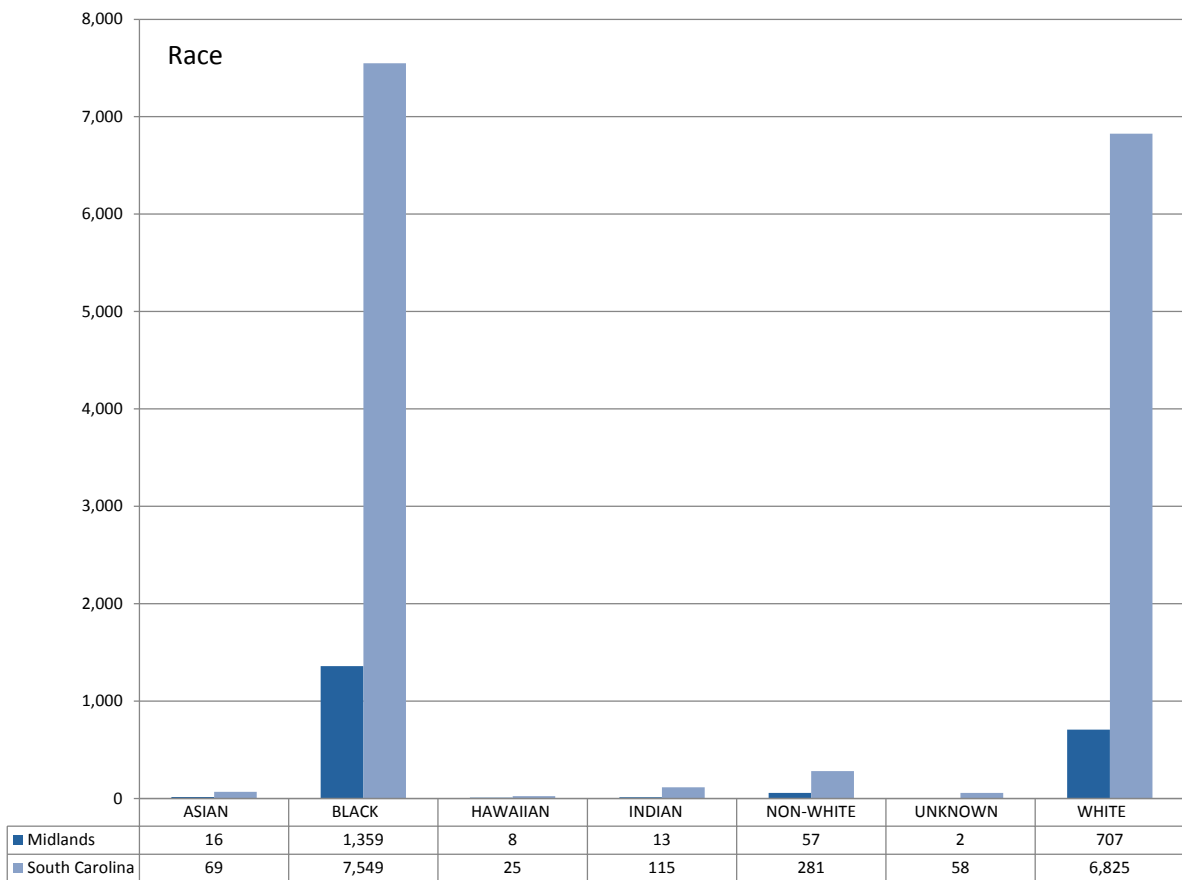
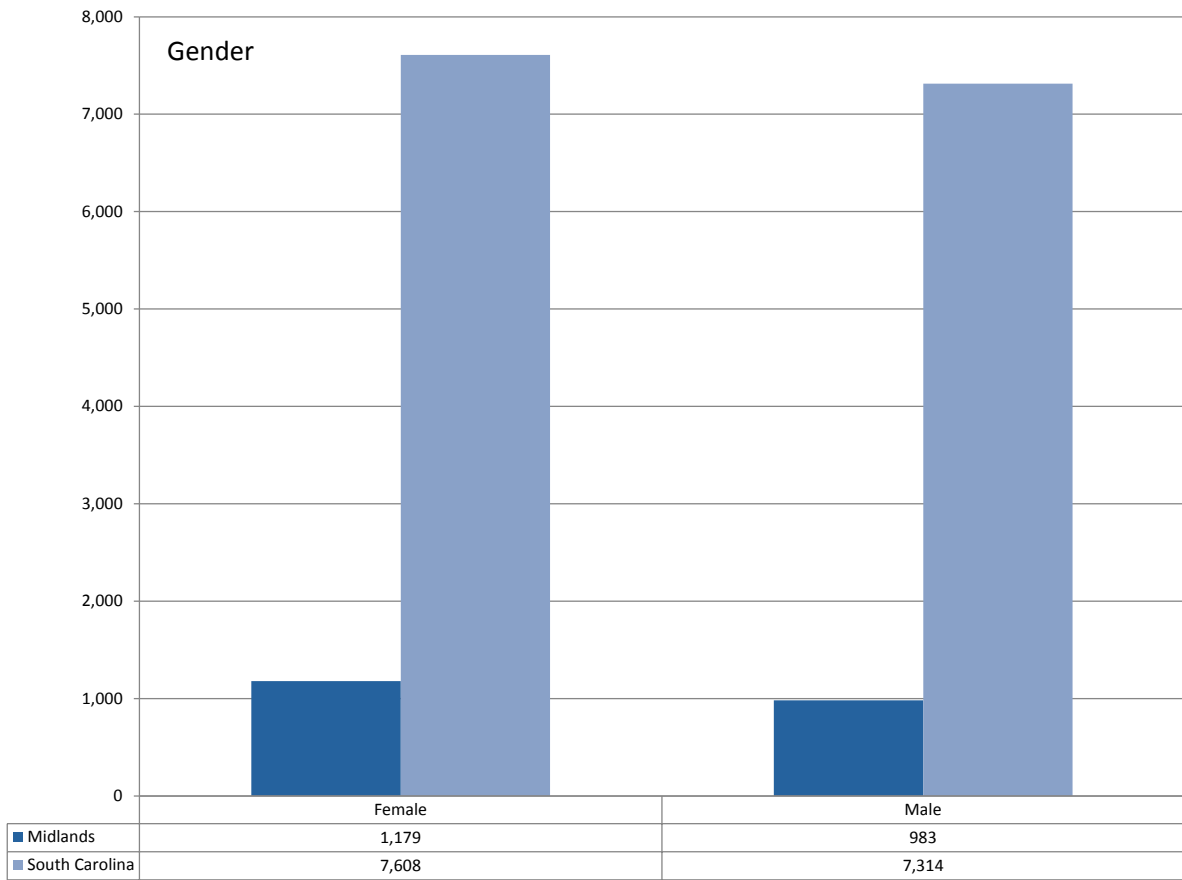
Occupation	Midlands	South Carolina
Administrative and Support and Waste Management	314	2,373
Retail Trade	264	1,616
Accommodation and Food Services	204	1,321
Manufacturing	196	2,267
Health Care and Social Assistance	178	1,076
Professional, Scientific, and Technical Services	91	698
Construction	73	820
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

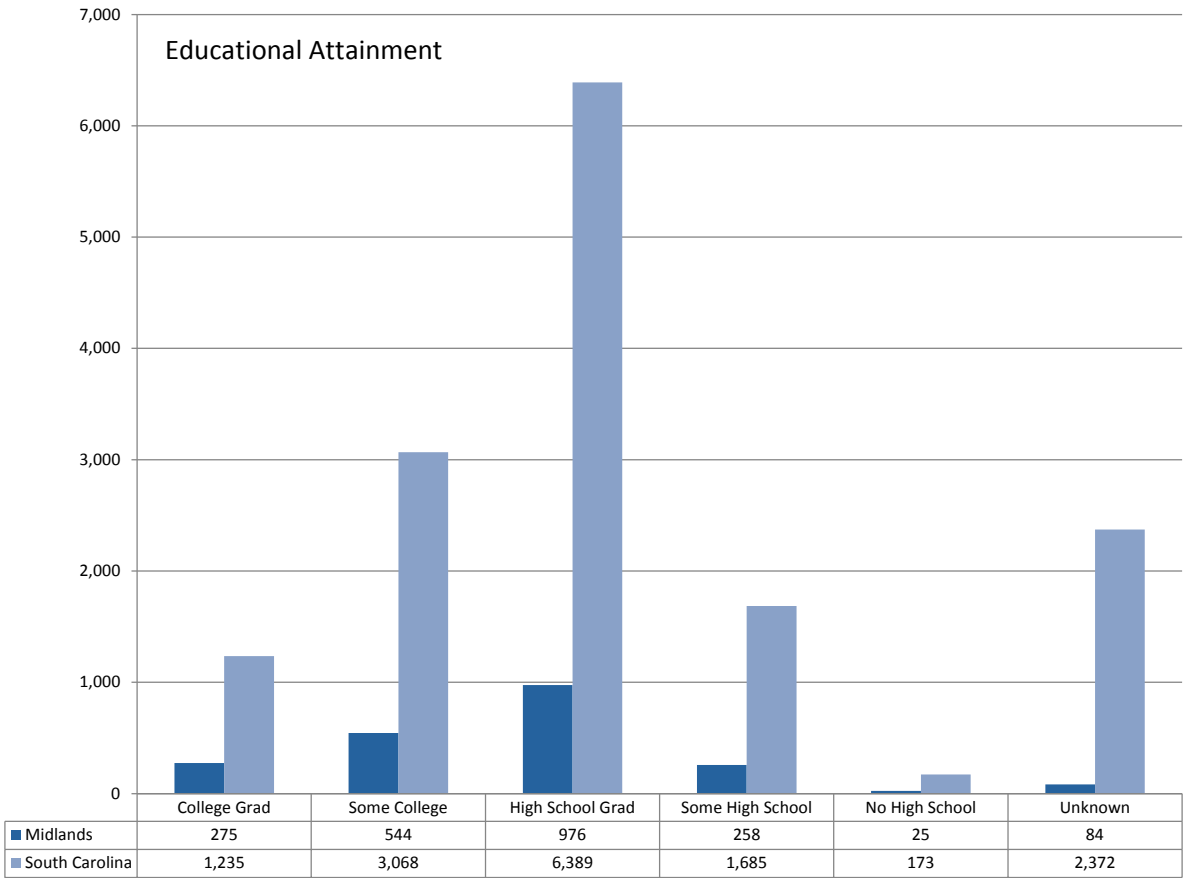
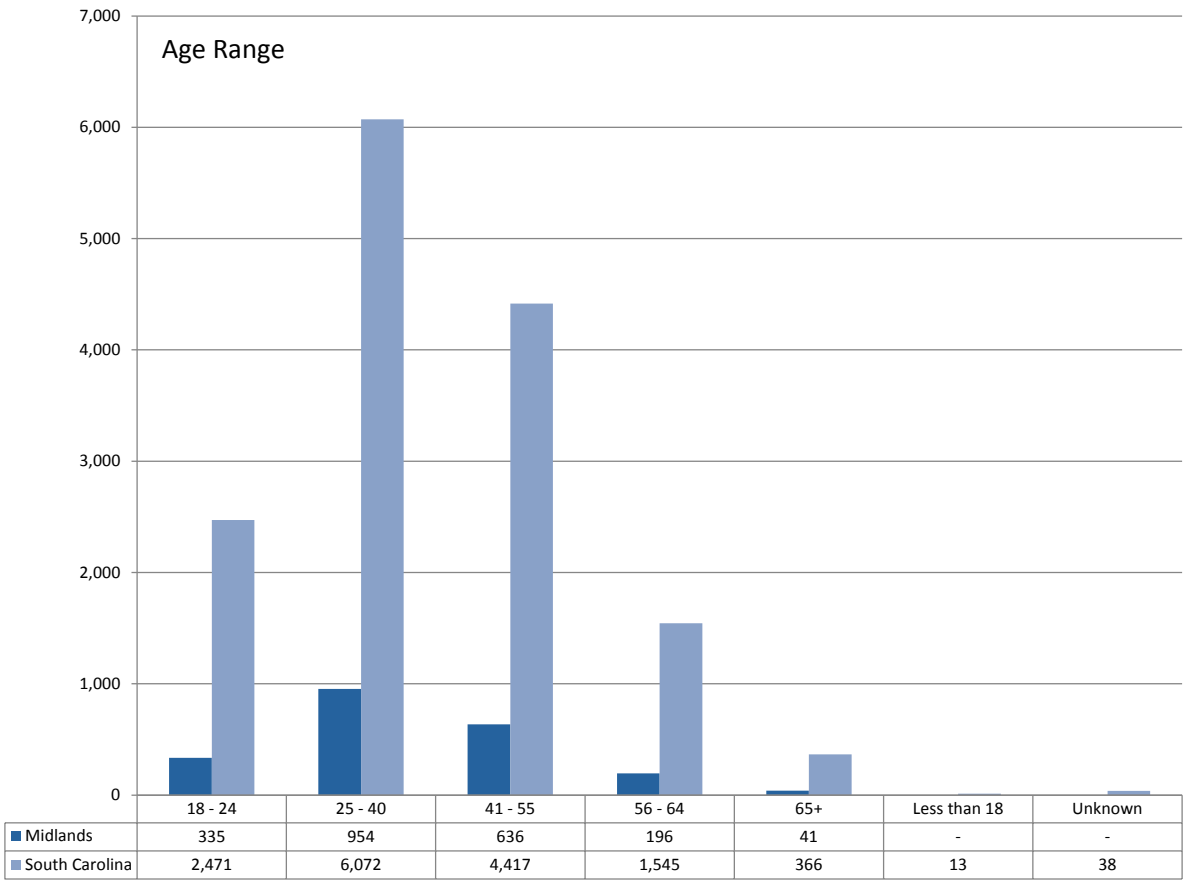
Source: SCDEW

### 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.

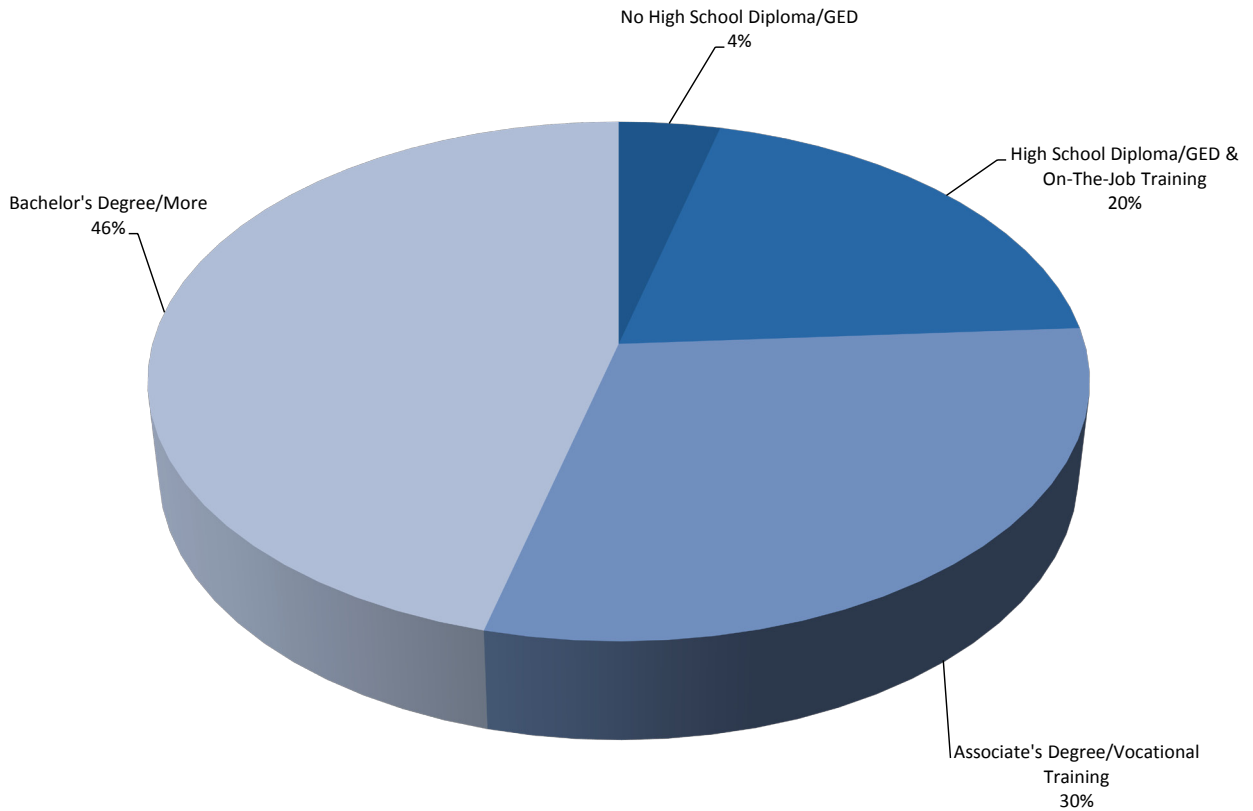
**Figure 25: Growing Occupations - 2008-2018**

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.