

SANTEE-LYNCHES LWIA WORKFORCE REPORT 2012



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

About SC DEW and LMI:

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

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EXECUTIVE SUMMARY

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

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

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

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

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

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

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

INTRODUCTION

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

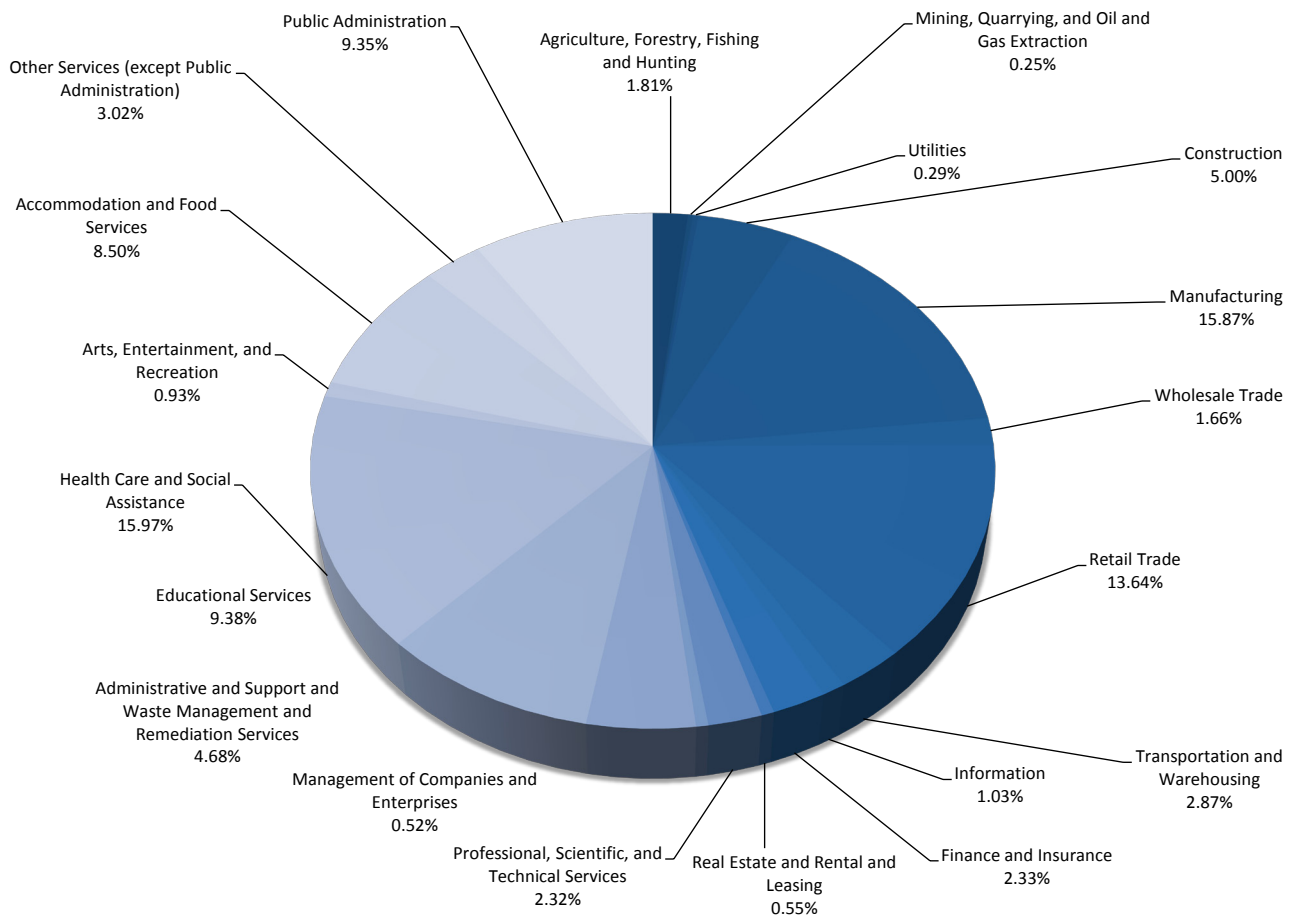
The economic changes this year in the Santee-Lynches LWIA demonstrate the shifting needs of employers and employees. Cultivating an understanding of the workforce allows all four counties to respond to anticipated future needs. Analyses help to identify the gap between what the workforce has in the way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

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

ECONOMIC DISCUSSION: A CURRENT PICTURE OF THE WORKFORCE

EMPLOYMENT BY INDUSTRY

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



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

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

LOCATION QUOTIENT

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

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

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

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

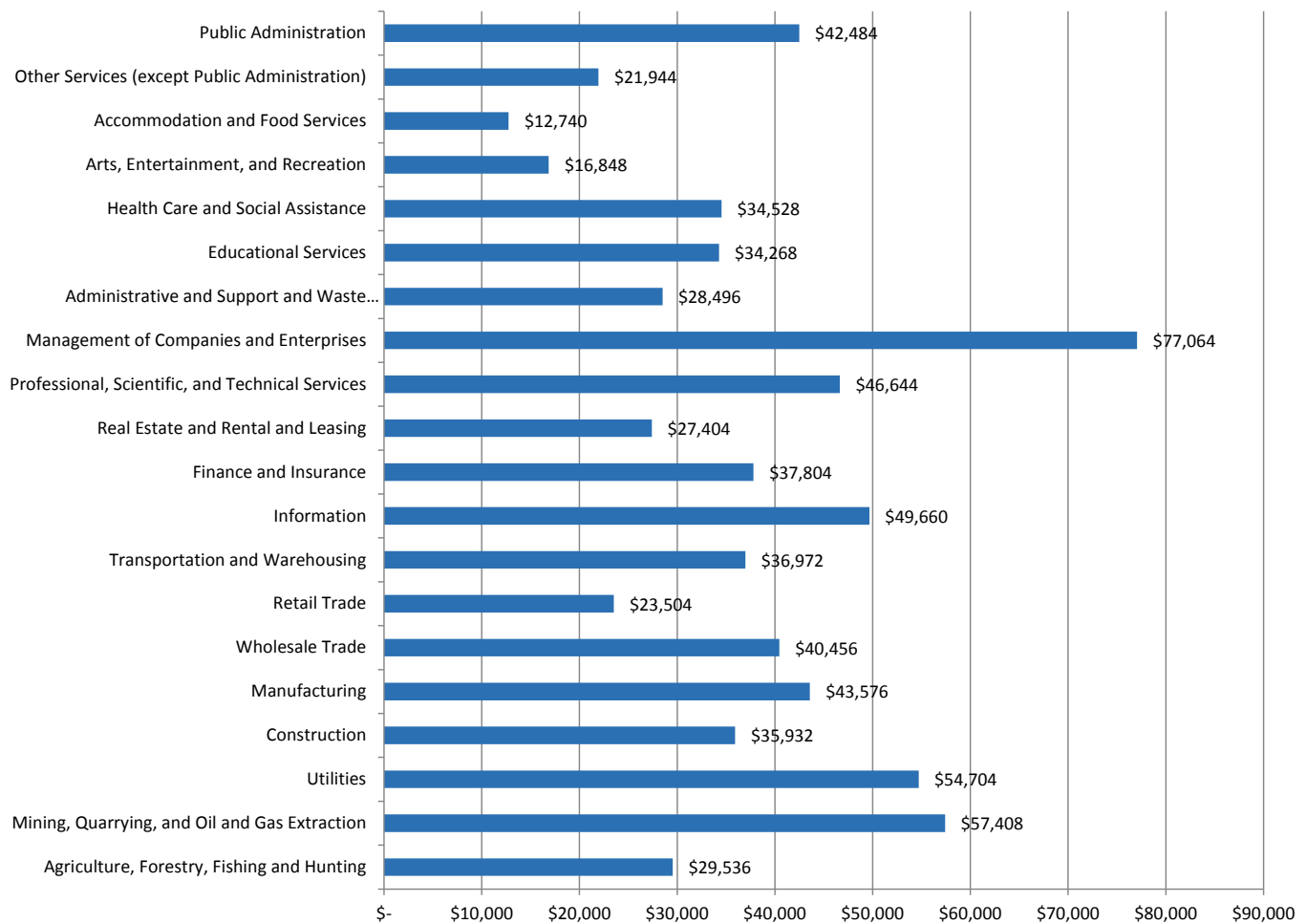
Textile Mills have one of the highest location quotients in the area at 31.4 in Kershaw County. Forestry and Logging are dominant sectors in Lee and Kershaw counties with LQ's of 31.8 and 15.9, respectively. Crop Production is concentrated in Clarendon and Lee counties. Diverse industries are found throughout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

AVERAGE ANNUAL WAGE BY INDUSTRY

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

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

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



Source: BLS, SCDEW, QCEW

OCCUPATIONAL EMPLOYMENT

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

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

Figure 4: Top 20 Occupations with Wages - 2012

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

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

SKILLS DATA

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

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

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

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

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

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

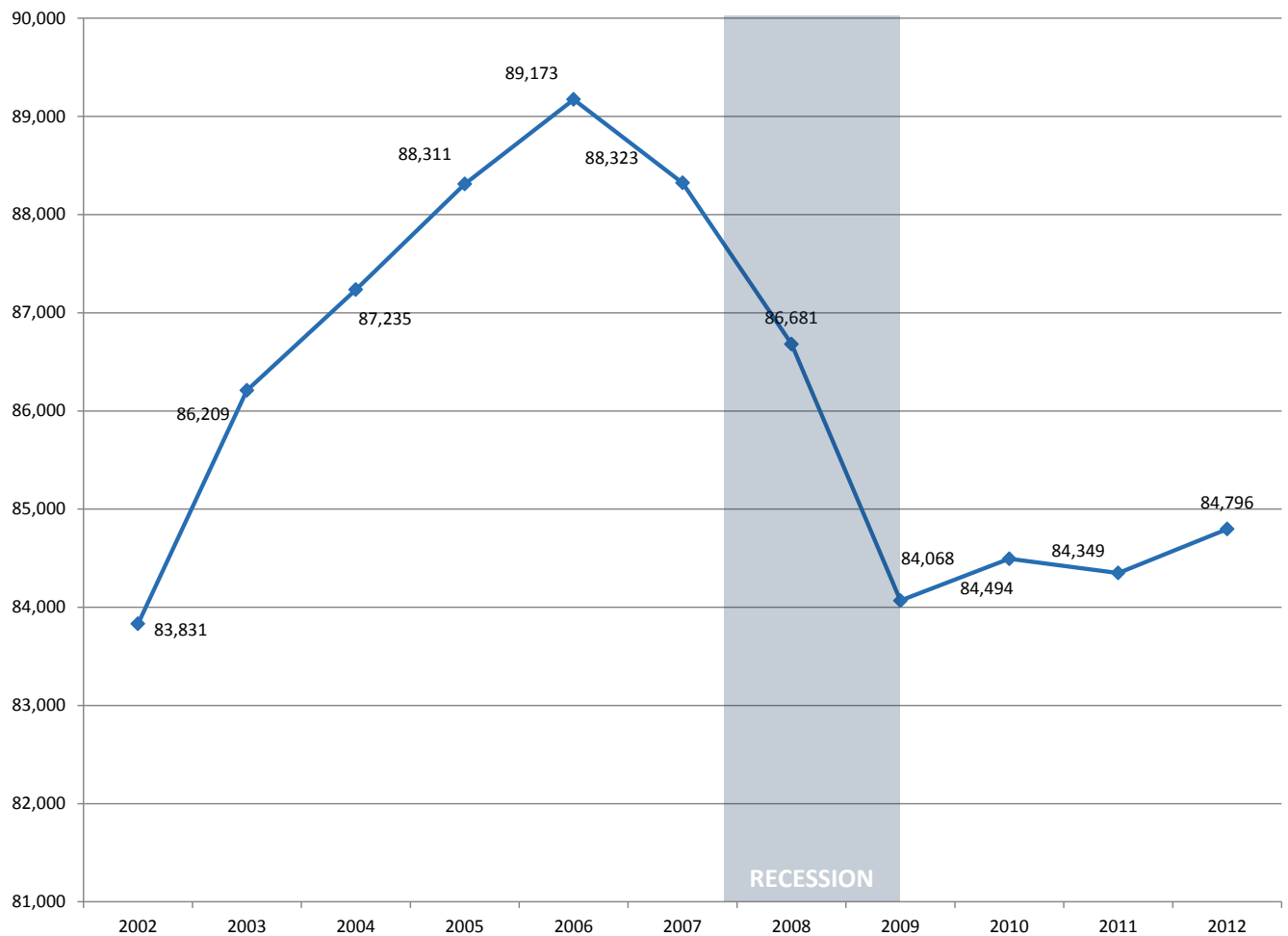
EMPLOYMENT AND UNEMPLOYMENT

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

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

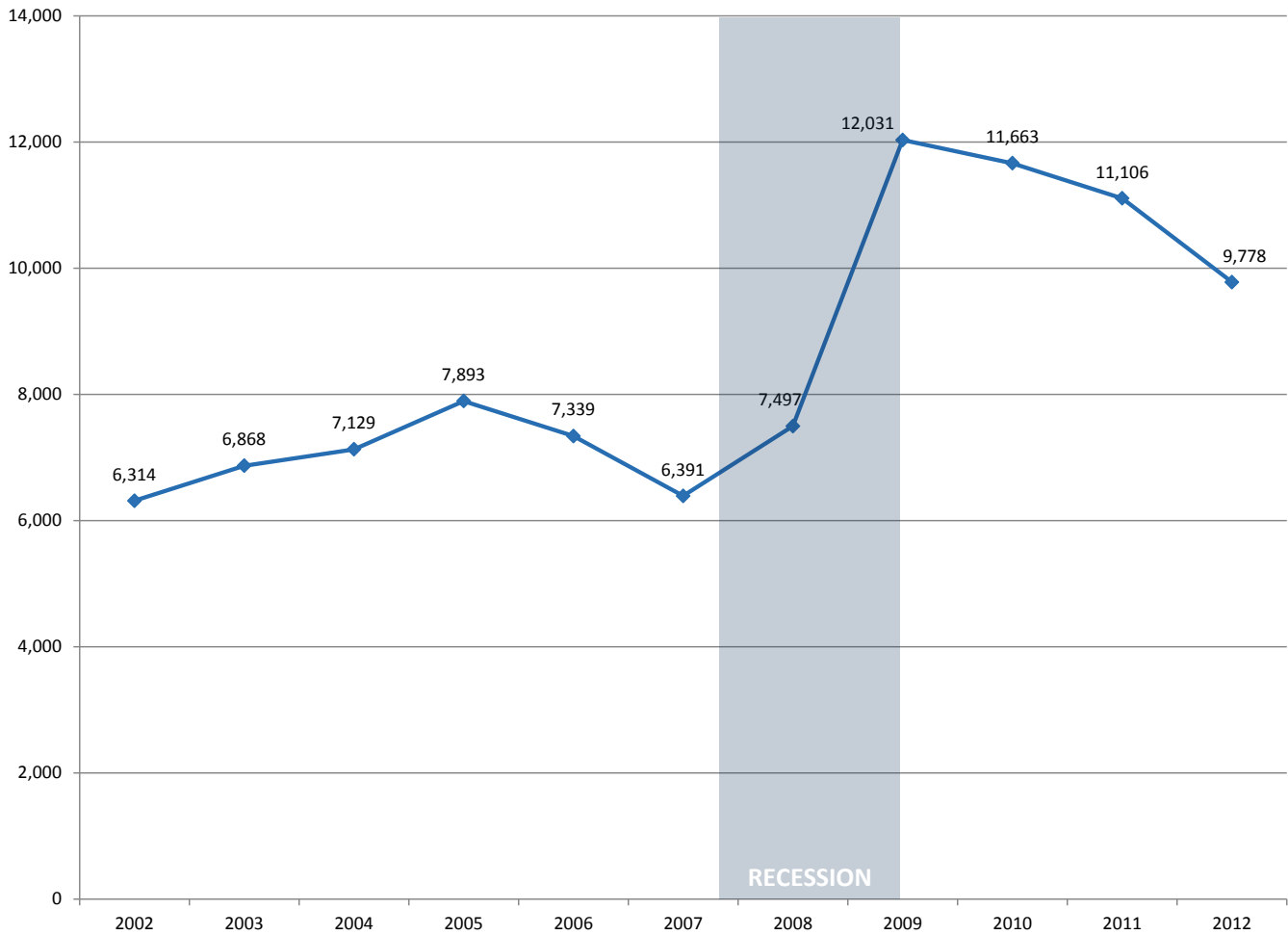
In Figure 6, the recession (officially from December 2007 through June 2009) had a great effect on the labor force. Employment dropped, and unemployment increased by 88 percent.

Figure 6: Employment - 2002-2012



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

Figure 7: Unemployment - 2002-2012

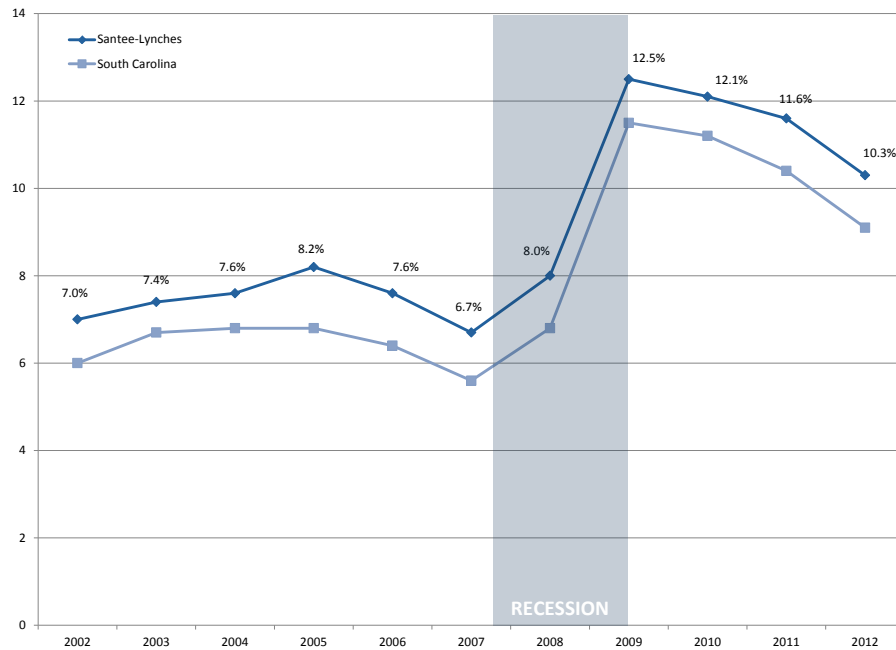


Source: BLS, SCDEW, LAUS

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

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

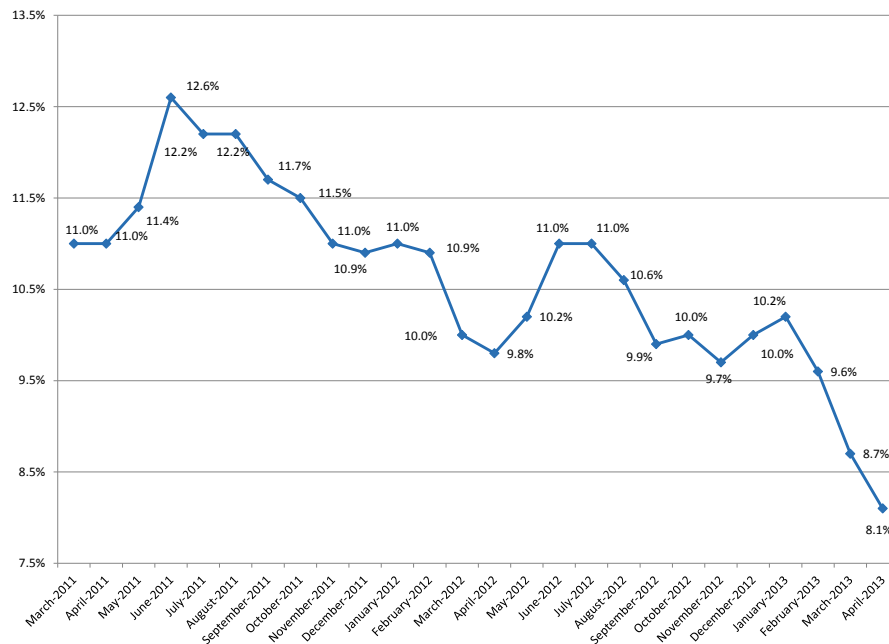
Figure 8: Annual Unemployment - 2002-2012



Source: BLS, SCDEW, LAUS

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

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



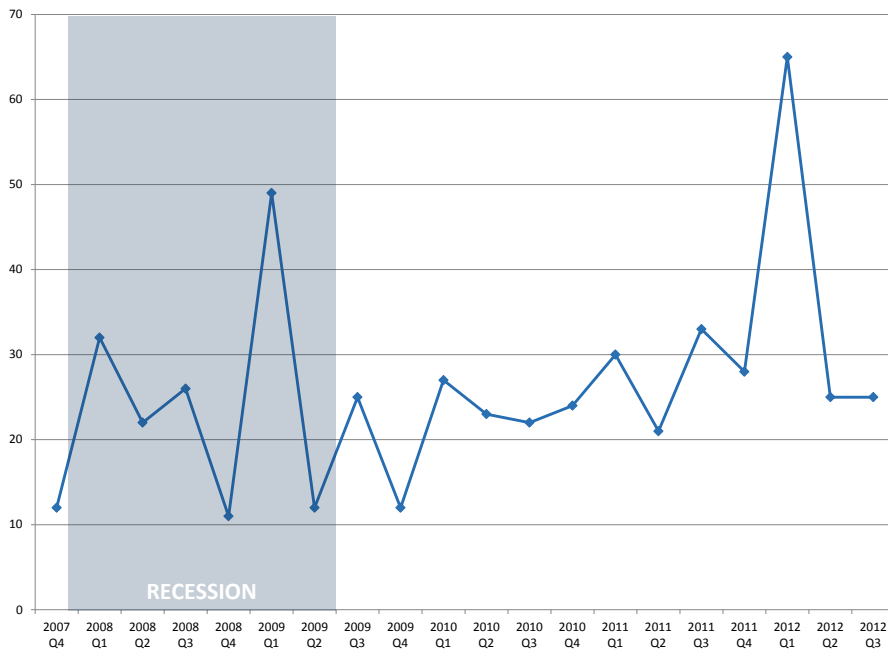
Source: BLS, SCDEW, LAUS

NEW STARTUP FIRMS

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

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

Figure 10: New Startup Firms - 2007-2012



Source: BLS, SCDEW, QCEW

EMPLOYERS BY SIZE OF ESTABLISHMENT

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

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

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

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

Source: BLS, SCDEW, QCEW

SUPPLY: WHAT'S OUT THERE?

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

POPULATION BY AGE

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

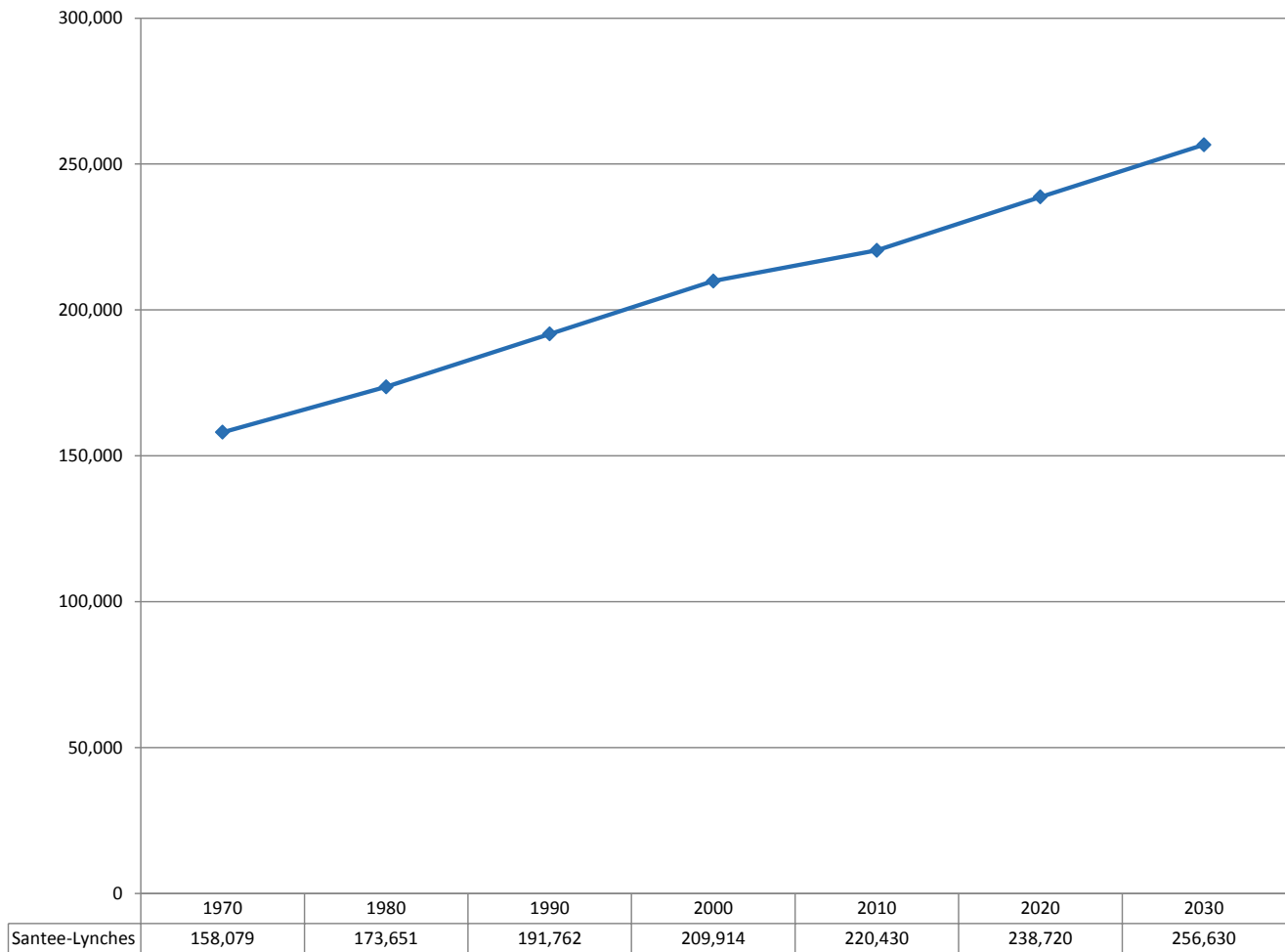
Figure 12: Population by Age

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

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

POPULATION CHANGE AND MIGRATION

Figure 13: Population Projections to 2030



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

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

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

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

Source: US Census Bureau, ACS, SCDEW

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

COMMUTING PATTERNS

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

Figure 15: Commuting Patterns - 2010

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

Source: US Census Bureau, ACS

EDUCATIONAL ATTAINMENT

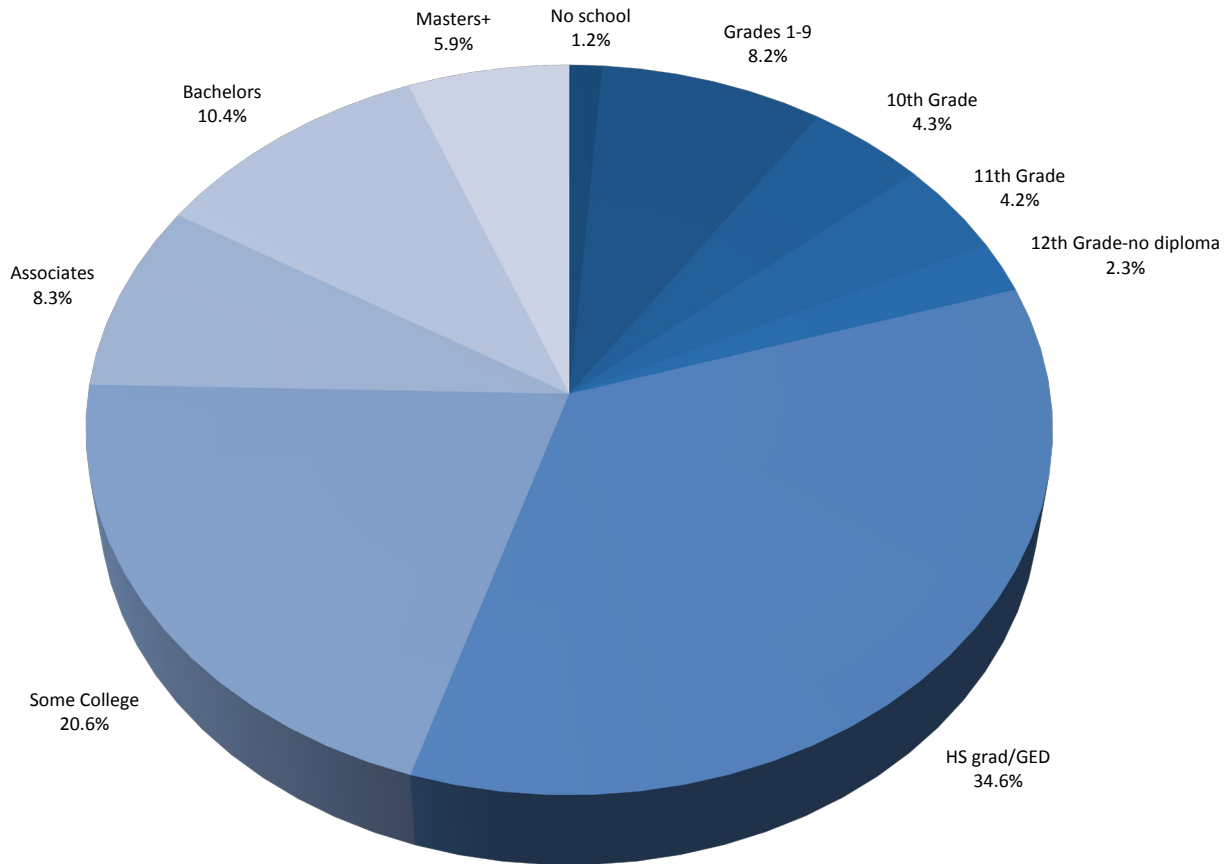
The Santee-Lynches LWIA has a higher concentration of residents with a high school diploma or GED or some college education than the state as a whole but a lower concentration with an associate's degree or higher than the state.

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

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

Source: US Census Bureau, ACS

Figure 17: Educational Attainment - Santee-Lynches 2011

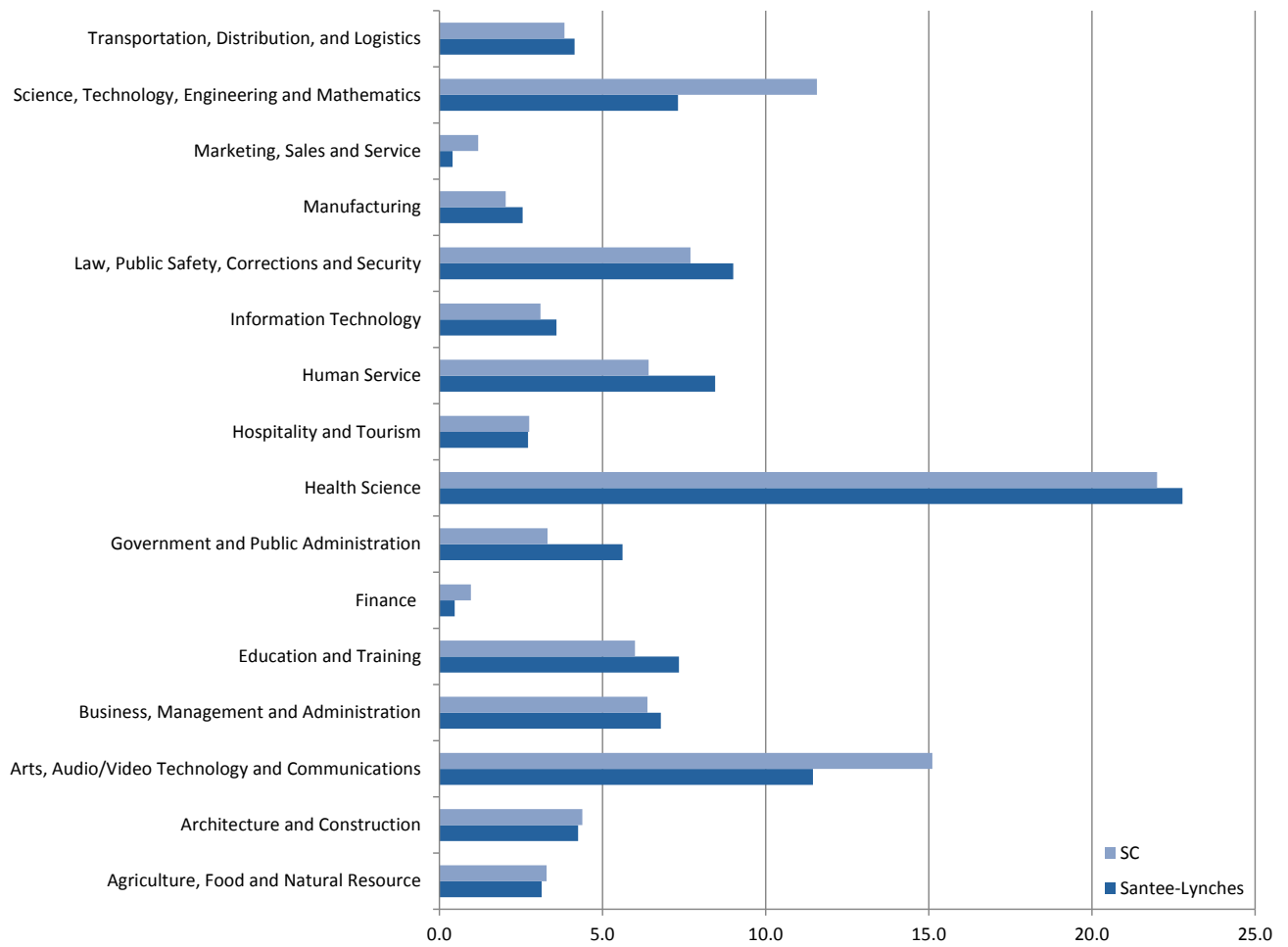


Source: US Census Bureau, ACS, SCDEW

CAREER CLUSTERS SELECTED BY HIGH SCHOOL STUDENTS

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

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



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

Source: SC Department of Education

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

Figure 19: Career Clusters - 2012

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

Source: SC Department of Education

DEGREES AWARDED

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

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

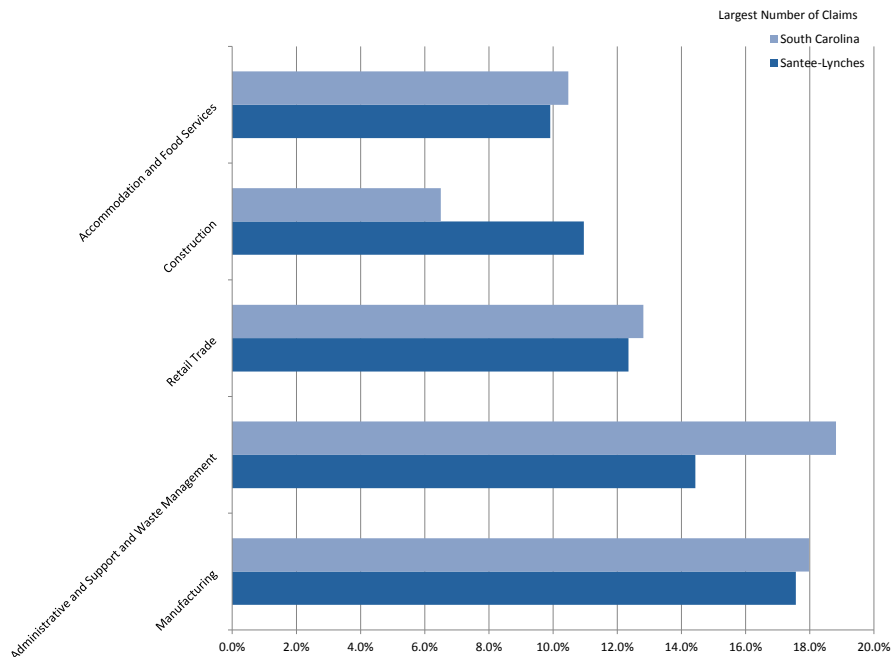
Majors	
Liberal Arts and Sciences/Liberal Studies	283
Registered Nursing/Registered Nurse	160
Data Processing & Data Processing Technology	33
Accounting	29
Business Administration and Management, General	25
Welding Technology/Welder	25
Criminal Justice/Law Enforcement Administration	22
Business Administration,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

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

CHARACTERISTICS OF UI CLAIMS BY OCCUPATION

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

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



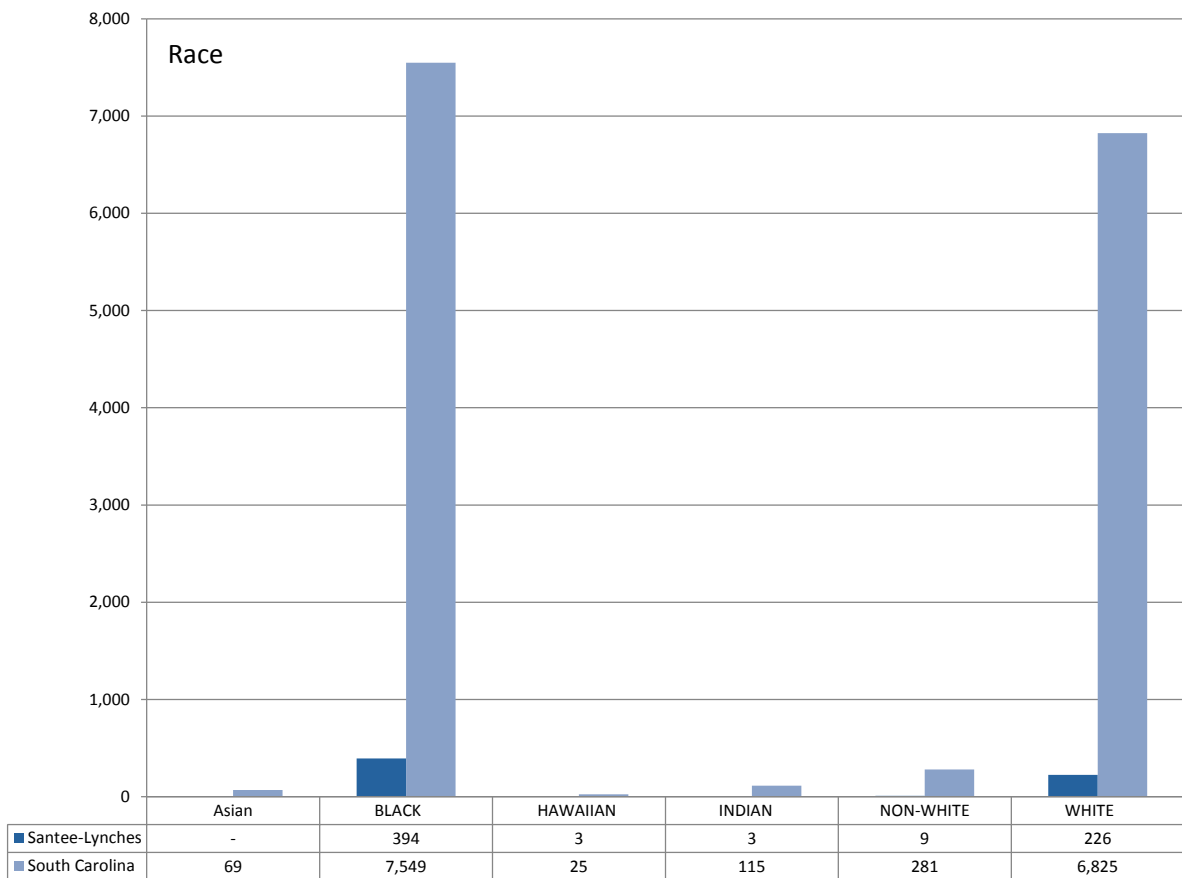
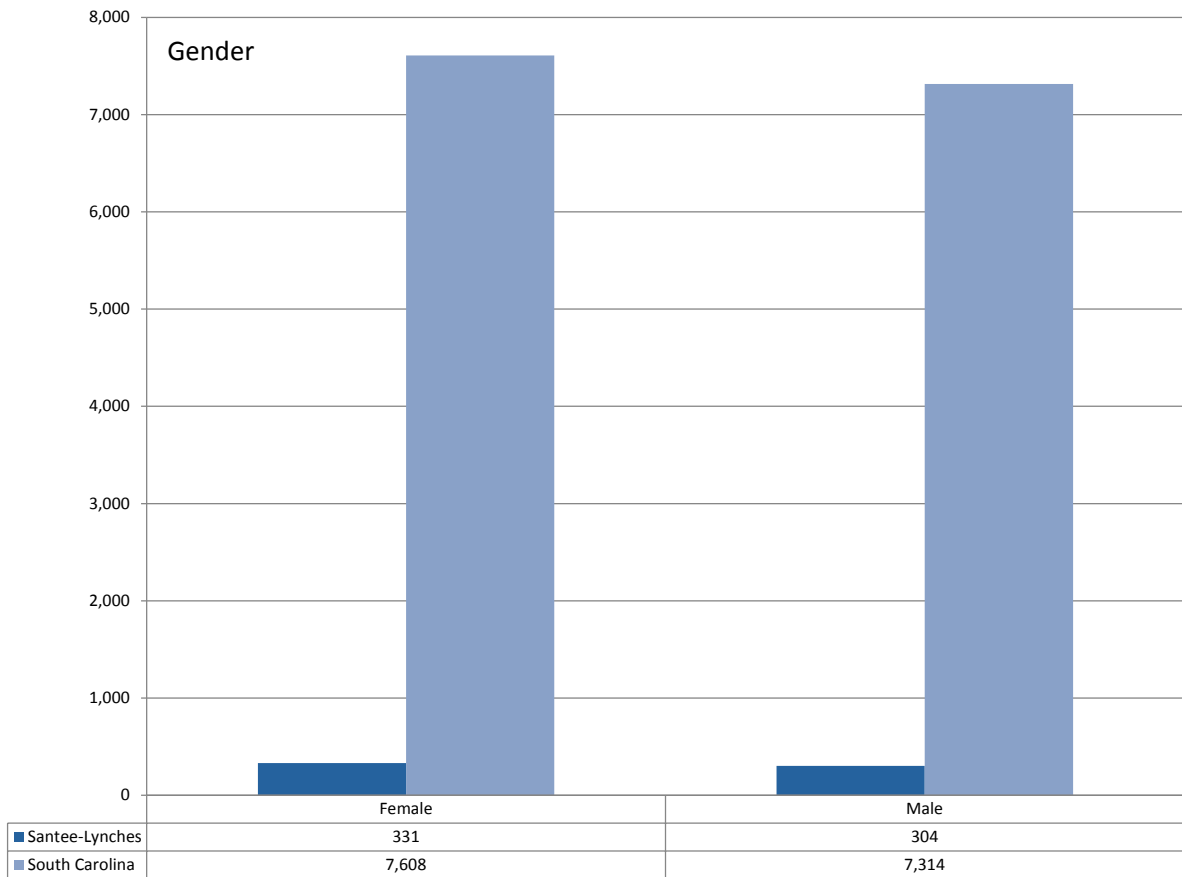
Occupation	Santee-Lynches	South Carolina
Manufacturing	101	2,267
Administrative and Support and Waste Management	83	2,373
Retail Trade	71	1,616
Construction	63	820
Accommodation and Food Services	57	1,321
Health Care and Social Assistance	54	1,076
Professional, Scientific, and Technical Services	35	698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

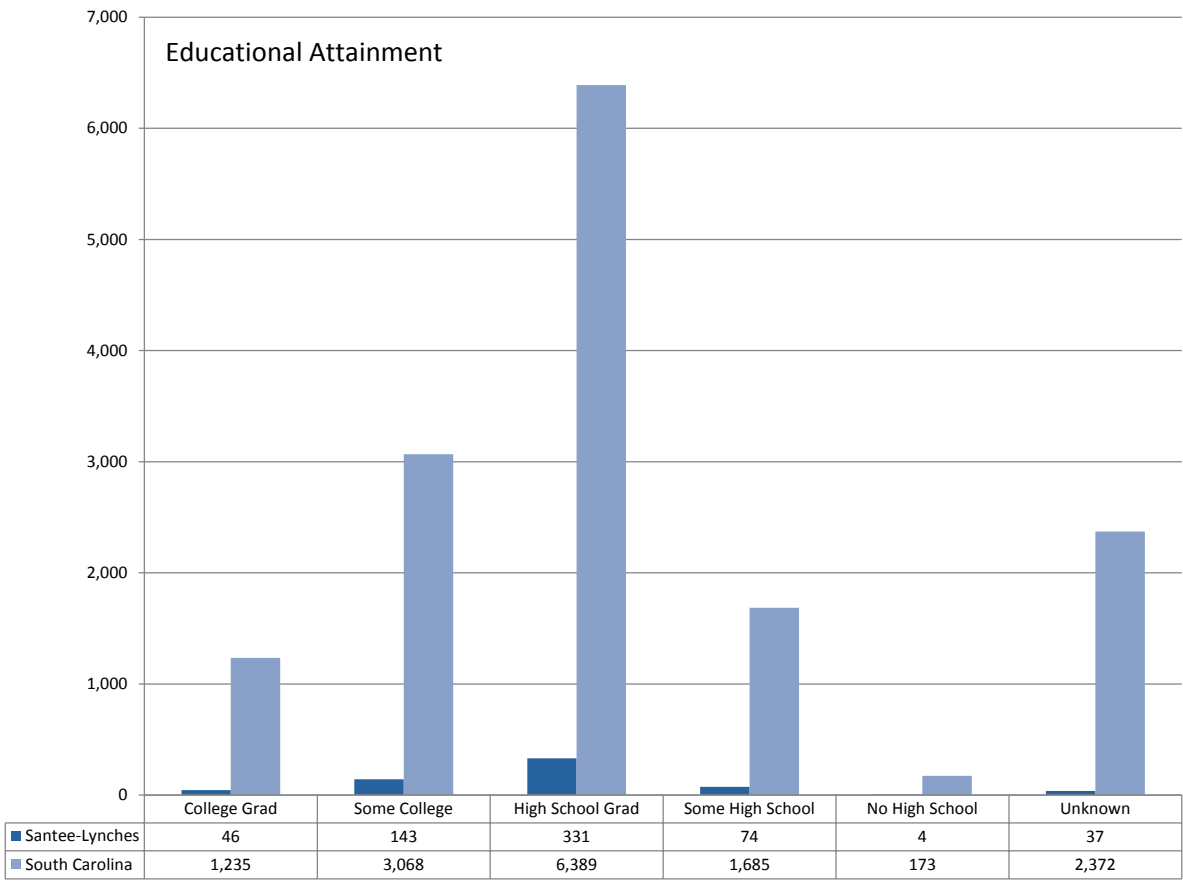
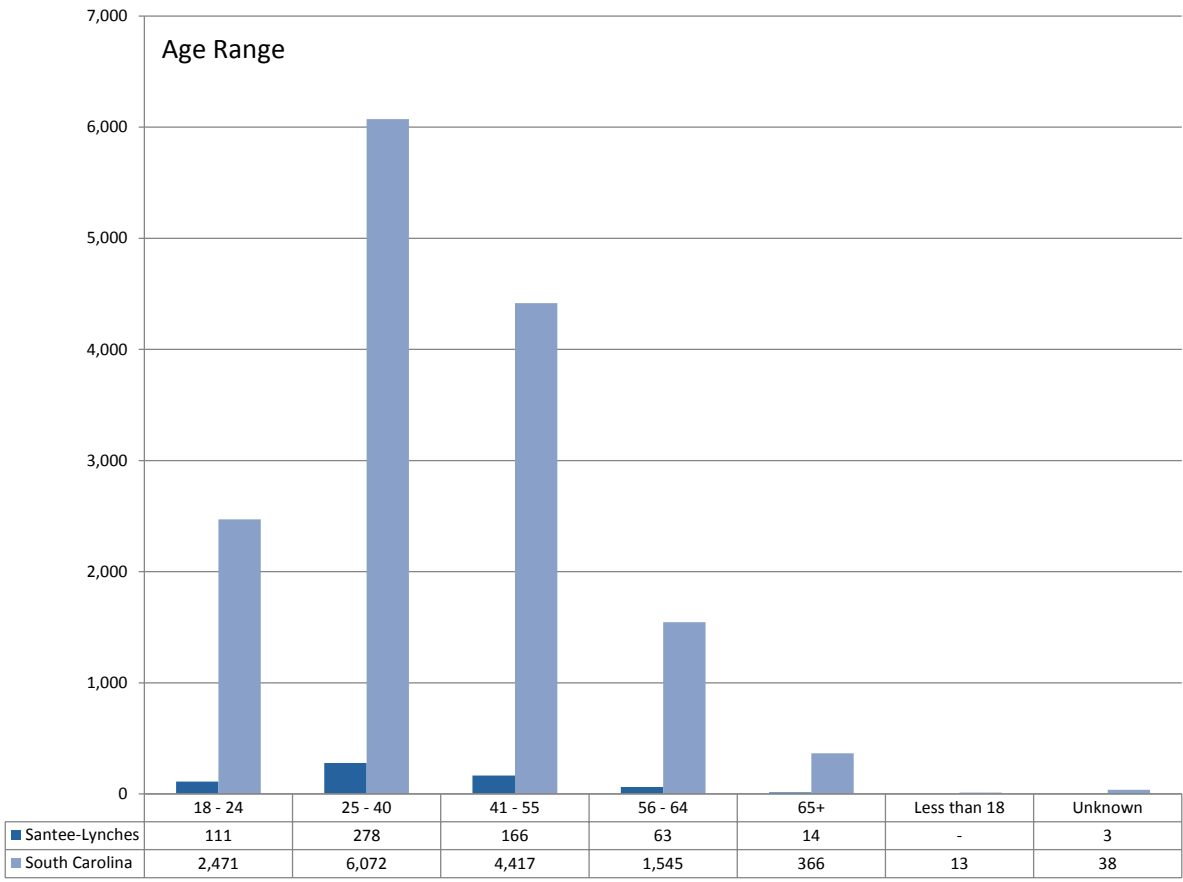
Source: SCDEW

UNEMPLOYMENT INSURANCE CLAIMANT CHARACTERISTICS

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

Figure 22: UI Claimant Characteristics - April 2013





Source: SCDEW

DEMAND: WHAT DO WE NEED?

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

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

ONLINE JOB ADVERTISEMENTS

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

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

Note: A job advertisement may include multiple openings.

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

INDUSTRY PROJECTIONS

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

Figure 24: Industry Projections - 2008-2018

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

Source: BLS, SCDEW, QCEW, WI

OCCUPATIONAL PROJECTIONS

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

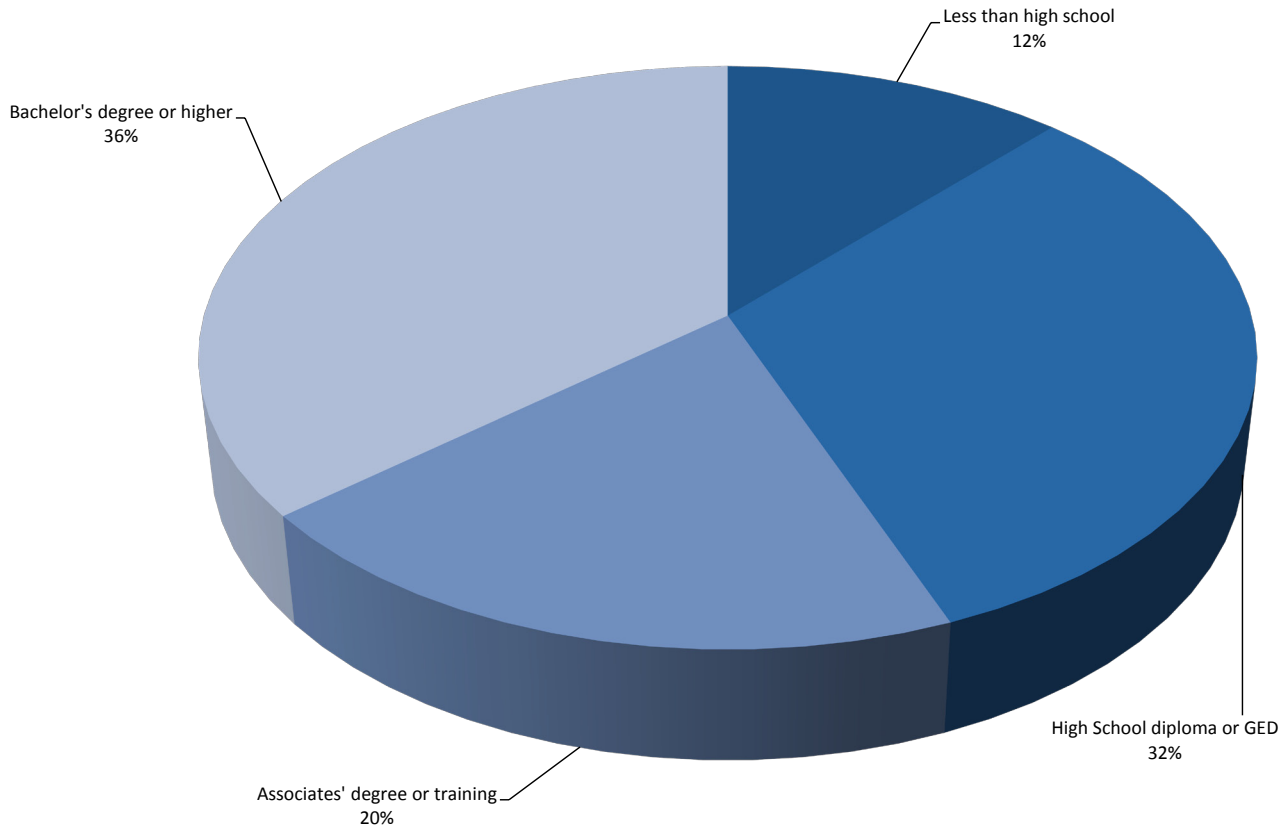
Figure 25: Growing Occupations - 2008-2018

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

Source: BLS, SCDEW, OES, WI

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

Figure 26: Education for Top 50 Projected Occupations



Source: BLS, SCDEW, OES, WI

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

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

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

Source: BLS, SCDEW, OES, WI

SKILLS OF PROJECTED OCCUPATIONS

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

Figure 28: Skill Levels

Low	11
Middle	21
High	18

Source: BLS, SCDEW, OES, WI

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

WORKFORCE CHALLENGES

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

Supply Findings

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

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

Demand Findings

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

Figure 29: Comparison of Supply and Demand

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

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

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

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

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

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

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

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

CONCLUSION

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

The data shows that:

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

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