

UPPER SAVANNAH LWIA WORKFORCE REPORT 2012



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

About SC DEW and LMI:

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

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EXECUTIVE SUMMARY

The employment leaders for Upper Savannah Local Workforce Investment Area (LWIA) are Manufacturing and Healthcare and Social Assistance. Employment growth is anticipated by 2018 in several industries, especially Health Care and Social Assistance and Administrative and Support and Waste Management and Remediation Services. The highest wages are paid by the Utilities and Wholesale Trade industries.

The LWIA's population grew by 4.2 percent from 2000 to 2010, and it has more residents 50 and over and less residents aged 20 to 39 than the state's average.

Employment is rising and unemployment is declining, although the LWIA has a current and historically higher unemployment rate than the state. Employment is concentrated in Greenwood, and nearly 18,000 more people leave the LWIA for work than enter it every day. Manufacturing is the largest industry represented in unemployment claims.

Upper Savannah has a higher proportion of residents with a high school education than the state does as a whole. However, 22 percent of residents do not have a high school diploma, and a lower percent of residents have postsecondary training than does the state overall. For projected growing jobs, 10 percent require no diploma, 34 percent require a diploma or GED, 14 percent require an associate's degree or vocational training, and 42 percent require a bachelor's degree or higher.

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

Upper Savannah LWIA has several factors working in its favor. It has a growing population and several educational institutions available to strengthen the workforce. The Manufacturing sector is an expanding employment force and has a high job multiplier. Workers are becoming smarter and are gaining skills; the LWIA is transitioning from low to middle skilled jobs.

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

INTRODUCTION

The Upper Savannah Local Workforce Investment Area is composed of Abbeville, Edgefield, Greenwood, Laurens, McCormick, Newberry, and Saluda counties and is located in the western part of our state. The LWIA borders Georgia and is home to the Ninety Six National Historic Site, the Greenwood Genetic Center, Lander University, Lake Greenwood, Lake Thurmond, Lake Russell, and six state parks.

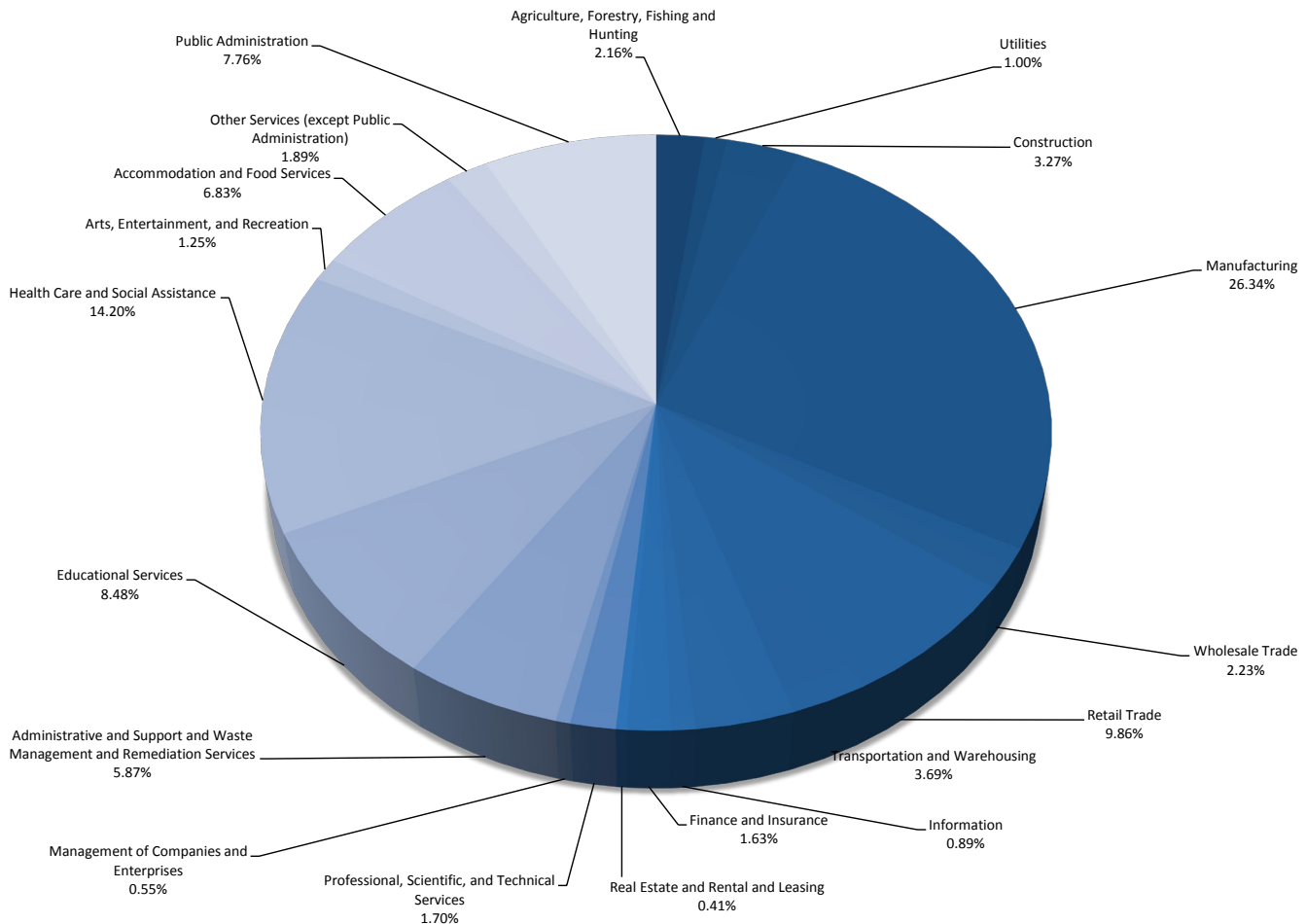
The economic changes this year in the Upper Savannah LWIA demonstrate the shifting needs of employers and employees. Cultivating an understanding of the workforce allows all seven counties to respond to anticipated future needs. Analyses help to identify the gap between what the workforce has in the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

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

ECONOMIC DISCUSSION: A CURRENT PICTURE OF THE WORKFORCE

EMPLOYMENT BY INDUSTRY

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



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

The Manufacturing and Healthcare and Social Assistance industries employ many workers in the Upper Savannah LWIA. Industries like Educational Services and Healthcare and Social Assistance are healthy and flourishing, while others like Construction are still recovering from the recession. The 2010 per capita income for a Upper Savannah LWIA resident was \$29,278, which is an increase of 39.9 percent from 2000.¹ Economic growth has taken place in the past decade to enhance the LWIA's workers, although the area is still recovering from a tough business cycle.

LOCATION QUOTIENT

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

Figure 2: Notable Location Quotients - 2011

Industry and Sectors	Location Quotient
<i>Abbeville County</i>	
Furniture and Related Product Manufacturing	4.1
Manufacturing	3.7
Utilities	2.2
<i>Edgefield County</i>	
Textile Mills	92.5
Forestry and Logging	49.5
Crop Production	26.2
<i>Greenwood County</i>	
Chemical Manufacturing	10.7
Wood Product Manufacturing	6.0
Forestry and Logging	3.3
<i>Laurens County</i>	
Plastics and Rubber Products Manufacturing	20.9
Textile Mills	17.4
Wood Product Manufacturing	10.6
<i>McCormick County</i>	
No Data	
<i>Newberry County</i>	
Forestry and Logging	40.3
Wood Product Manufacturing	16.1
Animal Production and Aquaculture	10.0
<i>Saluda County</i>	
Animal Production and Aquaculture	26.6
Forestry and Logging	20.2
Agriculture and Forestry Support Activities	10.8

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

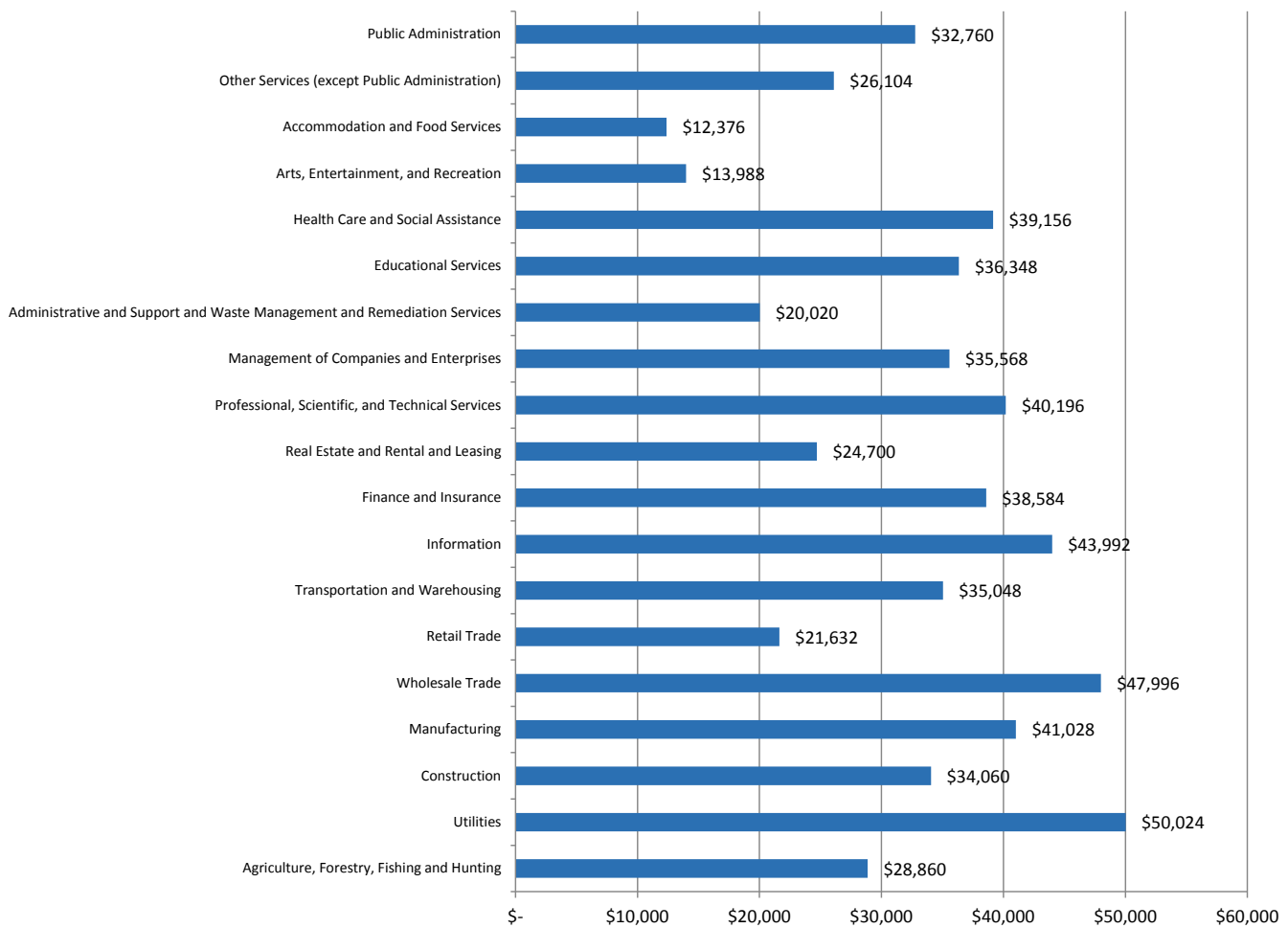
Textile Mills, Forestry and Logging, and several types of Manufacturing top the most concentrated industries in this area with location quotients above 3.0. Textile Mill companies transform a basic fiber into a product like yarn or fabric. The manufacturing sectors that are also concentrated in this area include: Wood Product Manufacturing; Plastics and Rubber; and Furniture and Related Product.

AVERAGE ANNUAL WAGE BY INDUSTRY

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

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

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



Source: BLS, SCDEW, QCEW

OCCUPATIONAL EMPLOYMENT

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

Figure 4 lists occupations, like Registered Nurses, Elementary School Teachers, and General Managers that pay a higher wage. Manufacturing and Healthcare comprise about 40 percent of the employment in the Upper Savannah LWIA, reflected in this list of top occupations: Team Assemblers, Laborers and Material Movers; and Registered Nurses.

Figure 4: Top 20 Occupations with Wages - 2012

Occupational Title	Total Employment	Hourly Average Wage (\$)
All Occupations	107,320	17.88
Cashiers	3,830	8.99
Retail Salespersons	3,760	10.69
Combined Food Preparation and Serving Workers Including Fast Food	2,900	8.56
Team Assemblers	2,440	16.87
Registered Nurses	2,220	28.31
Office Clerks General	1,920	11.35
Laborers and Freight Stock and Material Movers Hand	1,900	13.13
Janitors and Cleaners Except Maids and Housekeeping Cleaners	1,860	10.25
Maintenance and Repair Workers General	1,800	16.76
Customer Service Representatives	1,790	12.50
Secretaries and Administrative Assistants Except Legal Medical and Executive	1,640	13.81
Elementary School Teachers Except Special Education	1,440	22.61
General and Operations Managers	1,360	43.64
Heavy and Tractor-Trailer Truck Drivers	1,330	17.32
First-Line Supervisors of Retail Sales Workers	1,300	17.72
Nursing Assistants	1,300	9.38
Waiters and Waitresses	1,280	8.34
First-Line Supervisors of Office and Administrative Support Workers	1,260	20.80
Bookkeeping Accounting and Auditing Clerks	1,130	14.63
Stock Clerks and Order Fillers	1,130	10.87

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

SKILLS DATA

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

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

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

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

Skillset: LOW
Cashiers
Combined Food Preparation and Serving Workers, Including Fast Food
Construction Laborers
Cooks, Fast Food
Cooks, Institution and Cafeteria
Customer Service Representatives
Electrical and Electronic Equipment Assemblers
Food Preparation Workers
Helpers--Production Workers
Janitors and Cleaners, Except Maids and Housekeeping Cleaners
Laborers and Freight, Stock, and Material Movers, Hand
Landscaping and Groundskeeping Workers
Office Clerks, General
Personal Care Aides
Photographic Process Workers and Processing Machine Operators
Receptionists and Information Clerks
Retail Salespersons
Secretaries and Administrative Assistants, Except Legal, Medical, and Executive
Shipping, Receiving, and Traffic Clerks
Stock Clerks and Order Fillers
Teacher Assistants
Tellers
Waiters and Waitresses
Skillset: MIDDLE
Automotive Service Technicians and Mechanics
Bookkeeping, Accounting, and Auditing Clerks
Carpenters
Computer-Controlled Machine Tool Operators, Metal and Plastic
Correctional Officers and Jailers
First-Line Supervisors of Food Preparation and Serving Workers
First-Line Supervisors of Office and Administrative Support Workers
First-Line Supervisors of Production and Operating Workers
First-Line Supervisors of Retail Sales Workers
General and Operations Managers
Grinding, Lapping, Polishing, and Buffing Machine Tool Setters, Operators, and Tenders, Metal and Plastic
Heavy and Tractor-Trailer Truck Drivers
Inspectors, Testers, Sorters, Samplers, and Weighers
Lathe and Turning Machine Tool Setters, Operators, and Tenders, Metal and Plastic
Licensed Practical and Licensed Vocational Nurses
Machinists
Maintenance and Repair Workers, General
Nursing Assistants
Packaging and Filling Machine Operators and Tenders
Police and Sheriff's Patrol Officers
Registered Nurses
Sales Representatives, Wholesale and Manufacturing, Except Technical and Scientific Products
Team Assemblers
Skillset: HIGH
Accountants and Auditors
Elementary School Teachers, Except Special Education
Middle School Teachers, Except Special and Career/Technical Education
Secondary School Teachers, Except Special and Career/Technical Education

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

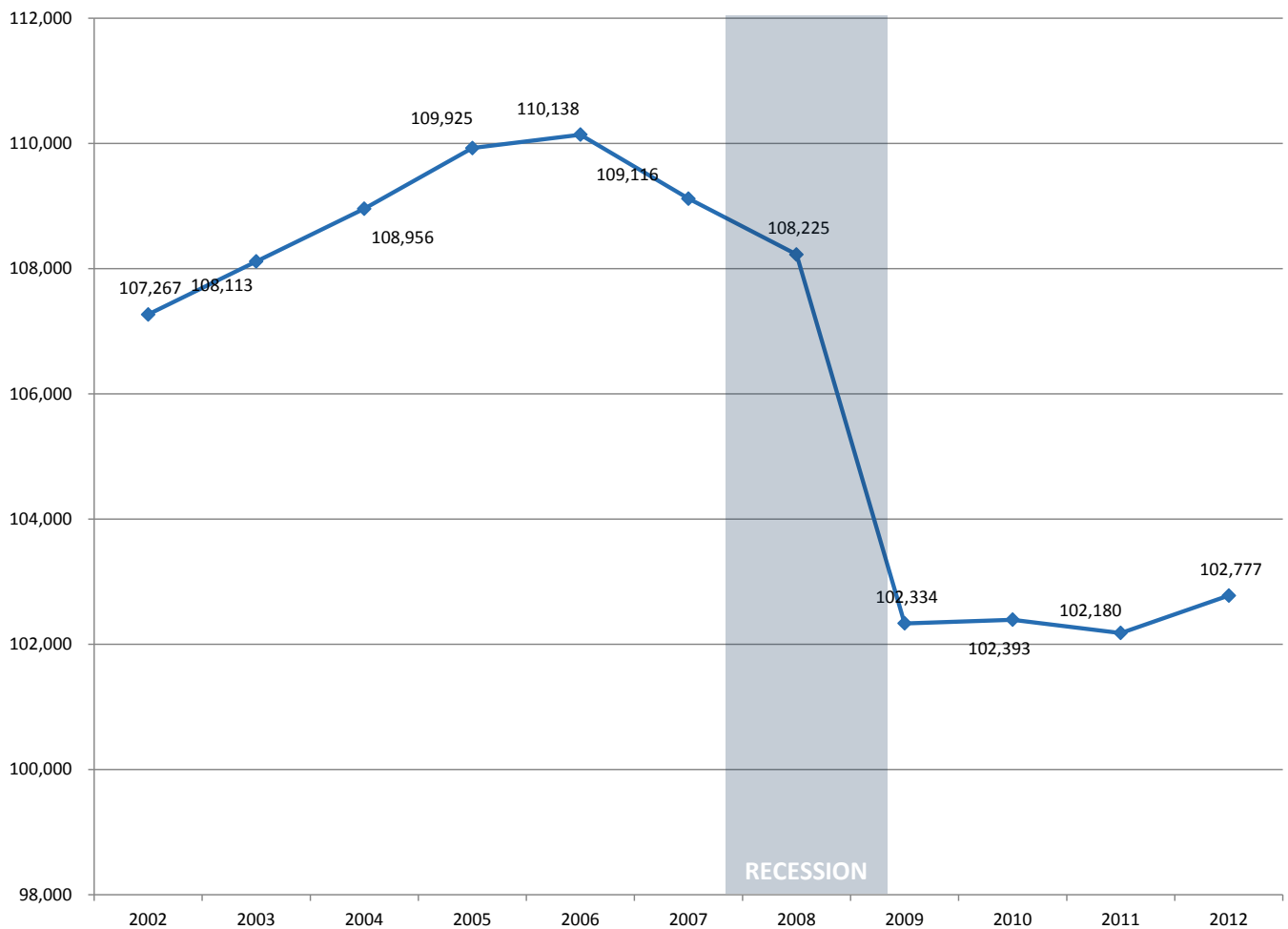
EMPLOYMENT AND UNEMPLOYMENT

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

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

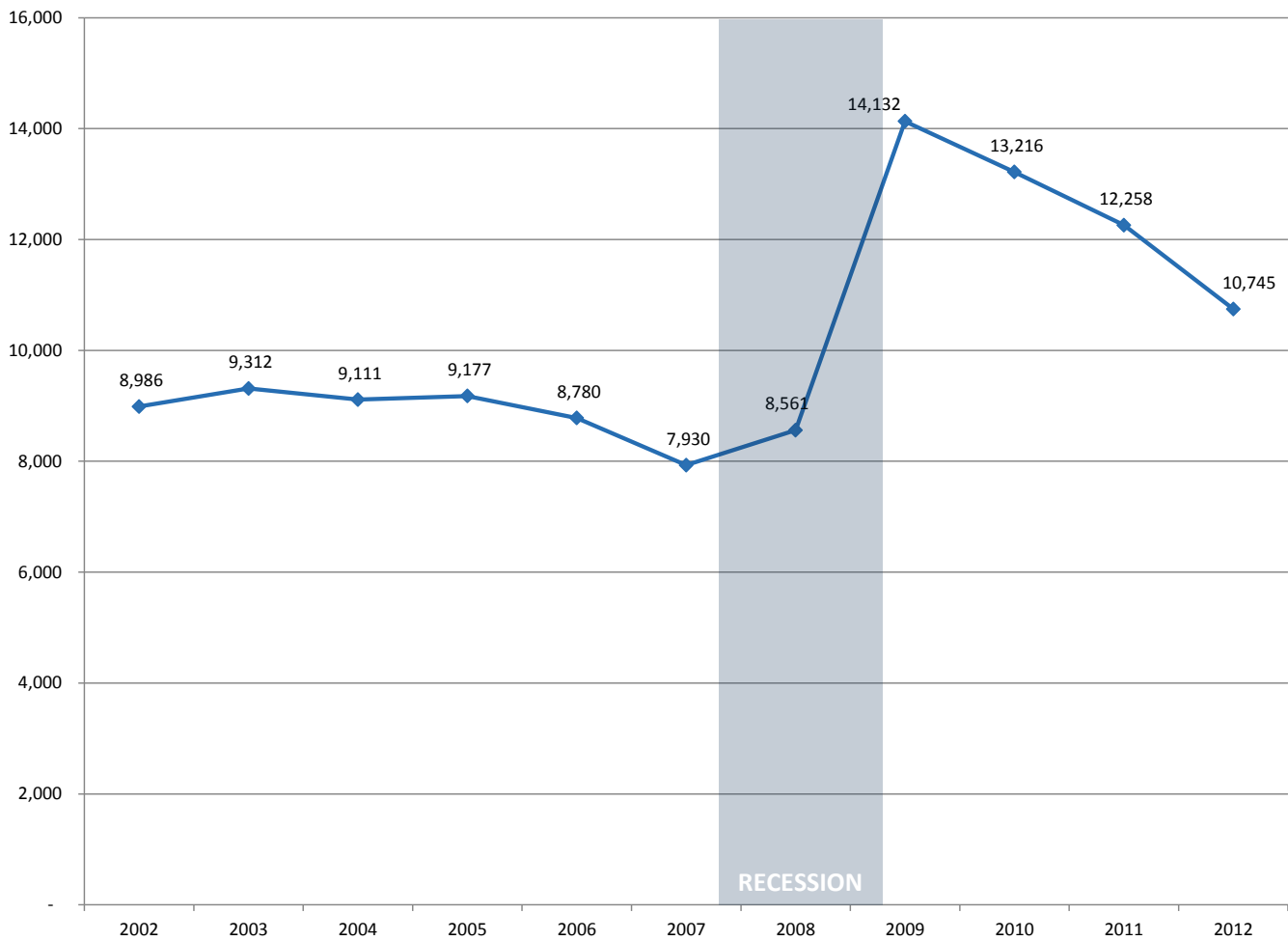
In Figure 6, the recession (officially from December 2007 through June 2009) had a great effect on the labor force. Employment dropped, and unemployment increased by 78 percent.

Figure 6: Employment - 2002-2012



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

Figure 7: Unemployment - 2002-2012

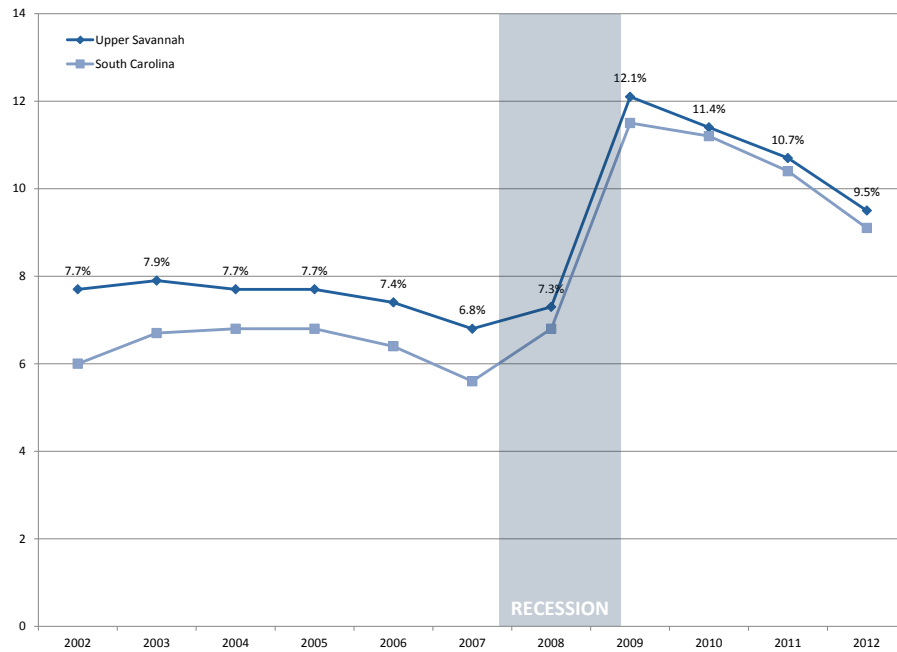


Source: BLS, SCDEW, LAUS

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

Figure 8 shows the annual rates for the Upper Savannah LWIA area and South Carolina. From 2002 Upper Savannah was consistently above the state's rate. During the recession, the Upper Savannah rate almost doubled from 6.8 percent in 2007 to 12.1 percent in 2009.

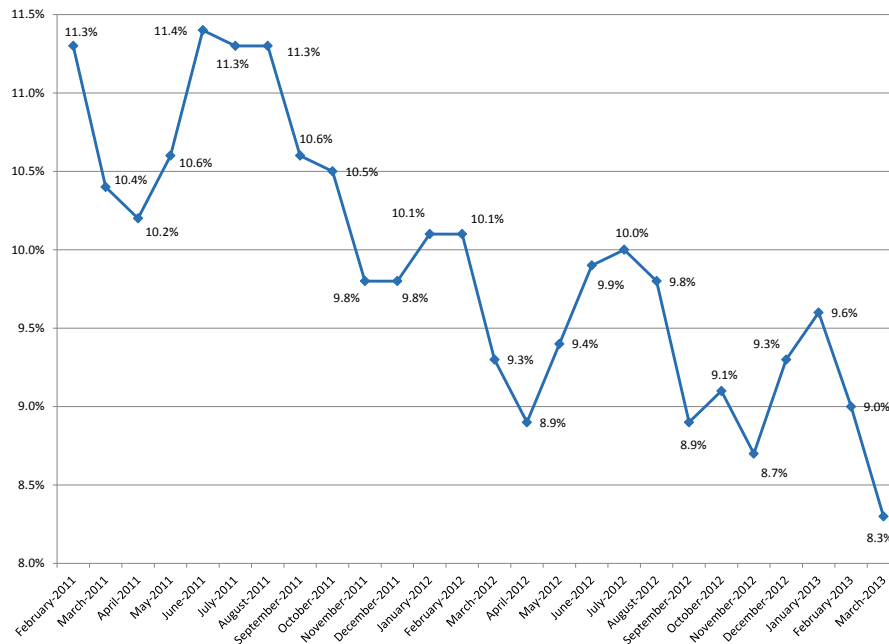
Figure 8: Annual Unemployment - 2002-2012



Source: BLS, SCDEW, LAUS

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

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



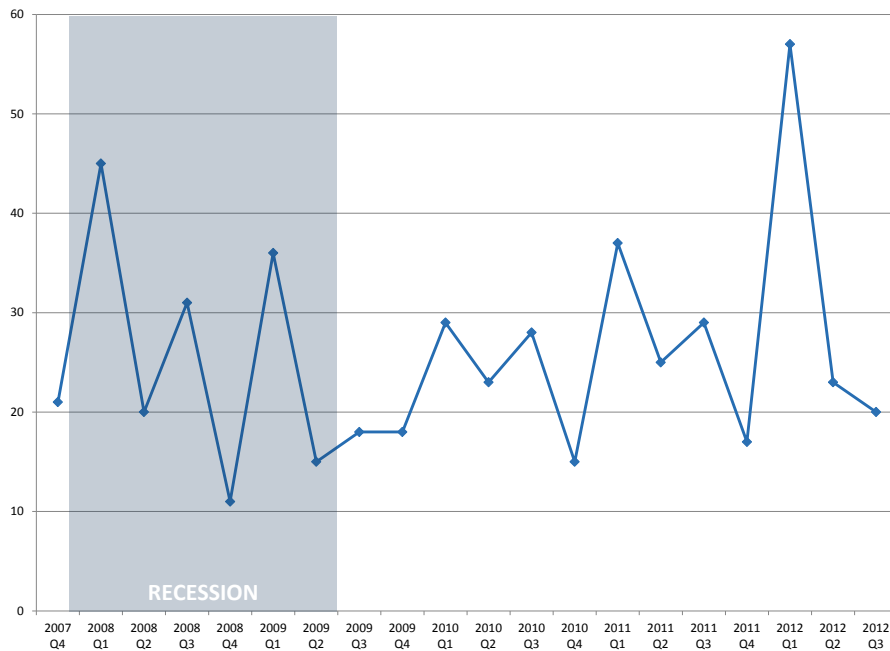
Source: BLS, SCDEW, LAUS

NEW STARTUP FIRMS

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

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

Figure 10: New Startup Firms - 2007-2012



Source: BLS, SCDEW, QCEW

EMPLOYERS BY SIZE OF ESTABLISHMENT

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

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

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

Employees	Upper Savannah	South Carolina
0 to 4	2,074	63,766
5 to 9	794	19,667
10 to 19	524	13,316
20 to 49	370	9,881
50 to 99	150	3,907
100 to 249	96	2,433
250 to 499	27	757
500 to 999	9	328
1000 +	0	264

Source: BLS, SCDEW, QCEW

SUPPLY: WHAT'S OUT THERE?

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

POPULATION BY AGE

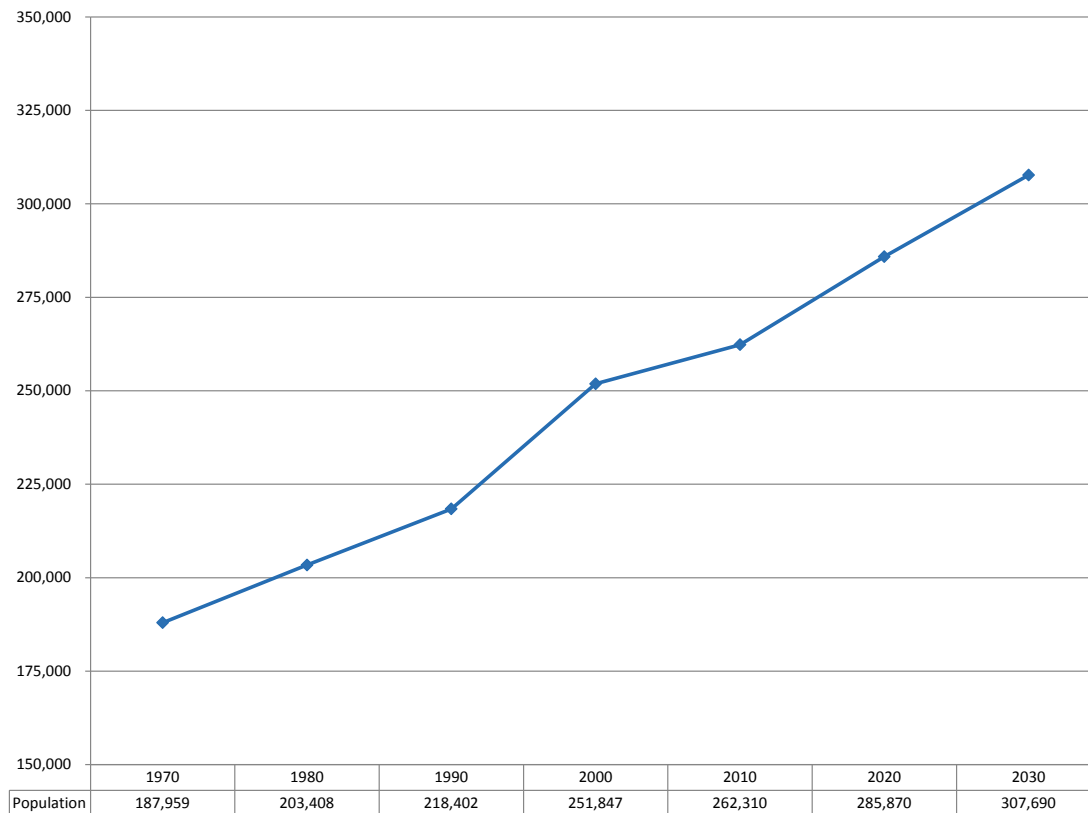
Age distribution in the area is similar to the state and the country with two exceptions. In the 20-39 age cohorts, Upper Savannah has a notably lower proportion of population, and in the 60-79 age cohorts, the LWIA has a markedly higher proportion of population.

Figure 12: Population by Age

Age Range	Upper Savannah	SC	US
0-4	6.3%	6.5%	6.6%
5-9	6.0%	6.4%	6.6%
10-14	6.5%	6.5%	6.7%
15-19	7.2%	7.2%	7.2%
20-24	6.6%	7.2%	7.0%
25-29	5.9%	6.6%	6.8%
30-34	5.7%	6.2%	6.4%
35-39	5.8%	6.5%	6.6%
40-44	7.2%	6.8%	7.0%
45-49	7.2%	7.2%	7.4%
50-54	7.3%	7.0%	7.2%
55-59	6.5%	6.5%	6.3%
60-64	6.7%	5.9%	5.3%
65-69	5.0%	4.5%	3.9%
70-74	3.6%	3.3%	3.0%
75-79	2.9%	2.5%	2.4%
80-84	2.0%	1.7%	1.9%
85 and older	1.9%	1.5%	1.7%

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

Figure 13: Population Projections to 2030



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

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

	Total	Moved From Different State	Moved From Abroad	Moved From Different County	Moved Within Same County
Population 1 year and over	252,358	1.7%	0.3%	4.3%	7.1%
Hispanic or Latino origin (of any race)	12,526	4.7%	3.1%	5.5%	6.2%
White alone, not Hispanic or Latino	159,309	1.7%	0.1%	4.5%	5.7%
Population 25 years and over					
Less than high school graduate	38,047	2.6%	0.7%	3.9%	7.8%
High school graduate/GED	58,705	1.0%	0.2%	3.0%	6.0%
Some college or associate's degree	45,115	1.0%	0.2%	2.7%	4.6%
Bachelor's degree	21,059	2.1%	0.3%	3.4%	3.6%
Graduate or professional degree	9,489	3.2%	0.5%	2.7%	2.7%

Source: US Census Bureau, ACS, SCDEW

After a large jump in population from 1990 to 2000 (up 15.3 percent), the growth of the population of this area slowed down, growing just 4.2 percent over the next 10 years. Growth is projected to increase by less than 1 percent per year to 2030. In Figure 14, in-migration (people moving into Upper Savannah) shows that while over 13 percent of the population changed residence, only 2 percent moved from out of state. Of the residents holding a graduate degree, 3.7 percent came from outside of South Carolina. Nearly 8 percent of Hispanics came from outside of the state and only 1.8 percent of Whites did.

COMMUTING PATTERNS

Most of the workers (65 percent) of Upper Savannah live and work in the LWIA. The tables in Figure 15 show that over 11,000 workers commute in from other areas to work in the LWIA. Greenville County draws a sizeable portion of Upper Savannah County's residents out of the area to work. Nearly 18,000 more employees commute out of the area to work than commute into it every day.

Figure 15: Commuting Patterns - 2010

To Upper Savannah From		From Upper Savannah To	
	11,453		29,363
Greenville County, SC	2,742	Greenville County, SC	8,479
Aiken County, SC	1,724	Lexington County, SC	4,349
Lexington County, SC	1,200	Aiken County, SC	3,893
Anderson County, SC	1,138	Richland County, SC	2,709
		Anderson County, SC	2,273

Source: US Census Bureau, ACS

EDUCATIONAL ATTAINMENT

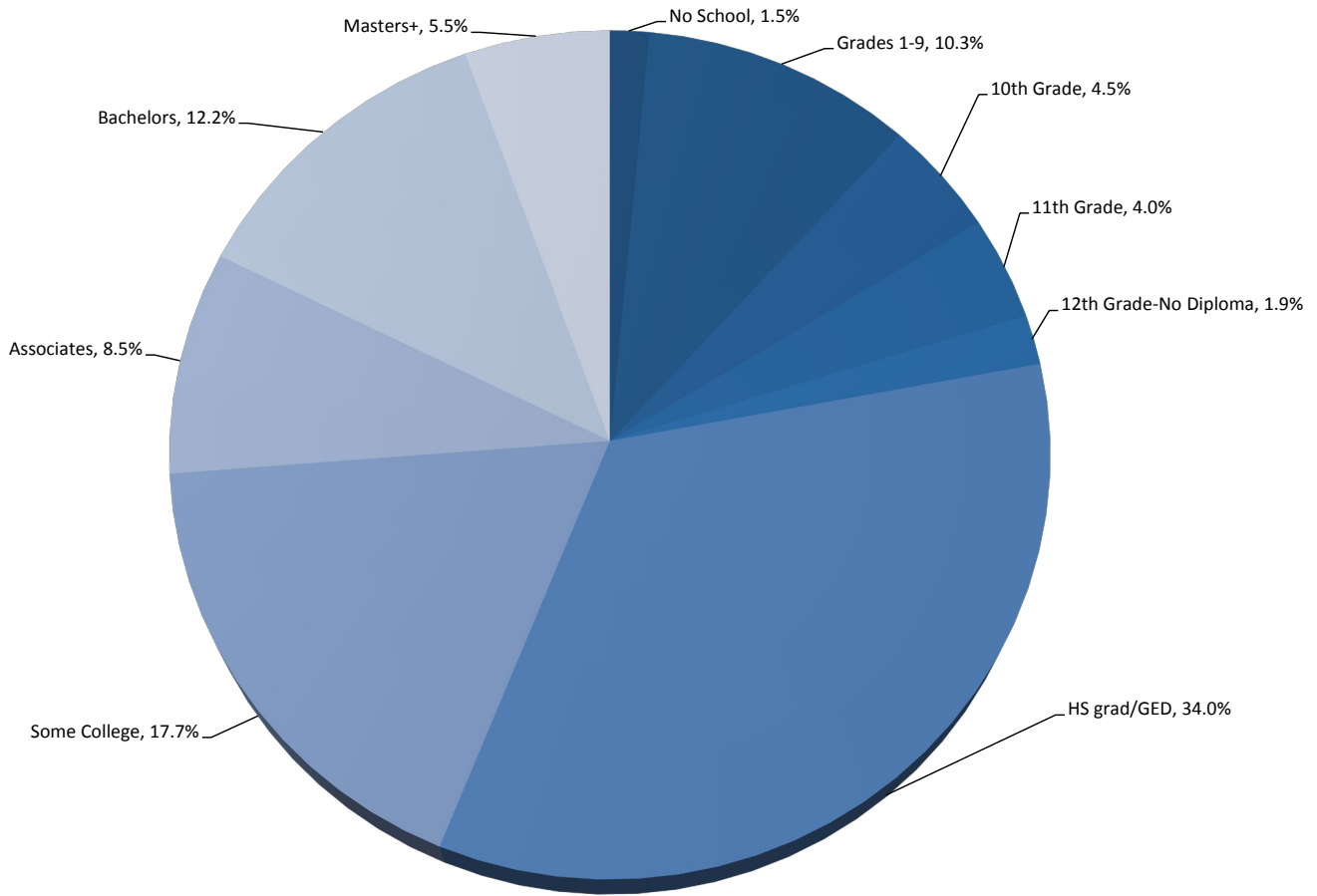
The Upper Savannah LWIA area has a lower percent of residents with college degrees than the state as a whole. The Upper Savannah LWIA has a more than 3 percent higher concentration of residents with a high school diploma or GED than the state. However, the Upper Savannah LWIA has a higher percent of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

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

Education Level	Upper Savannah	SC
No School	1.5	1.1
Grades 1-9	10.3	7.0
10th Grade	4.5	3.3
11th Grade	4.0	3.2
12th Grade-No Diploma	1.9	1.8
HS grad/GED	34.0	30.9
Some College	17.7	20.1
Associates	8.5	8.4
Bachelors	12.2	15.6
Masters+	5.5	8.6

Source: US Census Bureau, ACS, SCDEW

Figure 17: Educational Attainment - Upper Savannah 2011

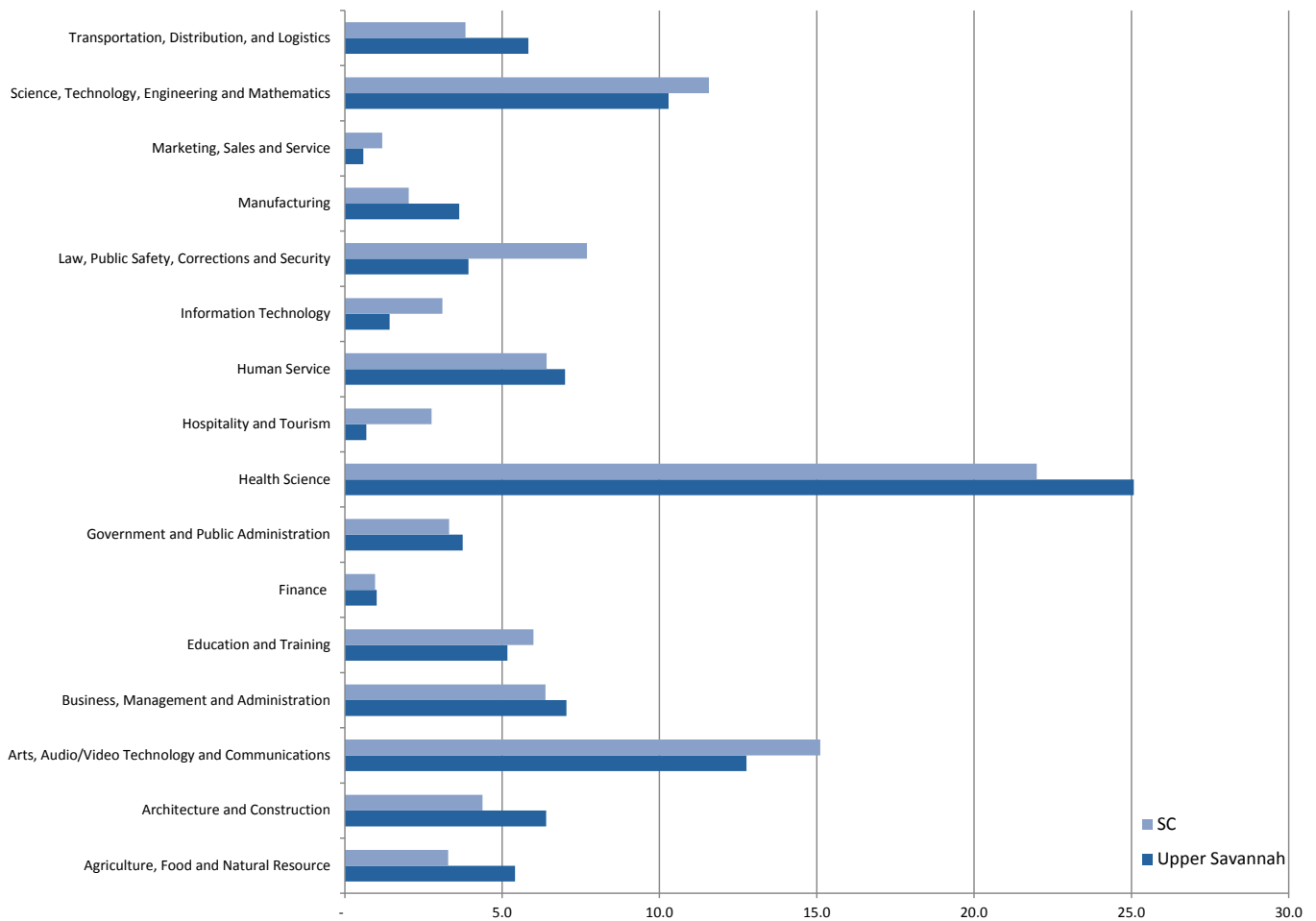


Source: US Census Bureau, ACS, SCDEW

CAREER CLUSTERS SELECTED BY HIGH SCHOOL STUDENTS

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

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



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

Source: SC Department of Education

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

Figure 19: Career Clusters - 2012

Cluster	Upper Savannah	SC
Agriculture, Food and Natural Resource	5.4	3.3
Architecture and Construction	6.4	4.4
Arts, Audio/Video Technology and Communications	12.8	15.1
Business, Management and Administration	7.0	6.4
Education and Training	5.2	6.0
Finance	1.0	1.0
Government and Public Administration	3.7	3.3
Health Science	25.1	22.0
Hospitality and Tourism	0.7	2.8
Human Service	7.0	6.4
Information Technology	1.4	3.1
Law, Public Safety, Corrections and Security	3.9	7.7
Manufacturing	3.6	2.0
Marketing, Sales and Service	0.6	1.2
Science, Technology, Engineering and Mathematics	10.3	11.6
Transportation, Distribution, and Logistics	5.8	3.8

Source: SC Department of Education

DEGREES AWARDED

In higher education, Upper Savannah area colleges and universities have conferred a wide variety of awards. Of the top 20, Business Administration and Liberal Arts are the most popular followed by Registered Nursing. The institutions included in this data are Erskine College, Lander University, Newberry College, Piedmont Technical College, Presbyterian College, and USC-Union at Laurens.

Figure 20: Top 20 Majors in Upper Savannah - 2011

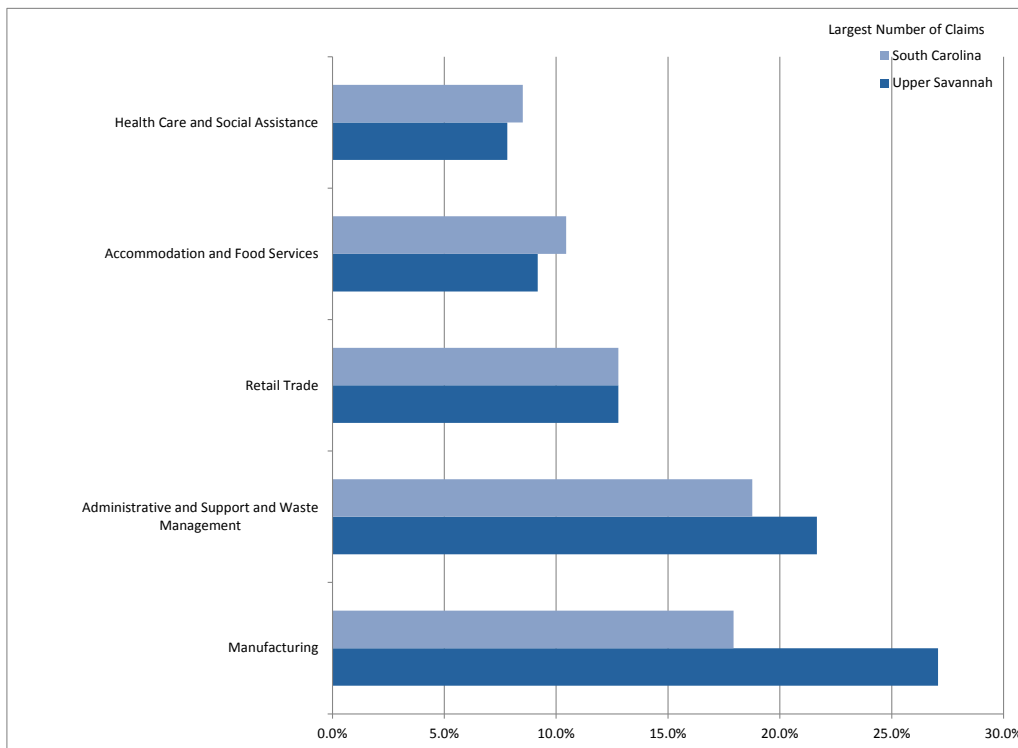
Majors	
Business Administration and Management, General	230
Liberal Arts and Sciences/Liberal Studies	139
Registered Nursing/Registered Nurse	122
Biology/Biological Sciences, General	84
History, General	74
Administrative Assistant and Secretarial Science	71
Business/Commerce, General	67
Nursing - Registered Nurse Training, BSN Generic	55
Construction Engineering Technology/Technician	54
Welding Technology/Welder	51
Licensed Practical/Vocational Nurse Training	50
Psychology, General	49
Social Work	46
Early Childhood Education and Teaching	45
Political Science and Government, General	45
Automobile/Automotive Mechanics Technology	42
Criminal Justice/Safety Studies	42
Sociology	41
Elementary Education and Teaching	40
Electromechanical & Instrumentation & Maintenance	38

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

CHARACTERISTICS OF UI CLAIMS BY OCCUPATION

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

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



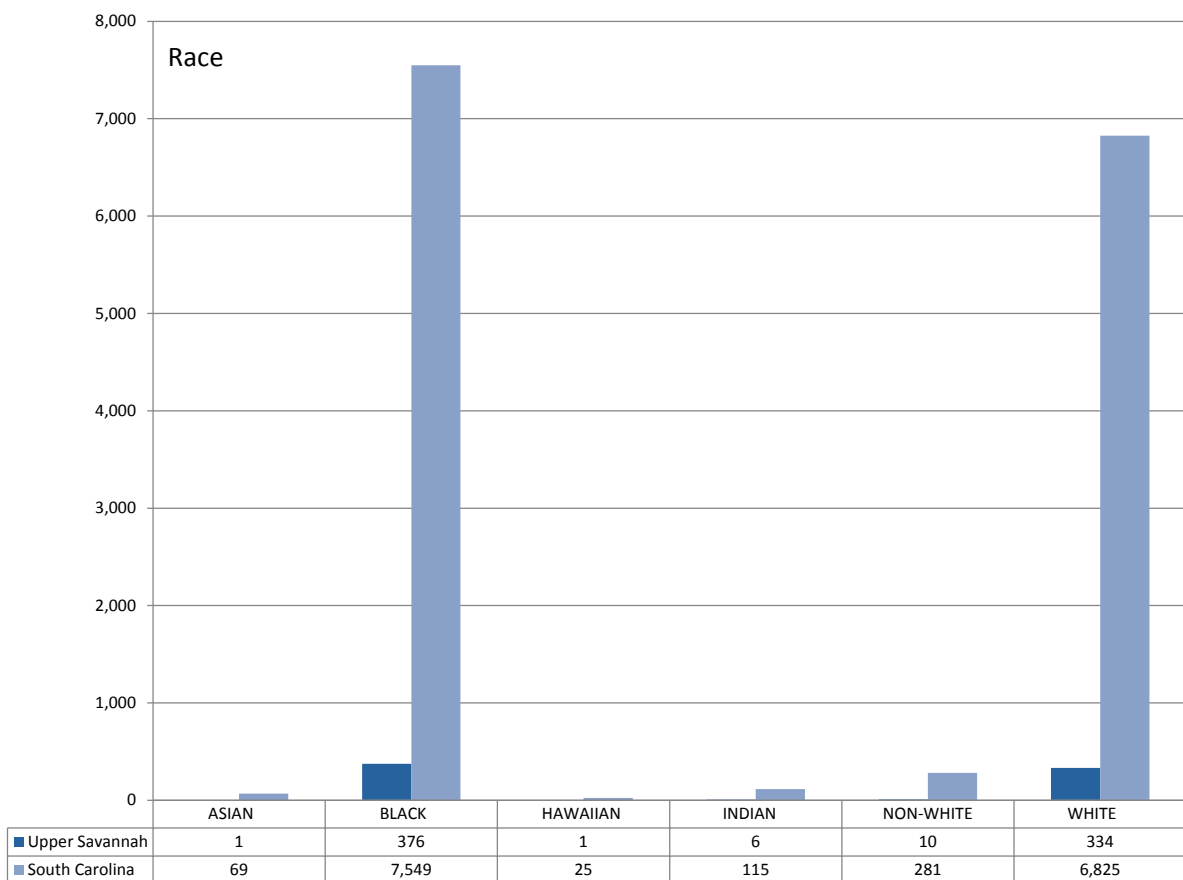
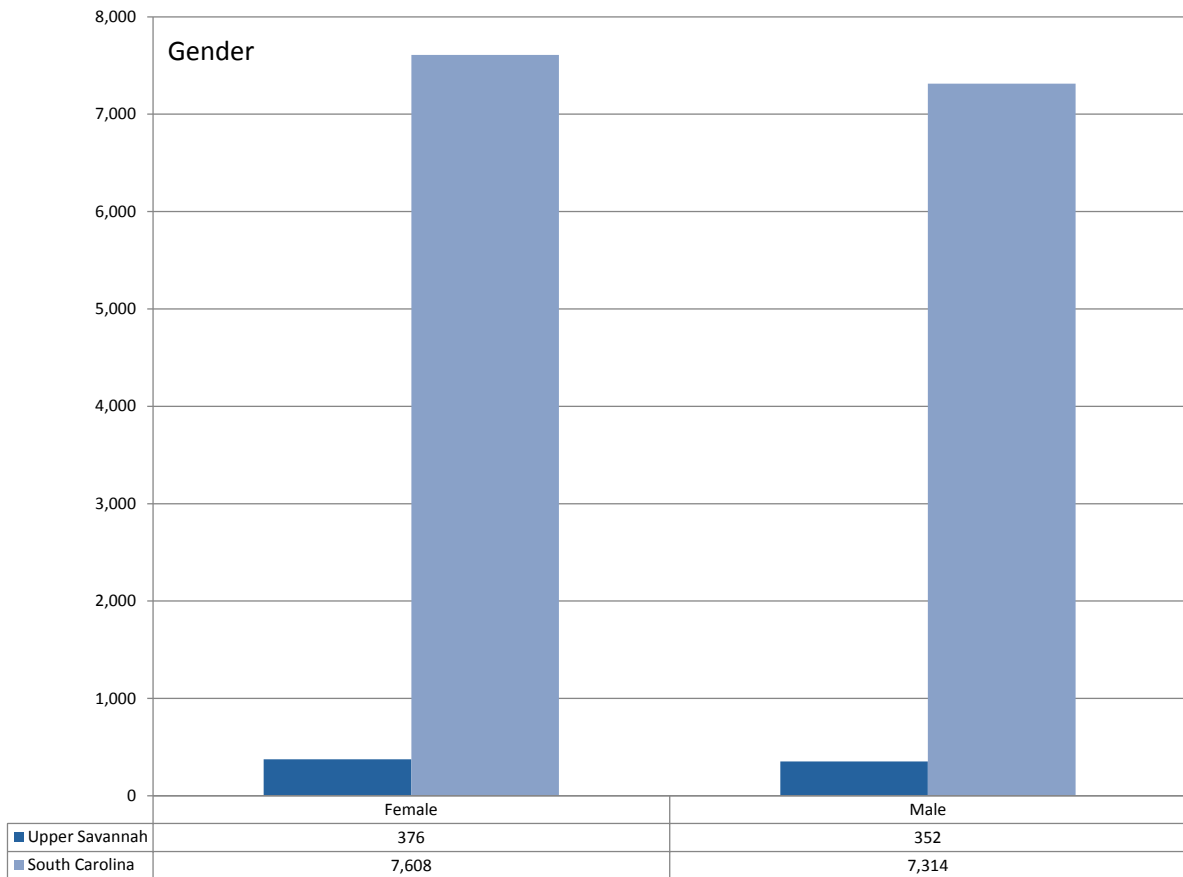
Occupation	Upper Savannah	South Carolina
Manufacturing	180	2,267
Administrative and Support and Waste Management	144	2,373
Retail Trade	85	1,616
Accommodation and Food Services	61	1,321
Health Care and Social Assistance	52	1,076
Construction	31	820
Professional, Scientific, and Technical Services	26	698
Wholesale Trade	16	445
Other Services (except Public Administration)	16	292
Public Administration	12	206
Finance and Insurance	11	300
Transportation and Warehousing	7	414
Educational Services	7	222
Agriculture, Forestry, Fishing and Hunting	5	98
Information	4	122
Real Estate and Rental and Leasing	3	213
Arts, Entertainment, and Recreation	2	94
Mining, Quarrying, and Oil and Gas Extraction	1	10
Utilities	1	22
Management of Companies and Enterprises	1	35

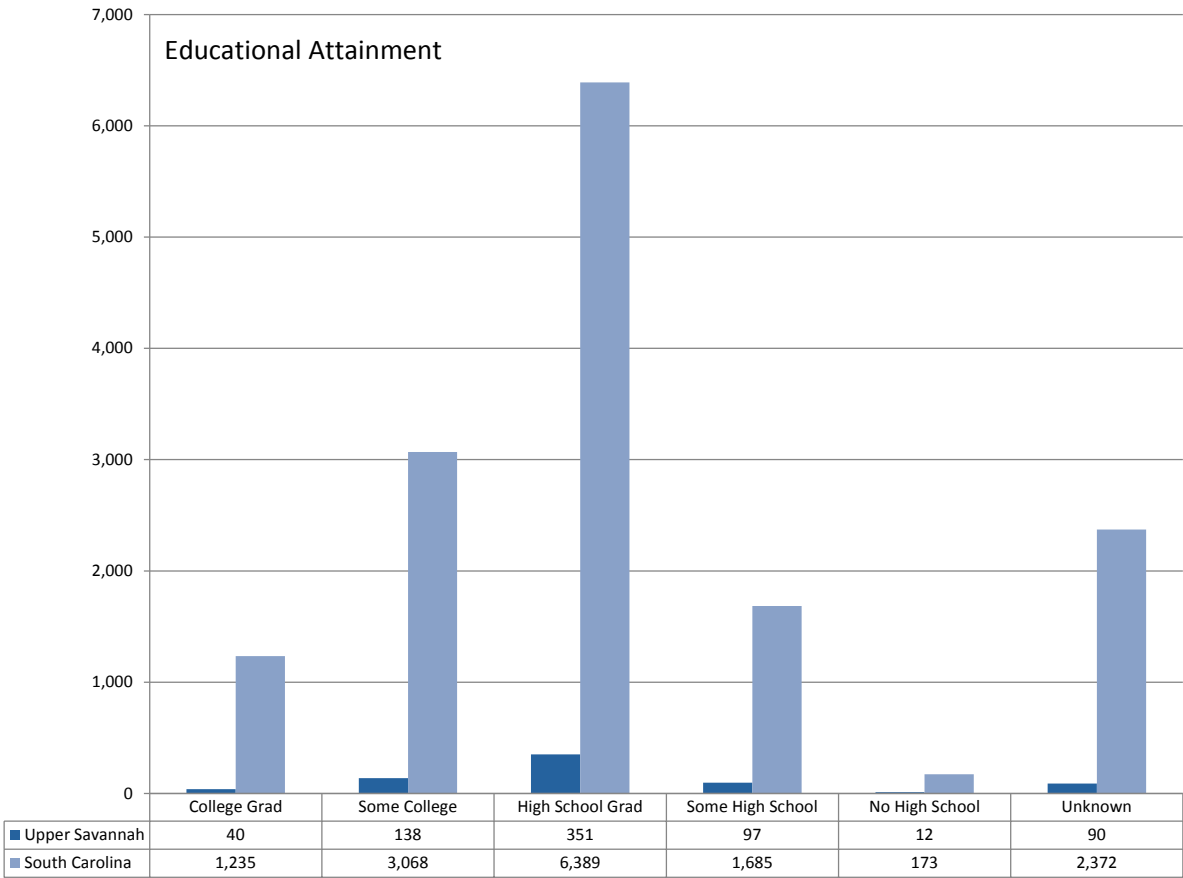
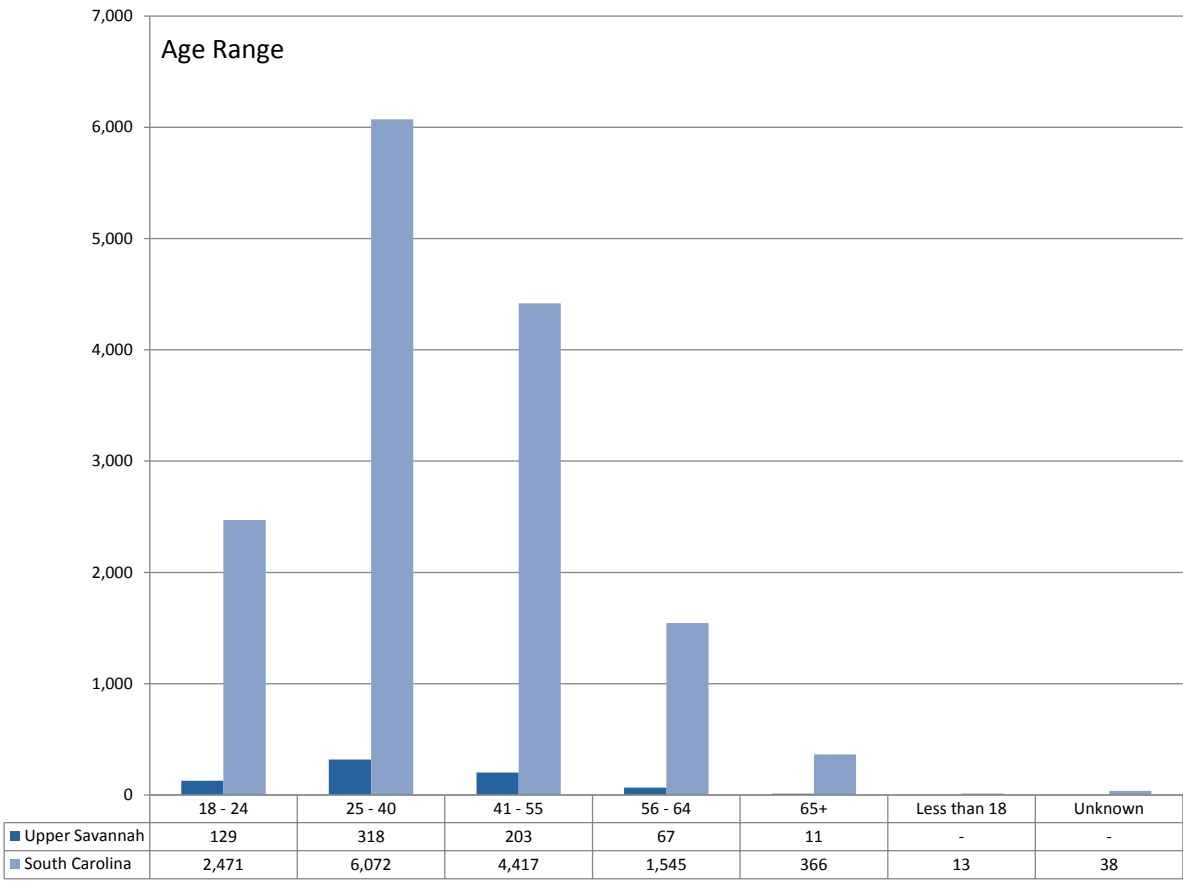
Source: SCDEW

UNEMPLOYMENT INSURANCE CLAIMANT CHARACTERISTICS

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

Figure 22: UI Claimant Characteristics - April 2013





Source: SCDEW

DEMAND: WHAT DO WE NEED?

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

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

ONLINE JOB ADVERTISEMENTS

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

Occupation	# of Job Ads
Healthcare Practitioners and Technical Occupations	362
Architecture and Engineering Occupations	113
Production Occupations	109
Sales and Related Occupations	101
Food Preparation and Serving Related Occupations	77
Management Occupations	75
Installation, Maintenance, and Repair Occupations	71
Office and Administrative Support Occupations	67
Healthcare Support Occupations	59
Transportation and Material Moving Occupations	52
Business and Financial Operations Occupations	39
Computer and Mathematical Occupations	21
Arts, Design, Entertainment, Sports, and Media Occupations	17
Protective Service Occupations	14
Community and Social Services Occupations	13
Education, Training, and Library Occupations	12
Building and Grounds Cleaning and Maintenance Occupations	8
Personal Care and Service Occupations	7
Legal Occupations	6
Life, Physical, and Social Science Occupations	6
Construction and Extraction Occupations	5
Farming, Fishing, and Forestry Occupations	3
Military Specific Occupations	1

Note: A job advertisement may include multiple openings.

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

INDUSTRY PROJECTIONS

The Health Care and Social Assistance industry is projected to have the largest growth from 2008 to 2018, growing by 1,146 jobs or 115 openings/year. This sector includes services, such as ambulatory health care services, hospitals, nursing and residential care facilities, and social assistance services. Administrative and Support and Waste Management and Remediation Services reports the next largest growth with a projected 63 openings/year. This sector includes office administrative services, facilities support services, employment services, services to buildings and dwellings, and waste collection, treatment, and disposal services.

Figure 24: Industry Projections - 2008-2018

Industry	Estimate Employment (2008)	Projected Employment (2018)	Change	Percent Change	Annual Percent Change
Manufacturing	21,776	22,321	545	2.50	0.25
Health Care and Social Assistance	9,911	11,057	1,146	11.56	1.10
Government	8,876	9,098	222	2.50	0.25
Educational Services	7,997	8,535	538	6.73	0.65
Retail Trade	7,683	7,789	106	1.38	0.14
Accommodation and Food Services	4,945	5,180	235	4.75	0.47
Construction	3,493	3,675	182	5.21	0.51
Administrative and Support and Waste Management and Remediation	2,971	3,599	628	21.14	1.94
Agriculture, Forestry, Fishing and Hunting	4,280	3,479	-801	-18.72	-2.05
Other Services (Except Government)	3,213	3,049	-164	-5.10	-0.52
Transportation and Warehousing	2,578	2,567	-11	-0.43	-0.04
Wholesale Trade	1,392	1,964	572	41.09	3.50
Professional, Scientific, and Technical Services	1,268	1,409	141	11.12	1.06
Finance and Insurance	1,390	1,366	-24	-1.73	-0.17
Arts, Entertainment, and Recreation	838	862	24	2.86	0.28
Information	725	828	103	14.21	1.34
Real Estate and Rental and Leasing	390	442	52	13.33	1.26
Management of Companies and Enterprises	281	303	22	7.83	0.76
Utilities	260	224	-36	-13.85	-1.48

Source: BLS, SCDEW, QCEW, WI

OCCUPATIONAL PROJECTIONS

Many of the occupations projected to have numerous openings between 2008 and 2018 in this area are jobs that have high turnover due to low wages. Occupations like Slaughterers and Meat Packers and Taxi Drivers and Chauffeurs do not require extensive education, therefore the pay is low. The need for increased health services (for the aging Baby Boomers) puts Registered Nurses at the top of the projections list as well as other healthcare-related jobs, such as Pharmacists and Pharmacy Technicians, as shown in Figure 25.

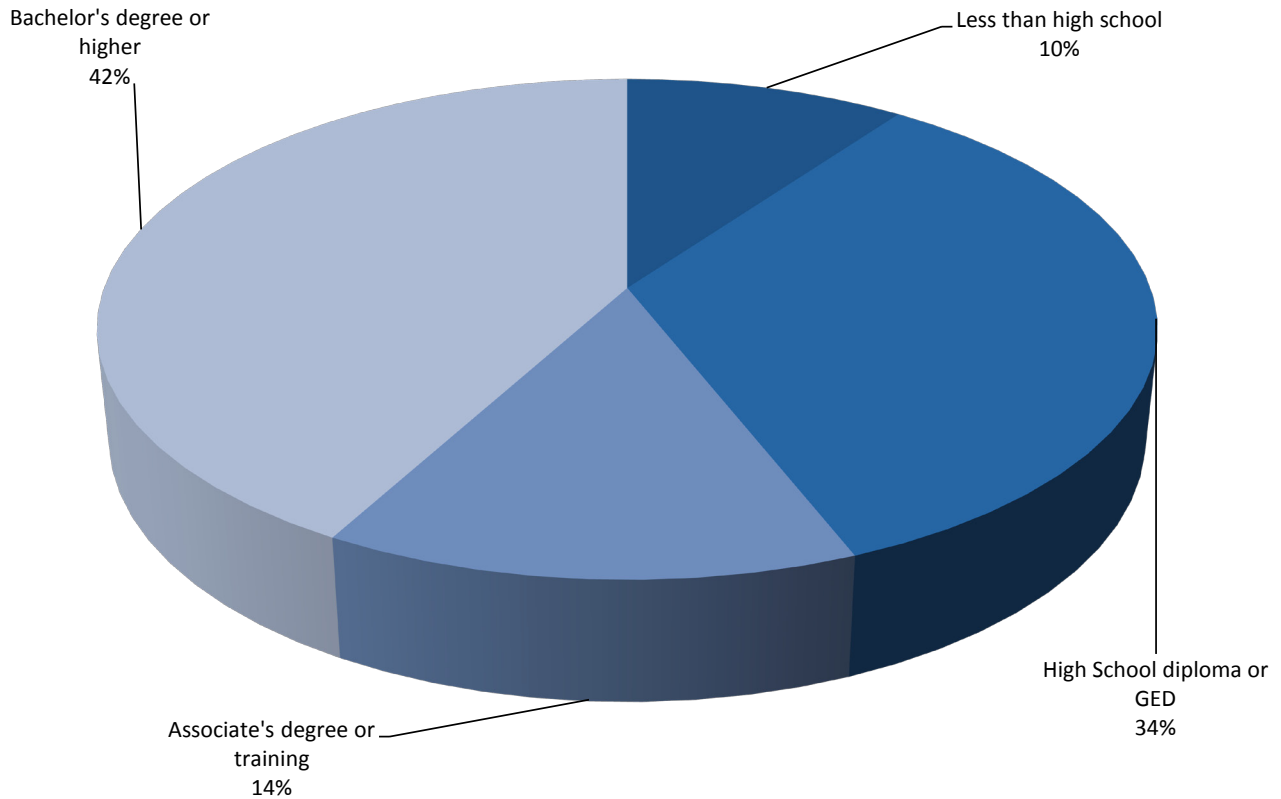
Figure 25: Growing Occupations - 2008-2018

Occupation	Estimated Employment (2008)	Projected Employment (2018)
Registered Nurses	1,427	1,725
Slaughterers and Meat Packers	793	1,084
Medical Assistants	310	363
Pharmacy Technicians	251	331
Pharmacists	220	267
Woodworking Machine Setters, Operators, and Tender	206	259
Sawing Machine Setters, Operators & Tenders, Wood	142	170
Coating, Painting, and Spraying Machine Setters	133	158
Surgical Technologists	97	122
Electrical Engineers	100	122
Compliance Officers, Except Agriculture, Construction	88	107
Public Relations Specialists	71	87
Physical Therapist Assistants	65	79
Pipelayers	58	70
Taxi Drivers and Chauffeurs	39	49
Computer and Information Systems Managers	36	43
Athletic Trainers	30	38
Advertising Sales Agents	32	38
Log Graders and Scalers	22	32
Occupational Health and Safety Specialists	16	19

Source: BLS, SCDEW, OES, WI

Of the top 50 projected growing occupations by percent change, 17 require a high school diploma or GED, five require less than a high school diploma or GED, 21 require a bachelor's degree, seven have an associate's degree or require some kind of postsecondary training. Each of the five requiring less than a high school diploma or GED does require at least short-term on-the-job training (OJT), which is defined by the US Department of Labor as less than one month.

Figure 26: Education for Top 50 Projected Occupations



Source: BLS, SCDEW, OES, WI

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

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

Occupation
Child Care Workers
Data Entry Keyers
Electrical and Electronics Repairers
Fallers
File Clerks
Helpers--Production Workers
Human Resources Assistants, Except Payroll and Time
Industrial Engineering Technicians
Inspectors, Testers, Sorters, Samplers & Weighers
Maintenance Workers, Machinery
Meter Readers, Utilities
Order Clerks
Packers and Packagers, Hand
Payroll and Timekeeping Clerks
Postal Service Clerks
Postal Service Mail Sorters, Processors
Postmasters and Mail Superintendents
Roofers
Switchboard Operators, Including Answering Service
Textile Knitting and Weaving Machine Setters, Operators

Source: BLS, SCDEW, OES, WI

SKILLS OF PROJECTED OCCUPATIONS

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

Figure 28: Skill Levels

Low	9
Middle	20
High	21

Source: BLS, SCDEW, OES, WI

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

WORKFORCE CHALLENGES

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

Supply Findings

With the population growing slowly until 2030 and a smaller-than-the-state share of 20-39 year olds, this area looks to have a challenge in having a supply of workers. In addition, in-migration from other states/countries adds residents primarily at the bottom end of the educational spectrum, though some are concentrated at the upper end. This is evident in the overall educational attainment of residents 25 years and older: a higher percent of residents with less than a high school diploma than the state as a whole. Upper Savannah LWIA also exceeds the state with a higher proportion of its residents having a high school diploma/GED or associate's degree.

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

Demand Findings

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

Figure 29: Comparison of Supply and Demand

	Demand		Supply	
	Top online ads	Projected Occupations	Degrees Earned	Career Clusters Selected
Agriculture, Food and Natural Resource	1.7	4.0	1.0	5.4
Architecture and Construction	5.4	5.9	4.4	6.4
Arts, Audio/Video Technology and Communications	1.1	0.8	3.8	12.8
Business, Management and Administration	12.1	14.5	17.6	7.0
Education and Training	1.5	3.1	17.4	5.2
Finance	3.2	1.6	0.0	1.0
Government and Public Administration	0.2	0.3	2.0	3.7
Health Science	31.7	11.6	20.6	25.1
Hospitality and Tourism	3.5	13.2	0.0	0.7
Human Service	2.9	5.6	8.7	7.0
Information Technology	4.0	0.7	2.2	1.4
Law, Public Safety, Corrections and Security	1.1	3.2	1.9	3.9
Manufacturing	5.1	14.6	7.8	3.6
Marketing, Sales and Service	15.3	12.4	0.0	0.6
Science, Technology, Engineering and Mathematics	5.2	1.8	10.5	10.3
Transportation, Distribution, and Logistics	5.9	6.7	1.9	5.8

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

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

- The short- and long-term employment demand in Marketing, Sales and Service will not be met by today's graduates or tomorrow's students.
- There are many post-secondary degrees being earned in Business, Management and Administration; Education and Training; Human Service; and Science, Technology, Engineering and Mathematics for which there is no demand. Possibly the glut in Business graduates could help supply the need for workers in Marketing, Sales and Service and Finance.
- The short-term demand for workers in Transportation, Distribution, and Logistics is not being met by today's graduates.
- Demand for Health Science workers is greater than supply of degree-holders in the short-term, but just the opposite situation exists in the long-term as eighth graders chose the field at a rate of more than double the projection.
- There is an overabundance of Arts, Audio/Video Technology and Communication and STEM clusters selected by students that will far outpace long-term demand.
- The long-term demand for workers in Business, Management and Administration; Hospitality and Tourism; and Manufacturing is not projected to be met by today's students.

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

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

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

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

CONCLUSION

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

The data shows that:

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

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