

WACCAMAW LWIA WORKFORCE REPORT 2012



The *Waccamaw 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.

The LMI Department produced this report under the leadership of:

Executive Director - Cheryl Stanton
Interim Deputy Assistant Executive Director - Kerry Paul
Labor Market Information Director - Brenda Lisbon

South Carolina Department of Employment and Workforce
1550 Gadsden Street
Columbia, South Carolina 29201
(803) 737-2660
www.dew.sc.gov
www.scworkforceinfo.com



TABLE OF CONTENTS

EXECUTIVE SUMMARY	VI
INTRODUCTION	VII
ECONOMIC DISCUSSION: A CURRENT PICTURE OF THE WORKFORCE	1
EMPLOYMENT BY INDUSTRY	1
LOCATION QUOTIENT	1
AVERAGE ANNUAL WAGE BY INDUSTRY	2
OCCUPATIONAL EMPLOYMENT	3
SKILLS DATA	4
EMPLOYMENT AND UNEMPLOYMENT	6
NEW STARTUP FIRMS	8
EMPLOYERS BY SIZE OF ESTABLISHMENT	9
SUPPLY: WHAT'S OUT THERE?	10
POPULATION BY AGE	10
POPULATION CHANGE AND MIGRATION	11
COMMUTING PATTERNS	12
EDUCATIONAL ATTAINMENT	12
CAREER CLUSTERS SELECTED BY HIGH SCHOOL STUDENTS	13
DEGREES AWARDED	15
CHARACTERISTICS OF UI CLAIMS BY OCCUPATION	16
UNEMPLOYMENT INSURANCE CLAIMANT CHARACTERISTICS	17
DEMAND: WHAT DO WE NEED?	20
ONLINE JOB ADVERTISEMENTS	20
INDUSTRY PROJECTIONS	20
OCCUPATIONAL PROJECTIONS	21
SKILLS OF PROJECTED OCCUPATIONS	24
WORKFORCE CHALLENGES	25
CONCLUSION	27

TABLE OF FIGURES

FIGURE 1: WACCAMAW LWIA EMPLOYMENT BY INDUSTRY - 3RD QUARTER 2012	1
FIGURE 2: NOTABLE WACCAMAW LWIA LOCATION QUOTIENTS - 2011	2
FIGURE 3: ANNUAL AVERAGE WAGE BY INDUSTRY - 3RD QUARTER 2012.....	3
FIGURE 4: TOP 20 OCCUPATIONS WITH WAGES - 2012.....	4
FIGURE 5: TOP OCCUPATIONS BY SKILL CLASSIFICATION - WACCAMAW 2012.....	5
FIGURE 6: EMPLOYMENT - 2002-2012.....	6
FIGURE 7: UNEMPLOYMENT - 2002-2012	7
FIGURE 8: ANNUAL UNEMPLOYMENT - 2002-2012	8
FIGURE 9: MONTHLY UNEMPLOYMENT RATE - MARCH 2011-APRIL 2013.....	8
FIGURE 10: NEW STARTUP FIRMS - 2007-2012.....	9
FIGURE 11: EMPLOYERS BY SIZE OF ESTABLISHMENT - 3RD QUARTER 2012.....	9
FIGURE 12: POPULATION BY AGE	10
FIGURE 13: POPULATION PROJECTIONS TO 2030.....	11
FIGURE 14: POPULATION MIGRATION - 2011 - 5-YEAR ESTIMATE.....	11
FIGURE 15: COMMUTING PATTERNS - 2010.....	12
FIGURE 16: EDUCATIONAL ATTAINMENT - WACCAMAW AND SOUTH CAROLINA 2011.....	12
FIGURE 17: EDUCATIONAL ATTAINMENT - WACCAMAW 2011	13
FIGURE 18: PERCENT OF STUDENTS DECLARING A CAREER CLUSTERS IN WACCAMAW AND SC - 2012	14
FIGURE 19: CAREER CLUSTERS - 2012.....	15
FIGURE 20: TOP 20 MAJORS IN WACCAMAW - 2011	16
FIGURE 21: CHARACTERISTICS OF UI CLAIMS BY OCCUPATION - APRIL 2013.....	17
FIGURE 22: UI CLAIMANT CHARACTERISTICS - APRIL 2013.....	18
FIGURE 23: WACCAMAW HWOL - APRIL 2013 BY MAJOR GROUP	20
FIGURE 24: INDUSTRY PROJECTIONS - 2008-2018	21
FIGURE 25: GROWING OCCUPATIONS - 2008-2018.....	22
FIGURE 26: EDUCATION FOR TOP 50 PROJECTED OCCUPATIONS	23
FIGURE 27: TOP 20 PROJECTED DECLINING OCCUPATIONS IN WACCAMAW - 2008-2018.....	24
FIGURE 28: SKILL LEVELS.....	24
FIGURE 29: COMPARISON OF SUPPLY AND DEMAND.....	25

EXECUTIVE SUMMARY

The employment leaders for Waccamaw Local Workforce Investment Area (LWIA) are Accommodation and Food Services and Retail Trade. Employment growth is anticipated by 2018 in these industries as well. The highest wages are paid by the Utilities and Mining industries.

The area's population grew by 25 percent since 2000, but it has fewer residents aged 20 to 39 than the state's average.

Employment is rising, and unemployment is declining. Waccamaw has historically had unemployment rates about the same as the state but exceeded the state's rates during and after the recession. Employment is concentrated in the Grand Strand and Myrtle Beach area, and nearly 2,700 more people enter the area for work than leave it every day. Accommodation and Food Services is the largest industry represented in unemployment claims.

Waccamaw has a higher proportion of residents with a high school diploma to associate's degree education than the state does as a whole. For projected future growing jobs, 4 percent require no diploma, 32 percent require a diploma, 24 percent require an associate's degree or training, and 40 percent require a bachelor's degree or higher.

Waccamaw businesses desire a trained workforce for the tasks demanded. The area relies heavily on the seasonal business that tourism brings in warmer months, but efforts are being made to bring in more diverse and larger companies. A challenge for the area 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.

Waccamaw LWIA has several factors working in its favor. It has the Grand Strand and Myrtle Beach, technical and traditional colleges available for students and workers, and it has access to waterways and shipping. Warm weather brings another opportunity for a great tourism cycle that will balloon coffers for the lean times.

The patterns and trends described in this report offer cause for both optimism and concern. Waccamaw 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 Waccamaw Local Workforce Investment Area is composed of Georgetown, Horry, and Williamsburg counties. Waccamaw is located in the eastern part of the state and borders the Atlantic Ocean, featuring forests, swamps, and beaches. The Lumber, Great Pee Dee, Little Pee Dee, Santee, and Waccamaw Rivers make their way through the area. Economic history includes agriculture (rice, indigo, and tobacco), naval stores, and lumber; modern industries focus on tourism, lumber, and manufacturing.

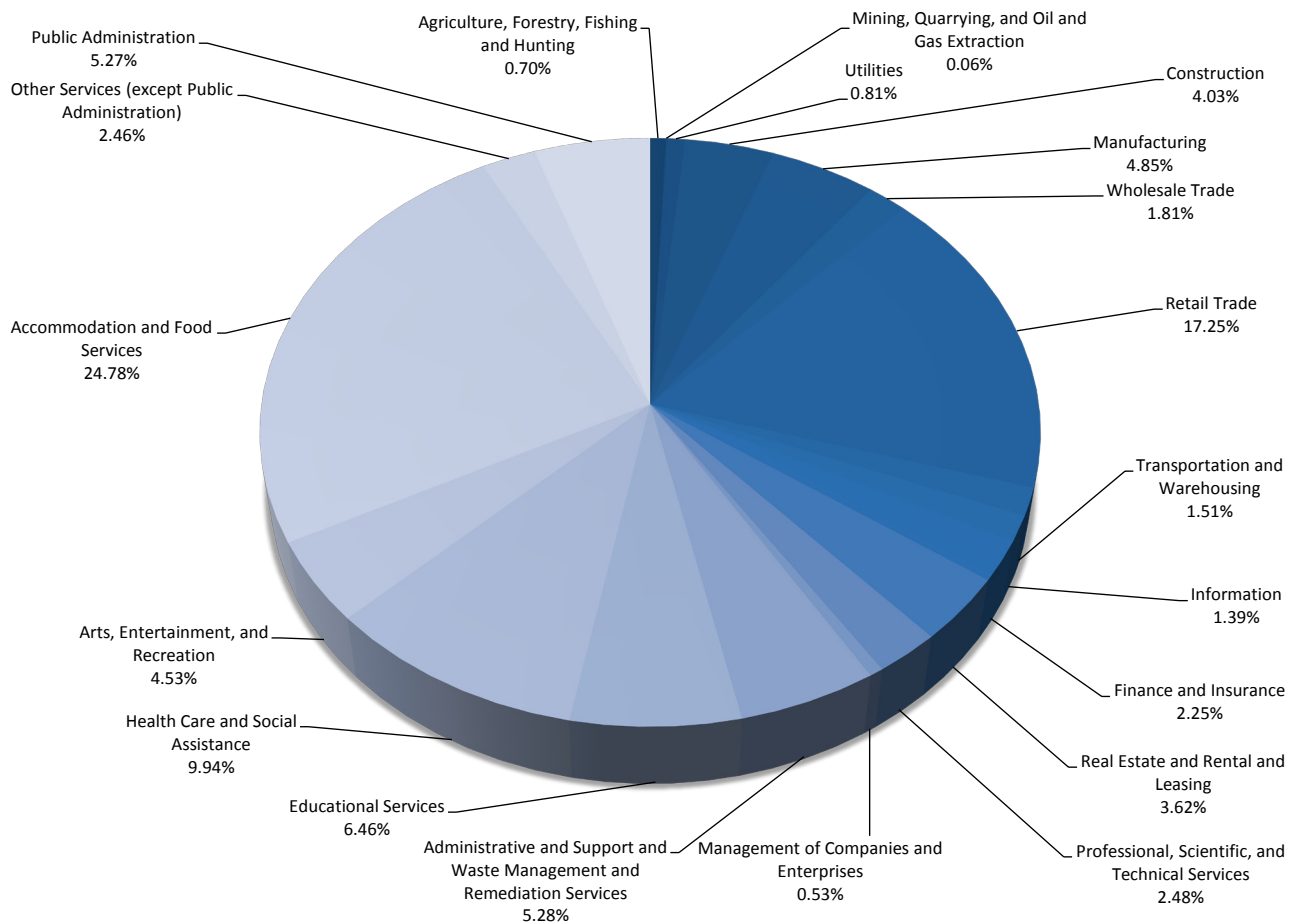
The economic changes this year in Waccamaw demonstrate the shifting needs of employers and employees. Cultivating an understanding of the workforce allows all three counties to respond to anticipated future needs. Analyses help to identify the gap between what the workforce has in the way of talent and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

The purpose of the Waccamaw Workforce Report is to present a comprehensive view of the status of Waccamaw's economy and workforce. The report includes an analysis of Waccamaw'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: Waccamaw LWIA Employment By Industry - 3rd Quarter 2012



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

Accommodation and Food Services and Retail Trade are the top two industries employing workers in Waccamaw. 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 Waccamaw resident was \$30,476, which was an increase of 38 percent from 2000.¹ Economic growth has taken place in the past decade to enhance the 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 Waccamaw LWIA Location Quotients - 2011

Industry and Sectors	Location Quotient
<i>Georgetown County</i>	
Forestry and Logging	38.3
Primary Metal Manufacturing	4.2
Building Construction	3.8
<i>Horry County</i>	
Accommodation	6.0
Amusements, Gambling, and Recreation	3.2
Clothing and Clothing Accessories Stores	3.1
<i>Williamsburg County</i>	
Forestry and Logging	25.4
Plastic and Rubber Products Manufacturing	9.4
Apparel Manufacturing	7.9

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

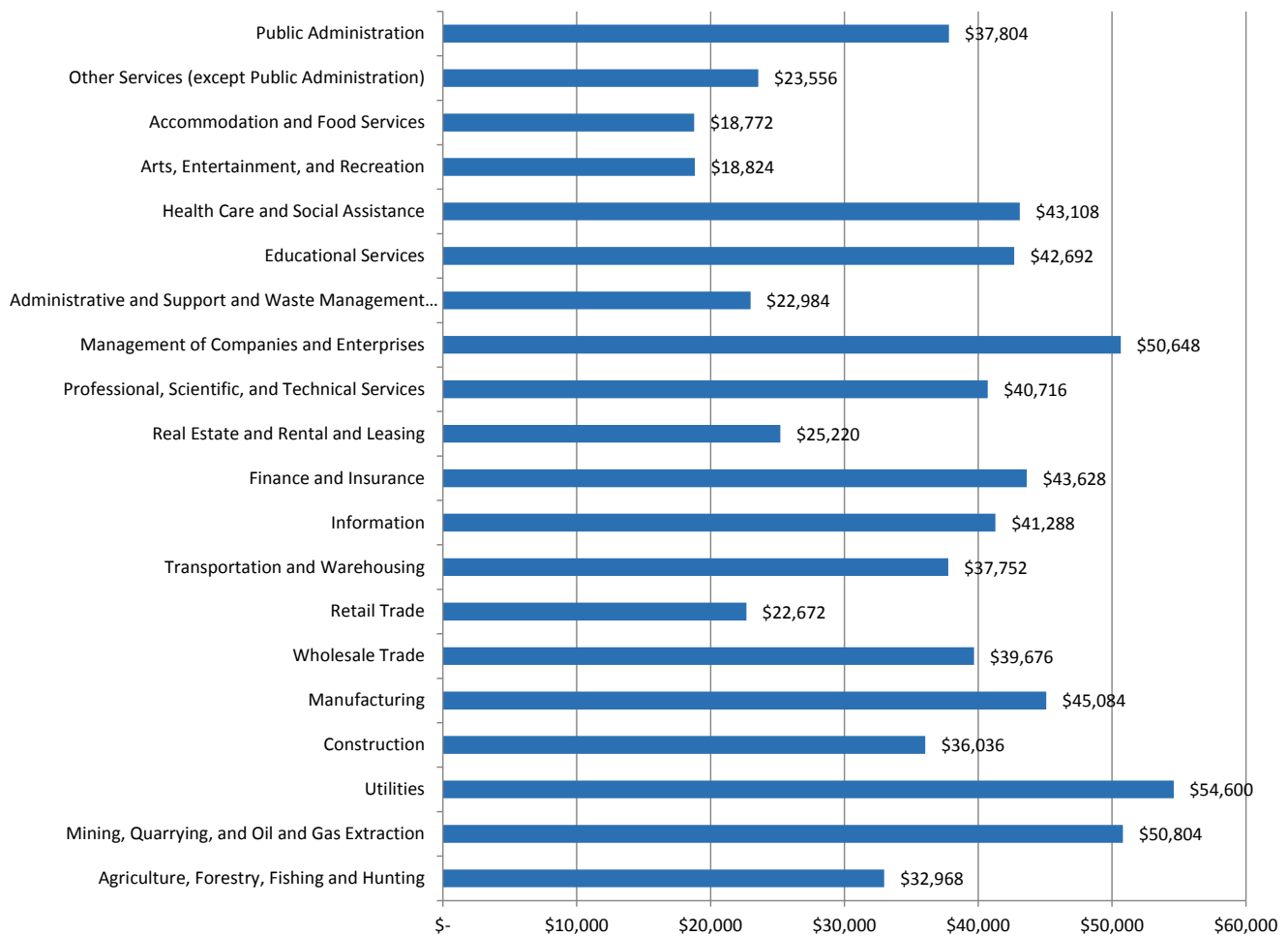
The Forestry and Logging industry tops the most concentrated sector in this area with location quotients over 25 in Georgetown and Williamsburg counties. Manufacturing industries located in those two counties include Apparel, Primary Metal, and Plastics and Rubber Products. The Accommodation sector is the most concentrated in Horry County followed by Amusements, Gambling, and Recreation and Clothing and Clothing Accessories Stores.

AVERAGE ANNUAL WAGE BY INDUSTRY

The annual wages for the Utilities sector employees are the highest for any industry. Utility workers have a wide range of education (high school diploma to PhD) and tend to stay in their jobs for a very long time, which increases the average wage as small raises accumulate over time. Mining, Quarrying, and Oil and Gas Extraction workers are the second highest paid group of employees in the area, followed by the Management of Companies and Enterprises group.

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

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



Source: BLS, SCDEW, QCEW

OCCUPATIONAL EMPLOYMENT

When examining the current occupational employment in the area, one can observe that some of the top 20 occupations are low-skill, low-pay jobs. These jobs, like Cashiers, Waiters and Waitresses, and 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 First-Line Supervisors, that pay a higher wage. With Accommodation and Food Services; Retail Trade; and Health Care and Social Assistance sectors comprising over half of the employment in Waccamaw, the positions of Food Preparers and Servers; Maids and Housekeeping Cleaners; Retail Salespersons; and Registered Nurses, not surprisingly, are listed among the top occupations.

Figure 4: Top 20 Occupations with Wages - 2012

Occupational Title	Total Employment	Hourly Average Wage (\$)
All Occupations	110,610	15.25
Retail Salespersons	7,330	10.62
Cashiers	5,660	8.78
Waiters and Waitresses	5,170	8.70
Maids and Housekeeping Cleaners	3,930	8.62
Combined Food Preparation and Serving Workers, Including Fast Food	2,630	8.47
Cooks, Restaurant	2,350	9.23
Landscaping and Groundskeeping Workers	2,160	9.64
First-Line Supervisors of Retail Sales Workers	1,960	18.05
Stock Clerks and Order Fillers	1,900	10.15
Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	1,840	14.08
Customer Service Representatives	1,810	12.05
Office Clerks, General	1,800	12.43
Janitors and Cleaners, Except Maids and Housekeeping Cleaners	1,790	10.89
Registered Nurses	1,720	27.45
Maintenance and Repair Workers, General	1,590	13.28
General and Operations Managers	1,480	41.73
Bookkeeping, Accounting, and Auditing Clerks	1,480	15.55
Cooks, Fast Food	1,450	8.56
First-Line Supervisors of Food Preparation and Serving Workers	1,380	13.34
Hotel, Motel, and Resort Desk Clerks	1,280	9.87

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 Waccamaw area, 32 of the top 50 jobs in 2012 are considered low-skill jobs. Seventeen are middle skill, and one is a high-skill occupation.

Figure 5: Top Occupations By Skill Classification - Waccamaw 2012

Skillset: LOW
Amusement and Recreation Attendants
Bartenders
Cashiers
Combined Food Preparation and Serving Workers, Including Fast Food
Construction Laborers
Cooks, Fast Food
Cooks, Institution and Cafeteria
Cooks, Restaurant
Counter and Rental Clerks
Counter Attendants, Cafeteria, Food Concession, and Coffee Shop
Customer Service Representatives
Dining Room and Cafeteria Attendants and Bartender Helpers
Dishwashers
Driver/Sales Workers
Food Preparation Workers
Hosts and Hostesses, Restaurant, Lounge, and Coffee Shop
Hotel, Motel, and Resort Desk Clerks
Janitors and Cleaners, Except Maids and Housekeeping Cleaners
Laborers and Freight, Stock, and Material Movers, Hand
Landscaping and Groundskeeping Workers
Laundry and Dry-Cleaning 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
Stock Clerks and Order Fillers
Teacher Assistants
Tellers
Waiters and Waitresses
Skillset: MIDDLE
Bookkeeping, Accounting, and Auditing Clerks
Bus Drivers, School or Special Client
Carpenters
Firefighters
First-Line Supervisors of Food Preparation and Serving Workers
First-Line Supervisors of Office and Administrative Support Workers
First-Line Supervisors of Retail Sales Workers
General and Operations Managers
Heavy and Tractor-Trailer Truck Drivers
Licensed Practical and Licensed Vocational Nurses
Maintenance and Repair Workers, General
Nursing Assistants
Police and Sheriff's Patrol Officers
Real Estate Sales Agents
Registered Nurses
Sales Representatives, Wholesale and Manufacturing, Except Technical and Scientific Products
Team Assemblers
Skillset: HIGH
Accountants and Auditors

Source: BLS, SCDEW, Workforce Intelligence (WI)

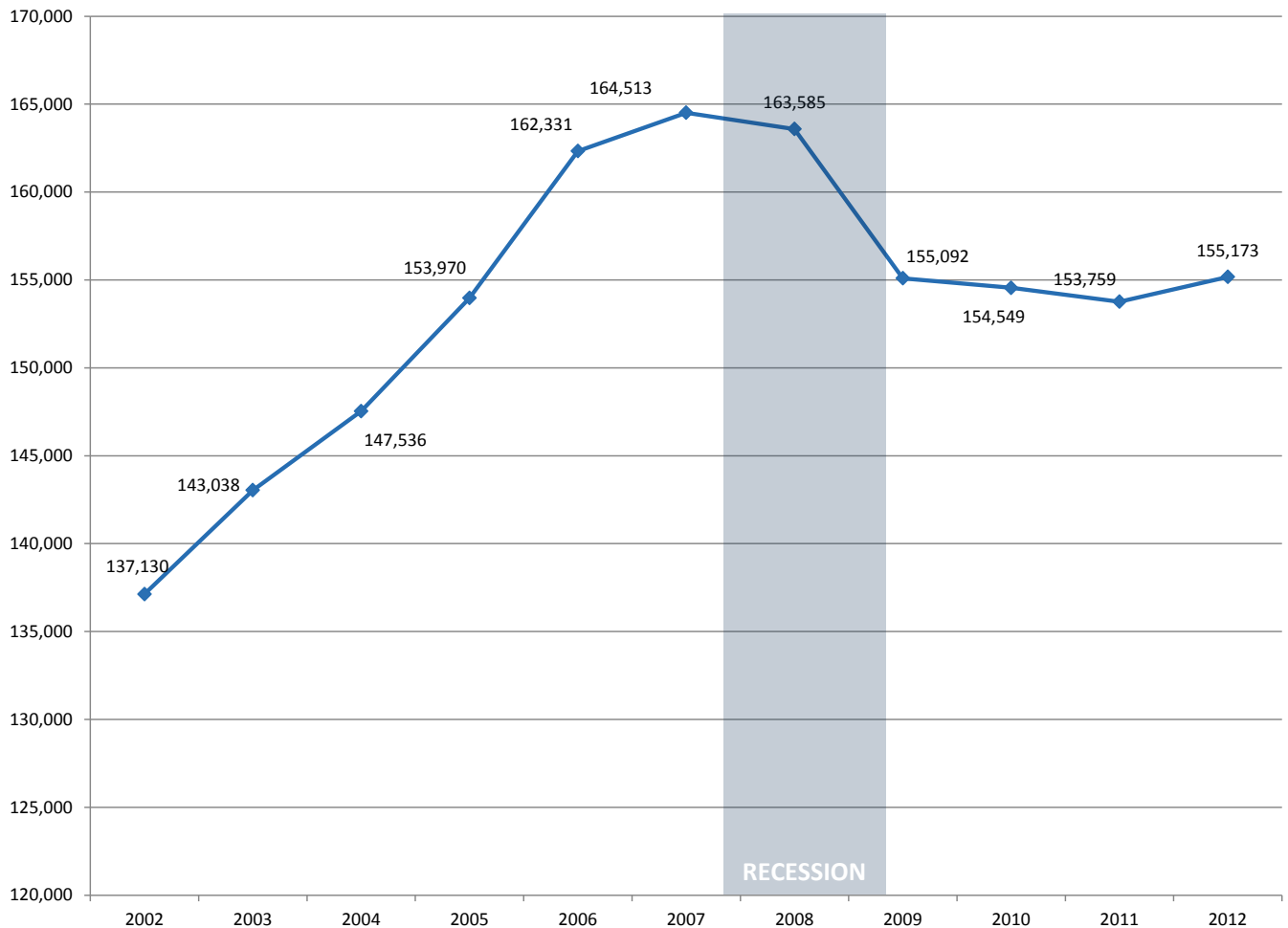
EMPLOYMENT AND UNEMPLOYMENT

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

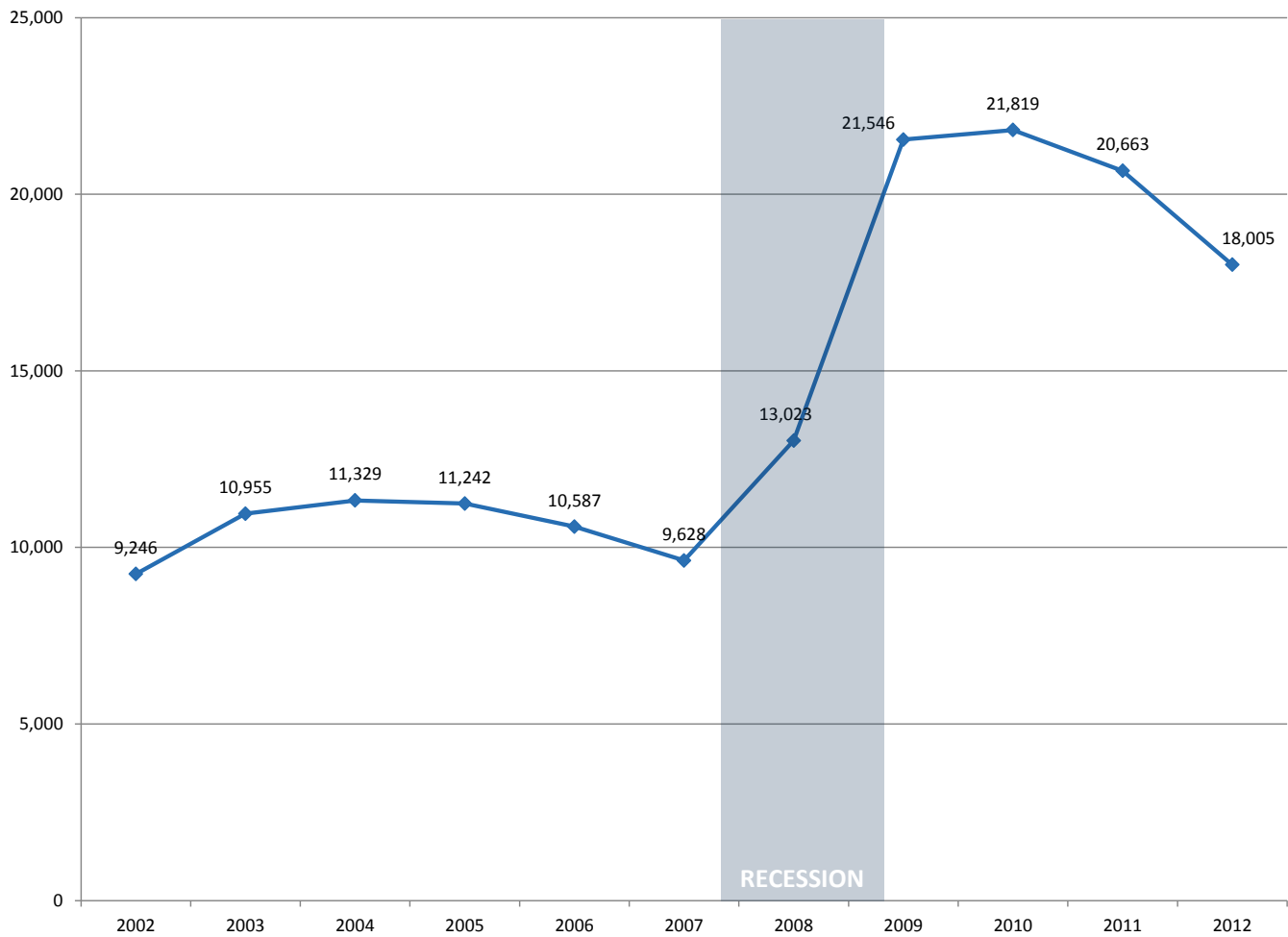
In Figure 6, the recession (officially from December 2007 through June 2009) had a great effect on the labor force. Employment dropped, and unemployment increased by 124 percent.

Figure 6: Employment - 2002-2012



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

Figure 7: Unemployment - 2002-2012

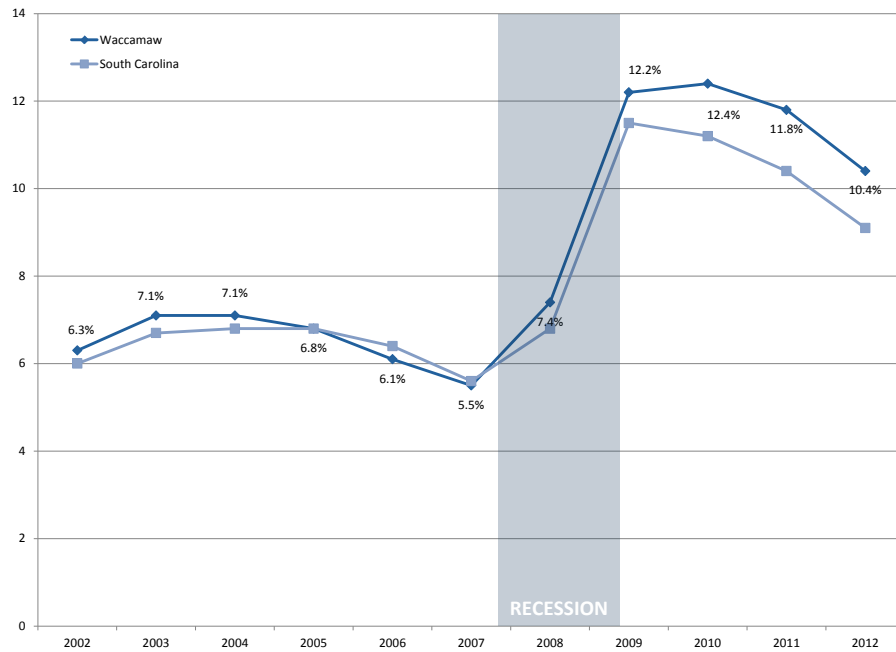


Source: BLS, SCDEW, LAUS

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 Waccamaw area and South Carolina. Waccamaw's rate has historically been about the same as the state's rate but exceeded it during and after the recession. During the recession, the Waccamaw rate more than doubled from 5.5 percent in 2007 to 12.2 percent in 2009.

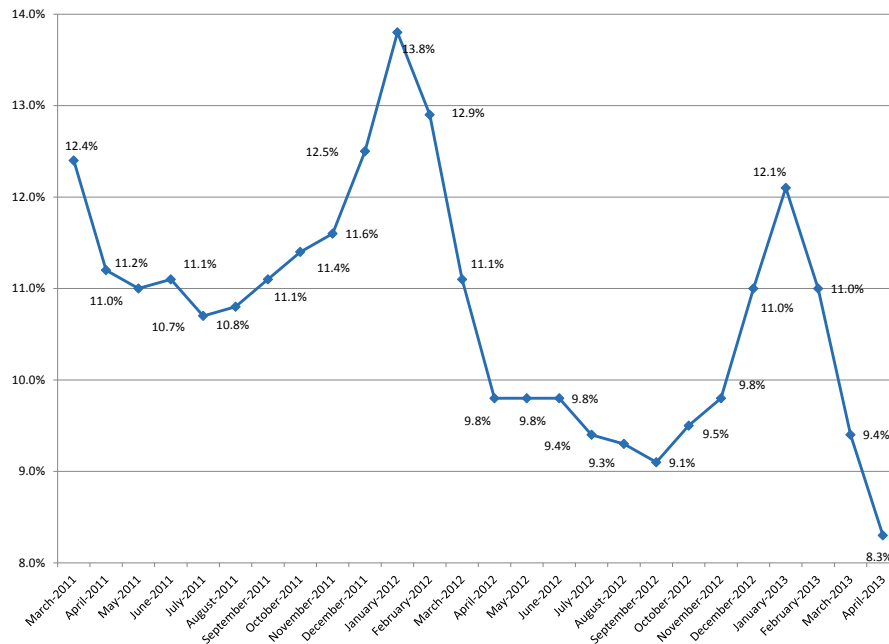
Figure 8: Annual Unemployment - 2002-2012



Source: BLS, SCDEW, LAUS

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

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



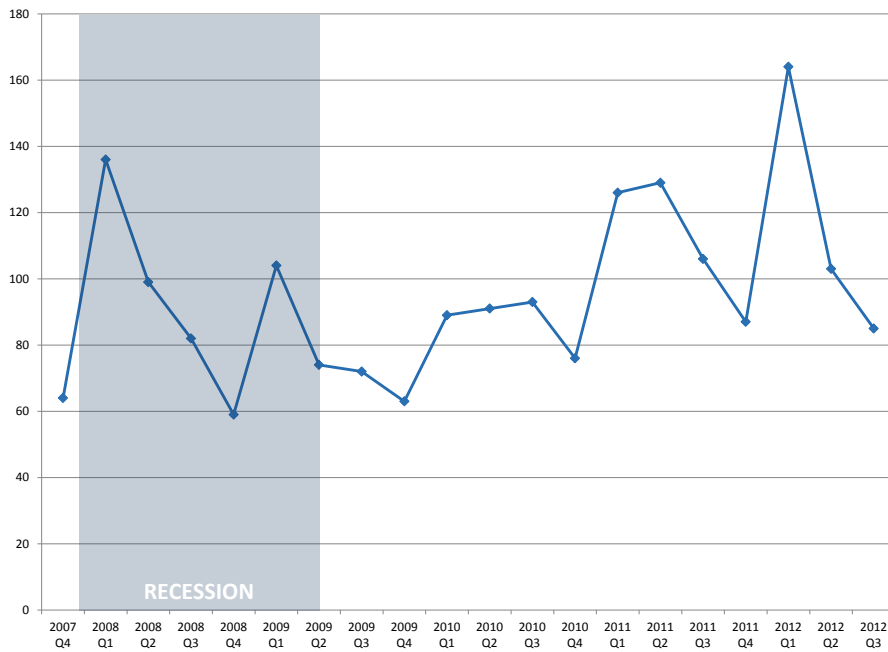
Source: BLS, SCDEW, LAUS

NEW STARTUP FIRMS

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

ter of the year.) Again, the recession had a major impact on normal business birth and death rates. Startups have been steadily increasing in the area after the recession 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. Waccamaw has 94 percent of establishments designated as small businesses, and the state as a whole has 93 percent.

Small businesses may need more support and assistance than larger companies because they may not have the resources to man a human resources department. They may rely on other options, 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	Waccamaw	South Carolina
0 to 4	5,363	63,766
5 to 9	1,910	19,667
10 to 19	1,272	13,316
20 to 49	938	9,881
50 to 99	326	3,907
100 to 249	188	2,433
250 to 499	31	757
500 to 999	9	328
1000 +	7	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 Waccamaw 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 a few segments of the population. However, in the under age 39 cohorts, Waccamaw has a notably lower proportion of population than the state as a whole does, and in the 55-84 age cohorts, the area has a higher proportion of population than the state.

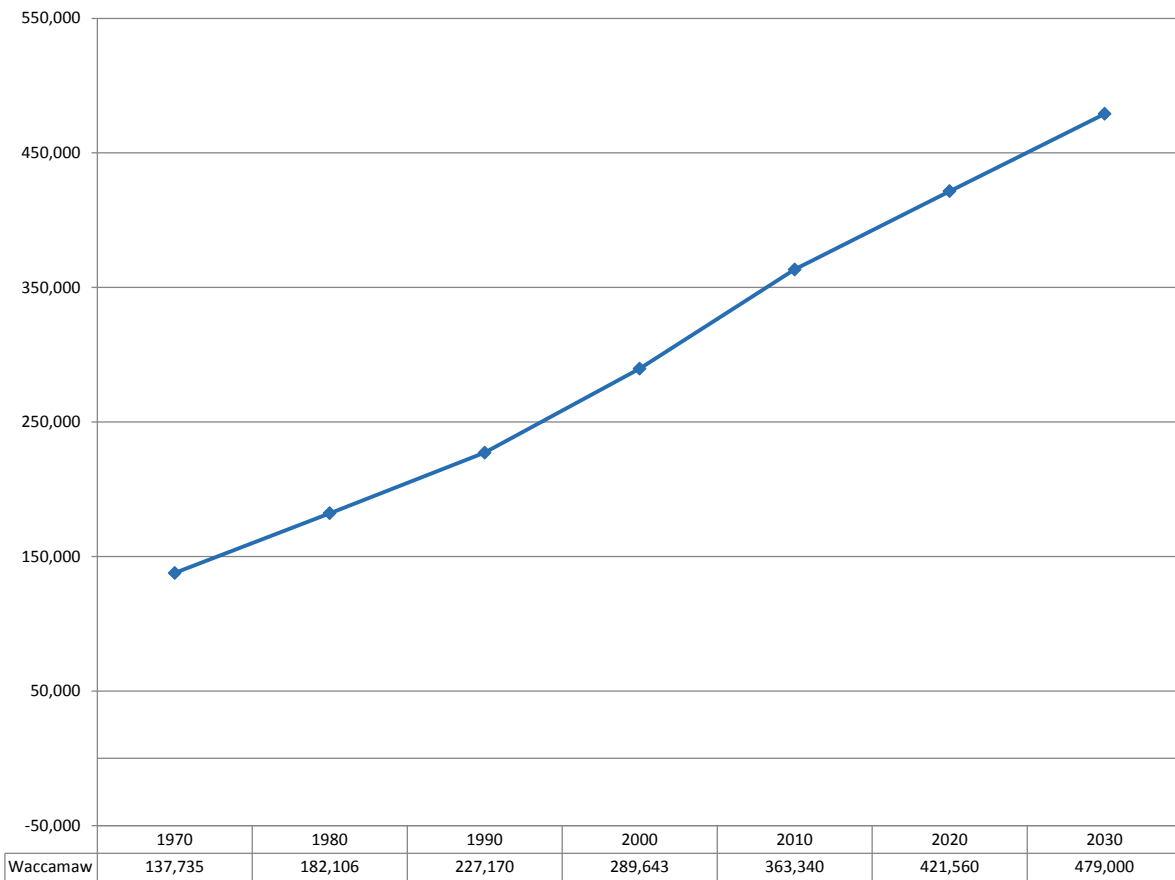
Figure 12: Population by Age

Age Range	Waccamaw	SC	US
0-4	5.7%	6.5%	6.6%
5-9	5.8%	6.4%	6.6%
10-14	5.7%	6.5%	6.7%
15-19	6.2%	7.2%	7.2%
20-24	6.5%	7.2%	7.0%
25-29	6.1%	6.6%	6.8%
30-34	5.9%	6.2%	6.4%
35-39	5.7%	6.5%	6.6%
40-44	6.8%	6.8%	7.0%
45-49	7.0%	7.2%	7.4%
50-54	6.9%	7.0%	7.2%
55-59	7.4%	6.5%	6.3%
60-64	7.3%	5.9%	5.3%
65-69	5.8%	4.5%	3.9%
70-74	4.5%	3.3%	3.0%
75-79	3.1%	2.5%	2.4%
80-84	2.0%	1.7%	1.9%
85 and older	1.5%	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 rapid increase in population from 1990 to 2000 (up 27.5 percent), the growth of the population of this area continued, growing by 25 percent over the next 10 years. Growth is projected to increase about 1.5 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	380,888	4.0%	0.4%	1.6%	7.3%
Hispanic or Latino origin (of any race)	18,960	7.1%	3.8%	2.8%	7.2%
White alone, not Hispanic or Latino	268,519	4.4%	0.3%	1.3%	6.8%
Population 25 Years and Over					
Less than high school graduate	37,528	3.5%	0.6%	1.7%	6.7%
High school graduate/GED	93,950	3.1%	0.2%	1.3%	6.0%
Some college or associate's degree	79,607	3.7%	0.2%	1.3%	6.0%
Bachelor's degree	35,298	4.4%	0.4%	1.1%	4.3%
Graduate or professional degree	19,633	3.3%	0.6%	1.3%	4.5%

Source: US Census Bureau, ACS, SCDEW

In-migration (people moving into Waccamaw) shows that just under 4 percent of residents with a graduate degree and nearly 5 percent of those with a bachelor’s degree came from out of state or out of the country. While a higher percent of Hispanics moved into Waccamaw from a different state than Whites, they moved into Waccamaw from abroad at more than 10 times the rate of Whites. Though over 13 percent of residents over the age of one moved, only 4.4 percent came from outside of South Carolina.

COMMUTING PATTERNS

The vast majority of the workers (86 percent) of Waccamaw lives and works in the area. The tables in Figure 15 show that 13,000 workers commute in from other areas to work in Waccamaw. Florence County draws a notable portion of residents out of the area to work. Nearly 2,700 more employees commute into the area than leave it to work.

Figure 15: Commuting Patterns - 2010

To Waccamaw WIA From	13,013	From Waccamaw WIA To	10,340
Florence County, SC	2,542	Florence County, SC	2,454
Columbus County, NC	2,315	Marion County, SC	974
Brunswick County, NC	2,285	Brunswick County, NC	874
Marion County, SC	1,886	Charleston County, SC	799
		Berkeley County, SC	510

Source: US Census Bureau, ACS

EDUCATIONAL ATTAINMENT

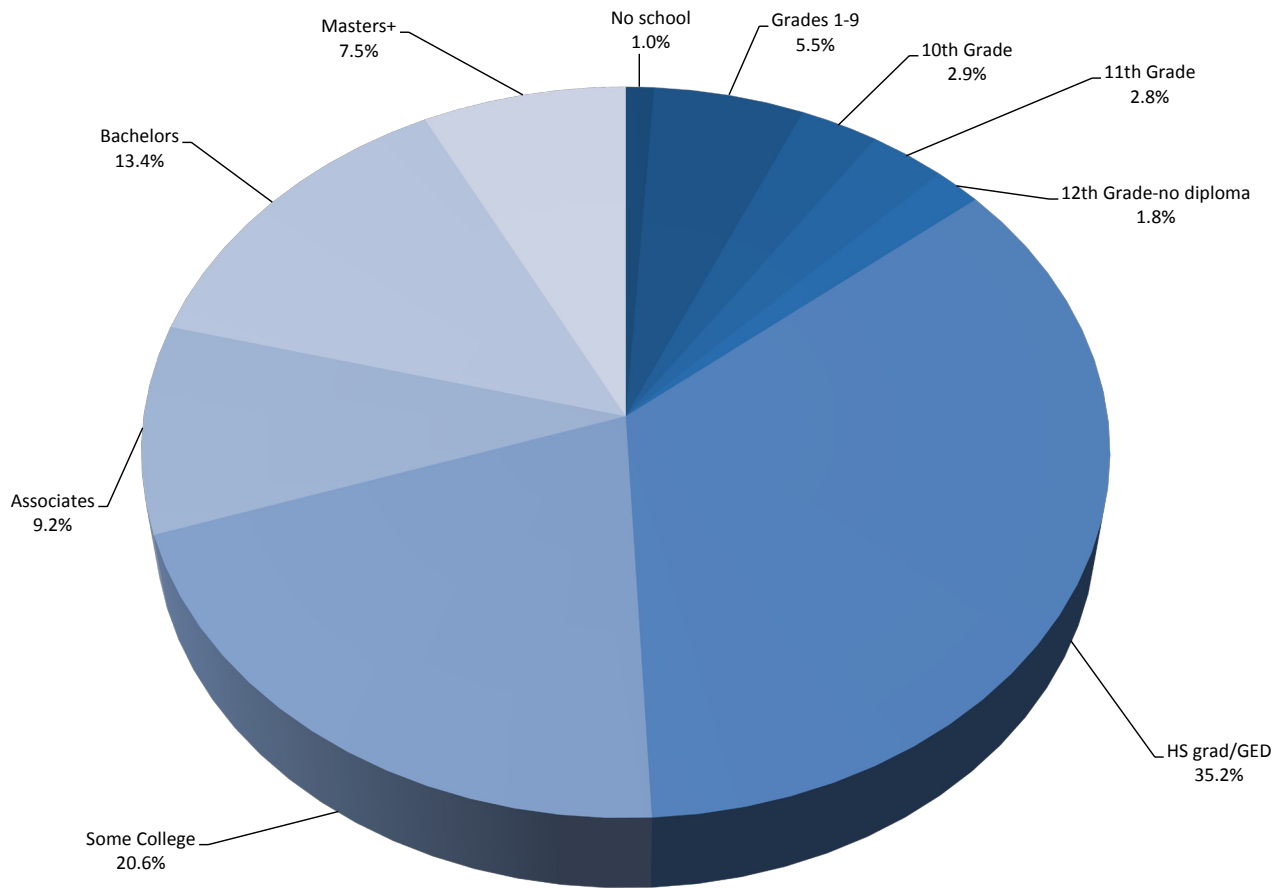
Waccamaw has a lower concentration of residents with less than an eleventh grade education than the state as a whole and a higher concentration with a high school diploma, with some college, or with an associate’s degree than the state as a whole. It also has a notably lower percent of residents with a bachelor’s degree or higher than the state does.

Figure 16: Educational Attainment - Waccamaw and South Carolina 2011

Education Level	Waccamaw	SC
No school	1.0	1.1
Grades 1-9	5.5	7.0
10th Grade	2.9	3.3
11th Grade	2.8	3.2
12th Grade-no diploma	1.8	1.8
HS grad/GED	35.2	30.9
Some College	20.6	20.1
Associates	9.2	8.4
Bachelors	13.4	15.6
Masters+	7.5	8.6

Source: US Census Bureau, ACS, SCDEW

Figure 17: Educational Attainment - Waccamaw 2011

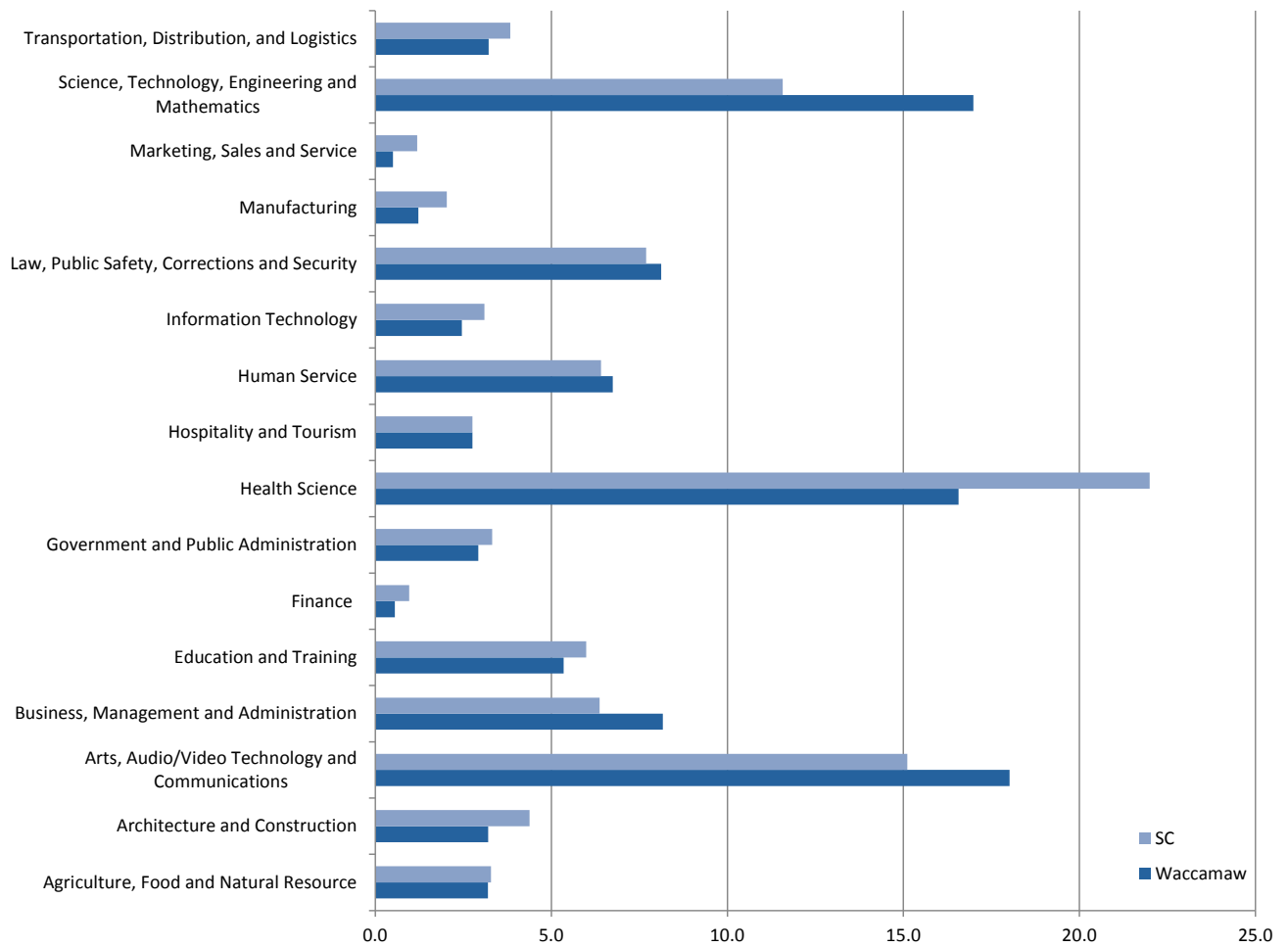


Source: US Census Bureau, ACS, SCDEW

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 Waccamaw 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 Arts, Audio/Video Technology and Communications career cluster is the top choice for students in the Waccamaw area. In keeping with the state trend, the area’s students also picked the Science, Technology, Engineering and Mathematics (STEM) cluster in notable numbers. The Health Science cluster is a choice for many students, likely in response to news of a shortage of healthcare workers in South Carolina.

Figure 19: Career Clusters - 2012

Cluster	Waccamaw	SC
Agriculture, Food and Natural Resource	3.2	3.3
Architecture and Construction	3.2	4.4
Arts, Audio/Video Technology and Communications	18.0	15.1
Business, Management and Administration	8.2	6.4
Education and Training	5.3	6.0
Finance	0.6	1.0
Government and Public Administration	2.9	3.3
Health Science	16.6	22.0
Hospitality and Tourism	2.8	2.8
Human Service	6.7	6.4
Information Technology	2.5	3.1
Law, Public Safety, Corrections and Security	8.1	7.7
Manufacturing	1.2	2.0
Marketing, Sales and Service	0.5	1.2
Science, Technology, Engineering and Mathematics	17.0	11.6
Transportation, Distribution, and Logistics	3.2	3.8

Source: SC Department of Education

DEGREES AWARDED

In higher education, Waccamaw area colleges and universities have conferred a wide variety of awards. Of the top 20, Registered Nursing and Liberal Arts and Sciences are the most popular followed by Management. The institutions included in this data are Coastal Carolina University, Horry-Georgetown Technical College, and Williamsburg Technical College.

Figure 20: Top 20 Majors in Waccamaw - 2011

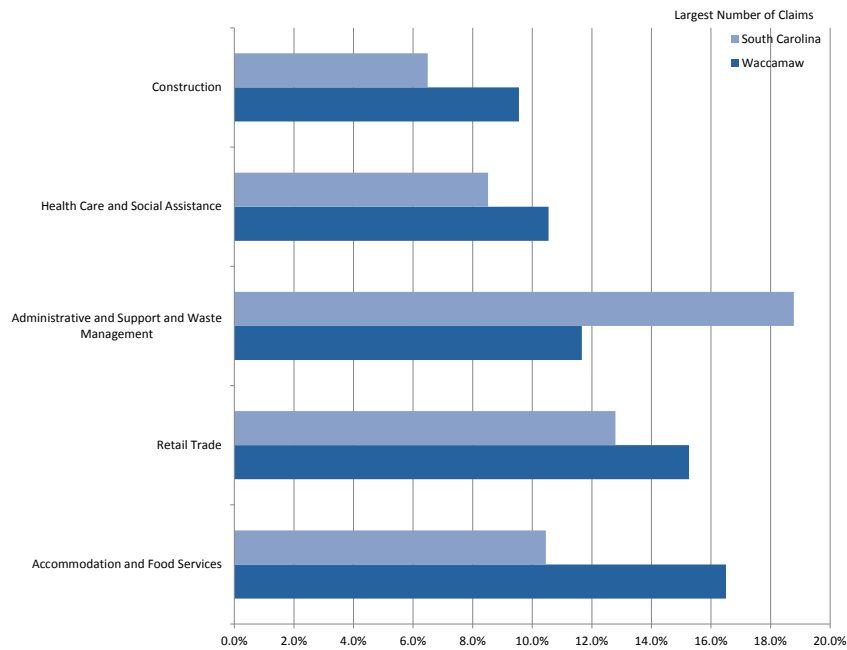
Majors	
Registered Nursing/Registered Nurse	355
Liberal Arts and Sciences/Liberal Studies	271
Management	151
Licensed Practical/Vocational Nurse Training	128
Marketing/Marketing Management, General	103
Speech Communication and Rhetoric	102
Marine Biology and Biological Oceanography	95
Psychology, General	85
Accounting	78
Business/Commerce, General	77
Biology/Biological Sciences, General	70
Child Care Provider/Assistant	70
Child Care and Support Services Management	68
Public Health Education and Promotion	64
Early Childhood Education and Teaching	63
History, General	59
Sport and Fitness Administration/Management	58
Cosmetology/Cosmetologist, General	56
Political Science and Government, General	56
Elementary Education and Teaching	54

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 Waccamaw area, the highest number of claims is filed in the Accommodation and Food Services industry followed by the Retail Trade group. These two sectors include hotels, motels, recreational vehicle parks, restaurants, drinking places as well as motor vehicle and parts dealers, furniture and appliance stores, and building materials and garden supply dealers. These industries highlight the tourist and recreational base of the economy of Waccamaw and its support.

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



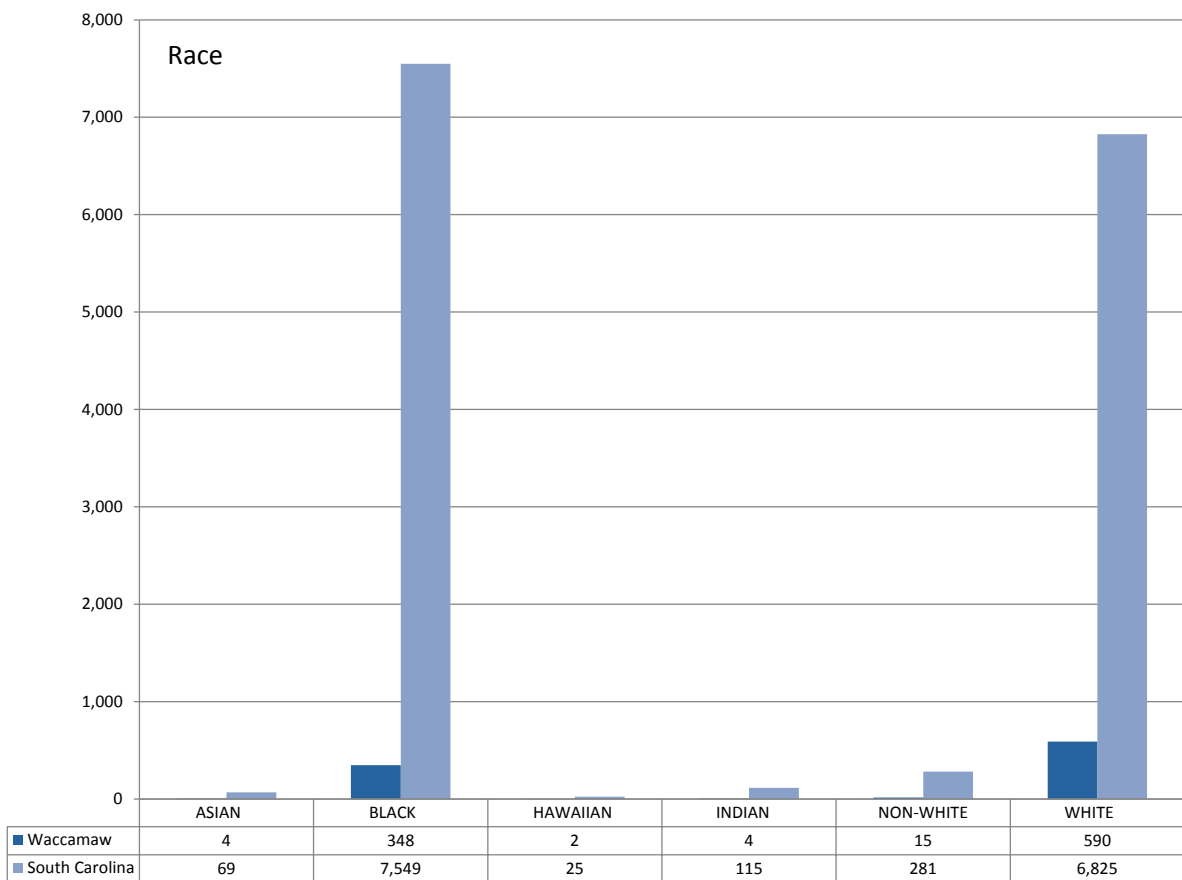
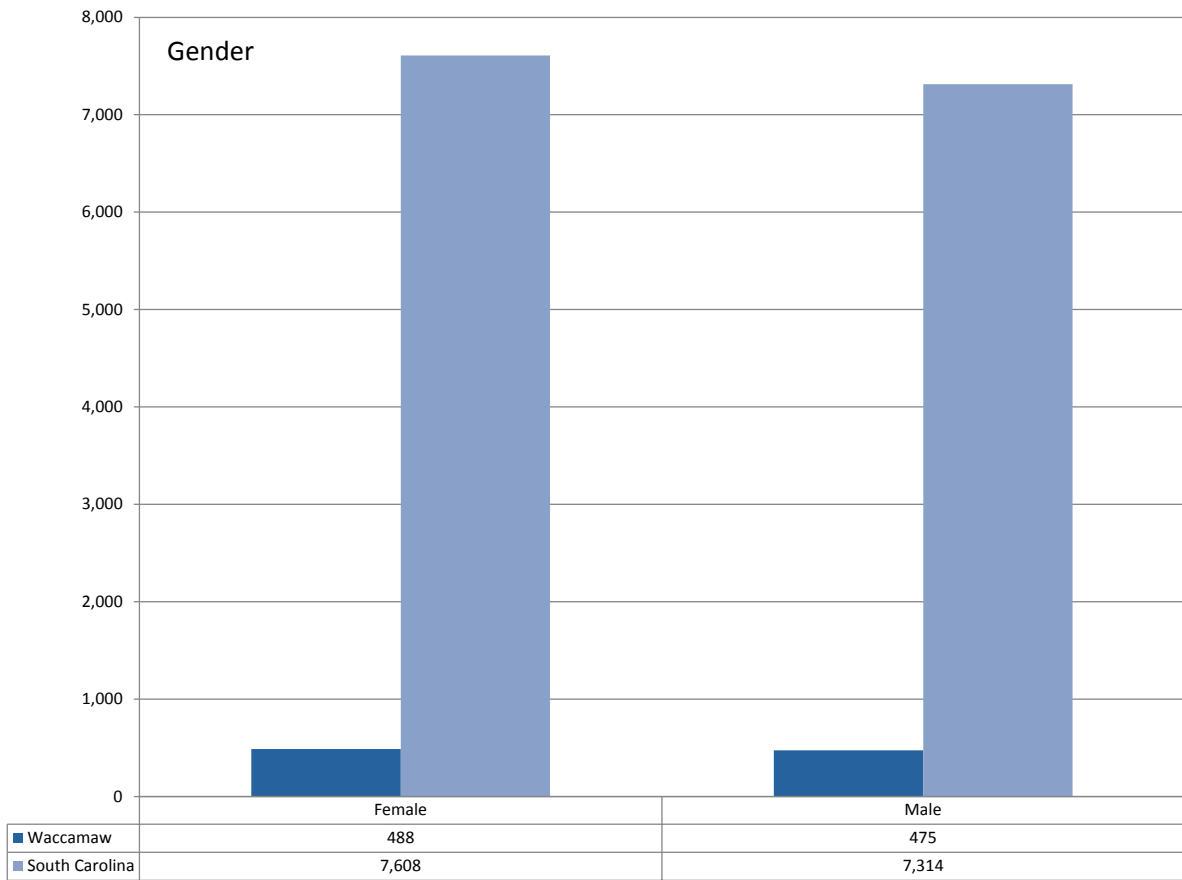
Occupation	Waccamaw	South Carolina
Accommodation and Food Services	133	1,321
Retail Trade	123	1,616
Administrative and Support and Waste Management	94	2,373
Health Care and Social Assistance	85	1,076
Construction	77	820
Manufacturing	55	2,267
Professional, Scientific, and Technical Services	38	698
Wholesale Trade	33	445
Real Estate and Rental and Leasing	32	213
Finance and Insurance	27	300
Arts, Entertainment, and Recreation	27	94
Other Services (except Public Administration)	18	292
Information	14	122
Transportation and Warehousing	12	414
Educational Services	12	222
Public Administration	11	206
Agriculture, Forestry, Fishing and Hunting	10	98
Utilities	3	22
Management of Companies and Enterprises	2	35

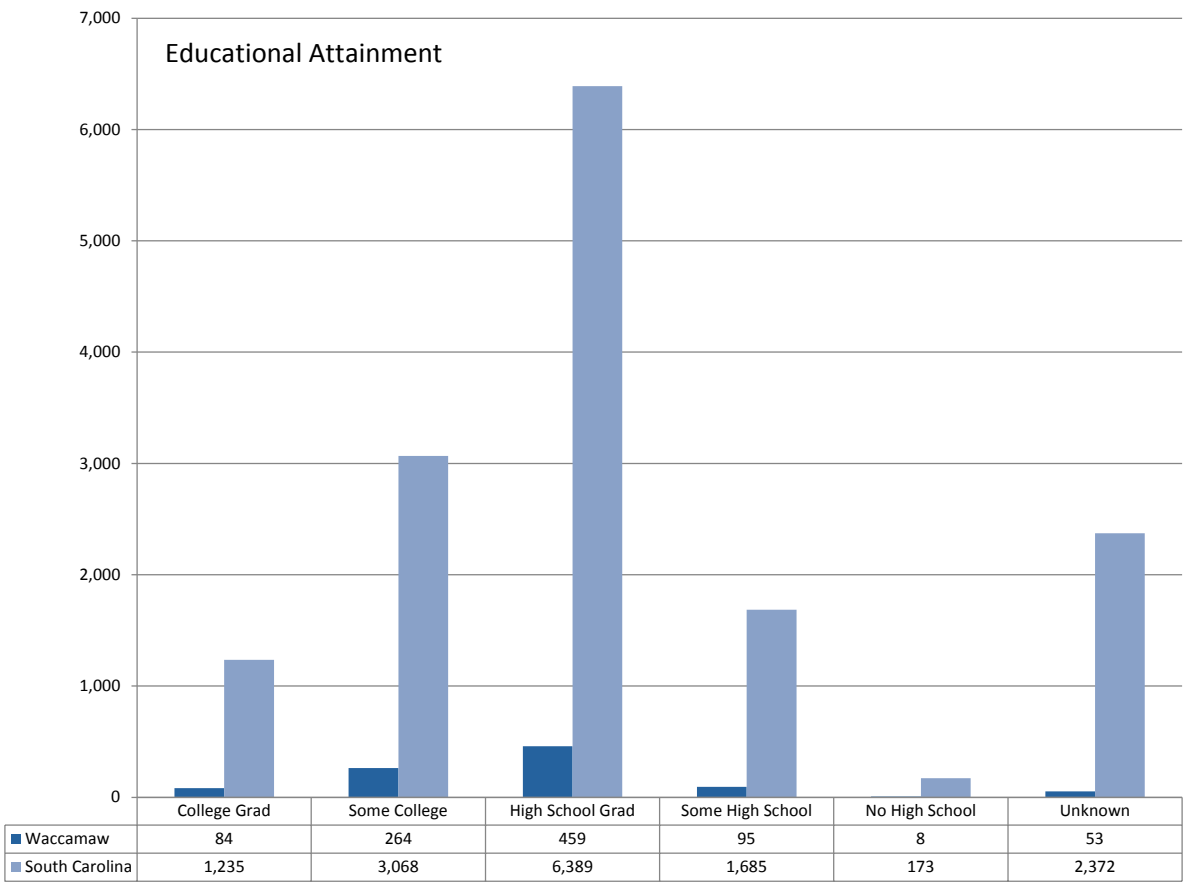
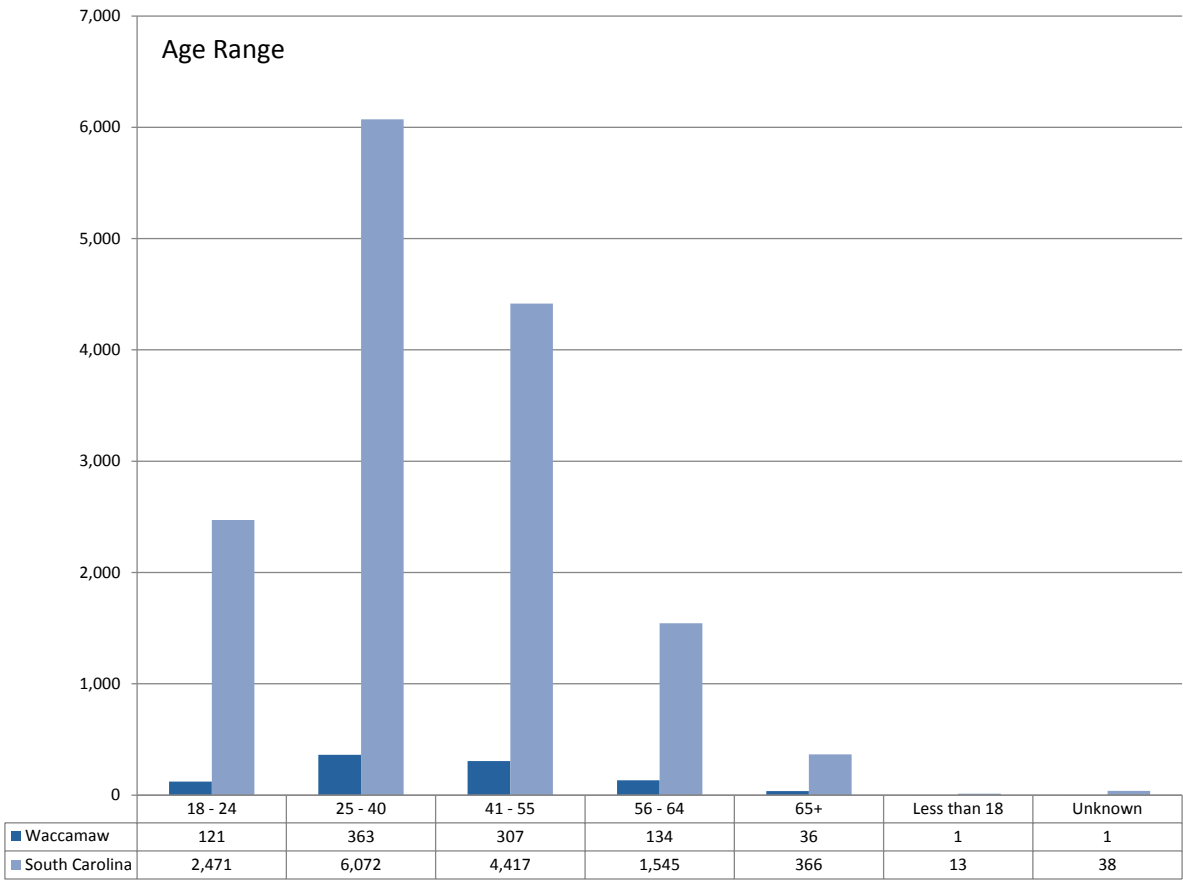
Source: SCDEW

UNEMPLOYMENT INSURANCE CLAIMANT CHARACTERISTICS

The people in this area who were receiving unemployment insurance benefits in April 2013 were typically female, white, 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 Waccamaw was Sales and Related Occupations followed by Healthcare Practitioners and Technical Occupations.

ONLINE JOB ADVERTISEMENTS

Figure 23: Waccamaw HWOL - April 2013 by Major Group

Occupation	# of Job Ads
Sales and Related Occupations	1028
Healthcare Practitioners and Technical Occupations	791
Food Preparation and Serving Related Occupations	766
Miscellaneous	642
Office and Administrative Support Occupations	621
Building and Grounds Cleaning and Maintenance Occupations	376
Transportation and Material Moving Occupations	368
Installation, Maintenance, and Repair Occupations	316
Management Occupations	257
Construction and Extraction Occupations	247
Personal Care and Service Occupations	239
Healthcare Support Occupations	173
Business and Financial Operations Occupations	104
Education, Training, and Library Occupations	100
Arts, Design, Entertainment, Sports, and Media Occupations	98
Protective Service Occupations	77
Production Occupations	72
Computer and Mathematical Occupations	63
Community and Social Services Occupations	46
Architecture and Engineering Occupations	24
Legal Occupations	22
Life, Physical, and Social Science Occupations	8
Farming, Fishing, and Forestry Occupations	7
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 Accommodation and Food Services industry is projected to have the largest increase in employment from 2008 to 2018, growing by 4,388 jobs or 439 jobs/year. The Retail Trade category reports the next largest growth with a projected 409 openings/year followed by the Health Care and Social Assistance sector.

Figure 24: Industry Projections - 2008-2018

Industry	Estimate Employment (2008)	Projected Employment (2018)	Change	Percent Change	Annual Percent Change
Total Employment, All Jobs	167,109	189,599	22,490	13.46	1.27
Accommodation and Food Services	31,772	36,160	4,388	13.81	1.30
Retail Trade	24,989	29,082	4,093	16.38	1.53
Health Care and Social Assistance	13,052	15,890	2,838	21.74	1.99
Construction	11,045	12,834	1,789	16.20	1.51
Educational Services	10,145	11,847	1,702	16.78	1.56
Administrative and Support and Waste Management and Remediat	7,619	8,984	1,365	17.92	1.66
Government	8,839	10,050	1,211	13.70	1.29
Professional, Scientific, and Technical Services	4,138	5,173	1,035	25.01	2.26
Arts, Entertainment, and Recreation	6,731	7,684	953	14.16	1.33
Other Services (Except Government)	5,755	6,494	739	12.84	1.22
Real Estate and Rental and Leasing	5,669	6,372	703	12.40	1.18
Wholesale Trade	3,183	3,564	381	11.97	1.14
Finance and Insurance	3,874	4,113	239	6.17	0.60
Management of Companies and Enterprises	756	919	163	21.56	1.97
Information	1,973	2,082	109	5.52	0.54
Transportation and Warehousing	1,789	1,887	98	5.48	0.53
Utilities	501	512	11	2.20	0.22
Mining	112	102	-10	-8.93	-0.93
Manufacturing	8,761	8,601	-160	-1.83	-0.18
Agriculture, Forestry, Fishing and Hunting	2,601	2,157	-444	-17.07	-1.85

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. The Hotel, Motel, and Resort Desk Clerks position is the leading projected growing occupation followed by Personal and Home Care Aides and Heating, Air Conditioning, and Refrigeration Mechanics.

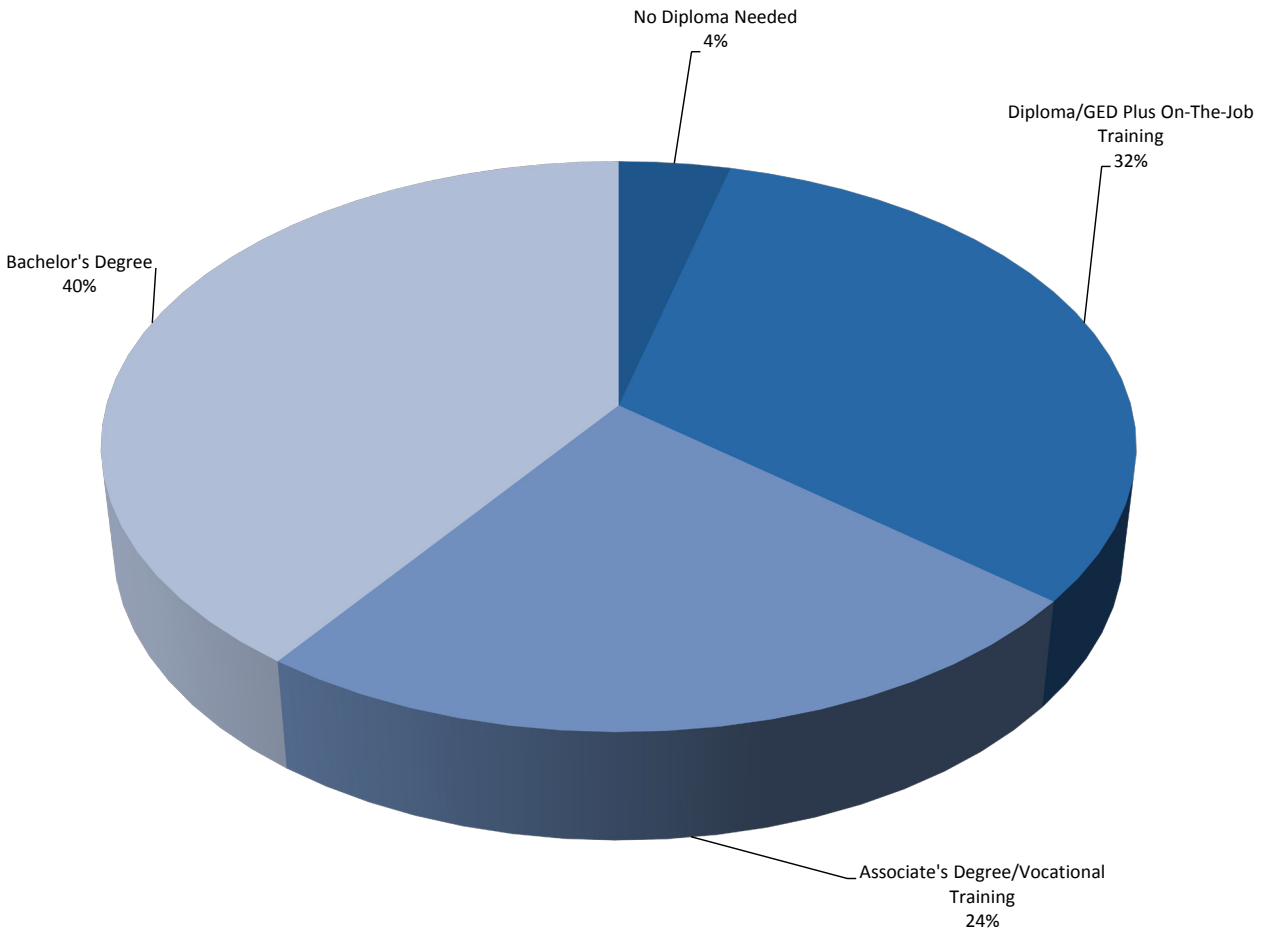
Figure 25: Growing Occupations - 2008-2018

Occupation	Estimated Employment (2008)	Projected Employment (2018)
Hotel, Motel, and Resort Desk Clerks	1,375	1,745
Accountants and Auditors	1,233	1,552
Personal and Home Care Aides	709	1,019
Heating, Air Conditioning, and Refrigeration Mecha	618	836
Pharmacy Technicians	408	586
Helpers--Electricians	406	516
Coaches and Scouts	267	346
Public Relations Specialists	256	325
Management Analysts	187	250
Compliance Officers, Except Agriculture, Construct	172	229
Self-Enrichment Education Teachers	155	216
Surgical Technologists	160	210
Social and Human Service Assistants	161	207
Instructional Coordinators	147	193
Fitness Trainers and Aerobics Instructors	149	191
Police, Fire, and Ambulance Dispatchers	150	190
Environmental Engineers	51	70
Captains, Mates, and Pilots of Water Vessels	47	61
Cardiovascular Technologists and Technicians	44	56
Veterinary Technologists and Technicians	42	55

Source: BLS, SCDEW, OES, WI

Of the top 50 projected growing occupations by percent change, 16 require a high school diploma or GED, two require less than a high school diploma or GED, 20 require a bachelor's degree or higher, and 12 need an associate's degree or require some kind of postsecondary vocational certification. Both of the two 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 Waccamaw - 2008-2018

Occupation
Aircraft Mechanics and Service Technicians
Computer Operators
Cutting, Punching, and Press Machine Setters
Farmworkers & Laborers, Crop, Nursery & Greenhouse
File Clerks
Helpers--Production Workers
Human Resources Assistants, Except Payroll
Machine Feeders and Offbearers
Mail Clerks and Mail Machine Operators
Meter Readers, Utilities
Order Clerks
Packers and Packagers, Hand
Postal Service Clerks
Postmasters and Mail Superintendents
Pressers, Textile, Garment, and Related Materials
Reporters and Correspondents
Sewing Machine Operators
Telemarketers
Textile Cutting Machine Setters, Operators, Tender
Weighers, Measurers, Checkers, and Samplers

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	7
Middle	23
High	20

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 Waccamaw, the supply of workers, and the characteristics of workers who will be in demand has been reviewed. What can be gleaned from these findings? Are there gaps between supply and demand?

Supply Findings

Although the population should grow to 2030, a smaller-than-the-state share of 20-39 year olds in their prime working age, Waccamaw looks to have a challenge in having a proper age mix of workers given the tourist economy. In-migration from other states/countries adds a few residents at the top end of the educational spectrum. The area has a lower percent of residents aged 25 and older with at least a bachelor's degree than the state does as a whole, but has an above average percent of people with a high school diploma, some college, or an associate's degree.

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

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; Hospitality and Tourism; and Business, Management, and Administration. Health Science was a short-term need. Almost all 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	2.3	3.6	1.0	3.2
Architecture and Construction	6.6	7.1	1.8	3.2
Arts, Audio/Video Technology and Communications	2.3	0.8	2.5	18.0
Business, Management and Administration	10.8	12.3	12.6	8.2
Education and Training	2.0	4.4	22.4	5.3
Finance	4.9	1.7	1.2	0.6
Government and Public Administration	0.1	0.3	1.8	2.9
Health Science	16.6	6.0	28.2	16.6
Hospitality and Tourism	11.0	19.7	1.3	2.8
Human Service	8.5	8.8	8.6	6.7
Information Technology	1.8	0.6	2.6	2.5
Law, Public Safety, Corrections and Security	1.8	3.8	2.3	8.1
Manufacturing	1.9	2.9	1.0	1.2
Marketing, Sales and Service	20.3	23.5	3.3	0.5
Science, Technology, Engineering and Mathematics	0.9	0.6	9.2	17.0
Transportation, Distribution, and Logistics	8.4	3.9	0.3	3.2

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

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

- There are many post-secondary degrees being earned by area graduates in Health Science; Education and Training; and Science, Technology, Engineering and Mathematics that exceed short-term demand in the area.
- There is an overabundance of Arts, Audio/Video Technology and Communication; Health Science; Science, Technology, Engineering, and Math; and Law, Public Safety, Corrections and Security clusters selected by students that will far outpace the area's long-term demand.
- The short- and long-term demand for workers in Marketing, Sales and Service and Hospitality and Tourism is not projected to be met by today's area graduates or students.
- There is a short-term shortage of graduates in Architecture and Construction and Transportation, Distribution, and Logistics to meet demand.

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 Waccamaw area overall encompasses an economy dependent on tourism and retail trade. The population continues to increase, and the education level for the population is higher than the state as a whole at the midrange with higher percentages of residents with high school diplomas to associate's degrees. 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; hospitality and tourism; business management and administration; and marketing and sales. However, some supply flows could be fine-tuned to be more in line with demand.

The data shows that in the area:

- 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 Waccamaw's future demand.
- There is an oversupply of today's students choosing the areas of Arts, Audio/Video Technology and Communication; 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 Waccamaw meet the challenges it faces.