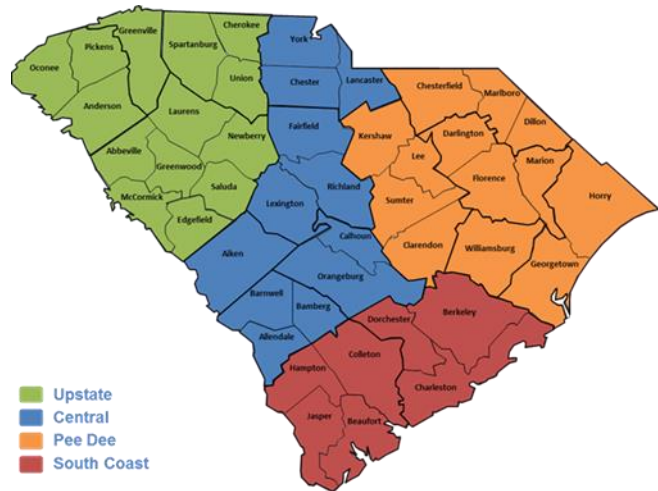


# South Carolina WIOA Regional Data Analysis



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*South Carolina WIOA Regional Data Analysis* is published by the Business Intelligence Department (BID) of the South Carolina Department of Employment and Workforce (SCDEW). The information and analyses provided in this publication are based on data collected from sources throughout South Carolina and the United States.

About SCDEW and BID:

The Business Intelligence 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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## *South Carolina WIOA Regional Data Analysis*

One of the key tenets of the federal workforce legislation *Workforce Innovation and Opportunity Act of 2014 (WIOA)* is the concept of regional planning. In seeking to support local and regional employers, WIOA seeks to align workforce resources and economic development strategies.

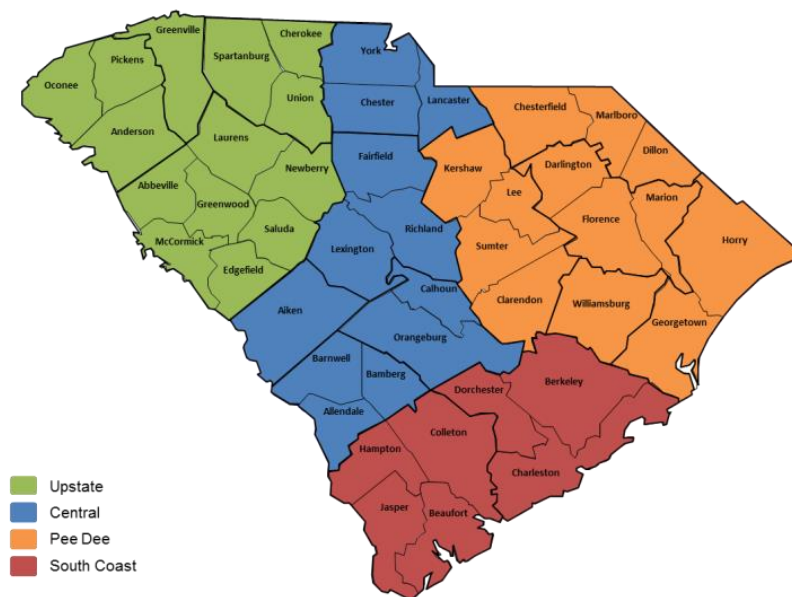
As a part of implementing WIOA, South Carolina initiated a process to determine regional planning areas. The purpose of this activity was to:

- Align workforce and economic development activities and resources,
- Align training and education with economic growth, employment opportunities, and regional skills competency requirements,
- Provide coordinated and efficient services to jobseekers and employers at the regional level, and
- Support implementation of sector strategies and career pathways.

Three state agencies that include the Department of Employment and Workforce, the Department of Education, the Department of Commerce, and the technical college system collaborated to develop a four-region system for the state as shown in **Figure 1**.

**Figure 1**

**South Carolina WIOA Planning Regions**



WIOA regulations provided criteria that may be considered when identifying regions:

- Population centers
- Labor force conditions
- Commuting patterns
- Industrial composition
- Location quotients
- Geographic boundaries

Additional factors that were also examined included:

- Income
- Poverty
- Educational attainment
- In-demand occupation groups

This report presents these data elements for each region and puts the information in context with the state overall. The regional development process that was followed included meetings with local area administrators, state agency collaborations, and a statewide webinar where this information was shared prior to the State Workforce Development Board voting its approval.

*Population Centers*

Population information that was considered included the most recent two national censuses as well as population projections from 2015 in five-year increments to the year 2030, highlighted in **Figure 2**. County data was aggregated to the regional level.

**Figure 2**

**Population Centers**

Measure	Values				
	Central	Pee Dee	South Coast	Upstate	Grand Total
April 1, 2000 Census	1,120,844	830,486	750,298	1,310,384	4,012,012
April 1, 2010 Census	1,323,518	933,573	911,599	1,456,674	4,625,364
July 1, 2015 Projection	1,391,100	967,600	962,300	1,502,200	4,823,200
July 1, 2020 Projection	1,458,600	1,001,800	1,012,900	1,547,500	5,020,800
July 1, 2025 Projection	1,529,400	1,038,500	1,061,500	1,606,100	5,235,500
July 1, 2030 Projection	1,600,900	1,075,300	1,110,300	1,665,200	5,451,700
Percent Population Growth 2010-2030	21.0%	15.2%	21.8%	14.3%	17.9%

Measure	Percent of Total or Above/Below the Average				
	Central	Pee Dee	South Coast	Upstate	Grand Total
April 1, 2000 Census	28%	21%	19%	33%	100%
April 1, 2010 Census	29%	20%	20%	31%	100%
July 1, 2015 Projection	29%	20%	20%	31%	100%
July 1, 2020 Projection	29%	20%	20%	31%	100%
July 1, 2025 Projection	29%	20%	20%	31%	100%
July 1, 2030 Projection	29%	20%	20%	31%	100%
Percent Population Growth 2010-2030	3.1%	-2.7%	3.9%	-3.6%	0.0%

Source: U.S. Census Bureau, S.C. Department of Health and Environmental Control, and S.C. Budget and Control Board - Office of Research & Statistics.

The state’s population grew from 4.012 million in 2000 to 4.625 million in 2010, a 15.3 percent increase. Thereafter, the state is projected to grow by 4 percent for each five-year period. The Upstate is the largest region with 1.310 million people in 2000 or 33 percent of the state total. The South Coast is the smallest region with 0.750 million people in 2000 but is projected to grow the fastest with a gain of 21.8 percent from 2010 to 2030, ending at 1.110 million people. Central and South Coast are projected to grow over 3 percent faster than the state average growth of 17.9 percent in the 2010-2030 period, while Pee Dee and Upstate fall below the statewide average growth by 2.7 percent and 3.6 percent, respectively.

While much of the nation is declining in population, South Carolina is growing. This should give the regions and their economies sufficient labor forces to continue to expand moving into the future.

*Labor Force Conditions*

Labor force statistics are a measure of the health of the economy in an area. In 2014, South Carolina had an unemployment rate of 6.4 percent and had 2.056 million people working as shown in **Figure 3**. The Central and Upstate regions had labor forces of over 600,000 people or roughly 30 percent of the state total each, while Pee Dee and South Coast had labor forces over 400,000 or about 20 percent each.

**Figure 3**

**Labor Force Conditions**

Measure	Values				
	Central	Pee Dee	South Coast	Upstate	Grand Total
2014 Labor Force	643,644	411,470	453,523	688,952	2,197,589
2014 Employment	601,329	379,792	427,984	647,031	2,056,136
2014 Unemployment	42,315	31,678	25,539	41,921	141,453
Unemployment Rate	6.6%	7.7%	5.6%	6.1%	6.4%

Measure	Percent of Total or Above/Below the Average				
	Central	Pee Dee	South Coast	Upstate	Grand Total
2014 Labor Force	29%	19%	21%	31%	100%
2014 Employment	29%	18%	21%	31%	100%
2014 Unemployment	30%	22%	18%	30%	100%
Unemployment Rate	0.1%	1.3%	-0.8%	-0.4%	0.0%

Source: U.S. Bureau of Labor Statistics, Local Area Unemployment Statistics (LAUS) Program

Upstate and South Coast had unemployment rates below the state average, while Central and Pee Dee had rates above that of the state. The Upstate had the highest level of employment at 647,000, and Pee Dee had the lowest with 340,000 workers. In terms of unemployment, Central had the highest level at 42,300, and South Coast had the lowest at 25,500.

*Commuting Patterns*

Commuting patterns highlight an important relationship between employers and their workers. They show the travel characteristics that employees have in getting to their workplace. Viewed in a broader perspective, the more a region can draw its workers from within its boundaries, the more self-sufficient it is in terms of workforce. A significant measure is the amount of inbound or outbound commuting an area has. **Figure 4** displays these measurements for South Carolina’s four WIOA regions.

**Figure 4**

**Commuting Patterns**

Measure	Values				
	Central	Pee Dee	South Coast	Upstate	Grand Total
One-Way Outbound From SC	134,588	89,588	56,571	93,655	374,402
One-Way Inbound to SC	145,399	53,982	54,358	80,140	333,879
Inbound-Outbound	10,811	-35,606	-2,213	-13,515	-40,523
IntraRegion	360,726	245,089	277,806	468,236	1,351,857

Measure	Percent of Total or Above/Below the Average				
	Central	Pee Dee	South Coast	Upstate	Grand Total
One-Way Outbound From SC	36%	24%	15%	25%	100%
One-Way Inbound to SC	44%	16%	16%	24%	100%
Inbound-Outbound	More Inbound	More Outbound	More Outbound	More Outbound	More Outbound
IntraRegion	27%	18%	21%	35%	100%

Source: U. S. Census Bureau, Longitudinal Employer-Household Dynamics (LEHD) Program, 2011 Primary Jobs

In 2011, Central had more inbound and outbound commuting than any other region by a wide margin with over 130,000 workers traveling to and from the region for work. In fact, 44 percent of the workers from North Carolina, Georgia, or South Carolina with a destination to one to the four regions came to the Central Region. Central was the only region having more inbound workers than outbound, highlighting the region’s role as a statewide employment center. The other three regions had more outbound commuters than inbound, illustrating that the regions’ number of jobs are not keeping up with the number of resident workers.

Upstate had the largest number of workers coming from within its boundaries with 468,000 daily commuters, and Pee Dee had the smallest number at 245,000 commuters. The Upstate region had the second highest totals of cross-area commuting with over 80,000 workers traveling both inbound and outbound. Pee Dee had the highest differential of cross-area commuting with more than 35,000 more outbound workers than inbound.

Industry Composition and Location Quotients

Industry makeup, in terms of level of employment, gives important information about the private sector economy for each region, illustrated in **Figure 5**.

**Figure 5**

**Industry Employment Composition & Location Quotients**

Measure	Values				
	Central	Pee Dee	South Coast	Upstate	Grand Total
Total, All Private Industries	474,435	284,667	333,403	542,419	1,634,924
Agriculture, Forestry, Fishing and Hunting	3,848	3,035	1,735	2,186	10,804
Mining, Quarrying, and Oil and Gas Extraction	329	304	114	202	949
Utilities	4,166	1,271	1,858	3,055	10,350
Construction	20,037	12,279	17,562	21,507	71,385
Manufacturing	54,602	36,751	26,148	103,266	220,767
Wholesale Trade	18,158	7,625	7,837	23,702	57,322
Retail Trade	63,426	48,033	49,999	67,899	229,357
Transportation and Warehousing	13,906	7,520	14,451	18,724	54,601
Information	8,439	3,443	5,758	9,150	26,790
Finance and Insurance	29,930	8,960	8,967	16,001	63,858
Real Estate and Rental and Leasing	6,734	5,919	7,353	5,558	25,564
Professional, Scientific, and Technical Services	21,616	8,263	20,808	21,490	72,177
Management of Companies and Enterprises	4,793	1,928	2,717	6,800	16,238
Administrative and Support and Waste Management	39,811	12,885	25,979	50,288	128,963
Educational Services	48,198	17,877	23,856	45,267	135,198
Health Care and Social Assistance	68,035	44,704	50,324	74,817	237,880
Arts, Entertainment, and Recreation	7,248	7,365	7,148	7,315	29,076
Accommodation and Food Services	47,536	47,969	48,484	51,761	195,750
Other Services	13,623	8,536	12,305	13,431	47,895

Measure	Percent of Total or Above/Below the Average				
	Central	Pee Dee	South Coast	Upstate	Grand Total
Total, All Private Industries	29%	17%	20%	33%	100%
Agriculture, Forestry, Fishing and Hunting	0.8%	1.1%	0.5%	0.4%	0.7%
Mining, Quarrying, and Oil and Gas Extraction	0.1%	0.1%	0.0%	0.0%	0.1%
Utilities	0.9%	0.4%	0.6%	0.6%	0.6%
Construction	4.2%	4.3%	5.3%	4.0%	4.4%
Manufacturing	11.5%	12.9%	7.8%	19.0%	13.5%
Wholesale Trade	3.8%	2.7%	2.4%	4.4%	3.5%
Retail Trade	13.4%	16.9%	15.0%	12.5%	14.0%
Transportation and Warehousing	2.9%	2.6%	4.3%	3.5%	3.3%
Information	1.8%	1.2%	1.7%	1.7%	1.6%
Finance and Insurance	6.3%	3.1%	2.7%	2.9%	3.9%
Real Estate and Rental and Leasing	1.4%	2.1%	2.2%	1.0%	1.6%
Professional, Scientific, and Technical Services	4.6%	2.9%	6.2%	4.0%	4.4%
Management of Companies and Enterprises	1.0%	0.7%	0.8%	1.3%	1.0%
Administrative and Support and Waste Management	8.4%	4.5%	7.8%	9.3%	7.9%
Educational Services	10.2%	6.3%	7.2%	8.3%	8.3%
Health Care and Social Assistance	14.3%	15.7%	15.1%	13.8%	14.5%
Arts, Entertainment, and Recreation	1.5%	2.6%	2.1%	1.3%	1.8%
Accommodation and Food Services	10.0%	16.9%	14.5%	9.5%	12.0%
Other Services	2.9%	3.0%	3.7%	2.5%	2.9%

Source: U.S. Bureau of Labor Statistics, Quarterly Census of Employment and Wages (QCEW) Program, 2013 Annual Average Employment.

Note: Color code indicates whether or not the region industry employment to region total private employment ratio is lower or higher than the ratio of S.C. industry employment to S.C. total private employment. Green represents a higher or equal ratio than the state (Location Quotient >= 1.0), while red represents a lower ratio than the state (Location Quotient < 1.0).



In 2013, the state had more than 1.6 million jobs in the private sector economy, and one-third or 542,000 of those were in the Upstate region. Pee Dee had 17 percent of the jobs at 285,000. Health Care and Social Assistance; Retail Trade; and Manufacturing were the top three industries statewide with more than 200,000 jobs each. Notably, Upstate had 47 percent of manufacturing jobs with 103,000. The Mining sector had less than 1,000 jobs overall.

The location quotient (LQ) is a statistic that compares the ratio of industry employment to total employment in a smaller area to the industry employment to total employment ratio in a larger area. Figure 5 shows the LQ of the four regions' industries relative to the state's industries overall in a color-coded fashion. A green color indicates that the region's industry to total private employment ratio is equal to or higher than the state's similar ratio for that industry ( $LQ \geq 1.0$ ). A red color identifies an industry with a lesser concentration in the region than in the state as a whole ( $LQ < 1.0$ ).

The key industries where the Upstate region holds a competitive advantage are Manufacturing; Administrative and Support and Waste Management; and Educational Services. Smaller industries with an LQ greater than 1.0 are Wholesale Trade; Transportation and Warehousing; Information; and Management of Companies.

South Coast holds an advantage in the major industries Health Care and Social Assistance; Retail Trade; and Accommodation and Food Services. Professional, Scientific, and Technical Services; Construction; Transportation and Warehousing; Other Services; Real Estate and Rental and Leasing; Arts, Entertainment, and Recreation; and Information are smaller industries that the region has a higher concentration than the state.

For the Pee Dee region, Retail Trade; Accommodation and Food Services; and Health Care and Social Assistance are the key concentrated industries. Several smaller ones include Other Services; Arts, Entertainment, and Recreation; Real Estate and Rental and Leasing; Agriculture; and Mining.

Central region's industries with the highest LQs are: Educational Services; Administrative and Support and Waste Management; Finance and Insurance; Professional, Scientific, and Technical Services; and Wholesale Trade. Next are Information; Management of Companies; Utilities; Agriculture; and Mining.

These strengths are areas where regions must continue to train workers to meet the employers' demand for labor and coincide with state's sector strategy initiative for that purpose.



*Income, Poverty, and Educational Attainment*

Income, poverty, and educational attainment are additional indicators of the health of an area’s economy. **Figure 6** displays several statistics related to these elements for each region and for the state as a whole.

**Figure 6**

**Income, Poverty & Educational Attainment**

Measure	Values				
	Central	Pee Dee	South Coast	Upstate	Grand Total
Total Households	506,285	360,245	354,785	558,936	1,780,251
Avg Household Median Income	\$47,387	\$38,707	\$51,279	\$43,169	\$45,082
Avg Household Mean Income	\$62,489	\$52,871	\$69,222	\$58,403	\$60,602
2009-2013 Total Poverty Determined	1,290,311	916,709	905,630	1,424,764	4,537,414
2009-2013 Below Poverty Line	223,912	196,638	143,968	255,790	820,308
Percent Below Poverty Line	17.4%	21.5%	15.9%	18.0%	18.1%
Total Population Aged 25 and older	876,816	638,712	624,072	978,429	3,118,029
Less than high school graduate	120,345	112,377	76,343	172,918	481,983
High school graduate	250,630	220,027	165,290	297,285	933,232
Some college, associate's degree	264,915	186,314	188,390	281,913	921,532
Bachelor's degree or higher	240,926	119,994	194,049	226,313	781,282

Measure	Percent of Total or Above/Below the Average				
	Central	Pee Dee	South Coast	Upstate	Grand Total
Total Households	28%	20%	20%	31%	100%
Avg Household Median Income	\$2,305	-\$6,375	\$6,197	-\$1,913	\$0
Avg Household Mean Income	\$1,887	-\$7,730	\$8,620	-\$2,199	\$0
2009-2013 Total Poverty Determined	28%	20%	20%	31%	100%
2009-2013 Below Poverty Line	27%	24%	18%	31%	100%
Percent Below Poverty Line	-0.7%	3.4%	-2.2%	-0.1%	0.0%
Total Population Aged 25 and older	28%	20%	20%	31%	100%
Less than high school graduate	14%	18%	12%	18%	15%
High school graduate	29%	34%	26%	30%	30%
Some college, associate's degree	30%	29%	30%	29%	30%
Bachelor's degree or higher	27%	19%	31%	23%	25%

Source: U.S. Census Bureau, American Community Survey (ACS) 2009-2013 5-Year Estimate

Of the 1.780 million households in the state, Upstate had 31 percent, followed by Central with 28 percent, Pee Dee and South Coast with 20 percent each. The average income statistics varied widely by region. The average annual median income varied from \$38,707 for the Pee Dee to \$51,279 for the South Coast region, a range of more than \$12,500. The range for the average annual mean income was even larger at over \$16,300. Pee Dee’s average was \$52,871, while South Coast’s was \$69,222.

South Carolina had over 820,000 people living below the poverty level over the 2009-2013 estimate period or 18.1 percent of the population. Pee Dee was the only region with a higher rate

of poverty than the state at 21.5 percent but actually had fewer people living below the poverty level than either the Central or Upstate regions.

The Central region had more people holding a Bachelor's degree or higher at 241,000 than did the other regions. Upstate had 226,000 or 23 percent of its population with the highest levels of education. Statewide 25 percent of the population held those degrees. On the opposite side of the educational spectrum, Pee Dee and Upstate each had 18 percent of their populations having an education level of less than high school. Pee Dee had the higher percent of its population with a high school education at 34 percent, while each of the regions had 29 or 30 percent of their populations falling in the "Some college or Associate's degree" category.

### *In-demand Occupations*

In-demand occupations show which jobs are most required by an area's employers that advertise online. This statistic is referred to as "real-time labor market information (LMI)" because the data is updated monthly and keeps up with the changing job market. **Figure 7** shows the number and percentage breakdown by major occupational group of Help Wanted Online® job advertisements for 2014.

The state overall had 60,000 average monthly job ads posted in 2014. Central, South Coast, and Upstate each had 28 or 29 percent of the ads, while Pee Dee had 15 percent.

Central's top occupation groups in demand were Healthcare Practitioners; Sales, Office and Administrative Support; and Computer and Mathematical. For the latter group, Central far outpaced the other regions demanding these occupations.

Pee Dee's top demanded occupation group was Sales with 17 percent, followed by Healthcare Practitioners; Office and Administrative Support; and Transportation and Material Moving.

Leading occupations were in Sales; Office and Administrative Support; and Healthcare Practitioners for the South Coast region. For the Upstate region, Sales; Healthcare Practitioners; and Office and Administrative Support were the top occupations demanded by area employers.

Figure 7

In-Demand Occupations

Measure	Values				
	Central	Pee Dee	South Coast	Upstate	Grand Total
Architecture and Engineering	8,475	3,273	4,511	10,878	27,137
Arts, Design, Entertainment, Sports, and Media	3,698	2,058	4,434	3,349	13,539
Building and Grounds Cleaning and Maintenance	4,097	4,770	7,497	4,617	20,981
Business and Financial Operations	9,697	2,547	5,920	7,752	25,916
Community and Social Services	4,201	1,244	1,978	2,571	9,994
Computer and Mathematical	19,932	2,663	11,656	12,502	46,753
Construction and Extraction	6,237	4,346	10,593	7,066	28,242
Education, Training, and Library	6,397	2,804	7,154	4,028	20,383
Farming, Fishing, and Forestry	179	157	214	228	778
Food Preparation and Serving Related	6,074	6,686	17,538	7,320	37,618
Healthcare Practitioners and Technical	29,222	14,382	20,411	23,350	87,365
Healthcare Support	5,370	2,705	4,465	5,293	17,833
Installation, Maintenance, and Repair	11,022	6,822	12,207	13,113	43,164
Legal	1,007	390	875	478	2,750
Life, Physical, and Social Science	1,443	475	939	1,212	4,069
Management	16,092	6,967	12,162	13,929	49,150
Office and Administrative Support	20,817	11,848	22,850	19,922	75,437
Personal Care and Service	2,526	2,371	4,363	3,198	12,458
Production	6,696	3,151	4,902	12,255	27,004
Protective Service	2,252	1,119	1,869	1,296	6,536
Sales and Related	26,480	19,207	28,971	27,803	102,461
Transportation and Material Moving	17,277	10,604	15,684	20,206	63,771
<b>Total 2014 Jobs Posted</b>	<b>209,191</b>	<b>110,589</b>	<b>201,193</b>	<b>202,366</b>	<b>723,339</b>
Avg 2014 Monthly Job Postings	17,433	9,216	16,766	16,864	60,278

Measure	Percent of Total or Above/Below the Average				
	Central	Pee Dee	South Coast	Upstate	Grand Total
Architecture and Engineering	4%	3%	2%	5%	4%
Arts, Design, Entertainment, Sports, and Media	2%	2%	2%	2%	2%
Building and Grounds Cleaning and Maintenance	2%	4%	4%	2%	3%
Business and Financial Operations	5%	2%	3%	4%	4%
Community and Social Services	2%	1%	1%	1%	1%
Computer and Mathematical	10%	2%	6%	6%	6%
Construction and Extraction	3%	4%	5%	3%	4%
Education, Training, and Library	3%	3%	4%	2%	3%
Farming, Fishing, and Forestry	0%	0%	0%	0%	0%
Food Preparation and Serving Related	3%	6%	9%	4%	5%
Healthcare Practitioners and Technical	14%	13%	10%	12%	12%
Healthcare Support	3%	2%	2%	3%	2%
Installation, Maintenance, and Repair	5%	6%	6%	6%	6%
Legal	0%	0%	0%	0%	0%
Life, Physical, and Social Science	1%	0%	0%	1%	1%
Management	8%	6%	6%	7%	7%
Office and Administrative Support	10%	11%	11%	10%	10%
Personal Care and Service	1%	2%	2%	2%	2%
Production	3%	3%	2%	6%	4%
Protective Service	1%	1%	1%	1%	1%
Sales and Related	13%	17%	14%	14%	14%
Transportation and Material Moving	8%	10%	8%	10%	9%
<b>Total 2014 Jobs Posted</b>	<b>29%</b>	<b>15%</b>	<b>28%</b>	<b>28%</b>	<b>100%</b>
2014 Avg Monthly Job Postings	29%	15%	28%	28%	100%

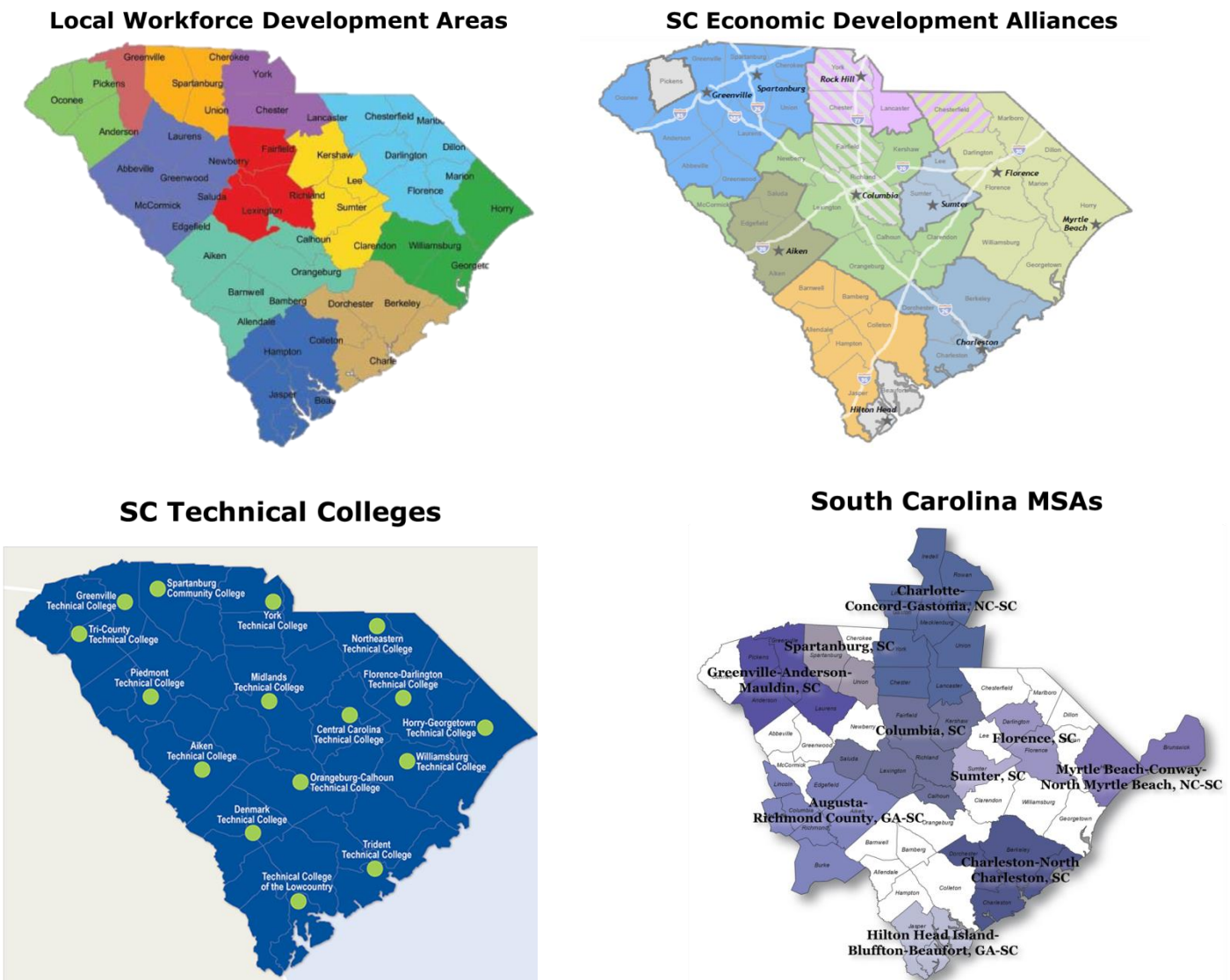
Source: The Conference Board, Help Wanted Online® Data Series (HWOL), 2014 Annual Data

Note: Values are total 2014 job postings by occupation group.

*Geographic boundaries*

Several geographic boundaries were considered in the development of the final regional system. Maintaining the integrity of the state’s 12 Workforce Development Areas and 16 Technical College Service Areas, as the primary service delivery mechanisms of the workforce system, was a high priority in determining the regional system. Also examined in the regional development process was the state economic development alliance as well as the state Metropolitan Statistical Area (MSA) boundaries. **Figure 8** highlights these separate geographies.

**Figure 8**



*Required Language*

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