

PEE DEE LWIA WORKFORCE REPORT 2012



The *Pee Dee 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 Pee Dee Local Workforce Investment Area (LWIA) are Health Care and Social Assistance and Manufacturing. Employment growth is anticipated by 2018 in several industries, especially Health Care and Social Assistance and Educational Services. The highest wages are paid by the Utilities and Professional, Scientific, and Technical Services industries.

The Pee Dee LWIA's population has grown by under one percent per year since 2000 and has fewer residents aged 20 to 29 than the state's average.

Employment is rising and unemployment is declining. Pee Dee LWIA has a historically higher unemployment rate than the state, and it remained so during and after the recession. Employment is concentrated in the Florence area, and nearly 4,000 more people leave the Pee Dee for work than enter it every day. Manufacturing and Administrative and Support and Waste Management are the largest two industries represented in unemployment claims. The latter sector includes office administrative services; facilities support services; employment services; services to buildings and dwellings; and waste collection, treatment, and disposal services.

Pee Dee has a lower proportion of residents with more than a high school education than the state does as a whole. For projected growing jobs, 2 percent require no high school diploma or GED, 28 percent require a high school diploma or GED, 30 percent require an associate's degree or training, and 40 percent require a bachelor's degree or higher.

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

While there are some bright spots for the Pee Dee LWIA, it has significant challenges ahead. A barely growing population, high unemployment rates, low bachelor's degree attainment, and economic stagnation are all negatively impacting the area. The patterns and trends described in this report offer cause for both optimism and concern. While some metrics are improving, several issues will require attention and planning to ensure future growth and prosperity for the Pee Dee LWIA.

INTRODUCTION

The Pee Dee Local Workforce Investment Area is composed of Chesterfield, Darlington, Dillon, Florence, Marion, and Marlboro counties and is located in the eastern part of the state. The LWIA borders North Carolina and is home to the Sandhills National Wildlife Refuge, the Darlington Raceway, and Sandhills State Forest.

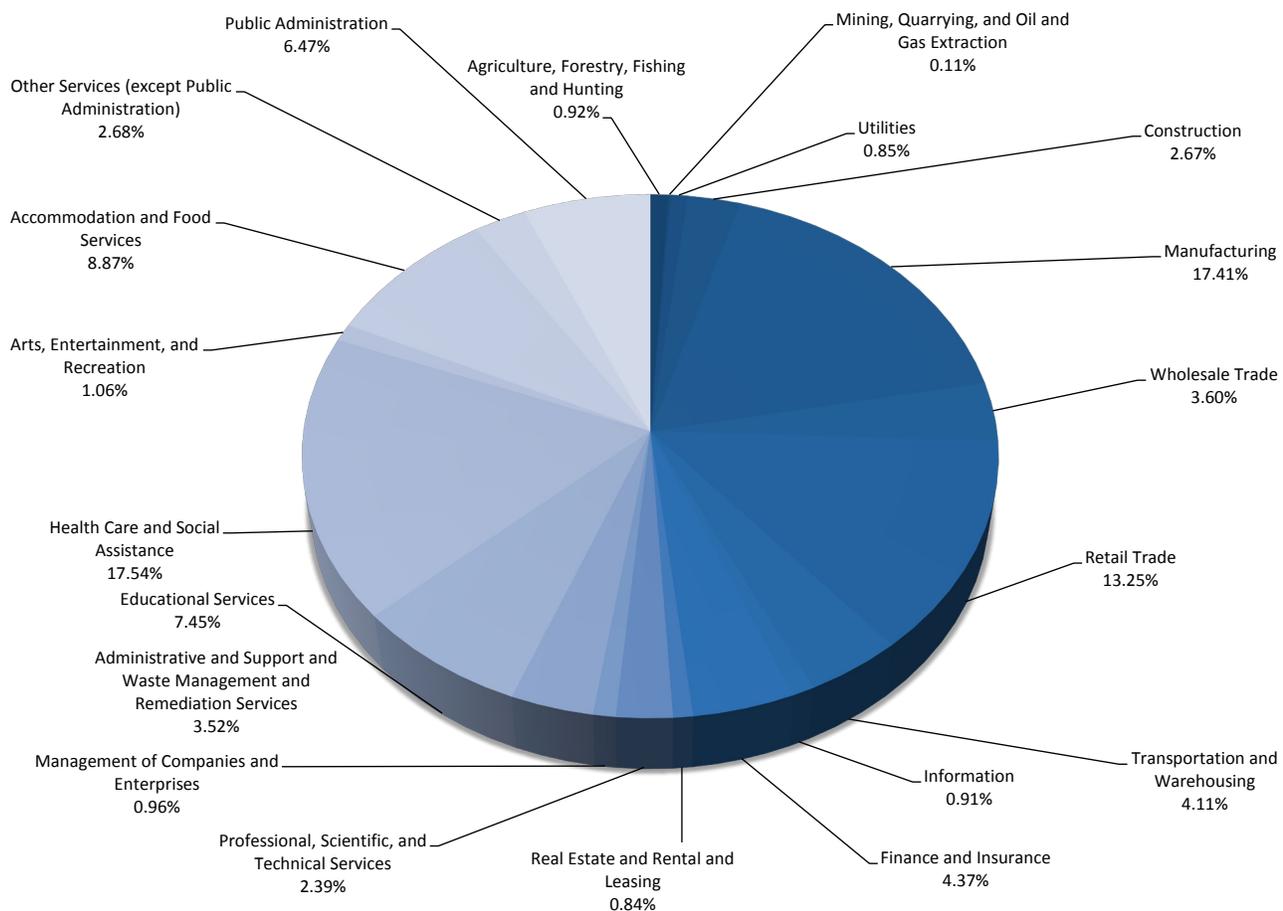
The economic changes this year in the Pee Dee LWIA demonstrate the shifting needs of employers and employees. Cultivating an understanding of the workforce allows all six counties to respond to anticipated future needs. Analyses help to identify the gap between what the workforce has in the way of talent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

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

ECONOMIC DISCUSSION: A CURRENT PICTURE OF THE WORKFORCE

EMPLOYMENT BY INDUSTRY

Figure 1: Pee Dee LWIA Employment By Industry - 3rd Quarter 2012



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

Health Care and Social Assistance and Manufacturing are the top two industries employing workers in the Pee Dee LWIA. Industries like Educational Services and Health Care and Social Assistance are healthy and flourishing, while others like Construction are still recovering from the recession. The 2010 per capita income for a Pee Dee LWIA resident was \$26,654, which was an increase of 31.9 percent from 2000.¹ Economic growth has taken place in the past decade to enhance the LWIA workforce, although the area is still recovering from a tough business cycle.

LOCATION QUOTIENT

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

Figure 2: Notable Pee Dee LWIA Location Quotients - 2011

Industry and Sectors	Location Quotient
<i>Chesterfield County</i>	
Textile Mills	47.3
Fabricated Metal Product Manufacturing	16.3
Forestry and Logging	7.6
<i>Darlington County</i>	
Forestry and Logging	4.3
Repair and Maintenance	3.5
Manufacturing	2.3
<i>Dillon County</i>	
Miscellaneous Retail Stores	5.6
Gasoline Stations	3.2
Manufacturing	2.6
<i>Florence County</i>	
Forestry and Logging	7.1
Chemical Manufacturing	4.2
Paper Manufacturing	3.8
<i>Marion County</i>	
Transportation Equipment Manufacturing	7.8
Forestry and Logging	6.7
Wood Product Manufacturing	4.2
<i>Marlboro County</i>	
Manufacturing	4.3
Gasoline Stations	2.8
Crop Production	2.3

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

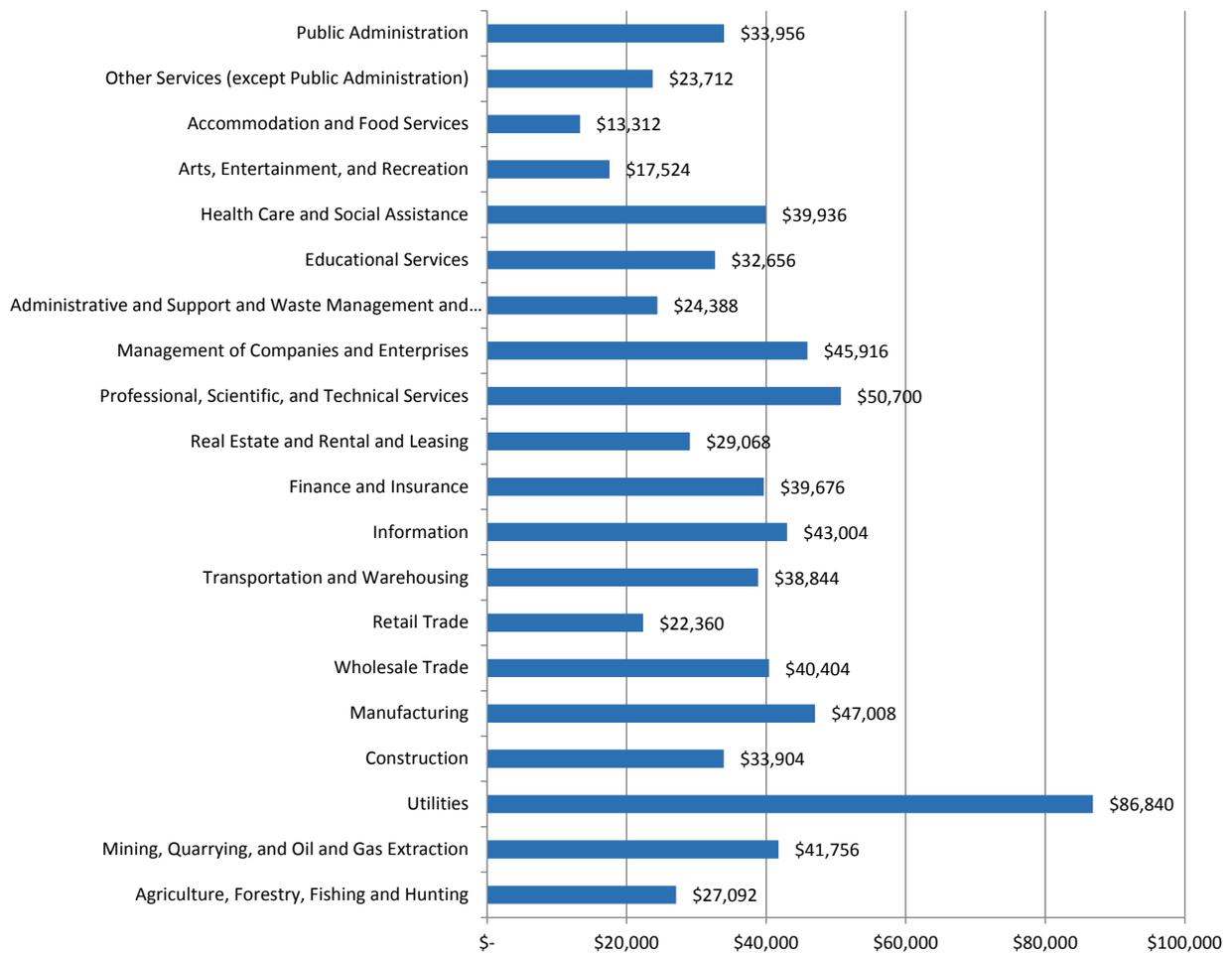
Textile Mills have the highest location quotient in the area at 47.3 in Chesterfield County. Manufacturing industries are among the most concentrated sectors in this area with location quotients from 2.3 to 16.3. These industries located throughout the area include Paper, Fabricated Metal Product, Chemical, Wood Product, and Transportation Equipment. Other notable sectors in the Pee Dee LWIA are Repair and Maintenance in Darlington County, Miscellaneous Retail Stores in Dillon County, Crop Production in Marlboro County, and Forestry and Logging throughout the Pee Dee LWIA.

AVERAGE ANNUAL WAGE BY INDUSTRY

The annual wages for the Utilities sector employees are the highest for any Pee Dee LWIA industry. Professional, Scientific, and Technical Service workers are the second highest paid group of employees in the area.

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

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



Source: BLS, SCDEW, QCEW

OCCUPATIONAL EMPLOYMENT

When examining the current occupational employment in the area, one can observe that some of the top 20 occupations are low-skill, low-pay jobs. These jobs, like Cashiers, Stock Clerks, 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, First-Line Supervisors, and School Teachers, that pay a higher wage. With Health Care and Social Assistance, Manufacturing, and Retail Trade sectors comprising over 48 percent of the employment in the Pee Dee LWIA, the positions of Retail Salespersons; Elementary School Teachers; and Registered Nurses, not surprisingly, are listed among the top occupations.

Figure 4: Top 20 Occupations with Wages - 2012

Occupational Title	Total Employment	Hourly Average Wage (\$)
All Occupations	44,100	15.96
Cashiers	1,900	8.54
Combined Food Preparation and Serving Workers, Including Fast Food	1,360	8.14
Team Assemblers	1,080	14.37
Retail Salespersons	1,060	11.14
Correctional Officers and Jailers	1,010	15.22
Registered Nurses	860	25.94
Textile Winding, Twisting, and Drawing Out Machine Setters, Operators, and Tenders	860	12.86
Elementary School Teachers, Except Special Education	820	21.43
Teacher Assistants	820	9.36
Office Clerks, General	780	10.93
Nursing Assistants	770	9.65
Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	760	12.49
Laborers and Freight, Stock, and Material Movers, Hand	760	13.14
Packers and Packagers, Hand	760	12.03
Secondary School Teachers, Except Special and Career/Technical Education	690	21.98
Stock Clerks and Order Fillers	650	11.64
First-Line Supervisors of Retail Sales Workers	590	18.39
Maintenance and Repair Workers, General	560	15.58
Customer Service Representatives	550	13.12
Janitors and Cleaners, Except Maids and Housekeeping Cleaners	530	9.90

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 Pee Dee 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 - Pee Dee 2012

Skillset: LOW
Cashiers
Combined Food Preparation and Serving Workers, Including Fast Food
Cooks, Fast Food
Cooks, Institution and Cafeteria
Customer Service Representatives
Home Health Aides
Industrial Truck and Tractor Operators
Janitors and Cleaners, Except Maids and Housekeeping Cleaners
Laborers and Freight, Stock, and Material Movers, Hand
Landscaping and Groundskeeping Workers
Maids and Housekeeping Cleaners
Office Clerks, General
Packers and Packagers, Hand
Personal Care Aides
Retail Salespersons
Secretaries and Administrative Assistants, Except Legal, Medical, and Executive
Sewing Machine Operators
Shipping, Receiving, and Traffic Clerks
Social and Human Service Assistants
Stock Clerks and Order Fillers
Teacher Assistants
Tellers
Waiters and Waitresses
Skillset: MIDDLE
Bookkeeping, Accounting, and Auditing Clerks
Correctional Officers and Jailers
Cutting, Punching, and Press Machine Setters, Operators, and Tenders, Metal and Plastic
Electricians
Emergency Medical Technicians and Paramedics
First-Line Supervisors of Food Preparation and Serving Workers
First-Line Supervisors of Office and Administrative Support Workers
First-Line Supervisors of Production and Operating Workers
First-Line Supervisors of Retail Sales Workers
General and Operations Managers
Heavy and Tractor-Trailer Truck Drivers
Industrial Machinery Mechanics
Inspectors, Testers, Sorters, Samplers, and Weighers
Licensed Practical and Licensed Vocational Nurses
Machinists
Maintenance and Repair Workers, General
Nursing Assistants
Police and Sheriff's Patrol Officers
Registered Nurses
Sales Representatives, Wholesale and Manufacturing, Except Technical and Scientific Products
Substitute Teachers
Team Assemblers
Textile Winding, Twisting, and Drawing Out Machine Setters, Operators, and Tenders
Skillset: HIGH
Child, Family, and School Social Workers
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)

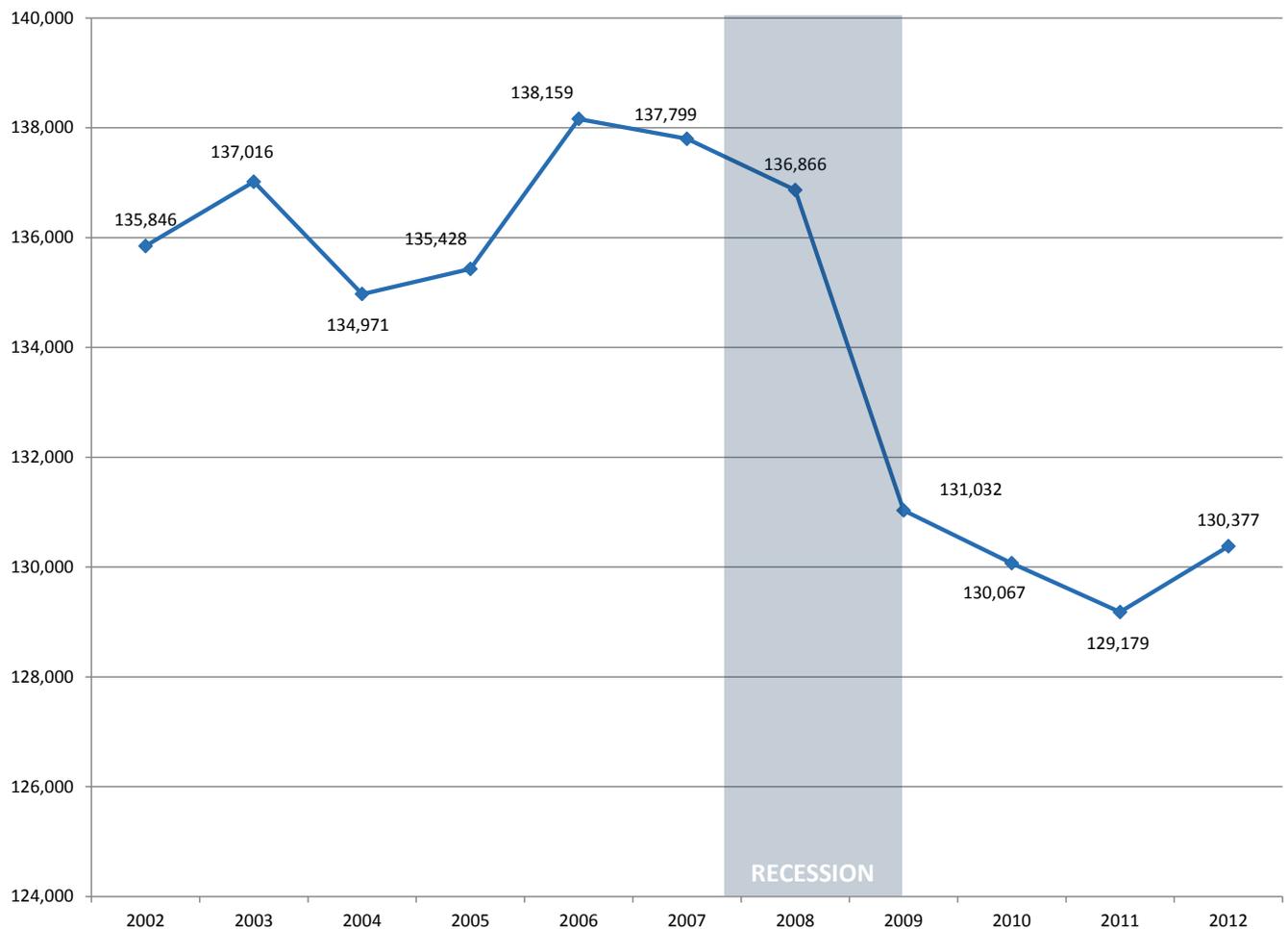
EMPLOYMENT AND UNEMPLOYMENT

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

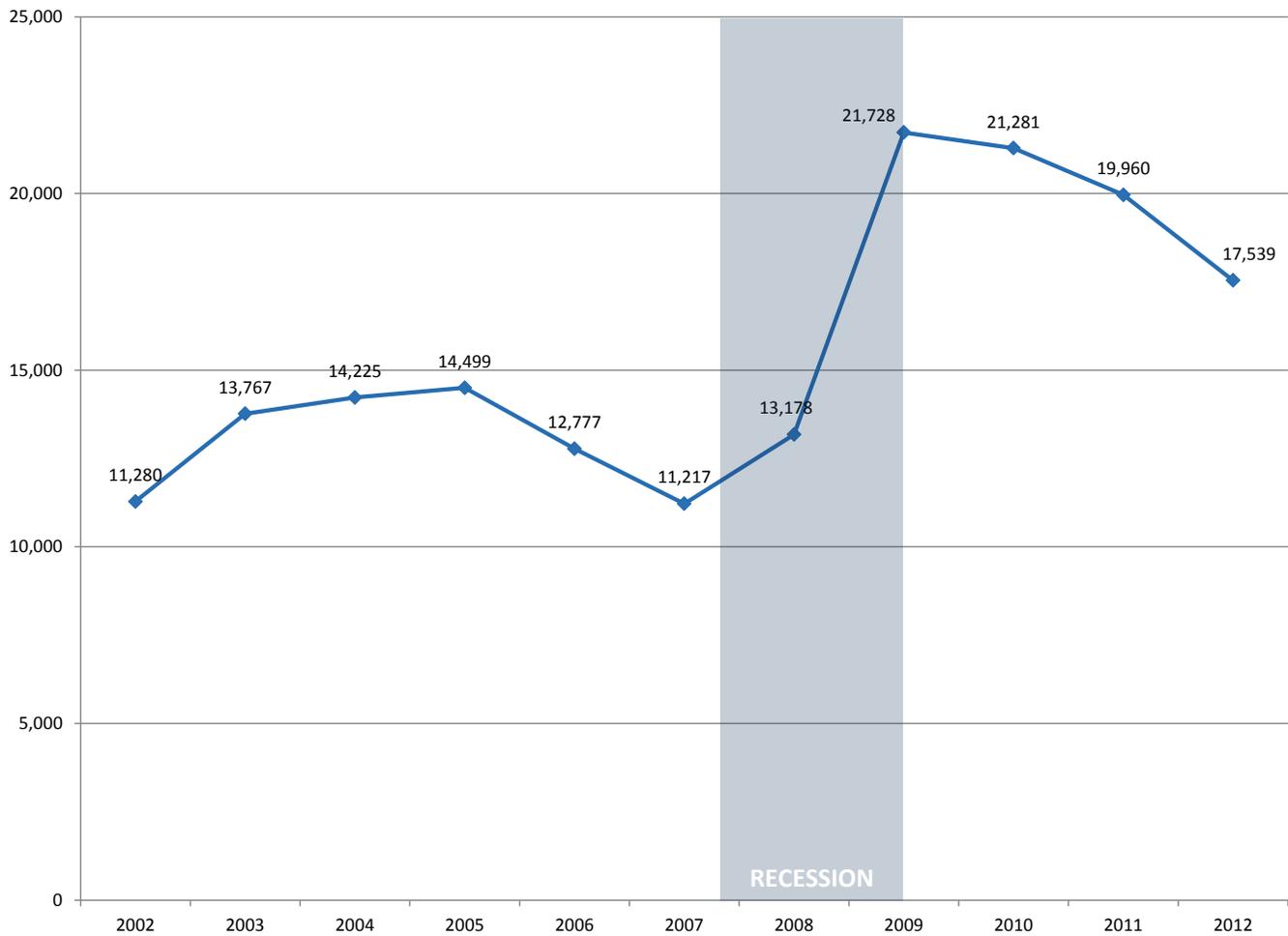
In Figure 6, the recession (officially from December 2007 through June 2009) had a great effect on the labor force. Employment dropped, and unemployment increased by 94 percent.

Figure 6: Employment - 2002-2012



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

Figure 7: Unemployment - 2002-2012

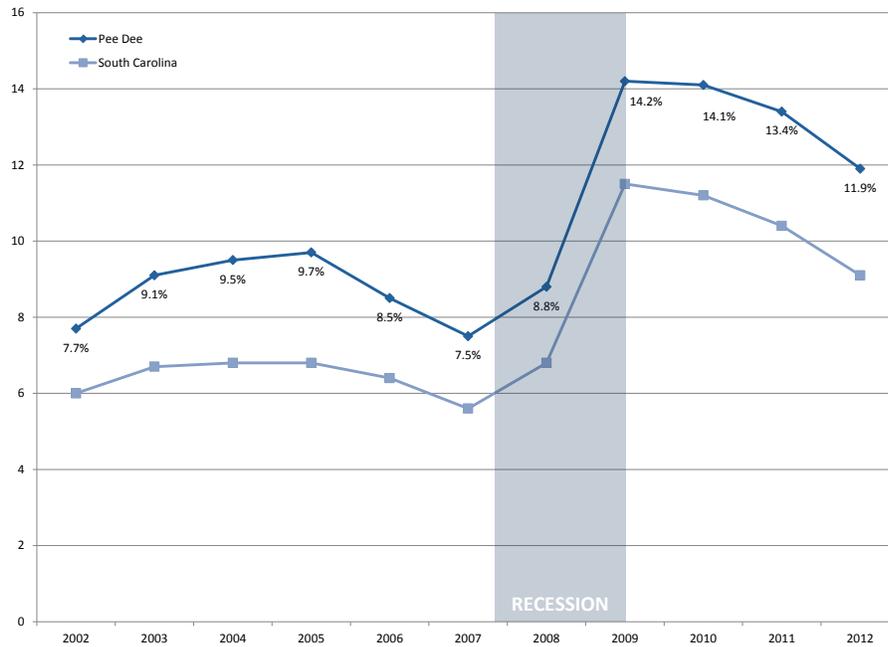


Source: BLS, SCDEW, LAUS

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 Pee Dee LWIA area and South Carolina. Pee Dee has historically been above the state’s rate, and this was the same during and after the recession. During the recession, the Pee Dee rate increased sharply from 7.5 percent in 2007 to 14.2 percent in 2009.

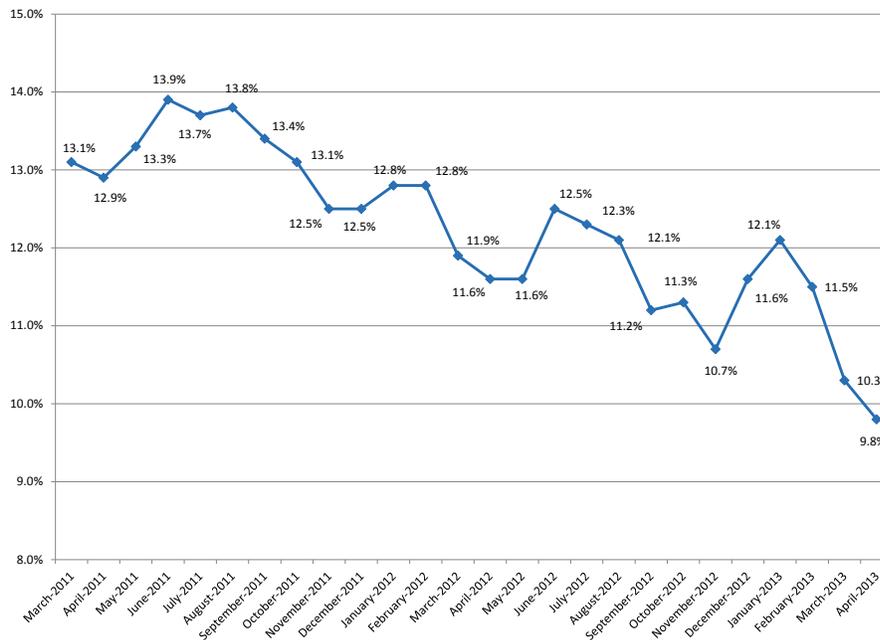
Figure 8: Annual Unemployment - 2002-2012



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



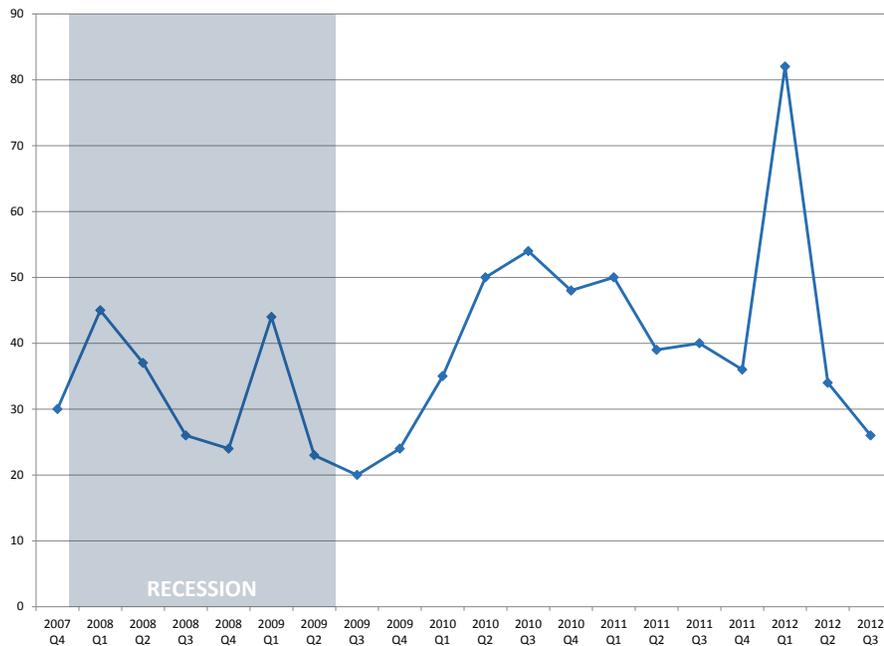
Source: BLS, SCDEW, LAUS

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 steady in the area with a large increase in early 2012.

Figure 10: New Startup Firms - 2007-2012



Source: BLS, SCDEW, QCEW

EMPLOYERS BY SIZE OF ESTABLISHMENT

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

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

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

Employees	Pee Dee	South Carolina
0 to 4	3,060	63,766
5 to 9	1,299	19,667
10 to 19	842	13,316
20 to 49	594	9,881
50 to 99	214	3,907
100 to 249	130	2,433
250 to 499	41	757
500 to 999	13	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 the Pee Dee LWIA need? Seven streams of workforce supply provide an indication: population, commuting, education of the population, clusters of high school students, awards earned at higher education institutions, and characteristics of unemployment insurance claims and claimants.

POPULATION BY AGE

Age distribution in the area is similar to the state and the country for most segments of the population. In the 20-29 age cohorts, Pee Dee has a lower proportion of population than the state as a whole does, and in the 50-64 age cohorts, the area has a higher proportion of population than the state.

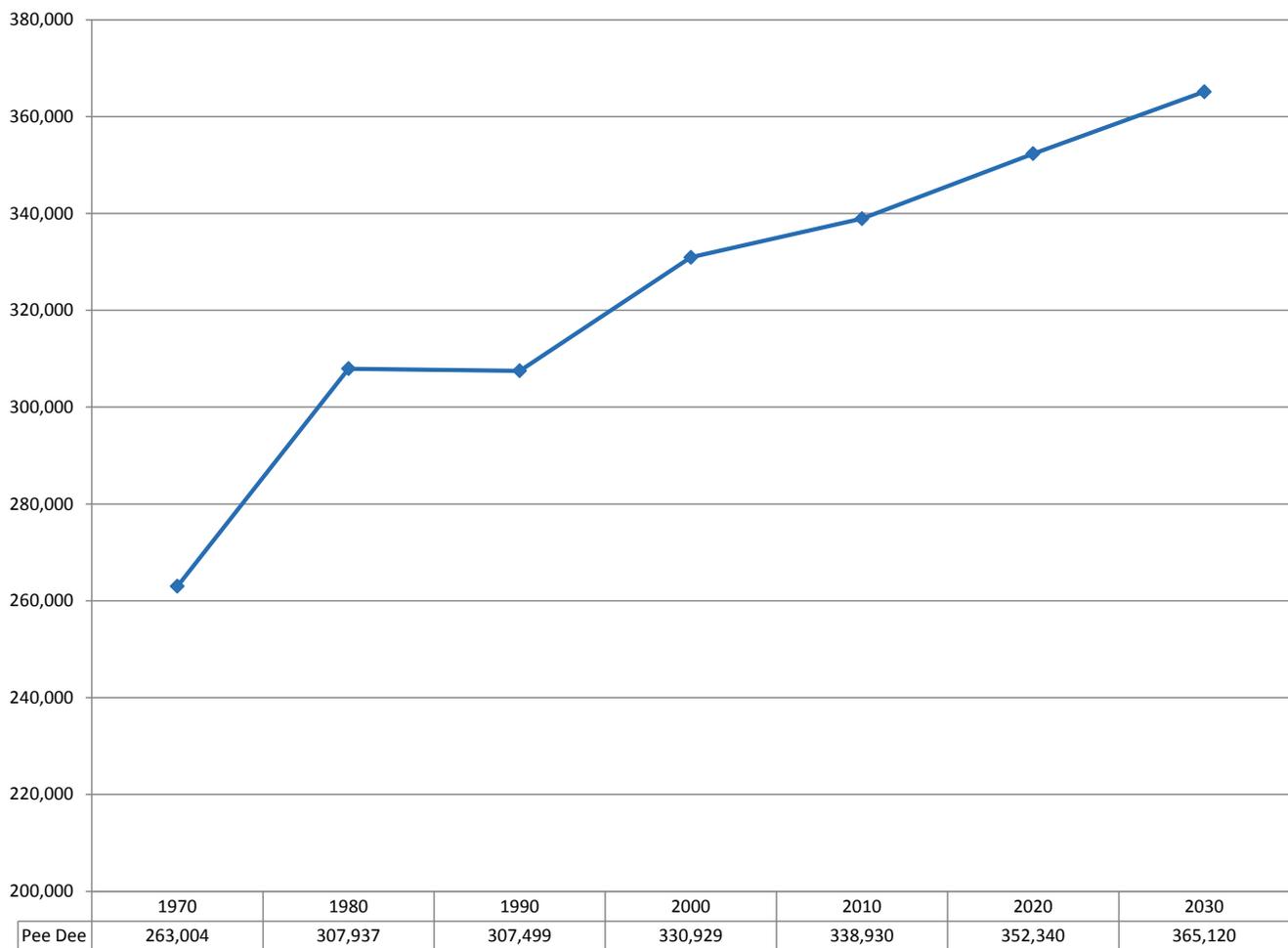
Figure 12: Population by Age

Age Range	Pee Dee	SC	US
0-4	6.6%	6.5%	6.6%
5-9	6.9%	6.4%	6.6%
10-14	6.8%	6.5%	6.7%
15-19	7.2%	7.2%	7.2%
20-24	6.3%	7.2%	7.0%
25-29	5.9%	6.6%	6.8%
30-34	6.2%	6.2%	6.4%
35-39	6.5%	6.5%	6.6%
40-44	6.7%	6.8%	7.0%
45-49	7.2%	7.2%	7.4%
50-54	7.4%	7.0%	7.2%
55-59	6.9%	6.5%	6.3%
60-64	6.1%	5.9%	5.3%
65-69	4.5%	4.5%	3.9%
70-74	3.3%	3.3%	3.0%
75-79	2.3%	2.5%	2.4%
80-84	1.8%	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 small increase in population from 1990 to 2000 (up 7.6 percent), the growth of the population of this area slowed, growing just over 2 percent over the next 10 years. Growth is projected to continue to increase less than 1 percent per year to 2030.

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

	Total	Moved From Different State	Moved From Abroad	Moved From Different County	Moved Within Same County
Population 1 year and over	340,577	2.2%	0.2%	2.6%	8.2%
Hispanic or Latino origin (of any race)	7,718	4.6%	1.0%	5.2%	10.1%
White alone, not Hispanic or Latino	178,951	2.3%	0.1%	2.5%	6.6%
Population 25 Years and Over					
Less than high school graduate	51,683	1.7%	0.2%	2.5%	7.5%
High school graduate/GED	85,389	1.7%	0.1%	2.2%	7.2%
Some college or associate's degree	56,119	2.2%	0.1%	2.2%	5.8%
Bachelor's degree	23,270	2.7%	0.2%	2.0%	4.7%
Graduate or professional degree	12,168	2.0%	0.7%	1.5%	3.7%

Source: US Census Bureau, ACS, SCDEW

In-migration (people moving into Pee Dee) shows that less than 3 percent of residents with a graduate degree and 2.9 percent of those with a bachelor’s degree came from out of state or out of the country. While Hispanics moved into Pee Dee LWIA from a different state at twice the rate of Whites, they moved into Pee Dee from abroad at 10 times the rate of Whites. As 13 percent of residents over the age of one moved, only 2.4 percent came from outside of South Carolina.

COMMUTING PATTERNS

The vast majority of the workers (81 percent) of the Pee Dee lives and works in the LWIA. The tables in Figure 15 show that nearly 12,000 workers commute in from other areas to work in the LWIA. Horry County draws a notable portion of Pee Dee LWIA’s residents out of the area to work. Over 4,000 more employees leave the area to work than commute into it.

Figure 15: Commuting Patterns - 2010

To Pee Dee WIA From	11,979	From Pee Dee WIA To	16,038
Williamsburg County, SC	1,709	Horry County, SC	2,638
Horry County, SC	1,612	Union County, NC	2,099
Lee County, SC	1,009	Williamsburg County, SC	1,746
Sumter County, SC	931	Scotland County, NC	1,011
		Richmond County, NC	654

Source: US Census Bureau, ACS

EDUCATIONAL ATTAINMENT

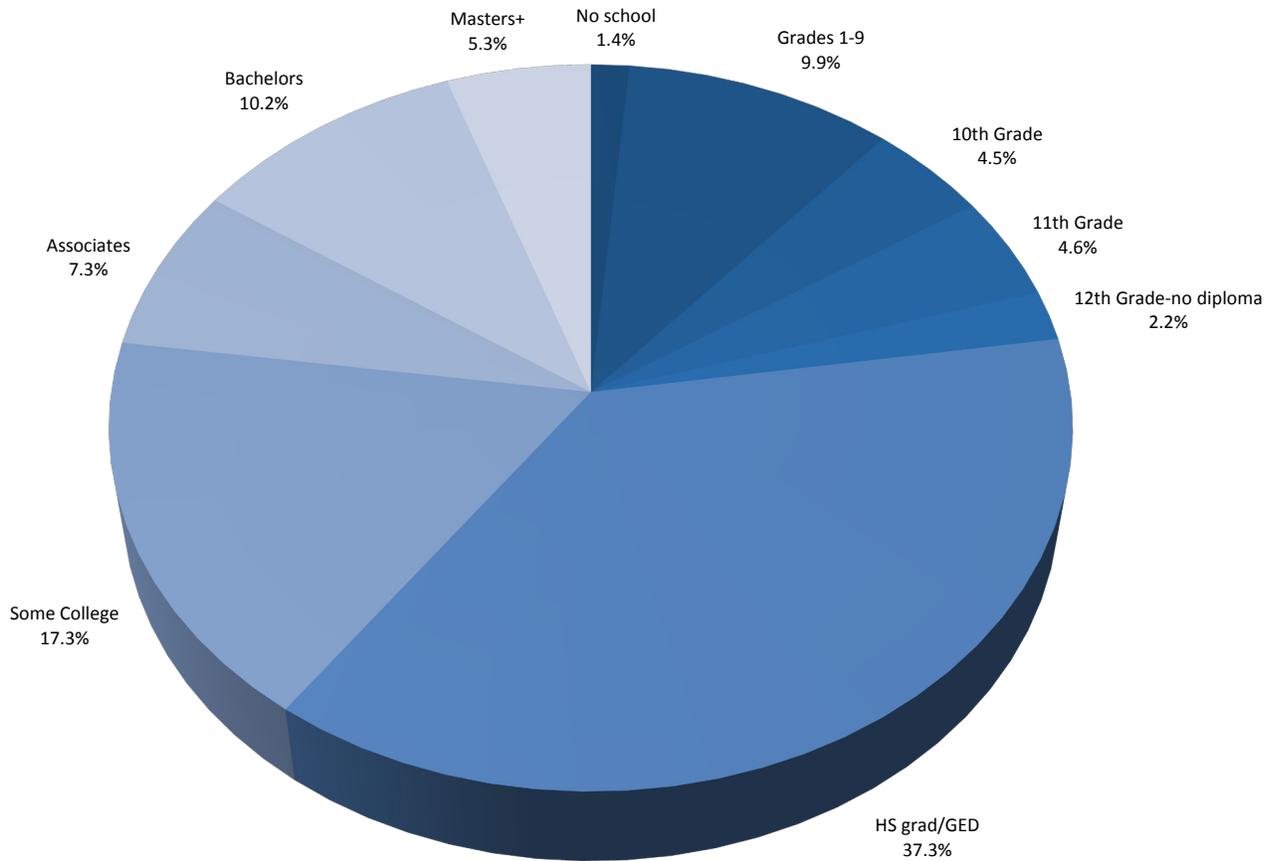
The Pee Dee LWIA has a higher concentration of residents with a high school diploma or GED or less when compared to the state as a whole but a lower concentration with more than a high school education than the state overall.

Figure 16: Educational Attainment - Pee Dee and South Carolina 2011

Education Level	Pee Dee	SC
No school	1.4	1.1
Grades 1-9	9.9	7.0
10th Grade	4.5	3.3
11th Grade	4.6	3.2
12th Grade-no diploma	2.2	1.8
HS grad/GED	37.3	30.9
Some College	17.3	20.1
Associates	7.3	8.4
Bachelors	10.2	15.6
Masters+	5.3	8.6

Source: US Census Bureau, ACS

Figure 17: Educational Attainment - Pee Dee 2011

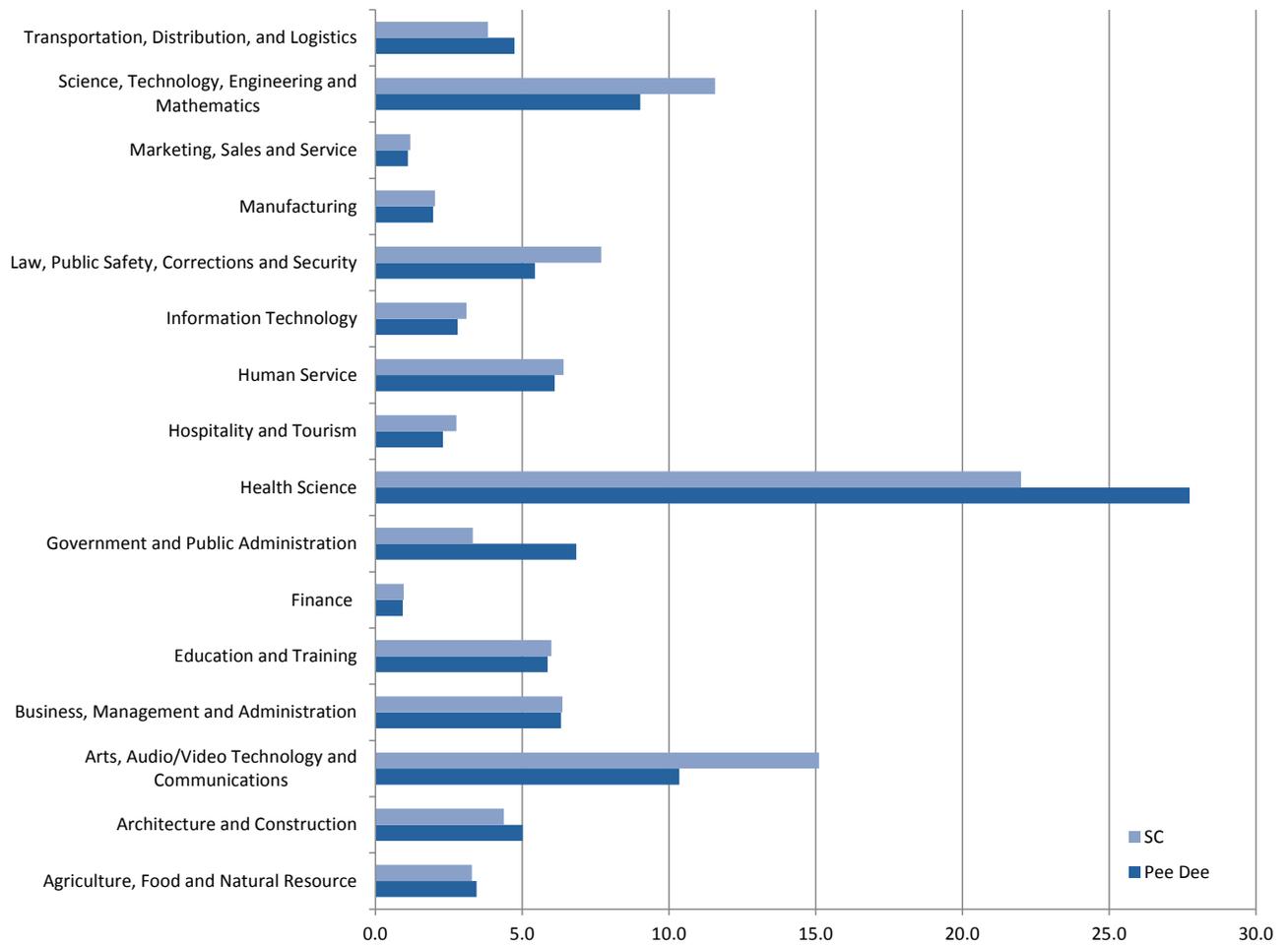


Source: US Census Bureau, ACS, SCDEW

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 Pee Dee and SC - 2012



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

Source: SC Department of Education

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

Figure 19: Career Clusters - 2012

Cluster	Pee Dee	SC
Agriculture, Food and Natural Resource	3.4	3.3
Architecture and Construction	5.0	4.4
Arts, Audio/Video Technology and Communications	10.4	15.1
Business, Management and Administration	6.3	6.4
Education and Training	5.9	6.0
Finance	0.9	1.0
Government and Public Administration	6.8	3.3
Health Science	27.7	22.0
Hospitality and Tourism	2.3	2.8
Human Service	6.1	6.4
Information Technology	2.8	3.1
Law, Public Safety, Corrections and Security	5.4	7.7
Manufacturing	2.0	2.0
Marketing, Sales and Service	1.1	1.2
Science, Technology, Engineering and Mathematics	9.0	11.6
Transportation, Distribution, and Logistics	4.7	3.8

Source: SC Department of Education

DEGREES AWARDED

In higher education, Pee Dee area colleges and universities have conferred a wide variety of awards. Of the top 20, Registered Nursing is the most popular followed by Business Administration and Management and Liberal Arts and Sciences. The institutions included in this data are Coker College, Florence-Darlington Technical College, Francis Marion University, and Northeastern Technical College.

Figure 20: Top 20 Majors in Pee Dee - 2011

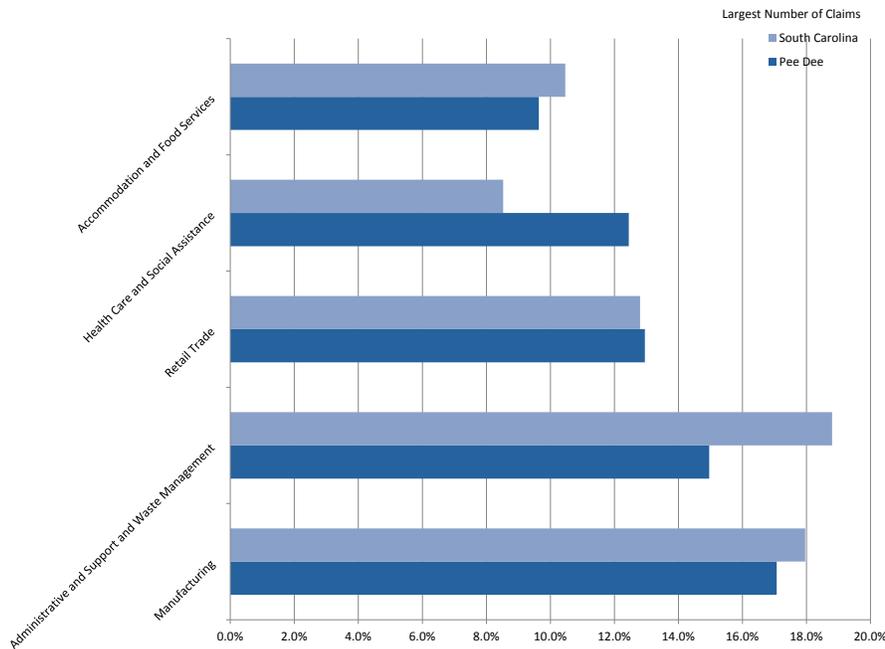
Majors	
Registered Nursing/Registered Nurse	128
Business Administration and Management, General	103
Liberal Arts and Sciences/Liberal Studies	103
Biology/Biological Sciences, General	87
Nursing - Registered Nurse Training, BSN Generic	78
Psychology, General	73
Business/Commerce, General	72
Social Work	66
Welding Technology/Welder	61
Accounting	56
Sociology	53
Elementary Education and Teaching	41
Licensed Practical/Vocational Nurse Training	41
Sales, Distribution, and Marketing Operations	39
Machine Tool Technology/Machinist	38
Criminal Justice/Safety Studies	37
Legal Assistant/Paralegal	33
Special Education and Teaching, Other	33
Electrical, Electronic and Communications Engineer	30
Administrative Assistant and Secretarial Science	29

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 Pee Dee LWIA area, the highest number of claims is filed in the Manufacturing sector followed by Administrative and Support and Waste Management industry and the Retail Trade group. The Administrative and Support and Waste Management group includes office administrative services; facilities support services; employment services; services to buildings and dwellings; and waste collection, treatment, and disposal services. These sectors highlight the diverse industries in the economy of the Pee Dee LWIA and their support.

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



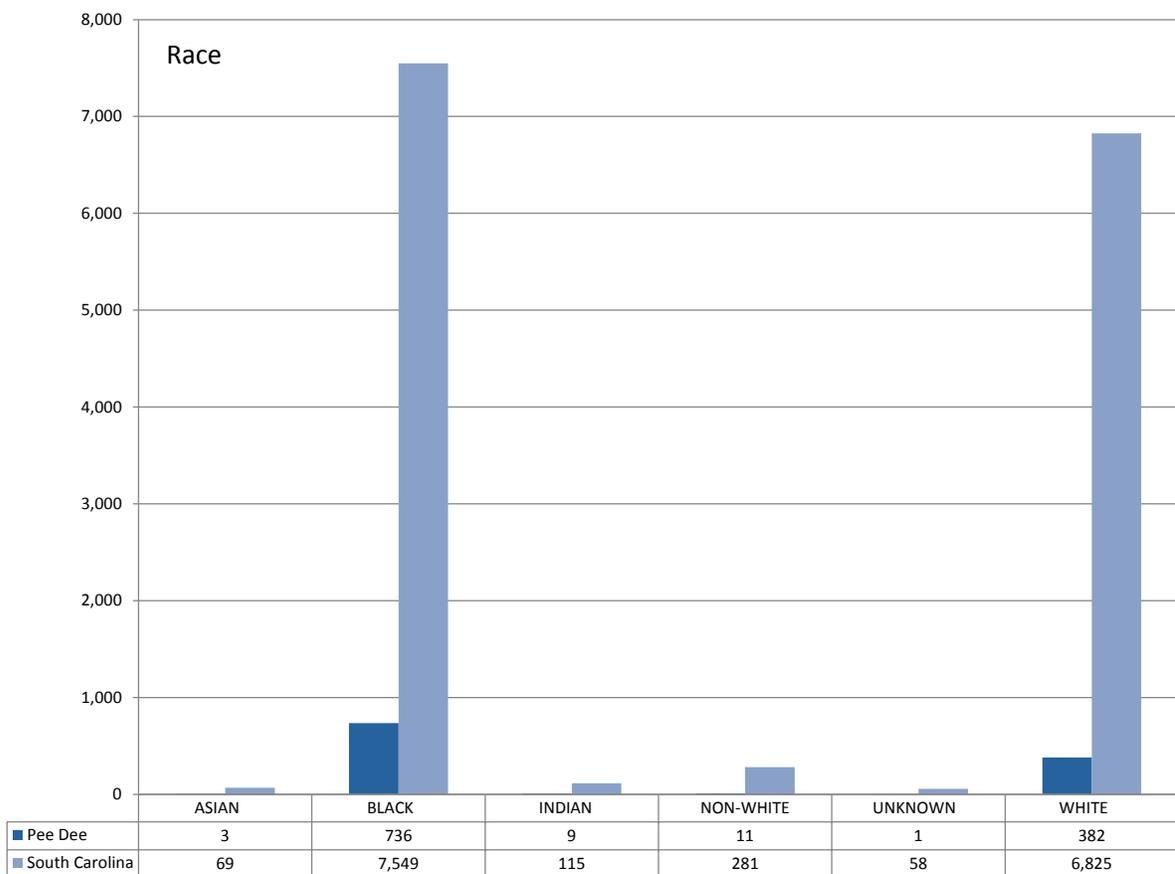
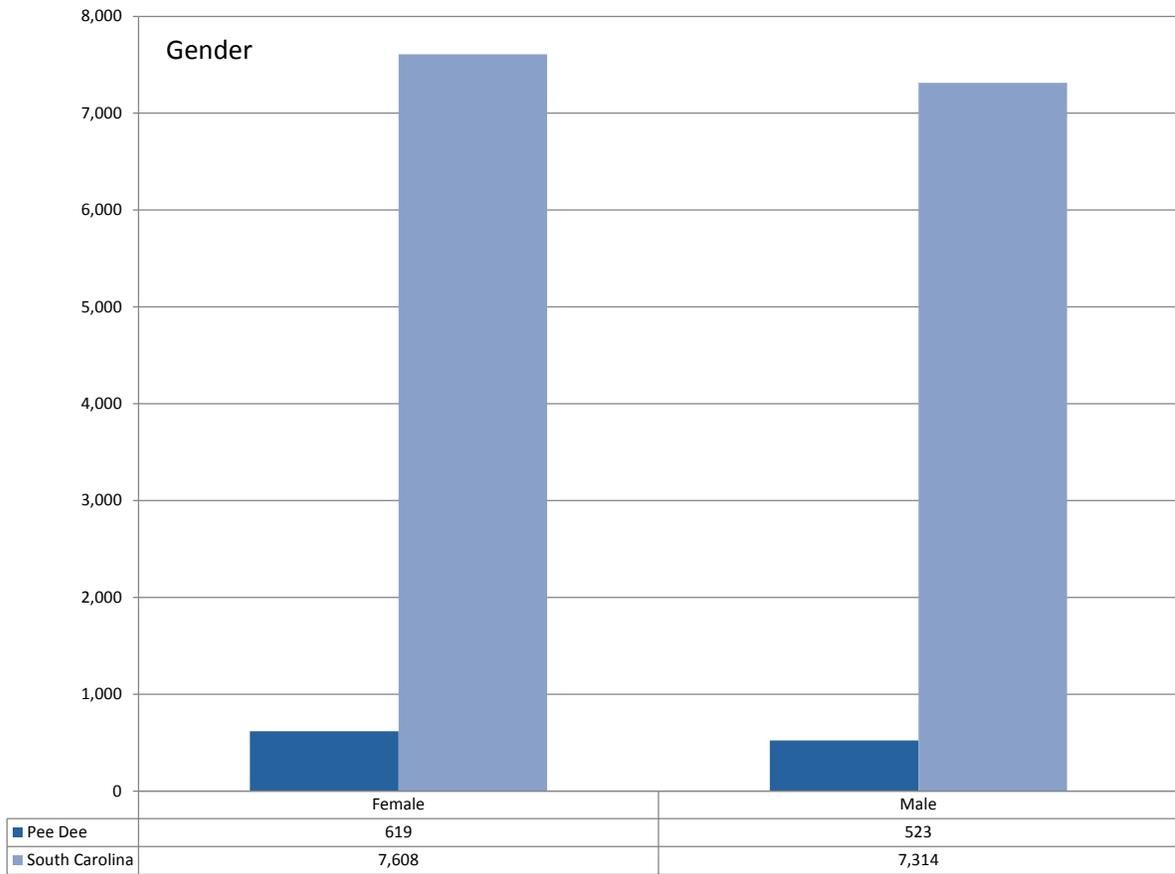
Occupation	Pee Dee	South Carolina
Manufacturing	170	2,267
Administrative and Support and Waste Management	149	2,373
Retail Trade	129	1,616
Health Care and Social Assistance	124	1,076
Accommodation and Food Services	96	1,321
Wholesale Trade	60	445
Construction	59	820
Transportation and Warehousing	53	414
Professional, Scientific, and Technical Services	29	698
Finance and Insurance	27	300
Other Services (except Public Administration)	27	292
Public Administration	15	206
Management of Companies and Enterprises	12	35
Agriculture, Forestry, Fishing and Hunting	11	98
Educational Services	11	222
Arts, Entertainment, and Recreation	9	94
Real Estate and Rental and Leasing	7	213
Information	6	122
Mining, Quarrying, and Oil and Gas Extraction	2	10

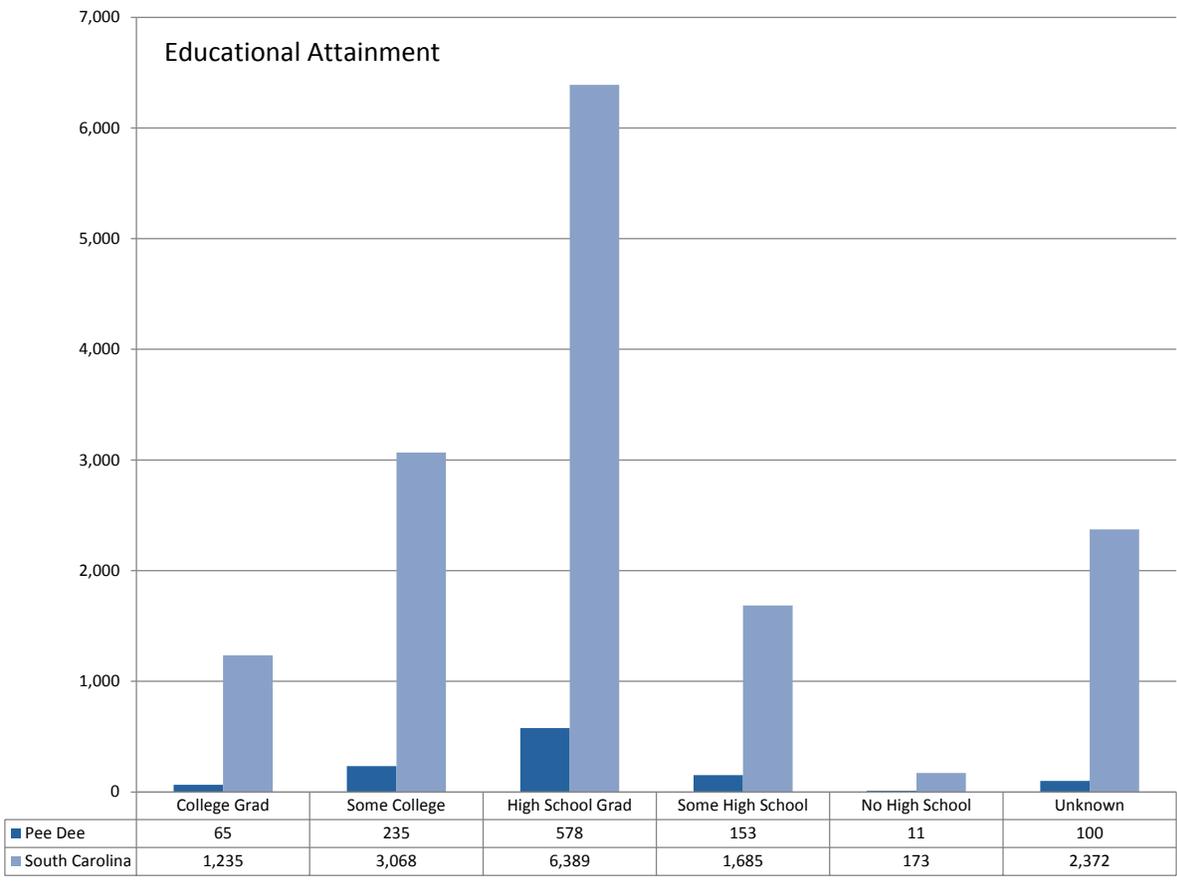
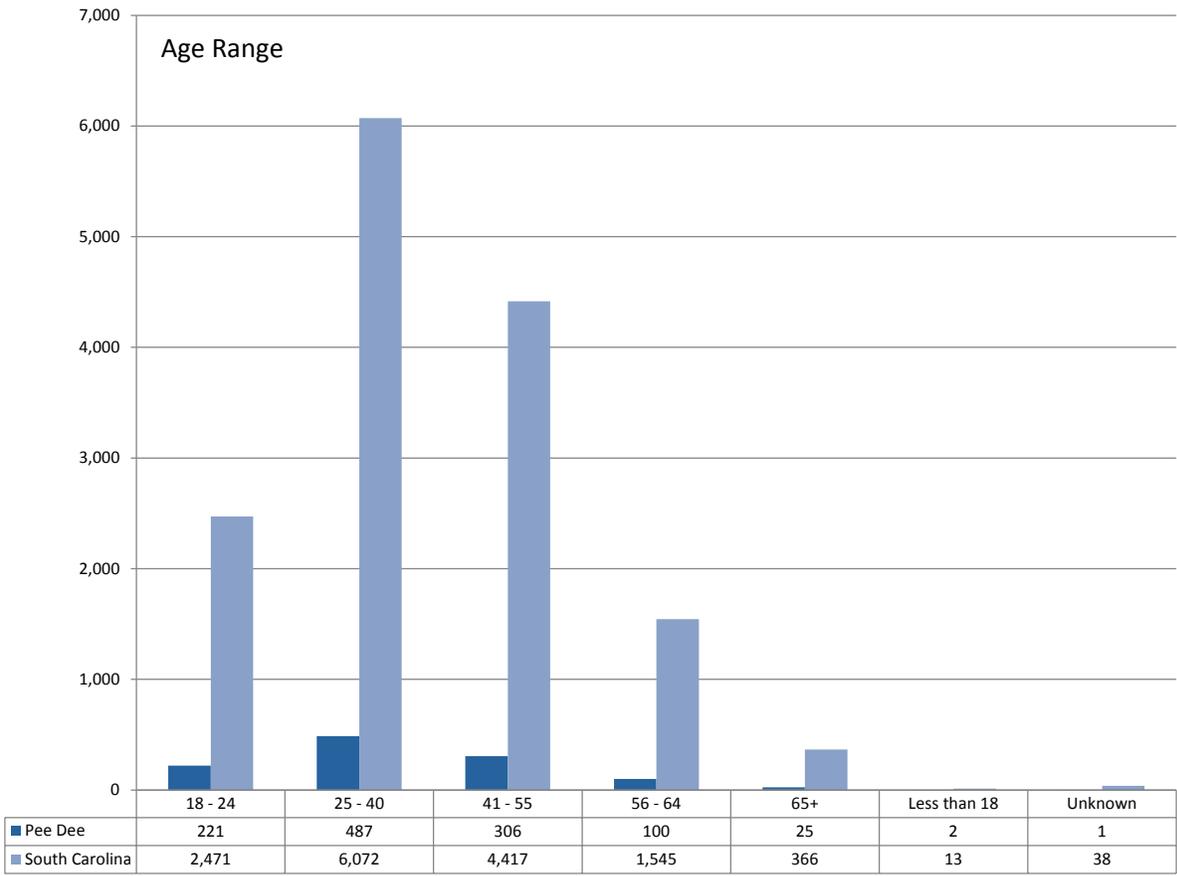
Source: SCDEW

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 Pee Dee LWIA was Healthcare Practitioners and Technical Occupations followed by Sales and Related Occupations.

ONLINE JOB ADVERTISEMENTS

Figure 23: Pee Dee HWOL - April 2013 by Major Group

Occupation	# of Job Ads
Healthcare Practitioners and Technical Occupations	697
Sales and Related Occupations	370
Transportation and Material Moving Occupations	293
Management Occupations	228
Miscellaneous	203
Healthcare Support Occupations	197
Office and Administrative Support Occupations	194
Food Preparation and Serving Related Occupations	170
Architecture and Engineering Occupations	159
Installation, Maintenance, and Repair Occupations	132
Business and Financial Operations Occupations	117
Computer and Mathematical Occupations	102
Construction and Extraction Occupations	90
Production Occupations	88
Protective Service Occupations	83
Education, Training, and Library Occupations	71
Arts, Design, Entertainment, Sports, and Media Occupations	61
Building and Grounds Cleaning and Maintenance Occupations	43
Community and Social Services Occupations	32
Personal Care and Service Occupations	30
Legal Occupations	9
Life, Physical, and Social Science Occupations	8
Military Specific Occupations	1
Farming, Fishing, and Forestry Occupations	1

Note: A job advertisement may include multiple openings.

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

INDUSTRY PROJECTIONS

The Health Care and Social Assistance industry is projected to have the largest increase in employment from 2008 to 2018, growing by 4,160 jobs or 416 jobs/year. This sector includes services such as ambulatory health care services, hospitals, nursing and residential care facilities, and so-

cial assistance services. The Educational Services category reports the next largest growth with a projected 89 openings/year followed by Administrative and Support and Waste Management with 71 jobs/year.

Figure 24: Industry Projections - 2008-2018

Industry	Estimate Employment (2008)	Projected Employment (2018)	Change	Percent Change	Annual Percent Change
Total Employment, All Jobs	134,254	140,226	5,972	4.45	0.44
Health Care and Social Assistance	18,891	23,051	4,160	22.02	2.01
Educational Services	10,946	11,839	893	8.16	0.79
Administrative and Support and Waste Management and Remediation	3,976	4,687	711	17.88	1.66
Accommodation and Food Services	9,472	10,114	642	6.78	0.66
Professional, Scientific, and Technical Services	2,482	3,054	572	23.05	2.10
Government	10,448	10,988	540	5.17	0.51
Wholesale Trade	4,597	5,083	486	10.57	1.01
Transportation and Warehousing	4,108	4,581	473	11.51	1.10
Management of Companies and Enterprises	875	1,299	424	48.46	4.03
Finance and Insurance	4,294	4,699	405	9.43	0.91
Retail Trade	15,758	16,094	336	2.13	0.21
Real Estate and Rental and Leasing	891	1,039	148	16.61	1.55
Arts, Entertainment, and Recreation	1,035	1,162	127	12.27	1.16
Other Services (Except Government)	4,911	4,943	32	0.65	0.07
Mining	201	210	9	4.48	0.44
Information	1,301	1,305	4	0.31	0.03
Utilities	862	834	-28	-3.25	-0.33
Construction	4,547	4,380	-167	-3.67	-0.37
Agriculture, Forestry, Fishing and Hunting	3,433	2,099	-1,334	-38.86	-4.80
Manufacturing	23,573	21,116	-2,457	-10.42	-1.09

Source: BLS, SCDEW, QCEW, WI

OCCUPATIONAL PROJECTIONS

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

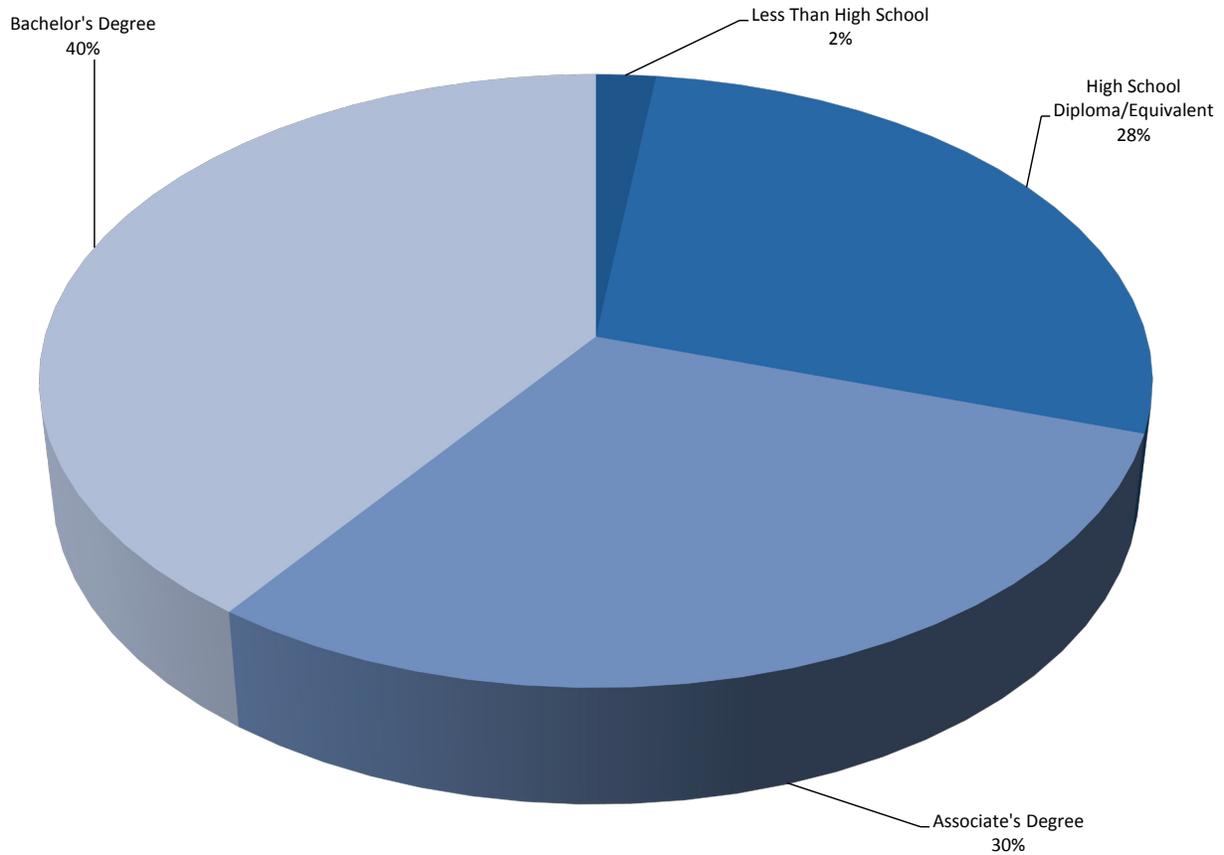
Figure 25: Growing Occupations - 2008-2018

Occupation	Estimated Employment (2008)	Projected Employment (2018)
Nursing Aides, Orderlies, and Attendants	2,364	2,914
Personal and Home Care Aides	505	852
Pharmacy Technicians	505	700
Pharmacists	360	445
Insurance Sales Agents	332	419
First-Line Super./Manag., Personal Service Workers	297	365
Surgical Technologists	288	350
Paralegals and Legal Assistants	197	244
Dental Assistants	177	215
Instructional Coordinators	165	201
Fitness Trainers and Aerobics Instructors	158	194
Compliance Officers, Except Agriculture, Construction	119	148
Respiratory Therapists	114	138
Personal Financial Advisors	79	116
Medical Equipment Repairers	21	33
Biological Technicians	27	33
Veterinarians	24	29
Mental Health Counselors	18	23
Recreational Therapists	13	16
Transportation Inspectors	10	15

Source: BLS, SCDEW, OES, WI

Of the top 50 projected growing occupations by percent change, 14 require a high school diploma or GED, one requires less than a high school diploma or GED, 20 require a bachelor's degree or higher, and 15 need an associate's degree or require some kind of postsecondary training. The one occupation requiring less than a high school diploma or GED does 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 Pee Dee - 2008-2018

Occupation
Agricultural Equipment Operators
Chief Executives
Computer Operators
Computer, Automated Teller & Office Mach. Repairers
Cutting, Punching, and Press Machine Setters
Electricians
Farmworkers & Laborers, Crop, Nursery & Greenhouse
File Clerks
Grinding, Lapping, Polishing, and Buffing Machine Operators
Helpers--Installation, Maint., & Repair Workers
Industrial Engineering Technicians
Inspectors, Testers, Sorters, Samplers & Weighers
Maintenance Workers, Machinery
Multiple Machine Tool Setters, Operators, and Tenders
Order Clerks
Pipelayers
Postal Service Mail Sorters, Processors
Pressers, Textile, Garment, and Related Materials
Roofers
Sewing Machine 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	6
Middle	24
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 the Pee Dee LWIA, the supply of workers, and the characteristics of workers who will be in demand has been reviewed. What can be gleaned from these findings? Are there gaps between supply and demand?

Supply Findings

The population is projected to grow very slowly to 2030, and with a smaller-than-the-state share of 20-29 year olds in their prime working age, this area looks to have a challenge in having a proper mix of workers. In addition, in-migration from other states/countries adds few residents at the top end of the educational spectrum. The LWIA has a lower percent of residents aged 25 and older with more than a high school diploma or GED than the state does as a whole.

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

Demand Findings

Employer demand was consistent between online advertisements (current) and 2018 projected occupations (long-term needs) in general. Both had the need for workers in Marketing, Sales, and Service; Health Science; and Business, Management, and Administration. Transportation, Distribution, and Logistics was a short-term need, while Hospitality and Tourism was a long-term need. All but one 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	1.2	3.5	0.1	3.4
Architecture and Construction	4.1	3.9	6.6	5.0
Arts, Audio/Video Technology and Communications	1.8	0.8	2.4	10.4
Business, Management and Administration	14.6	15.8	14.5	6.3
Education and Training	1.4	7.3	10.2	5.9
Finance	4.9	2.7	1.2	0.9
Government and Public Administration	0.2	0.2	1.4	6.8
Health Science	22.3	14.4	20.6	27.7
Hospitality and Tourism	3.8	9.2	0.0	2.3
Human Service	3.2	6.9	19.6	6.1
Information Technology	3.9	1.1	2.3	2.8
Law, Public Safety, Corrections and Security	1.2	3.0	4.6	5.4
Manufacturing	3.1	8.2	2.0	2.0
Marketing, Sales and Service	17.0	15.5	3.0	1.1
Science, Technology, Engineering and Mathematics	6.0	1.1	9.4	9.0
Transportation, Distribution, and Logistics	11.3	6.3	2.3	4.7

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

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

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

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

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

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

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

CONCLUSION

The Pee Dee LWIA area overall encompasses an economy dependent on health care, manufacturing, and retail trade. The population is slowly increasing, and the education level for the population is lower than the state as a whole at the high end with lower percentages of residents with more than a high school diploma or GED. The workforce (current and potential) does face challenges in having the proper mix of employer demand being met by trained applicants. The majority of employers are advertising for jobs in health care; business, management, and administration; or marketing and sales. However, some supply flows could be fine-tuned to be more in line with demand.

The data shows that:

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

Getting education in line with the demands of employers will help the Pee Dee LWIA meet the challenges it faces.