

South Carolina Economic Analysis Report

June 30

2017

An examination of the
state's economy and
workforce.



The 2017 South Carolina Economic Analysis Report 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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Executive Summary

South Carolina's Gross Domestic Product (GDP) was \$209.7 billion in 2016 or 26th in the nation. The growth over the year in real dollars was 2.1 percent. The growth of the GDP in real dollars from 2014 to 2016 was \$8.6 billion or 4.9 percent with Manufacturing, Professional and Business Services, and Health Care and Social Assistance showing notable gains. Most of the state's metropolitan areas have seen moderate growth in GDP over the past several years.

The state's personal income growth of 4.4 percent outpaced the nation's growth of 3.6 in 2016 and reached \$195.8 million dollars. South Carolina's per capita income in 2016 was \$39,465 or 80 percent of the U.S average.

The state's population continues to increase. Over the period 2011-2015, the percent of the population graduating high school and those obtaining at least a Bachelor's degree increased to 86.3 percent and 26.8 percent, respectively. The veterans' share of the population decreased over the period, while the disabled population increased. The population has become somewhat less mobile over that period in percentage terms.

South Carolina's labor market has improved dramatically over the past several years with the labor force and employment levels reaching all-time highs. The unemployment rate dropped considerably, falling to below 4.5 percent by the end of 2016.

Trade, Transportation, and Utilities; Leisure and Hospitality; and Education and Health Services led the state in private sector industry employment growth from 2014 to 2016. South Carolina had over 1.98 million wage and salary employees in 2016 with an average hourly wage of \$19.97. The state's industry employment is projected to grow by 8.99 percent over the period 2014 to 2024. The Local Workforce Development Area (LWDA) employment projections show an economy creating over 73,600 job openings per year.

Commuting patterns show an interconnected economy with significant travel of inbound and outbound commuters to and from the state.

Job skills and knowledge that are most in demand by employers are of a general nature, such as active listening, reading comprehension, and customer service. A labor supply-demand gap analysis generally shows an oversupply of graduates compared to job demand for positions requiring education beyond high school, though specific demand deficits exist.

Many of the state's jobless face challenges to employment that workforce officials help to overcome. Those populations include Hispanics, Native Americans, homeless, veterans, and others.

Introduction

South Carolina has made remarkable economic progress over the past three years. Most economic indicators point to strongly increasing activity. Dr. Joey Von Nessen, University of South Carolina economic researcher, said in the annual economic outlook conference in late 2016, “For the last several years, our rate of economic growth has been accelerating, but in 2016 it leveled off and is now growing at a constant rate. In addition, the labor market has strengthened considerably. Our unemployment rate has dropped to 4.7 percent. And although this is good news for workers, it also means that employers are now struggling to find qualified employees to fill new positions. Going forward, if we want to achieve a higher rate of economic growth, this skills gap will have to be addressed.”¹

The S. C. Department of Commerce reported that in 2016 the state awarded new business grants that projected capital investments worth more than \$3.4 billion and would add nearly 9,000 new jobs to the state.²

Certainly, these investments will add momentum to the state’s economic growth as highlighted in this report. The purpose of the South Carolina Economic Analysis Report is to present an overview of key metrics used in examining South Carolina’s economy and workforce. The Business Intelligence Department of the Department of Employment and Workforce compiles and publishes numerous data series on the state of the workforce. These measures and other pertinent data sources were utilized in this examination.

This report highlights a number of measures that illuminate several aspects of the state’s economy. The following section presents an overview of GDP for the state and metropolitan areas. Personal income of the state continues in the next section followed by population data and demographic characteristics. A detailed discussion of the state’s labor force follows.

South Carolina’s industry employment and leading industries highlight a subsequent section of the report along with a portrayal of current occupational employment. Employment projections for industries and occupations statewide and by LWDA follow. A presentation and explanation of the state’s commuting patterns succeeds the projections narrative. Content concerning job characteristics as well as a labor supply-demand gap analysis follows. Finally, a discussion of the jobless population that faces significant challenges to employment completes the document.

¹ Dr. Joey Von Nessen, University of South Carolina 2017 Economic Outlook Conference, December 2016; http://www.sc.edu/uofsc/posts/2016/12/moore_school_economic_forecast_for_2017.php#.WWi6tYtEb ; accessed on July 14, 2017.

² S.C. Department of Commerce, 2016 Annual Report of Fund Activity; <http://www.scstatehouse.gov/reports/DeptofCommerce/CCED%20Annual%20Report%202017%20Final.pdf> ; accessed on July 14, 2017.

Gross Domestic Product

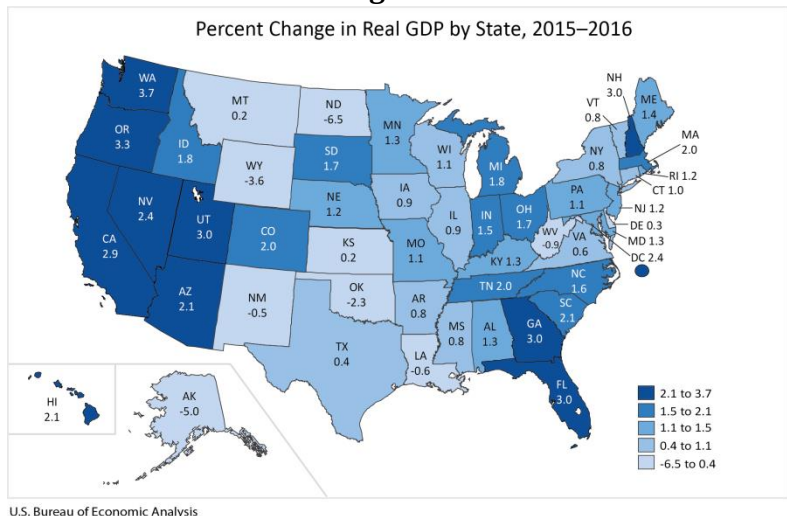
The Gross Domestic Product statistic is a measure of the overall health of a state's economy. It is an inflation-adjusted measure of a state's production based on a weighted average of national prices for those products produced within each state. In 2016, South Carolina had a growth of 2.1 percent in real dollars from the previous year, while the nation grew at only 1.5 percent. **Figure 1** highlights the percentage growth of the nation's GDP for the year 2015-2016. South Carolina grew faster than

North Carolina, Tennessee and Alabama in the southeastern region and faster than New York, Pennsylvania, Ohio and Texas, nationally. In current dollars, the GDP for South Carolina was \$209.7 billion in 2016. This figure ranks 26th in the nation.

GDP Over the Past Three Years

South Carolina has sustained healthy growth in the past three years, expanding from \$175.2 billion dollars in 2014 to \$183.9 billion dollars in 2016 in real, inflation-adjusted terms as shown in **Figure 2**. Growth in 2015 was especially strong with a gain of nearly \$5 billion dollars or 2.8 percent. The economy slowed down somewhat in 2016, sustaining a 2.1 percent growth rate from 2015.

Figure 1



GDP by Industry

For a more detailed view of the state's economy, **Figure 3** reveals South Carolina's GDP by industry for 2014-2016. Overall, the economy grew over \$8.6 billion dollars in real terms over the 3-year period, or 4.9 percent. Manufacturing grew by 3.8 percent to \$30.8 billion dollars from 2014 to 2015 but fell by -0.4 percent in 2016. Finance, Insurance, and Real Estate grew to \$30.7 billion dollars by 2016. These two major sectors of the economy each represented 16.7 percent of South Carolina's total GDP by 2016. Other industries showing notable GDP growth levels include Professional and Business Services; Educational, Health Care and Social Services; and Arts, Entertainment, Recreation, Accommodation, and Food Services. The Private Sector represents 85 percent of the economy, while Government is 15 percent.

Figure 3

South Carolina Real Gross Domestic Product by Industry

Industry	2014	2015	2016	Percent Growth from Previous Year		2016 Percent of Total
				2015	2016	
All industry total	\$175,248	\$180,111	\$183,873	2.8%	2.1%	100.0%
Private industries	\$147,764	\$152,251	\$156,045	3.0%	2.5%	84.9%
Agriculture, forestry, fishing, and hunting	\$844	\$798	\$843	-5.5%	5.6%	0.5%
Mining	\$253	\$318	\$317	25.7%	-0.3%	0.2%
Utilities	\$4,349	\$4,220	\$4,412	-3.0%	4.5%	2.4%
Construction	\$7,826	\$8,244	\$9,019	5.3%	9.4%	4.9%
Manufacturing	\$29,713	\$30,845	\$30,721	3.8%	-0.4%	16.7%
Durable goods manufacturing	\$18,004	\$18,138	\$18,391	0.7%	1.4%	10.0%
Nondurable goods manufacturing	\$11,841	\$12,800	\$12,450	8.1%	-2.7%	6.8%
Wholesale trade	\$10,092	\$10,509	\$10,690	4.1%	1.7%	5.8%
Retail trade	\$12,868	\$13,075	\$13,497	1.6%	3.2%	7.3%
Transportation and warehousing	\$4,022	\$4,102	\$4,202	2.0%	2.4%	2.3%
Information	\$4,733	\$5,144	\$5,415	8.7%	5.3%	2.9%
Finance, insurance, real estate, rental, and leasing	\$29,624	\$30,070	\$30,720	1.5%	2.2%	16.7%
Finance and insurance	\$7,332	\$7,159	\$7,392	-2.4%	3.3%	4.0%
Real estate and rental and leasing	\$22,356	\$23,009	\$23,417	2.9%	1.8%	12.7%
Professional and business services	\$18,454	\$19,004	\$19,752	3.0%	3.9%	10.7%
Professional, scientific, and technical services	\$8,809	\$9,276	\$9,873	5.3%	6.4%	5.4%
Management of companies and enterprises	\$1,766	\$1,726	\$1,880	-2.3%	8.9%	1.0%
Administrative and waste management services	\$7,883	\$7,996	\$7,994	1.4%	0.0%	4.3%
Educational services, health care, and social assistance	\$12,824	\$13,407	\$13,765	4.5%	2.7%	7.5%
Educational services	\$1,181	\$1,169	\$1,176	-1.0%	0.6%	0.6%
Health care and social assistance	\$11,646	\$12,246	\$12,601	5.2%	2.9%	6.9%
Arts, entertainment, recreation, accommodation, and food serv	\$8,070	\$8,375	\$8,518	3.8%	1.7%	4.6%
Arts, entertainment, and recreation	\$1,185	\$1,235	\$1,255	4.2%	1.6%	0.7%
Accommodation and food services	\$6,884	\$7,139	\$7,262	3.7%	1.7%	3.9%
Other services, except government	\$4,142	\$4,220	\$4,270	1.9%	1.2%	2.3%
Government	\$27,536	\$27,922	\$27,904	1.4%	-0.1%	15.2%

Source: U.S. Bureau of Economic Analysis

Note: Dollar values in millions of chained 2009 dollars.

GDP by Metropolitan Statistical Area

Figure 4 shows the GDP for the state's Metropolitan Statistical Areas (MSA) over the period 2010-2015. Growth for the MSAs has been mixed in the recovery period since the Great Recession with only four subareas of the state having positive growth for each of the years over the period. The Charlotte MSA, which includes Chester, Lancaster and York counties, and the Charleston MSA grew the fastest from 2014 to 2015 at 4.3 percent and 4.1 percent, respectively. In 2015, the Greenville and Columbia MSAs had GDPs of \$34 billion dollars, while Charleston MSA's GDP was \$32.5 billion dollars.

Figure 4

Real Gross Domestic Product (GDP) by Metropolitan Area, 2010-2015

Area	Millions of chained (2009) dollars						Percent Change				
	2010	2011	2012	2013	2014	2015*	2011	2012	2013	2014	2015*
U.S. metropolitan areas	13,254,854	13,438,564	13,721,925	13,887,768	14,203,294	14,563,088	1.4	2.1	1.2	2.3	2.5
Augusta-Richmond County, GA-SC	19,333	19,487	19,547	19,475	19,543	19,755	0.8	0.3	-0.4	0.4	1.1
Charleston-North Charleston, SC	28,351	29,514	30,197	30,420	31,284	32,541	4.1	2.3	0.7	2.8	4.0
Charlotte-Concord-Gastonia, NC-SC	113,489	121,075	121,250	124,998	129,359	134,930	6.7	0.1	3.1	3.5	4.3
Columbia, SC	31,613	31,838	32,055	32,478	33,478	34,186	0.7	0.7	1.3	3.1	2.1
Florence, SC	6,907	6,793	6,892	7,169	7,216	7,271	-1.7	1.5	4.0	0.7	0.8
Greenville-Anderson-Mauldin, SC	31,140	32,172	31,940	32,407	33,395	34,306	3.3	-0.7	1.5	3.0	2.7
Hilton Head Island-Bluffton-Beaufort, SC	7,287	7,058	6,925	6,934	7,100	7,111	-3.1	-1.9	0.1	2.4	0.2
Myrtle Beach-Conway-North Myrtle Beach, SC-NC	13,581	13,872	13,898	14,003	14,199	14,266	2.1	0.2	0.8	1.4	0.5
Spartanburg, SC	11,402	11,878	11,808	12,082	12,498	12,604	4.2	-0.6	2.3	3.4	0.8
Sumter, SC	2,984	3,066	3,305	3,281	3,301	3,262	2.8	7.8	-0.7	0.6	-1.2
South Carolina	162,840	166,389	166,858	170,217	175,248	180,111	2.2	0.3	2.0	3.0	2.8

* Advance statistics for U.S. and metros

Source: U.S. Bureau of Economic Analysis

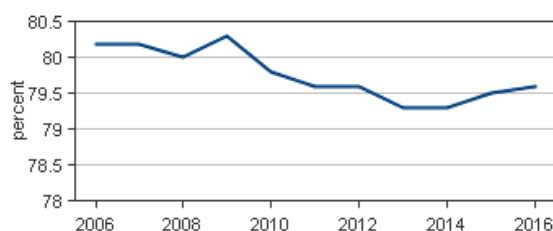
State Personal Income

Personal income is defined as the income received for persons in a given area from all sources. South Carolina's total personal income in 2016 in current dollars was \$195.8 million dollars, an increase of 4.4 percent from a year earlier, outpacing the U.S. growth rate of 3.6 percent. This percent increase for the state was the 10th highest in the nation.

Per capita personal income is calculated as the total personal income of the residents of an area divided by the population of the area. It is often used as an indicator of consumers' purchasing power and of the economic well-being of the residents of an area. South Carolina's per capita personal income in 2016 was \$39,465. The per capita income is 80 percent of the national average of \$49,571. The state had trended down before 2014 but has improved its position since then as shown in **Figure 5**.

Figure 5

South Carolina Per Capita Income as a Percent of the U.S.



SOURCE: U.S. Bureau of Economic Analysis

Population Characteristics of South Carolina

Certain population characteristics are important in terms of economic and workforce issues. Among those characteristics are educational attainment, veterans and disability status, and geographic mobility. A more educated workforce attracts industries into the state. Veterans offer work skills that are attractive to potential employers. The disabled workforce may require special conditions for employment. A mobile population can bring in valuable skills to the workforce.

Figure 6 displays such information for the state over the 5-year period 2011-2015. Over time, lower percentages of the population, aged 25 and older, have an education of less than a high school diploma, and higher percentages obtained more than a high school education. In 2015, more than 86 percent of the population aged 25 and older had a high school education, and nearly 27 percent held a bachelor's degree or higher. The increasingly educated population bodes well for the state economically.

Figure 6

South Carolina Population Figures, 2011-2015

Subject	South Carolina				
	2015 Estimate	2014 Estimate	2013 Estimate	2012 Estimate	2011 Estimate
EDUCATIONAL ATTAINMENT					
Population 25 years and over	3,319,832	3,260,929	3,198,816	3,151,616	3,110,532
Less than 9th grade	4.4%	4.5%	5.0%	5.2%	5.6%
9th to 12th grade, no diploma	9.2%	9.3%	9.3%	10.0%	10.3%
High school graduate (includes equivalency)	29.4%	30.3%	29.4%	29.8%	30.7%
Some college, no degree	20.7%	20.7%	21.3%	21.1%	20.8%
Associate's degree	9.4%	8.8%	8.9%	8.9%	8.6%
Bachelor's degree	17.3%	16.7%	16.6%	16.0%	15.6%
Graduate or professional degree	9.5%	9.6%	9.5%	9.1%	8.4%
Percent high school graduate or higher	86.3%	86.1%	85.6%	84.9%	84.2%
Percent bachelor's degree or higher	26.8%	26.3%	26.1%	25.1%	24.1%
VETERAN STATUS					
Civilian population 18 years and over	3,778,952	3,719,245	3,669,343	3,609,405	3,563,610
Civilian veterans	9.8%	9.9%	10.0%	10.9%	11.2%
DISABILITY STATUS OF THE CIVILIAN NONINSTITUTIONALIZED POPULATION					
Total Civilian Noninstitutionalized Population	4,801,301	4,733,742	4,678,122	4,623,171	4,579,231
With a disability	14.8%	14.8%	14.5%	14.0%	13.8%
Under 18 years	1,086,607	1,080,779	1,076,621	1,078,022	1,079,476
With a disability	4.8%	4.5%	4.6%	4.0%	3.8%
18 to 64 years	2,938,107	2,908,636	2,893,842	2,868,533	2,862,576
With a disability	12.6%	12.9%	12.7%	12.4%	12.3%
65 years and over	776,587	744,327	707,659	676,616	637,179
With a disability	37.4%	37.3%	37.2%	37.1%	37.4%
RESIDENCE 1 YEAR AGO					
Population 1 year and over	4,839,984	4,780,659	4,720,602	4,668,886	4,624,180
Same house	84.8%	84.6%	84.7%	84.2%	84.3%
Different house in the U.S.	14.7%	15.0%	14.9%	15.4%	15.2%
Same county	8.1%	8.2%	8.3%	8.6%	8.8%
Different county	6.7%	6.8%	6.6%	6.8%	6.4%
Same state	3.1%	3.2%	3.1%	3.5%	3.0%
Different state	3.5%	3.6%	3.5%	3.4%	3.4%
Abroad	0.4%	0.4%	0.4%	0.4%	0.4%

Source: U.S. Census Bureau, American Community Survey, 2015 1-Year Estimate, Table CP02 Comparative Social Characteristics in the United States

The veterans' population share of the civilian population, aged 18 or higher, has decreased by 1.4 percent over the five-year period in the state. The percentage of South Carolinians with a disability among the civilian noninstitutional population has increased over the period by a full percentage point; however, the percentage of those over the age of 65 with a disability has remained steady at 37.4 percent. The table demonstrates that a lower portion of the population moved in 2015 than in 2011, falling from 15.2 percent to 14.7 percent.

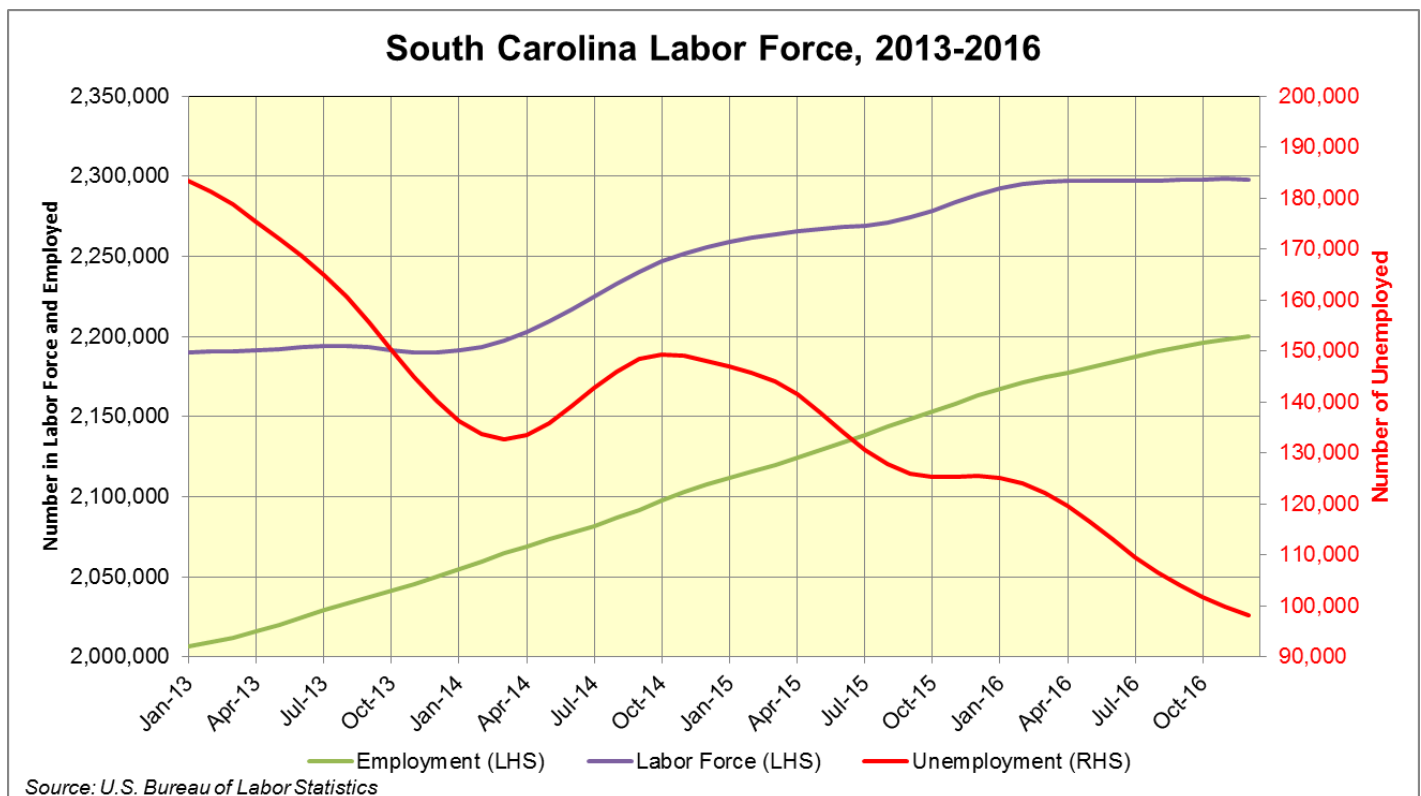
Over the recent past, South Carolina's population, aged 25 and above, has been on the rise. From 2011 to 2015, the state increased by over 209,000 people or 6.7 percent.

South Carolina Labor Force

An important component of the economy in South Carolina is the labor force. By definition, the labor force measures people at their residence location and equals the sum of the employed and the unemployed. **Figure 7** illustrates the movement of the labor force (left hand scale), employed (left hand scale), and unemployed (right hand scale) from 2013 to 2016.

Over the period 2013-2016, the labor market has improved drastically. The labor force has grown by 108,000 people over that time, reaching almost 2.3 million in December 2016.

Figure 7



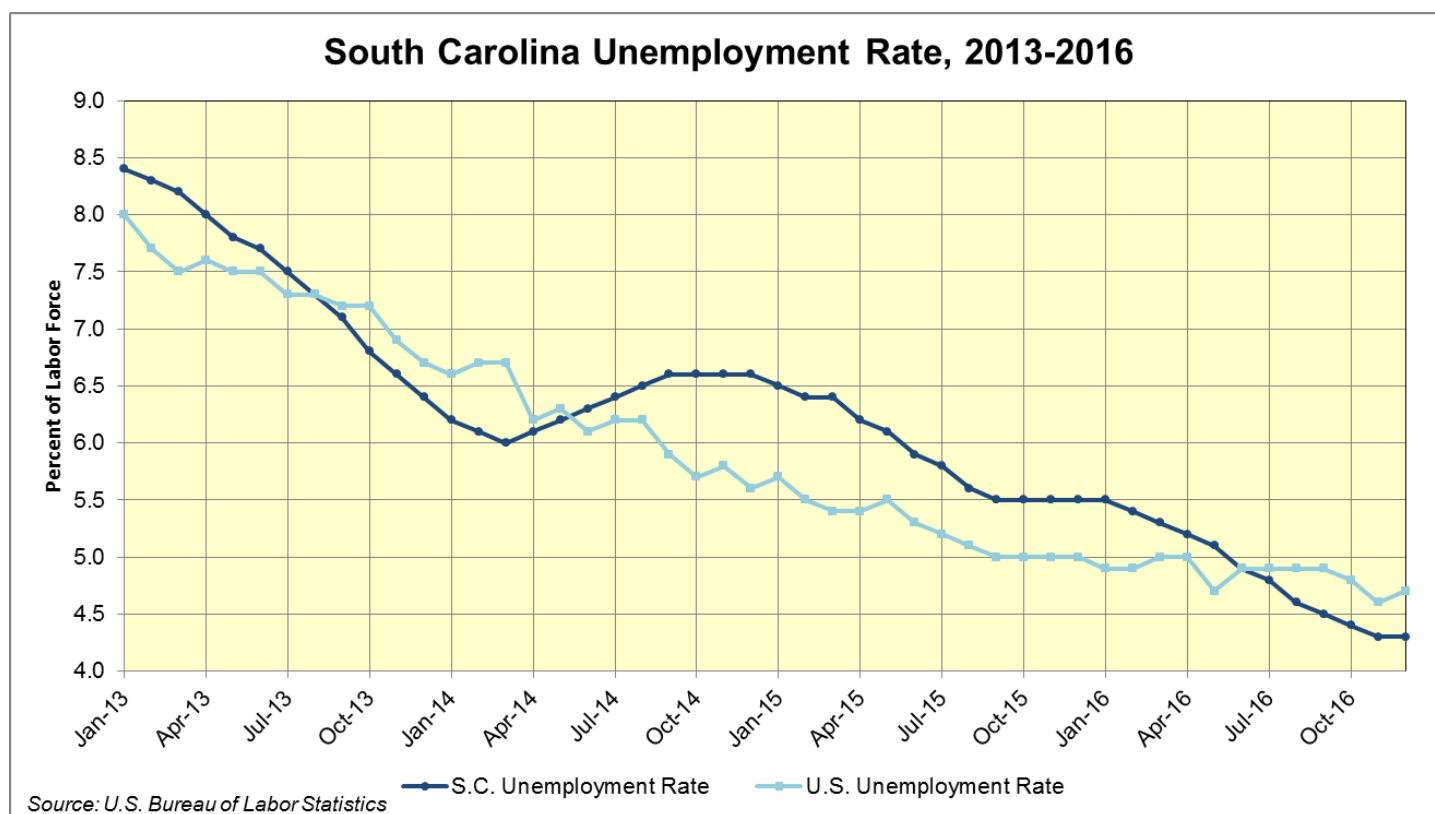
Employment has risen steadily over the period, climbing by over 193,000 people to 2,199,862 in December 2016, a 9.6 percent increase from January 2013.

Unemployment has fallen by 85,000 people over the three-year period from over 183,000 in January 2013 to 98,225 in December 2016, a decline of 46 percent.

Unemployment Rate

The unemployment rate is the percent of the labor force that is unemployed. In South Carolina, the unemployment rate has fallen dramatically over the period. In January 2013, the rate stood at 8.4 percent, and by the end of 2016, the figure had dropped to 4.3 percent. Likewise, the U.S. unemployment rate fell from 8.0 percent to 4.7 percent over the same period. As a comparison, in January 2010 at the height of the Great Recession, South Carolina's unemployment rate reached 11.7 percent. **Figure 8** highlights the movement of the unemployment rate over the recent three-year period.

Figure 8



South Carolina Industry Employment

South Carolina's economy has staged a remarkable comeback from the Great Recession, especially over the past three years. In terms of nonfarm industry employment, the state has grown by 102,600 jobs, or 5.3 percent, between 2014 and 2016 as shown in the table in **Figure 9**. The sector leading the growth is Trade, Transportation, and Utilities, gaining almost 21,100 new jobs; followed by Leisure and Hospitality, adding 17,700 positions; and Education and Health Services, increasing by 14,400 jobs. Government, the largest of all sectors, gained 8,000 jobs or 2.2 percent.

The Goods-Producing sector overall grew by 20,800 jobs or 6.6 percent, while the Service-Providing sector grew by 82,000 jobs or 5.0 percent from 2014 to 2016. Year 2015 was a stronger growth time for eight of the 11 major industry sectors than was 2016. Only Natural Resources and Mining, Construction, and Financial Activities grew more in 2016 than 2015.

Figure 9
South Carolina Nonfarm Industry Employment (in Thousands)

Industry Code	Title	2014	2015	2016	2014-2015	2015-2016
00000000	Total Nonfarm	1,951.3	2,006.7	2,053.9	55.4	47.2
05000000	Total Private	1,595.3	1,646.5	1,690.0	51.2	43.5
06000000	Goods-Producing	316.6	326.9	337.4	10.3	10.5
07000000	Service-Providing	1,634.6	1,679.8	1,716.6	45.2	36.8
10000000	Natural Resources and Mining	3.9	4.0	4.2	0.1	0.2
20000000	Construction	82.6	87.0	94.8	4.4	7.8
30000000	Manufacturing	230.2	235.9	238.4	5.7	2.5
40000000	Trade, Transportation, and Utilities	373.4	385.1	394.5	11.7	9.4
50000000	Information	26.4	26.9	27.1	0.5	0.2
55000000	Financial Activities	96.2	97.4	100.0	1.2	2.6
60000000	Professional and Business Services	254.0	262.9	268.0	8.9	5.1
65000000	Education and Health Services	227.5	235.0	241.9	7.5	6.9
70000000	Leisure and Hospitality	229.2	238.7	246.9	9.5	8.2
80000000	Other Services	72.0	73.7	74.4	1.7	0.7
90000000	Government	355.9	360.2	363.9	4.3	3.7

Source: U.S. Bureau of Labor Statistics, Current Employment Statistics (CES) Program

South Carolina Leading Industries

Another measure of the strength of an economy is industry specialization or answering the question “How does an industry's portion of the employment mix in the state compare to its portion in the nation?” This question identifies the definition of the location quotient (LQ) statistic. An LQ above 1.0 indicates that the industry has a higher concentration of employment in the state than it does in the nation and thus holds a competitive advantage over its neighbors. In South Carolina, five industry sectors led the state in 2016 in terms of employment specialization with LQs greater than 1.0 as measured by the Quarterly Census of Employment and Wages (QCEW)—Utilities, Manufacturing, Retail Trade, Administrative and Waste Services, and Accommodation and Food Services.

These industries highlight the state's strong economic base of tourism and manufacturing.

South Carolina Occupational Employment

South Carolina had 1.980 million wage and salary occupational employees in 2016 with an average hourly wage of \$19.97. **Figure 10** summarizes more than 800 detailed occupations into major occupational groups and presents employment and average wage information.

Figure 10

South Carolina Occupational Employment, May 2016

Occupational Code	Occupational Title	Employment	Average Hourly Wage
00-0000	All Occupations	1,979,820	\$19.97
11-0000	Management Occupations	87,700	\$46.68
13-0000	Business and Financial Operations Occupations	74,980	\$29.26
15-0000	Computer and Mathematical Occupations	37,660	\$34.49
17-0000	Architecture and Engineering Occupations	37,800	\$36.25
19-0000	Life, Physical, and Social Science Occupations	9,110	\$30.65
21-0000	Community and Social Service Occupations	24,850	\$19.66
23-0000	Legal Occupations	13,080	\$36.17
25-0000	Education, Training, and Library Occupations	114,000	\$22.66
27-0000	Arts, Design, Entertainment, Sports, and Media Occupations	18,100	\$21.74
29-0000	Healthcare Practitioners and Technical Occupations	119,740	\$35.31
31-0000	Healthcare Support Occupations	55,380	\$13.11
33-0000	Protective Service Occupations	46,730	\$17.83
35-0000	Food Preparation and Serving Related Occupations	195,840	\$10.06
37-0000	Building and Grounds Cleaning and Maintenance Occupations	69,340	\$11.32
39-0000	Personal Care and Service Occupations	51,820	\$11.07
41-0000	Sales and Related Occupations	219,130	\$15.78
43-0000	Office and Administrative Support Occupations	297,900	\$16.12
45-0000	Farming, Fishing, and Forestry Occupations	4,000	\$16.95
47-0000	Construction and Extraction Occupations	73,560	\$18.73
49-0000	Installation, Maintenance, and Repair Occupations	90,490	\$20.44
51-0000	Production Occupations	195,120	\$17.82
53-0000	Transportation and Material Moving Occupations	143,480	\$15.39

Source: S.C. Department of Employment and Workforce (SCDEW), Occupational Employment Survey (OES)

The Office and Administrative Support category had the highest occupational employment with 297,900 employees, followed by Sales and Related with 219,100, and Food Preparation and Serving occupations with 195,800 employees. The highest average hourly wages were found in Management occupations at \$46.68 per hour, Architecture and Engineering occupations at \$36.25 per hour, and Legal occupations at \$36.17 per hour. Food Preparation and Serving Related occupations had the lowest average wage at \$10.06 per hour.

Retail Salespersons, Cashiers, and Combined Food Preparation and Serving Workers are the top detailed occupations in the state in terms of the number of employees. **Figure 11** presents the top 20 occupations in the state along with their level of employment and average hourly wage.

Figure 11

South Carolina Top Occupations, May 2016

Occupational Code	Occupational Title	Employment	Average Hourly Wage
41-2031	Retail Salespersons	69,430	\$11.99
41-2011	Cashiers	64,740	\$9.16
35-3021	Combined Food Preparation and Serving Workers	52,450	\$8.75
53-7062	Laborers and Freight, Stock, and Material Movers, Hand	50,090	\$13.10
43-4051	Customer Service Representatives	48,070	\$14.91
51-2092	Team Assemblers	44,460	\$15.87
29-1141	Registered Nurses	41,800	\$30.51
43-6014	Secretaries and Administrative Assistants	38,070	\$15.52
35-3031	Waiters and Waitresses	36,570	\$9.68
11-1021	General and Operations Managers	31,780	\$46.40
37-2011	Janitors and Cleaners, Except Maids and Housekeeping Cleaners	30,990	\$10.60
43-9061	Office Clerks, General	30,280	\$13.38
43-5081	Stock Clerks and Order Fillers	27,320	\$11.65
53-3032	Heavy and Tractor-Trailer Truck Drivers	26,520	\$19.76
49-9071	Maintenance and Repair Workers, General	25,690	\$17.38
43-1011	First-Line Supervisors of Office and Administrative Support Workers	25,280	\$24.45
41-1011	First-Line Supervisors of Retail Sales Workers	22,830	\$19.12
35-2014	Cooks, Restaurant	21,750	\$10.47
25-2021	Elementary School Teachers, Except Special Education*	21,450	\$23.31
43-3031	Bookkeeping, Accounting, and Auditing Clerks	21,080	\$16.87

Source: S.C. Department of Employment and Workforce (SCDEW), Occupational Employment Survey (OES)

* Hourly Wage Rate calculated by dividing annual wage by 2,080 hours.

Statewide and Local Workforce Development Area Industry and Occupational Employment Projections

Statewide Industry Employment Projections

Figure 12 presents the latest available statewide industry employment projections over the 10-year period 2014-2024. Overall, all industries are projected to grow by 8.99 percent or by 175,200 jobs. Health Care and Social Assistance; Administrative and Support and Waste Management; Educational Services; and Accommodation and Food Services are each expected to increase employment by over 20,000 jobs. Government and Agriculture, Forestry, Fishing and Hunting are projected to decline slightly.

Over the period, Health Care and Social Assistance is projected to take over the top spot in industry employment from Retail Trade, which would be the second largest in 2024. Manufacturing and Accommodation and Food Services would be in third and fourth place, respectively.

Figure 12

South Carolina Industry Employment Projections, 2014-2024

Industry Code	Industry	Estimated 2014 Employment	Projected 2024 Employment	Numeric Change	Percent Change
000000	Total All Industries	1,947,383	2,122,537	175,154	8.99
110000	Agriculture, Forestry, Fishing and Hunting	38,615	32,318	-6,297	-16.31
210000	Mining	1,161	1,250	89	7.67
220000	Utilities	12,351	12,376	25	0.20
230000	Construction	82,577	94,065	11,488	13.91
310000	Manufacturing	230,122	238,317	8,195	3.56
420000	Wholesale Trade	68,140	71,629	3,489	5.12
440000	Retail Trade	236,874	248,522	11,648	4.92
480000	Transportation and Warehousing	56,395	62,738	6,343	11.25
510000	Information	26,449	26,996	547	2.07
520000	Finance and Insurance	66,662	69,833	3,171	4.76
530000	Real Estate and Rental and Leasing	27,239	29,097	1,858	6.82
540000	Professional, Scientific, and Technical Services	84,939	95,573	10,634	12.52
550000	Management of Companies and Enterprises	17,015	17,770	755	4.44
560000	Administrative and Support and Waste Management	152,333	178,959	26,626	17.48
610000	Educational Services	165,669	190,512	24,843	15.00
620000	Health Care and Social Assistance	228,836	275,258	46,422	20.29
710000	Arts, Entertainment, and Recreation	27,768	29,839	2,071	7.46
720000	Accommodation and Food Services	201,015	221,156	20,141	10.02
810000	Other Services (except Government)	72,000	75,431	3,431	4.77
900000	Government	151,223	150,898	-325	-0.21

Source: S.C. Dept. of Employment and Workforce, Industry Employment Projections Program

Local Workforce Development Area Industry Employment Projections

LWDA industry employment growth over the period 2014-2024 is projected to be uneven across the state as can be observed in **Figure 13**. Trident, Midlands and Greenville are projected to grow the most with numeric increases at more than 30,000 jobs each. Upstate and Waccamaw are projected to gain more than 15,000 jobs each.

Figure 13

Industry Employment Projections by Local Workforce Development Area

Area	Estimated 2014 Employment	Projected 2024 Employment	Numeric Change	Percent Change
Catawba	112,770	126,036	13,266	11.76
Greenville	250,896	284,411	33,515	13.36
Lowcountry	88,159	99,541	11,382	12.91
Lower Savannah	107,125	118,551	11,426	10.67
Midlands	334,407	373,364	38,957	11.65
Pee Dee	118,753	132,926	14,173	11.93
Santee-Lynches	66,628	73,826	7,198	10.80
Trident	308,084	347,692	39,608	12.86
Upper Savannah	84,097	92,809	8,712	10.36
Upstate	152,399	170,877	18,478	12.12
Waccamaw	150,894	168,435	17,541	11.62
WorkLink	122,067	134,070	12,003	9.83

Source: S.C. Dept. of Employment and Workforce, Industry Employment Projections Program

Midlands, Trident and Greenville LWDAs, encompassing the state's largest urban areas, are expected to continue to have the highest employment with well over 250,000 jobs each.

Statewide Occupational Employment Projections

The statewide occupational projections include self-employed workers in addition to the industry employment estimates for the period 2014-2024. **Figure 14** highlights the projections by major occupation group. Office and Administrative Support occupations are projected to have the highest number of employees in 2024 with 319,000, followed by Sales and Related occupations with 240,000, and Food Preparation and Serving Related occupations with 206,000. Production occupations are expected to employ 202,000 in 2024.

Figure 14

South Carolina Occupational Employment Projections, 2014- 2024

Occupation Code	Occupation Title	Estimated 2014 Employment	Projected 2024 Employment	Numeric Change	Percent Change
11-0000	Management Occupations	114,602	122,807	8,205	7.16
13-0000	Business and Financial Operations Occupations	78,262	85,457	7,195	9.19
15-0000	Computer and Mathematical Occupations	36,143	41,654	5,511	15.25
17-0000	Architecture and Engineering Occupations	37,642	40,379	2,737	7.27
19-0000	Life, Physical, and Social Science Occupations	10,661	11,190	529	4.96
21-0000	Community and Social Service Occupations	24,552	28,021	3,469	14.13
23-0000	Legal Occupations	14,953	15,871	918	6.14
25-0000	Education, Training, and Library Occupations	111,245	130,006	18,761	16.86
27-0000	Arts, Design, Entertainment, Sports, and Media Occupations	23,892	25,286	1,394	5.83
29-0000	Healthcare Practitioners and Technical Occupations	119,162	135,718	16,556	13.89
31-0000	Healthcare Support Occupations	54,945	66,836	11,891	21.64
33-0000	Protective Service Occupations	49,760	52,775	3,015	6.06
35-0000	Food Preparation and Serving Related Occupations	187,247	206,341	19,094	10.20
37-0000	Building and Grounds Cleaning and Maintenance Occupations	81,654	90,315	8,661	10.61
39-0000	Personal Care and Service Occupations	62,294	72,577	10,283	16.51
41-0000	Sales and Related Occupations	226,610	240,270	13,660	6.03
43-0000	Office and Administrative Support Occupations	305,719	319,265	13,546	4.43
45-0000	Farming, Fishing, and Forestry Occupations	25,295	20,901	-4,394	-17.37
47-0000	Construction and Extraction Occupations	82,959	92,621	9,662	11.65
49-0000	Installation, Maintenance, and Repair Occupations	89,884	98,290	8,406	9.35
51-0000	Production Occupations	190,774	202,164	11,390	5.97
53-0000	Transportation and Material Moving Occupations	139,171	151,912	12,741	9.15
	Total	2,067,426	2,250,656	183,230	8.86

Source: S.C. Dept. of Employment and Workforce, Occupational Employment Projections Program

Growing or Declining Statewide Occupations

One goal of projecting employment is to understand which occupations are growing and which ones are declining. This information can help career advisors in the workforce development community or school guidance offices lead their clients into meaningful careers or avoid obsolete ones. **Figure 15** highlights the fastest growing and declining occupations statewide in percentage terms over the projection period 2014-2024. Many of the listed growing occupations are in the Healthcare industry, while most of the declining occupations are being displaced by technological innovation.

Figure 15

Top 20 Statewide Projected Fastest Growing and Declining Occupations, 2014-2024

Rank	Fastest Growing	Fastest Declining
1	Home Health Aides	Fallers
2	Personal Care Aides	Logging Equipment Operators
3	Statisticians	Switchboard Operators, Including Answering Service
4	Occupational Therapy Assistants	First-Line Supervisors of Farming, Fishing, and Forestry Workers
5	Ambulance Drivers and Attendants	Postal Service Mail Sorters, Processors, and Processing Machine Operators
6	Operations Research Analysts	Foresters
7	Nurse Practitioners	Forest and Conservation Workers
8	Computer-Controlled Machine Tool Operators	Mail Clerks and Mail Machine Operators, Except Postal Service
9	Physical Therapist Assistants	Office Machine Operators, Except Computer
10	Nursing Instructors and Teachers, Postsecondary	Extruding and Drawing Machine Setters, Operators, and Tenders
11	Health Specialties Teachers, Postsecondary	Postal Service Clerks
12	Interpreters and Translators	Postal Service Mail Carriers
13	Education Administrators, Preschool and Childcare Center	Cutting, Punching, and Press Machine Setters, Operators, and Tenders
14	Health Technologists and Technicians, All Other	Lathe and Turning Machine Tool Setters, Operators, and Tenders
15	Web Developers	Molding, Coremaking, and Casting Machine Setters, Operators, and Tenders
16	Physician Assistants	Grinding, Lapping, Polishing, and Buffing Machine Tool Setters, Operators, and Tenders
17	Mathematical Science Teachers, Postsecondary	Welding, Soldering, and Brazing Machine Setters, Operators, and Tenders
18	Preschool Teachers, Except Special Education	Word Processors and Typists
19	Psychology Teachers, Postsecondary	Cooks, Fast Food
20	Self-Enrichment Education Teachers	Insurance Underwriters

Source: S.C. Dept. of Employment and Workforce, Occupational Employment Projections Program

Note: Fastest growing by percent increase with at least 100 new positions; fastest declining by percent decrease with at least 50 fewer positions.

Local Workforce Development Area Occupational Employment Projections

Figure 16 presents the key metric from the LWDA Occupational Employment Projections for 2014-2024, average annual job openings, as well as the percent of total for each LWDA.

The economy is expected to produce more than 73,600 job openings annually in the 12 WDAs from 2014 to 2024. This figure includes jobs added to expand employment but also to replace employees who leave occupations permanently, such as by retiring.

Midlands and Trident LWDAs are expected to have more than 12,000 job openings per year, while Santee-Lynches LWDA, with the smallest share of openings at 3.4 percent, should add nearly 2,500.

Figure 16

S.C. Local Workforce Development Area Projected Annual Job Openings

Workforce Area	Total Annual Job Openings	Percent of Total
Catawba	4,394	6.0%
Greenville	10,002	13.6%
Lowcountry	3,677	5.0%
Lower Savannah	3,998	5.4%
Midlands	12,687	17.2%
Pee Dee	4,484	6.1%
Santee-Lynches	2,499	3.4%
Trident	12,270	16.7%
Upper Savannah	3,014	4.1%
Upstate	5,962	8.1%
Waccamaw	6,127	8.3%
WorkLink	4,530	6.2%
Total	73,644	100.0%

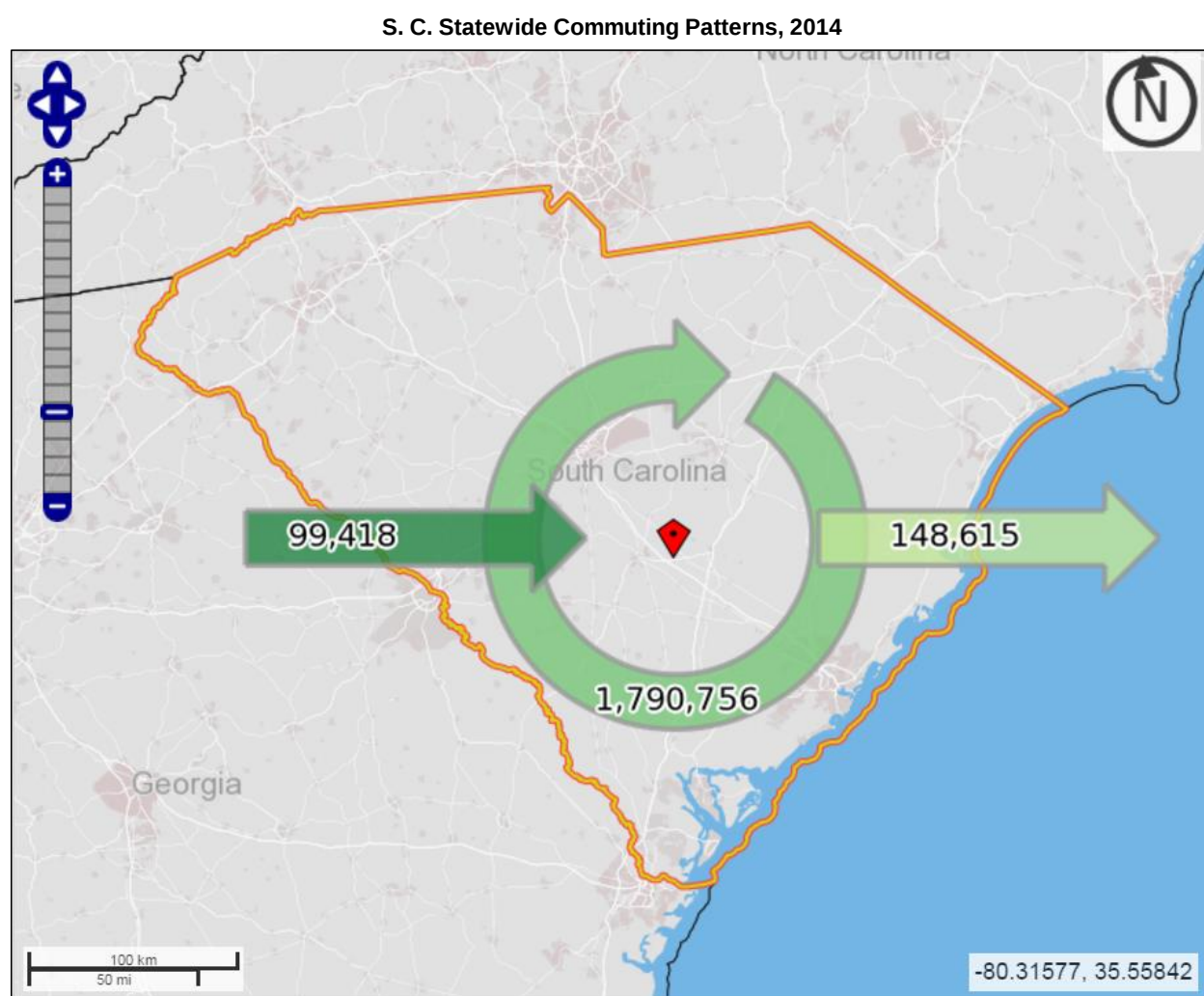
Source: S.C. Dept. of Employment and Workforce, Occupational Employment Projections Program

South Carolina Commuting Patterns

Another measure of the economy in South Carolina is referred to as commuting patterns. These are trips workers make from their home to their job with at least one end of the commute within the state.

The map in **Figure 17** presents an overview of commuting patterns for the year 2014. Estimates of 1,790,756 jobs are held by workers living and working in South Carolina. Over 99,400 additional jobs in the state are held by residents of other states, while 148,600 jobs in other states are held by South Carolina residents. Of the 99,400 jobs in state held by an out-of-state resident, 55,000 are held by North Carolina residents, and 28,000 are held by Georgia residents. North Carolina is the most popular work destination for South Carolina's outbound commuters with 91,000 jobs, followed by Georgia with 35,000 jobs.

Figure 17



Job Characteristics and Labor Supply-Demand Gap

Job Skills

Understanding in-demand job skills can help educators set curriculum to train workers in order to meet future demand. The Occupational Information Network (O*NET) of the U.S. Department of Labor defines job skills as capacities developed through education or experience that help one perform the job, such as "reading comprehension." The table in **Figure 18** identifies the number of projected annual job openings over the period 2014-2024 by Occupational Information Network job skill and Local Workforce Development Area in South Carolina.

Figure 18

Annual Job Openings by Job Skill and Local Workforce Development Area

Skill/Geography	Catawba	Greenville	Lowcountry	Lower Savannah	Midlands	Pee Dee	Santee Lynch	Trident	Upper Savannah	Upstate	Waccamaw	Worklink
Active Listening	999	2,129	612	856	3,159	944	491	2,781	589	1,145	1,012	887
Speaking	973	1,967	657	790	2,928	933	517	2,668	569	1,106	937	874
Reading Comprehension	397	836	251	346	1,490	371	206	1,264	227	401	373	399
Social Perceptiveness	379	783	275	339	1,242	426	266	1,085	254	438	438	355
Critical Thinking	309	631	200	250	1,078	277	141	926	166	320	288	282
Monitoring	247	505	159	221	661	219	117	631	150	280	275	214
Service Orientation	161	379	146	170	622	313	131	633	159	251	236	209
Writing	159	425	113	197	693	168	83	594	105	207	188	213
Coordination	198	414	141	191	590	186	103	535	133	227	240	177
Instructing	218	297	133	149	574	196	110	511	136	247	196	242
Learning Strategies	177	300	134	133	485	178	100	475	125	199	166	193
Judgment and Decision Making	143	331	97	135	531	121	56	454	69	158	130	121
Repairing	80	156	60	75	180	82	46	201	65	161	109	117
Equipment Maintenance	78	153	58	74	168	78	45	192	64	160	104	111
Complex Problem Solving	72	148	59	59	256	69	33	227	43	83	67	65
Time Management	66	127	45	84	217	78	41	193	58	75	66	58
Management of Personnel Resources	63	141	42	86	203	61	33	189	41	87	71	51
Operation Monitoring	87	113	12	63	99	68	31	167	47	148	43	92
Operation and Control	48	48	20	44	45	38	23	88	20	52	44	32
Science	26	66	20	20	74	31	27	97	17	38	27	35
Persuasion	22	76	19	21	127	18	7	96	6	26	26	15
Active Learning	23	33	10	15	87	20	6	112	14	24	25	30
Systems Evaluation	28	49	9	8	122	10	3	93	4	14	18	11
Programming	24	55	7	6	101	11	3	60	4	11	12	15
Negotiation	14	48	15	13	82	11	5	45	3	14	10	11
Mathematics	11	30	7	9	58	6	5	53	5	14	14	12
Troubleshooting	5	24	2	4	22	10	3	25	2	8	7	7
Installation	4	8	1	6	2	13	1	4	4	9	2	4
Operations Analysis	5	0	0	0	5	2	0	4	0	0	0	5
Quality Control Analysis	0	1	0	0	2	1	1	1	1	0	0	0

Source: S.C. Dept. of Employment and Workforce, Occupational Employment Projections Program, 2014-2024

The top skills for most of the LWDAs are:

- Active Listening
- Speaking
- Reading Comprehension
- Social Perceptiveness
- Critical Thinking

The top skills are more general in nature and are required by many occupations and can be sharpened with proper training. More specific job skills, such as Installation or Operations Analysis, are less widespread and demanded and relate to particular occupations.

Job Knowledge

Another set of information that is relevant for educators is in-demand job knowledge. Job knowledge, as defined by O*NET, is an organized sets of principles and facts that apply to a wide range of situations, such as knowledge of “mathematics,” “chemistry” or “fine arts.” The table in **Figure 19** identifies the number of projected annual job openings over the period 2014-2024 by O*NET job knowledge and LWDA.

Figure 19

Annual Job Openings by Job Knowledge and Local Workforce Development Area

Knowledge/Geography	Catawba	Greenville	Lowcountry	Lower Savannah	Midlands	Pee Dee	Santee Lynches	Trident	Upper Savannah	Upstate	Waccamaw	Worklink
Customer and Personal Service	1,801	3,902	1,647	1,548	5,328	1,761	977	5,310	1,025	2,123	2,967	1,758
English Language	747	1,599	539	656	2,733	817	462	2,297	465	869	786	776
Education and Training	331	588	235	280	1,025	386	201	974	224	412	340	407
Administration and Management	288	620	287	306	906	304	146	744	194	325	358	260
Psychology	240	469	209	207	832	353	216	783	191	333	251	283
Medicine and Dentistry	201	474	172	171	726	297	162	838	152	291	262	270
Clerical	229	538	213	211	730	219	115	626	146	250	265	219
Mathematics	176	497	81	138	536	148	63	498	94	183	130	223
Mechanical	156	340	92	166	421	176	88	471	113	265	176	200
Sales and Marketing	157	415	97	112	484	140	64	435	65	207	233	124
Building and Construction	125	369	111	135	415	88	77	495	79	157	183	132
Computers and Electronics	154	299	41	57	478	67	26	474	36	107	68	69
Engineering and Technology	110	342	25	72	299	65	27	369	46	157	54	119
Public Safety and Security	83	164	91	91	312	117	91	228	90	114	133	102
Economics and Accounting	71	207	65	93	284	62	22	217	40	71	91	48
Law and Government	66	145	73	76	313	75	39	196	48	69	87	58
Therapy and Counseling	65	137	59	68	234	85	74	178	42	84	67	65
Production and Processing	60	158	14	53	211	66	38	105	68	166	46	91
Design	62	197	18	31	169	32	13	170	22	63	28	61
Biology	37	87	32	32	133	45	35	198	27	59	40	53
Transportation	29	59	32	95	86	45	20	155	35	48	49	40
Physics	30	91	2	12	71	25	6	68	12	20	8	50
Sociology and Anthropology	21	36	15	33	103	20	39	50	11	18	18	29
Personnel and Human Resources	21	68	13	18	83	26	8	70	11	27	20	16
Communications and Media	20	74	13	10	91	11	8	71	13	23	29	17
Chemistry	21	29	4	7	59	12	4	34	6	15	21	22
Telecommunications	10	34	7	8	43	5	4	52	9	15	12	11
Fine Arts	9	11	3	3	21	2	4	16	6	9	24	6
Food Production	5	9	12	6	17	10	4	17	6	5	13	6
Philosophy and Theology	2	8	2	3	11	2	3	6	3	8	2	5
Geography	2	4	2	3	14	2	2	7	3	3	4	3
Foreign Language	2	6	2	1	11	1	1	9	1	3	2	1
History and Archeology	1	4	1	1	9	1	1	6	1	2	2	3

Source: S.C. Dept. of Employment and Workforce, Occupational Employment Projections Program, 2014-2024

The top job knowledge categories for most LWDAs are:

- Customer and Personal Service
- English Language
- Education and Training
- Administration and Management
- Psychology

Similar to the top job skills, the top knowledges are more general in nature and are required by many occupations. More specific job skills, such as Foreign Language or Geography, are less widespread and demanded, and they relate to particular occupations.

Labor Market Supply-Demand Gap

A tool workforce professionals can use to help them understand the labor market is the supply-demand gap analysis. A gap analysis of labor supply and demand compares the number of student completions from public and independent postsecondary schools with projected annual job openings that require education beyond high school. This analysis uses data from the S.C. Commission on Higher Education (CHE) and compares it to the latest available analysis on the average annual job openings from S.C. Department of Employment and Workforce's Occupational Employment Projections Program, 2014-2024, which shows the openings for an average year over the 10-year period. The openings shown are for those occupations requiring more than a high school education, as defined by the U.S. Bureau of Labor Statistics (BLS).

The CHE program completion database covers the most recently available school year 2015-2016 and includes the Classification of Instructional Programs (CIP) code, the institution name and number of graduates. Each CIP code is matched to one of 16 career clusters for comparison to the job openings data. The job openings data details the expected job openings in each LWDA for an average year over the period 2014 to 2024 and includes the educational job requirements to enter the occupation, the typical work experience needed for the job, the on-the-job training needed for the position and the occupational code, which is matched to a career cluster.

The CHE databases were summarized by career cluster and by LWDA where each institution is located. The employment projections were summarized by career cluster for the education levels above high school. A comparison was made for the two primary data sets in terms of the number of graduates to the number of projected job openings for each of the two variables. **Figures 20, 21 and 22** present tables highlighting the entire analysis.

Figure 20

South Carolina Postsecondary Program Completers, 2015-2016 (Labor Supply)

Career Cluster/WDA	Catawba	Greenville	Lowcountry	Lower Savannah	Midlands	Pee Dee	Santee-Lynches	Trident	Upper Savannah	Upstate	Waccamaw	WorkLink	Grand Total
Agriculture, Food & Natural Resources	16			5	33		36	39	26	35	31	515	736
Architecture & Construction	46	68	40	68	113	41	12	110	62	26	112	213	911
Arts, Audio/Video Technology & Communications	149	263	21	135	592	53	7	512	68	158	246	360	2,564
Business Management & Administration	404	381	129	270	992	267	75	1,091	348	526	321	914	5,718
Education & Training	581	884	180	1,122	1,828	387	175	1,355	379	919	1,251	1,296	10,357
Finance	40	154	3	33	621	89	21	244	18	104	113	385	1,825
Government & Public Administration	28	63		39	234	14	1	212	40	50	33	124	838
Health Science	237	904	176	600	1,935	417	208	1,771	444	652	516	631	8,491
Hospitality & Tourism		84	43	9	175			288	12		78		689
Human Services	238	323	59	198	1,260	199	107	422	178	277	221	389	3,871
Information Technology	57	127	17	129	318	48	55	367	48	159	73	282	1,680
Law, Public Safety, Corrections & Security	40	93	15	141	615	34	37	325	23	130	44	81	1,578
Manufacturing	238	246	25	167	83	225	86	131	327	126	77	278	2,009
Marketing	32	53		53	628	55		65		9	83	270	1,248
Science, Technology, Engineering & Mathematics	229	300	87	311	1,979	247	56	1,334	234	404	413	2,387	7,981
Transportation, Distribution & Logistics	22	288	19	72	123	49	7	183	6	16	16	63	864
Grand Total	2,357	4,231	814	3,352	11,529	2,125	883	8,449	2,213	3,591	3,628	8,188	51,360

Source: S.C. Commission on Higher Education (CHE)

Figure 21

South Carolina Projected Annual Job Openings Requiring Postsecondary Education (Labor Demand)

Career Cluster/WDA	Catawba	Greenville	Lowcountry	Lower Savannah	Midlands	Pee Dee	Santee-Lynches	Trident	Upper Savannah	Upstate	Waccamaw	WorkLink	Grand Total
Agriculture, Food & Natural Resources	29	100	34	11	123	25	9	197	12	22	44	20	626
Architecture & Construction	12	71	10	12	59	12	6	75	9	14	25	15	320
Arts, Audio/Video Technology & Communications	16	85	9	10	94	9	6	81	14	25	33	15	397
Business, Management & Administration	55	147	29	32	255	45	13	229	26	48	45	35	959
Education & Training	308	388	211	195	791	296	158	691	139	323	228	326	4,054
Finance	97	241	66	103	316	70	25	246	47	85	99	62	1,457
Government & Public Administration	25	48	18	21	85	28	15	86	12	20	20	19	397
Health Science	259	674	235	222	1,016	443	176	1,057	221	422	360	364	5,449
Hospitality & Tourism	87	185	61	55	181	50	33	178	40	88	108	68	1,134
Human Services	40	71	24	17	155	41	21	105	11	32	39	31	587
Information Technology	81	176	18	11	283	32	4	287	11	53	31	32	1,019
Law, Public Safety, Corrections & Security	39	83	43	12	187	41	10	101	13	37	43	26	635
Manufacturing	17	63	9	21	74	21	9	82	7	27	28	34	392
Marketing	55	148	22	22	166	29	10	112	17	63	38	27	709
Science, Technology, Engineering & Mathematics	83	261	15	48	239	51	23	282	35	148	31	73	1,289
Transportation, Distribution & Logistics	60	139	48	99	178	89	28	183	44	142	59	49	1,118
Grand Total	1,263	2,880	852	891	4,202	1,282	546	3,992	658	1,549	1,231	1,196	20,542

Source: S.C. Dept. of Employment and Workforce, Occupational Employment Projections Program

Figure 22

South Carolina Labor Supply-Demand Gap

Career Cluster/WDA	Catawba	Greenville	Lowcountry	Lower Savannah	Midlands	Pee Dee	Santee-Lynches	Trident	Upper Savannah	Upstate	Waccamaw	WorkLink	Grand Total
Agriculture, Food & Natural Resources	-13	-100	-34	-6	-90	-25	27	-158	14	13	-13	495	110
Architecture & Construction	34	-3	30	56	54	29	6	35	53	12	87	198	591
Arts, Audio/Video Technology & Communications	133	178	12	125	498	44	1	431	54	133	213	345	2,167
Business, Management & Administration	349	234	100	238	737	222	62	862	322	478	276	879	4,759
Education & Training	273	496	-31	927	1,037	91	17	664	240	596	1,023	970	6,303
Finance	-57	-87	-63	-70	305	19	-4	-2	-29	19	14	323	368
Government & Public Administration	3	15	-18	18	149	-14	-14	126	28	30	13	105	441
Health Science	-22	230	-59	378	919	-26	32	714	223	230	156	267	3,042
Hospitality & Tourism	-87	-101	-18	-46	-6	-50	-33	110	-28	-88	-30	-68	-445
Human Services	198	252	35	181	1,105	158	86	317	167	245	182	358	3,284
Information Technology	-24	-49	-1	118	35	16	51	80	37	106	42	250	661
Law, Public Safety, Corrections & Security	1	10	-28	129	428	-7	27	224	10	93	1	55	943
Manufacturing	221	183	16	146	9	204	77	49	320	99	49	244	1,617
Marketing	-23	-95	-22	31	462	26	-10	-47	-17	-54	45	243	539
Science, Technology, Engineering & Mathematics	146	39	72	263	1,740	196	33	1,052	199	256	382	2,314	6,692
Transportation, Distribution & Logistics	-38	149	-29	-27	-55	-40	-21	0	-38	-126	-43	14	-254
Grand Total	1,094	1,351	-38	2,461	7,327	843	337	4,457	1,555	2,042	2,397	6,992	30,814

Source: S.C. Dept. of Employment and Workforce, S.C. CHE

Several observations can be made concerning the results. One finding is that there are over 30,000 more total graduates than job openings for the year. In the overwhelming number of cases, the number of graduates is greater than the number of openings for each of the cluster/LWDA combinations. Notable exceptions are:

- More graduates are required in Hospitality and Tourism in all LWDAs but one.
- More graduates are required in Transportation, Distribution and Logistics in nearly all LWDAs.
- More graduates are required in Agriculture, Food and Natural Resources in most of the LWDAs.

The gap analysis is just a representation of the true gap between labor supply and labor demand. Of course, more than just recent graduates would be able to fill the projected job openings. Though the graduates complete their training at one institution, it is clear that many could take jobs in other locations outside of the LWDA where the school is located. The analysis also does not consider potential out-of-state candidates that could fill in-state job openings.

Jobless Populations Facing Challenges

South Carolina citizens and its workforce are very diverse. Different population groups often face varying challenges and barriers and may need more specific or dedicated services to meet their employment and training needs.

Hispanics

Hispanics have accounted for a significant portion of the state's population growth. This population more than doubled from 2000 to 2010 and has continued to increase, reaching 254,092 people, or 5.3 percent of the state's population in 2015. While the median age of the state's population is 38.6 years, the median age for Hispanics in South Carolina is 26.2 years.

Native Americans

The 2015 U.S. Census of Annual Estimates of Resident Population shows that there were 26,923 single-race American Indians/Alaskan Natives in South Carolina, down from 39,255 in 2010. The state is home to several Native American tribes and groups, including the Catawba, the Pee Dee, the Waccamaw and the Santee.

Native Americans in our state recorded a poverty rate of 26.2 percent, compared to the overall poverty rate of 17.9 percent. Native Americans had higher percentages for those with a high school diploma or GED (34.0 percent for Native Americans vs. 29.8 percent for total population) and for those with some college but no degree (24.0 percent vs. 21.0 percent) but were well below for higher levels of education, especially a Bachelor's Degree (7.5 percent vs. 16.5 percent).

Homeless

On a given night in January 2016, there were an estimated 5,054 homeless people in South Carolina, including 738 veterans, according to the U.S. Interagency Council on Homelessness. This is a decrease of 5.6 percent from 2015 to 2016. The state's homeless rate per 10,000 people is 10.3, while the national rate is 17.7.

In South Carolina, youth less than 18 years old made up 16 percent of those who were homeless and veterans accounted for an additional 15 percent. Forty-three percent were white, 52 percent were African-American and 5 percent were of another racial category. The homeless population included 14 percent who reported a serious mental illness and 17 percent who had a substance abuse disorder.

According to the National Alliance to End Homelessness, the first step in supporting the homeless population is to get them into housing. The Alliance suggests rapid rehousing because “By connecting people with a home, they are in a better position to address other challenges that may have led to their homelessness, such as obtaining employment or addressing substance abuse issues.” It also suggests that longer-term housing may need to be arranged, along with an introduction or increase in income through training and employment support services.

Veterans

According to the U.S. Census Bureau's 2015 American Community Survey (ACS), South Carolina had 370,000 civilian veterans aged 18 or older. Veterans made up 9.8 percent of the state's total population, compared to 8.3 percent of the nation's population. From 2014 to 2015, veteran unemployment fell from 8.6 percent to 7.4 percent.

Because less than one percent of Americans serve in the military today, veterans may have to help potential employers understand some of the parallels between the military and civilian environments. They may also have to overcome stereotypes employers may have such as thinking that all post 9/11-veterans have Post-Traumatic Stress Disorder (PTSD). The most recent returning veterans have a one-in-five probability of having PTSD, and it has been shown that being employed can actually ease the effects of the disorder.

Veterans have a great deal to contribute to any company. Many veterans have jobs skills that transfer directly to the civilian world. According to data from LinkedIn, veterans typically have the top soft skills that employers are looking for: integrity, attention to detail, leadership, problem solving and a team-player mentality.

Ex-Offenders

As of June 2016, South Carolina had an inmate population of 20,951 with 9,147 inmates being released in 2016. The average age of an inmate was 38 years old. African-Americans made up 61 percent of the total

with whites at 36 percent and other races with 3 percent. The average sentence length is almost 14 years with the average time actually served being about two years and eight months.

Just over half, 51 percent, of inmates do not have a high school diploma or GED. Inmates age 17-21 without a high school diploma or GED are mandated to attend school and are assigned to one of the S.C. Department of Corrections' 10 high schools. Inmates older than 21 who are not high school or GED graduates are served in S. C. Department of Corrections' Adult Education programs.

Due to changes in GED test administration (going from hard copy to computer-based) and a high vacancy rate of instructors, educational opportunities for inmates were reduced in Program Year 2016. GED/high school academic credentials numbered 192 (down from 1,209 the previous year), and 2,566 vocational courses were taken. The S.C. Department of Corrections has been authorized as a Department of Labor (DOL) Apprenticeship site, awarding six DOL apprenticeship credentials in Fiscal Year (FY) 2016.

People who have been imprisoned face several challenges re-entering society, such as overcoming their past criminal history when seeking employment. Lack of education, poor computer skills, poor people skills, low self-esteem, substance abuse problems and access to transportation are problems that may be faced by an ex-offender during the job search.

Juvenile Offenders

In 2016, the S.C. Department of Juvenile Justice (DJJ) handled 15,429 cases, 1.7 percent less than in 2015. In these cases, 2,948 were paroled or on probation, and the average offender population at a facility was 373. The average age of a youth at DJJ was 15 years with 67 percent male and 56 percent African-American. The top five offenses putting a person into DJJ custody are assault and battery, disturbing school, shoplifting, public disorderly conduct and simple marijuana possession.

DJJ's Job Readiness Training Center (JRTC) had a total enrollment of 1,029 for its training classes in FY2016. Students at JRTC took classes in financial literacy, culinary arts, leadership, interviewing skills, public speaking, interpersonal skills and in many other areas related to life skills and job placement. During fiscal year 2015-2016, 475 youth completed job-readiness training in DJJ's eight community job-readiness training sites, located throughout the state.

DJJ made a substantial increase during 2015-2016 by placing more than 600 youth into jobs or paid internships.

Limited English Proficiency

The 2015 ACS lists 86,989 people of foreign-born status in South Carolina who were identified as having Limited English Proficiency (LEP). Noncitizens were more likely to have LEP than citizens (foreign-born but naturalized).

Immigrants and those with LEP often need help adjusting to life in a new country. They may need help finding housing, jobs, educational/training resources or other services. They may need legal aid services to assist with paperwork and documentation. Communication is important no matter what job someone holds. The main issue here is language, and this can be overcome with instructional training and services.

Illiterate

According to a study conducted in April 2014 by the U.S. Department of Education and the National Institute of Literacy, 14 percent or 32 million adults in the U.S. can't read. Twenty-one percent of adults in the U.S. read below a fifth grade level, and 19 percent of high school graduates cannot read.

This is not much better than it was in 2003 when the National Assessment of Adult Literacy found that 14 percent of U.S. adults had a "below basic" literacy level, and 29 percent reported a "basic" reading level.

Readingpartners.org says that in 2016, only 34 percent of fourth graders in South Carolina read at grade level. Nationally, South Carolina ranks 39th in literacy. According to The Literacy Center, a Bluffton, S.C. non-profit, the state also has the 13th highest rate of functional illiteracy.

In June 2014, the S. C. General Assembly passed the Read to Succeed Act with the goal of closing the reading gap and ensuring that all students graduate from high school with the reading and writing skills they need to be college and career-ready.

Being illiterate increases the likelihood of being below the poverty line and having high health costs. This population tends to be older, and their family and friends may not even know that they cannot read. A feeling of shock is often expressed when someone confesses to being illiterate, leaving the person who is unable to read or write with feelings of shame. Illiteracy may stem from poor education or a learning disorder. Education and training for this group is essential considering reading is a central part of learning and succeeding in the workplace.

Migrant/Seasonal Workers

According to the U.S. Department of Labor's National Agricultural Workers Survey in the 2013-2014 survey period, 69 percent of all farm workers in the U.S. are born in Mexico, 80 percent are Hispanic, and 70 percent speak English less than "well." Sixty percent had less than a high school education.

The U.S. Department of Labor reported that for Program Year 2014, South Carolina's One Stop Centers had taken 1,221 job applications for Migrant/Seasonal Farm Workers (MSFW) and referred 308 of those served (25 percent) to a job. South Carolina Legal Services, a nonprofit organization providing legal services to low income state residents, notes that there are 28 registered migrant worker labor camps in 12 counties in the state.

The growing pace of economic globalization has created more migrant workers than ever before. Unemployment and increasing poverty have prompted many workers in developing countries to seek

work elsewhere. Unskilled and cheap labor is wanted in developed nations, so the two forces meet. Migrant workers and their families have poorer physical health than the general population, higher infant mortality rates and shorter life expectancy. Migrant farm workers often toil 12-14 hours a day, every day, during a harvest season. Issues affecting this community include poverty, worker abuse, sanitation, legal issues and safety. Language barriers and mistrust of government are also common in the community.

Foster Care

As of June 2016, there were 4,030 children receiving in-home foster care services, up from 3,860 in the previous program year. The average time a child spent in foster care was 11.8 months in Fiscal Year 2016, the lowest average during the past five years, according to the S. C. Department of Social Services (DSS).

This group may lack stability as children and may have problems associated with their home situations. On a positive note, educational services are available for the children. This helps them overcome their unique issues and pursue a path for employment. In PY 2016, 254 children in the foster care system received support for adult education, GED program, summer school and/or Governor's School. The number of individuals receiving post-secondary funding equaled 422, and 282 foster care participants received employment assistance (certification, child care, travel assistance and interim housing).

Temporary Assistance for Needy Families (TANF)

In June 2016, the number of TANF households in South Carolina was 23,795, the lowest level since 2007. Youth, 18 years and younger, accounted for 76 percent of all recipients. The average monthly grant amount to a TANF recipient employed through a S. C. Department of Social Services program was \$218. This group may have difficulty obtaining a family-sustaining wage. Even when they have jobs, the pay is often low. Training and employment support should be provided as this group may often lack the education and needed skills to get a better job.

Disabled

Estimates from U.S. Census Bureau's American Community Survey in 2015 show that 14.8 percent of the state's civilian noninstitutionalized population was disabled. The disabled labor force equaled more than 127,400 people. More than 21,000 of those people were unemployed, yielding a disabled unemployment rate of 19.8 percent. Ambulatory difficulty was the top disability for both those employed and those not in the labor force, while a cognitive difficulty was reported as the top disability for those who were unemployed. Therefore, this group will continue to need focused services to overcome substantial barriers to employment.

Required Language

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