

South Carolina Economic Analysis Report

June 30

2018

An examination of the
state's economy and
workforce.



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About DEW 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 \$219.1 billion in 2017 or 26th in the nation. The growth over the year in real dollars was 2.3 percent. The growth of the GDP in real dollars from the first quarter of 2014 to the fourth quarter of 2017 was \$18.4 billion. Manufacturing, Construction, Professional and Business Services, and Health Care and Social Assistance showed 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 3.6 percent outpaced the nation's growth of 3.1 in 2017 and reached \$203.1 billion dollars. South Carolina's per capita personal income in 2017 was \$40,421 or 80 percent of the U.S average.

The state's population continues to increase. Over the period 2012-2016, the percent of the population graduating high school and those obtaining at least a Bachelor's degree increased to 86.6 percent and 27.2 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 the mark of 4.5 percent or below for entire year of 2017.

Leisure and Hospitality; Professional and Business Services; and Trade, Transportation, and Utilities led the state in private sector industry employment growth from 2015 to 2017. Each of the state's metropolitan areas grew in employment levels. South Carolina had over 2.0 million wage and salary employees in 2017 with an average hourly wage of \$20.31. The state's industry employment is projected to grow by 11.9 percent over the period 2016 to 2026.

The state is projected to have a level of occupational employment over 2.462 million by 2026 with 284,000 average annual job openings. Regional industry hiring trends show strong growth in Accommodation and Food Services; Administration; and Transportation and Warehousing across the state in the recent past.

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, which compares projected job openings to recent postsecondary graduates, shows a labor shortage for positions requiring education beyond high school, reversing previous analyses due to a change in federal methodology in estimating job openings.

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 several years. Most economic indicators point to increasing activity. Mark Vitner, Senior Economist with Wells Fargo Securities, wrote in his economic roundup in April 2018, “South Carolina’s economy kicked back into high-gear in 2017. On a year-on-year basis, the rate of real GDP growth in the state has steadily accelerated to 2.9 percent in Q3-2017 from 1.2 percent in Q3-2016. Much of the increase in output growth is owed to an expanding industrial base, which has not only attracted large manufacturing operations to the area but also numerous suppliers. South Carolina’s payroll gains have been broad-based over the past year. Job gains, however, have moderated somewhat following several years of above-average growth.”¹

The S.C. Department of Commerce reported that in 2017 the state recruited capital investments worth \$5.24 billion and 18,445 new jobs on 157 economic development projects. This was the fourth time in seven years the state topped \$5 billion.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 S.C. Department of Employment and Workforce (DEW) 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, its metropolitan areas and its industries. 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.

Statewide and metropolitan areas’ 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 follow. An analysis of regional industry hiring trends succeeds the projections narrative. Content concerning job openings by required job skills and knowledge 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.

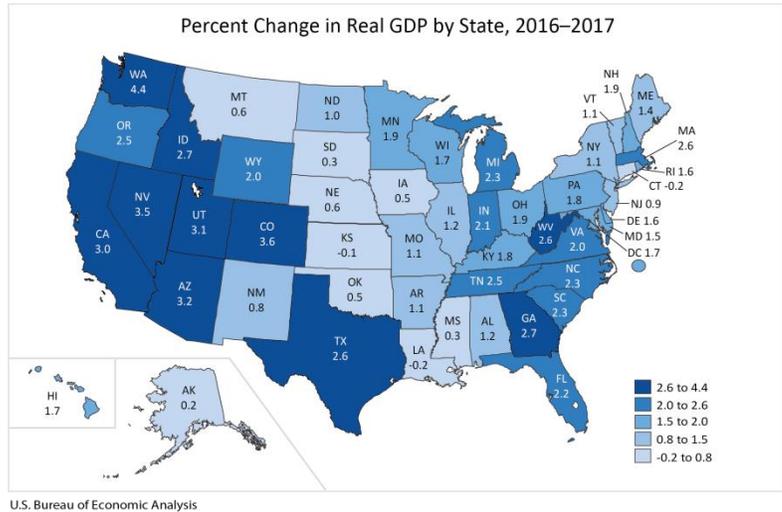
¹ Wells Fargo, Southern States: 2018 Economic Outlook, April 20, 2018; <https://www08.wellsfargomedia.com/assets/pdf/commercial/insights/economics/regional-reports/regional-south-chartbook-spring-20180420.pdf>; accessed on June 13, 2018.

² S.C. Department of Commerce, 2017 Industry Recruitment Report; <https://www.sccommerce.com/news/state-south-carolina-announces-2017-industry-recruitment-results>; accessed on June 13, 2018.

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 2017, South Carolina had a growth of 2.3 percent in real dollars from the previous year, while the nation grew at only 2.1 percent. **Figure 1** highlights the percentage growth of the nation’s GDP for the year 2016-2017. South Carolina grew faster than Florida, Virginia and Alabama in the southeastern region and faster than New York, Pennsylvania, Ohio and Minnesota, nationally. In current dollars, the GDP for South Carolina was \$219.1 billion in 2017. This figure ranks 26th in the nation.

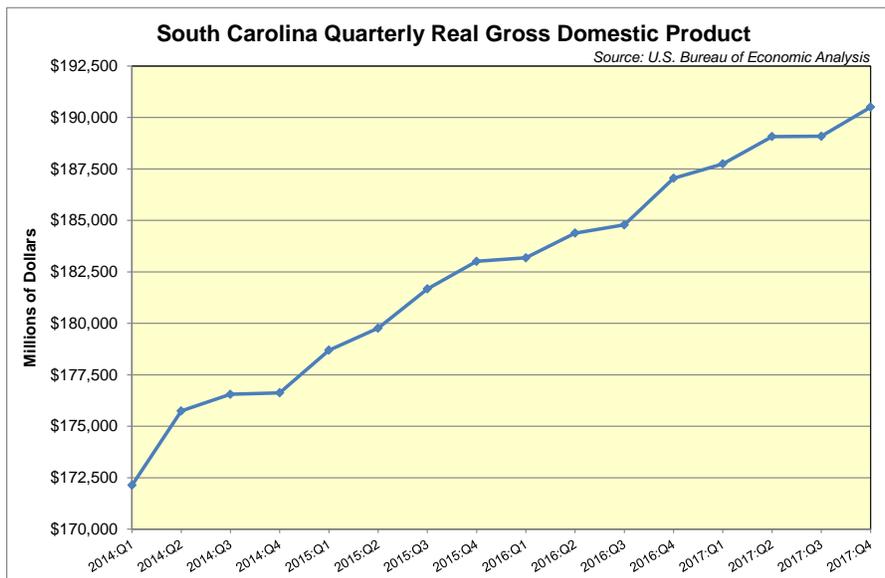
Figure 1



GDP Over the Past Four Years

South Carolina has sustained healthy growth in the past four years, expanding from \$172.1 billion dollars in the first quarter of 2014 to \$190.5 billion dollars in the fourth quarter of 2017 in real, inflation-adjusted terms as shown in **Figure 2**. Growth increased in every quarter over the period. The growth did slow down, however, when examining fourth quarter year-over-year results, declining from 3.6 percent from 2014 to 2015 to 2.2 percent from 2015 to 2016 to 1.8 percent from 2016 to 2017.

Figure 2



Real GDP by Industry

For a more detailed view of the state’s economy, **Figure 3** reveals South Carolina’s Real GDP by industry for 2014-2017. Overall, the economy grew over \$13.8 billion dollars in real terms over the 4-year period, or 7.9 percent. Manufacturing grew by 4.4 percent to \$31.1 billion dollars from 2014 to 2015 and rose to \$32.3 billion in 2017. This sector represented 17.1 percent of the state’s economy in 2017. Finance, Insurance, and Real Estate grew to \$31.3 billion dollars by 2017. 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	2017	Percent Growth from Previous Year			2017 Percent of Total
					2015	2016	2017	
All industry total	\$175,262	\$180,786	\$184,849	\$189,102	3.2%	2.2%	2.3%	100.0%
Private industries	\$147,800	\$152,550	\$156,421	\$160,562	3.2%	2.5%	2.6%	84.9%
Agriculture, forestry, fishing, and hunting	\$803	\$841	\$939	\$911	4.7%	11.7%	-3.0%	0.5%
Mining, quarrying, and oil and gas extraction	\$246	\$385	\$390	\$385	56.5%	1.3%	-1.3%	0.2%
Utilities	\$4,306	\$4,246	\$4,543	\$4,487	-1.4%	7.0%	-1.2%	2.4%
Construction	\$7,838	\$8,287	\$8,866	\$9,298	5.7%	7.0%	4.9%	4.9%
Manufacturing	\$29,802	\$31,115	\$31,612	\$32,331	4.4%	1.6%	2.3%	17.1%
Durable goods manufacturing	\$17,882	\$18,106	\$19,455	\$19,781	1.3%	7.5%	1.7%	10.5%
Nondurable goods manufacturing	\$12,038	\$13,087	\$12,323	\$12,709	8.7%	-5.8%	3.1%	6.7%
Wholesale trade	\$10,245	\$10,565	\$10,781	\$11,169	3.1%	2.0%	3.6%	5.9%
Retail trade	\$12,741	\$12,955	\$13,575	\$13,858	1.7%	4.8%	2.1%	7.3%
Transportation and warehousing	\$4,038	\$4,206	\$4,269	\$4,418	4.2%	1.5%	3.5%	2.3%
Information	\$4,629	\$5,259	\$5,339	\$5,602	13.6%	1.5%	4.9%	3.0%
Finance, insurance, real estate, rental, and leasing	\$29,573	\$30,181	\$30,755	\$31,292	2.1%	1.9%	1.7%	16.5%
Finance and insurance	\$7,304	\$7,527	\$7,486	\$7,616	3.1%	-0.5%	1.7%	4.0%
Real estate and rental and leasing	\$22,334	\$22,712	\$23,354	\$23,762	1.7%	2.8%	1.7%	12.6%
Professional and business services	\$18,544	\$18,836	\$19,419	\$20,355	1.6%	3.1%	4.8%	10.8%
Professional, scientific, and technical services	\$8,899	\$9,290	\$9,867	\$10,172	4.4%	6.2%	3.1%	5.4%
Management of companies and enterprises	\$1,770	\$1,746	\$1,944	\$2,306	-1.4%	11.3%	18.6%	1.2%
Administrative and waste management services	\$7,878	\$7,795	\$7,614	\$7,909	-1.1%	-2.3%	3.9%	4.2%
Educational services, health care, and social assistance	\$12,793	\$13,312	\$13,498	\$13,859	4.1%	1.4%	2.7%	7.3%
Educational services	\$1,161	\$1,165	\$1,167	\$1,146	0.3%	0.2%	-1.8%	0.6%
Health care and social assistance	\$11,635	\$12,155	\$12,341	\$12,728	4.5%	1.5%	3.1%	6.7%
Arts, entertainment, recreation, accommodation, and food services	\$8,091	\$8,220	\$8,299	\$8,427	1.6%	1.0%	1.5%	4.5%
Arts, entertainment, and recreation	\$1,187	\$1,245	\$1,286	\$1,317	4.9%	3.3%	2.4%	0.7%
Accommodation and food services	\$6,903	\$6,976	\$7,015	\$7,112	1.1%	0.6%	1.4%	3.8%
Other services (except government and government enterprises)	\$4,203	\$4,233	\$4,233	\$4,287	0.7%	0.0%	1.3%	2.3%
Government	\$27,514	\$28,292	\$28,495	\$28,621	2.8%	0.7%	0.4%	15.1%

Source: U.S. Bureau of Economic Analysis

Note: Dollar values in millions of chained 2009 dollars.

Real GDP by Metropolitan Statistical Area

Figure 4 shows the Real GDP for the state’s Metropolitan Statistical Areas (MSA) over the period 2011-2016. Growth for the MSAs has been mixed in the recovery period since the Great Recession with only three 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, the Charleston MSA and the Spartanburg MSA each grew by over 3 percent in 2015 and 2016. The U.S. metropolitan areas as a whole did not reach that threshold in either year. In 2016, the Greenville, Columbia and Charleston MSAs each had GDPs over \$33 billion dollars. Spartanburg grew by 4.2 percent in 2016, while Florence and Sumter declined.

Figure 4
Real Gross Domestic Product (GDP) by Metropolitan Area, 2011-2016

Area	Millions of chained (2009) dollars						Percent Change				
	2011	2012	2013	2014	2015	2016*	2012	2013	2014	2015	2016*
U.S. metropolitan areas	13,400,379	13,688,966	13,888,049	14,214,225	14,619,757	14,863,879	2.2	1.5	2.3	2.9	1.7
Augusta-Richmond County, GA-SC	19,949	20,035	19,753	19,949	20,267	20,404	0.4	-1.4	1.0	1.6	0.7
Charleston-North Charleston, SC	29,494	30,116	30,668	31,827	32,962	33,982	2.1	1.8	3.8	3.6	3.1
Charlotte-Concord-Gastonia, NC-SC	122,522	125,472	126,707	130,280	136,196	140,815	2.4	1.0	2.8	4.5	3.4
Columbia, SC	31,813	31,808	32,535	33,667	34,865	35,261	0.0	2.3	3.5	3.6	1.1
Florence, SC	6,793	6,909	7,203	7,217	7,254	7,221	1.7	4.3	0.2	0.5	-0.5
Greenville-Anderson-Mauldin, SC	32,096	31,989	32,599	33,655	34,913	35,755	-0.3	1.9	3.2	3.7	2.4
Hilton Head Island-Bluffton-Beaufort, SC	7,248	7,240	7,322	7,619	7,753	7,885	-0.1	1.1	4.1	1.8	1.7
Myrtle Beach-Conway-North Myrtle Beach, SC-NC	13,201	13,485	13,818	14,057	14,406	14,566	2.1	2.5	1.7	2.5	1.1
Spartanburg, SC	11,801	11,645	11,860	12,333	12,710	13,245	-1.3	1.8	4.0	3.1	4.2
Sumter, SC	3,125	3,330	3,306	3,313	3,269	3,249	6.5	-0.7	0.2	-1.3	-0.6

* Advance statistics

Source: U.S. Bureau of Economic Analysis

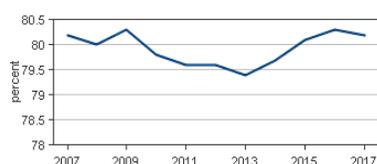
State Personal Income

Personal income is defined as the income received for persons in a given area from all sources. South Carolina’s personal income in 2017 in current dollars was \$203.1 billion dollars, an increase of 3.6 percent from a year earlier, outpacing the U.S. growth rate of 3.1 percent. The state’s personal income ranked 25th 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 2017 was \$40,421. The per capita income is 80 percent of the national average of \$50,392. The state had trended down before 2013 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 take advantage of their workforce skills in regions best suited for them.

Figure 6 displays such information for the state over the 5-year period 2012-2016. 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 2016, nearly 87 percent of the population aged 25 and older had a high school education, and over 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, 2012-2016

Subject	South Carolina				
	2016 Estimate	2015 Estimate	2014 Estimate	2013 Estimate	2012 Estimate
EDUCATIONAL ATTAINMENT					
Population 25 years and over	3,388,476	3,319,832	3,260,929	3,198,816	3,151,616
Less than 9th grade	4.4%	4.4%	4.5%	5.0%	5.2%
9th to 12th grade, no diploma	9.0%	9.2%	9.3%	9.3%	10.0%
High school graduate (includes equivalency)	29.0%	29.4%	30.3%	29.4%	29.8%
Some college, no degree	21.0%	20.7%	20.7%	21.3%	21.1%
Associate's degree	9.4%	9.4%	8.8%	8.9%	8.9%
Bachelor's degree	17.4%	17.3%	16.7%	16.6%	16.0%
Graduate or professional degree	9.8%	9.5%	9.6%	9.5%	9.1%
Percent high school graduate or higher	86.6%	86.3%	86.1%	85.6%	84.9%
Percent bachelor's degree or higher	27.2%	26.8%	26.3%	26.1%	25.1%
VETERAN STATUS					
Civilian population 18 years and over	3,828,451	3,778,952	3,719,245	3,669,343	3,609,405
Civilian veterans	9.6%	9.8%	9.9%	10.0%	10.9%
DISABILITY STATUS OF THE CIVILIAN					
Total Civilian Noninstitutionalized Population	4,861,188	4,801,301	4,733,742	4,678,122	4,623,171
With a disability	15.2%	14.8%	14.8%	14.5%	14.0%
Under 18 years	1,097,385	1,086,607	1,080,779	1,076,621	1,078,022
With a disability	4.9%	4.8%	4.5%	4.6%	4.0%
18 to 64 years	2,951,505	2,938,107	2,908,636	2,893,842	2,868,533
With a disability	13.2%	12.6%	12.9%	12.7%	12.4%
65 years and over	812,298	776,587	744,327	707,659	676,616
With a disability	36.2%	37.4%	37.3%	37.2%	37.1%
RESIDENCE 1 YEAR AGO					
Population 1 year and over	4,903,788	4,839,984	4,780,659	4,720,602	4,668,886
Same house	85.2%	84.8%	84.6%	84.7%	84.2%
Different house in the U.S.	14.4%	14.7%	15.0%	14.9%	15.4%
Same county	7.7%	8.1%	8.2%	8.3%	8.6%
Different county	6.8%	6.7%	6.8%	6.6%	6.8%
Same state	3.4%	3.1%	3.2%	3.1%	3.5%
Different state	3.4%	3.5%	3.6%	3.5%	3.4%
Abroad	0.4%	0.4%	0.4%	0.4%	0.4%

Source: U.S. Census Bureau, American Community Survey, 2016 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 1.3 percent over the 5-year period in the state. The percentage of South Carolinians with a disability among the civilian noninstitutional population has increased over the period by more than a full percentage point; however, the percentage of those over the age of 65 with a disability has declined to 36.2 percent. The table demonstrates that a smaller portion of the population moved from their residence in 2016 than in 2012, falling from 15.4 percent to 14.4 percent, countering typical action in a growing economy.

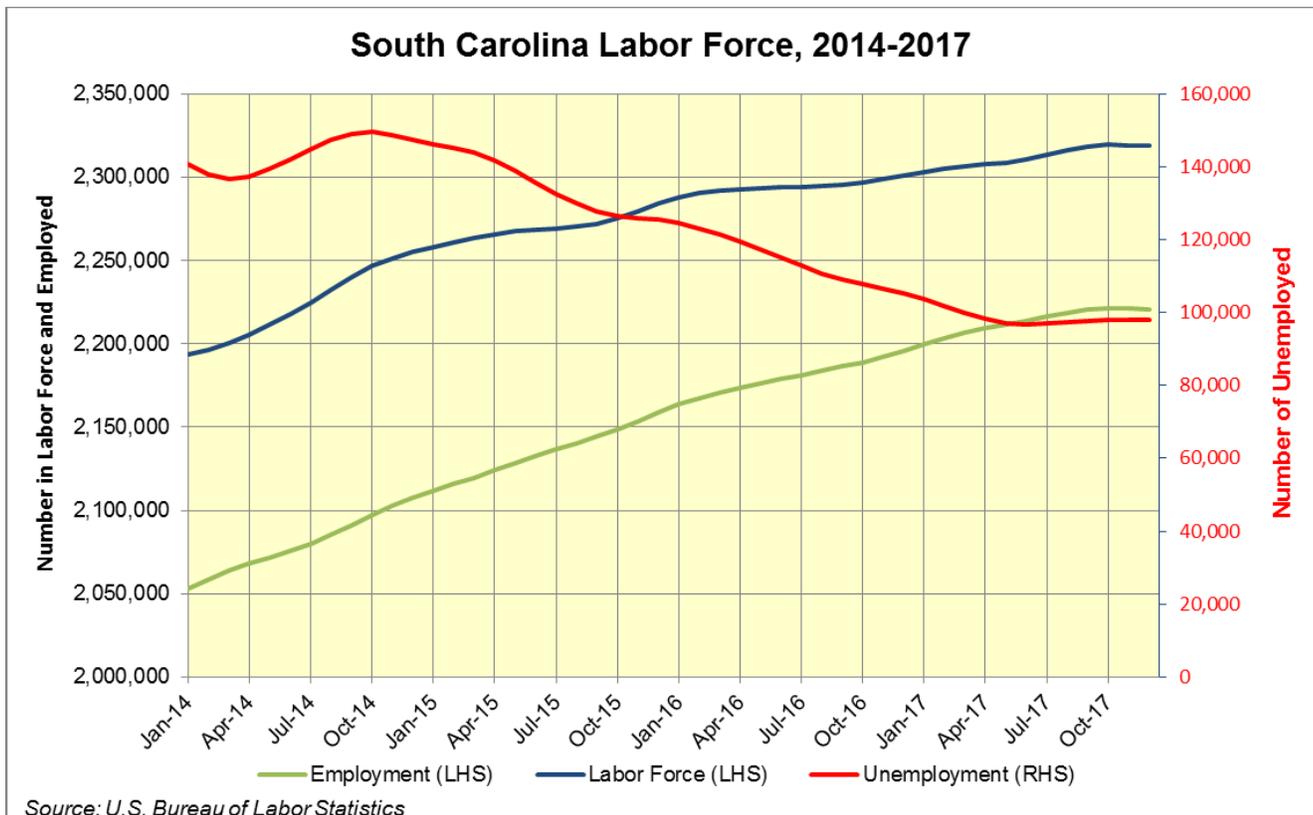
Over the recent past, South Carolina’s population, aged 25 and above, has been on the rise. From 2012 to 2016, the state increased by nearly 237,000 people or 7.5 percent, fueling the state’s growing workforce as highlighted in the following section.

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 2014 to 2017.

Over the period 2014-2017, the labor market has improved drastically. The labor force has grown by 125,000 people over that time, reaching almost 2.319 million in December 2017.

Figure 7



Source: U.S. Bureau of Labor Statistics

Employment has risen steadily over the period, climbing by 168,000 people to 2,220,845 in December 2017, an 8.2 percent increase from January 2014.

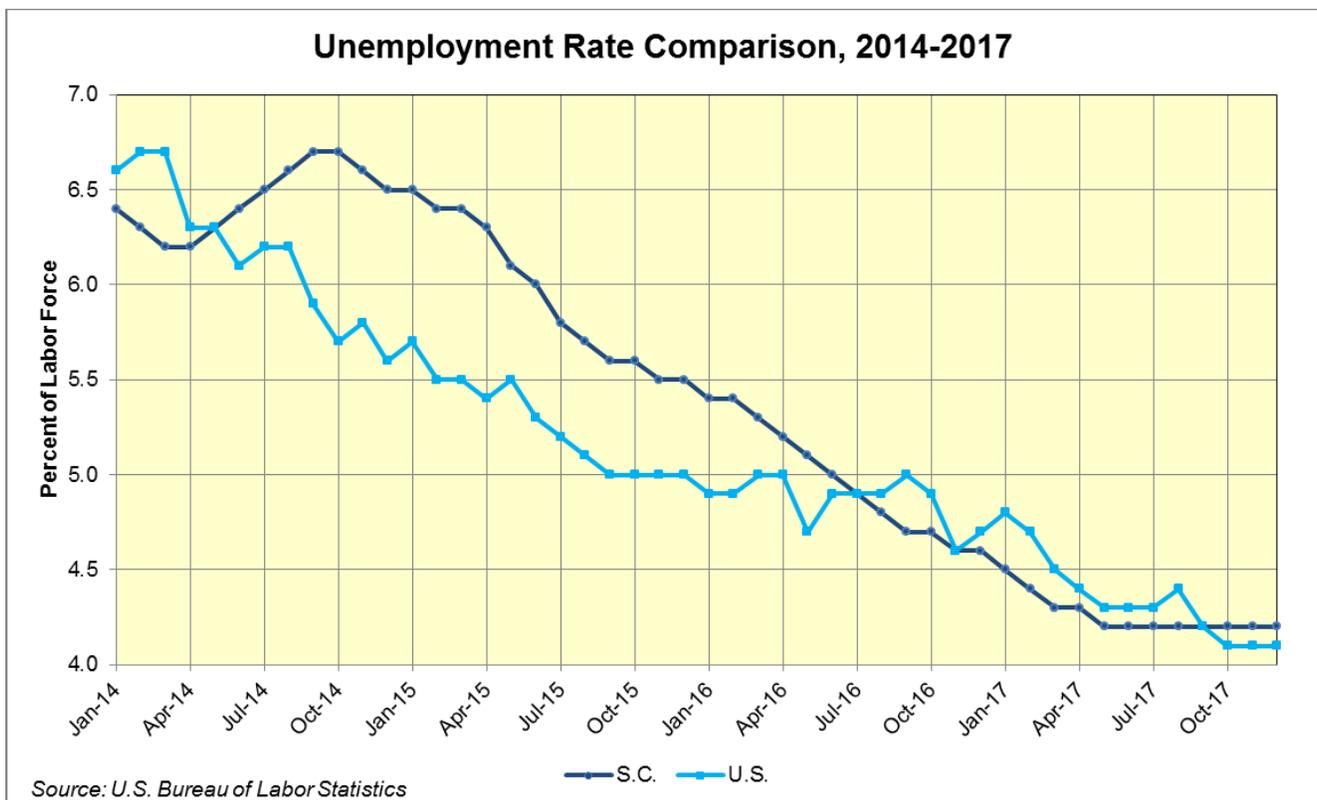
Unemployment has fallen by nearly 43,000 people over the three-year period from over 140,000 in January 2014 to 97,879 in December 2017, a decline of 30 percent.

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 latest four-year period. In January 2014, the rate stood at 6.4 percent, and by the end of 2017, the figure had dropped to 4.2 percent. Likewise, the U.S. unemployment rate fell from 6.6 percent to 4.1 percent over the same period. As a comparison, in January and February of 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 rates over the recent four-year period.

South Carolina’s rate held at 4.2 percent for the last eight months of 2017, and the state has had a rate at 4.5 percent or below for all 12 months of the year. The state has not seen rates at or below the 4.5 percent threshold over this length of time since the 1997-2001 period, where the state maintained the threshold for 44 consecutive months.

Figure 8



State and Metropolitan Area Industry Employment Trends

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 84,300 jobs, or 4.2 percent, between 2015 and 2017 as shown in the table in **Figure 9**. The sector leading the growth is Leisure and Hospitality, adding 15,100 positions; followed by Professional and Business Services, gaining 13,900 jobs; and Trade, Transportation, and Utilities, increasing by 12,000 new jobs.

Each metropolitan area grew in employment from 2015 to 2017 with Charleston adding 19,200 jobs, followed by Greenville gaining 13,700. Spartanburg grew by 8.1 percent in manufacturing jobs, trailing only Greenville in sector jobs. Spartanburg had 21 percent growth in the Professional and Business Services sector as well, followed by Myrtle Beach, gaining 14 percent.

Figure 9

State and Metropolitan Area Industry Employment Trends (000)

Industry Sector	Year	South Carolina	Charleston-North Charleston ⁽¹⁾	Columbia ⁽¹⁾	Florence	Greenville-Anderson-Mauldin ⁽¹⁾	Hilton Head Island-Bluffton-Beaufort	Myrtle Beach-Conway-North Myrtle Beach ⁽¹⁾	Spartanburg ⁽¹⁾	Sumter
Total	2015	2,006.7	334.2	386.0	86.2	401.7	74.7	155.3	142.4	38.7
	2016	2,054.7	345.2	395.4	87.4	409.3	76.3	160.9	147.1	39.2
	2017	2,091.0	353.4	396.6	88.1	415.4	78.9	166.6	153.1	39.3
Mining and Logging	2015	4.0	-	-	-	-	-	-	-	-
	2016	4.2	-	-	-	-	-	-	-	-
	2017	4.3	-	-	-	-	-	-	-	-
Construction	2015	89.5	17.7	17.5	-	16.7	-	8.2	6.1	-
	2016	97.1	19.1	18.9	-	18.0	-	8.9	6.7	-
	2017	100.8	20.2	19.5	-	18.1	-	9.7	7.3	-
Manufacturing	2015	233.4	25.6	29.0	-	55.5	-	4.5	28.5	6.6
	2016	235.6	25.9	28.7	-	57.1	-	4.6	29.2	6.5
	2017	240.6	26.5	29.0	-	58.2	-	4.7	30.8	6.7
Trade, transportation, and utilities	2015	385.1	61.8	70.9	18.3	74.8	-	33.9	32.3	-
	2016	393.8	63.6	73.7	18.6	75.4	-	35.0	32.9	-
	2017	397.1	64.3	73.8	18.8	75.7	-	36.2	33.4	-
Information	2015	26.9	5.4	5.5	-	7.4	-	2.4	1.1	-
	2016	27.2	5.7	5.7	-	7.1	-	2.3	1.0	-
	2017	27.6	6.1	5.6	-	7.3	-	2.3	0.9	-
Financial activities	2015	97.8	14.2	30.4	-	16.7	-	9.0	4.7	-
	2016	100.7	14.5	30.9	-	17.8	-	9.1	4.6	-
	2017	101.9	14.9	31.2	-	18.4	-	9.0	4.7	-
Professional and business services	2015	262.9	50.0	48.9	-	69.8	-	13.5	15.8	-
	2016	269.6	52.4	49.8	-	69.0	-	14.4	17.2	-
	2017	276.8	54.8	48.0	-	69.3	-	15.4	19.1	-
Education and health services	2015	234.6	37.9	46.8	-	46.7	-	16.3	13.3	-
	2016	240.9	38.7	48.0	-	48.7	-	16.9	13.8	-
	2017	246.3	40.1	48.8	-	49.8	-	17.5	14.7	-
Leisure and hospitality	2015	238.7	43.9	36.6	-	41.0	-	40.1	12.9	-
	2016	247.5	46.6	37.9	-	42.3	-	41.5	13.3	-
	2017	253.8	47.9	38.7	-	43.6	-	42.6	13.3	-
Other services	2015	73.7	13.8	15.8	-	13.7	-	5.9	4.9	-
	2016	74.7	13.8	16.2	-	14.1	-	6.1	5.2	-
	2017	75.8	13.8	16.1	-	14.3	-	6.2	5.2	-
Government	2015	360.2	64.0	84.7	16.7	59.3	11.4	21.6	23.0	6.9
	2016	363.4	64.9	85.5	16.7	59.9	11.6	22.2	23.3	7.0
	2017	366.0	64.8	85.9	16.7	60.8	11.7	22.9	23.7	6.8

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

(1) Mining and logging is combined with construction.

'-' symbol indicates that the data is not available.

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. In South Carolina, six industry sectors led the state in 2017 in terms of employment specialization with LQs greater than 1.0 as measured by the Quarterly Census of Employment and Wages (QCEW)—Utilities (1.58), Manufacturing (1.37), Administrative and Waste Services (1.26), Accommodation and Food Services (1.16), Retail Trade (1.10) and Construction (1.03).

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

South Carolina Occupational Employment

South Carolina had 2.009 million wage and salary occupational employees in 2017 with an average hourly wage of \$20.31. **Figure 10** summarizes more than 800 detailed occupations into major occupational groups and presents employment and average wage information.

Figure 10

South Carolina Statewide Occupational Employment Survey, 2017

Occupation Code	Occupation Title	Total Employment	Average Hourly Wage
00-0000	All Occupations	2,009,460	\$20.31
11-0000	Management Occupations	87,760	\$48.44
13-0000	Business and Financial Operations Occupations	75,380	\$30.18
15-0000	Computer and Mathematical Occupations	39,530	\$34.94
17-0000	Architecture and Engineering Occupations	37,700	\$37.35
19-0000	Life, Physical, and Social Science Occupations	9,700	\$30.82
21-0000	Community and Social Service Occupations	22,640	\$20.51
23-0000	Legal Occupations	13,150	\$35.48
25-0000	Education, Training, and Library Occupations	112,900	\$23.03
27-0000	Arts, Design, Entertainment, Sports, and Media Occupations	17,900	\$22.12
29-0000	Healthcare Practitioners and Technical Occupations	121,130	\$35.40
31-0000	Healthcare Support Occupations	53,900	\$13.48
33-0000	Protective Service Occupations	47,960	\$18.01
35-0000	Food Preparation and Serving Related Occupations	200,840	\$10.23
37-0000	Building and Grounds Cleaning and Maintenance Occupations	70,060	\$11.63
39-0000	Personal Care and Service Occupations	56,630	\$11.07
41-0000	Sales and Related Occupations	221,070	\$16.03
43-0000	Office and Administrative Support Occupations	301,110	\$16.40
45-0000	Farming, Fishing, and Forestry Occupations	3,930	\$17.08
47-0000	Construction and Extraction Occupations	78,820	\$19.14
49-0000	Installation, Maintenance, and Repair Occupations	93,840	\$21.09
51-0000	Production Occupations	195,020	\$18.25
53-0000	Transportation and Material Moving Occupations	148,510	\$15.61

Source: U.S. Bureau of Labor Statistics, Occupational Employment Survey (OES)

The Office and Administrative Support category had the highest occupational employment with 301,100 employees, followed by Sales and Related occupations with 221,100, and Food Preparation and Serving occupations with 200,800 employees. The highest average hourly wages were found in Management occupations at \$48.44 per hour, Architecture and Engineering occupations at \$37.35 per hour, and Legal occupations at \$35.48 per hour. Food Preparation and Serving Related occupations had the lowest average wage at \$10.23 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 Statewide Top Occupations, 2017

Occupation Code	Occupation Title	Total Employment	Average Hourly Wage
41-2031	Retail Salespersons	69,360	\$12.10
41-2011	Cashiers	64,400	\$9.19
35-3021	Combined Food Preparation and Serving Workers, Including Fast Food	63,190	\$8.81
53-7062	Laborers and Freight, Stock, and Material Movers, Hand	52,850	\$13.39
43-4051	Customer Service Representatives	51,580	\$15.10
51-2098	Assemblers and Fabricators, All Other, Including Team Assemblers	43,810	\$16.49
29-1141	Registered Nurses	43,200	\$30.59
43-6014	Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	36,720	\$16.30
35-3031	Waiters and Waitresses	36,370	\$9.77
11-1021	General and Operations Managers	32,370	\$48.24
37-2011	Janitors and Cleaners, Except Maids and Housekeeping Cleaners	31,590	\$10.88
43-9061	Office Clerks, General	30,710	\$13.10
43-5081	Stock Clerks and Order Fillers	28,080	\$12.10
53-3032	Heavy and Tractor-Trailer Truck Drivers	27,610	\$20.32
49-9071	Maintenance and Repair Workers, General	26,860	\$17.73
43-1011	First-Line Supervisors of Office and Administrative Support Workers	25,570	\$24.81
35-2014	Cooks, Restaurant	23,180	\$10.66
41-1011	First-Line Supervisors of Retail Sales Workers	22,070	\$19.15
25-2021	Elementary School Teachers, Except Special Education *	21,830	\$24.28
31-1014	Nursing Assistants	20,730	\$11.93

Source: U.S. Bureau of Labor Statistics, Occupational Employment Survey (OES)

* Annual wages divided by 2,080 hours to obtain hourly rate.

Statewide Industry and Occupational Employment Projections

Statewide Industry Employment Projections

Figure 12 presents the latest available statewide industry employment projections over the 10-year period 2016-2026. Overall, all industries are projected to grow by 11.9 percent or by 245,900 jobs. Health Care and Social Assistance; Administrative and Support and Waste Management; and Accommodation and Food Services are each expected to increase employment by over 25,000 jobs. Mining 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 2026. Accommodation and Food Services and Manufacturing and would be in third and fourth places, respectively.

Figure 12

South Carolina Industry Employment Projections, 2016-2026

Industry Code	Industry Title	Estimated 2016 Employment	Projected 2026 Employment	Numeric Change	Percent Change
000000	Total All Industries	2,072,388	2,318,285	245,897	11.9%
110000	Agriculture, Forestry, Fishing and Hunting	38,073	33,505	-4,568	-12.0%
210000	Mining	1,461	1,421	-40	-2.7%
220000	Utilities	12,377	12,463	86	0.7%
230000	Construction	94,341	106,713	12,372	13.1%
310000	Manufacturing	238,195	250,200	12,005	5.0%
420000	Wholesale Trade	71,774	81,378	9,604	13.4%
440000	Retail Trade	246,756	266,624	19,868	8.1%
480000	Transportation and Warehousing	62,893	79,589	16,696	26.5%
510000	Information	27,082	28,772	1,690	6.2%
520000	Finance and Insurance	68,155	73,211	5,056	7.4%
530000	Real Estate and Rental and Leasing	29,296	34,237	4,941	16.9%
540000	Professional, Scientific, and Technical Services	93,458	105,874	12,416	13.3%
550000	Management of Companies and Enterprises	17,893	20,503	2,610	14.6%
560000	Administrative and Support and Waste Management	158,037	187,212	29,175	18.5%
610000	Educational Services	168,072	183,258	15,186	9.0%
620000	Health Care and Social Assistance	243,973	295,962	51,989	21.3%
710000	Arts, Entertainment, and Recreation	29,373	32,273	2,900	9.9%
720000	Accommodation and Food Services	217,852	263,148	45,296	20.8%
810000	Other Services	98,596	103,611	5,015	5.1%
900000	Government	154,731	158,331	3,600	2.3%

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

Change in Projected Occupational Openings Methodology

To measure occupational separations for 2016-2026 projections, the U.S. Bureau of Labor Statistics (BLS) has implemented a new separations methodology. The separations methodology was developed to better capture a more accurate picture of the workforce and give BLS the ability to differentiate between

workers who are leaving the labor force entirely, for example, for retirement and those who are changing jobs and leaving an occupation, such as for a promotion to a different position.

Projections are utilized to predict what will happen in the future in regard to occupations, and help stakeholders determine what areas of the economy are expected to see growth and decline. Projections help higher education professionals, labor market analysts and employers determine what occupations will have more openings than others to best train and prepare the workforce.

Workers once entered the labor force at a young age, typically working until retirement in the same occupation. New, younger workers would replace them once they retired. It is no secret the workforce has changed. From technology advancements and trends in the workforce, to policy updates and new standards in human resources, the U.S. labor force is vastly different.

These changes in the workforce have brought about the need for a new methodology.

Workers today are more likely to be transient and work in a number of occupations during their lifetime. The separations methodology accounts for this workforce trend, capturing reasons workers leave an occupation other than retirement, such as changing careers, being promoted into management or completing a retraining program.

“The once-traditional career path of entering an occupation at a young age and working until retirement in that same occupation is no longer the norm for American workers,” said Michael Wolf, chief of the Division of Occupation Employment Projections at BLS. “Now, it’s common for workers to work in a number of occupations throughout the course of their career. The separations methodology captures different job changes and allows us to better produce employment projections.”

The separations methodology incorporates past data patterns and trends to generate employment projections. Projections from the past replacements methodology should not be compared with projections created using the new separations methodology. Past projections become outdated when actual employment catches up with them or new projections are released. These are no longer an accurate representation of the workforce.

Projections produced using the new separations methodology will vary from the projections derived from the replacements methodology. This is due to methodological, not conceptual, factors. To compare historical trends to current projections, a practitioner should use actual employment figures from the time period. When new projections are released, old projections become obsolete.³

³ Projections Managing Partnership, Separations Methodology; <http://www.lmiontheweb.org/PMP/separations/>; accessed on July 20, 2018.

The result of the change in methodology shows up in the projections metric of job openings. An increase in the number of separations compared to the number of replacements results in an increase in the number of job openings compared to previous projections' analyses.

Statewide Occupational Employment Projections

The statewide occupational projections include self-employed workers in addition to the industry employment estimates for the period 2016-2026. **Figure 13** highlights the projections by major occupation group. Office and Administrative Support occupations are projected to have the highest number of employees in 2026 with 328,000, followed by Sales and Related occupations with 266,000, and Food Preparation and Serving Related occupations with 241,000. Production occupations are expected to employ 209,000 in 2026.

Overall, the state is projected to have over 284,000 annual job openings in all occupations. Food Preparation and Serving Related occupations would be expected to have the most openings at over 40,000 per year over the 10-year period, followed by Office and Administrative Support and Sales and Related occupations with over 37,000 openings each. These estimates of job openings incorporate the new separations methodology mentioned in the previous section.

Figure 13

South Carolina Occupational Employment Projections, 2016-2026

Occupation Code	Occupation Title	Estimated 2016 Employment	Projected 2026 Employment	Numeric Change	Percent Change	Annual Total Openings
00-0000	Total, All Occupations	2,205,704	2,462,025	256,321	11.6%	284,336
11-0000	Management Occupations	127,849	137,823	9,974	7.8%	11,214
13-0000	Business and Financial Operations Occupations	86,283	98,373	12,090	14.0%	9,370
15-0000	Computer and Mathematical Occupations	39,597	45,397	5,800	14.7%	3,350
17-0000	Architecture and Engineering Occupations	39,528	45,055	5,527	14.0%	3,539
19-0000	Life, Physical, and Social Science Occupations	10,547	11,445	898	8.5%	1,061
21-0000	Community and Social Service Occupations	29,911	33,785	3,874	13.0%	3,719
23-0000	Legal Occupations	15,401	17,126	1,725	11.2%	1,224
25-0000	Education, Training, and Library Occupations	114,248	126,874	12,626	11.1%	11,265
27-0000	Arts, Design, Entertainment, Sports, and Media Occupations	25,317	27,205	1,888	7.5%	2,736
29-0000	Healthcare Practitioners and Technical Occupations	124,135	145,742	21,607	17.4%	9,233
31-0000	Healthcare Support Occupations	57,480	71,496	14,016	24.4%	8,548
33-0000	Protective Service Occupations	50,390	53,792	3,402	6.8%	5,424
35-0000	Food Preparation and Serving Related Occupations	199,899	240,664	40,765	20.4%	40,748
37-0000	Building and Grounds Cleaning and Maintenance Occupations	89,163	103,163	14,000	15.7%	13,349
39-0000	Personal Care and Service Occupations	76,554	89,122	12,568	16.4%	13,736
41-0000	Sales and Related Occupations	242,602	266,021	23,419	9.7%	37,196
43-0000	Office and Administrative Support Occupations	311,704	328,204	16,500	5.3%	37,442
45-0000	Farming, Fishing, and Forestry Occupations	23,738	20,899	(2,839)	-12.0%	2,982
47-0000	Construction and Extraction Occupations	91,604	102,607	11,003	12.0%	10,943
49-0000	Installation, Maintenance, and Repair Occupations	98,812	110,723	11,911	12.1%	10,989
51-0000	Production Occupations	198,592	209,334	10,742	5.4%	23,924
53-0000	Transportation and Material Moving Occupations	152,350	177,175	24,825	16.3%	22,346

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

Growing and 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 14** highlights the fastest growing and declining occupations statewide in percentage terms over the projection period 2016-2026. Many of the listed growing occupations are in the Healthcare industry, while most of the declining occupations are being displaced by technological innovation.

Figure 14

Top 20 Statewide Projected Fastest Growing and Declining Occupations, 2016-2026

Rank	Fastest Growing	Fastest Declining
1	Home Health Aides	Respiratory Therapy Technicians
2	Physician Assistants	Word Processors and Typists
3	Nurse Practitioners	Fallers
4	Statisticians	Computer Operators
5	Personal Care Aides	Legal Secretaries
6	Operations Research Analysts	Data Entry Keyers
7	Software Developers, Applications	Switchboard Operators, Including Answering Service
8	Physical Therapist Aides	Coin, Vending, and Amusement Machine Servicers and Repairers
9	Medical Assistants	Farmers, Ranchers, and Other Agricultural Managers
10	Respiratory Therapists	Executive Secretaries and Executive Administrative Assistants
11	Combined Food Preparation and Serving Workers	Farmworkers, Farm, Ranch, and Aquacultural Animals
12	Physical Therapist Assistants	Logging Equipment Operators
13	Massage Therapists	Engine and Other Machine Assemblers
14	Physical Therapists	Photographers
15	Health Specialties Teachers, Postsecondary	Farmworkers and Laborers, Crop, Nursery, and Greenhouse
16	Machine Feeders and Offbearers	Nuclear Power Reactor Operators
17	Occupational Therapists	Electrical and Electronic Equipment Assemblers
18	Health Technologists and Technicians, All Other	Agricultural Equipment Operators
19	Security and Fire Alarm Systems Installers	Structural Metal Fabricators and Fitters
20	Mental Health Counselors	Chemical Plant and System Operators

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.

Regional Workforce Area Industry Hiring Trends

A statistic that can shed light on the health of the state’s regional economies is the number of hires that are produced from the U.S. Census Bureau’s *Longitudinal-Employer Household Dynamics (LEHD)* Program. This data can give an indication of the recent actual experience of industry employers in adding to their workforces, i.e. actual labor demand.

While **Figure 15** displays the state’s Workforce Innovation and Opportunity Act (WIOA) map, **Figure 16** presents the key hiring metric for the WIOA regions in South Carolina by industry for two points in time, the third quarters of 2014 and 2017 as well as the numeric and percent change.

Figure 15

S.C. WIOA Regions

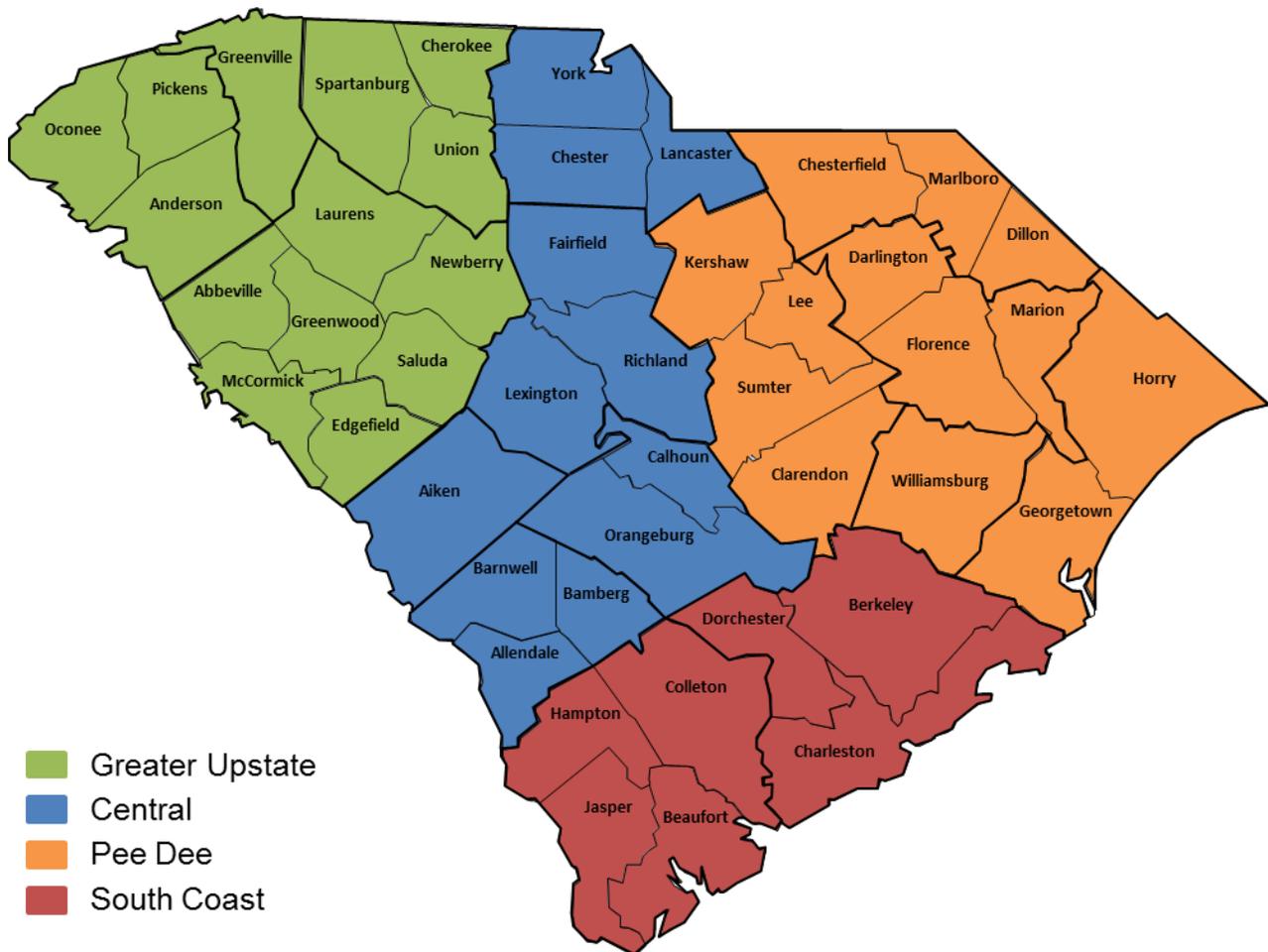


Figure 16

S.C. Hiring Trends by Industry and WIOA Region, Third Quarters of 2014 & 2017

Hires in 2017 Qtr 3

Industry Code	Industry	Greater Upstate	Central	Pee Dee	South Coast
0	All NAICS Sectors	138,358	124,871	69,007	88,922
11	Agriculture, Forestry, Fishing and Hunting	540	844	564	198
21	Mining, Quarrying, and Oil and Gas Extraction	21	39	75	38
22	Utilities (Data Suppressed)	0	0	0	0
23	Construction	5,975	6,158	4,217	6,216
31-33	Manufacturing	12,474	5,801	4,105	2,763
42	Wholesale Trade	3,268	2,823	1,144	1,471
44-45	Retail Trade	17,525	15,170	10,513	11,802
48-49	Transportation and Warehousing	5,072	7,165	1,735	2,755
51	Information	958	906	389	1,295
52	Finance and Insurance	4,187	2,633	747	1,457
53	Real Estate and Rental and Leasing	1,587	1,132	1,453	1,690
54	Professional, Scientific, and Technical Services	4,508	4,716	1,610	3,970
55	Management of Companies and Enterprises	1,231	823	314	456
56	Administrative and Support and Waste Management	34,392	22,802	8,960	13,261
61	Educational Services	6,513	6,220	2,363	5,020
62	Health Care and Social Assistance	10,531	9,741	6,168	7,154
71	Arts, Entertainment, and Recreation	1,737	1,818	1,764	1,755
72	Accommodation and Food Services	23,453	23,173	19,541	22,647
81	Other Services (except Public Administration)	2,789	3,250	1,778	2,897
92	Public Administration	1,442	4,970	1,417	1,241

Source: U.S. Census Bureau. (2018). Quarterly Workforce Indicators (1998-2017). Washington, DC: U.S. Census Bureau, Longitudinal-Employer Household Dynamics Program, accessed on (June 28, 2018) at [https://lehd.ces.census.gov/data/#qw. \(2018Q2\)](https://lehd.ces.census.gov/data/#qw. (2018Q2))

Hires in 2014 Qtr 3

Industry Code	Industry	Greater Upstate	Central	Pee Dee	South Coast
0	All NAICS Sectors	117,590	100,028	60,364	76,373
11	Agriculture, Forestry, Fishing and Hunting	501	627	725	430
21	Mining, Quarrying, and Oil and Gas Extraction	21	19	23	14
22	Utilities	126	203	73	65
23	Construction	5,017	5,033	3,198	4,533
31-33	Manufacturing	9,705	5,092	3,198	2,499
42	Wholesale Trade	2,575	2,294	956	1,204
44-45	Retail Trade	15,820	14,064	10,091	11,947
48-49	Transportation and Warehousing	3,637	2,547	1,336	2,228
51	Information	1,115	783	484	717
52	Finance and Insurance	1,583	2,196	594	969
53	Real Estate and Rental and Leasing	1,287	1,223	1,635	1,291
54	Professional, Scientific, and Technical Services	3,715	4,394	1,399	3,342
55	Management of Companies and Enterprises	895	484	293	335
56	Administrative and Support and Waste Management	29,699	20,075	7,659	11,582
61	Educational Services	6,950	5,947	2,368	4,394
62	Health Care and Social Assistance	9,113	8,831	5,680	6,260
71	Arts, Entertainment, and Recreation	2,442	2,111	1,893	1,538
72	Accommodation and Food Services	19,091	17,386	15,678	18,296
81	Other Services (except Public Administration)	2,493	2,802	1,760	2,563
92	Public Administration	1,804	3,912	1,318	2,165

Source: U.S. Census Bureau. (2018). Quarterly Workforce Indicators (1998-2017). Washington, DC: U.S. Census Bureau, Longitudinal-Employer Household Dynamics Program, accessed on (June 28, 2018) at [https://lehd.ces.census.gov/data/#qw. \(2018Q2\)](https://lehd.ces.census.gov/data/#qw. (2018Q2))

Figure 16 (cont'd)

S.C. Hiring Trends by Industry and WIOA Region, Third Quarters of 2014 & 2017 (cont'd)

Numeric Change in Hiring over Latest Three-Year Span

Industry Code	Industry	Greater Upstate	Central	Pee Dee	South Coast
0	All NAICS Sectors	20,768	24,843	8,643	12,549
11	Agriculture, Forestry, Fishing and Hunting	39	217	-161	-232
21	Mining, Quarrying, and Oil and Gas Extraction	0	20	52	24
22	Utilities	0	0	0	0
23	Construction	958	1,125	1,019	1,683
31-33	Manufacturing	2,769	709	907	264
42	Wholesale Trade	693	529	188	267
44-45	Retail Trade	1,705	1,106	422	-145
48-49	Transportation and Warehousing	1,435	4,618	399	527
51	Information	-157	123	-95	578
52	Finance and Insurance	2,604	437	153	488
53	Real Estate and Rental and Leasing	300	-91	-182	399
54	Professional, Scientific, and Technical Services	793	322	211	628
55	Management of Companies and Enterprises	336	339	21	121
56	Administrative and Support and Waste Management	4,693	2,727	1,301	1,679
61	Educational Services	-437	273	-5	626
62	Health Care and Social Assistance	1,418	910	488	894
71	Arts, Entertainment, and Recreation	-705	-293	-129	217
72	Accommodation and Food Services	4,362	5,787	3,863	4,351
81	Other Services (except Public Administration)	296	448	18	334
92	Public Administration	-362	1,058	99	-924

Source: U.S. Census Bureau. (2018). Quarterly Workforce Indicators (1998-2017). Washington, DC: U.S. Census Bureau, Longitudinal-Employer Household Dynamics Program, accessed on (June 28, 2018) at <https://lehd.ces.census.gov/data/#qwi>. (2018Q2), SCDEW

Percent Change in Hiring over Latest Three-Year Span

Industry Code	Industry	Greater Upstate	Central	Pee Dee	South Coast
0	All NAICS Sectors	18%	25%	14%	16%
11	Agriculture, Forestry, Fishing and Hunting	8%	35%	-22%	-54%
21	Mining, Quarrying, and Oil and Gas Extraction	0%	105%	226%	171%
22	Utilities	0%	0%	0%	0%
23	Construction	19%	22%	32%	37%
31-33	Manufacturing	29%	14%	28%	11%
42	Wholesale Trade	27%	23%	20%	22%
44-45	Retail Trade	11%	8%	4%	-1%
48-49	Transportation and Warehousing	39%	181%	30%	24%
51	Information	-14%	16%	-20%	81%
52	Finance and Insurance	164%	20%	26%	50%
53	Real Estate and Rental and Leasing	23%	-7%	-11%	31%
54	Professional, Scientific, and Technical Services	21%	7%	15%	19%
55	Management of Companies and Enterprises	38%	70%	7%	36%
56	Administrative and Support and Waste Management	16%	14%	17%	14%
61	Educational Services	-6%	5%	0%	14%
62	Health Care and Social Assistance	16%	10%	9%	14%
71	Arts, Entertainment, and Recreation	-29%	-14%	-7%	14%
72	Accommodation and Food Services	23%	33%	25%	24%
81	Other Services (except Public Administration)	12%	16%	1%	13%
92	Public Administration	-20%	27%	8%	-43%

Source: U.S. Census Bureau. (2018). Quarterly Workforce Indicators (1998-2017). Washington, DC: U.S. Census Bureau, Longitudinal-Employer Household Dynamics Program, accessed on (June 28, 2018) at <https://lehd.ces.census.gov/data/#qwi>. (2018Q2), SCDEW

Greater Upstate had more hiring than any region with 118,000 in 2014 and 138,000 in 2017, followed by Central, South Coast, and Pee Dee. Greater Upstate had several strong sectors of growth including, Administrative (+16%); Accommodation and Food Services (+23%); Finance and Insurance (+164%); and Manufacturing (+29%) each adding over 2,500 additional workers in 2017 than in 2014.

The Accommodation and Food Services as well as the Administrative sectors gained significantly in each of the regions in numeric terms. The Transportation and Warehousing sector grew in hiring by 181% over the span of three years in the Central region and gained by at least 24% in each of the other regions.

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 17** identifies the number of projected annual job openings over the period 2016-2026 by Occupational Information Network job skill for South Carolina statewide.

Figure 17

South Carolina Projected Job Openings by Job Skill Needed

Skill	Annual Job Openings
Active Listening	47,846
Speaking	44,255
Reading Comprehension	19,046
Social Perceptiveness	18,022
Critical Thinking	12,346
Monitoring	11,620
Writing	10,724
Coordination	9,823
Service Orientation	9,470
Instructing	7,891
Learning Strategies	6,535
Judgment and Decision Making	5,805
Repairing	4,503
Equipment Maintenance	4,321
Management of Personnel Resources	3,152
Time Management	2,958
Complex Problem Solving	2,638
Operation Monitoring	2,199
Operation and Control	1,674
Persuasion	1,532
Systems Evaluation	1,055
Active Learning	986
Science	890
Programming	742
Negotiation	592
Mathematics	574
Troubleshooting	383
Installation	118
Operations Analysis	102
Quality Control Analysis	25

Source: S.C. Dept. of Employment and Workforce, Occupational Projections Program, 2016-2026

The top skills for the state in terms of job openings 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 or Programming, 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 18** identifies the number of projected annual job openings over the period 2016-2026 by O*NET job knowledge for the state.

Figure 18

South Carolina Projected Job Openings by Job Knowledge Needed

Job Knowledge	Annual Job Openings	Job Knowledge	Annual Job Openings
Customer and Personal Service	116,107	Therapy and Counseling	3,012
English Language	39,008	Design	2,417
Clerical	17,666	Transportation	2,295
Administration and Management	14,639	Biology	1,651
Education and Training	12,673	Sociology and Anthropology	1,432
Sales and Marketing	11,019	Communications and Media	1,410
Psychology	10,077	Personnel and Human Resources	1,334
Building and Construction	9,736	Telecommunications	931
Mechanical	9,168	Physics	888
Medicine and Dentistry	9,030	Food Production	820
Mathematics	8,777	Chemistry	678
Computers and Electronics	5,655	Fine Arts	306
Engineering and Technology	4,847	Philosophy and Theology	190
Production and Processing	4,531	Geography	156
Law and Government	3,843	Foreign Language	105
Economics and Accounting	3,575	History and Archeology	74
Public Safety and Security	3,575		

Source: S.C. Dept. of Employment and Workforce, Occupational Projections Program, 2016-2026

The top job knowledge categories for the state are:

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

Similar to the top job skills, the top knowledge areas 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 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 private postsecondary institutions to projected annual job openings that require education beyond high school. This analysis uses data from the Institute of Education Sciences, Integrated Postsecondary Education Data System (IPEDS) 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, 2016-2026, which shows the annual openings over the 10-year projection 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. The job openings data details the expected annual job openings 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 one of 16 education-based career clusters.

A note to consider when examining the BLS assignment of the typical educational requirements for entry into an occupation is that it does not include all paths of entry. Many positions require higher levels of education than the level stated by BLS. In addition, changing entry requirements for some occupations may lead to higher educated individuals entering jobs than those who already hold a similar position.

The IPEDS program completer database covers the year 2016 and includes the Classification of Instructional Programs (CIP) code, the type of completed award, the institution type and number of graduates. Each CIP code is matched to one of 16 career clusters for comparison to the job openings data.

The IPEDS databases were summarized by career cluster and award type. 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 19, 20, and 21** present tables highlighting the entire analysis.

Figure 19

2016 Program Completers (Labor Supply)

Career Cluster	Less Than 4 Years	Bachelor's degree	Master's degree	Doctoral or professional degree	Total
Agriculture, Food & Natural Resources	235	378	40	22	675
Architecture & Construction	974	169	57	5	1,205
Arts, Audio/Video Technology & Communications	237	2,267	148	30	2,682
Business Management & Administration	1,662	3,650	1,236	10	6,558
Education & Training	4,908	4,498	1,917	138	11,461
Finance	424	1,502	166	-	2,092
Government & Public Administration	10	872	91	8	981
Health Science	6,517	2,239	755	946	10,457
Hospitality & Tourism	431	489	26	16	962
Human Services	2,239	2,143	686	57	5,125
Information Technology	912	743	119	17	1,791
Law, Public Safety, Corrections & Security	666	776	60	336	1,838
Manufacturing	2,214	21	-	-	2,235
Marketing	180	1,288	23	-	1,491
Science, Technology, Engineering & Mathematics	88	6,093	883	307	7,371
Transportation, Distribution & Logistics	999	16	11	-	1,026
Grand Total	22,696	27,144	6,218	1,892	57,950

Source: Institute of Education Sciences (IES), Integrated Postsecondary Education Data System (IPEDS)

Figure 20

Projected Annual Job Openings (Labor Demand)

Career Cluster	Less Than 4 Years	Bachelor's degree	Master's degree	Doctoral or professional degree	Total
Agriculture, Food & Natural Resources	124	274			398
Architecture & Construction	914	1,561			2,475
Arts, Audio/Video Technology & Communications	640	982			1,622
Business Management & Administration	2,850	8,624			11,474
Education & Training	2,524	6,759	1,705	1,559	12,547
Finance	12	3,710			3,722
Government & Public Administration	-	767	38		805
Health Science	8,080	4,112	625	1,162	13,979
Hospitality & Tourism	64				64
Human Services	1,584	1,447	895	124	4,050
Information Technology	985	2,178			3,163
Law, Public Safety, Corrections & Security	1,647	72		470	2,189
Manufacturing	1,421	289			1,710
Marketing	-	2,790			2,790
Science, Technology, Engineering & Mathematics	25	2,308	103	22	2,458
Transportation, Distribution & Logistics	5,305	384			5,689
Grand Total	26,175	36,257	3,366	3,337	69,135

Source: U.S. Bureau of Labor Statistics (BLS), SCDEW, Occupational Employment Projections Program, 2016-2026

Figure 21

Labor Supply Demand Gap

Career Cluster	Less Than 4 Years	Bachelor's degree	Master's degree	Doctoral or professional degree	Total
Agriculture, Food & Natural Resources	111	104	40	22	277
Architecture & Construction	60	-1,392	57	5	-1,270
Arts, Audio/Video Technology & Communications	-403	1,285	148	30	1,060
Business Management & Administration	-1,188	-4,974	1,236	10	-4,916
Education & Training	2,384	-2,261	212	-1,421	-1,086
Finance	412	-2,208	166	0	-1,630
Government & Public Administration	10	105	53	8	176
Health Science	-1,563	-1,873	130	-216	-3,522
Hospitality & Tourism	367	489	26	16	898
Human Services	655	696	-209	-67	1,075
Information Technology	-73	-1,435	119	17	-1,372
Law, Public Safety, Corrections & Security	-981	704	60	-134	-351
Manufacturing	793	-268	0	0	525
Marketing	180	-1,502	23	0	-1,299
Science, Technology, Engineering & Mathematics	63	3,785	780	285	4,913
Transportation, Distribution & Logistics	-4,306	-368	11	0	-4,663
Grand Total	-3,479	-9,113	2,852	-1,445	-11,185

Source: BLS, IES, SCDEW

Several observations can be made concerning the results. A primary observation is that the BLS change in separations methodology in projecting annual job openings resulted in a roughly four-fold increase in labor demand from the previous set of statewide employment projections. Significantly, the labor oversupply found in earlier gap analyses has become a labor shortage in this analysis. There are over 11,000 more projected job openings than graduates for the year. Only for occupations requiring a Master’s degree is there enough of a supply of graduates. Nine of the 16 career clusters have a supply gap. Of the 64 overall career cluster/education level combinations, there is a gap of candidates to fill the projected openings in 20 of them. A few notable findings are:

- In Business Management and Administration, there is a severe labor supply shortage at the Bachelor’s degree and lower but an overage at the Master’s degree level. Perhaps, graduates are training to be in a more favorable employment situation.
- In Education and Training, there is an oversupply at the less than four-year level and a shortage at the bachelor’s degree level to roughly the same magnitude. Students are taking general or multidiscipline studies below the Bachelor’s degree level, while a myriad of positions have openings at the next level, including teachers. There are numerous openings for postsecondary teachers at the doctorate level as well.
- In Finance, there are over 2,200 more openings than graduates at the Bachelor’s degree level.
- In Health Science, there is a labor shortage at the lower half of the educational spectrum. Most of the openings below the Bachelor’s degree level are for assistants and technicians, while three-fourths of the openings for Bachelor’s degree are for registered nurses.
- In Transportation, Distribution, and Logistics, there is a severe shortage below the Bachelor’s degree level with 70 percent of the openings being for heavy and tractor-trailer truck drivers.

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, such as those who are unemployed or not in the labor force with the credentials to qualify for a particular position. 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 272,862 people, or 5.5 percent of the state’s population in 2016. While the median age of the state’s population is 39.1 years, the median age for Hispanics in South Carolina is 25.9 years.

Native Americans

The 2016 U.S. Census American Community Survey (ACS) shows that there were 14,883 single-race American Indians/Alaskan Natives in South Carolina, up from 14,171 in 2012. 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 rate of 16.9 percent below the poverty level, compared to the overall population rate below the poverty level of 15.3 percent. Native Americans had lower percentages for those with a high school diploma or GED (81.2 percent for Native Americans vs. 86.6 percent for population aged 25 and older) and for those with a Bachelor’s Degree or higher (14.5 percent vs. 27.2 percent) than the overall population.

Homeless

South Carolina’s homeless population was estimated at 3,916 people in 2017, including 480 veterans, according to the U.S. Interagency Council on Homelessness. The total has fallen by 22.5 percent from a year ago and by 40.2 percent since 2013. The state’s homeless rate per 100,000 people is 79, while the national rate per 10,000 population is 17. People less than 25 years old made up 173 of the total who were homeless in 2017.

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 2016 American Community Survey, South Carolina had 368,000 civilian veterans aged 18 or older, making up 9.6 percent of the state's civilian adult population. Veterans had a higher percentage having some college education or an associate's degree compared to the population aged 25 and older as a whole (38.9 percent for veterans, 30.3 percent for all) as well as a higher percentage holding a Bachelor's degree or higher (28.2 percent for veterans, 27.2 percent for all). Veterans had a lower unemployment rate at 5.6 percent than the civilian population aged 18 to 64 (6.2 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 May 15, 2018, South Carolina had an inmate population of 19,619. For the Fiscal Year (FY) 2017 (July 1, 2016 – June 30, 2017), 9,305 inmates were released. The average age of an inmate was 38 years old. African-Americans made up 61 percent of the total with whites at 37 percent and other races with 3 percent. The average sentence length is 14.4 years.

Half of inmates do not have a high school diploma or GED upon incarceration. 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.

The S.C. Department of Corrections exceeded its academic goal of 5,854 inmates reaching achievements in Fiscal Year 2016-17 with 5,981 individuals, including: GED/High School Diplomas Earned, Vocational Certificates Earned, On-the-Job Training Certificates Earned and Employability Skills Curriculum Successes. The S.C. Department of Corrections has been authorized as a Department of Labor (DOL) Apprenticeship site, awarding 30 DOL apprenticeship credentials in FY 2017, up from six the previous year.

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 Fiscal Year 2017, the S.C. Department of Juvenile Justice (DJJ) handled 13,591 new cases, down from 15,429 in 2016. In these cases, 3,375 were put on probation, and a total of 2,045 youths were admitted to DJJ's detention center. The top five offenses putting a person into DJJ custody are assault and battery, shoplifting, public disorderly conduct, simple marijuana possession and disturbing school.

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 2016 ACS estimates that 123,874 South Carolina residents speak English less than "very well". Of those, 99,916 people are of foreign-born status having Limited English Proficiency (LEP). Noncitizens (79,393) were more likely to have LEP than citizens (foreign-born but naturalized) (20,523). There were 23,958 native-born citizens having LEP.

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 nationally read proficiently. 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, 68 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 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 2017, there were 4,126 children receiving in-home foster care services, up from 4,030 in the previous program year. The average time a child spent in foster care was 13.4 months in Fiscal Year 2017, 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 Program Year 2017, 236 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 postsecondary funding equaled 246, and 265 foster care participants received employment assistance (certification, child care, travel assistance and interim housing).

Temporary Assistance for Needy Families (TANF)

In August 2017, the number of residents in the state receiving TANF benefits was 22,548, the lowest level since before 2007. Youth, 18 years and younger, accounted for 79 percent of all recipients. The average monthly grant amount to a TANF recipient employed through a S. C. Department of Social Services program was \$207. 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 the American Community Survey in 2016 show that 15.2 percent of the state's civilian noninstitutionalized population was disabled. The disabled labor force equaled more than 146,000 people aged 18 to 64. Nearly 17,000 of those people were unemployed, yielding a disabled unemployment rate of 11.4 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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