

The Status of Jobs in Spartanburg County

An Evaluation of Goal 6 of 10

spartanburg 
community indicators
 project

Inspiring dialogue, strategy and change.

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An Evaluation of Goal 6 of 10

Spartanburg Community Indicators Project

A collaboration of:

**The Spartanburg County Foundation
United Way of the Piedmont
Spartanburg County Government
The University of South Carolina Upstate**

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Metropolitan Studies Institute at The University of South Carolina Upstate, © 2008**

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Strategic Spartanburg Goals

- Goal 1:** Our children will excel academically through the provision of quality education.
- Goal 2:** Our citizens will obtain the degrees and training to equip them to compete in a knowledge-based workforce.
- Goal 3:** Our senior population will be able to live independently in so far as possible with necessary support from their communities.
- Goal 4:** Our families will be stable and nurturing.
- Goal 5:** Our citizens will be healthy.
- Goal 6:** Our citizens will have access to living wage jobs.
- Goal 7:** Our communities will be viable.
- Goal 8:** Our communities will be increasingly safe.
- Goal 9:** Our citizens will have opportunities for civic engagement that promotes well-being and higher quality of life.
- Goal 10:** Our citizens will manage our natural resources in a way that will support current and future generations.

The University of South Carolina Upstate

The University of South Carolina Upstate defines itself as a “metropolitan university.” It is a member of the international Coalition of Urban and Metropolitan Universities; and, similar to the missions of its fellow members, The University of South Carolina Upstate regards its relationship to Spartanburg and Greenville and to the Upstate’s I-85 corridor communities as of fundamental importance to its purposes and future. Our recent establishment of “The Metropolitan Studies Institute” as a regional research enterprise is a direct expression of that relationship.

As one of the fastest growing universities in South Carolina over the past 10 years reflecting the growth of the Upstate, and enrolling the second largest number of South Carolina students among the State’s 10 comprehensive universities, The University of South Carolina Upstate aims to be regarded as one of the leading metropolitan universities in the Southeast.

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The Metropolitan Studies Institute at The University of South Carolina Upstate

The mission of The University of South Carolina Upstate’s Metropolitan Studies Institute (MSI) is to support research efforts between The University of South Carolina Upstate and the community, enhancing relationships, promoting the reciprocal flow of information and ideas, assisting community and economic development, and increasing the strategic use of the University’s scholarship and outreach capabilities. The MSI engages in selected community-based research and assessment projects, notable among them the Spartanburg Community Indicators Project, and partners with community agencies to undertake program evaluations, needs assessments, feasibility studies, and data management projects.

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A Letter to the Community

As collaborators of the Spartanburg Community Indicators Project; The Spartanburg County Foundation, United Way of the Piedmont, Spartanburg County Government, and The University of South Carolina Upstate are pleased to provide you with an in-depth assessment of Community Indicator Goal 6. Produced by the Metropolitan Studies Institute of The University of South Carolina Upstate, this document builds upon previous Community Indicator reports by providing a quantitative, comprehensive examination of Indicator Goal 6: "Our citizens will have access to living wage jobs."

The information contained in this report is informed by the many subject matter experts in our community who influence the achievement of the goal. Please take the opportunity to review this information and consider its observations relative to the status of jobs for the citizens of our County. In the coming months, community discussions focused on the findings of this report will be initiated. At these meetings you will be asked to not only contribute your commentary but also to help engage the appropriate action in response to the data and discussion.

This report could not have been accomplished without support from all of the community partners, funders, and experts in our community who commit the time and effort to advance understanding of the issues that affect our County. We would also like to thank Dr. Kathleen Brady at the Metropolitan Studies Institute of The University of South Carolina Upstate for her work to produce this report. This document represents more than just data. It represents a fundamental advancement in our Community Indicator effort. Valid, objective data underpinning discussion of issues in our community profits us all. A report for each Indicator goal will be produced by the MSI so that our community remains fully informed of the measures that reflect upon our progress. These reports are provided for the community in an effort to inspire dialogue, strategy and change.

Sincerely,



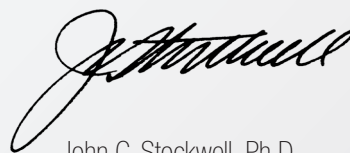
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Executive Summary

In 2005, The Spartanburg County Foundation and the United Way of the Piedmont released Community Indicators VI: Strategic Spartanburg. The sixth edition was a culmination of many hours of discussion and research, which has resulted in a community-wide project focused on the quality of life for all citizens in our community. Transitioning the data collection and assessment component of the Community Indicators Project to the Metropolitan Studies Institute has allowed for a more comprehensive assessment of the status of each goal, via examination of a wider variety of indicators.

Originally, the Community Indicators Project identified seven indicators relative to Goal 6, "Our citizens will have the economic means to steadily improve their standard of living." In the current iteration, indicators for Goal 6 have been added and broadened to provide a more comprehensive evaluation of the status of jobs in Spartanburg County and now include eight indicators. Indicators have been included or excluded based on their assessed strength, accessibility, or validity of the information they provide. Each of these indicators is thought by subject matter experts from economic development, labor and other organizations and agencies whose missions are driven by these indicators, to be a useful and valid reflection of Goal 6, providing assessment of jobs in Spartanburg County in as comprehensive fashion as possible. This report is the first in the Economy cluster of the Community Indicators goals for 2008.

For comparison purposes, data from communities with similar population demographics are supplied where possible. Data were obtained from Greenville County, Richland County, and Charleston County in South Carolina. Regional data, South Carolina state data and national data are provided where possible and as appropriate. Other metrics are used variously in this report as appropriate for the Spartanburg Metropolitan Statistical Area, the Appalachian Council of Governments (ACOG) region (Anderson, Cherokee, Greenville, Oconee, Pickens and Spartanburg Counties), and the Upstate (the ACOG counties plus Abbeville, Greenwood, Laurens, and Union Counties). Much of the data reported via the S.C. Department of Commerce is from 2007 and much of the U.S. Census data is from 2006. These are the most recent data.

The economic development goals for a community include strong job growth, high per capita income and high quality of life. Key to the realization of these goals is a well-educated labor force, a sufficient pool of knowledge workers, and an environment that supports innovative activity and capacity.

Because low wage and manufacturing jobs are increasingly moving overseas, Spartanburg County and the Upstate region have been forced into competition for "new economy" jobs. These jobs are largely knowledge-based, relying on increased skill levels. Results of indicator analyses demonstrate that, at this point, Spartanburg County does not have the educated workforce to engender and sustain competitiveness.

Several economic base industries have been identified for Spartanburg County – industries that stimulate the development of the non-base sector and propel the local tax base. All major industry sectors in Spartanburg County have demonstrated wage growth over the past five years, but at a slower rate than the state. The average weekly wage, however, is higher in Spartanburg County than the state average. For the last six years, Spartanburg County has had a higher annual unemployment rate than Greenville County, the Upstate region, the state or the nation.

Computer and mathematical science occupations are expected to grow faster in Spartanburg County than growth statewide, although all other primary occupational areas are expected to grow slower than the state average. Sixty well-paying jobs have been identified for Spartanburg County, half of which require postsecondary training. Well-paying jobs are expected to increase in Spartanburg County by approximately 3,200 by 2016. Upstate colleges and universities are not awarding the number of degrees to meet projected demands in high-growth, well-paying occupations; including science, mathematics, computer occupations, engineering, healthcare / healthcare support and education.

The relationship between low educational attainment and low socioeconomic status is borne out in Spartanburg County where demographics indicate that the county has the lowest percentage of high school and college graduates, as well as the lowest per capita and household median income among peer counties. Graduates of Spartanburg postsecondary institutions tend to leave the County and there is low in-migration to the County, presumptively secondary to lack of high wage employment opportunity. Even though Spartanburg high school students are now graduating at higher rates, they do not continue to postsecondary institutions. Therefore, it follows that Spartanburg County does not have a ready work force to entice high wage employers, nor does the county have available jobs to entice individuals seeking high wage employment. The data indicate that Spartanburg County lacks a sufficient labor base with skills for 21st Century jobs.

Strengths and Challenges

Upon examination of the data for each indicator and other data relevant to the status of jobs in Spartanburg County, there are a number of positive findings. Primary among these are:

- Compared to peer counties, Spartanburg County has the lowest required gross annual income (living wage)
- Spartanburg average wages were higher than the state average for 13 occupational groups
- Statewide growth in jobs is projected across most skill levels through 2016
- There are three notable economic base industries in Spartanburg County that met all six criteria for designation as a “six star” sector
- Service-providing occupations are increasing in Spartanburg County

Assessment of the indicators also results in a number of negative findings. These are:

- Per capita income growth in Spartanburg County has been slower than those of the state and the nation
- Spartanburg County has the lowest median household income and per capita income of all comparison counties, lower than the S.C. and U.S. averages
- Educationally, Spartanburg ranks lowest among all peer counties, as well as the state and nation, for high school and college completion
- Residents of peer counties have a higher standard of living / more expendable income than residents of Spartanburg County
- Spartanburg falls behind peers for percentage employed in “white collar” occupations and leads peers in percentage employed in “blue collar” occupations
- Every year for the past six years, Spartanburg County experienced a higher annual unemployment rate than Greenville County, the Upstate region, the state and the nation
- In recent years there has been a widening gap between numbers of Spartanburg residents employed and numbers in the labor force
- Unemployment increased significantly in Spartanburg County between 2000 and 2001 and has remained higher in the 2000s than in the 1990s
- Job count peaked in 2000
- Spartanburg County apparently lacks the in-migration “draw” that characterizes other peer counties
- The Spartanburg MSA ranked 295th (of 361 MSAs nationally) for labor force growth 2000-2007
- The average weekly wage rose by less in Spartanburg County than the state average between 2002 and 2007
- Spartanburg County’s average weekly wage was lower than the average in S.C. in 2007
- Only one occupational group area is projected to grow faster in Spartanburg County than in S.C. from 2007 to 2016
- Goods-producing occupations (primarily manufacturing and construction) are decreasing in Spartanburg County

Income

In 2006, S.C. ranked 42nd among the states for median family income, \$8,192 below the national median (see Table 1). The median family income for Spartanburg County was higher than the state median but lower than that of any peer county. When considering median household income, S.C. ranked at 41st place, \$7,351 lower than the national median. The median household income for Spartanburg County was lower than the state median and lower than all peer counties. Further, in 2006, 9.9% of families in Spartanburg County had incomes below the poverty level. This was slightly higher than the U.S. average of 9.8%, but lower than the S.C. average of 11.9%.

The data in Table 1 demonstrate that:

- Spartanburg County has the lowest median household income and per capita income of all comparison counties, lower in fact than the S.C. and U.S. averages
- A higher percentage of families fall below the poverty level in Greenville, Charleston, and S.C. on average
- A higher percentage of individuals fall below the poverty level in Greenville, Richland, and Charleston
- A higher percentage of individuals fall below the poverty line in both the U.S. and S.C. on average than in Spartanburg County

In terms of intervening variables, Spartanburg County also has the highest median population age of all peer counties and the state and national medians. Educationally, Spartanburg ranks lowest among all peer counties, as well as the state and nation, for high school and college completion. Spartanburg County's population has risen by 11.6% since 1997, compared to 14.2% growth for South Carolina. County population growth is projected to remain slower than the state's for the next 20 years.

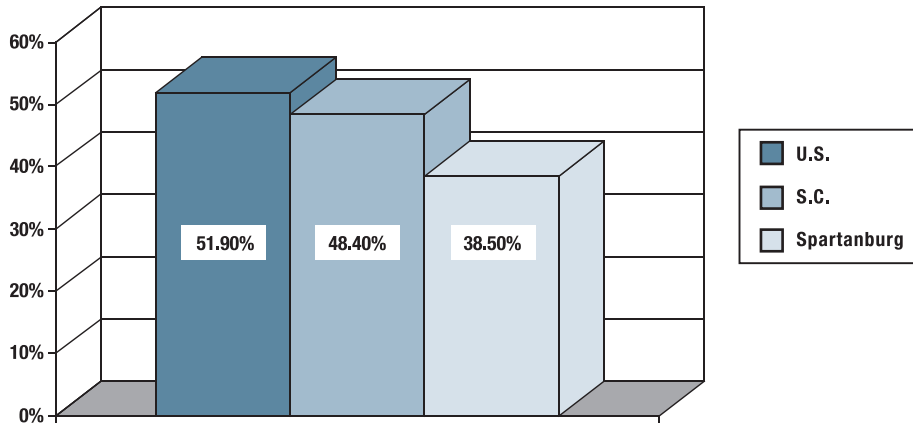
Table 1. Demographics of Comparable Cities (2006)

	Spartanburg	Greenville	Richland	Charleston	Mecklenburg	S.C.	U.S.
Average household size (persons)	2.46	2.48	2.36	2.33	2.41	2.52	2.61
% in labor force age 16+	64.8%	66.2%	68.3%	64.1%	73.9%	63.1%	65%
Median household income*	\$39,694	\$41,850	\$45,370	\$43,857	\$51,945	\$41,100	\$48,451
Median family income*	\$51,392	\$52,232	\$56,232	\$56,353	\$64,185	\$50,334	\$58,526
Per capita income*	\$21,610	\$23,926	\$23,730	\$28,551	\$30,556	\$21,875	\$25,267
Families below poverty level	9.9%	10.8%	9.8%	12.9%	8.4%	11.9%	9.8%
Individuals below poverty level	12.7%	13.6%	13.5%	18.1%	11.3%	15.7%	13.3%
Median age	37.3	36.9	34.4	36	35	36.4	36.4
White	75.7%	76.2%	48.6%	63.7%	60.1%	67.3%	73.9%
Black or African American	20.4%	18%	45.7%	31.9%	30.1%	28.6%	12.4%
Hispanic or Latino	4.5%	6.2%	3.3%	3.3%	9.8%	3.4%	14.8%

*In 2006 inflation adjusted dollars. The definitions of "family" and "household" used by the U.S. Bureau of the Census Survey are: Household: all the people who occupy a housing unit as their usual place of residence. Family: a group of two or more people who reside together and who are related by birth, marriage, or adoption.

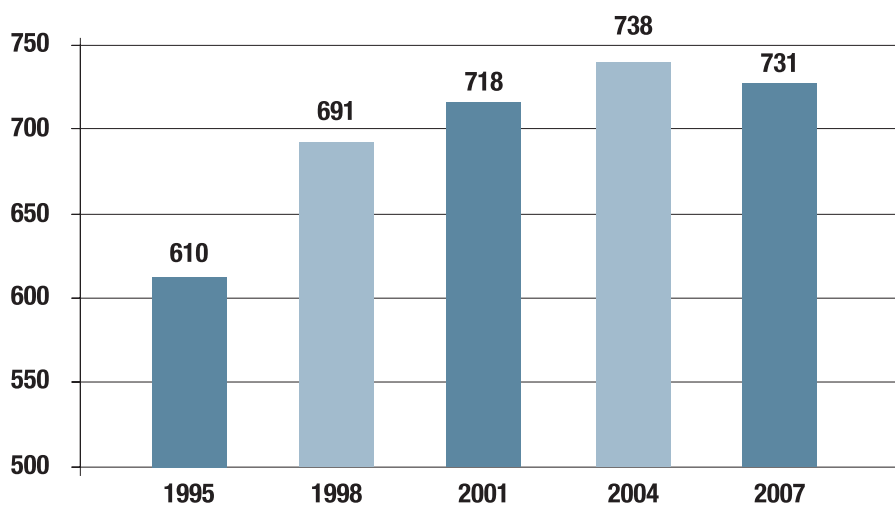
From 1996 to 2006, Spartanburg County's per capita income has grown slower than South Carolina's and the nation's (Figure 1).

Figure 1. Per Capita Income Growth, 1996-2006



From 2002 to 2007 the average weekly wage rose 15% in Spartanburg County, compared to 18% for the state. However, Spartanburg County's average weekly wages were higher than those of S.C. in 2007 (\$731 vs. \$680). Figure 2 illustrates that wages in Spartanburg County have grown since 1995; however, they have decreased since 2004.

Figure 2. Average Weekly Wage, Spartanburg County (2007 Dollars)



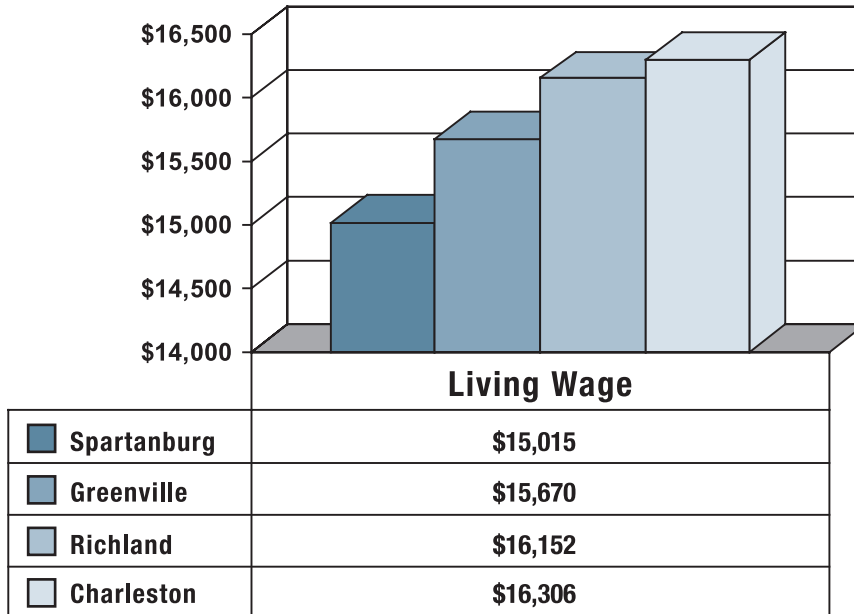
Living Wage

Living wage estimates are based on typical expenses for a geographic area that determine the wage an individual must earn to support himself or herself and dependents. For Spartanburg County, the expenses that factor into living wage and required income are indicated in Table 2.

Table 2. Living Wage Calculation for Spartanburg, October 2008					
	1 Adult	1 Adult, 1 Child	2 Adults	2 Adults, 1 Child	2 Adults, 2 Children
Monthly Expenses					
Food	\$156	\$273	\$335	\$452	\$570
Child Care	\$0	\$324	\$0	\$324	\$647
Medical	\$80	\$260	\$260	\$301	\$343
Housing	\$462	\$558	\$478	\$558	\$558
Transportation	\$136	\$136	\$136	\$136	\$136
Other	\$208	\$280	\$274	\$340	\$380
Monthly After-Tax Income Required	\$1,042	\$1,830	\$1,482	\$2,111	\$2,633
Annual After-Tax Income Required	\$12,498	\$21,962	\$17,788	\$25,326	\$31,595
Annual Taxes					
Payroll Tax	\$1,149	\$2,018	\$1,635	\$2,328	\$2,904
State Tax	\$347	\$609	\$493	\$702	\$876
Federal Tax	\$1,021	\$1,794	\$1,453	\$2,069	\$2,581
Gross Annual Income Required	\$15,015	\$26,384	\$21,369	\$30,425	\$37,956
<i>Living Wage Calculator</i>					

Compared to peer counties using the same formula, Spartanburg County has the lowest required gross annual income (living wage), as demonstrated in Figure 3.

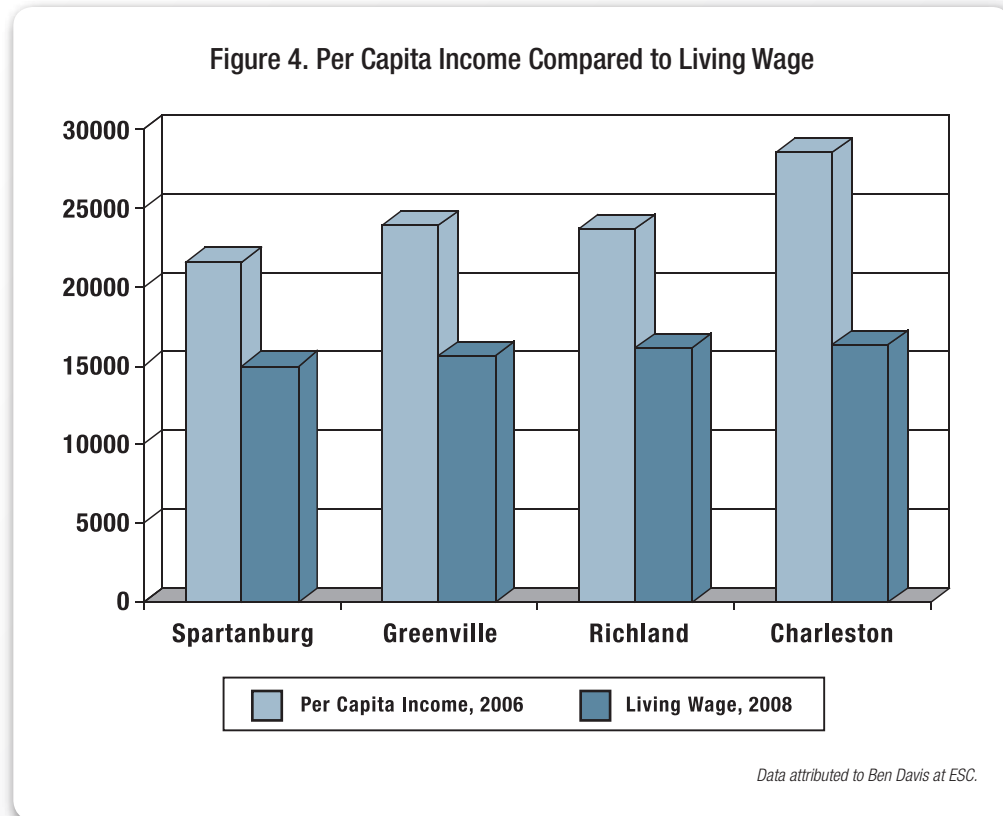
Figure 3. Gross Annual Living Wage for One Adult, 2008



Data attributed to Ben Davis at ESC.

Living Wage *(cont.)*

When living wage for one adult is matched with per capita income, it becomes clear that residents of peer counties have a higher standard of living / more expendable income than residents of Spartanburg County (Figure 4).



In each of the four counties shown in Figure 4, the per capita income is more than the living wage:

- Spartanburg County: 43.9% more
- Richland County: 46.9% more
- Greenville County: 52.6% more
- Charleston County: 75.0% more

It should be noted that living wage estimates are for 2008, while per capita income figures are from 2006, the latest data available.

In 2006:

- 23.2% of Spartanburg County workers earned \$1,200 per month or less
- 43.5% of Spartanburg County workers earned \$3,400 per month or less
- 33.3% of Spartanburg County workers earned more than \$3,400 per month

Employment by Occupational Area

Industry diversity should be great enough to minimize negative effects of cyclical downturns and changing market conditions. Strong concentrations in few industry sectors can invite local economic disaster as when one employer experiences negative job growth, all employers experience negative job growth.

According to the American Community Survey, the most common occupations in Spartanburg County (2006) are:

Management, professional and related	29%
Sales and office.....	23%
Production, transportation and material moving.....	21%
Service	15%
Construction, extraction, maintenance and repair	12%

Percentages of civilian employed population, age 16 and over, are listed in Table 3 for comparison by peer county. It is clear that Spartanburg falls behind peers for percentage employed in “white collar” occupations and leads peers in percentage employed in “blue collar” occupations.

	Spartanburg	Greenville	Richland	Charleston	S.C.	U.S.
Management, Professional & Related	29%	32%	39%	37%	30%	34%
Service	15%	14%	17%	18%	16%	17%
Sales & Office	23%	27%	28%	25%	26%	26%
Farming, Fishing & Forestry	.2%	.2%	.2%	.3%	.5%	.7%
Construction, Extraction, Maintenance & Repair	12%	10%	5%	10%	11%	9%
Production, Transportation & Material Moving	21%	16%	10%	9%	17%	13%

American Community Survey

Eighty-two percent of people employed in Spartanburg County in 2006 were private wage and salary workers, 12% were federal, state, or local government workers; and 6% were self-employed, not incorporated business workers.

Labor Force Education

As the cost of labor rises and the cost of automation falls, there has been a resulting elimination of jobs involving routine work – jobs that have been done by relatively uneducated workers. Concurrently, the U.S. is experiencing a widening education gap with heretofore “underdeveloped” countries. Among older adults ages 55 to 64, the U.S. has the highest percentage of college degree holders among all countries ranked by the Organization for Economic Cooperation and Development. However, among young adults, ages 25 to 34, the U.S. ranks eighth.

Labor force education has been identified by regional leaders as the primary driver of regional competitiveness. In fact, the Economic Development Plan for Spartanburg County (2007) proposed by the Economic Growth Council states that good jobs go to “smart communities” and that, “every recommendation in this plan is supported by a general increase in education attainment. This is a fundamental priority for economic progress.” Educated labor is adaptable labor – that is, the better educated the labor force, the more quickly the economy can take advantage of new opportunities or recover from negative downturns. Further, educated people are attracted to communities with educated residents and educated labor forces. Labor force education is represented by two primary measures: percent of labor force with a high school degree and percent of labor force with a college degree.

The data in Table 4 demonstrate that, in terms of educational attainment among peer counties, Spartanburg ranks lowest in percentage of residents over 25 years of age who are high school graduates and lowest in percentage of residents over 25 years of age who are college graduates. Almost 19% of Spartanburg residents have some college but no degree (comparable to peer counties) and 9% have associate’s degrees (higher than peer counties). Spartanburg ranks lowest in percentage of residents who have graduate or professional degrees

	Spartanburg	Greenville	Richland	Charleston	Mecklenburg	S.C.	U.S.
High School Graduates	79.3%	81.6%	87.4%	86.3%	87.8%	81.3%	84.1%
Bachelor’s Degree Holders	19.2%	27.1%	35.5%	36.1%	38.1%	22.7%	27%
Some College but no Degree	18.8%	18.6%	19.3%	17.4%	19.5%	18.1%	19.5
Associate’s Degree	9%	7.4%	7.5%	7%	8%	7.9%	7.4%
Graduate or Professional Degree	7%	8.4%	14.3%	12.1%	12.1%	7.9%	9.9%

American Community Survey

However, when data for current graduation and dropout rates are examined it becomes clear that a higher percentage of students in Spartanburg County, as compared to peer counties, are graduating high school, and a lower percentage of students are dropping out of school. This may be explained by the fact that, in recent years, low wage textile and manufacturing jobs have left the area and students may be more motivated to stay in high school and graduate in order to obtain more sustainable jobs. When low-wage jobs were plentiful in Spartanburg County the population may not have been motivated, vocationally, to degree attainment. Notably, even though Spartanburg high school students are now graduating at higher rates, they do not continue to postsecondary institutions.

Knowledge workers produce new products and processes that engender new economic activity in a community. Knowledge occupations include those in management, business/operations, finance, media, arts, design, entertainment, high-end sales, computer occupations, mathematics, sciences, engineering, architecture, education, and healthcare.

In academic year 2006-2007, Upstate colleges and universities awarded 11,932 degrees, certificates and diplomas (Table 5). Of all degrees, the greatest number of certificates and diplomas were awarded in:

- Business, management, and marketing (19% with 11% at the bachelor's level)
- Health professions (16% with 5% at the bachelor's level and 4% at the associate's level)
- Education (12% with 5% at the bachelor's level)

Table 5. Degrees Awarded at Upstate Colleges and Universities* 2006-2007

Discipline	Cert. / Diploma	Associate	Bachelor	Master	M.D. / Ph.D.	Total
Agriculture	3	14	144	33	19	213
Architecture & Related			89	44		133
Biological & Biomedical Sciences			314			314
Business, Management, Marketing	289	390	1,334	291	2	2,306
Communication, Journalism			118	13		131
Communications Technologies	2	13				15
Computer & Info Sciences	96	68	151	28	4	347
Construction Trades	23					23
Education		12	625	761	16	1,414
Engineering, Engineering Tech	40	85	415	165	53	728
English Language and Lit			268	18		286
Ethics, Cultural & Gender Studies			12			12
Family & Consumer Sciences	85	11				96
Foreign Language and Lit			116			116
Health Professions	793	521	537	32		1,883
History			178	16		194
Legal Professions & Studies		45				45
Liberal Arts & Sciences, General Studies	6	464	136			606
Mathematics & Statistics			54	23	4	81
Mechanic & Repair Technologies	480	113				593
Multi / Interdisciplinary Studies	6	113	28	7		154
Natural Resources & Conservation			42	9	4	55
Parks, Recreation, Leisure & Fitness			225	7	3	235
Personal & Culinary Services	72	9				81
Philosophy & Religious Studies			105	4		109
Physical Sciences			123	18	16	157
Precision Production	91	25				116
Psychology			345	7	1	353
Public Administration, Social Services	30	24		10	2	66
Science Technologies			28	4		32
Security & Protective Services	38	83	41			162
Social Sciences	27	12	396	26		422
Theology & Religious Vocations			16			16
Transportation & Materials Moving	119					119
Visual & Performing Arts	8		224	18		250
Total	2,208	2,002	6,064	1,534	124	11,932

*Includes Southern Wesleyan University, Clemson University, Converse College, Furman University, Lander University, North Greenville University, Spartanburg Community College, Spartanburg Methodist College, Tri-County Technical College, The University of South Carolina Upstate, Greenville Tech, and Wofford College.

Unemployment Rate

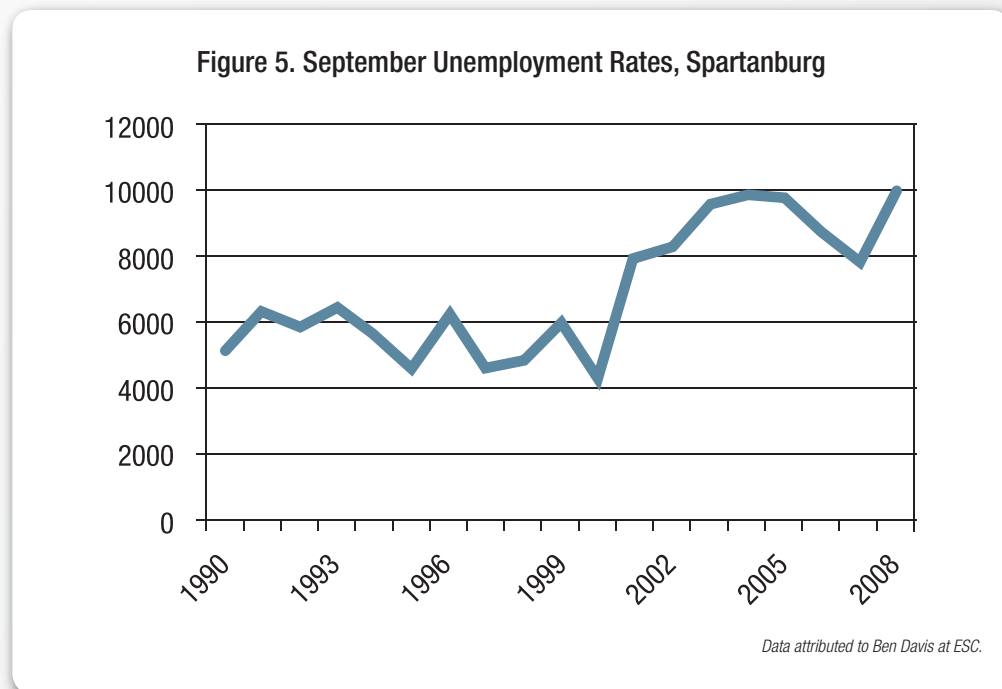
The unemployment rate in South Carolina reached a 15-year high of 7.6% in August 2008, and the number of jobs state-wide fell by 14,400 in September 2008, the largest September decrease on record. All major industry sectors lost jobs in September 2008, except education and health services and government. Construction jobs had declined for 11 consecutive months by September 2008.

The average annual unemployment rate for upstate counties, S.C., and the U.S. are reported in Table 6. Every year for the past six years, Spartanburg County experienced a higher annual unemployment rate than Greenville County, the Upstate region, the state and the nation.

Table 6. Annual Average Unemployment Rate						
	2002	2003	2004	2005	2006	2007
Spartanburg County	6.8%	7.2%	7.6%	7.7%	6.7%	6%
Greenville County	4.9%	5.4%	5.9%	5.6%	5.4%	4.9%
Upstate Region	6.4%	6.9%	7.1%	7%	6.6%	5.9%
S.C.	6%	6.7%	6.8%	6.8%	6.5%	5.9%
U.S.	5.8%	6%	5.5%	5.1%	4.6%	4.6%

ACOG

The Spartanburg County unemployment rate, measured annually in September, is illustrated in Figure 5. It is evident that unemployment increased significantly between 2000 and 2001 and has remained higher in the 2000s than in the 1990s.



From fourth quarter 2006 through third quarter 2007, there was a net job flow of 1,067 jobs in Spartanburg County (the difference between current and previous employment at each business). Table 7 provides comparison data by peer county.

Table 7. Job Flows and Related Data by Peer County, Oct. 2006 – Sept. 2007					
	Spartanburg	Greenville	Richland	Charleston	S.C.
Total Employment	125,458	250,284	220,436	199,015	1,845,863
Net Job Flows	1,067	2,160	2,206	7,479	26,049
Job Creation	6,915	14,530	11,544	18,014	123,431
New Hires	21,793	50,916	36,392	44,017	355,037
Separations	25,128	57,746	41,638	48,397	407,103
Turnover	10.7%	11.7%	10.3%	13.4%	11.7%
Average Monthly Earnings	\$3,299	\$3,297	\$3,304	\$3,210	\$3,055
Average New Hire Earnings	\$2,133	\$2,003	\$2,063	\$2,082	\$1,982

U.S. Census Bureau Local Employment Dynamics

Of peer counties currently, Spartanburg has the smallest labor force but the highest unemployment rate (Table 8).

Table 8. Unemployment and Labor Force						
	Labor Force		Unemployment		Unemployment %	
	Sept. 08	Sept. 07	Sept. 08	Sept. 07	Sept. 08	Sept. 07
Spartanburg	136,254	132,140	9,992	7,885	7.3	6
Greenville	224,482	221,375	13,512	11,173	6	5
Richland	178,039	178,654	11,987	10,145	6.7	5.7
Charleston	175,772	175,291	9,996	8,246	5.7	4.7
S.C. (*million)	2,159.2*	2,142.2*	157*	126.2*	7.3	5.9

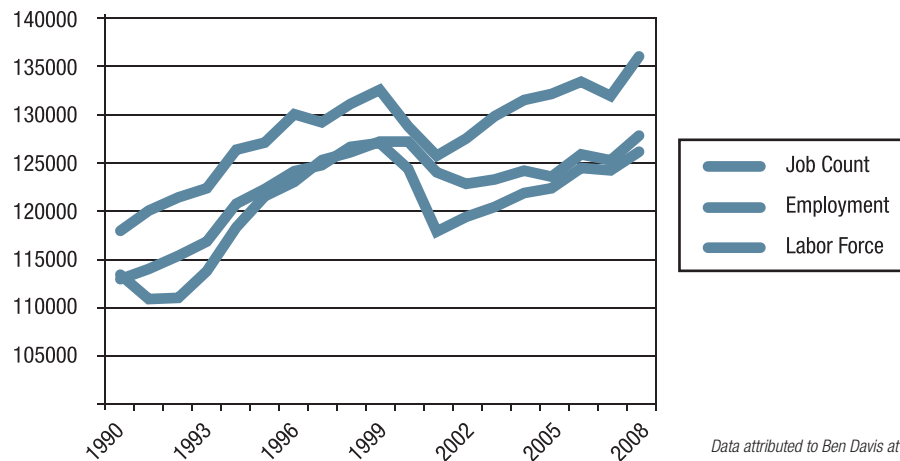
S.C. ESC

Unemployment Rate *(cont.)*

When considering trends in Spartanburg County labor force, employment and job count taken together (Figure 6), several observations emerge:

- Job count peaked in 2000, likely a result of BMW “maturing”
- The steep decline in the labor force between 1998 and 2001 coincided with significant retirement of textile workers
- The increase in the labor force between 2006 and 2008 reflects the high birth rates of the 1980s, as those children are now entering the workforce
- Recent increase in the labor force is also attributable to students, homemakers and retirees who have re-entered the workforce in the declining economy
- The steady increase in employment since 2001 is attributable, in large part, to increased numbers of dual job holders
- In recent years there has been a widening gap between employment and the labor force; this constitutes the unemployment rate

Figure 6. September Labor Force/ Employment /Job Count, Spartanburg

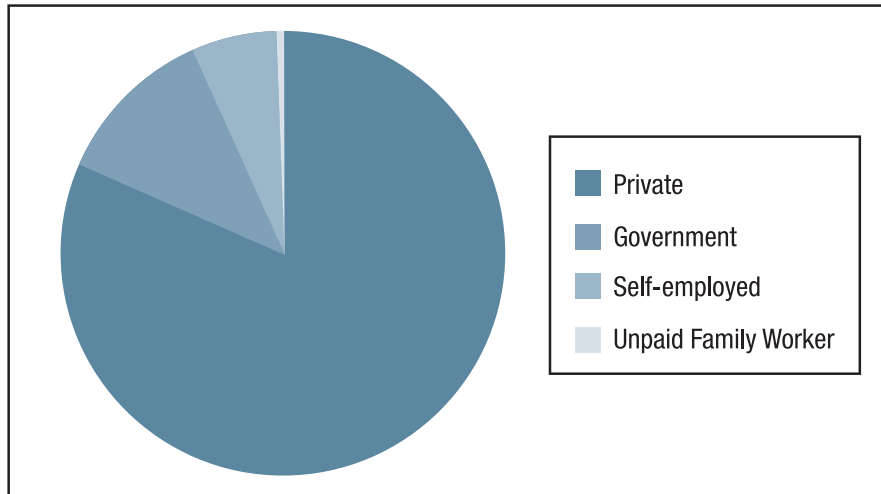


Labor Force Demographics

Labor Shed

The population of Spartanburg County, age 16 and over, was 214,039 in 2006. There were 138,703 persons in the labor force. Figure 7 demonstrates the distribution of the labor force.

Figure 7. Spartanburg County Labor Force, 2006



Of the 361 U.S. Metropolitan Statistical Areas (MSAs), the Spartanburg MSA ranked 238th for labor force growth 2000-2006.

Workforce Age

30 or younger.....	22.8%
31 to 54.....	59.6%
55 or older.....	17.6%

Labor Force Demographics *(cont.)*

Transience

Spartanburg County has an in transient population, as natives tend to remain in S.C. and fewer outside residents move into the county than into other counties. The data in Table 9 show that Spartanburg is the most in transient county among peer counties and is more in transient than the state and national average. In fact, Spartanburg County is the only peer county where in-migration falls below the U.S. and S.C. averages. Taken in combination with other data in this report, it is reasonable to conclude that Spartanburg County lacks the in-migration “draw” that characterizes other peer counties, as it does not have a ready work force to entice high wage employers, nor does it have available jobs to entice individuals seeking high wage employment.

Table 9. Transience, 2006

	% Native Population Born in State of Residence	% 1 Year and Older Who Lived in a Different State 1 Year Ago
Spartanburg	67.32%	26.79%
Greenville	55.59%	39.81%
Richland	59.16%	34.35%
Charleston	54.51%	39.81%
S.C.	60.79%	34.26%
U.S.	58.94%	31.10%

American Community Survey

Commuting Patterns

Over 62% of Spartanburg County workers in 2006 lived within the county; however, 12.3% lived in Greenville County and 2.5% lived in North Carolina. Only 9.5% of county workers lived in the City of Spartanburg.

Interestingly, while 12.3% of Spartanburg County workers live in Greenville County, only 8% of Greenville County workers live in Spartanburg County.

In 2006, 85% of Spartanburg County workers drove to work alone, 10% carpoled, less than 0.5% took public transportation, and 3% used other means. The remaining 2% worked at home. Of Spartanburg workers who commuted to work in 2006, it took them an average of 21.5 minutes.

Employment by Sector

Of the 2006 civilian employed population in Spartanburg County, 16 years and older, Table 10 demonstrates the breakdown by occupation.

Table 10. Spartanburg County Workers by Occupation	
Occupation	Estimate
Management, Professional and Related Occupations	36,597
Service Occupations	19,563
Sales & Office Occupations	29,091
Farming, Fishing, & Forestry Occupations	215
Construction, Extraction, Maintenance, & Repair Occupations	14,805
Production, Transportation, & Material Moving Occupations	27,159
<i>American Community Survey</i>	

Table 11 demonstrates the breakdown by industry.

Table 11. Spartanburg County Workers by Industry	
Industry	Estimate
Agriculture, Forestry, Fishing & Hunting, & Mining	598
Construction	11,528
Manufacturing	27,497
Wholesale Trade	5,799
Retail Trade	14,581
Transportation & Warehousing, & Utilities	5,243
Information	2,304
Finance & Insurance, & Real Estate, Rental, & Leasing	5,765
Professional, Scientific & Management, & Administrative & Waste Management Services	10,258
Educational Services, Health Care, & Social Assistance	22,402
Arts, Entertainment & Recreation, Accommodation & Food Services	11,157
Other services, except public administration	7,172
Public Administration	3,099
<i>American Community Survey</i>	

Employment by Sector *(cont.)*

When compared to the state and the nation, Spartanburg County has higher percentages of businesses in the following sectors:

- Retail trade
- Accommodation and food services
- Manufacturing
- Finance and insurance
- Transportation and warehousing

Spartanburg falls significantly below both the state and the nation in percentage of professional, scientific and technical services industries, although some of these industries are growing faster in Spartanburg County than statewide or nationally.

At the North American Industry Classification system (NAICS) level, Spartanburg County had higher growth in eight industries compared to S.C. and the U.S. (Table 12).

Table 12. Spartanburg County Industries Exceeding State and U.S. Growth 2002-2007

Industry	Spartanburg	S.C.	U.S.
Support activities for Agriculture & Forestry	11.1%	-13%	1.8%
Heavy & Civil Engineering Construction	8.7%	-2%	-2.3%
Primary Metal Manufacturing	55.6%	1%	-5.4%
Transportation Equipment Manufacturing	26.9%	4.9%	-1.1%
Health & Personal Care Stores	11%	9.1%	10.2%
Telecommunications	31.3%	0%	9.3%
Data Processing, Hosting & Related Services	14.3%	-11%	-47.5%
Accommodation	4.3%	-3.4%	3.5%

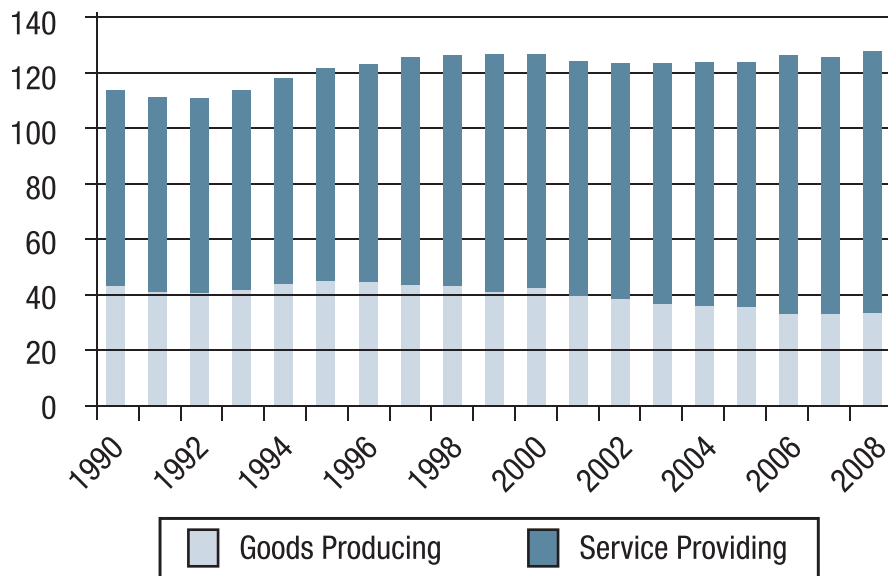
S.C. Department of Commerce.

When compared to the state and the nation, Spartanburg County has higher percentages of jobs in the following sectors:

- Manufacturing
- Trade, transportation and utilities

When considered longitudinally by percentage of occupations (Figure 8), goods-producing occupations (primarily manufacturing and construction) are decreasing in Spartanburg County and service-providing occupations are increasing

Figure 8. Goods Producing vs. Service Providing Occupations, Spartanburg County



Data attributed to Ben Davis at ESC.

Wages by Sector

From 2002 to 2007, the average weekly wage rose 17% in Spartanburg County, compared to 18% for the state. Further, Spartanburg County's average weekly wage was lower than that of the average in S.C. in 2007 (\$663 vs. \$680). All major sectors evidenced growth in Spartanburg County, led by real estate, rental and leasing at 42% (Table 13).

Table 13. Wages by Industry, Spartanburg County

Industry	2002 Average Weekly Wage (\$)	2007 Average Weekly Wage (\$)	% Change
Construction	630	755	20%
Manufacturing	821	953	16%
Retail Trade	431	456	6%
Transportation & Warehousing	612	637	4%
Information	638	763	20%
Finance & Insurance	864	978	13%
Real Estate, Rental, & Leasing	520	737	42%
Administration, Support, Waste Management, & Remediation Services	351	405	15%
Arts, Entertainment, & Recreation	279	384	38%
Accommodation & Food Services	220	240	9%
Other Services (except Public Administration)	415	476	15%
Federal Government	810	974	20%
State Government	605	666	10%
Local Government	664	788	19%
Total, Private & Government	636	731	15%

S.C. Department of Commerce

Specifically, Spartanburg average wages were higher than the state average for 13 of the occupational groups listed in Table 14.

Table 14. Median Hourly Wages by Occupational Group, 2007		
Occupational Areas	Spartanburg County	S.C.
Management	\$37.78	\$28.78
Business & Financial Operations	\$20.99	\$20.28
Computer & Mathematical Science	\$25.57	\$26.20
Architecture & Engineering	\$34.01	\$30.22
Life, Physical & Social Science	\$26.24	\$22.76
Community & Social Services	\$12.58	\$13.18
Legal	\$29.97	\$30.68
Education, Training, & Library	\$24.15	\$24.42
Arts, Design, Entertainment, Sports, & Media	\$13.21	\$12.66
Healthcare Practitioners & Technical	\$33.70	\$30.64
Healthcare Support	\$11.18	\$10.55
Protective Service	\$13.88	\$13.87
Food Preparation & Serving	\$7.88	\$7.90
Building & Grounds Cleaning & Maintenance	\$8.31	\$8.42
Personal Care & Service	\$9.09	\$8.39
Sales & Related	\$15.54	\$13.48
Office & Administrative Support	\$13.13	\$13.22
Farming, Fishing, & Forestry	\$12.70	\$13.07
Construction & Extraction	\$15.94	\$16.51
Installation, Maintenance, & Repair	\$17.46	\$16.88
Production	\$17.99	\$15.21
Transportation & Material Moving	\$13.72	\$12.94

S.C. Department of Commerce

Wages by Sector *(cont.)*

The specific jobs listed in Table 15 are considered "well-paying" since they pay at or above \$18 per hour in Spartanburg County. Of these 60 jobs, approximately half require postsecondary training. By 2016, well-paying jobs requiring postsecondary training are projected to increase by approximately 1,500, and well-paying jobs requiring no postsecondary training are projected to increase by approximately 1,900.

Table 15. Well-Paying* Jobs With Significant Concentration in Spartanburg County**

	Required Education	# Jobs		Median Hourly Earnings, 2007
		2007	2016	
Sales Manager	Degree	450	517	\$41.51
Administrative Services Manager	Degree	484	579	\$27.52
Training & Development Manager	Degree	67	93	\$36.55
Industrial Production Manager	Experience	248	279	\$34.83
Engineering Manager	Degree	261	289	\$43.59
Funeral Director	Associate's Degree	42	40	\$33.18
Postmaster & Mail Superintendent	Experience	34	34	\$37.98
General & Operations Manager	Degree	2150	2255	\$33.97
Surveyor	Bachelor's Degree	102	116	\$18.33
Chemical Engineer	Bachelor's Degree	93	80	\$39.70
Electrical Engineer	Bachelor's Degree	281	307	\$36.48
Health & Safety Engineer	Bachelor's Degree	89	90	\$50.95
Industrial Engineer	Bachelor's Degree	826	1165	\$34.92
Materials Engineer	Bachelor's Degree	79	89	\$44.63
Mechanical Engineer	Bachelor's Degree	410	413	\$43.81
Nuclear Engineer	Bachelor's Degree	100	117	\$66.56
Electrical & Electronics Drafter	Postsecondary Vocational Award	45	46	\$33.94
Mechanical Drafter	Postsecondary Vocational Award	97	99	\$19.74
Electrical & Electronic Engineering Technician	Associate's Degree	240	252	\$23.13
Industrial Engineering Technician	Associate's Degree	160	187	\$29.03
Mechanical Engineering Technician	Associate's Degree	114	114	\$28.19
Engineering Technician, all other	Associate's Degree	130	156	\$18.73
Forester	Bachelor's Degree	20	22	\$31.61
Chemical Technician	Associate's Degree	371	317	\$19.68
Nuclear Technician	Associate's Degree	24	29	\$36.59
Middle School Teacher	Bachelor's Degree	1027	1081	\$28.30
Vocational Education Teacher - Secondary School	Degree	142	130	\$29.21
Special Education Teacher - Middle School	Bachelor's Degree	155	170	\$29.40
Chiropractor	Professional Degree	77	88	\$31.79
Registered Nurse	Associate's Degree	2769	3417	\$34.50
Respiratory Therapy Technician	Associate's Degree	32	32	\$21.72
Surgical Technologist	Postsecondary Vocational Award	110	136	\$22.31
Orthotists & Prosthetists	Bachelor's Degree	14	17	\$29.00

* Greater than \$18 per hour
 ** Location quotient (% of employment in the sector in the county divided by % of employment in that sector in the U.S.) at least 1.25

Table 15 (cont.). Well-Paying* Jobs With Significant Concentration in Spartanburg County**

	Required Education	# Jobs		Median Hourly Earnings, 2007
		2007	2016	
Production, Planning & Expediting Clerk	On-the-job training	355	402	\$18.19
First Line Supervisor / Manager of Mechanics, Installers & Repairs	Experience	526	581	\$23.73
Control Valve Installer & Repairer	On-the-job training	47	54	\$28.01
Industrial Machinery Mechanic	On-the-job training	811	969	\$20.26
Maintenance Workers, Machinery	On-the-job training	237	255	\$21.77
Electrical Power-line Installer & Repairer	On-the-job training	130	133	\$24.82
First Line Supervisor / Manager of Production & Operating Workers	Experience	1333	1459	\$31.67
Coil Winders, Tapers & Finishers	On-the-job training	31	25	\$24.51
Engine & other Machine Assemblers	On-the-job training	160	125	\$21.51
Fiberglass Laminators & Fabricators	On-the-job training	123	152	\$45.35
Team Assemblers	On-the-job training	5077	6089	\$20.81
Numerical Tool & Process Control Programmer	On-the-job training	23	24	\$20.75
Drilling & Boring Machine Tool Setter, Operator, & Tender	On-the-job training	70	66	\$19.31
Lathe & Turning Machine Tool Setter, Operator, & Tender	On-the-job training	91	83	\$19.18
Milling & Planning Machine Setter, Operator, & Tender	On-the-job training	52	49	\$24.60
Machinist	On-the-job training	983	996	\$21.52
Metal-Refining Furnace Operator & Tender	On-the-job training	22	22	\$18.32
Model Maker	On-the-job training	10	11	\$24.30
Tool & Die Maker	On-the-job training	228	247	\$20.22
Sewing Machine Operator	On-the-job training	339	387	\$27.30
Power Plant Operator	On-the-job training	112	130	\$28.91
Stationary Engineer & Boiler Operator	On-the-job training	51	57	\$20.28
Water & Liquid Waste Treatment Plant & System Operator	On-the-job training	135	149	\$19.16
Gas Plant Operator	On-the-job training	15	18	\$24.92
First Line Supervisor / Manager of Helpers, Laborers & Material Movers	Experience	303	361	\$19.94
Truck Driver, Heavy & Tractor Trailer	On-the-job training	2361	2625	\$18.36
Locomotive Engineer & Operator	On-the-job training	44	43	\$26.53
Crane & Tower Operator	On-the-job training	62	72	\$21.08

* Greater than \$18 per hour

** Location quotient (% of employment in the sector in the county divided by % of employment in that sector in the U.S.) at least 1.25

Employment Growth Projections

Of 361 U.S. Metropolitan Statistical Areas (MSAs), Spartanburg MSA ranked 295th for average annual employment growth 2000-2007.

In 2007, the S.C. Department of Commerce was involved in recruiting 15,666 jobs and \$4.45 billion in capital investment to the state. Three of every five of these jobs were in the manufacturing sector and 34% of these jobs were located in counties without urban centers. Foreign investment accounted for 31% of all jobs recruited.

Jobs and capital investment by sector for 2007 recruitment include:

- Automotive – 3,066 jobs and \$1.69 billion in capital investment
- Plastics – 965 jobs and \$342.9 million in capital investment
- Chemicals – 616 jobs and \$917.8 million in capital investment
- Distribution / Logistics – 2,159 jobs and \$274.3 million in capital investment
- Metal fabrication – 1,879 jobs and \$236.4 in capital investment

Table 16 reports comparative data for announced job creation and capital investments in manufacturing, distribution and corporate headquarters for the past three years.

	2005		2006		2007	
	Jobs	Cap. Inv.	Jobs	Cap. Inv.	Jobs	Cap. Inv.
Spartanburg	480	129,500	1,755	100,710	1,909	364,200
Greenville	1,073	158,200	1,926	298,580	683	183,250
ACOG	2,361	456,800	6,436	4,552,690	3,949	720,650
Upstate	3,211	821,900	7,204	4,685,890	4,629	836,650
S.C.	12,370	2,660,000	14,420	2,990,000	15,666	4,045,047
<i>ACOG</i>						

The top 10 high demand jobs in S.C., 2004-2014 are:

- Retail sales associates
- Registered nurses
- Customer service representatives
- Janitors & cleaners, except maids & housekeeping cleaners
- Restaurant servers
- General and operations managers
- Team assemblers
- Elementary school teachers, except special education
- Laborers and freight, stock and materials movers
- Nursing aides, orderlies and attendants

The top 10 declining jobs in S.C., 2004-2014 are:

- Textile knitting and weaving machine setters, operators and tenders
- Textile winding / twisting / drawing-out machine setters / operators / tenders
- Sewing machine operators
- Textile bleaching and dyeing machine operators and tenders
- Stock clerks and order fillers
- Order clerks
- Meter readers, utilities
- Machine feeders and off bearers
- Computer operators
- Mail clerks and mail machine operators

Employment Growth Projections *(cont.)*

Of the high-demand occupations, three require associate's or bachelor's degrees. Of the declining occupations, none requires post-secondary education.

Only one occupational group area is projected to grow faster in Spartanburg County than in S.C. from 2007 to 2016 — computer and mathematical science occupations (Table 17). Healthcare and technical occupations are expected to grow by 20%, business and financial operations occupations by 19% and building and grounds cleaning and maintenance occupations by 18%. Personal care and service occupations are projected to have negative growth. Although Spartanburg County has high proportions of production businesses and jobs, occupational growth projections for production industries is only 8%.

Table 17. Occupational Growth Projections, 2007-2016

Occupational Areas	Spartanburg County Projected Growth (%)	S.C. Projected Growth (%)
Management	12	17
Business & Financial Operations	19	22
Computer & Mathematical Science	28	23
Architecture & Engineering	15	15
Life, Physical & Social Services	2	15
Community & Social Services	12	15
Legal	15	21
Education, Training, & Library	5	16
Arts, Design, Entertainment, Sports, & Media	12	17
Healthcare Practitioners & Technical	20	24
Healthcare Support	16	25
Protective Service	5	18
Food Preparation & Serving	8	13
Building & Grounds Cleaning & Maintenance	18	23
Personal Care & Service	-3	7
Sales & Related	11	19
Office & Administrative Support	8	13
Farming, Fishing, & Forestry	7	16
Construction & Extraction	12	19
Installation, Maintenance, & Repair	13	17
Production	8	10
Transportation & Material Moving	6	11

S.C. Department of Commerce

Although computer and mathematical occupations are expected to grow by 28% in Spartanburg County by 2016, Upstate colleges and universities are currently awarding only 3% of degrees in computer and information sciences and 0.7% in mathematics and statistics. Further, healthcare practitioners and technical occupations are projected to increase by 20%; however, Upstate colleges and universities are currently awarding only 5% of degrees in health professions at the bachelor's level and 4% at the associate's level. In academic year 2006-2007, Upstate colleges and universities awarded 11,932 degrees, certificates and diplomas (Table 5).

Of all degrees, the greatest number of certificates and diplomas were awarded in:

- business, management, and marketing (19% with 11% at the bachelor's level)
- health professions (16% with 5% at the bachelor's level and 4% at the associate's level)
- education (12% with 5% at the bachelor's level)

The S.C. Department of Commerce reports that there will be growth in jobs in Spartanburg across most skill levels through 2016. However, based on employment projections, more of Spartanburg County's job growth will be in fields requiring work experience in a related field, associate's degrees, and bachelor's degrees.

As reported in table 15, the top four well-paying jobs in 2016, in terms of numbers of jobs projected for Spartanburg County that require a bachelor's degree or higher are:

- Registered Nurse 3,417 jobs
- General and Operations Manager 2,255 jobs
- Industrial engineer 1,165 jobs
- Middle School Teacher 1,081 jobs

The top four well-paying jobs that do not require a degree projected for Spartanburg County in 2016, in terms of numbers of jobs, will be:

- Team Assembler 6,089 jobs
- Truck Driver 2,625 jobs
- First line supervisor of production and operating workers..... 1,459 jobs
- Machinist..... 996 jobs

Industries of Note

A successful economic base stimulates the development of non-base sectors and propels the local tax base. Economic base industries drive long-term growth in a region and generate wealth from outside the area and are, therefore, important to the region's economic well-being. Industries in the economic base typically provide jobs with higher pay and benefits, as well as better human capital development and promotion opportunities. Other desired characteristics of economic base industries include addition of significant numbers of jobs to the local economy, significant local concentration of the industry, high wages, and high projected growth.

In 2007 the S.C. Department of Commerce, in its Base Labor Market Analysis of Spartanburg County, determined that there are three notable economic base industries in Spartanburg County that met all six criteria for designation as a “six star” sector:

- 2002-07 employment growth of 100 or more which indicates that the sector added a significant number of jobs
- 2002-07 employment growth rate greater than the county jobs growth rate of 2.5% which indicates that the sector added jobs
- A location quotient of at least 1.25 which indicates that the sector had significant concentration in the county compared to the U.S.
- Competitive effect greater than 0 which indicates growth in jobs in the county after accounting for overall U.S. employment growth and growth/decline in the sector in the U.S.
- Average annual wage greater than the 2007 average for the county of \$37,990, indicating that the sector pays wages greater than average for the county
- Average or above average projected growth indicating whether the sector is expected to add jobs

The “six star” sectors in Spartanburg County are:

- Fabricated metal product manufacturing
- Merchant wholesalers, durable goods
- Management of companies and enterprises

The following sectors are considered “five star” sectors for Spartanburg County as they meet five of the above criteria but are also base economy sectors:

- Heavy and civil engineering construction (location quotient below 1)
- Plastics and rubber products manufacturing (below-average projected growth)
- Truck transportation (slightly below average wages)
- Warehousing and storage (below average wages)
- Professional, scientific and technical services (location quotient below 1)

Other sectors which fit the base economy criteria, have above-average wages, have a high concentration in the area and are projected to grow are:

- Chemical manufacturing
- Paper manufacturing
- Transportation equipment manufacturing
- Nonmetallic mineral product manufacturing
- Machinery manufacturing
- Electrical equipment, appliance and component manufacturing

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Appendices

Goal 6 Indicators

Because Spartanburg is a dynamic community, the issues that impact the growth, health and quality of life for its citizens are in flux. Since the 2005 iteration of the Community Indicators VI report was presented to the community, it has become necessary or beneficial to change a number of the indicators for various goals. The subject matter experts who have advised on these changes were professionals who work in economic, labor force and other organizations whose missions are driven by these indicators. The rationale for the revised indicators for Goal 6 is provided below. A number of indicators were expanded to provide a more comprehensive picture of the economy in Spartanburg County. In the current iteration, demographic data by race and gender were included where appropriate, and peer county data were provided for comparison for most indicators.

Indicators for Goal 6	
Community Indicators VI	Current Iteration
Poverty by Census Tract	Income
Median Family Income	Living Wage
Housing Costs	Employment by Occupational Area
Home Ownership	Labor Force Education
Unsound Housing	Unemployment Rate
Availability of Full-Time Work	Labor Force Demographics (labor shed, transience, worker age, commuting patterns)
Per Capita Income	Employment by Sector
	Wages by Sector
	Employment Growth Projections
	Industries of Note

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Spartanburg Community Indicators Project is a collaboration of The Spartanburg County Foundation, United Way of the Piedmont, Spartanburg County Government, and The University of South Carolina Upstate. It reports on progress of key issues that are the clearest indicators of quality of life in the County of Spartanburg, South Carolina. Its goal is to report on data and community initiatives to inspire dialogue and strategy that leads to change within the community.

www.StrategicSpartanburg.org